Branson™ MISSOURI ★

2021 Visitor Profile Research

Report Prepared February 2022

H2R

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BRANSON VISITOR PROFILE

Overview

Purpose. The purpose of conducting the Visitor Profile Research for the Branson Convention & Visitors Bureau is to provide area decision makers a behavioral, demographic and trend comparison of Branson travelers over the course of the year. This information provides marketers and other decision makers with near real-time information throughout the year via the online dashboard as to who is visiting Branson and where the greatest changes are occurring.

Target Audience. Contact information collected from Branson visitors from more than 25 locations around the Branson area was used to interview visitors via email, supplemented with a nationwide panel.

Sample. A total of 1,680 Branson visitors were interviewed for this study throughout the year, providing a maximum margin of error of +/-2.4% at a 95% confidence interval – considered comparatively strong by industry standards.

Additionally, 1,000 nationwide travelers were interviewed for this study, whether a recent Branson visitor or not, providing a maximum margin of error of +/-3.1% at a 95% confidence interval.

New Gen Pop Methodology

0-650-mile region

- More objective, larger sample size, covers every corner of the Greater Branson/Lakes Area—as was introduced with the Scout Report.
- All travelers are included in this study, not just recent Branson visitors.
- All area locations included instead of only high-traffic entertainment locations.
- Study includes Non-Visitors and Lapsed Visitors in addition to Recent Visitors.
- Thus, we're learning as much about the target market (out the front windshield) as we are from past visitor behavior (rearview mirror), making the results more actionable.
- Of course, different method, different timeframe, different locations yield a different profile too. No longer just a profile of the Branson entertainment visitor, now it is a profile of the overarching Branson visitor regardless where they visited in the area.

Branson 2021 Visitor Profile Research

Key Takeaways

Key Takeaways

- **New Method & New Insights.** Beginning in 2021, Branson launched a new survey that covers far more ground. This new study uses a gen pop panel to reach general travelers and identify/survey those who have visited Branson recently and, in the past, as well as provide insight into Branson's contextual market share and Non-Visitors' perceptions of the area along with reasons they have for not visiting Branson. It also explores how Branson's brand health stacks up against competitive destinations.

- **Parallel Intercept Study.** To provide a "bridge" to history, Branson also continued conducting its intercept visitor survey so that the results from it (all recent visitors) could be compared & contrasted. Unlike the gen pop survey that interviews general travelers to identify those who visited Branson, the intercept survey has historically polled travelers who visited a select number of area activities and attractions. However, because of the potential for location bias like was measured with the introduction of the new DMA report fueled by travelers' cell phone pings, this old methodological approach is being retired in opt for a more objective approach that offers insights across a far larger travel landscape.

Key Takeaways

- **New Method, Similar Insights.** While the methodology for gathering Visitor (and Non-Visitor) insights has changed, the same questions/information continues to be gathered on Branson visitors. That is, the survey still tracks visitor activity participation, functional drivers, spending, intent to return, etc.; however, with any new methodology there are some differences that have arose with this new approach. That is, instead of tracking travelers who visited select attractions in Branson (and, therefore, inherently skewed toward entertainment visitors patronizing paid attractions) this new methodology interviews everyone who visited any part of the Branson/Lakes Area (regardless whether they were visiting for entertainment purposes or on a shopping venture) and is, therefore, considered more representative of the entire region.

- Interestingly, however, at 30,000 feet most of the behavioral insights derived from the new gen pop survey are directionally similar to previous results generated from the intercept survey. For instance, while the gen pop survey shows that 36% of Branson travelers visit shows instead of 66% indicated from the intercept survey, shows still rank as the second most popular activity in Branson second only to shopping. The same was true for spending, intent to return, etc.
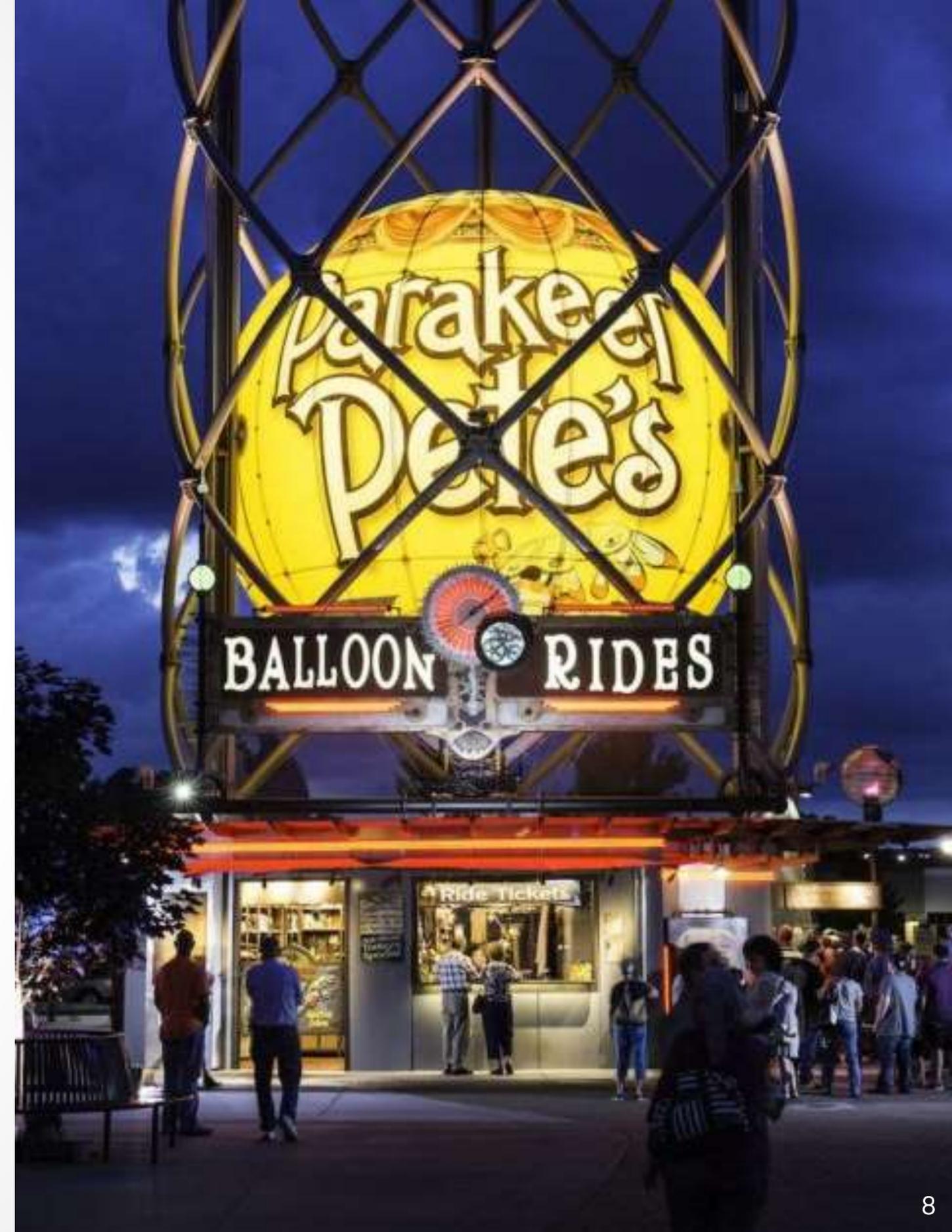
Key Takeaways

- **A Few Notable Differences.** While visitor behavior is contextually similar under both methodologies, there is a statistically significant difference in visitors' average reported age and party composition. That is, while the intercept survey that intentionally skewed toward the entertainment visitor reported an average age of 57 years and 29% families, the broader gen pop study reveals that when all visitors are included the average age is actually closer to 45 years with 62% families.

- **Record Visitation.** There's no getting around it, COVID-19 had a significant impact on travel around the country. For Branson, 2020 visitation fell by 31% below the record-setting visitation of 9.1M in 2019. But fortunately, Branson enjoyed a very strong rebound in 2021 reaching nearly 10.0M and setting a new record.

- **Brand Health.** The new gen pop methodology reveals a great many insights that the previous methodology could not accurately evaluate because it only interviewed entertainment visitors from select attractions. This year we learned that relative to Branson's competitors, the area earns an above average level of aided brand awareness (44% vs an average of 43%), market share from the past 2 years (13% vs an average of 12%) and share of voice (23% vs 19% average). Likewise, Branson's level of conversion of prospects into visitors and retention of past visitors are also both above average.

Key Takeaways

- **Brand Perception**. Branson is considered a family-friendly destination that offers live music in a safe and wholesome environment. Its most popular activities include shopping, shows, the downtown area and outdoor recreation among other things.

- Among those participating in differing activities, however, the functional drivers that visitors indicate are primarily responsible for visiting Branson include Silver Dollar City, Music Shows and Shopping.

- **Areas of Concern**. Based on what travelers view as most important paired with how they view the Branson area, areas of concern include unique restaurants, value for the dollar, offering fresh, new entertainment options and being easy to get to.

Key Takeaways

- **Non-Visitors.** Unsurprisingly, given they have not visited, Branson's Non-Visitors exhibit comparatively low levels of interest and/or intent to visit. Stated Barriers indicate the primary reasons for not visiting are that they prefer other places, have not received a recommendation from a friend or family member and that they do not know enough about Branson to have an informed opinion. Derived Barriers, which explore the correlation between each barrier and respondents' intent to visit, indicated that there is also a notable lack of interest, a perception that the quality of entertainment may be an issue and/or do not care for country music.

Branson 2021 Visitor Profile Research

Key Performance Indicators

Branson's visitation rebounded in a strong way in 2021. Visitation neared 10 million for the first time thanks to +10% growth over 2019.

History of Visitation to Branson (000s)*
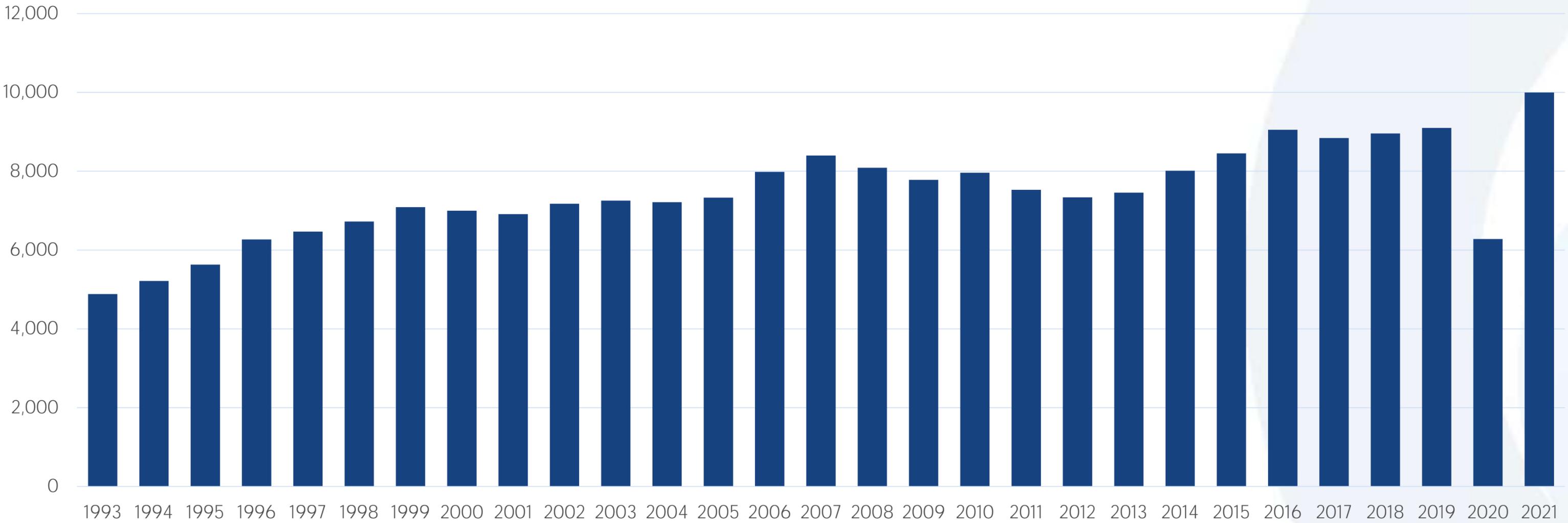
*Assumes Base=7.0M (2000, DKSA)

SOURCE: HISTORICAL ECONOMETRIC MODEL

After sustaining a 31% decrease in visitation in 2020, 2021 provided the largest YoY increase Branson has experienced since the early 1990's (ending the year up 10.0% over 2019).

History of Visitation to Branson (000s)*

	2013	2014	2015	2016	2017	2018	2019	2020	2021
	+1.6%	+7.4%	+5.0%	+7.1%	-2.3%	+1.3%	+1.5%	-30.9%	+10.0%

2021 End-of-Year
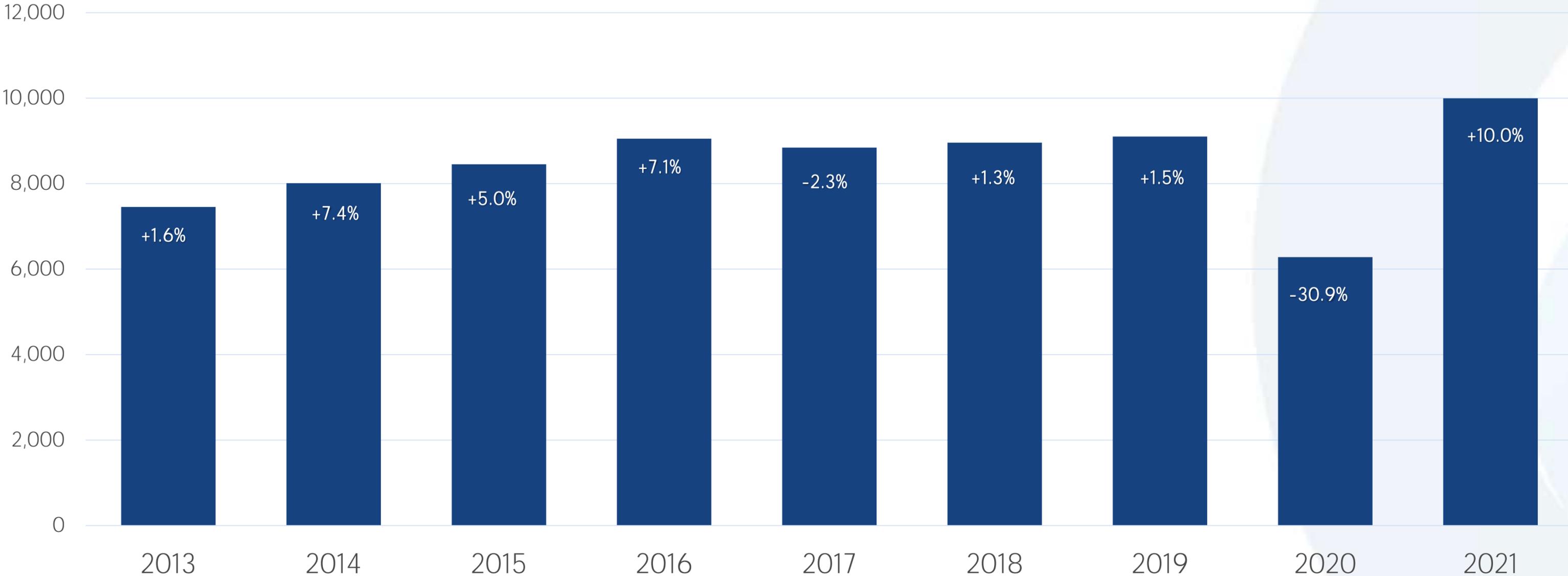
Every sales tax source measured across the region posted record year-over-year increases relative to 2020 and more importantly, they also set records relative to 2019.

Area Tax Revenues — Variance to 2020 & 2019

	vs 2020	vs 2019
1% City Sales Tax	48.1%	25.1%
Tourism Tax	106.2%	33.6%
TCED Tax	50.0%	18.7%
Stone County Tax	28.0%	16.7%
Taney County Tax	41.3%	29.8%
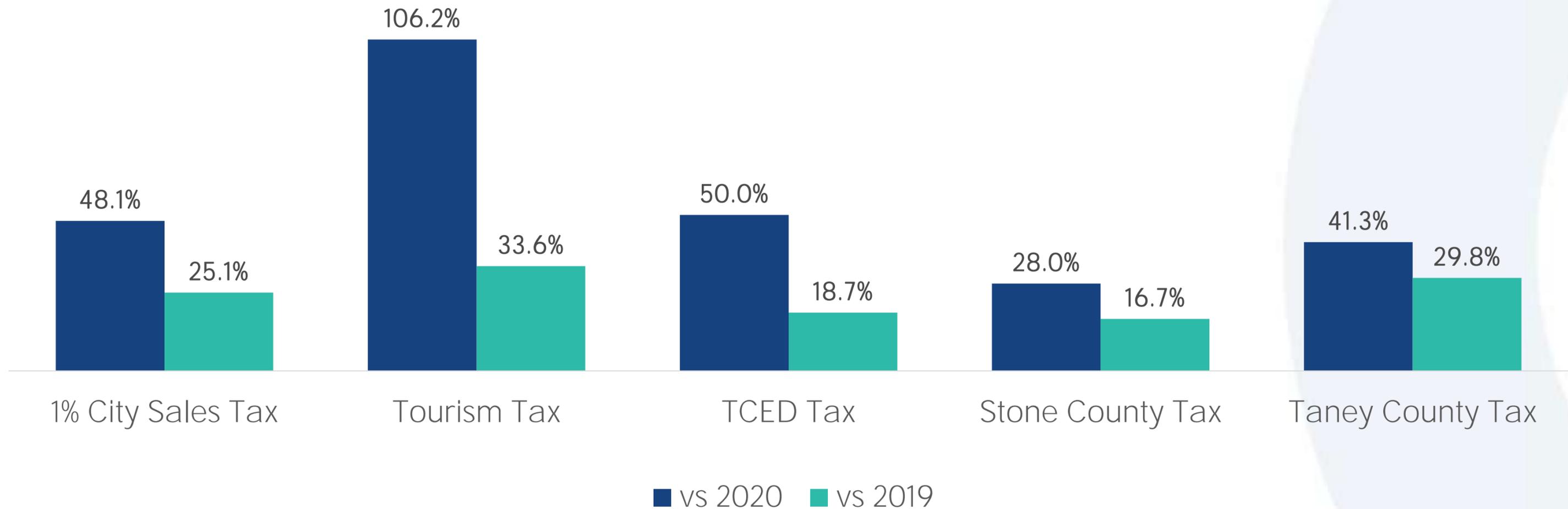
Branson 2021 Visitor Profile Research

Brand Health

Nationwide, nearly 44% of travelers indicate they are familiar with Branson as a travel destination, slightly higher than the competitive set average of 43%.

Aided Brand Awareness

Competitive Set Average: 43%

Destination	Value
St. Louis, Missouri	52%
Myrtle Beach, South Carolina	50%
Destin, Florida	48%
Kansas City, Missouri	46%
Branson, Missouri	44%
Asheville, North Carolina	37%
Pigeon Forge, Tennessee	36%
Gulf Shores, Alabama	36%
Wisconsin Dells, Wisconsin	34%
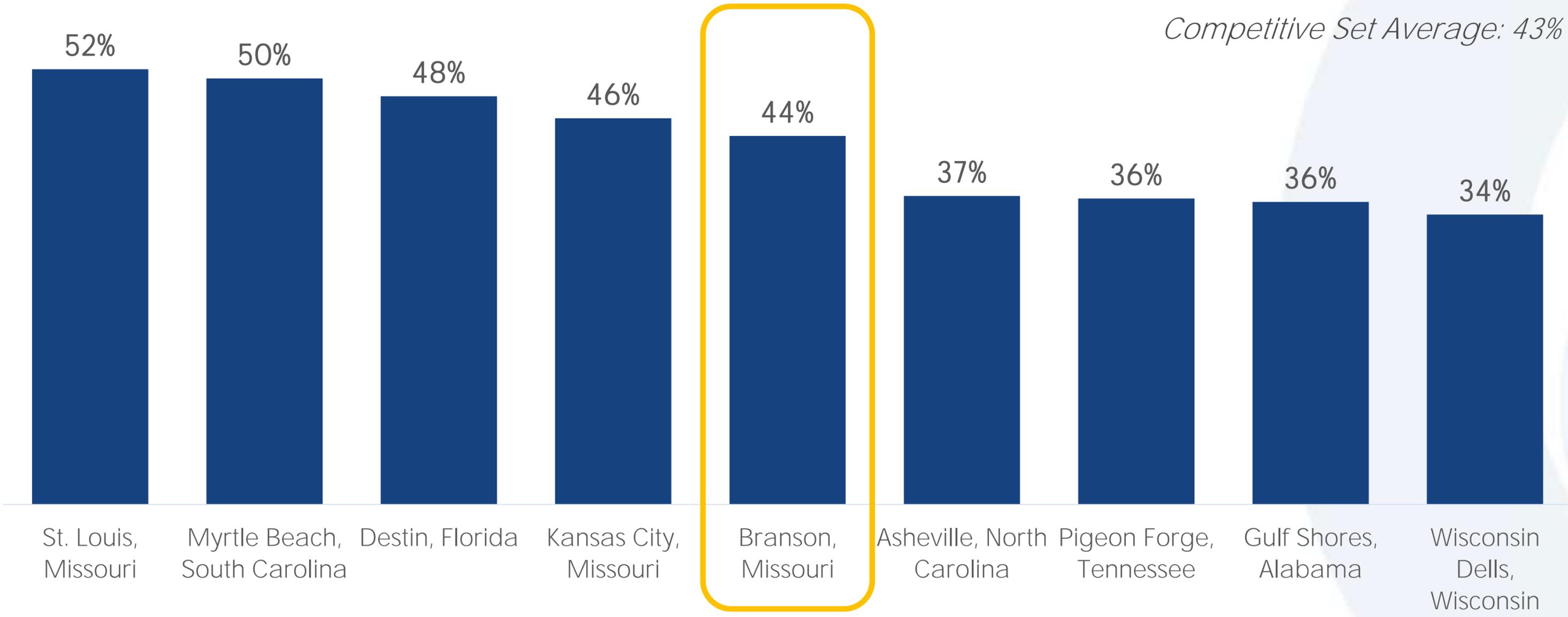
Q4: Which of the following travel destinations are you familiar with (e.g., heard of, considered visiting or visited)? Please select all that apply.

RESPONDENT BASE: PANEL RESPONDENTS | N=VARIES BY DESTINATION

Among travelers across the center of the country, Branson (13%) earns the third highest share of recent visitors in the competitive set.

