



BRANSON CONVENTION CENTER  
**2011 Attendee Research**



# Key Deliverables & Objectives

---

- To oversample convention center attendees to ensure a large enough sample to compare and contrast with Branson's overall visitor profile;
- To determine how many shows/theaters are patronized by convention center attendees outside the immediate downtown area;
- To compare overall spending by convention center attendees to Branson visitors as a whole;
- To determine what percentage of convention center attendees' expenditures are spent outside of the immediate downtown area; and
- To provide a behavioral and demographic profile of convention center attendees that can be compared and contrasted to Branson's Visitor profile as a whole.

# Contents

---

	Page
<b>Sample Specs &amp; Methodology</b>	<b>4</b>
<b>Executive Summary</b>	<b>6</b>
<b>Convention Attendee Profile</b>	<b>13</b>
<b>Assessment of Convention Attendee Value</b>	<b>45</b>
<b>Branson's 2011 Market Performance (To date)</b>	<b>58</b>
<b>Summary of Key Points</b>	<b>66</b>

# Sample Specifications

- WHO** Branson meeting/  
convention travelers
- WHERE** Branson Convention  
Center and at BCVB  
survey locations  
around town.
- WHEN** April thru November  
2011
- WHAT** Oversampling of  
Branson CVB Visitor  
Surveys so that  
Meetings/Convention  
visitors can be broken  
out separately.



# Methodology

---

- The Convention Center Attendee Research was conducted in Branson from April-November 2011 using a combination of online and telephone interviews.
- Convention Center Attendee questions were added to the official Branson Visitor Profile survey and the Hilton Convention Center was added to Branson's list of intercept sites. Potential respondents were intercepted on location and asked to provide their telephone number or email address so that a follow-up survey could be conducted when they returned home. This approach generated a total of 46 responses over this time period, down from the 75 who were interviewed last year.
- Because of the comparatively small sample, additional shifts of surveyors were once again commissioned to oversample convention center attendees in order to increase the sample size so that a stand-alone convention center attendee profile could be evaluated with confidence. With the responses from the oversampling research, the total number of interviews conducted with convention center attendees reached 225. This size of sample provides for a maximum margin of error of +/- 6.5% at a 95% confidence interval, enough to provide an accurate assessment. This sample is a little smaller than last year's, but likewise incidence in the area was lower and interviewing shifts were confined to the noon hour this year. The overall sample size is more than adequate to provide an accurate convention center attendee profile.

# Executive Summary



## KEY FINDINGS

BRANSON CONVENTION CENTER ATTENDEE RESEARCH



# Meetings/Convention Visitation Drops in 2011

Meetings/Convention Center visitation is estimated to have reached 37,900 over the past 12 months. Similar to Branson as a whole, this number is down from last year. In fact, of all of the group segments tracked, the only segment to post an increase this year were the veteran groups which contributed nearly 55,000 visitors this year.

Overall, group visitation (of any kind) decreased from 8.8% of Branson's total visitation last year to 6.7% in 2011. Meetings/Convention visitation specifically, decreased from 1.1% of the total to 0.8% of all visitors.

## MEETINGS/CONVENTIONS

BRANSON CONVENTION CENTER ATTENDEE RESEARCH



# Most Convention Center Attendees Came from Within 300 Miles in 2011

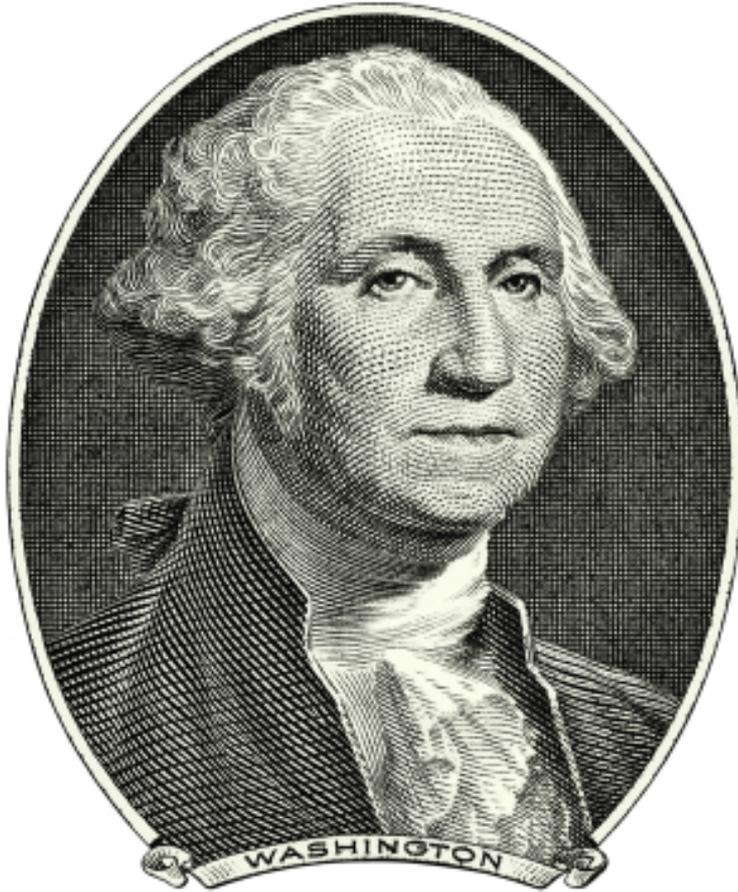
In 2011, the majority (60%) of meetings/convention attendees came from within 300 miles of Branson. This is in sharp contrast to 43% of attendees who came from within a 300-mile region last year.

This more confined geographic distribution had other notable effects as well. Living closer to Branson, it is little surprise that this year's meetings/convention attendee visitor was more likely to be a repeat visitor (56%), was younger (51 years) and had shorter lengths of stay (3.1 nights) than last year's convention center visitor.

## ATTENDEE PROFILE

BRANSON CONVENTION CENTER ATTENDEE RESEARCH

# Meetings/Convention Visitors Spend More



But, while the demographic and behavior profile of meeting/convention visitors may have shifted somewhat this year, this segment of travelers continued to spend considerably more per person than the average Branson visitor.

Meetings/convention travelers spent, on average, \$337 per person in 2011—36% more than Branson's overall average of \$247 per person. Also, while total spending per party among meeting/convention travelers decreased, the \$337 average was 13% higher than the \$299 spent by meeting/convention travelers in Branson last year.

## VALUE ASSESSMENT

BRANSON CONVENTION CENTER ATTENDEE RESEARCH

The background of the slide features a grayscale pattern of binary code (0s and 1s). Overlaid on this are several groups of stylized human icons (silhouettes of people) arranged in various groupings. Each group of icons is enclosed within a thin, orange-colored oval border. The overall composition suggests a focus on group travel or data analysis related to travel segments.

## Meetings/Convention Travelers One of Branson's Biggest Travel Segments

Overall, it is estimated that the meetings/convention traveler segment generated \$13.3 million in sales revenue for Branson this past year.

Relative to other group segments, this projected amount is second only to Reunions which produced \$14.6 million. By comparison, the meetings/convention travel segment produced more revenue than Veteran Groups (\$11.3 million) Professional Group Tour travelers (\$7.6 million), and Church Groups (\$7.0 million).

# PROJECTED SALES VOLUME

BRANSON CONVENTION CENTER ATTENDEE RESEARCH



## 20% of Sales Generated Outside of Downtown Area

Meetings/convention travelers are not only one of Branson's largest group travel segments by sales volume, it is also important to note that much of that revenue is spent outside of the immediate downtown area.

Nearly 40% of those meeting/convention travelers who see a Branson show, see at least one outside of the downtown area -- and nearly one-third of all meeting/convention visitors report shopping outside of downtown.

Overall, the average meeting/convention party spends more than \$192 outside of downtown during their Branson stay.

# SPENDING BEYOND DOWNTOWN

BRANSON CONVENTION CENTER ATTENDEE RESEARCH



## Branson's Down 4.9%

Overall, the Branson market is estimated to be down by 4.9% (YTD through October) compared to last year at the same time.

Through October, Branson's room demand is down by 9.7% and tourism tax revenues are off by 6.8%.

Conversely, the TCED Tax increased by 0.9%, the City 1% Sales tax revenues were up by 1.2% and Taney County sales tax revenues were up by 2.9%.

Altogether, the Branson CVB's weighted performance model uses these inputs to project the area is down 4.9% YTD through October with all of that decrease coming from markets beyond 300 miles.

