

4TH QUARTER/YEAR-END 2016 MARKETING REPORT

Branson Convention & Visitors Bureau

- U.S. Travel Performance
- Travel Industry Update
- Branson 2016 Performance
- Branson Visitor Update

PRESENTATION OVERVIEW

TRAVEL PERFORMANCE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF FEBRUARY 15, 2017



U.S. LEISURE & BUSINESS TRAVEL

- According to USTA, leisure travel person-trips increased by 1.7% in 2016 while business travel person-trips decreased by 0.6%.
- They expect growth to continue in leisure travel in 2017, but at a slower pace. Leisure travel is expected to increase by 1.6% in 2017 while business travel is expected to rebound into positive territory growing by 1.3%.

U.S. ROOM DEMAND +1.7%

According to STR, U.S. room demand increased 1.7% in December to end calendar year 2016 also up by 1.7% over the last 12 months. Additionally, ADR grew another 3.1% on the year to reach \$123.97.

- YTD Occupancy: +0.1%
- YTD Room Demand: +1.7%
- YTD Revenue: +4.6%

SOURCE: STR, DECEMBER 2016 REPORT

INDUSTRY UPDATE

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MISSOURI BREAKS TOURISM
RECORD IN 2016 WITH 41.7
MILLION VISITORS.

Tourism Impact Continues. A recent report showed Missouri set records for tourism in FY 2016. According to a news release from Gov. Jay Nixon's office, Missouri welcomed 41.7 million visitors in 2016, a 3.2% increase from the previous record of 40.4 million in FY 2015, citing figures from the FY16 annual impact report by Tourism Economics, a division of Oxford Economics.

U.S. HOTELIERS KEEPING EYE ON DIP IN BOOKINGS FROM EUROPE.

European Bookings to the U.S. are Down. U.S. hoteliers have reported seeing a decline in bookings from European travelers heading into 2017 and are looking to explain what has caused the drop.

Possible factors include economic uncertainty in the continent, coupled with a new U.S. president. But it's hard to say what combination of things, if any, is keeping Europeans away.

US NATIONAL PARKS HIT RECORD ATTENDANCE NUMBERS IN 2016.

More than 325 million people visited U.S.

National Parks in 2016. The U.S. national parks had a banner year in 2016. For the third year in a row, park attendance shot up to an all-time high, at 325 million visitors compared to a record-breaking 307 million in 2015.

The winners? Without December numbers, which haven't come in yet, the Grand Canyon had 5.9 million visitors, Yellowstone came in at 4.3 million visitors, Rocky Mountain National Park had 4.5 million, and Zion National Park rounded out the top five with 4.3 million visitors.

BRANSON 4Q PERFORMANCE

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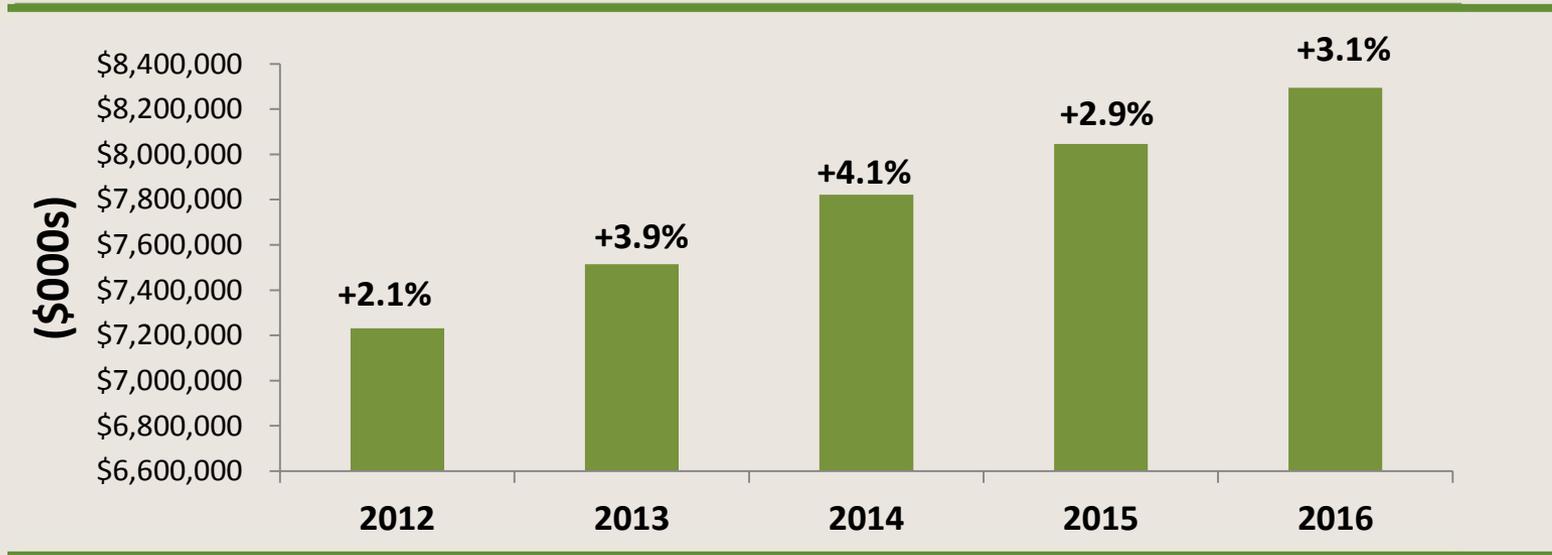
BRANSON ESTIMATED VISITATION