Market Share – Visited in Past 2 Years

Competitive Set Average: 12%
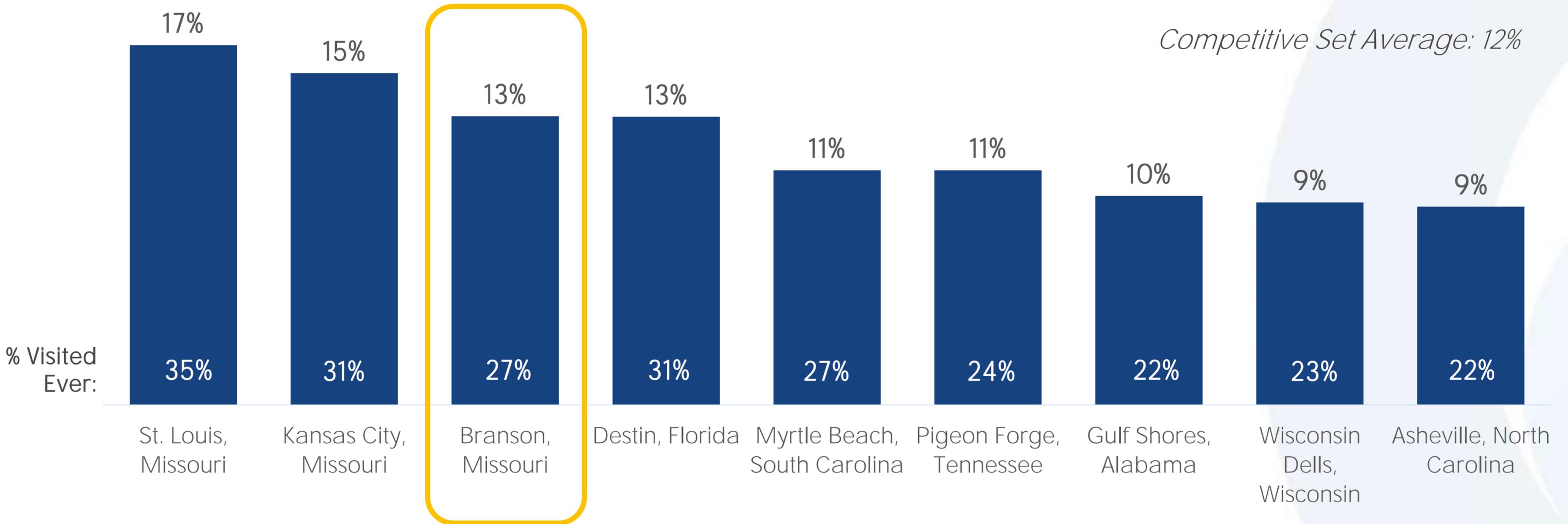
St. Louis, Missouri	Kansas City, Missouri	Branson, Missouri	Destin, Florida	Myrtle Beach, South Carolina	Pigeon Forge, Tennessee	Gulf Shores, Alabama	Wisconsin Dells, Wisconsin	Asheville, North Carolina
17%	15%	13%	13%	11%	11%	10%	9%	9%

% Visited Ever:

| 35% | 31% | 27% | 31% | 27% | 24% | 22% | 23% | 22% |

Q6: Please indicate your prior visitation and/or interest in visiting the following destinations. Please select all that apply.

Branson enjoys comparatively strong recent market share and has significant market potential (37%) which runs about average compared to competitive destinations.

Considerers, Lapsed Visitors & Recent Visitors

Destination	% Considered Visiting But Never Have	% Visited More Than 2 Years Ago	% Visited in Past 2 Years	Total
St. Louis, Missouri	10%	19%	17%	45%
Destin, Florida	13%	18%	13%	44%
Myrtle Beach, South Carolina	16%	16%	11%	43%
Kansas City, Missouri	8%	15%	15%	39%
Branson, Missouri	10%	13%	13%	37%
Pigeon Forge, Tennessee	8%	13%	11%	32%
Gulf Shores, Alabama	9%	12%	10%	31%
Asheville, North Carolina	9%	13%	9%	31%
Wisconsin Dells, Wisconsin	8%	13%	9%	31%

Competitive Set Average—37%
Considerers: 10%
Lapsed Visitors: 15%
Recent Visitors: 12%

■ % Considered Visiting But Never Have   ■ % Visited More Than 2 Years Ago   ■ % Visited in Past 2 Years
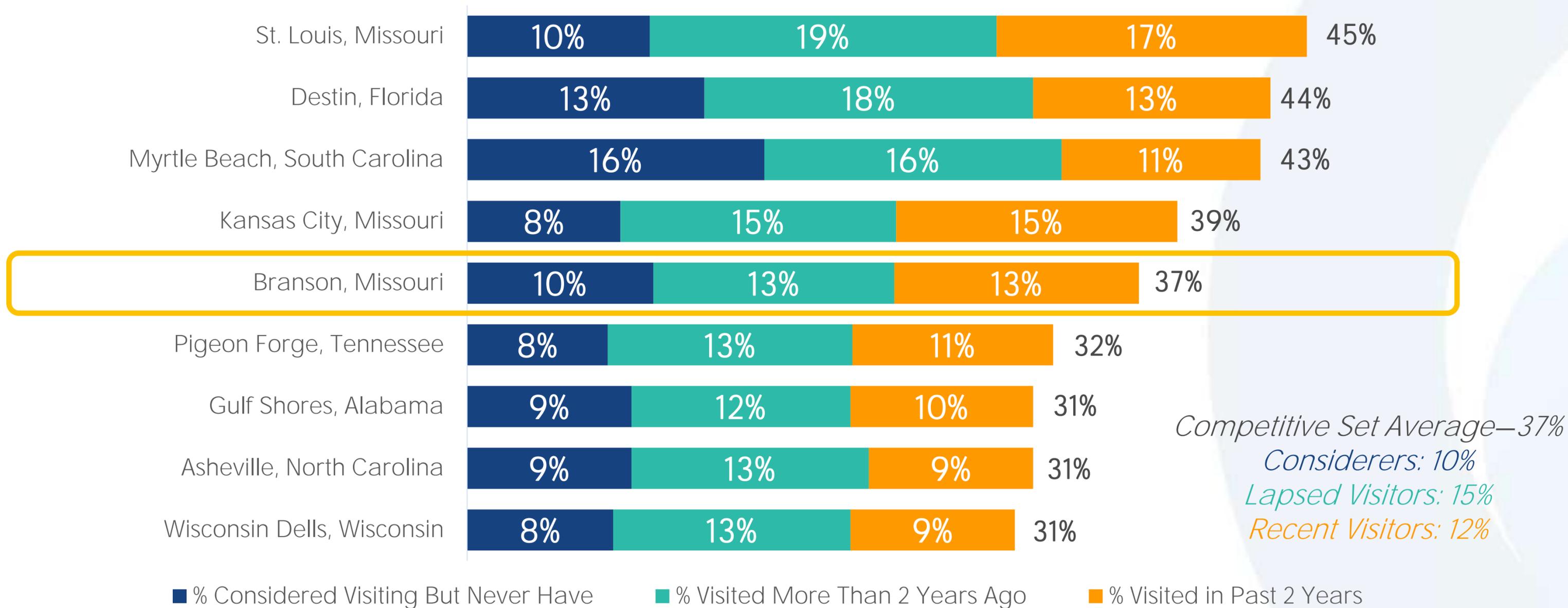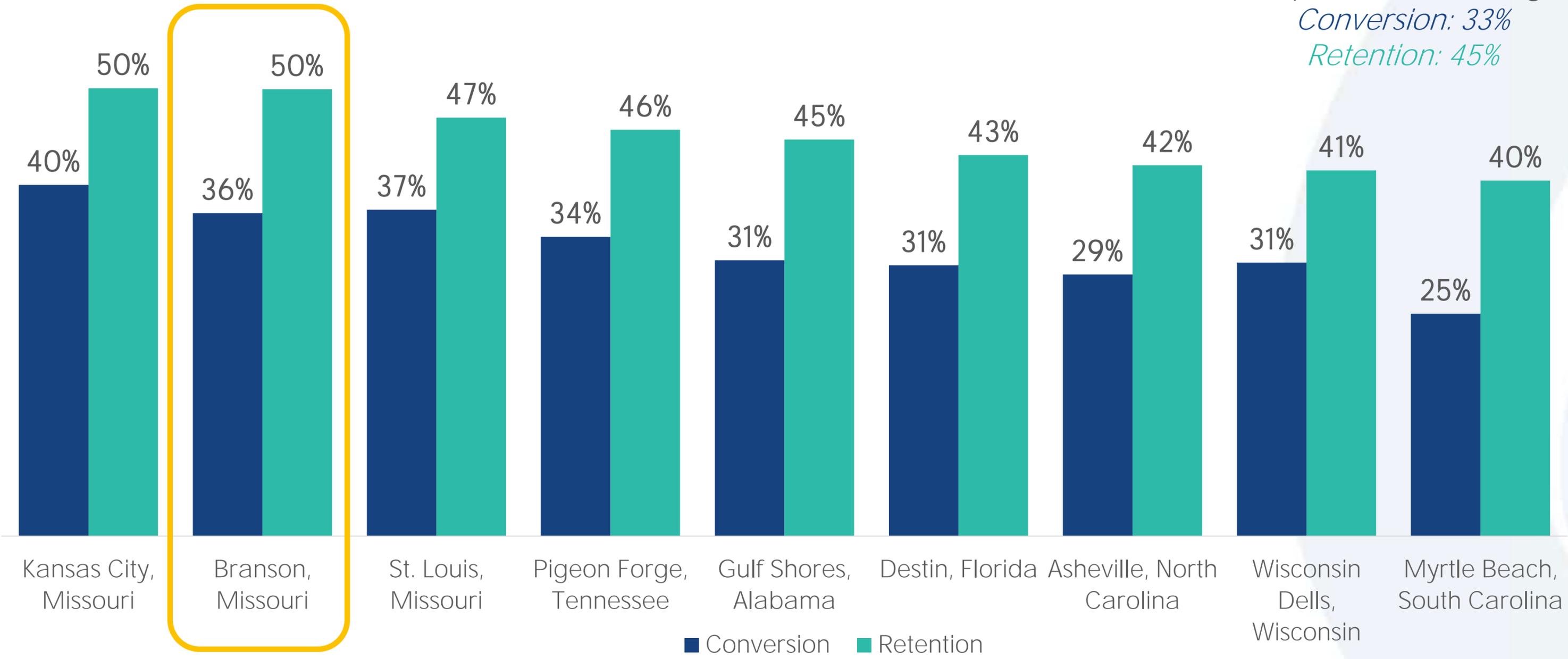
Q6: Please indicate your prior visitation and/or interest in visiting the following destinations. Please select all that apply.

RESPONDENT BASE: PANEL RESPONDENTS FAMILIAR OF DESTINATION | N=VARIES BY DESTINATION

Branson has above average conversion (36%) and retention (50%) relative to the competitive set, on par with both Kansas City and St. Louis.

Conversion & Retention Rates*

Competitive Set Averages
Conversion: 33%
Retention: 45%

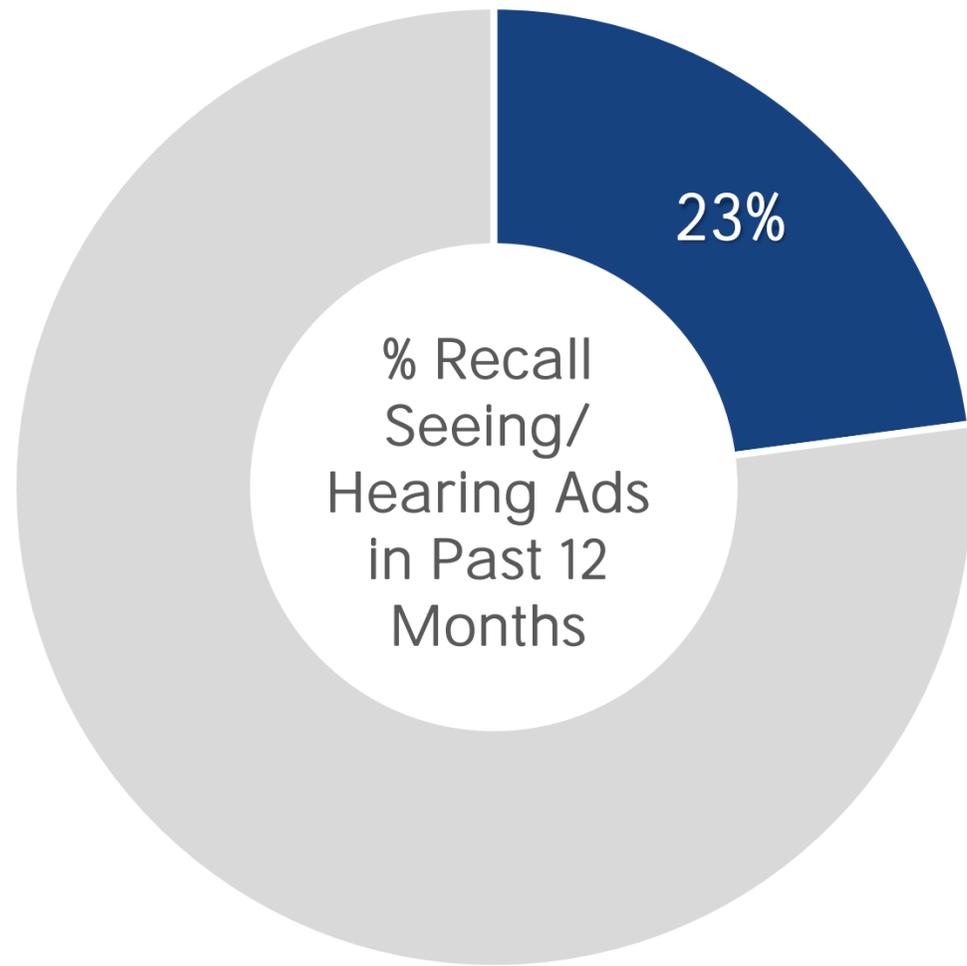|	Conversion	Retention
Kansas City, Missouri	40%	50%
Branson, Missouri	36%	50%
St. Louis, Missouri	37%	47%
Pigeon Forge, Tennessee	34%	46%
Gulf Shores, Alabama	31%	45%
Destin, Florida	31%	43%
Asheville, North Carolina	29%	42%
Wisconsin Dells, Wisconsin	31%	41%
Myrtle Beach, South Carolina	25%	40%

■ Conversion ■ Retention

Q6: Please indicate your prior visitation and/or interest in visiting the following destinations.
Conversion Rate = Recent Visitors ÷ Market Potential
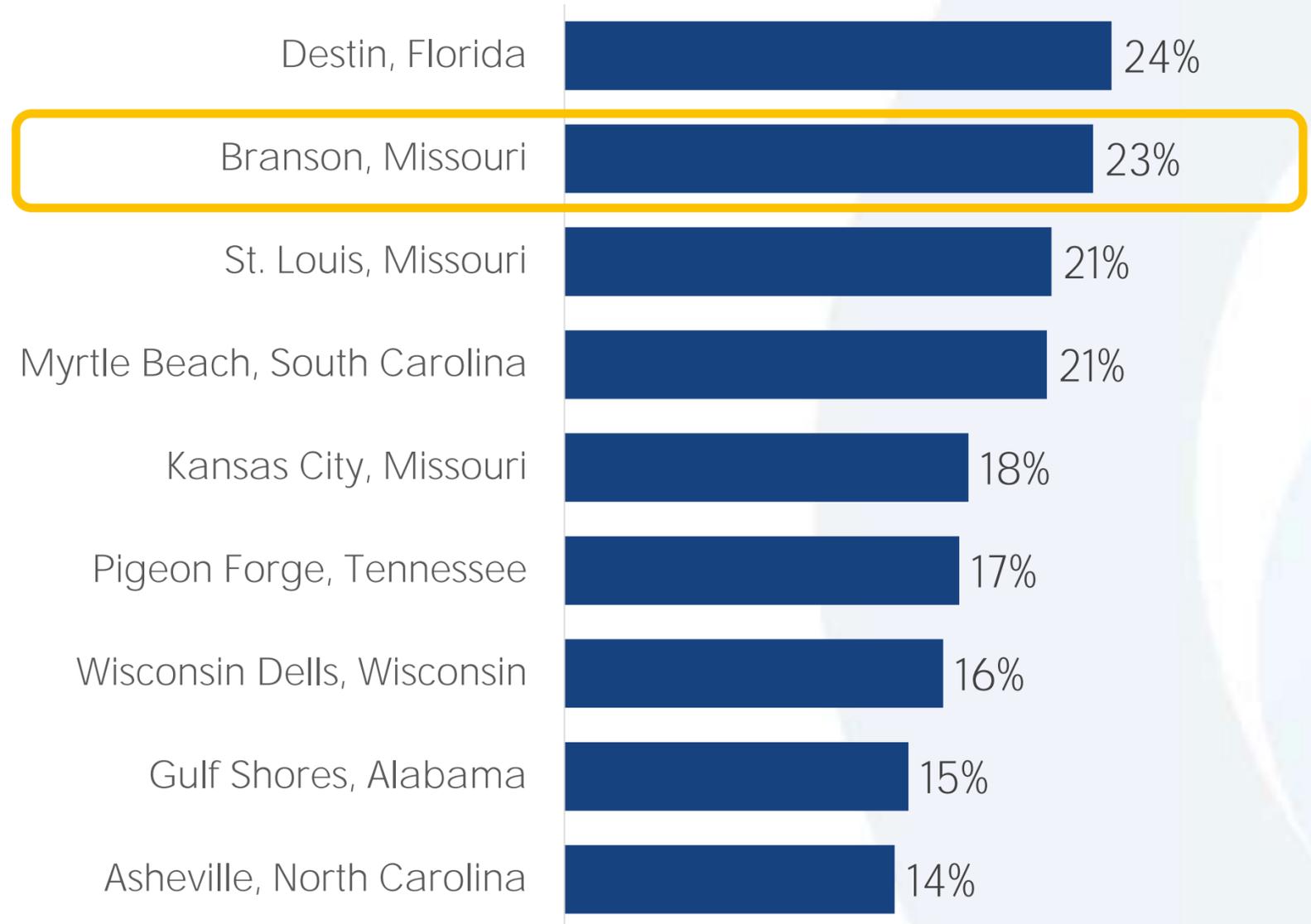Retention Rate = Recent Visitors ÷ Visitors Ever

RESPONDENT BASE: PANEL RESPONDENTS FAMILIAR OF
DESTINATION | N=VARIES BY DESTINATION

Branson has the second highest Share of Voice (assisted marketing awareness) among the competitive set, well above the average (23% vs 19%).

Share of Voice – Branson

23%

% Recall Seeing/ Hearing Ads in Past 12 Months

Share of Voice – Competitive Set

Destination	Share of Voice
Destin, Florida	24%
Branson, Missouri	23%
St. Louis, Missouri	21%
Myrtle Beach, South Carolina	21%
Kansas City, Missouri	18%
Pigeon Forge, Tennessee	17%
Wisconsin Dells, Wisconsin	16%
Gulf Shores, Alabama	15%
Asheville, North Carolina	14%

Competitive Set Average: 19%

Q5: Which of the following destinations have you seen/heard advertising for in the past 6 months? Please select all that apply.

RESPONDENT BASE: PANEL RESPONDENTS AWARE OF DESTINATION | N=VARIES BY DESTINATION
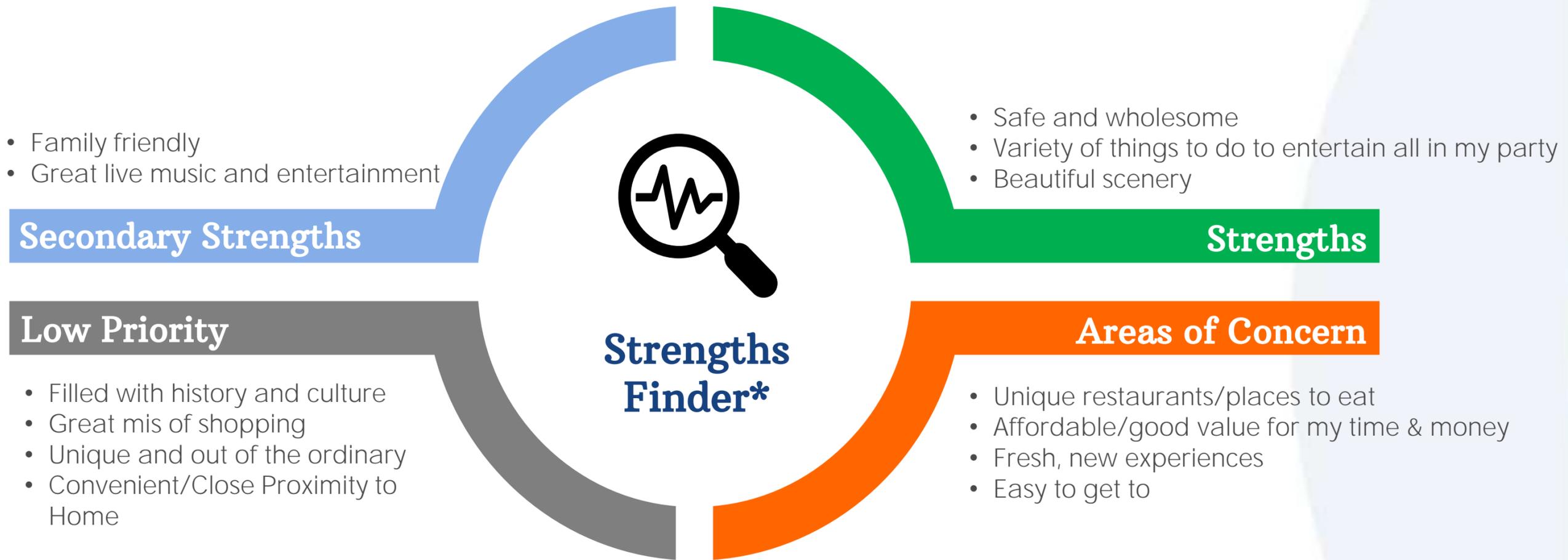
Travelers view Branson as a family friendly destination with great live music and entertainment in a safe and wholesome environment.

Branson Brand Attributes
% Describes very well/Perfectly

Attribute	%
Family friendly	72%
Great live music and entertainment	69%
Safe and wholesome	68%
Variety of things to entertain every member of my party	65%
Beautiful scenery	64%
Unique restaurants/places to eat	59%
Affordable/Good value for my time and money	59%
Unique and out of the ordinary	58%
Filled with history and culture	56%
Easy to get to	55%
Great mix of shopping	54%
Filled with history and culture	51%
Convenient/Close Proximity to my Home	43%

Q56. Please rate how well you believe the following attributes describe Branson, MO. (5-point scale)

RESPONDENT BASE: PANEL RESPONDENTS FAMILIAR WITH BRANSON | N=436

Branson has many strengths (above average importance and brand perception) such as safe and wholesome, variety and beautiful scenery. But unique places to eat, value and new experiences are potential areas of concern (above average importance, below average brand perception).

Secondary Strengths
- Family friendly
- Great live music and entertainment

Strengths
- Safe and wholesome
- Variety of things to do to entertain all in my party
- Beautiful scenery

Low Priority
- Filled with history and culture
- Great mis of shopping
- Unique and out of the ordinary
- Convenient/Close Proximity to Home

Areas of Concern
- Unique restaurants/places to eat
- Affordable/good value for my time & money
- Fresh, new experiences
- Easy to get to

Strengths Finder*

Q49: Please indicate how important you find each of the following attributes or characteristics when thinking about destinations you'd like to visit for leisure. 5-point scale
Q56. Please rate how well you believe the following attributes describe Branson, MO. (5-point scale)

RESPONDENT BASE: PANEL RESPONDENTS FAMILIAR WITH BRANSON | N=436

Based upon attributes considered most important and correlated with intent to visit, it appears that Branson's best candidates for Unique Selling Propositions (USP) are its great live music and entertainment, location convenience and great mix of shopping.