# MARKET PERFORMANCE

BRANSON CONVENTION CENTER ATTENDEE RESEARCH

**1**

**Convention  
Attendee Profile**

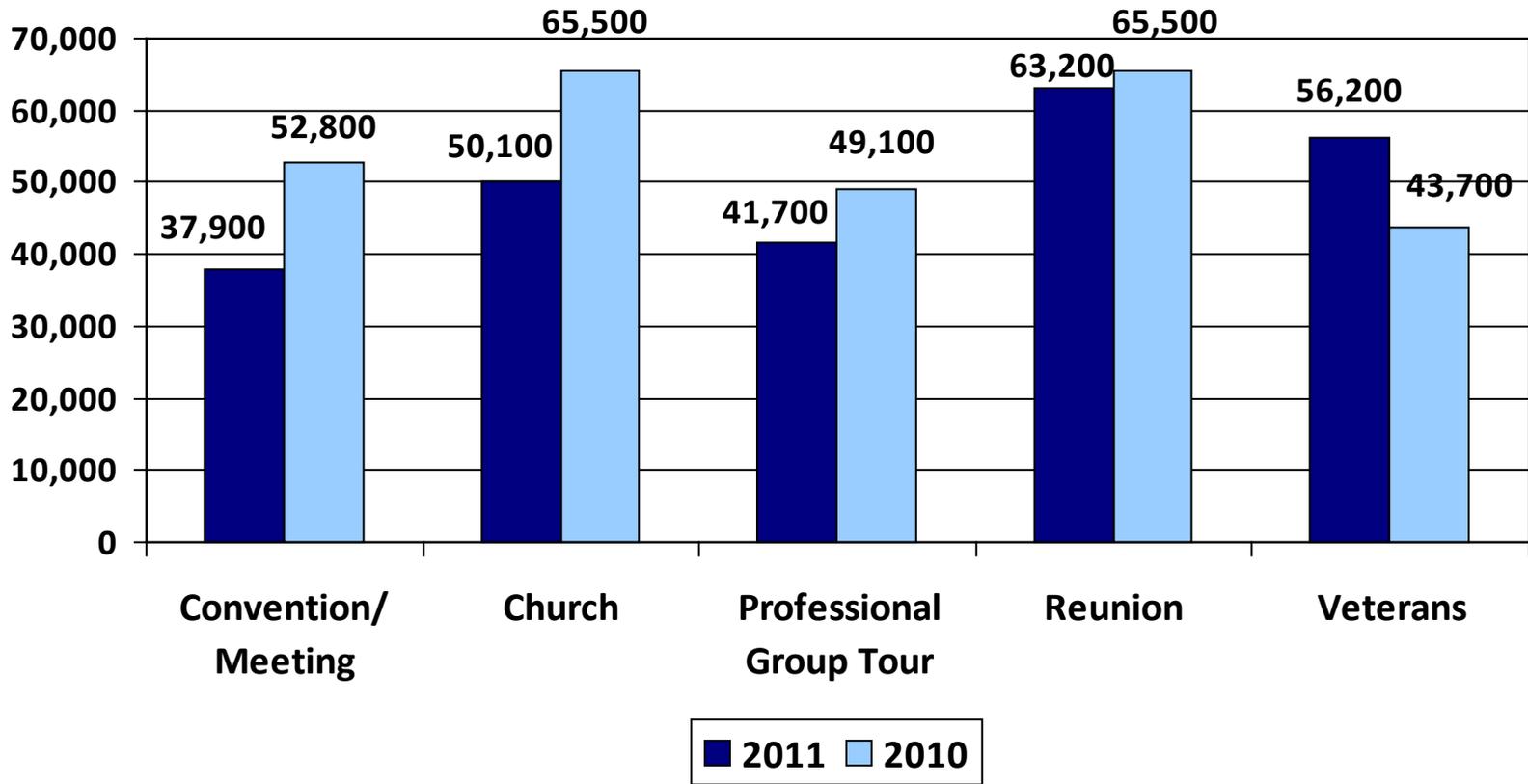
# Projecting Visitor Volume

---

- It is difficult to know exactly how many visit for conventions or meetings because the locations used to intercept these visitors are inherently convention/meeting locations and are driven by data collection quotas more than random selection throughout the area. For this reason, the best assessment of visitation comes from BCVB's fall advertising effectiveness study which shows that 0.8% of Branson's travelers visited the area for a convention or meeting in the past 12 months, down from 1.1% last year. Extrapolated across Branson's overnight leisure visitor base, this equates to an estimated 37,900 annual visitors. This figure, like the group segment overall, is down from the 52,800 that was projected last year.
- Using Branson's monthly intercept study visitor volume from these other key niche segments has been estimated as well (e.g. church groups, reunions, veteran groups, professional group tours). Using the data from the intercept research and applying the same basic algorithm as used with conventions/meetings, it is estimated that most other group segments of the Branson visitor base were also down this year—all except veteran groups.

# Projected Volume of Specific Group Segments

Research indicates that while veterans have increased this year, all other group segments (including the convention/meeting segment) are down this year.



# Convention/Meetings Attendee

---

- Thanks in large part to some economic macro trends that have impacted Branson's overall market performance and visitor profile this year, so too has the convention/meetings attendee profile changed in 2011.
- This year's convention center attendee still looks similar to the average Branson leisure traveler in several ways. Most visit without children, drive their own automobile and are overwhelmingly satisfied with their Branson experience. However, the majority of convention center attendees this year have come from within 300 miles instead of beyond 300 miles, fewer are traveling with children, fewer flew to the area and more are repeat visitors.
- Convention center attendees, however, continue to be younger than the average Branson visitor and are more likely to stay in commercial accommodations.

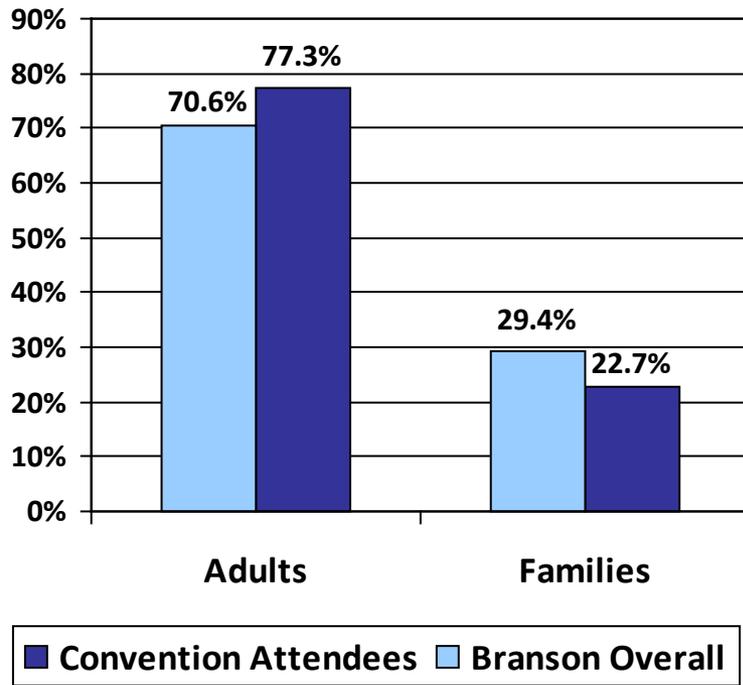
More than **75%** of Branson convention attendees were adults **without children** and **60%** came from **within 300 miles.**



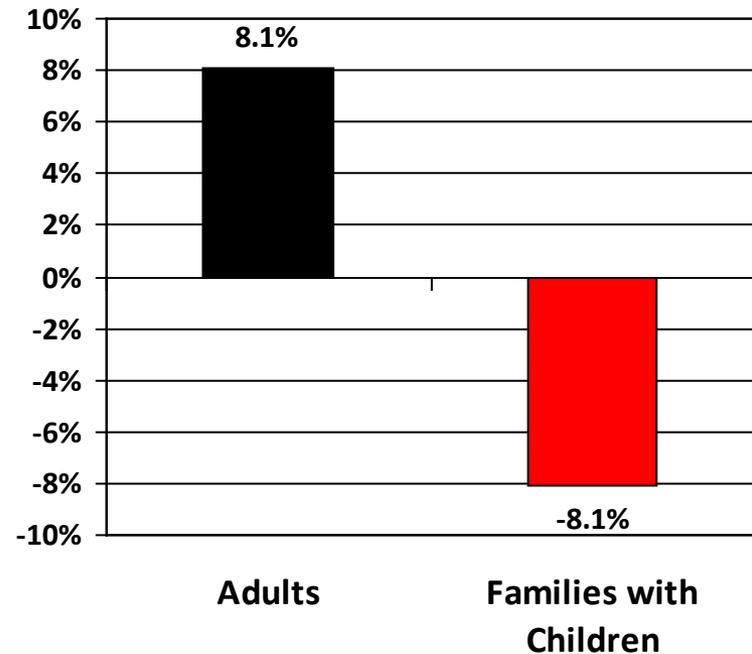
# Visitor Composition

Convention Center visitors once again skewed toward adult couples, and this year attendees were even more likely to visit in parties without children than the average Branson visitor party.

### Comparison to Branson



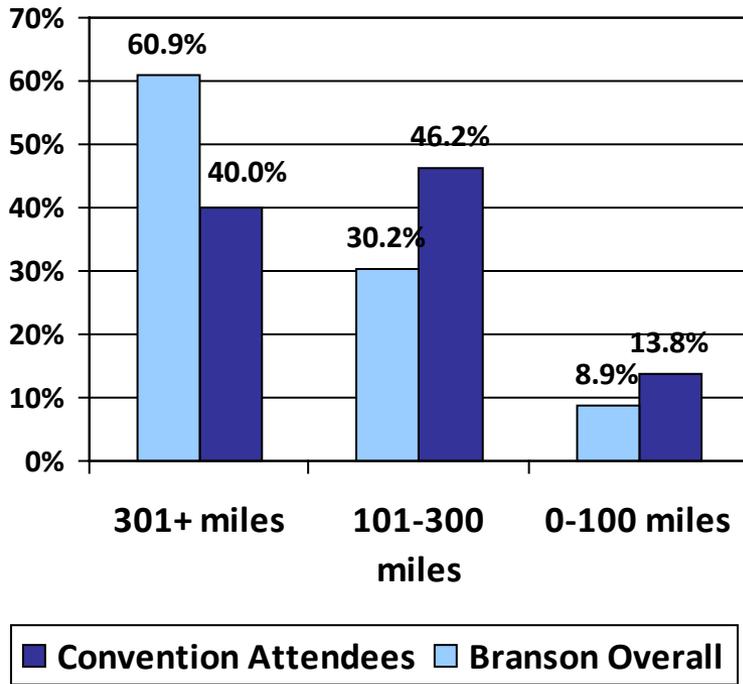
### Compared to Last Year



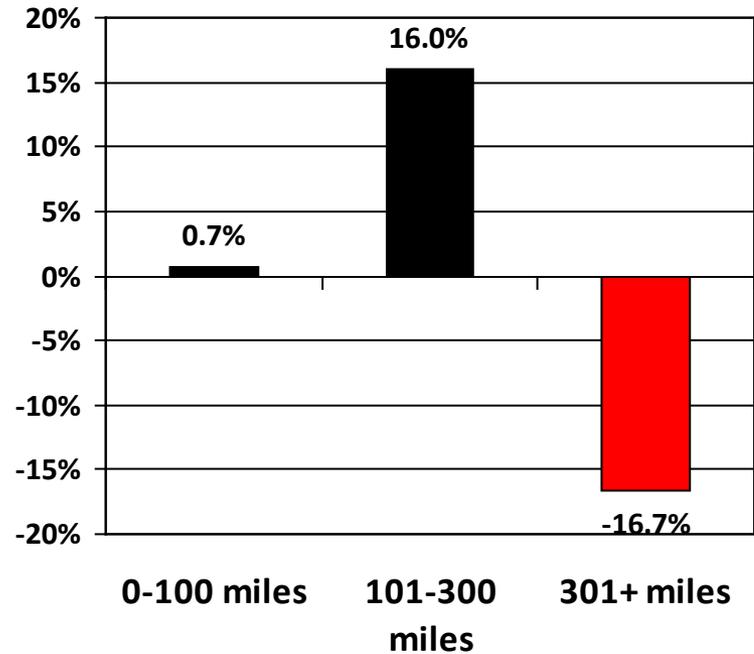
# Distance Traveled

This year convention center attendees were more likely to have come from within the 0-300 mile region while outer market visitation among convention attendees dropped off considerably (similar to Branson as a whole).

