

2015 YEAR-END MARKETING REPORT

Branson Convention & Visitors Bureau

- U.S. Economic Outlook
- Travel Industry Update
- Branson 4Q 2015 Performance
- Branson Visitor Update
- Department Updates

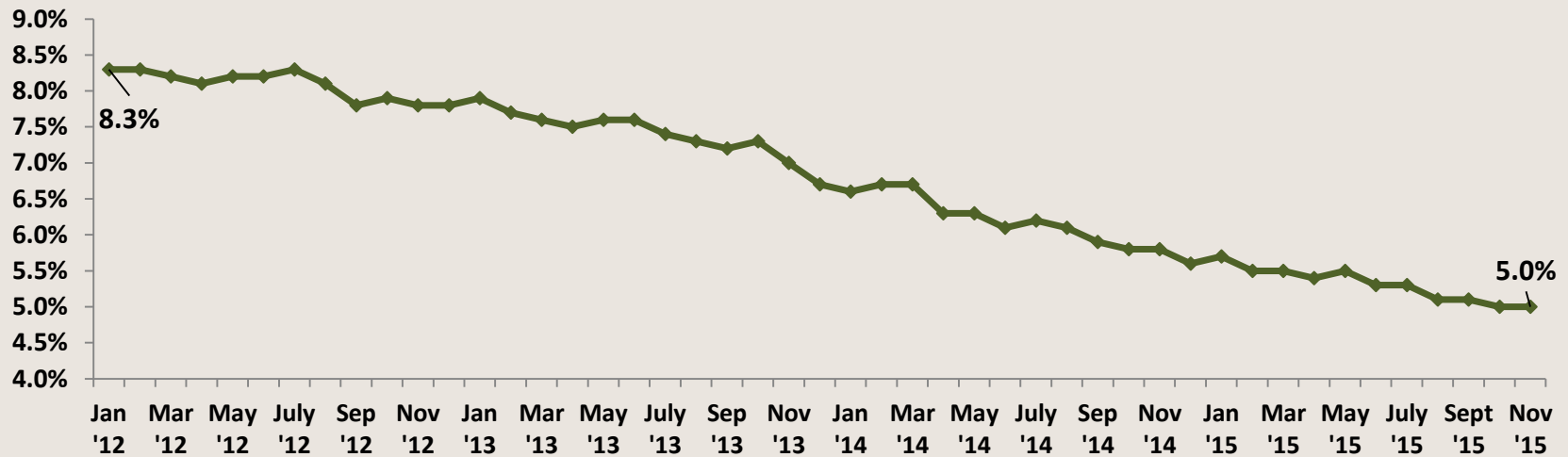
PRESENTATION OVERVIEW

ECONOMIC OUTLOOK

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF JANUARY 31, 2016

U.S. UNEMPLOYMENT

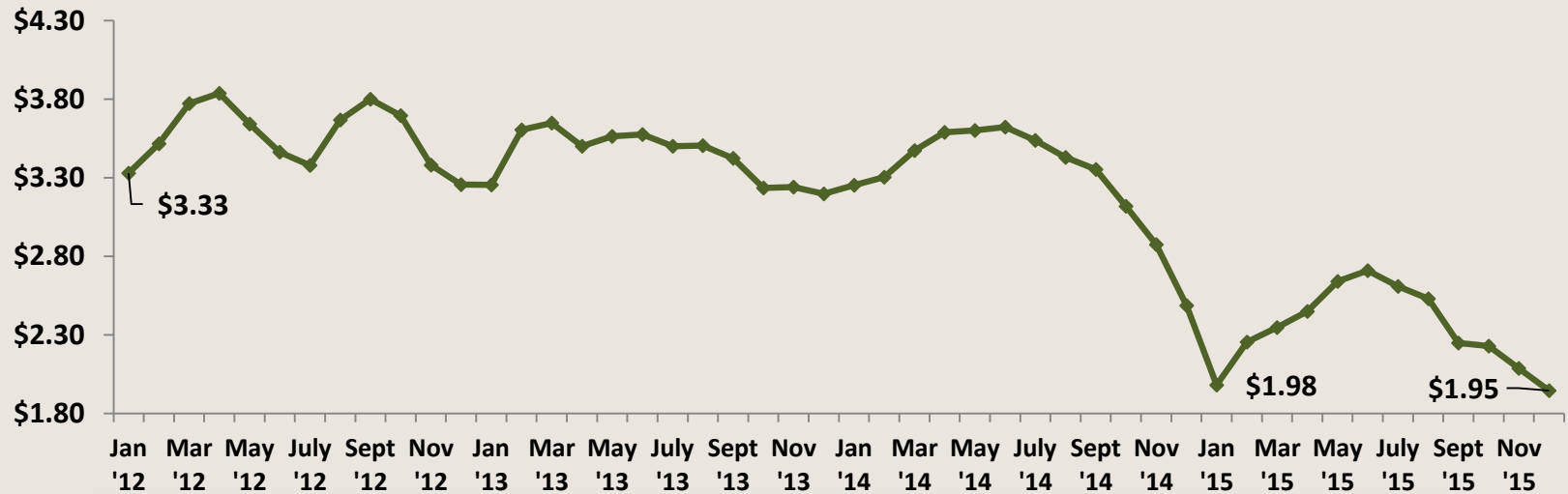
The U.S. Unemployment Rate has decreased steadily since its peak in October 2009 when unemployment reached 10.2%. The 5.0% reported in November 2015 is the lowest level since April 2008 when it was 5.0%.



This year alone, unemployment has dropped from 5.7% in January to 5.1% in August.

GASOLINE PRICES

U.S. Gasoline Prices averaged \$1.95 at the end of December 2015. This is down 22% compared to the same time last year. Gasoline prices fell by an average of \$0.97 throughout 2015.



Gasoline prices have not been this low since July 2004 when they averaged \$1.90.

INDUSTRY UPDATE

ALL INFORMATION *REPORTED* IS FOR CALENDAR YEAR 2015

GROWTH IN TRAVEL
PRICES IS EXPECTED TO
OUTPACE THE GROWTH
IN DEMAND IN 2016.

- USTA estimates that leisure travel grew by 2.5% in 2015.
- Leisure is expected to continue growing in 2016; however, at a slightly lower pace of 2.1%.
- Travel prices are expected to enjoy a nice rebound in 2016.
- Therefore, while the pace of travel growth is expected to slow slightly, total travel expenditures in the U.S. are expected to grow by 3.4% in 2016, strong than the 2.1% growth generated in 2015. (U.S. Travel Association)