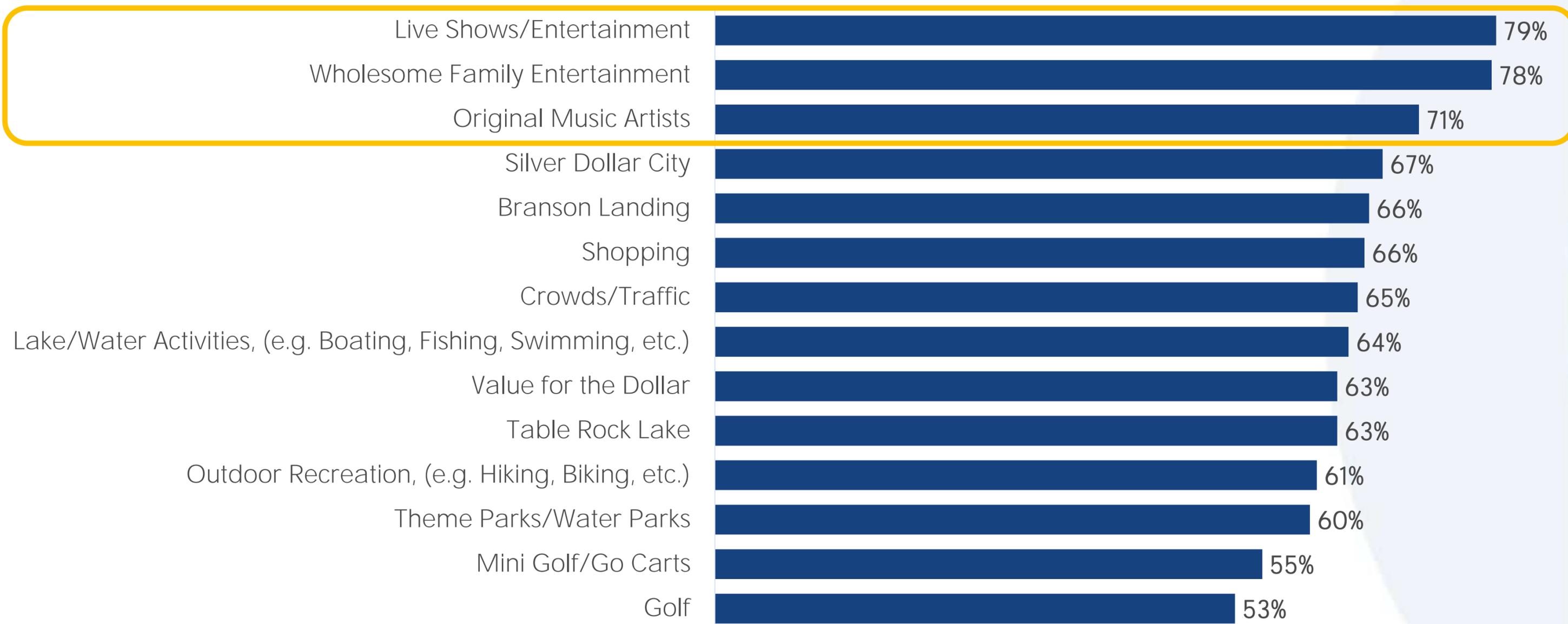**Choice Drivers: Brand Attribute Ratings Correlation with Intent to Visit**

Attribute	Value
Great live music and entertainment	44%
Convenient/Close Proximity to my Home	41%
Great mix of shopping	40%
Family friendly	36%
Variety of things to entertain every member of my party	28%
Unique restaurants/places to eat	28%
Unique and out of the ordinary	28%
Easy to get to	26%
Fresh, new experiences	24%
Filled with history and culture	21%
Beautiful scenery	16%
Affordable/Good value for my time and money	15%
Safe and wholesome	8%

Q56. Please rate how well you believe the following attributes describe Branson, MO.
(5-point scale)

The activities that travelers most associate with Branson include live shows/entertainment, wholesome family entertainment and original music artists.

Activities Most Associated with Branson
% Somewhat Associate/Very Strong Association

Activity	%
Live Shows/Entertainment	79%
Wholesome Family Entertainment	78%
Original Music Artists	71%
Silver Dollar City	67%
Branson Landing	66%
Shopping	66%
Crowds/Traffic	65%
Lake/Water Activities, (e.g. Boating, Fishing, Swimming, etc.)	64%
Value for the Dollar	63%
Table Rock Lake	63%
Outdoor Recreation, (e.g. Hiking, Biking, etc.)	61%
Theme Parks/Water Parks	60%
Mini Golf/Go Carts	55%
Golf	53%

Q57. Which of the following types of activities and attractions do you most enjoy when traveling for leisure? Please select all that apply.

RESPONDENT BASE: PANEL RESPONDENTS FAMILIAR WITH BRANSON | N=436

Branson 2021 Visitor Profile Research

Visitor Profile

Core and Primary market visitation increased again this year as the pandemic resulted in an increase in regional travel and an even larger number of repeat visitors.
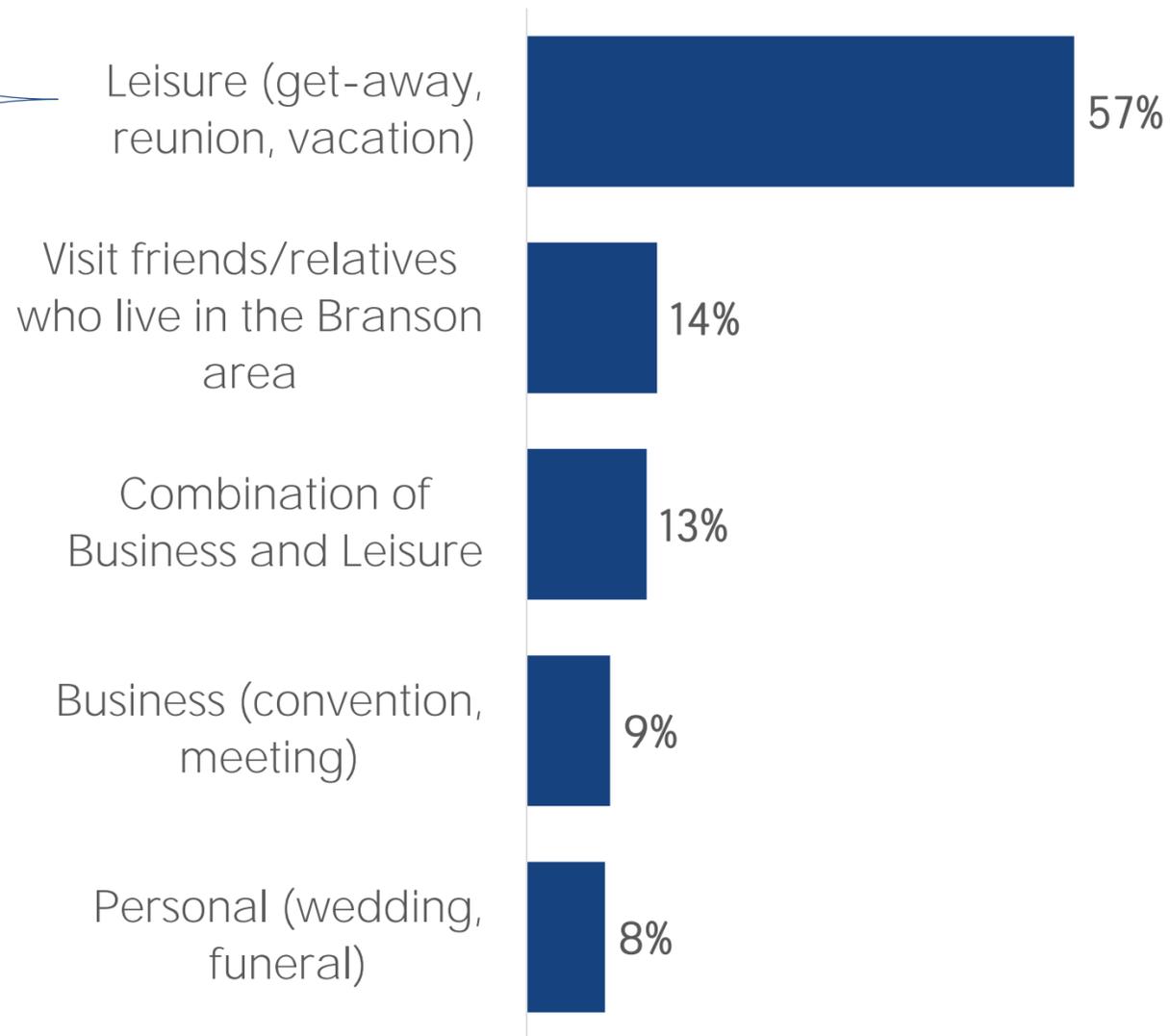
Distance Traveled to Branson

Core Market
0-100 miles
17.3%

+19%
versus
2019

Outer Market
301+ miles
39.7%

-11%
versus
2019

+5%
versus
2019

Primary Market
101-300 miles
43.0%
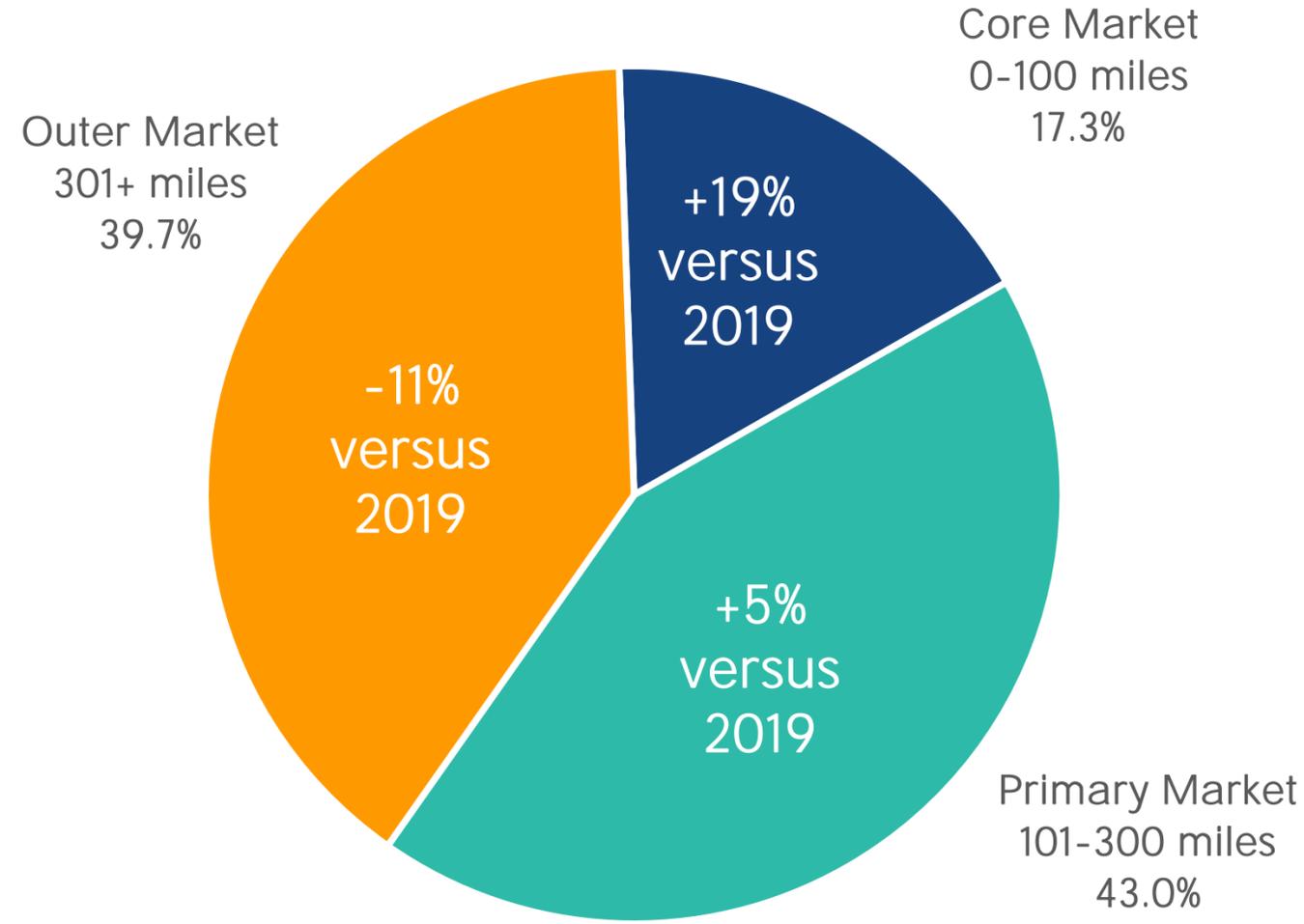
First-Time & Repeat Visitors

First-Time
Visitors
12%

Repeat
Visitors
88%
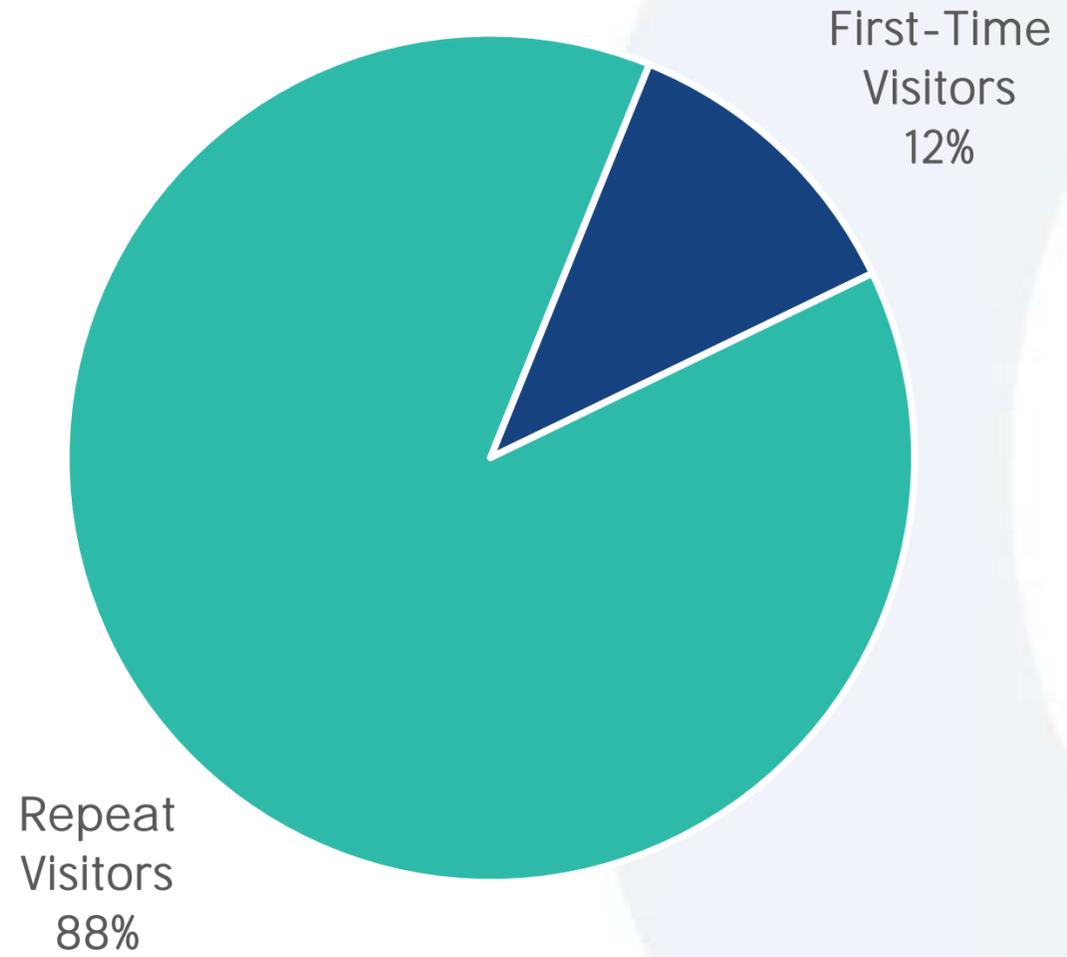
Branson Scout Report/ DMA Report.
Q8. Which of the following best describes your most recent visit to the Branson/Lakes area?

Leisure was the primary purpose of over half of Branson's visits, with the average decision time just shy of two months.

Primary Purpose of Visit

Intercept visitors were predominantly in Branson for leisure purposes (91%), taking 73.7 days on average to make decision to visit.

Purpose	%
Leisure (get-away, reunion, vacation)	57%
Visit friends/relatives who live in the Branson area	14%
Combination of Business and Leisure	13%
Business (convention, meeting)	9%
Personal (wedding, funeral)	8%

Days in Advance Decided to Visit/Book

Avg Decision Time: 50.2 Days
Avg Booking Time: 36.1 Days

	Within 1 week	Within 1 month	2-3 months	Over 3 months
Planning Time	22%	42%	24%	11%
Booking Time	38%	45%	11%	6%

■ Planning Time   ■ Booking Time
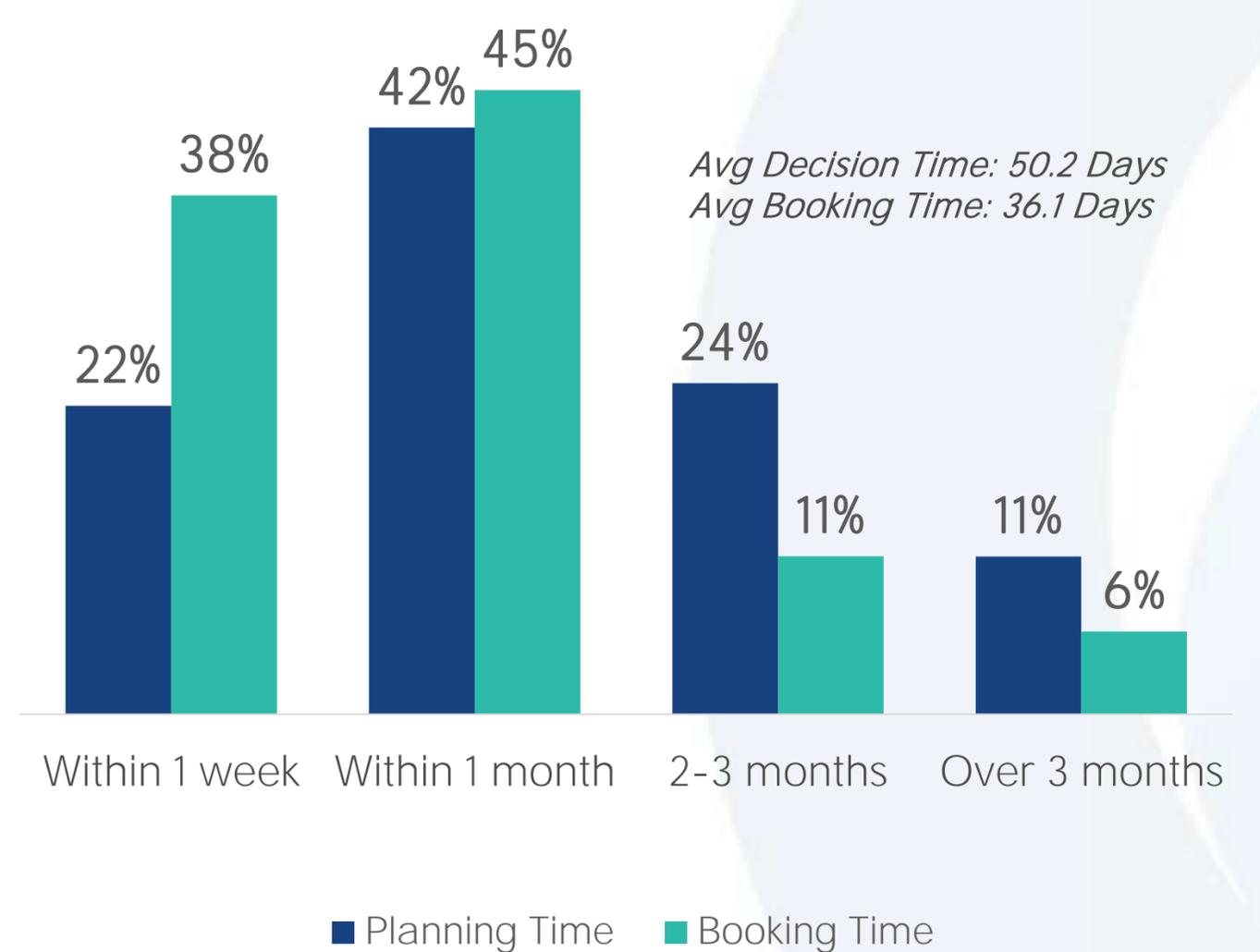
Q11: Which of the following best describes your primary purpose for visiting Branson on this occasion?
Q12: To the best of your recollection, how many days in advance did you begin to consider making this trip to the Branson/Lakes area?
Q14: Approximately how many days in advance did you book this trip to the Branson/Lakes area?
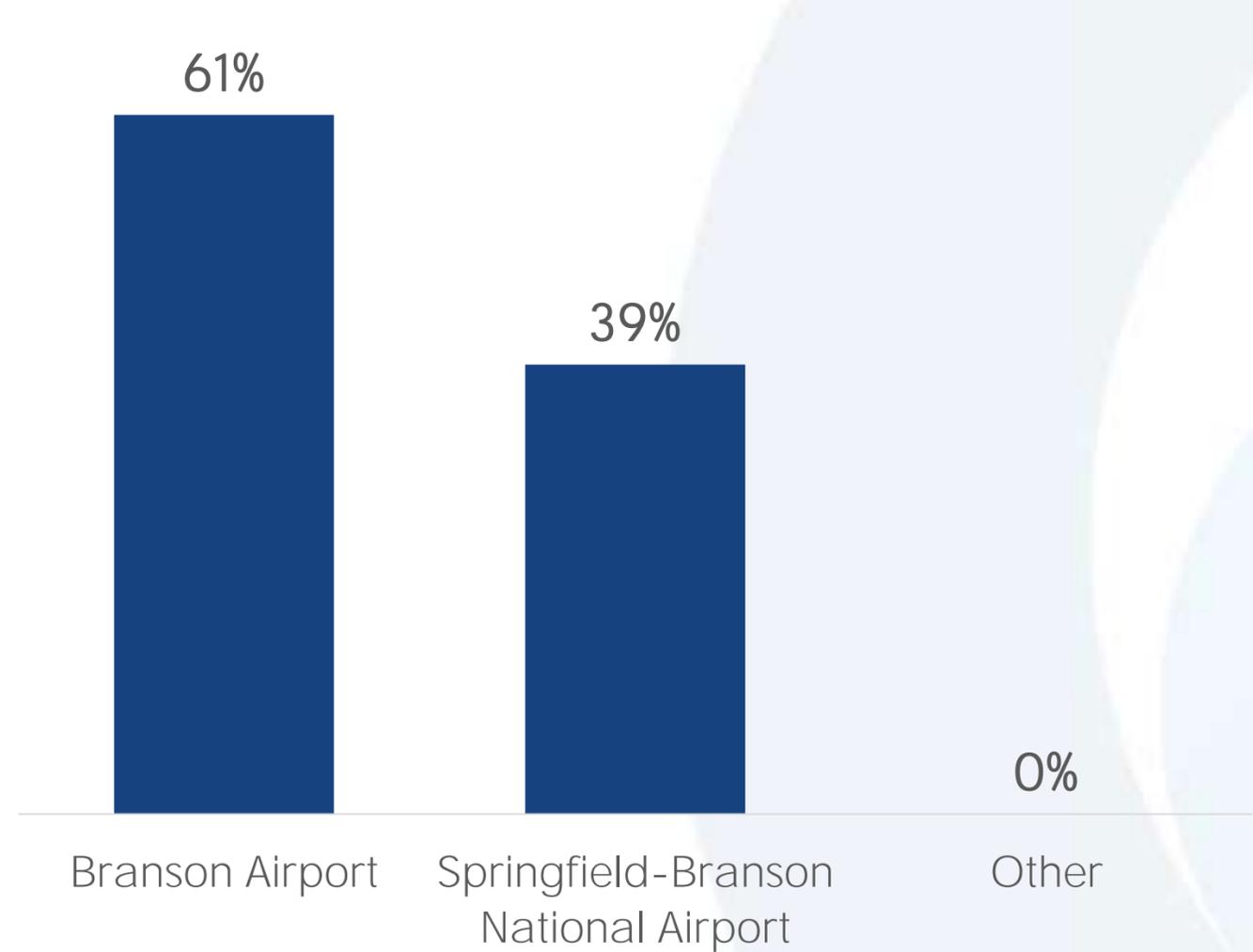
The vast majority of Branson visitors arrived by personal auto, followed distantly by camper/RV or flight into the region using the Branson or Springfield airports.