Comparison to Branson



Comparison to Last Year



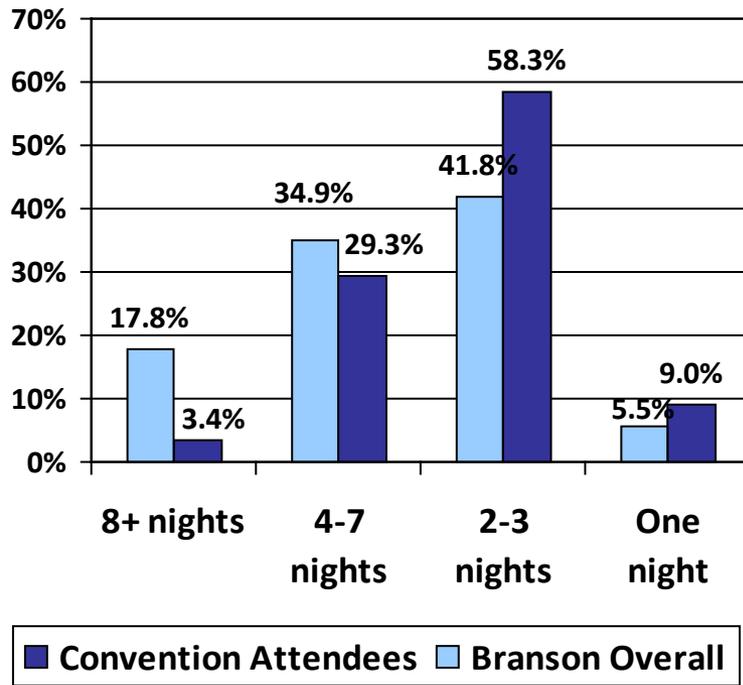
**Length of Stay**  
among convention  
attendees **decreased**  
to **3.1 nights** this  
year.



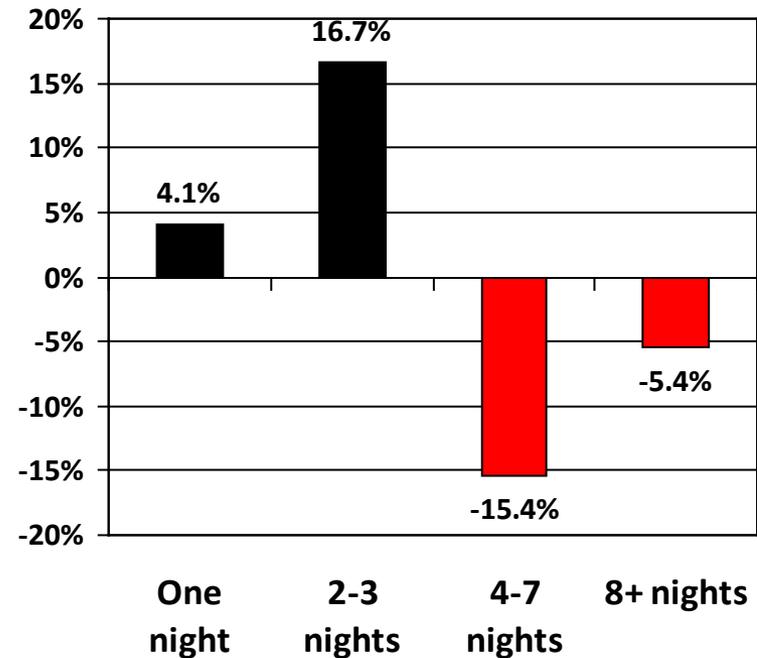
# Length of Stay

Convention Center attendees stayed in the area an average of 3.1 nights compared to Branson's overall average of 4.0 nights. Last year convention center attendees stayed 3.9 nights.

### Comparison to Branson

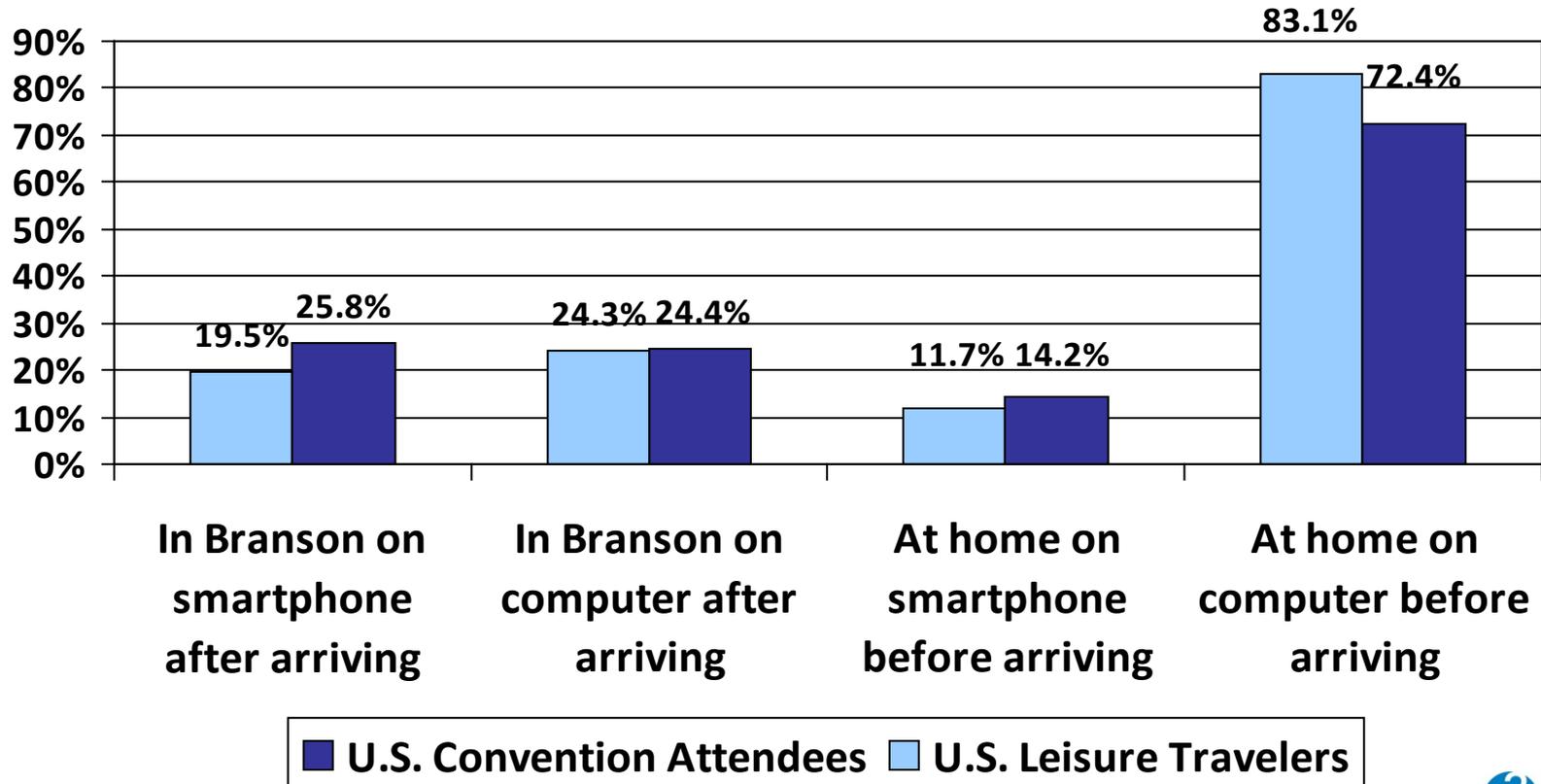


### Variance to Last Year



# Using Digital Resources to Help Plan Branson Trip

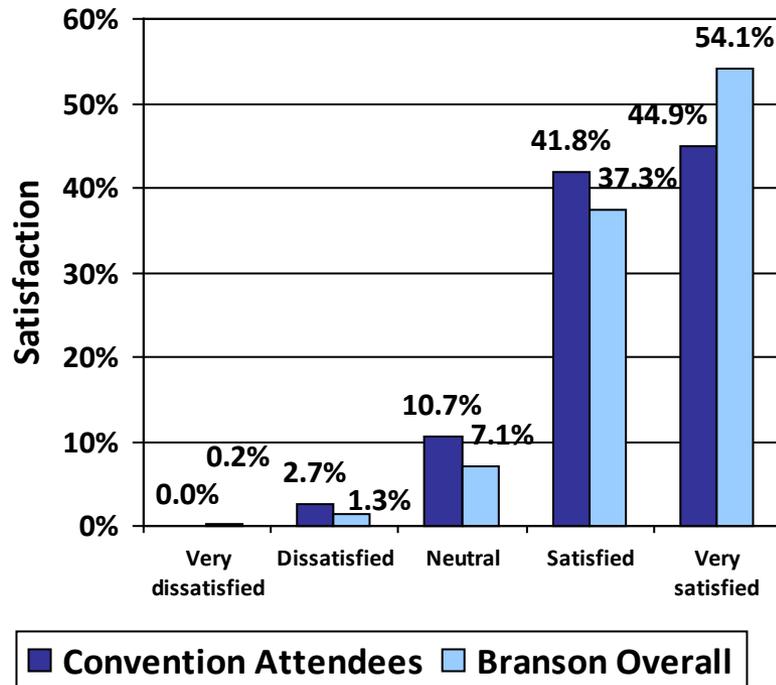
Convention Center attendees were slightly less likely than average to use a computer to look up information about Branson before leaving home, but were more likely than average to look up information on their Smart Phones while in Branson.



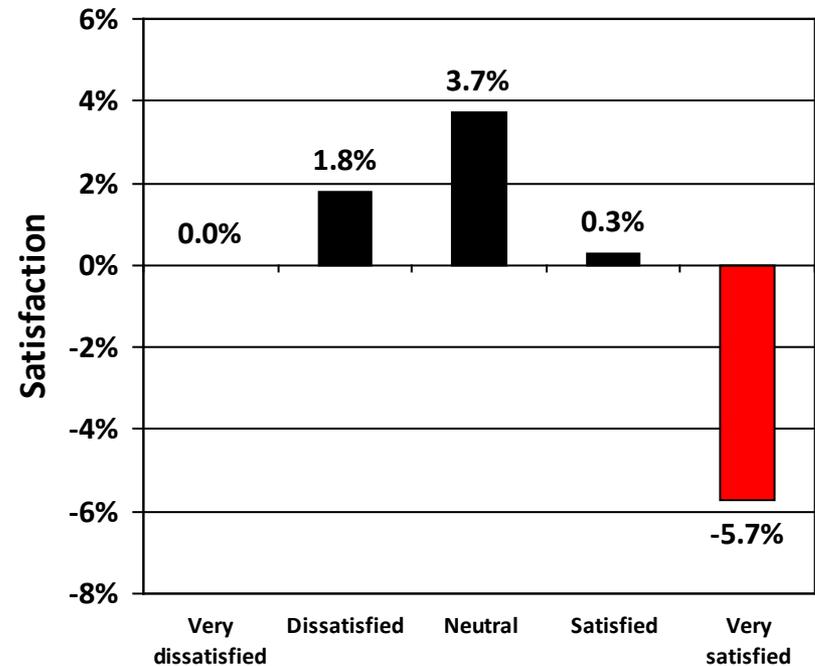
# Overall Satisfaction

Nearly 9 out of 10 convention center visitors say they were satisfied with their visit to the Branson area, down slightly compared to both the average Branson visitor and compared to 2010 attendees.