4th Quarter YTD 2016



CITY OF BRANSON SALES TAX

4th Quarter YTD 2016



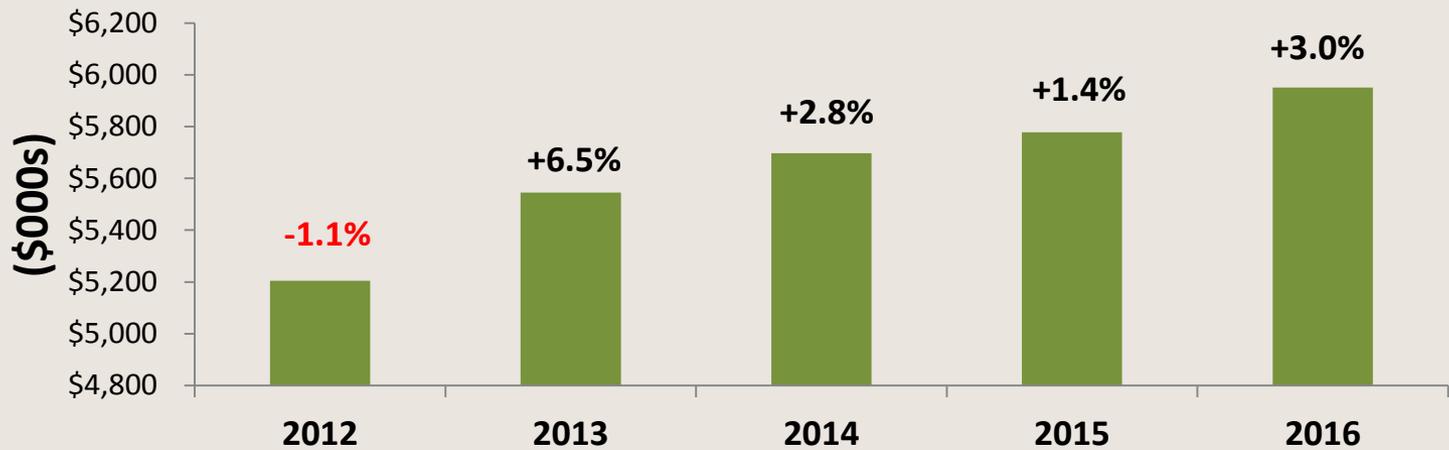
CITY OF BRANSON TOURISM TAX

4th Quarter YTD 2016



TCED TOURISM TAX

4th Quarter YTD 2016



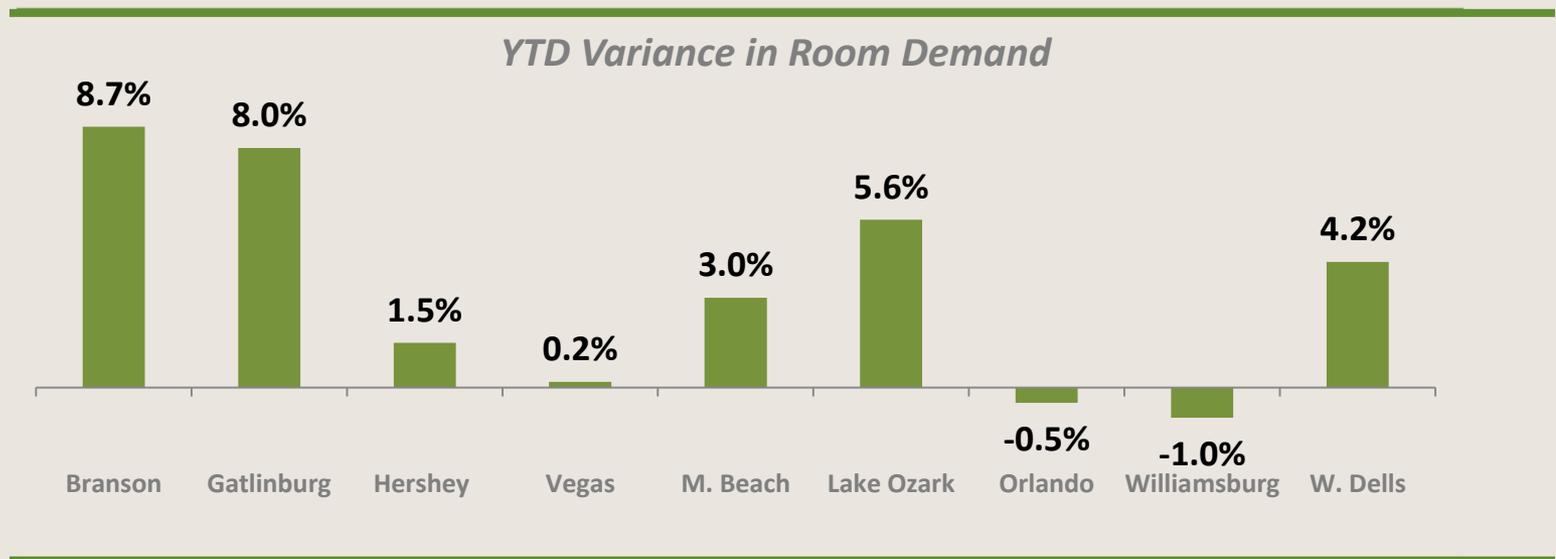
STONE COUNTY TAX

4th Quarter YTD 2016



ROOM DEMAND COMPARISON

4th Quarter YTD 2016



BRANSON VISITOR UPDATE

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EOY VISITOR TRENDS

<u>METRIC</u>	<u>2016</u>	<u>2015</u>	<u>VAR</u>
SPENDING/PARTY	\$911	\$864	+\$47
FIRST-TIMERS	20%	21%	-1%
% FAMILIES	41%	36%	+5%
AVG ADULT AGE	56.2 yrs	59.4 yrs	-3.2 yrs
LOS	4.1 nts	4.1 nts	-0.0 nts
% SEEING SHOWS	73%	72%	+1%
AVG # SHOWS SEEN	3.4	3.5	-0.1

n = 1,906; MOE = +/- 2.2% 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	29%	+ 3%
OUTER MARKETS	30%	+ 9%
<u>NATIONAL MARKETS</u>	<u>26%</u>	<u>- 0%</u>
TOTAL	100%	+4.1%

SOURCE: H2R MARKET RESEARCH, DECEMBER 2016 EOY

MOST INFLUENTIAL SOURCES

26%

Info looked up
on my computer
at home

20%

Discussion with a
friend

17%

Searched online for a
specific Branson
business

DEPARTMENT UPDATES

LEISURE GROUP SALES

- OMCA Travel Trade Show, Niagara Falls, Ontario Canada Oct. 30 – Nov. 2
- Hosted Branson booth at Veteran's Village during Veteran's Week Nov. 5 -11
- Travel South International, Atlanta, GA Nov. 27 – 30
- Distributed 5,000 new Student Guides
- RFI's at the end of 2016 increased 50% - distributed record number of sales kits
- RFP's at the end of 2016 increased 12% - represents 6,989 rooms nights sold

COMMUNICATIONS/PUBLIC RELATIONS

- Most Wonderful Time of Year Parade aired on 26 Nexstar broadcast affiliates in Champaign IL; Huntsville, AL; Springfield, MO; Evansville, IN; Henderson, KY; Sioux City, IA; Amarillo, TX; Memphis, TN; Peoria, IL; Alexandria, LA; Wichita Falls, TX; Myrtle Beach, SC; Rock Island, IL; Fort Smith, Fayetteville, Springdale, Rogers, AR; Waco, TX; Dothan, AL and Des Moines, IA plus Suddenlink in SW MO.