Intercept visitors were much more likely to have traveled to Branson using a personal auto (+43% at 87%), and much less likely to have flown (-69% at 4%).
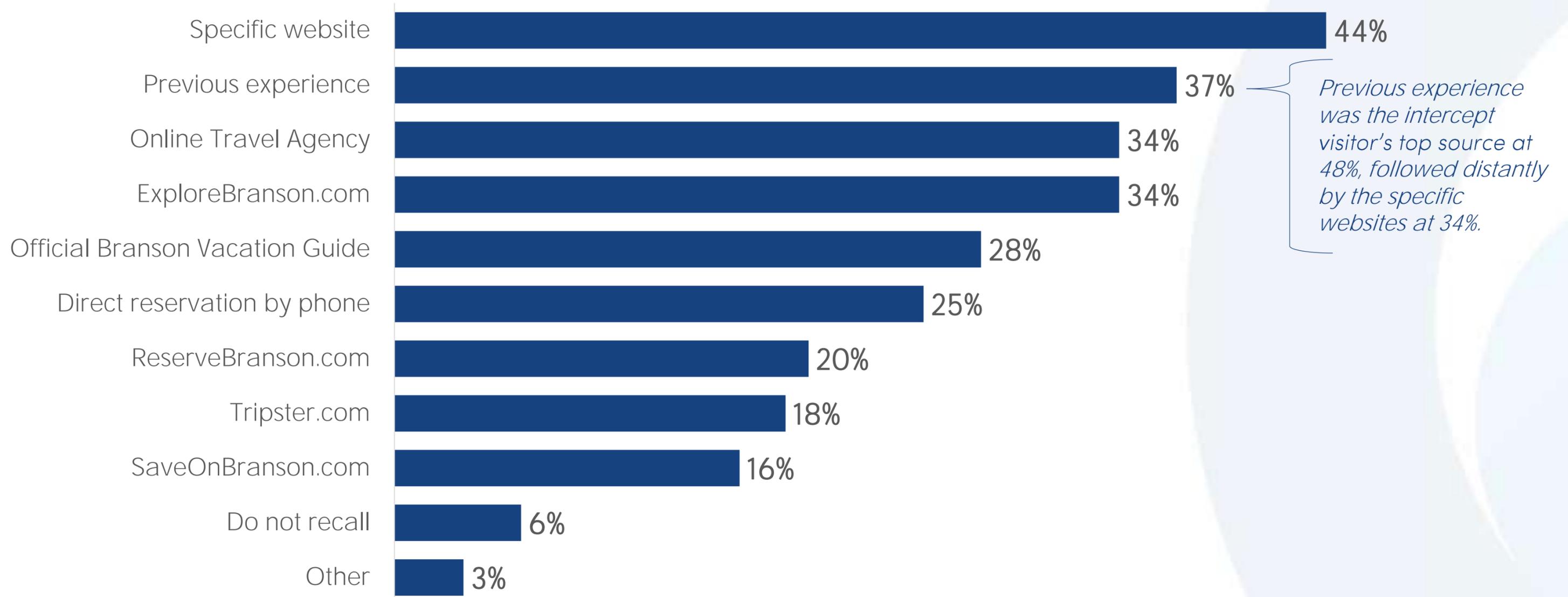
Transportation Used

- Personal auto — 61%
- Camper/RV — 16%
- Flew — 13%
- Church bus — 6%
- Motorcoach/Bus — 3%
- Other — 2%

Airport Used

- Branson Airport — 61%
- Springfield-Branson National Airport — 39%
- Other — 0%
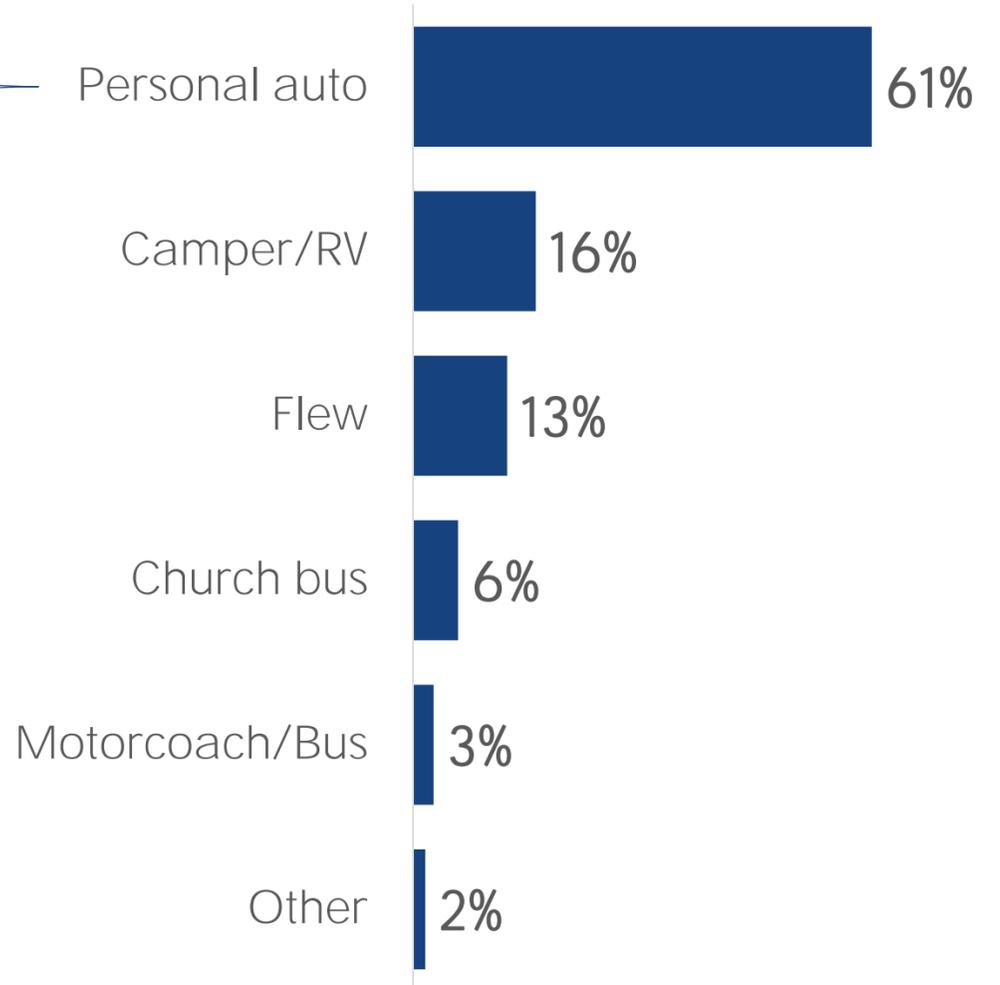
Q16: How did you travel to the Branson/Lakes area on your most recent visit?
Q17: Which airport did you use?

Most visitors say they planned their trips by going directly to the websites of the places they wanted to visit or relying on previous experiences.
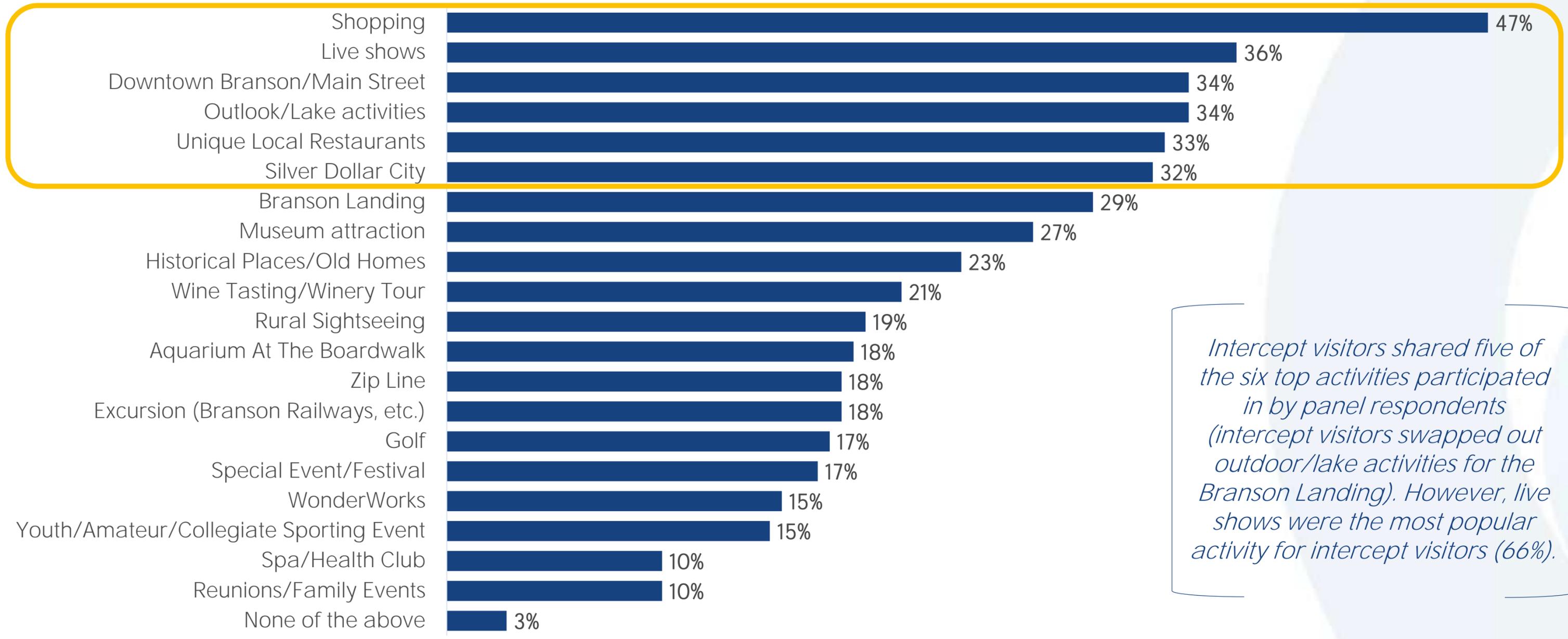
Media Usage in Planning Your Branson Trip

Source	Percentage
Specific website	44%
Previous experience	37%
Online Travel Agency	34%
ExploreBranson.com	34%
Official Branson Vacation Guide	28%
Direct reservation by phone	25%
ReserveBranson.com	20%
Tripster.com	18%
SaveOnBranson.com	16%
Do not recall	6%
Other	3%

Previous experience was the intercept visitor's top source at 48%, followed distantly by the specific websites at 34%.

Q13: Which of the following sources did you use to plan your trip to Branson?

Branson visitors say they are most likely to have shopped, attended live shows, visited downtown and/or one the area lakes on their last visit.

Branson Activities Engaged In

Activity	Percentage
Shopping	47%
Live shows	36%
Downtown Branson/Main Street	34%
Outlook/Lake activities	34%
Unique Local Restaurants	33%
Silver Dollar City	32%
Branson Landing	29%
Museum attraction	27%
Historical Places/Old Homes	23%
Wine Tasting/Winery Tour	21%
Rural Sightseeing	19%
Aquarium At The Boardwalk	18%
Zip Line	18%
Excursion (Branson Railways, etc.)	18%
Golf	17%
Special Event/Festival	17%
WonderWorks	15%
Youth/Amateur/Collegiate Sporting Event	15%
Spa/Health Club	10%
Reunions/Family Events	10%
None of the above	3%

Intercept visitors shared five of the six top activities participated in by panel respondents (intercept visitors swapped out outdoor/lake activities for the Branson Landing). However, live shows were the most popular activity for intercept visitors (66%).

Q18. Did you do any of the following on your most recent visit to the Branson/Lakes area? Please select all that apply.

RESPONDENT BASE: BRANSON VISITORS IN PAST 4 YEARS | N=184

Travelers indicated that of the activities in which they engaged, the functional drivers most responsible for inspiring their trips included Silver Dollar City, live shows/entertainment and shopping.

25%
Silver Dollar City

23%
Live Shows/Entertainment

23%
Shopping

Intercept visitor: *24%*   *55%*   *19%*

Q139 Which of these activities, if any, were among your primary reasons for visiting Branson on this trip? Please select up to your top 3.

RESPONDENT BASE: BRANSON VISITORS WHO ENGAGED IN AREA ACTIVITIES | N=179

The 36% who attended shows in Branson reported visiting 3.5 shows per party. These shows predominantly included live performances or production shows (68%), theme park shows (58%) or dinner shows (52%).

Number of Shows Seen on Last Visit

- 1 Show: 23%
- 2 Shows: 25%
- 3 Shows: 14%
- 4 Shows: 11%
- 5+ Shows: 28%
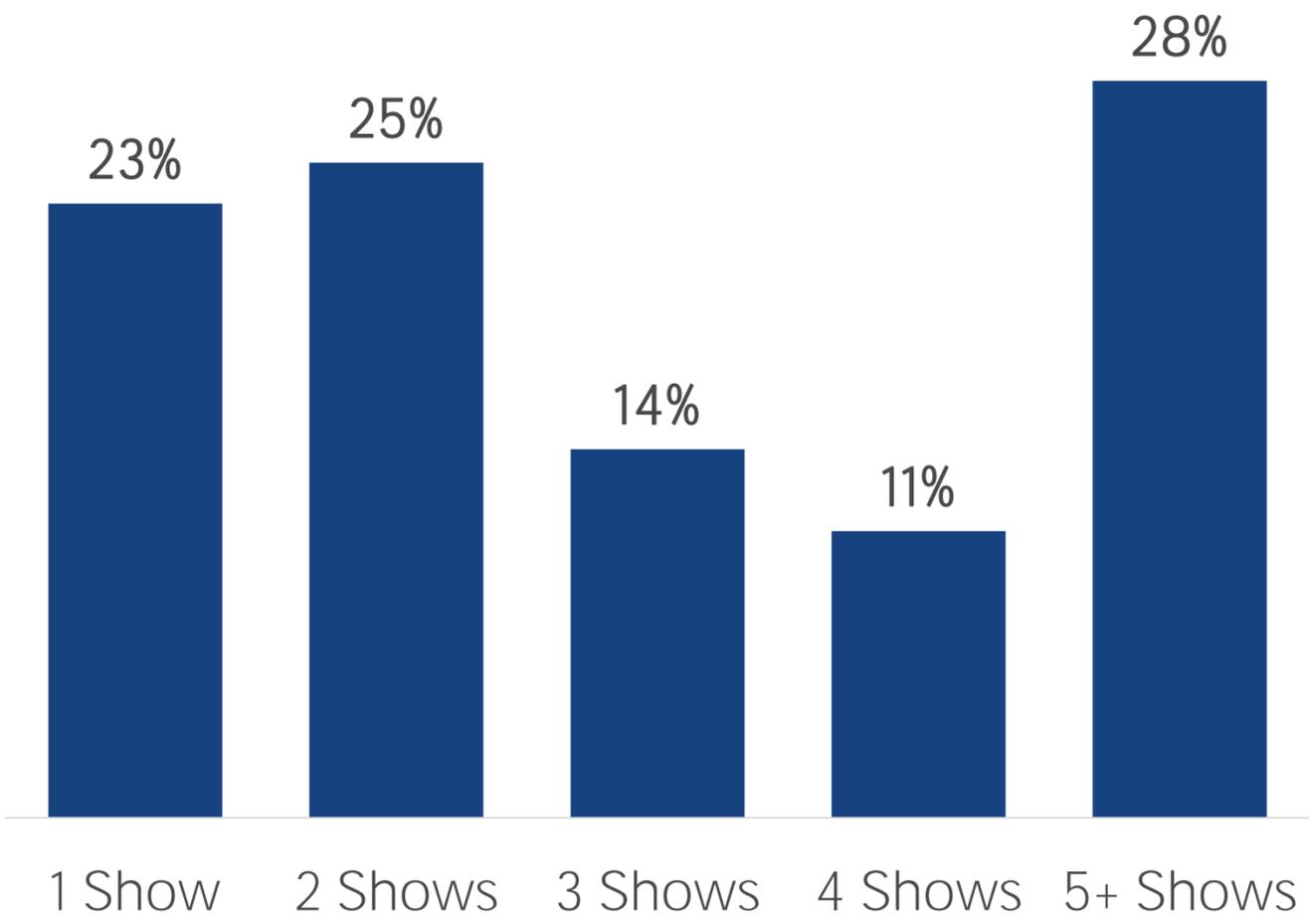
Average: 3.5 Shows per Visitor
Intercept visitor: 3.1

Type of Shows Seen

- Theme or Amusement Park Shows: 13% | 58%
- Dinner Show Productions: 42% | 52%
- Outdoor Light/Fountain/Fireworks Shows: 7% | 45%
- Live Performances or Production Shows in a Branson Theater: 71% | 68%
- Celebrity Show or Concert in a Branson Theater: 26% | 29%
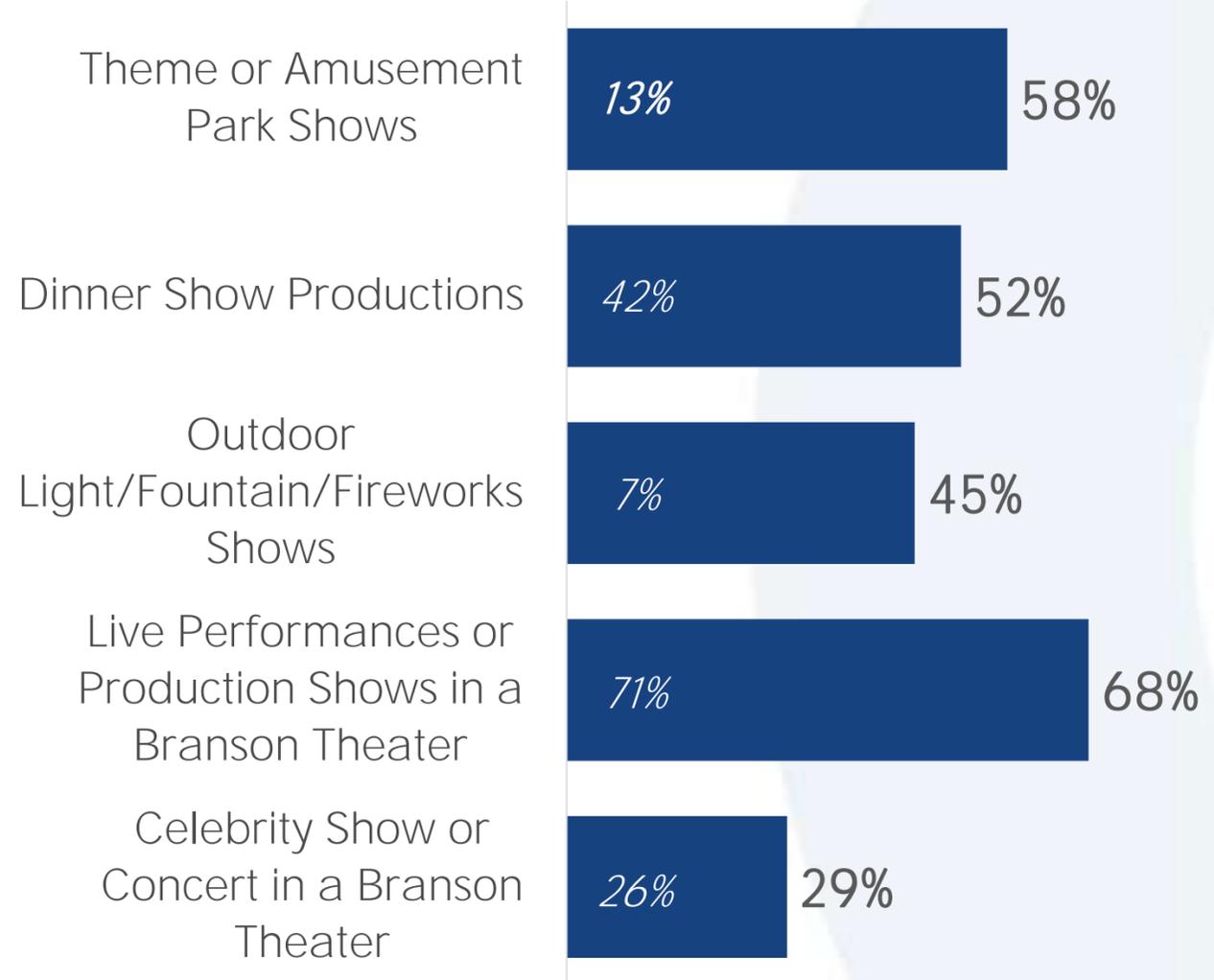
Intercept visitor

Q21: How many live shows, if any, have you seen in Branson over the past 12 months?
Q22: How many of these [PIPE IN # OF SHOWS FROM Q21] would you say fall into the following categories?

RESPONDENT BASE: BRANSON VISITORS WHO SAW SHOWS | N=66

The vast majority of Branson visitors spent the night on their last visit to the area, and they stayed for an average of 4.1 nights.

Spent the Night

84% of intercept visitors spent the night in the area during their most recent visit, averaging 4.0 nights.