### Comparison to Branson



### Variance to Last Year



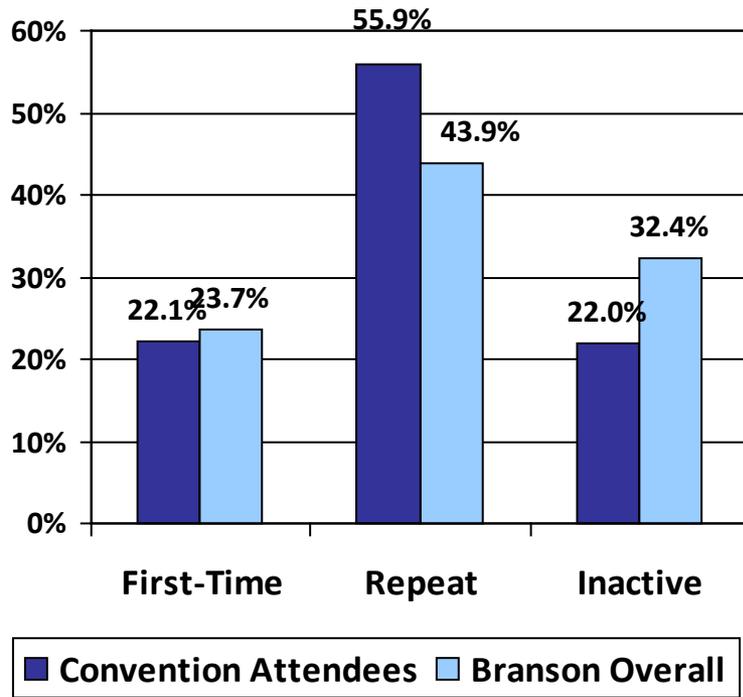
Convention attendees this year were **more likely** to be **repeat visitors** to the Branson area.



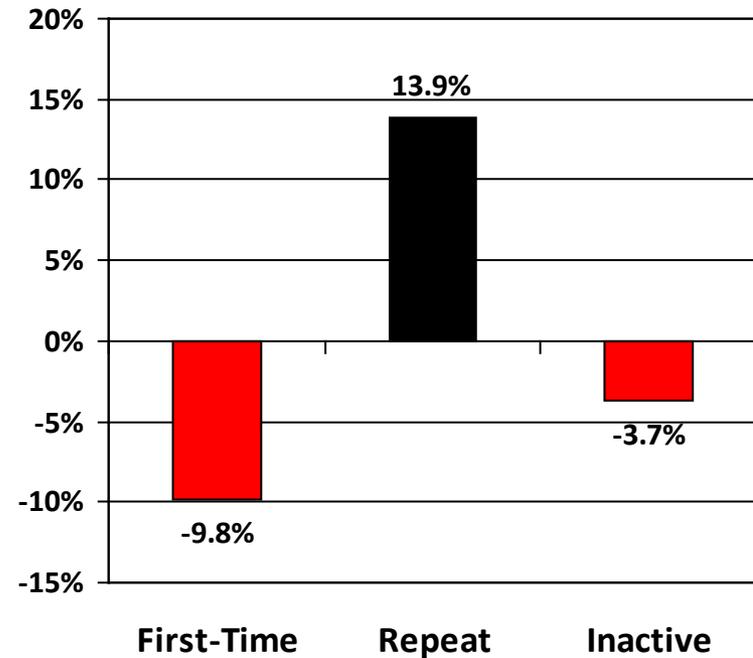
# Last Visit

Most convention center attendees were repeat visitors to Branson this year. Repeat visitation among convention center attendees increased by nearly 14 percentage points this year.

### Comparison to Branson



### Variance to Last Year



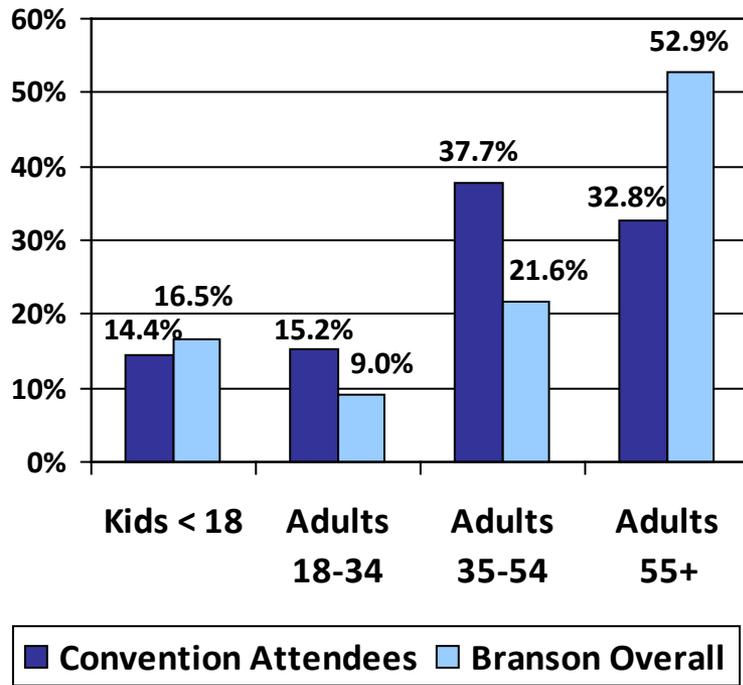
2011 convention attendees are  
**considerably younger**  
than the **average leisure**  
**traveler** who visits Branson.



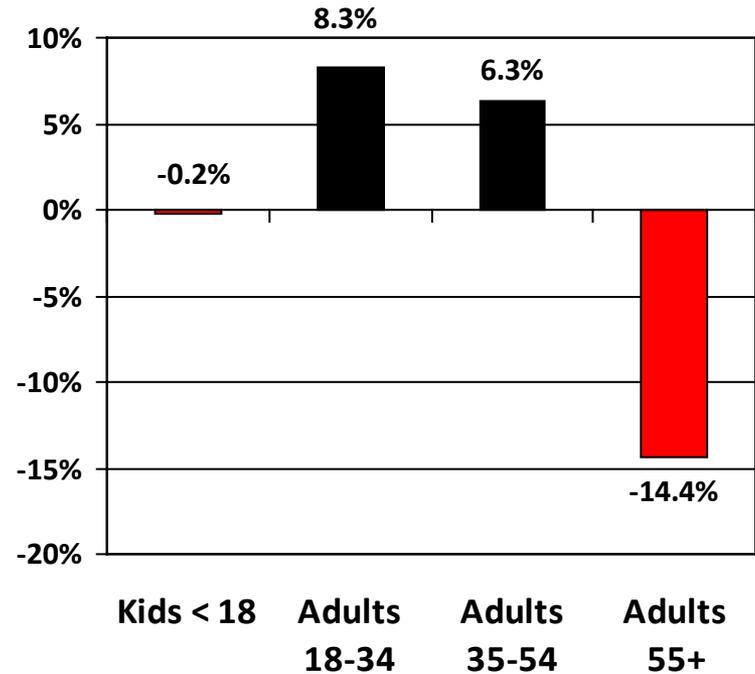
# Age of Visitors

The average convention attendee is 51.2 years of age, considerably younger than the 56.8 average for all Branson travelers and even younger than convention center attendees last year.

### Comparison to Branson



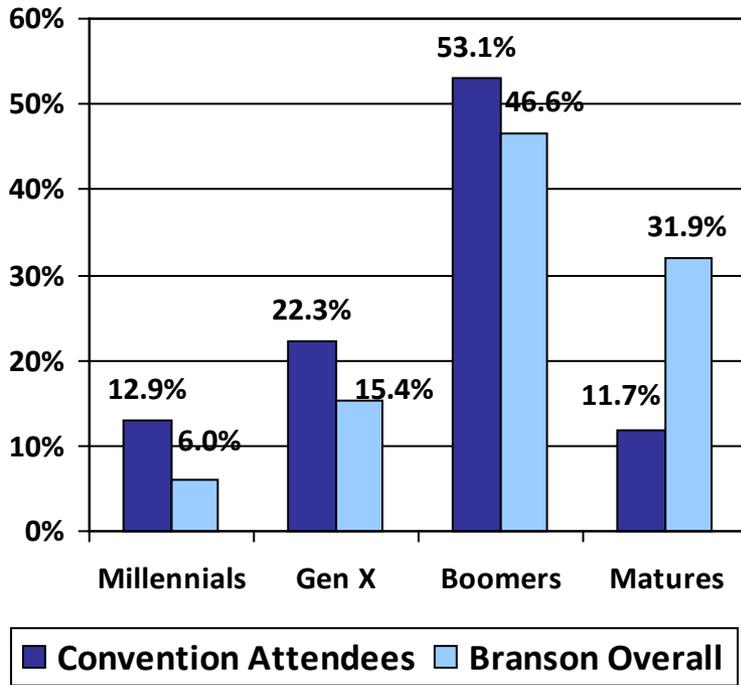
### Variance to Last Year



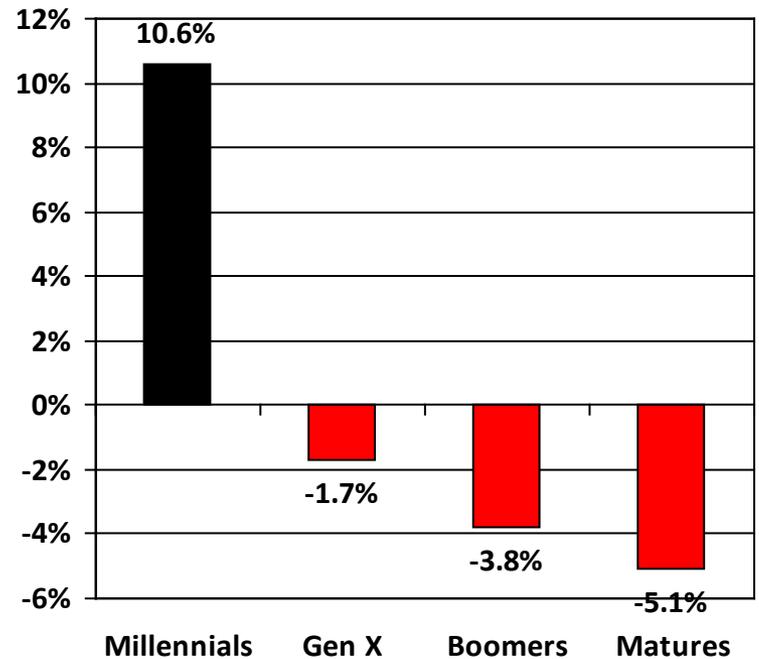
# Age/Generation of Respondents

Convention Center respondents this year are considerably younger than the average Branson survey respondent. The decrease in age was driven by an increase in the number of Millennial respondents.