- CVB Announced as North American Travel Journalists Assn. (NATJA) Grand Prize winner for Destination Marketing for its creative and informative marketing.
- At the end of 4Q, Cision/Meltwater/TVEyes had ad equivalency values at \$19.3M, up 9% over previous year.

SPORTS MARKETING AND DEVELOPMENT

- Increased RFPs 10% and booked room nights over 25%.
- Costa FLW Series Championship included anglers from the U.S. FLW Series divisions, plus Canada, China, Mexico and South Korea. Visitors were in town for an average of 6.6 nights resulting in over \$425K in direct visitor spending.
- Branson Disc Golf Development was awarded a PDGA B-Tier tournament for 2017, putting them one step closer to hosting the PDGA's Junior Pro-Am World Disc Golf Tournament in 2020.
- Missouri National Archery in Schools Program (MoNASP) Tournament booked at the Branson Convention Center with estimated participant numbers over 2,000, plus 2.3 travelers (family & friends) per archer.

MEETINGS & CONVENTIONS

- 4Q Results – Distributed 53 RFPs
- 2016 Results – Distributed 185 RFPs & booked 18,672 room nights
- Launched M&C video to 3,000 at Connect Marketplace. This video has been shared 403 times and was viewed over 19,000 times in Facebook alone.
- Published 2016 Meeting, Convention & Sports Guide - won 2016 NATJA bronze award

DIGITAL MARKETING

- ExploreBranson.com 2016 Results
 - 2,288,824 site visits
 - Up 22.09% over 2015
 - 5,980,037 pageviews
 - 58.51% of site traffic from a mobile device
- Explore Branson Social 2016 Results
 - Total audience of 196,177
 - Grew by 19,528
 - 147,977 engagements
 - Up 18.37% over 2015

Most-Viewed Pages	Pageviews
Live Shows	556,660
Homepage	408,721
Attractions	374,332
Things To Do	117,382
Deals	141,602
Calendar	131,734
Vacation Guide	121,088
Dining	120,924
Lodging	113,887

Questions?

THANK
YOU