4.1 Nights
Avg Length of Stay

96%

Length of Stay

One night	2-3 nights	4-7 nights	8+ nights
12%	42%	38%	7%
8%	*46%*	*40%*	*6%*

Intercept visitor
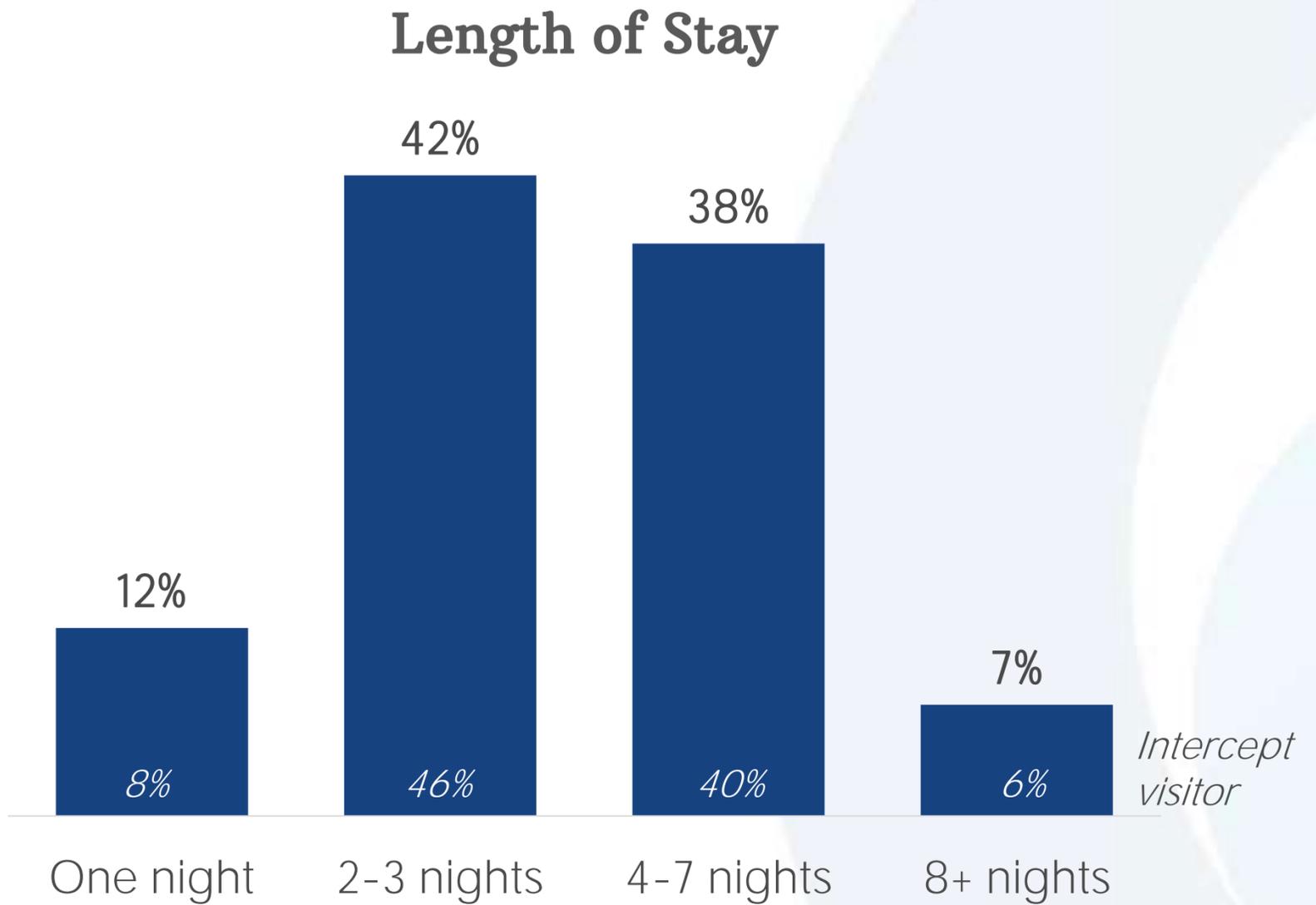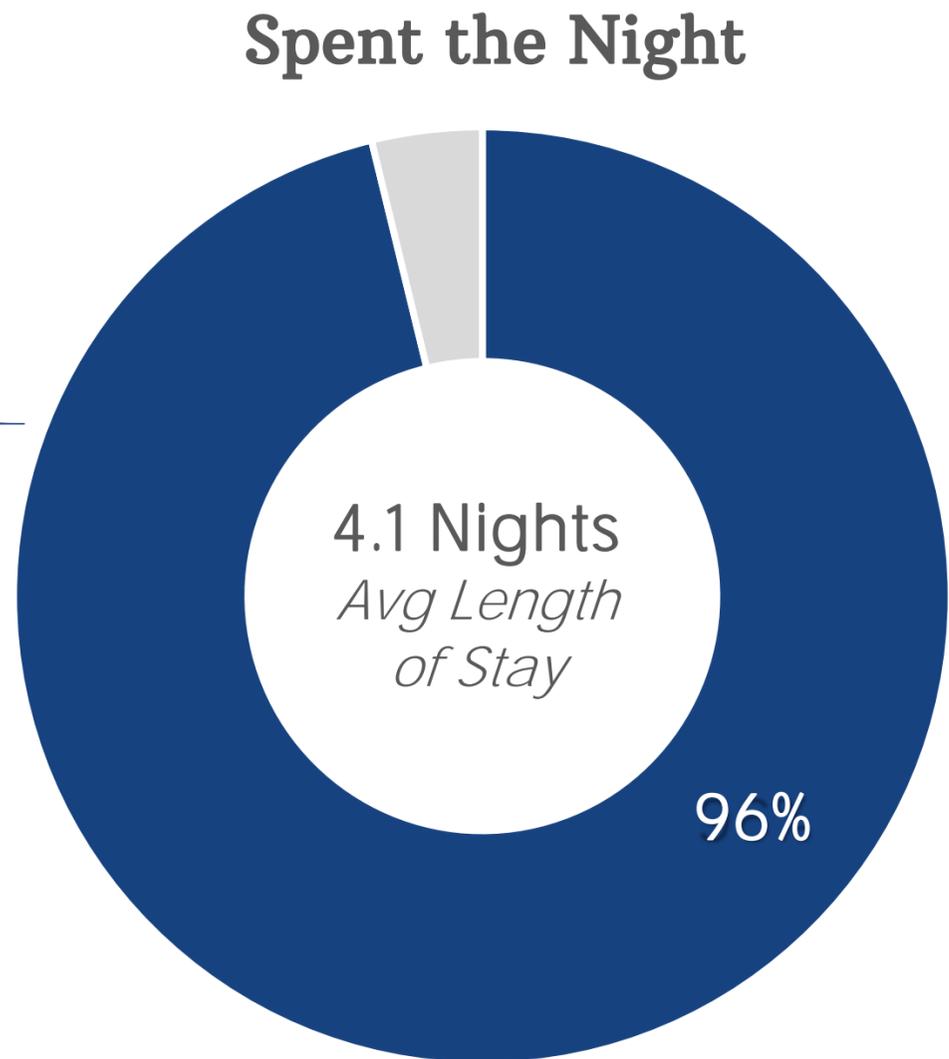
Q24: How many nights did you spend in the Branson/Lakes area on your most recent visit to Branson?

Most Branson visitors report spending the night at an area hotel/resort (33%), but friends/relatives and vacation rentals were also popular choices.

Overnight Accommodations on Last Visit

Hotel/Motel **48%** 33%

Friends/Relatives *2%* 12%

Stayed at a vacation home/2nd home, e.g. VRBO, Airbnb, my own. *12%* 11%

Timeshare Resort *18%* 10%

Lake resort *4%* 10%

Bed & Breakfast *1%* 10%

RV/Camper *6%* 8%

Condo *9%* 6%

Intercept visitor

Q25. In what type of accommodations did you stay on this visit?
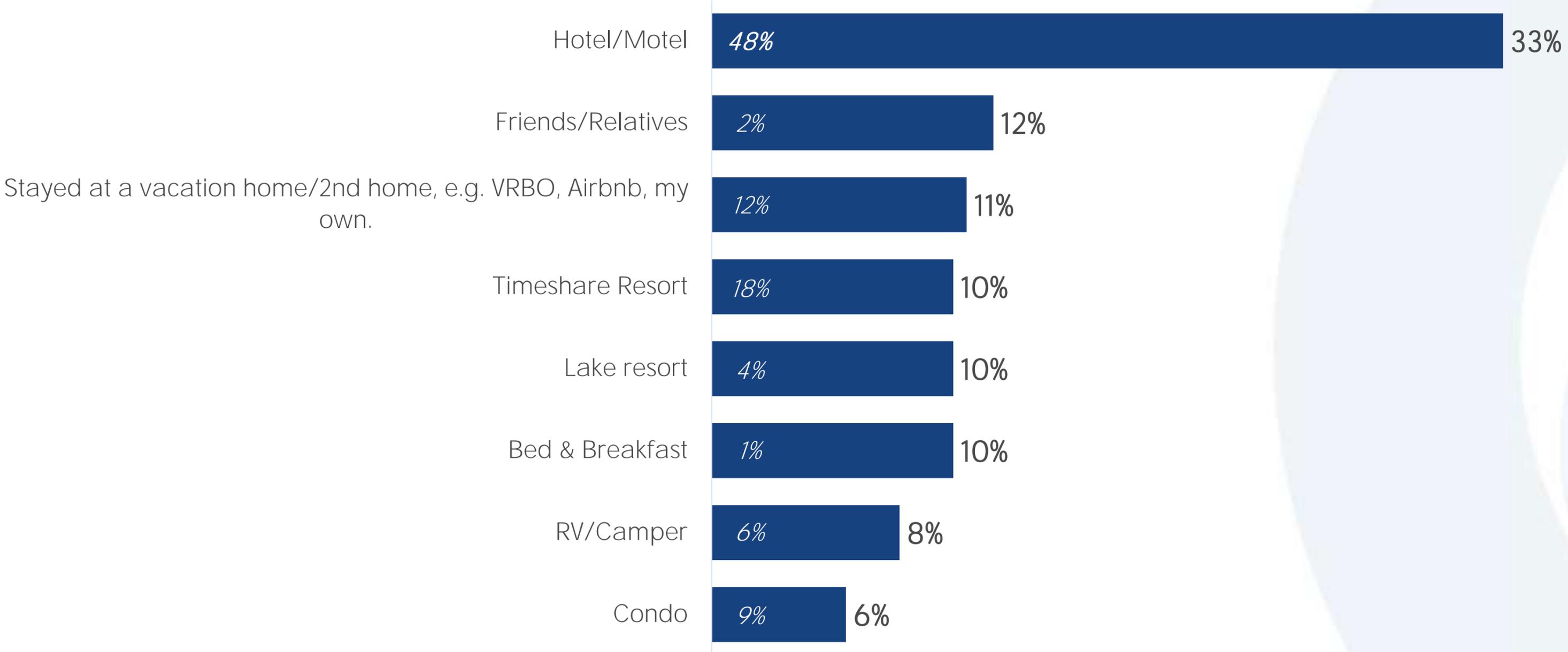
Branson visitors report spending an average of $1,006 on their last visit, a number that equates to $444 per person and/or $109 per person per day.

Party Trip Spending
$1,006

Per Person Trip Spending
$444 or
$109 per person per day

Q36: Approximately how much money did your party spend on lodging, food, entertainment, shopping and other activities in the Branson area on this trip – not including travel expenses to and from Branson?

RESPONDENT BASE: BRANSON VISITORS IN PAST 4 YEARS | N=184

Nearly nine in ten Branson visitors indicated they will definitely/probably return to Branson again in the next 12 months.

Intent to Return to Branson in Next 12 Months
% Probably/Definitely Will

Intercept visitors are extremely likely to visit Branson again (89%). However, when asked when that return visit would occur, only 34% indicated that they would return within the next year.

86%
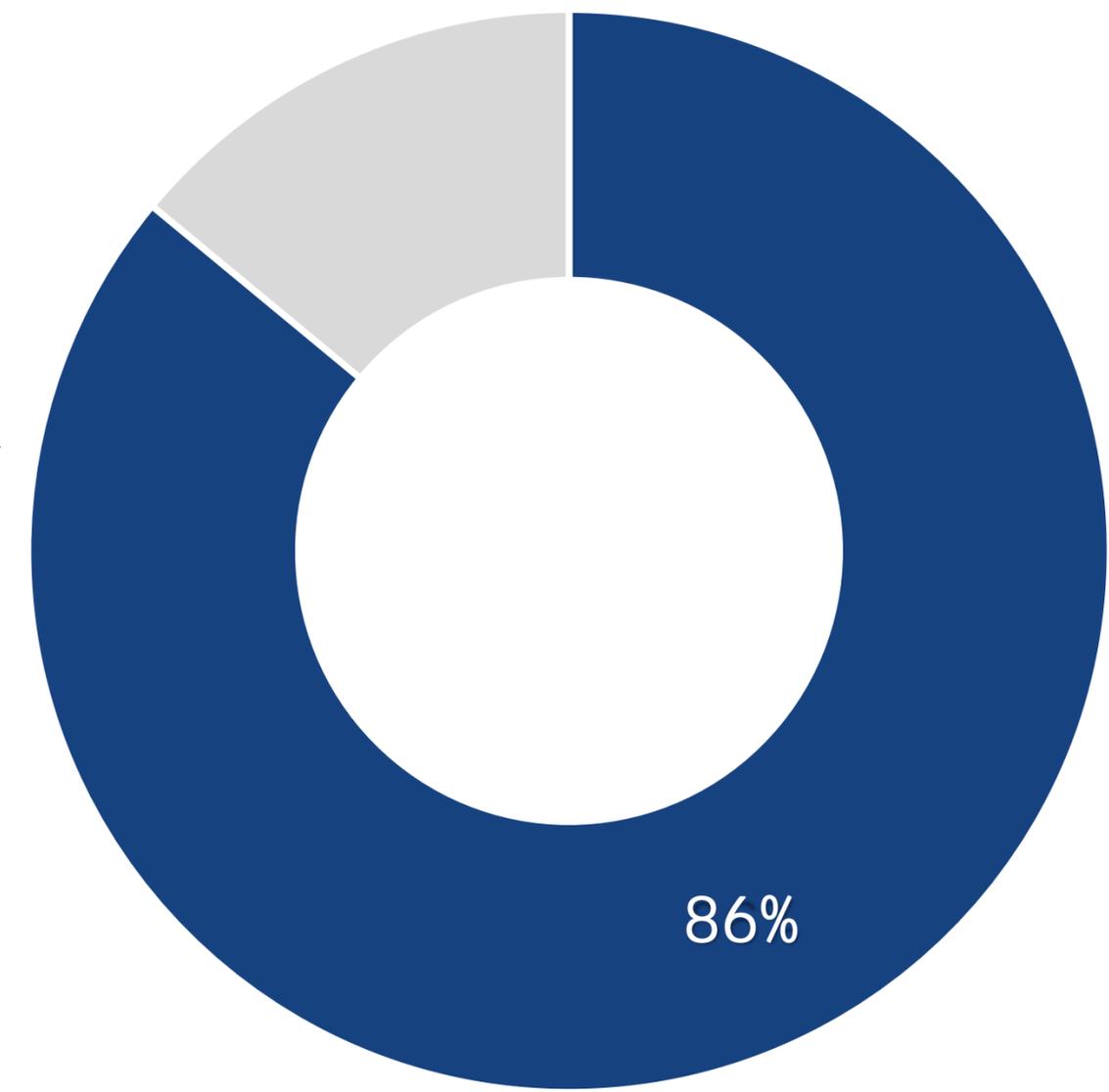
Q34: Please indicate how likely you are to return to the Branson/Lakes area? (5-point scale)

Visitor & Target Market Demographics

Given the new methodology, it is now possible to explore the demographics of Branson's recent AND lapsed visitors, as well as travelers who have not visited Branson.

	Recent Visitors	Lapsed Visitors	Non-Visitors
Average Visitor Adult Age	43.7	46.8	43.9
% Under 12	14%	16%	17%
% 12-17	9%	10%	7%
% 18-34	31%	27%	30%
% 35-54	24%	17%	23%
% 55+	22%	30%	23%
Families	62%	63%	38%
Adults	38%	37%	62%
HH Income	$95.9k	$98.5k	$83.3k
Avg Distance Traveled	345	370	444

Q26: Including yourself, how many members of your traveling party fit into the following age groups?
Q45: Including yourself, how many members of your traveling party fit into the following age groups?
Q68: Which of the following ranges best approximates your annual household income before taxes?
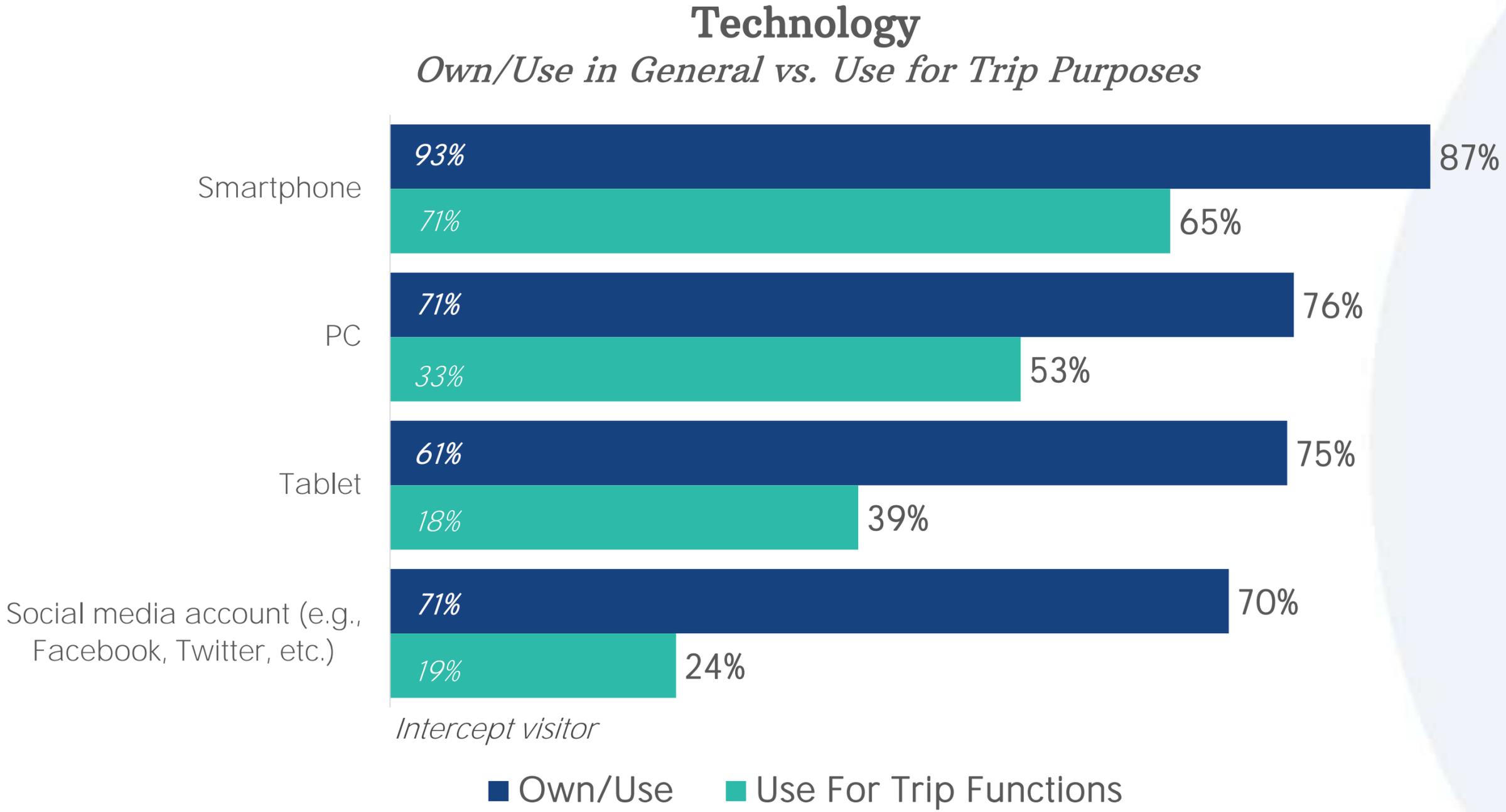Q64: What is your 5-digit home zip code?

While roughly one-third of Branson visitors say they did not consider visiting any other destination, Kansas City, St. Louis and Pigeon Forge were among the top destinations among those who did.

Destinations Considered When Planning Branson Trip

None of the above: 37%

Destination	%
Kansas City, Missouri	39%
St. Louis, Missouri	36%
Pigeon Forge, Tennessee	22%
Myrtle Beach, South Carolina	20%
Destin, Florida	20%
Gulf Shores, Alabama	15%
Wisconsin Dells, Wisconsin	15%
Asheville, North Carolina	14%
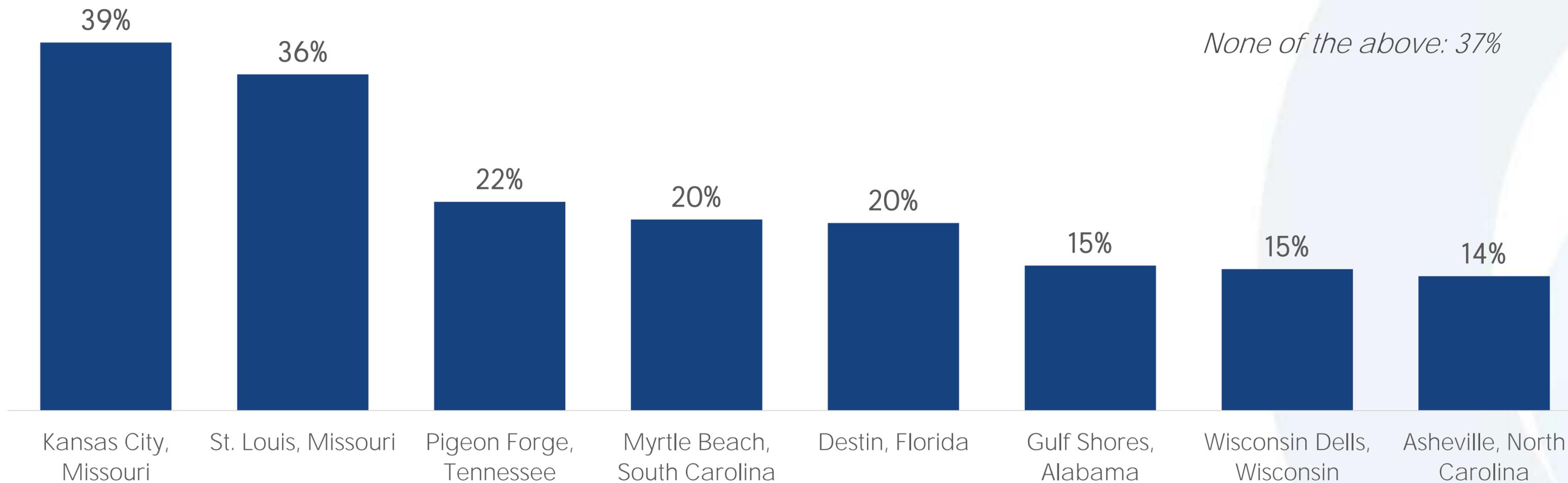
Q7: When making your decision to visit Branson the last time you traveled there, which other destinations (if any) did you also consider? Please select all that apply.

Most Branson visitors own or use a smartphone (87%) and most say they used it for trip functions during their last visit to Branson (65%).