### Comparison to Branson



### Variance to Last Year



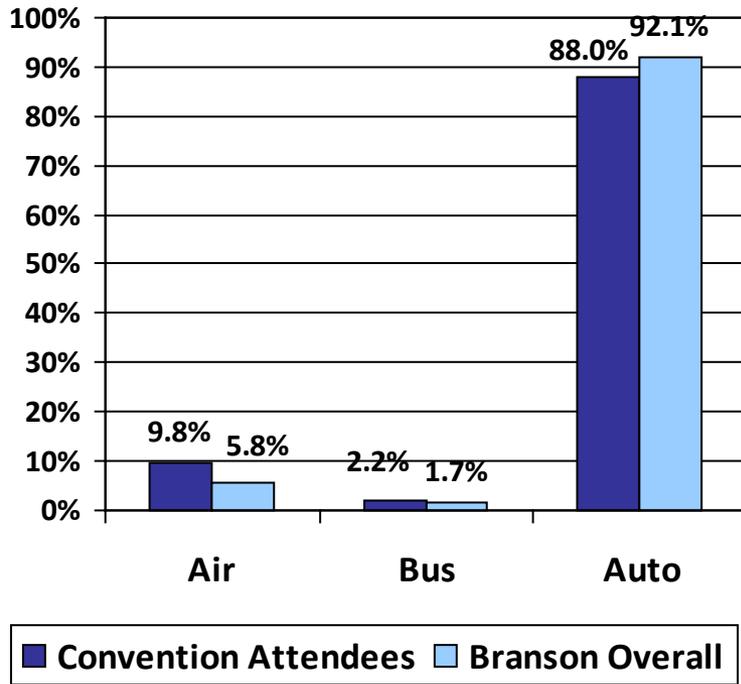
Most convention attendees  
**drive** to Branson. But,  
convention attendees are  
**more likely to fly** than the  
average **Branson leisure**  
**visitor.**



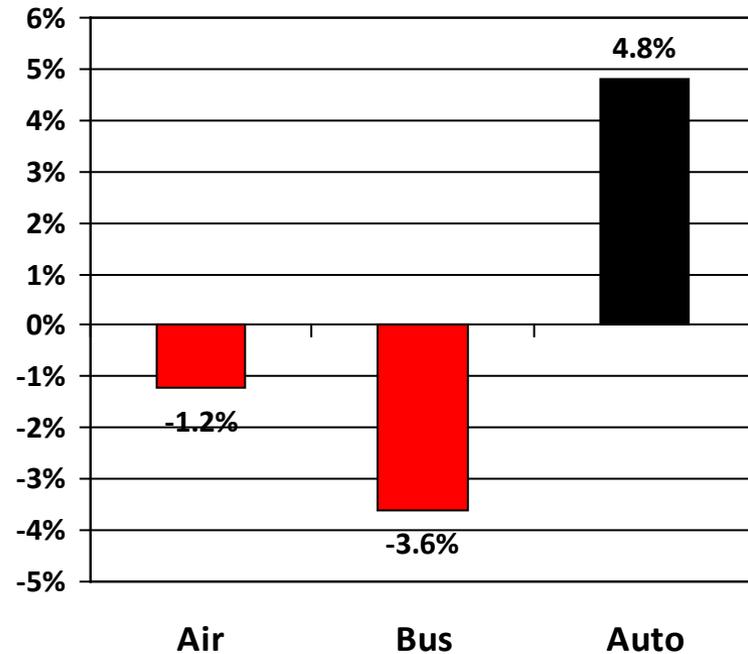
# Method of Transportation

Most Convention Center visitors arrive by automobile, and this segment increased by 4.8 percentage points this year while both air (-0.8%) and bus (-3.5%) travelers decreased. However, convention visitors (9.8%) are much more likely than average (5.8%) to fly to Branson.

### Comparison to Branson



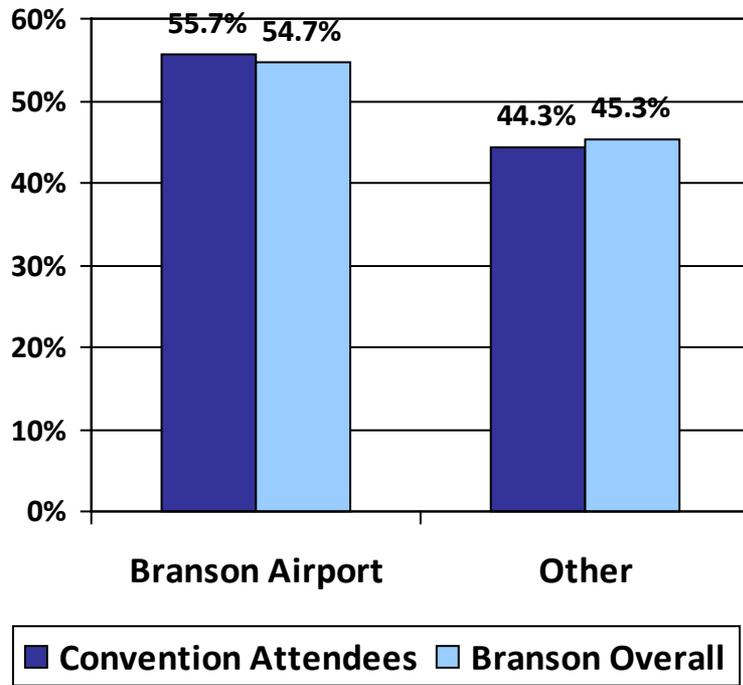
### Variance to Last Year



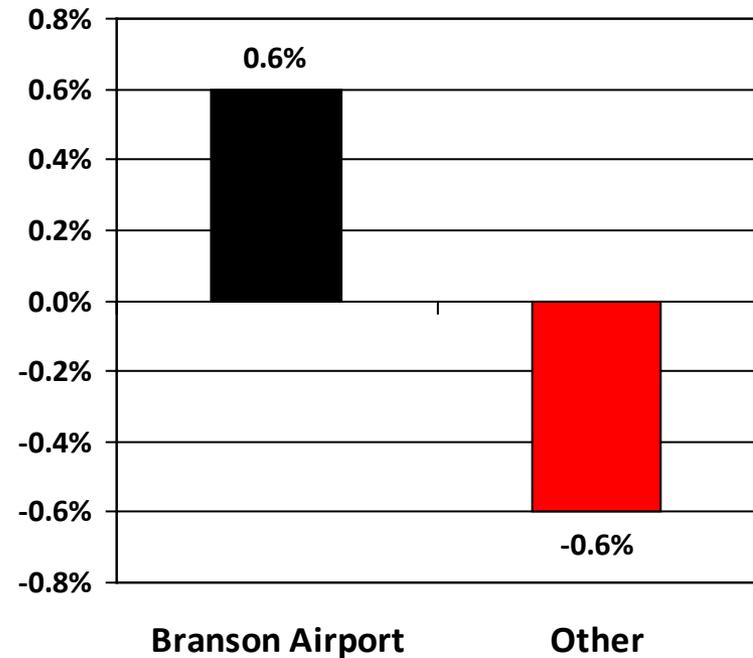
# Airport Used

Despite hosting fewer air travelers more than half of those Convention Center visitors who did fly to Branson this year used the new Branson airport, about the same as last year.

### Comparison to Branson



### Variance to Last Year

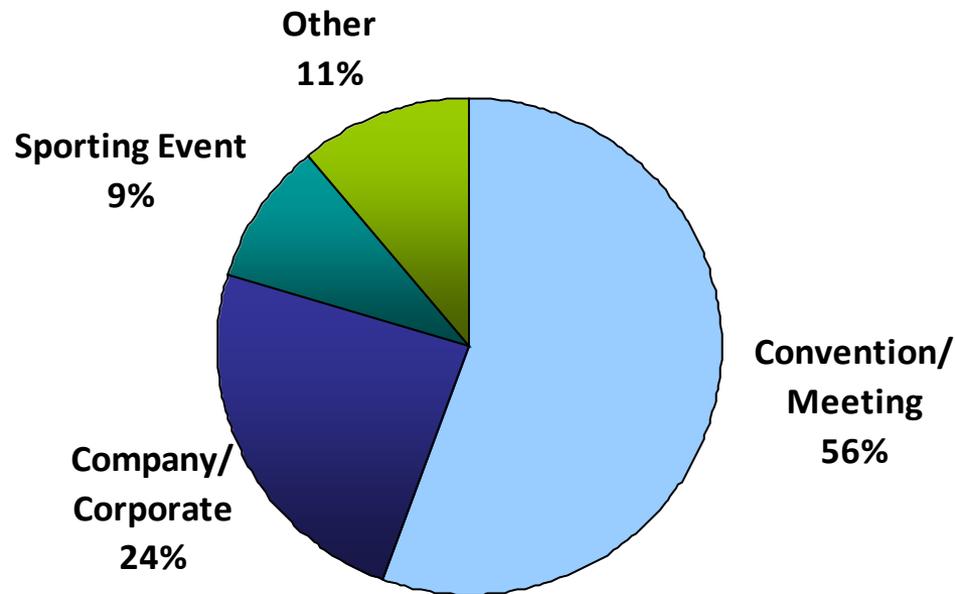


**More than half** of the groups are at the convention center for **meetings** while the **other half** are comprised of **corporate** events, **sporting events, & other.**