BRANSON EOY PERFORMANCE

ALL INFORMATION *REPORTED* IS FOR CALENDAR YEAR 2015

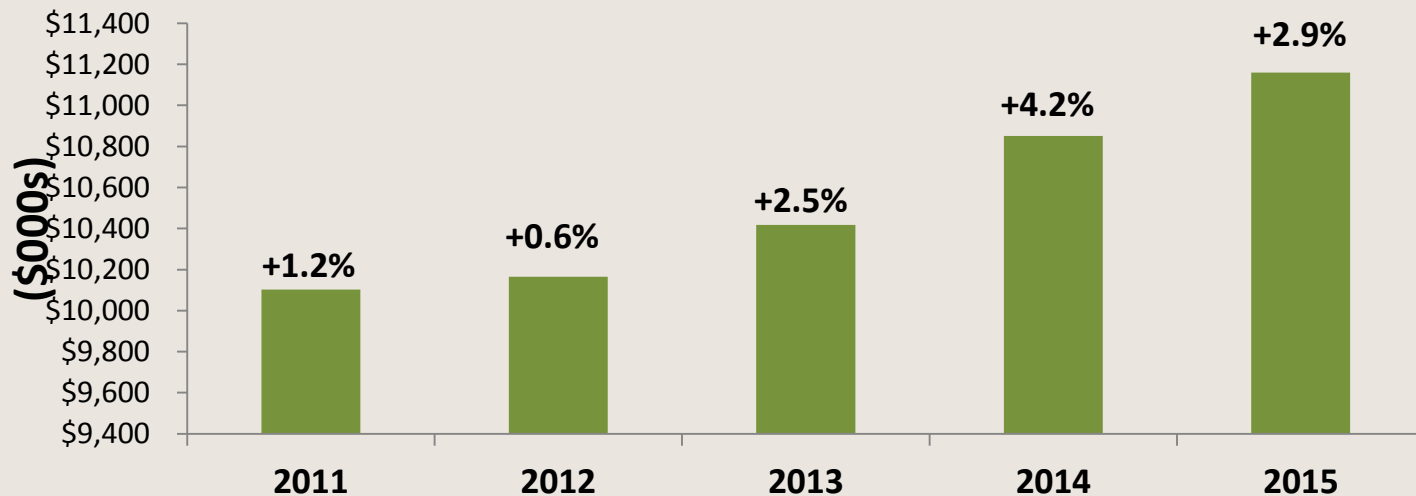
BRANSON ESTIMATED VISITATION

4th Quarter EOY 2015



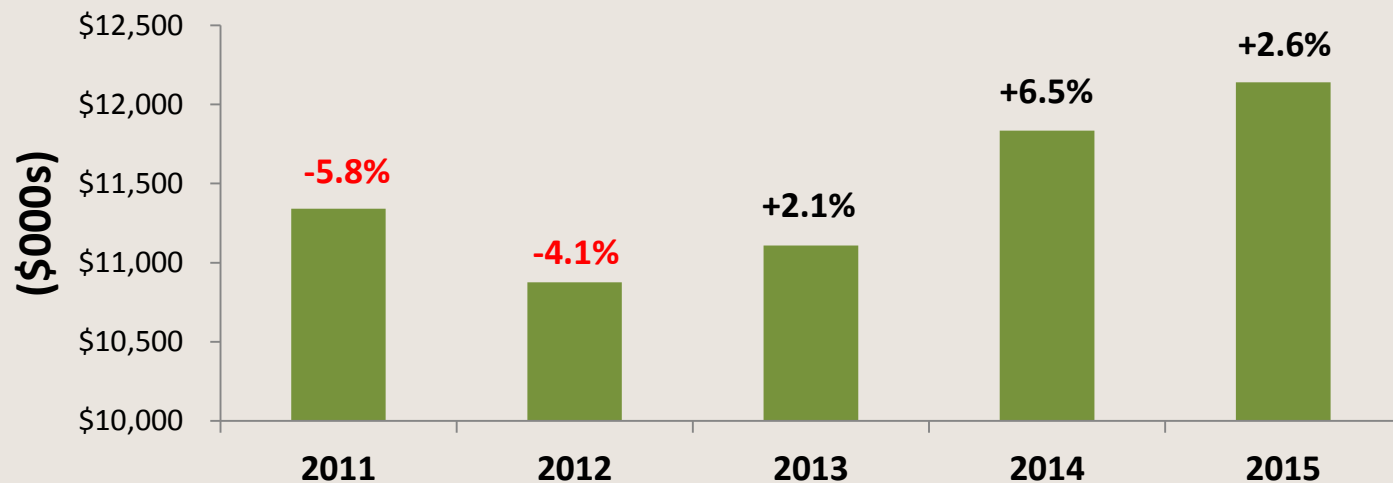
CITY OF BRANSON SALES TAX

4th Quarter EOY 2015



CITY OF BRANSON TOURISM TAX

4th Quarter EOY 2015



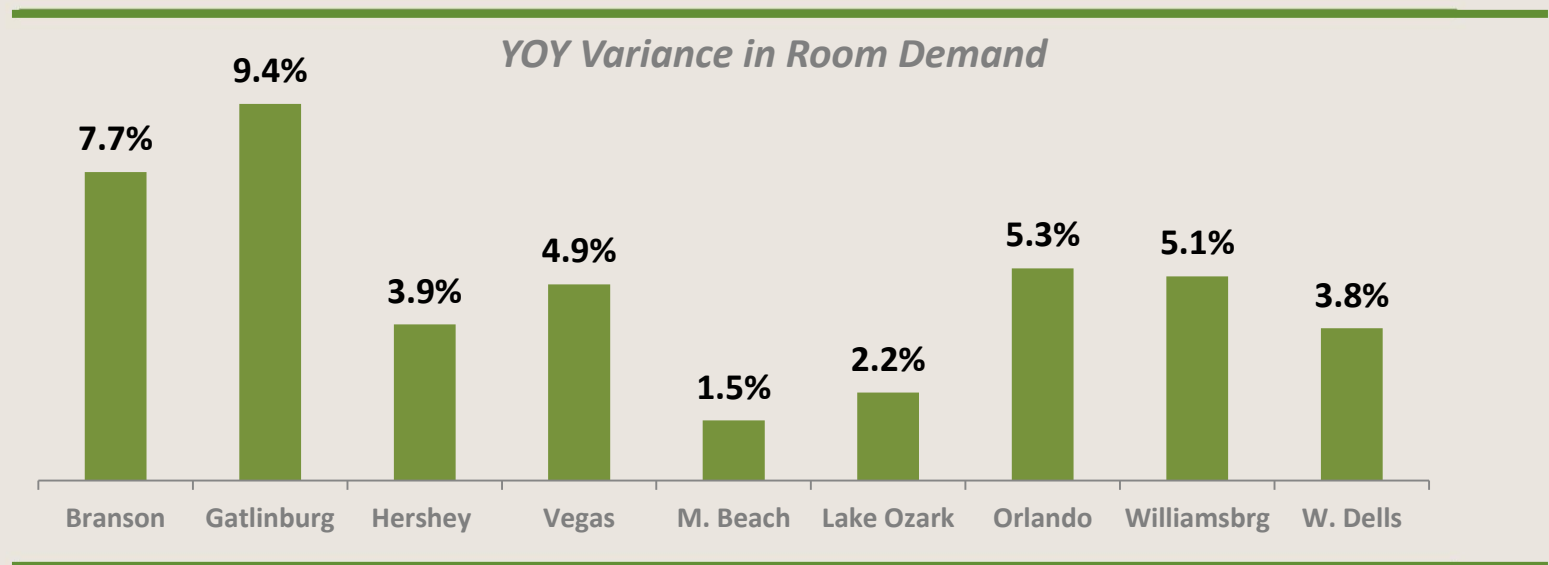
TCED TOURISM TAX

4th Quarter EOY 2015



ROOM DEMAND COMPARISON

4th Quarter EOY 2015



BRANSON VISITOR UPDATE

ALL INFORMATION *REPORTED* IS FOR CALENDAR YEAR 2015

YOY VISITOR TRENDS

METRIC	2015	2014	VAR
SPENDING/PARTY	\$887	\$916	-\$29
FIRST-TIMERS	21%	22%	-1%
% FAMILIES	37%	37%	+0%
AVG ADULT AGE	58.6 yrs	59.2 yrs	-0.6 yrs
LOS	4.2 nts	4.3 nts	-0.1 nts
% SEEING SHOWS	72%	77%	-5%
AVG # SHOWS SEEN	3.4	3.5	-0.1

SOURCE: H2R MARKET RESEARCH, 2015 EOY. n = 1,994; MOE = +/- 2.2% at a 95% Confidence Interval.