Technology

Own/Use in General vs. Use for Trip Purposes

Smartphone
- 93% / 87%
- 71% / 65%

PC
- 71% / 76%
- 33% / 53%

Tablet
- 61% / 75%
- 18% / 39%

Social media account (e.g., Facebook, Twitter, etc.)
- 71% / 70%
- 19% / 24%

Intercept visitor

■ Own/Use   ■ Use For Trip Functions

Q37: Which of the following do you own, use or do: Please select all that apply.
Q38: Did you use this technology for trip specific functions (booking reservations, buying tickets, posting photos, etc.)? Please select all that apply.

Branson visitors who use social media are most likely to have visited Branson's Facebook, YouTube and Instagram pages.

Branson Social Media Usage

	Facebook	YouTube	Instagram	Twitter	TikTok	Pinterest	Snapchat	I do not follow Branson on social media	None of the above
	50%	47%	43%	39%	25%	24%	23%	19%	15%
Intercept visitor	*38%*	*10%*	*5%*	*1%*	*1%*	*2%*	*1%*	*29%*	*0%*
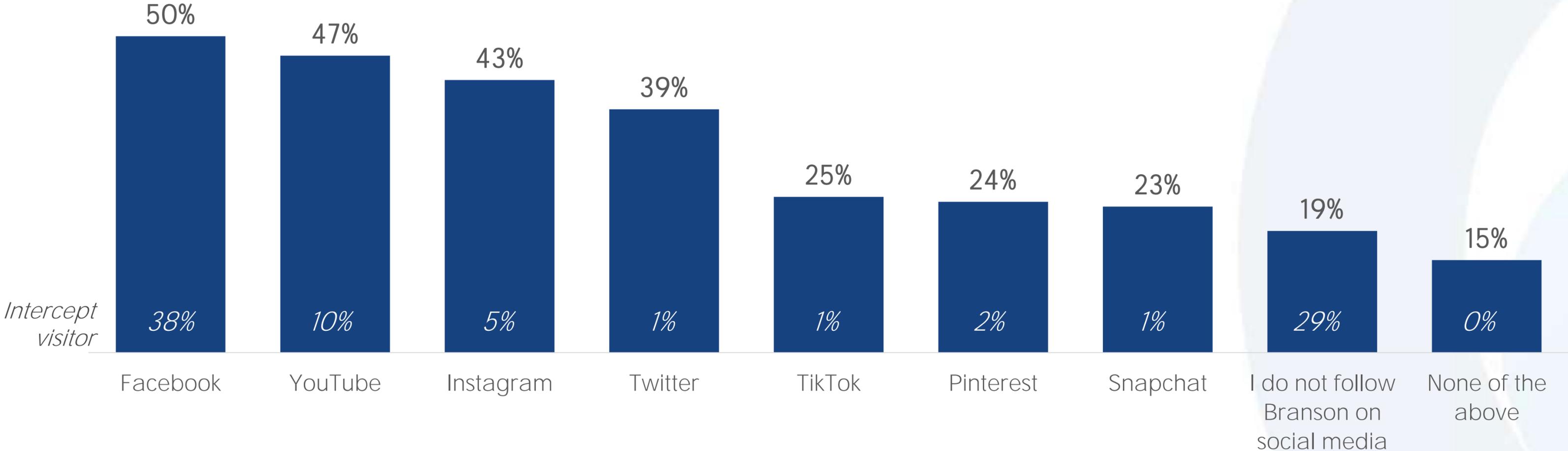
Q39: In the past year have you visited any of Branson's social media channels listed below? Please select all that apply.

Visitors report that they were most likely to have been influenced by a Branson television ad, online video or an online search for information.

Most Influential Media Source

Source	Intercept visitor	Value
Saw a TV commercial	4%	14%
Info on Smartphone/Tablet	24%	9%
Online Video	1%	9%
Searched Online for Info	20%	9%
Friend's Social Media Conversation	1%	7%
Info Gathered on PC	17%	7%
Shared Branson Vacation Guide	1%	7%
Explore Branson Facebook	3%	6%
Discussions with Friends	20%	5%
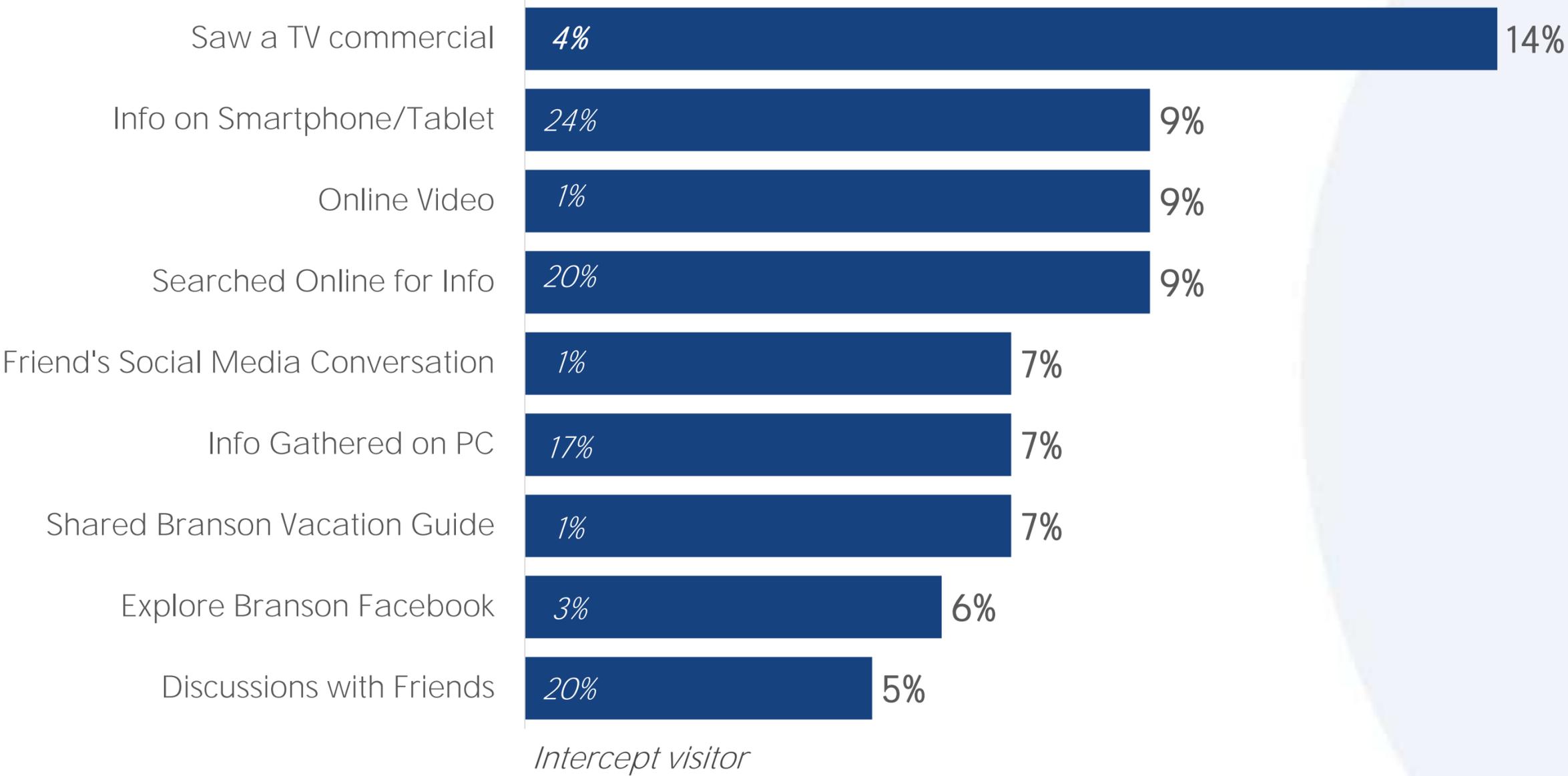
Intercept visitor

Q41: Which of the following sources was most influential in your decision to visit Branson?

Gen Pop (Visitors within past 4 years) vs Intercept Results Differences

KPI	Gen Pop Panel Visitor	Intercept Visitor	Variance
Leisure	57% | Ranks 1st	91% | Ranks 1st	Different, but same rank
Business	9% | Ranks 4th	1% | Ranks 5th	Different, but similar rank
First-Time	12%	19%	Similar
Repeat	88%	81%	Similar
Length of Stay	4.1 nights	4.0 nights	Similar
Spending (Party | PPPD)	$1,006 | $110	$1,130 | $87	Similar
Families with Children	62%	29%	Different
Adult Parties	38%	71%	Different
Average Age	45 years	57 years	Different
Avg Household Income	$96.8k	$88.8k	Different
Shopping	47% | Ranks 1st	59% | Ranks 2nd	Similar
Live Shows	36% | Ranks 2nd	66% | Ranks 1st	Different, but similar rank
Outdoor Recreation	34% | Ranks 3rd	17% | Ranks 9th	Different, and different rank
Silver Dollar City	32% | Ranks 6th	28% | Ranks 6th	Similar, and same rank
Avg # Shows	3.5 shows	3.1 shows	Similar
Intent to Return	86%	89%	Similar

Unsurprisingly, different methodologies, different capture locations, and different timing of the survey deliver somewhat different results which is no surprise. But, while age and party composition is very different, visitor behavior is contextually similar.

Branson 2021 Visitor Profile Research

Non-Visitors

More than nine in ten Branson Non-Visitors took at least one leisure trip in the past two years, and the top destinations of those trips were Florida, Texas and California.
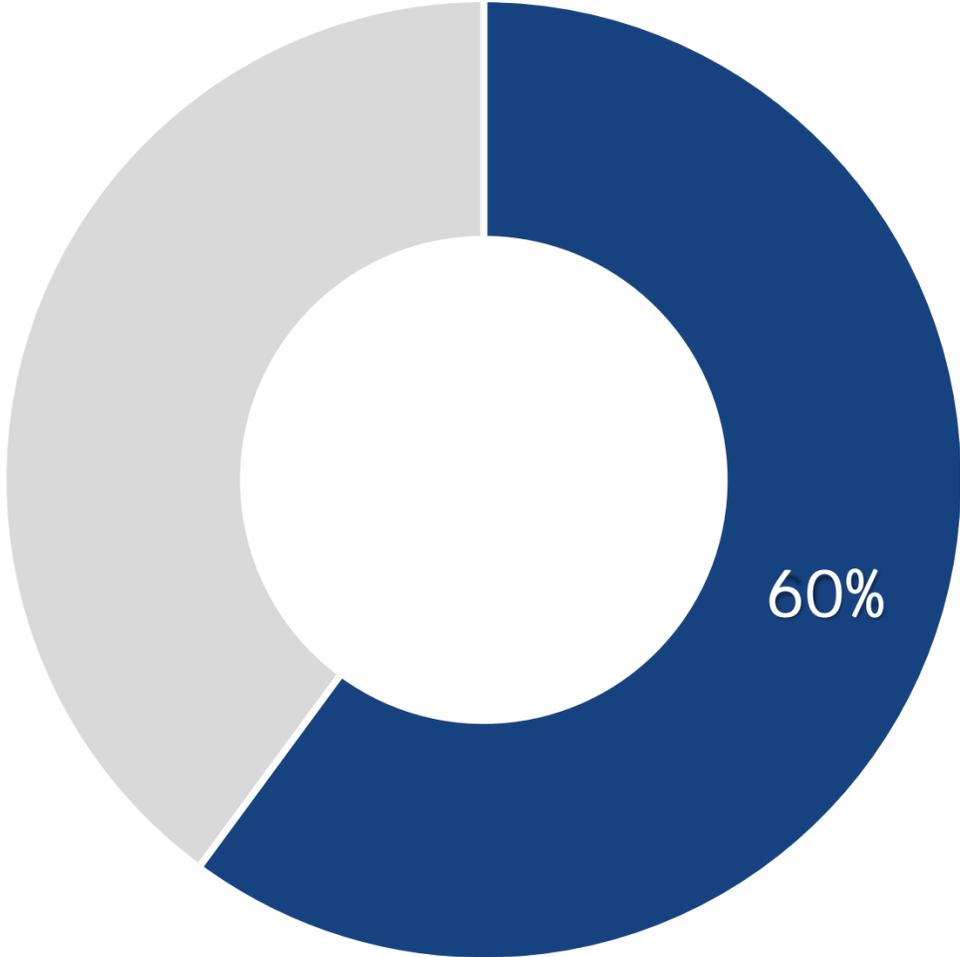
Last Leisure Trip Destination

Florida	Texas	California	Illinois	Missouri	Georgia
13.9%	11.3%	6.4%	5.8%	4.8%	4.6%
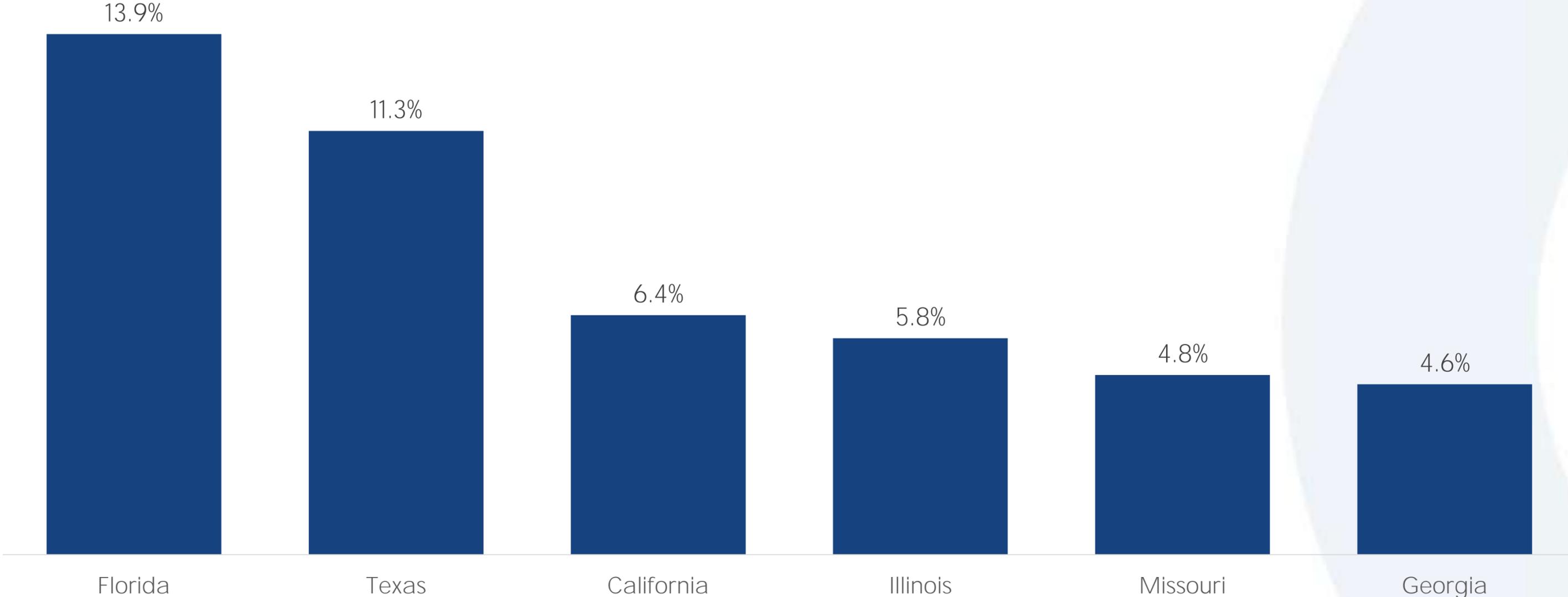
Q44: Where did you go on your last leisure trip of more than 50 miles from home?

Branson has a positive reputation among Non-Visitors, but just not as positive as other destinations in the comp set.

Branson's Reputation
% Somewhat/Very positive opinion
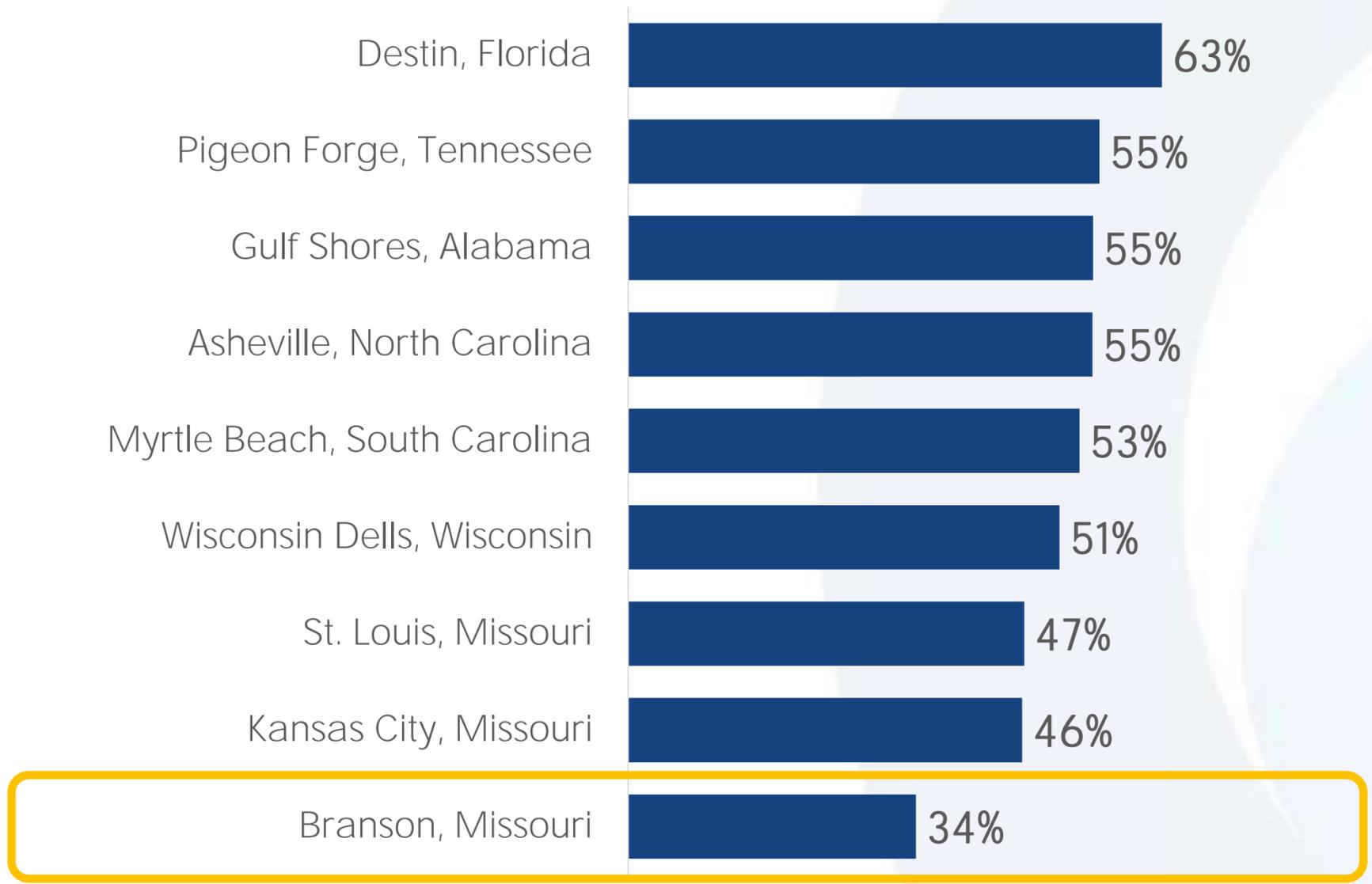
60%

Reputation Among the Competitive Set

Destin, Florida	75%
Wisconsin Dells, Wisconsin	73%
Pigeon Forge, Tennessee	73%
Gulf Shores, Alabama	72%
Asheville, North Carolina	69%
Myrtle Beach, South Carolina	69%
Kansas City, Missouri	62%
St. Louis, Missouri	61%
Branson, Missouri	60%

Competitive Set Average: 68%
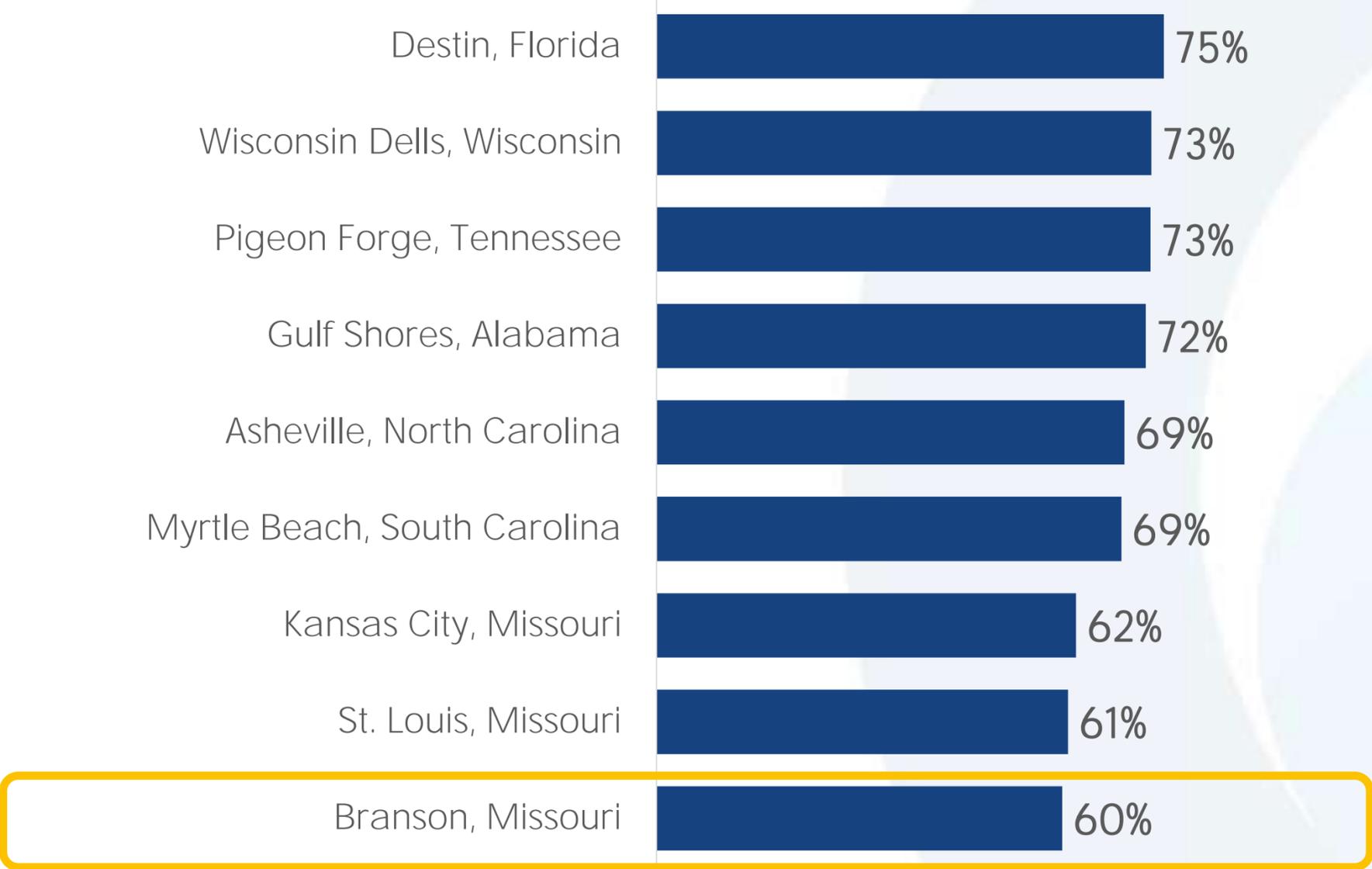
Q46: Please indicate to what degree your opinion of these destinations is positive or negative. (5-point scale)

RESPONDENT BASE: BRANSON NON-VISITORS | N = 734

More than one-third of Non-Visitors indicate they have an interest in visiting Branson. But once again, this trails other destinations in the competitive set.