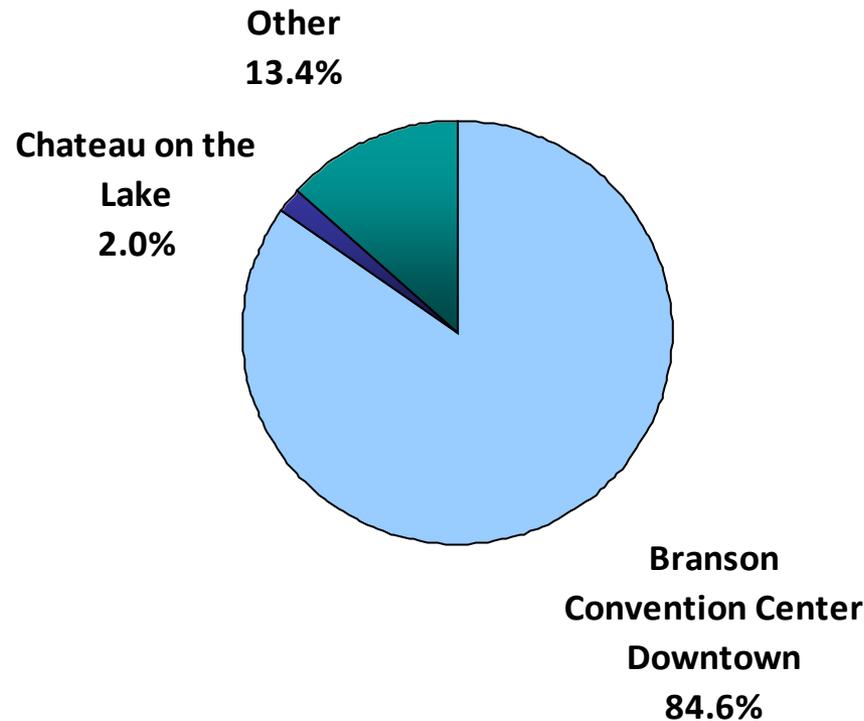
# Type of Group Visiting with at Convention/Meeting

Over half of the attendees interviewed from the Branson Convention Center indicated they were visiting as part of a convention or meeting.



# Where Was Your Meeting/Event Held?

More than four out of five convention center attendees interviewed said their meeting was held at the Branson Convention Center downtown.



# Hotel/Motel Stayed

---

- Hilton Convention Center
- Hilton
- Hilton Promenade
- Branson Hilton
- Branson Hilton Convention Center
- Downtown Hilton
- Branson Towers
- Best Western
- Grand Victorian
- Hall of Fame Motel
- Hampton Inn
- Holiday Inn Express
- Homestead Motel
- Honeysuckle Inn
- Lodge of the Ozarks
- Ozark Mountain Inn
- Radisson
- Willow Tree

80% of respondents said they stayed at least one night at the Hilton, Hilton Convention Center or Hilton Promenade

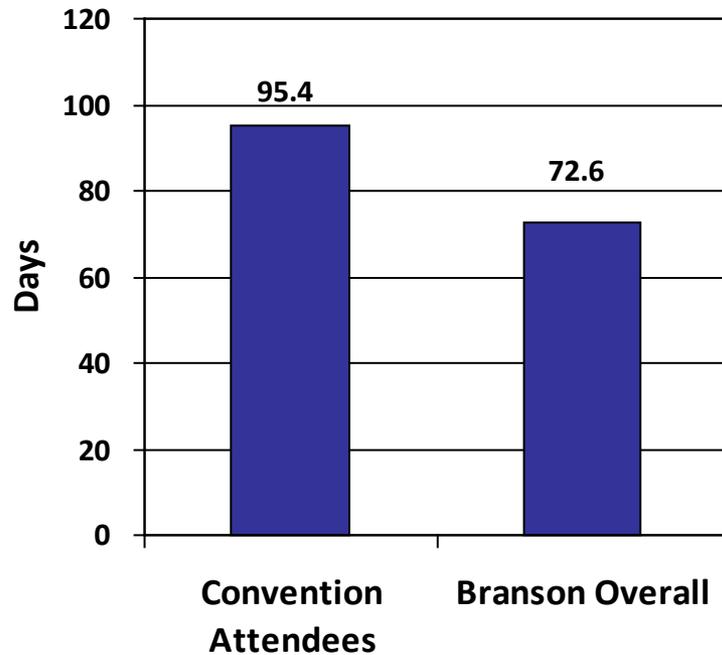
Convention attendees  
take about a **month**  
**longer** to **plan their**  
**Branson trips** than the  
average leisure traveler.



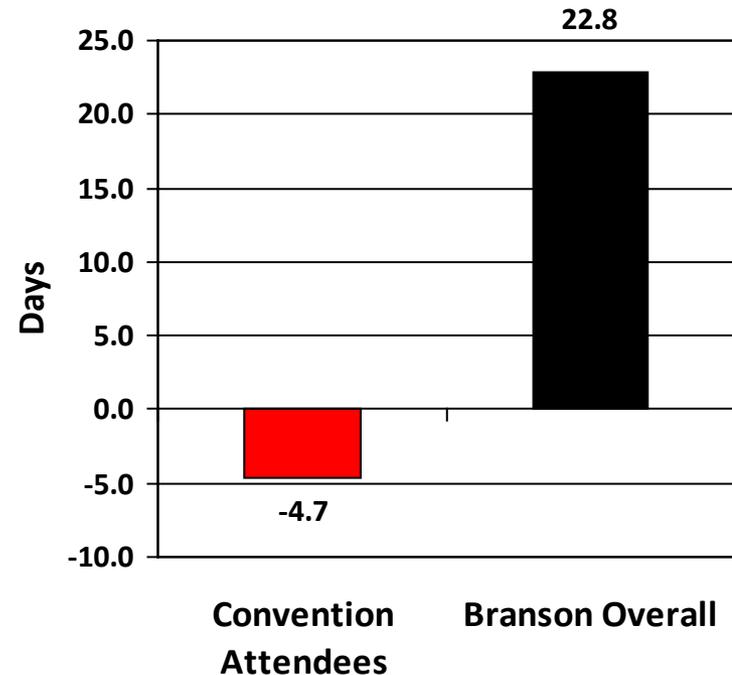
# Decision Time

Convention Center visitors spend an average of 95.4 days planning their trip to Branson—considerably higher than the 72.6 day average generated from Branson travelers as a whole.

### Comparison to Branson



### Variance to Last Year & Branson

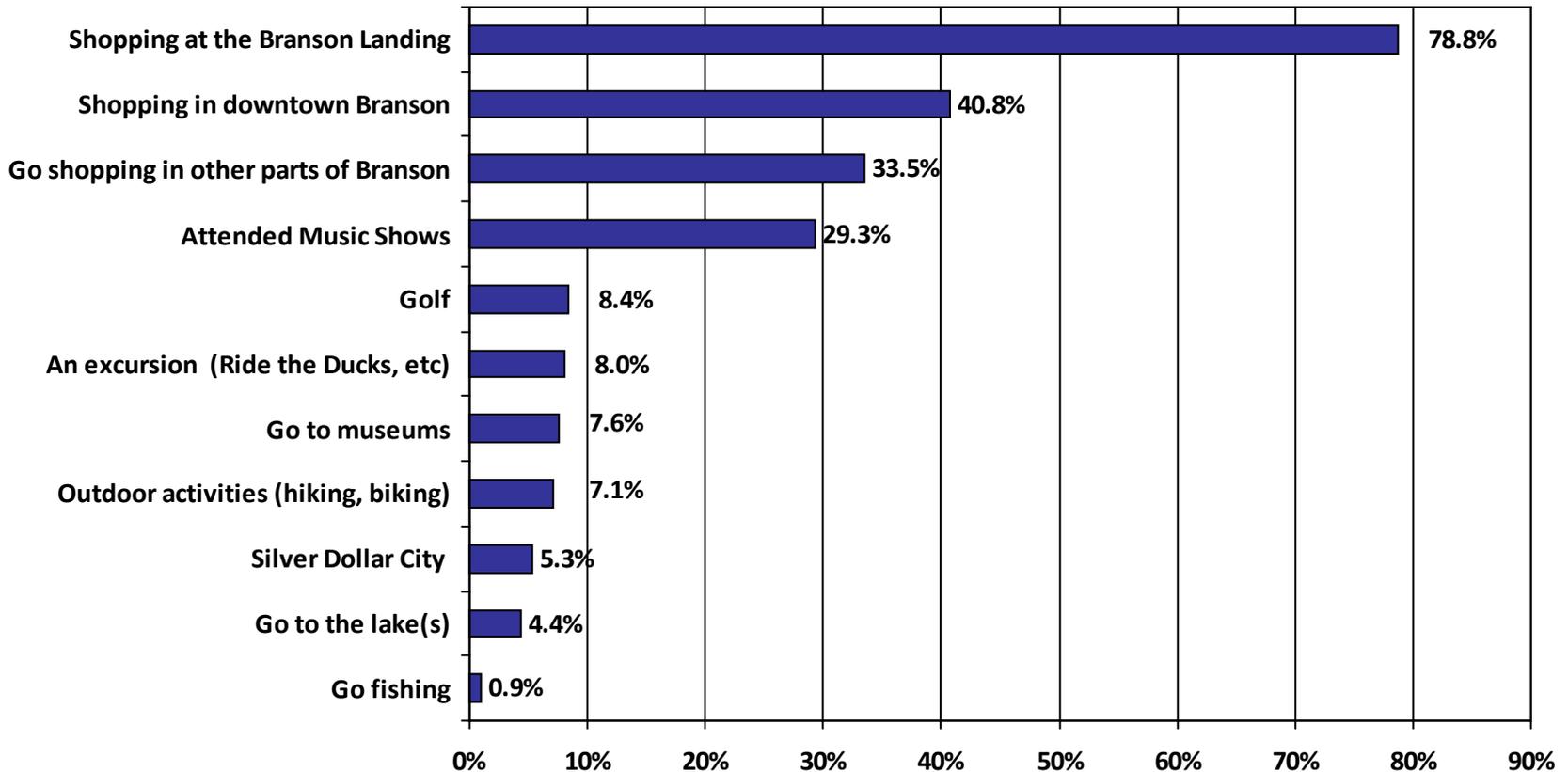


Convention attendees  
tend to **shop**, attend  
**Music Shows** or **play**  
**golf.**



# Activity Participation

Convention attendees are most likely to shop, attend music shows, and/or play golf.