VISITATION BY MARKET

METRIC	% VISITORS	VAR TO 14
CORE MARKETS	15%	+ 7.0%
PRIMARY MARKETS	29%	+ 9.0%
OUTER MARKETS	29%	+16.6%
NATIONAL MARKETS	27%	- 7.5%
TOTAL	100%	+ 5.5%

SOURCE: H2R MARKET RESEARCH, 2015 EOY



DEPARTMENT UPDATES

SPORTS MARKETING AND DEVELOPMENT

- Branson was chosen by the readers of *Sports Events Magazine* for the Reader's Choice Award: "2015 Places to Watch."
- The NAIA Men's Division II National Championship returned March 11-17. Participants and spectators were in town for an avg of 4 nights.
- April 22-26, Big Cedar Lodge hosted the second annual Bass Pro Shops Legends of Golf, PGA Champions Tour.
- Diva's ½ Marathon and 5K included a total of 1523 participants, generating 1653 room nights

- **USSSA Girls U9/U10 World Series Championship** was held for the sixth year at the Rec Plex, featuring 51 teams representing 10 states.
- The inaugural Youth Baseball Network National Championship (YBNNC) was held August 19–22.
- **Regions Archery's National Championship** was hosted August 14–16 with 189 participants.
- Bassmaster hosted the **BASS Central Open** October 1-3 with 168 boats, 336 anglers and thousands of spectators in the Branson/Lakes area for the week.
- Bass Pro Shop's annual **Outdoor Days** event was hosted on Table Rock Lake. This is the signature and largest event within the Outdoor Days series.

MEETINGS & CONVENTIONS 2015 YEAR END RESULTS

YTD Comparison	Market Segments	2015			2014		
		# RFPs	Definite Room Nights	Definite RFPs	# RFPs	Definite Room Nights	Definite RFPs
	ASSOCIATION	56	4,702	20	56	8,067	22
	CORPORATE	40	1,799	13	20	905	11
	RELIGIOUS	33	2,917	10	46	1,439	9
	SMEF	54	6,470	11	36	3,418	16
	SPORTS	48	12,124	16	41	12,421	12
	TOTALS	231	28,012	70	199	26,250	70

- We distributed 15% more RFPs in 2015 vs. 2014
- We booked 7.4% more room nights than the previous year

LEISURE GROUP SALES

- 2015 (RFP) Request for Proposals up 45% year to date
- 2015 (RFI) Request for Information up 70% year to date
- Debuted first-ever Student Guide
- 2017 Group Tour & Reunion Planner
- 2017 Travel Agent Commission Guide
- Produced 2015 ABA Tour Operators Branson Breakfast Sponsorship
- Hosted 2015 SYTA Annual Conference
- 8th Annual Professional Travel Planner FAM
- 10th Annual Music Director FAM
- 12th Annual Military Reunion Planners Conference