Interest in Visiting Branson
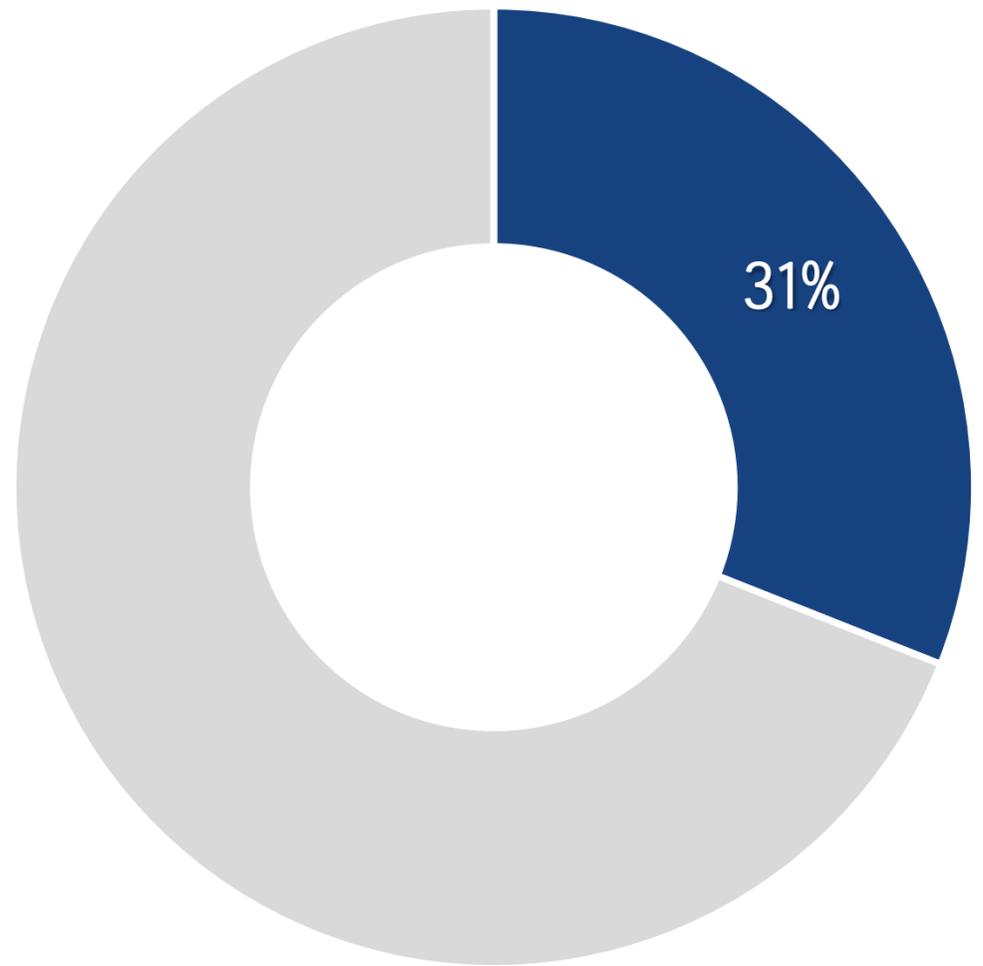### *% Somewhat/Very Interested*
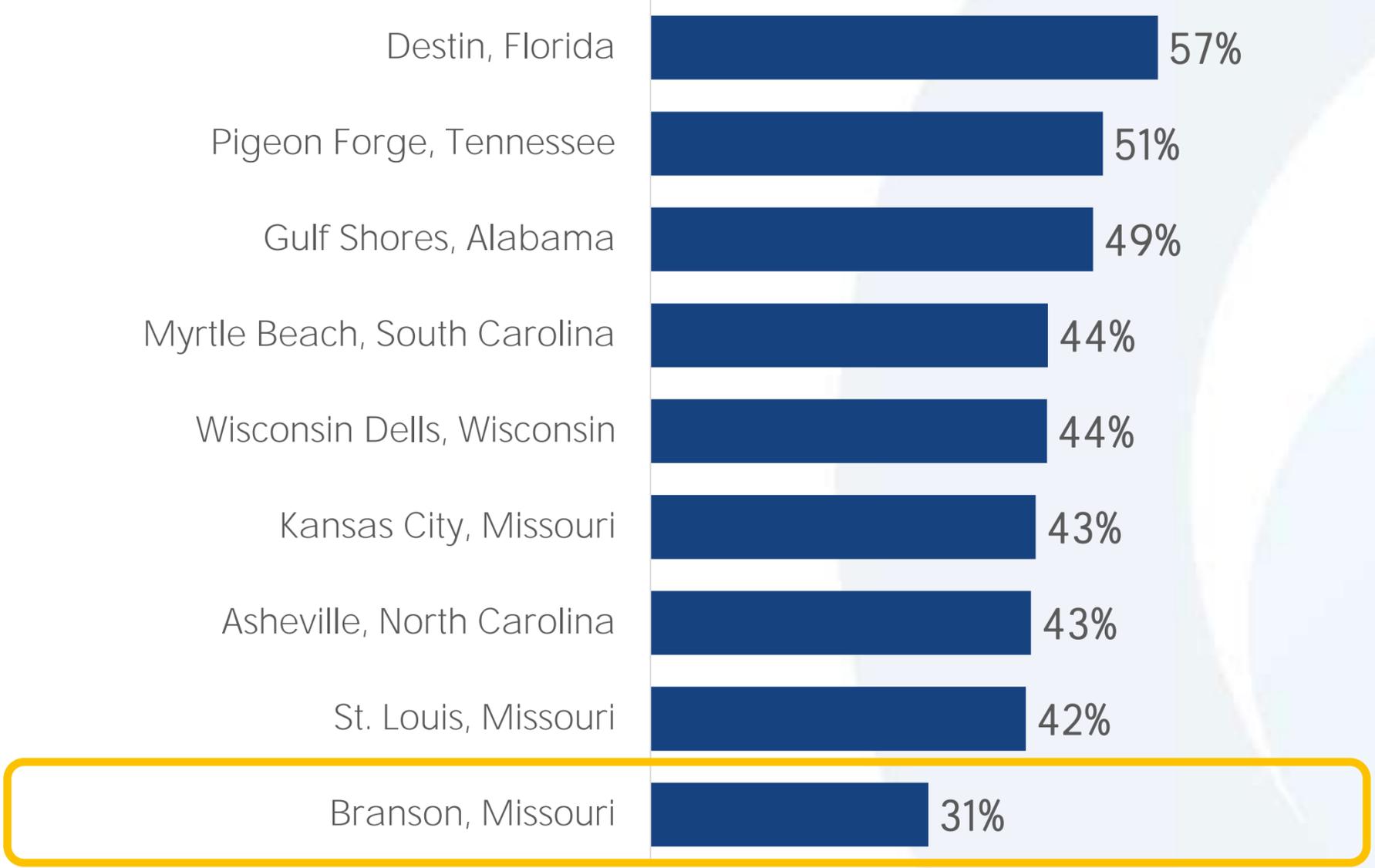
34%

Interest in Visiting Competitive Set

Destination	Percent
Destin, Florida	63%
Pigeon Forge, Tennessee	55%
Gulf Shores, Alabama	55%
Asheville, North Carolina	55%
Myrtle Beach, South Carolina	53%
Wisconsin Dells, Wisconsin	51%
St. Louis, Missouri	47%
Kansas City, Missouri	46%
Branson, Missouri	34%

Competitive Set Average: 51%
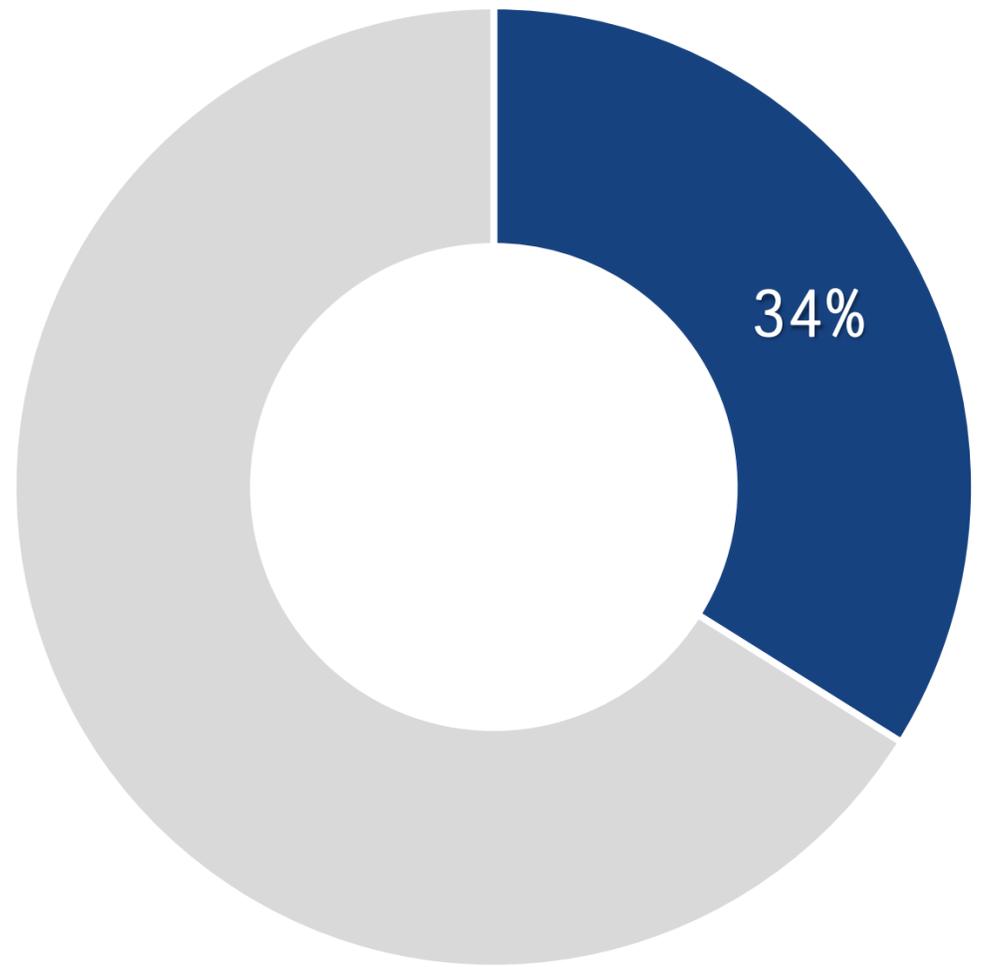
Q47: Please indicate how interested you are in visiting each of the following destinations in the next 3 years. (5-point scale)

One-third of Non-Visitors indicate they will definitely, or at least probably, visit Branson. But this too falls behind the other destinations.

Intent to Visit Branson
% Probably/Definitely Will

31%

Interest in Visiting Competitive Set

Destin, Florida	57%
Pigeon Forge, Tennessee	51%
Gulf Shores, Alabama	49%
Myrtle Beach, South Carolina	44%
Wisconsin Dells, Wisconsin	44%
Kansas City, Missouri	43%
Asheville, North Carolina	43%
St. Louis, Missouri	42%
Branson, Missouri	31%

Competitive Set Average: 45%

Q48: Please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-point scale)

Non-Visitors heavily associate country music with live Branson shows. Western, Old and Folk music are also relevant associations

Q53: What types of music would you expect Branson to feature it its theaters?

RESPONDENT BASE: BRANSON NON-VISITORS | N = 734

Non-Visitors assume they would find country music shows, original music and music festivals, along with hillbilly/cheesy entertainment and comedy shows in Branson.

Types of Shows Expect to Find in Branson

Country Music Shows	65%
Original Music	63%
Music Festival(s)	61%
Hillbilly/Cheesy Entertainment	60%
Comedy Shows	59%
Prominent Local/Regional Arts	57%
Nightlife/Dance Scene	56%
Featured Artists who have had Top 100 hits	54%
Magic Shows	53%
Rock & Roll Shows	53%
Prominent National Celebrities	51%
Animal Shows	47%

Q54. Using the scale provided, please indicate the degree to which you would expect Branson to feature the following types of shows. Please select all that apply.

RESPONDENT BASE: BRANSON NON-VISITORS | N = 734

Non-Visitors say the biggest barriers to visiting Branson is that they have other places they prefer to visit, Branson has not been recommended to them and/or they don't know enough about Branson to make an informed decision.

Stated Barriers to Visiting Branson
% Agree/Strongly Agree

Barrier	%
Prefer visiting other destinations	59%
No one has recommended Branson to me	49%
Don't know enough about Branson to make informed decision	47%
Not a big fan of country music	46%
Not interested/Not for me	44%
My perception of the quality of the experience is not prefered	43%
Didn't see any advertisements sharing what was new in the area	43%
Not seen my friends discussing Branson on social media	41%
A bit too cheesy/hillbilly for our liking	40%
Personal Issues (health, walking, etc.)	35%
Just for old people	34%
Kids too young/too old	32%
Online travel reviews I read were not particularly flattering	32%

Q60: Please rate how strongly you agree or disagree with the following reasons for why you have not visited Branson, MO recently. (5-point scale)

RESPONDENT BASE: OVERALL – NON-VISITORS | N=734

Derived barriers or those attributes correlated most closely with low interest reveal that non-visitors are not interested, prefer other destinations or feel Branson is just a bit too cheesy/hillbilly for their liking.

STATED BARRIERS

1. Prefer visiting other destinations
2. No one has recommended Branson to me
3. Don't know enough about Branson to make informed decision
4. Not a big fan of country music
5. Not interested/Not for me
6. My perception of the quality of the experience is not why we typically prefer
7. Didn't see any advertisements sharing what was new in the area
8. Not seen my friends discussing Branson on social media
9. A bit too cheesy/hillbilly for our liking
10. Personal Issues (health, walking, etc.)

DERIVED BARRIERS

1. Not interested/Not for me
2. Prefer visiting other destinations
3. A bit too cheesy/hillbilly for our liking
4. My perception of the quality of the experience is not why we typically prefer
5. Not a big fan of country music
6. No one has recommended Branson to me
7. Didn't see any advertisements sharing what was new in the area
8. Not seen my friends discussing Branson on social media
9. Just for old people
10. Online travel reviews I read were not particularly flattering

Q60: Please rate how strongly you agree or disagree with the following reasons for why you have not visited Branson, MO recently. (5-point scale)
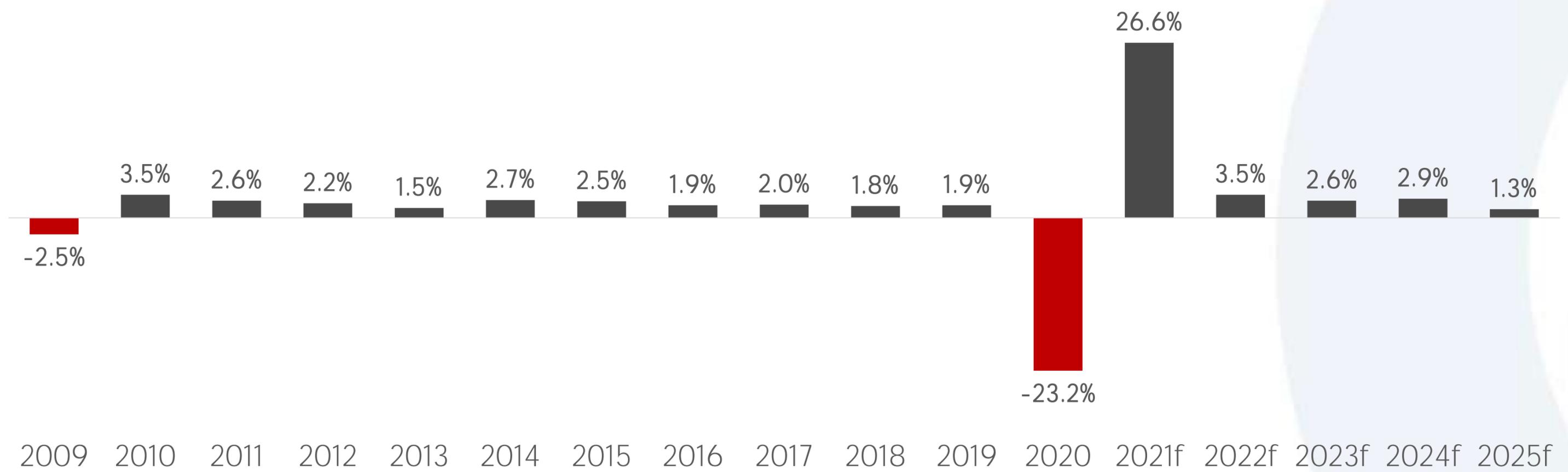
RESPONDENT BASE: OVERALL – NON-VISITORS | N=734

Lapsed visitors say the reason they haven't returned is that they prefer visiting other destinations or that there is nothing new of interest they feel they must see in Branson.

Stated Hurdles to Returning to Branson
% Agree/Strongly Agree

Hurdle	%
Prefer visiting other destinations	61%
Nothing new of interest that we feel are must see	43%
Price/Affordability	29%
Personal Issues (health, walking, etc.)	27%
It seldom, if ever, seems to change much	27%
Not interested/Not for me	26%
A bit too cheesy/hillbilly for our liking	23%
Not a big fan of country music	22%
Kids too young/too old	16%

Q59: Please rate how strongly you agree or disagree with the following reasons for why you have not visited Branson, MO recently. (5-point scale)

RESPONDENT BASE: OVERALL – VISITED BRANSON OVER 4 YEARS AGO | N=82

Branson 2021 Visitor Profile Research

Appendix

The U.S. Travel Association forecasts that leisure travel fell 23.2% in 2020 and is forecast to have rebound by 26.6% in 2021. Looking forward to 2022, they are forecasting a +3.5% increase in leisure travel with a +2.6% increase again in 2023.

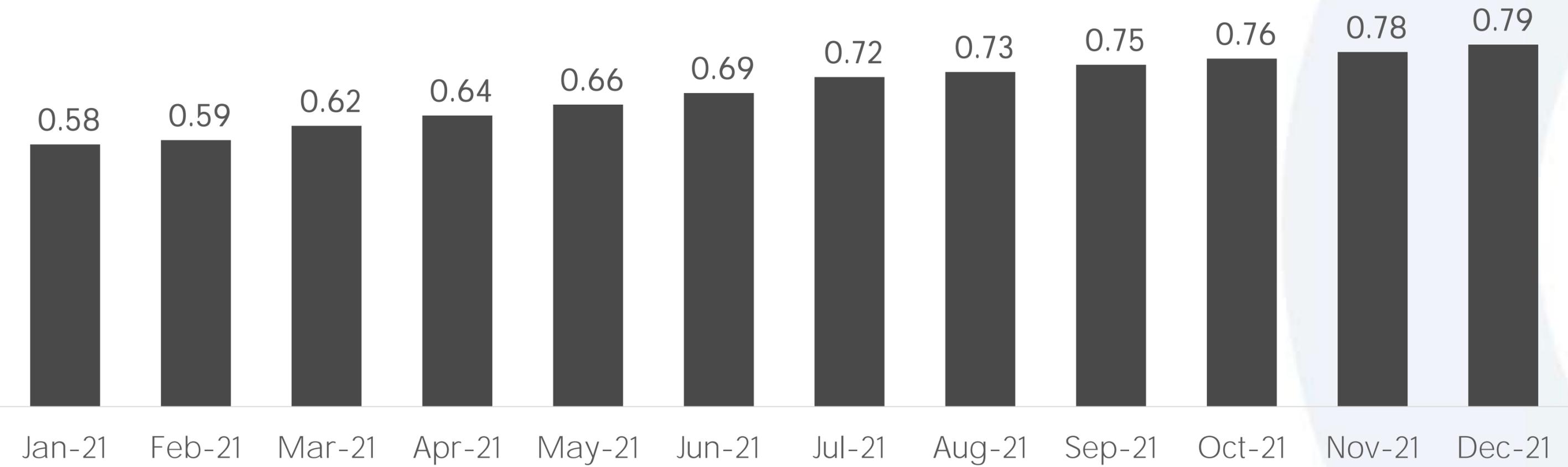## USTA Domestic Leisure Travel Forecast

Year	Value
2009	-2.5%
2010	3.5%
2011	2.6%
2012	2.2%
2013	1.5%
2014	2.7%
2015	2.5%
2016	1.9%
2017	2.0%
2018	1.8%
2019	1.9%
2020	-23.2%
2021f	26.6%
2022f	3.5%
2023f	2.6%
2024f	2.9%
2025f	1.3%

Business travel has experienced more of a roller coaster ride. After falling by 67.5% in 2020, business travel is projected to have increased by 55.2% in 2021 and is expected to experience another +51.6% increase in 2022 followed by a +22.2% increase in 2023.

USTA Domestic Business Travel Forecast
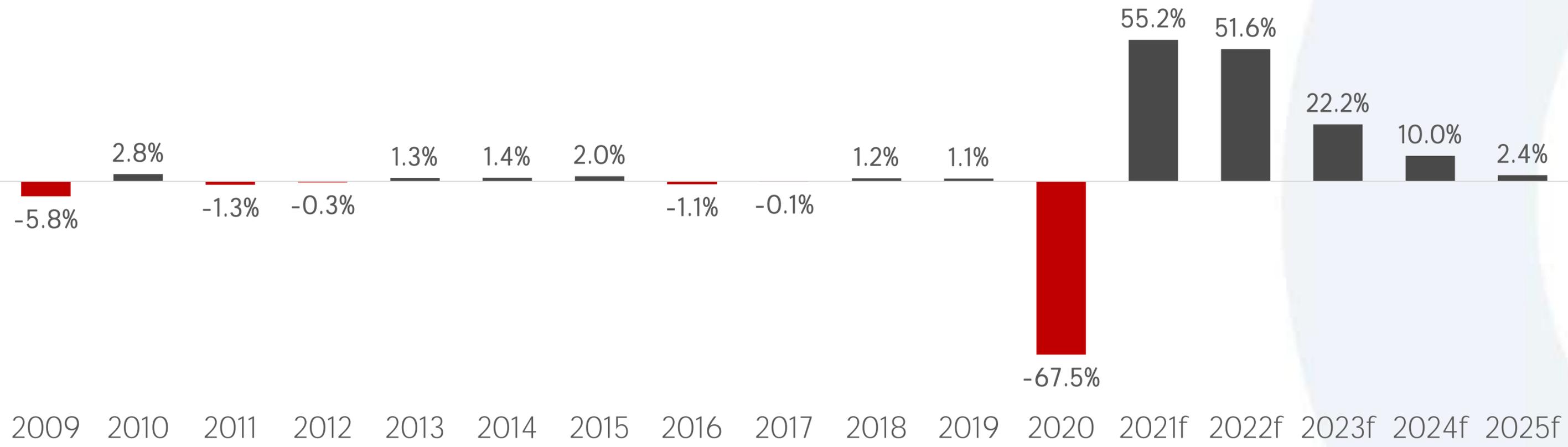
In 2021, the U.S. Travel Association projects that gross travel revenues reached 79% of the level they were at in December of 2019, representing a $240 billion decline. Thus, while a clear and present rebound is occurring, the U.S. has still not returned to pre-pandemic levels of travel spending.