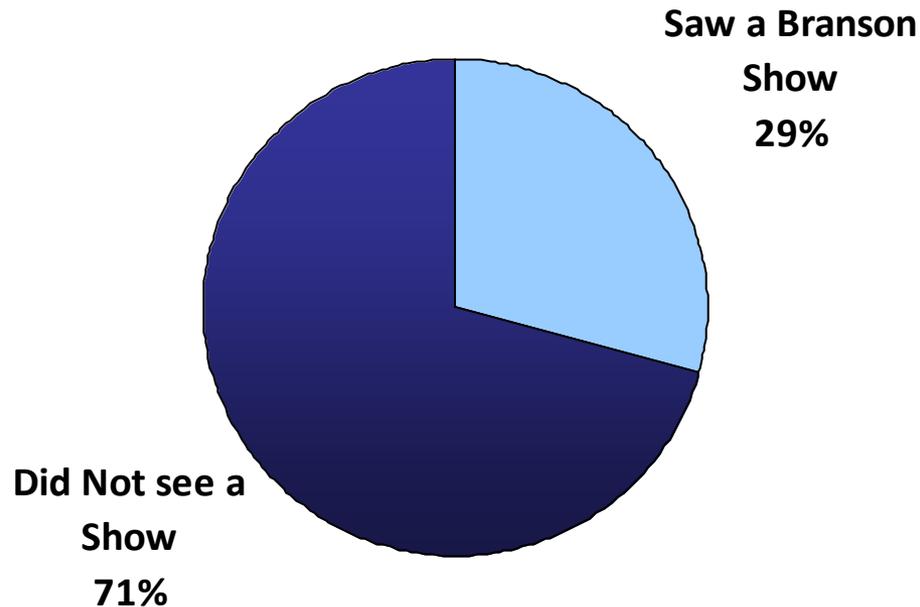


Nearly one-third of  
convention attendees  
**saw a show** while in  
town.



# Saw a Branson Show

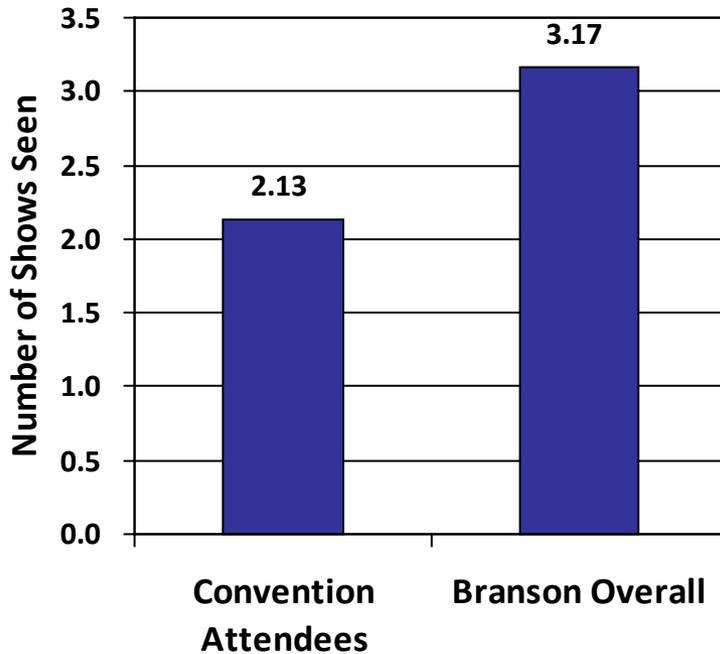
Nearly one-third (29%) of Branson Convention Center visitors attended a show during their stay, down from 45% last year.



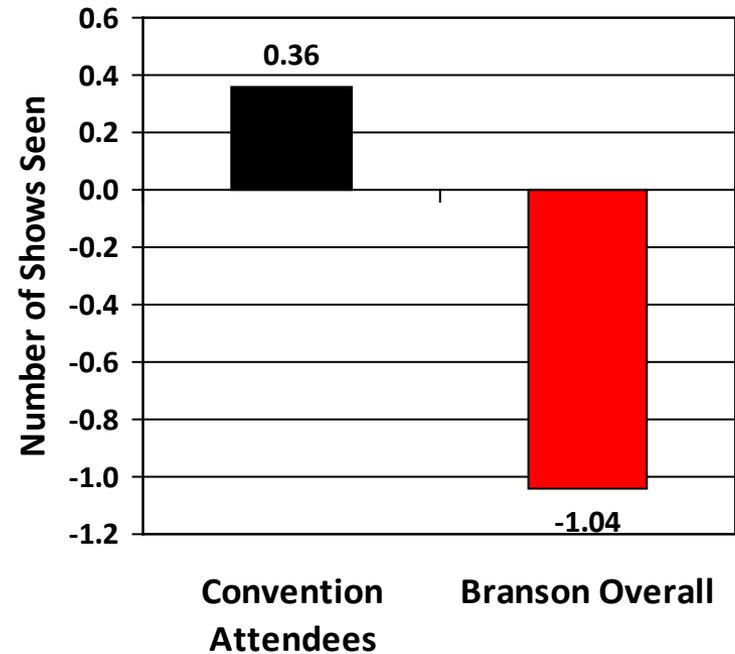
# Number of Shows Seen

Those Convention Center visitors who did see shows, however, saw an average of 2.1 shows per visit –up from 1.8 shows last year.

### Comparison to Branson

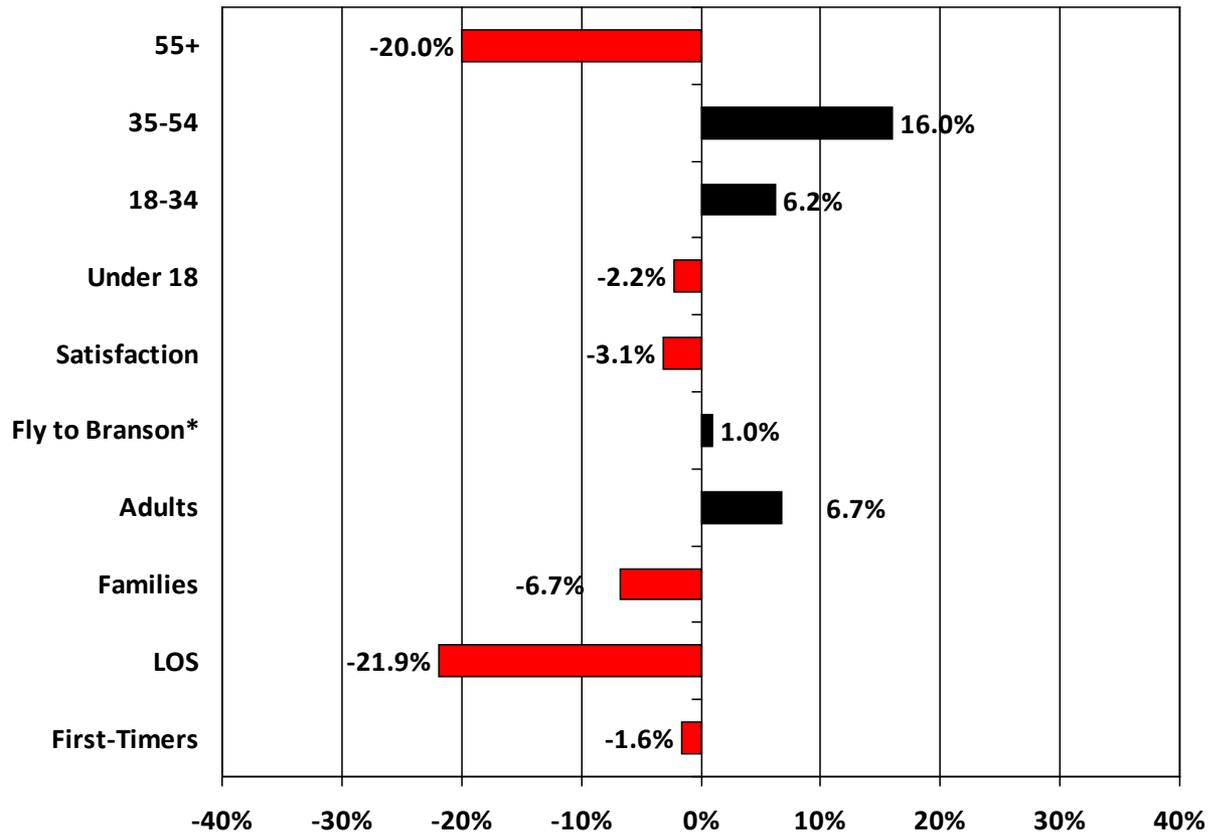


### Variance to Last Year



# Convention Center Visitor Profile Compared to Average Branson Visitor

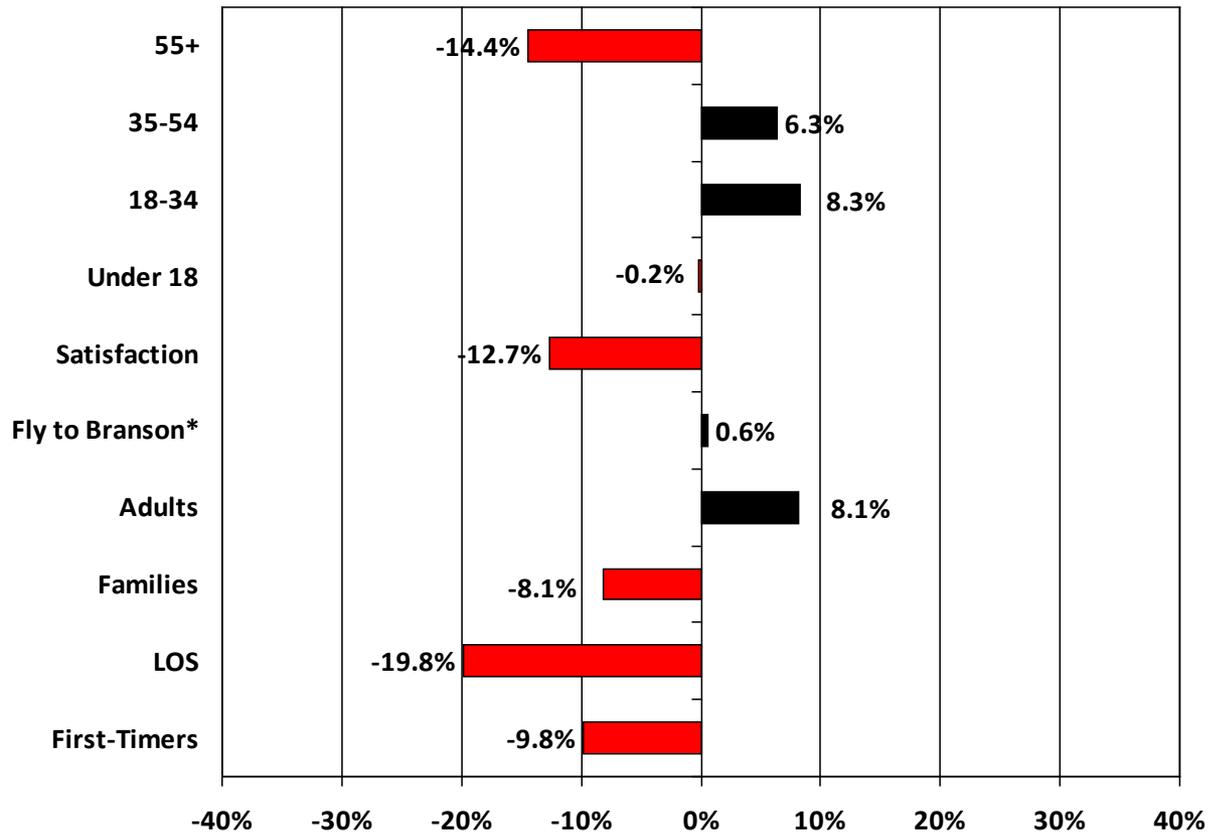
Relative to Branson visitors in general, Convention Center visitors are more likely to be 18-54 years old, have no children with them and be repeat visitors to the area.