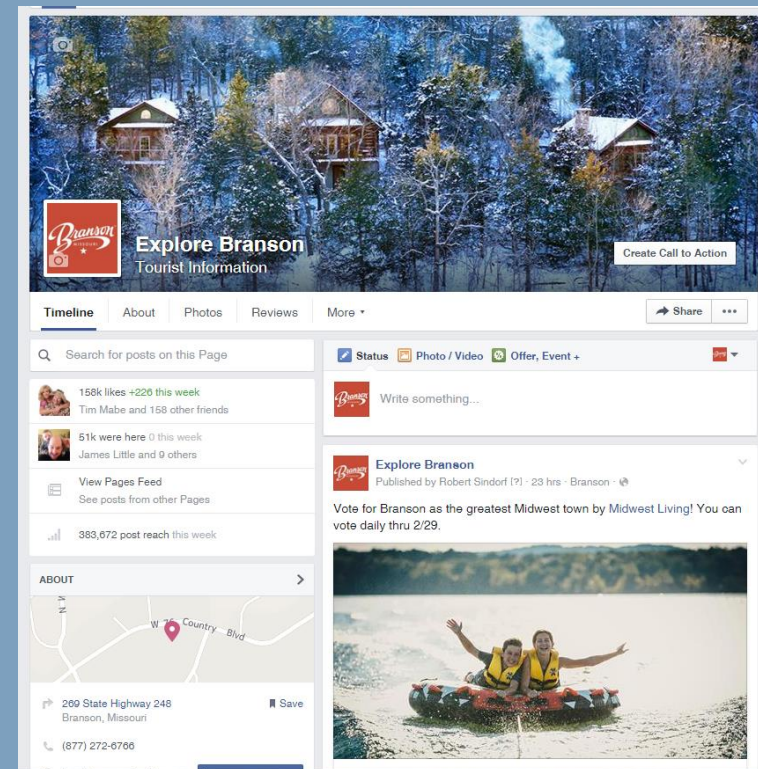
SOCIAL MEDIA AND CONTENT

Explore Branson Social Media

- Total social following of 170,386
- Social followings grew by 13.7%
- 2,465 outbound posts made in 2015, with avg engagement of 58.7 per post

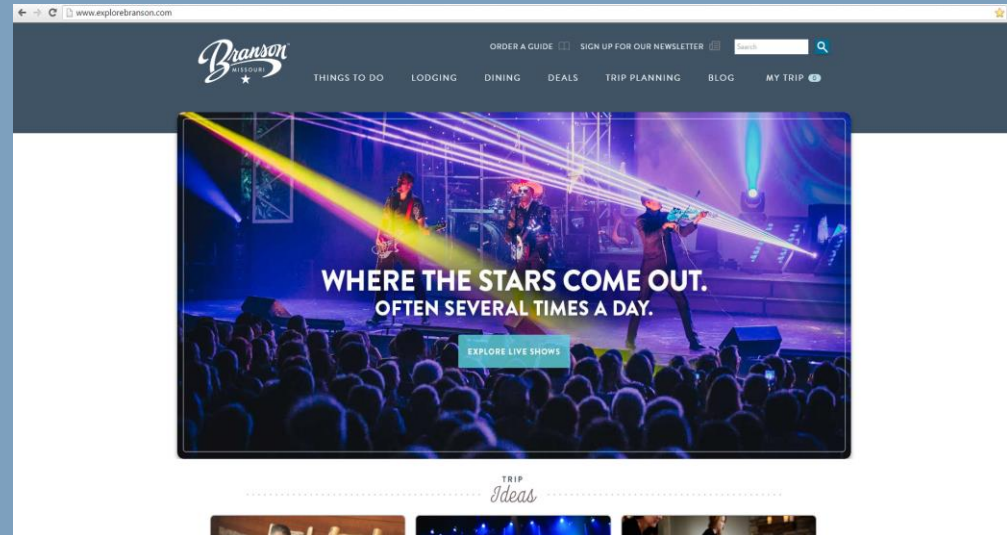
Content Creation

- Over 140 articles written or updated
- 15 videos produced



WEBSITE AND INTERNET MARKETING

- On Nov. 19, the reskin of ExploreBranson.com featuring the new brand identity was made live.
- 2015 web stats:
 - 1,874,707 sites visits
 - 5,770,058 page views
 - Mobile accounted for 43.21% of all site traffic
 - 72.18% of site visits were new visitors



COMMUNICATIONS/PUBLIC RELATIONS

- Vocus/Cision/Meltwater ad equivalency values at \$17.6M, 44:1 ROI
- Hosted Western Chapter Society of American Travel Writers
- The Weather Channel's Sam Champion and Jim Cantore did live 3-hour broadcast from Branson Landing = \$600K ad equivalency
- Trivago named Branson the #1 Best Value City in the U.S. for 2016
- 40th annual Mid-America Emmy Awards will be held in Branson in 2016



Questions?

THANK
YOU