2021 Gross Travel Revenues by Month as a % of 2019

Month	Value
Jan-21	0.58
Feb-21	0.59
Mar-21	0.62
Apr-21	0.64
May-21	0.66
Jun-21	0.69
Jul-21	0.72
Aug-21	0.73
Sep-21	0.75
Oct-21	0.76
Nov-21	0.78
Dec-21	0.79

Domestic Leisure Travel Spending
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	% recovered	Spending
2019	100	$722B
2020	77	$555B
2021	97	$702B
2022	101	$726B
2023	103	$745B
2024	106	$766B
2025	108	$776B

■ % recovered relative to 2019   ■ Spending (in $ billions)
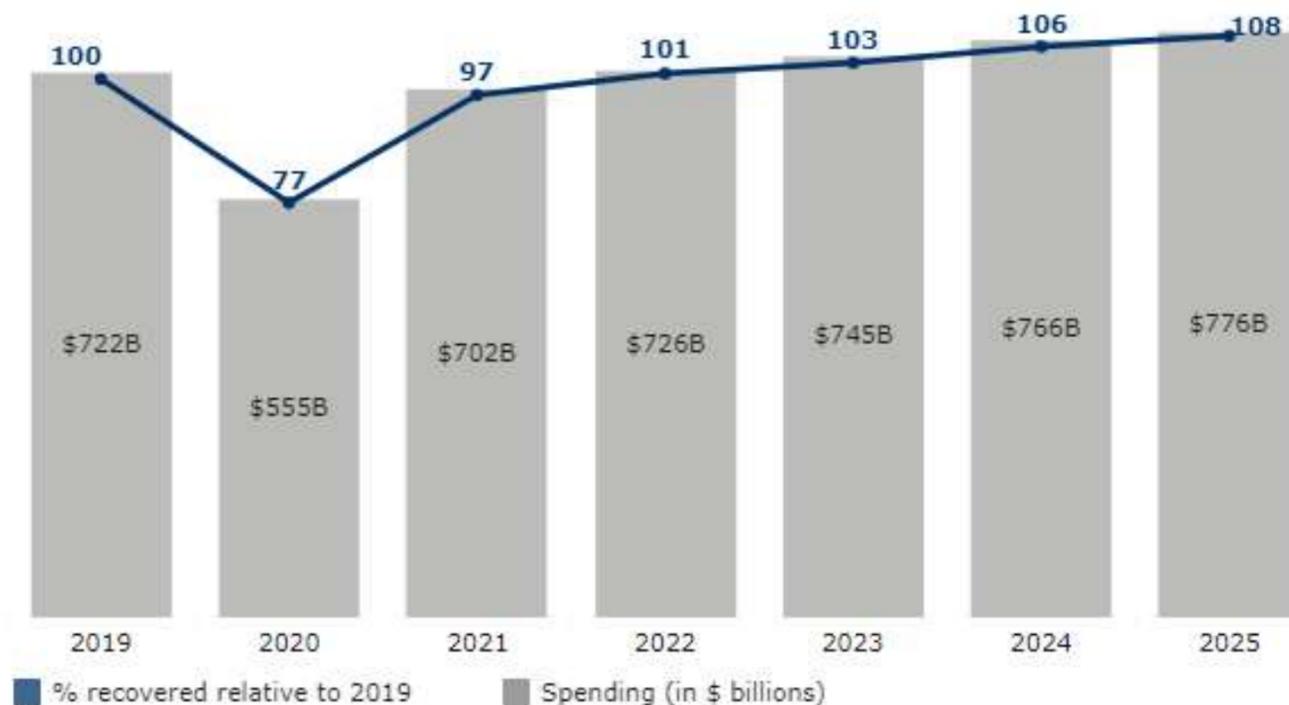
Domestic Business Travel Spending
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	% recovered	Spending
2019	100	$270B
2020	32	$88B
2021	50	$136B
2022	76	$206B
2023	93	$252B
2024	103	$277B
2025	105	$284B

■ % recovered relative to 2019   ■ Spending (in $ billions)
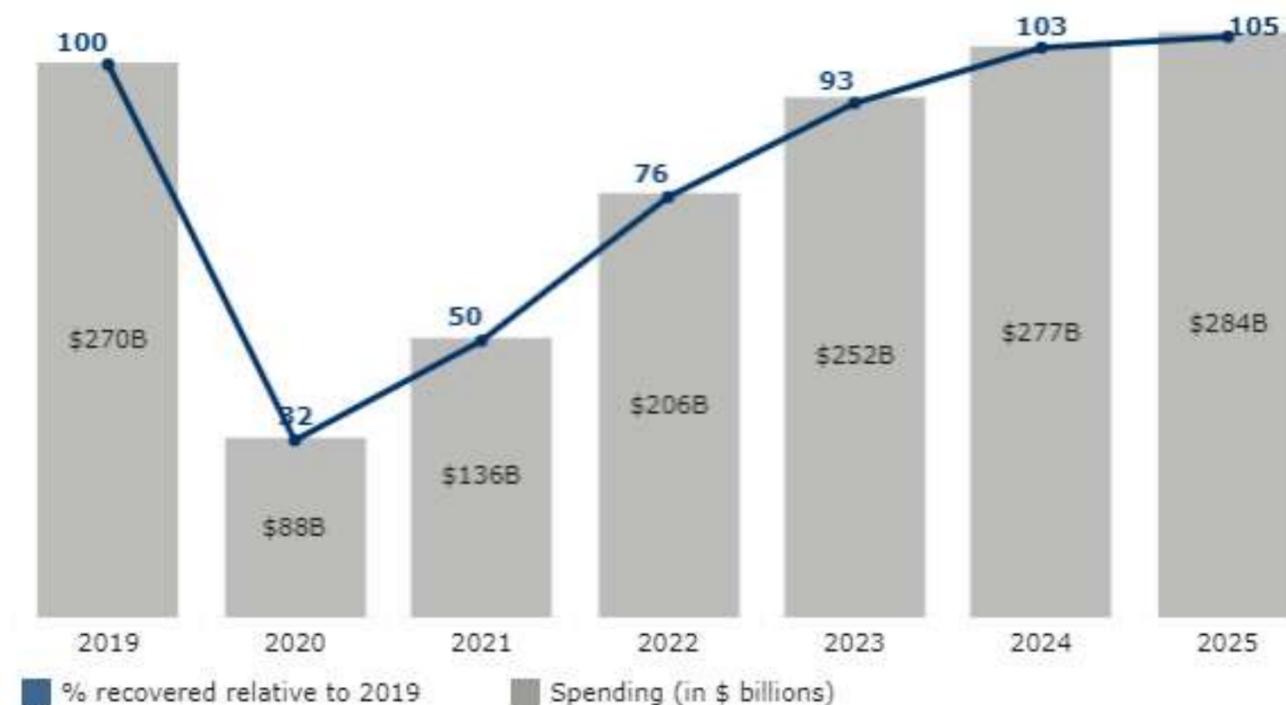
Domestic Auto vs. Air Travel Volume
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	Auto	Air
2020	71	42
2021	89	70
2022	97	88
2023	104	100
2024	107	109
2025	109	113

■ Auto ■ Air
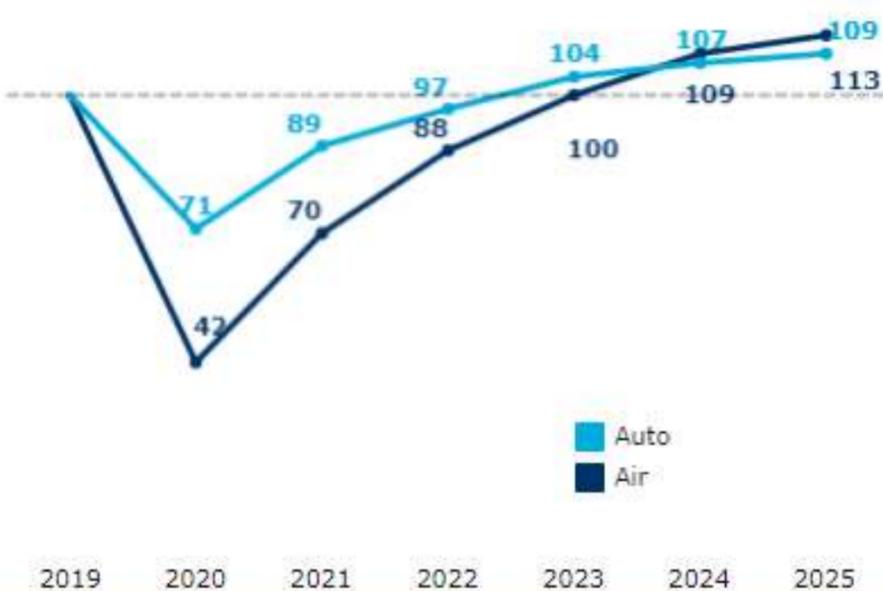
Domestic Leisure vs. Business Travel Volume
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	Leisure	Business
2020	76	39
2021	96	54
2022	101	80
2023	105	96
2024	108	104
2025	110	106

■ Leisure ■ Business
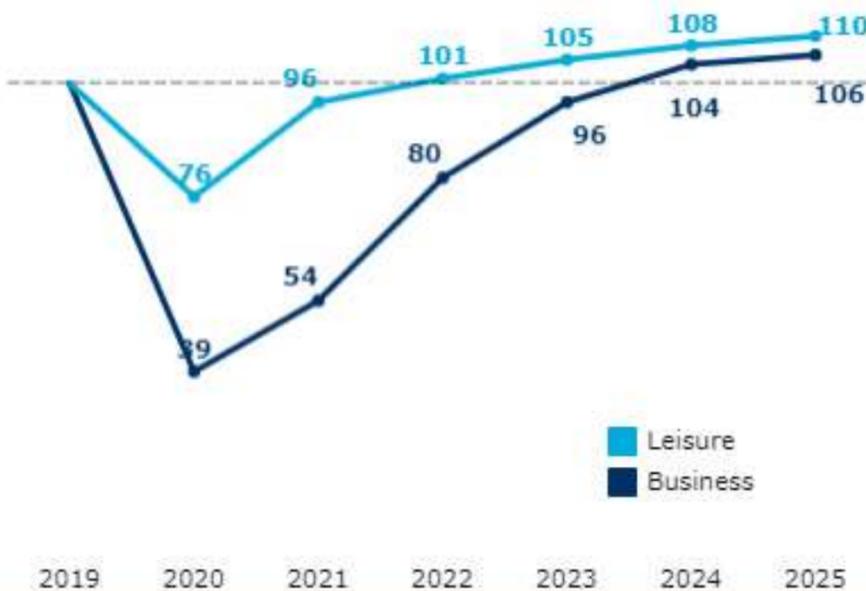
Domestic Business Travel Volume by Segment
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	Transient	Group
2020	38	25
2021	59	38
2022	81	70
2023	89	100
2024	105	97
2025	108	102

■ Transient ■ Group

SYMPHONY TOURISM ECONOMICS

Insights

U.S. hotel demand will reach full recovery in 2022 based on the updated forecast released in January by Tourism Economics and STR.

Even as average daily rate (ADR) will recover to 2.7% above its 2019 level, real ADR, adjusted for inflation, will be 7.2% below its 2019 level. Revenue per available room (RevPAR) on a nominal basis is projected to fully recover in 2023, with occupancy recovering slightly ahead of its prior peak.

This updated forecast anticipates a slightly stronger level of RevPAR in 2022 than in the prior quarterly forecast. Overall, 2022 room revenue is estimated to average 3.1% above 2019 levels.

According to the STR Market Recovery Monitor, in December 81% of markets were classified as peak as compared to 65% in November. Markets are classified as Depression if RevPAR (total room inventory) is less than 50% of 2019 level for the same month, Recession (between 50% and 80%), Recovery (80% and 100%), or Peak (above 100%).
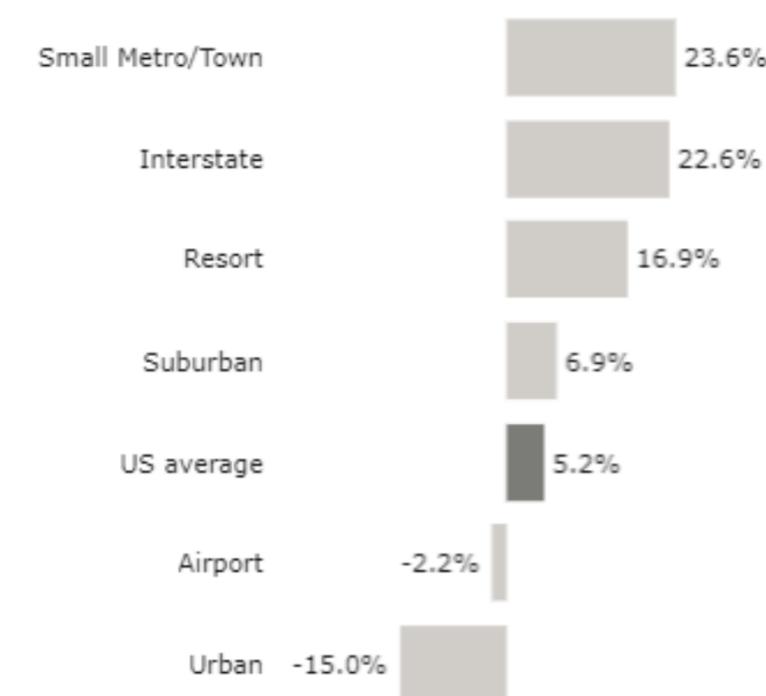
U.S. Hotel Forecast Summary
YOY % change, Forecast released January 2022

	2020	2021	2022	2023
Supply	-3.9%	5.1%	2.8%	1.3%
Occupancy	-33.3%	31.0%	10.7%	3.6%
Demand	-35.9%	37.7%	13.8%	4.9%
ADR	-21.1%	20.7%	7.9%	4.0%
RevPAR	-47.4%	58.1%	19.4%	7.7%
RevPAR relative to 2019	-47.4%	-16.8%	-0.6%	7.0%

Note: RevPAR reflects standard methodology
Source: STR; Tourism Economics
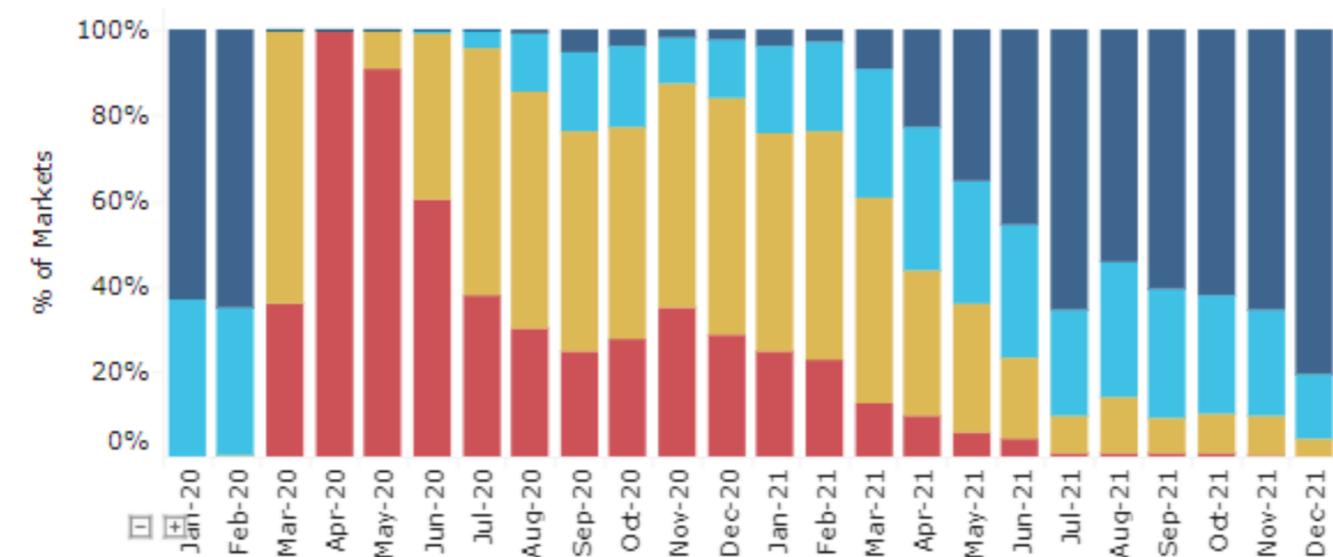
U.S. Actual RevPAR Growth by Location
December 2021, % change relative to 2019

Location	% change
Small Metro/Town	23.6%
Interstate	22.6%
Resort	16.9%
Suburban	6.9%
US average	5.2%
Airport	-2.2%
Urban	-15.0%

Source: STR

STR Market Recovery Monitor
As of January 25, 2022

Legend: Peak, Recession, Recovery, Depression

Source: STR

U.S. Hotel Forecast Indexed to 2019
Forecast released January 2022 (2019 = 100)

Demand Index
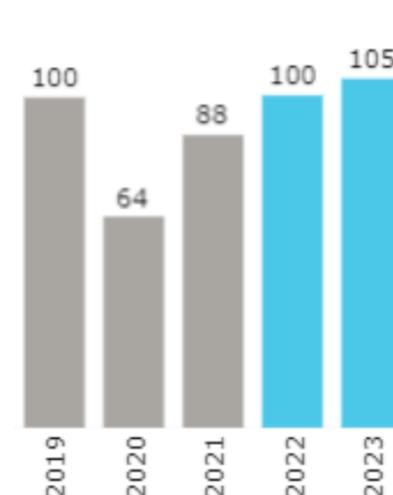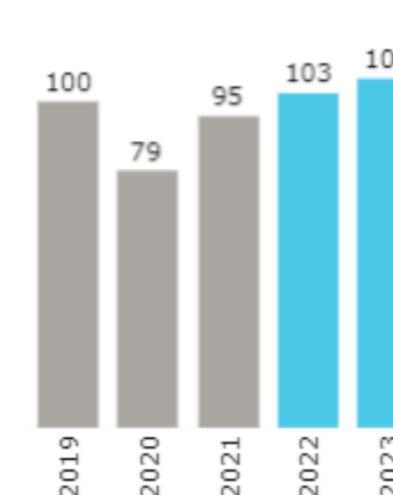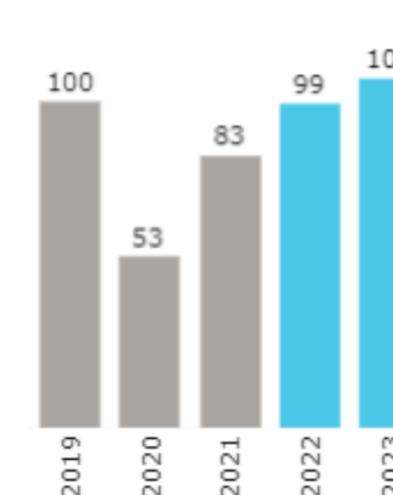
2019	2020	2021	2022	2023
100	64	88	100	105

ADR Index

2019	2020	2021	2022	2023
100	79	95	103	107

RevPAR Index

2019	2020	2021	2022	2023
100	53	83	99	107

Note: RevPAR reflects standard methodology
Source: STR; Tourism Economics

SYMPHONY | TOURISM ECONOMICS

H2R Strengths Finder

Low importance, yet high in description. An important attribute, whether or not travelers realize it.

High importance and high descriptiveness. Important in every way to travelers.

Low importance and low description. Unimportant in every way to travelers.

High importance, but not descriptive. Your visitors believe it to be important but are not having that need met.

Each of Branson's attributes has been analyzed and segmented into four buckets in the chart to the left. Strengths Finder evaluates the relative importance of each element of the brand alongside how well travelers believe these attributes describe Branson.

Respondents' scores for importance are plotted on the X-axis while the scores for descriptiveness are plotted on the Y-axis. The average scores for each create the breaking points for the quadrants.

The resulting analysis illustrates how the elements of brand perception play a role by plotting each characteristic into one of four quadrants.

Hurdle/Barrier Analysis

On the surface, prospects often provide standard excuses for their behavior, which we refer to as Stated Hurdles/Barriers.

Correlation analysis reveals to what extent prospects' Stated Hurdles/Barriers match up with their intent to visit.

Arguably, the higher the correlation a hurdle/barrier has with intent to visit, the more credible the barrier is as a root cause of not experiencing. Those that correlate highest are referred to as Derived Hurdles/Barriers.
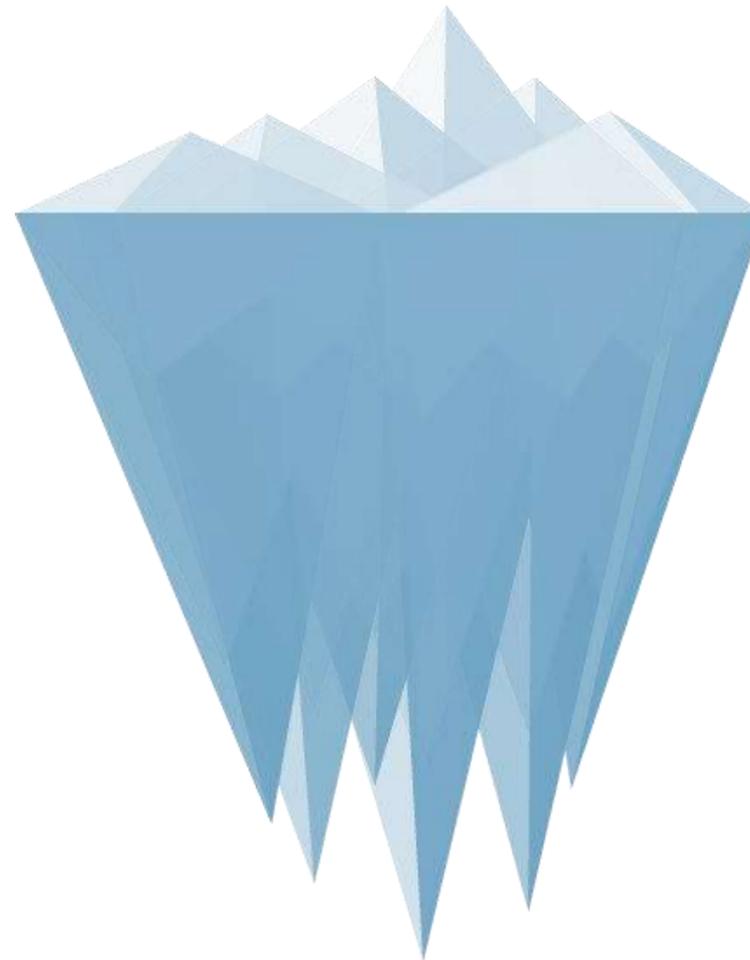
Stated Hurdles/Barriers

(what travelers *said* is keeping them from visiting Branson)

Derived Hurdles/Barriers

(what *actually* correlates with their intent to visit)

THANK YOU

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