\*Branson Airport

# Convention Center Visitor Profile Compared to Last Year

This year's convention center attendee was younger and less likely to have children with them than last year's attendees.



\*Branson Airport

# 2

## Assessment of Convention Attendee Value

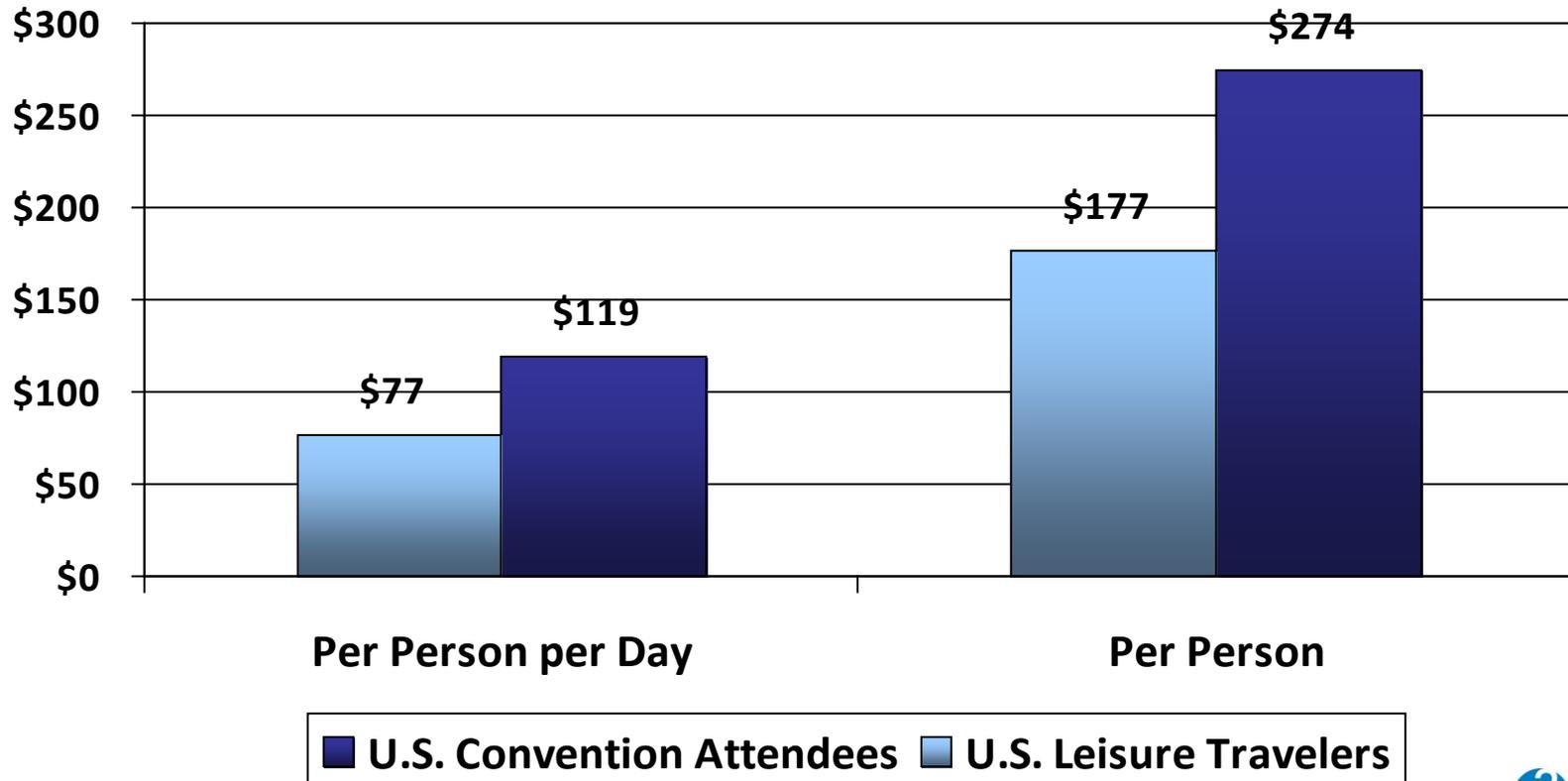
# Examining the Value of Convention Attendees

---

- It probably comes as no surprise that convention attendees, on a per person basis, spend considerably more than the average Branson visitor. According to the U.S. Travel Association, convention attendees nationwide spend 55% more than the average leisure traveler on a per person basis. The data in this study indicates that Branson's convention attendees also spend considerably more per person (+\$90 or +36%) than the average leisure visitor.
- Much of this incremental spending goes for lodging because as mentioned previously most convention attendees stay at the convention hotel which, on average, has a higher ADR than the average area hotel. However, even when these expenditures are removed from the equation it is estimated convention center visitors still spend about 11% more than the average visitor.
- Convention attendees stayed fewer nights in Branson this year and saw fewer shows. But, those who saw shows saw nearly 0.4 (+20%) more shows per person and nearly 40% of the shows seen were outside of the immediate downtown area. Altogether, the average attendee spends \$75 per person in Branson outside of the immediate downtown area, consistent with last year's spending.

# U.S. Travel Association's Estimate of Convention Attendee Spending Per Person

According to the U.S. Travel Association, the average convention attendee spends \$274 per person on their travel compared to \$177 per person among the average leisure traveler.

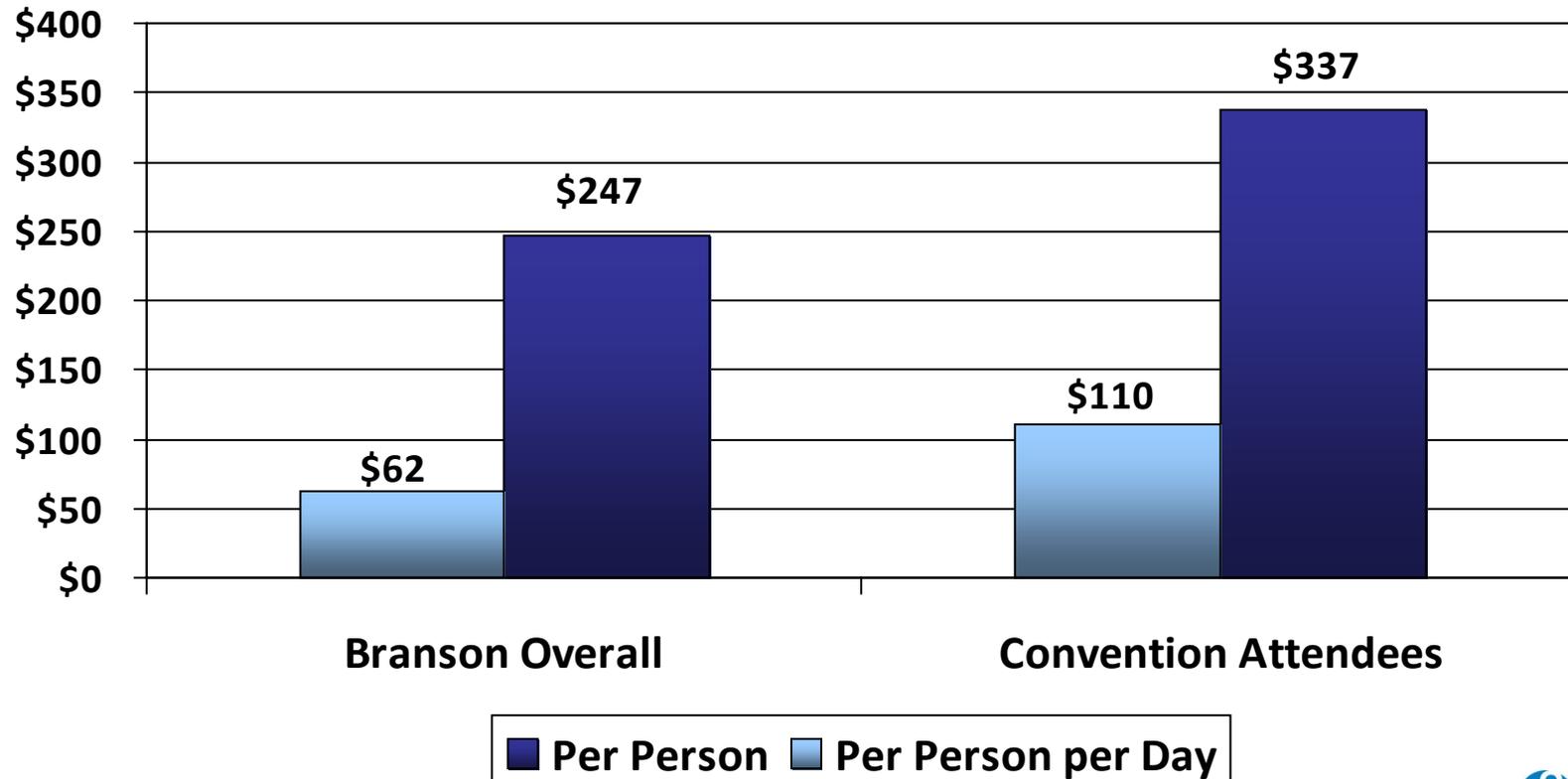


As is **true nationwide**,  
convention attendees **spend**  
**much more** per person  
in Branson than does the  
**average leisure traveler.**



# Branson Spending Per Person Comparison

As is true nationwide, the average Hilton Convention Center visitor spends significantly more per person (+36%) during their stay than the average Branson visitor.



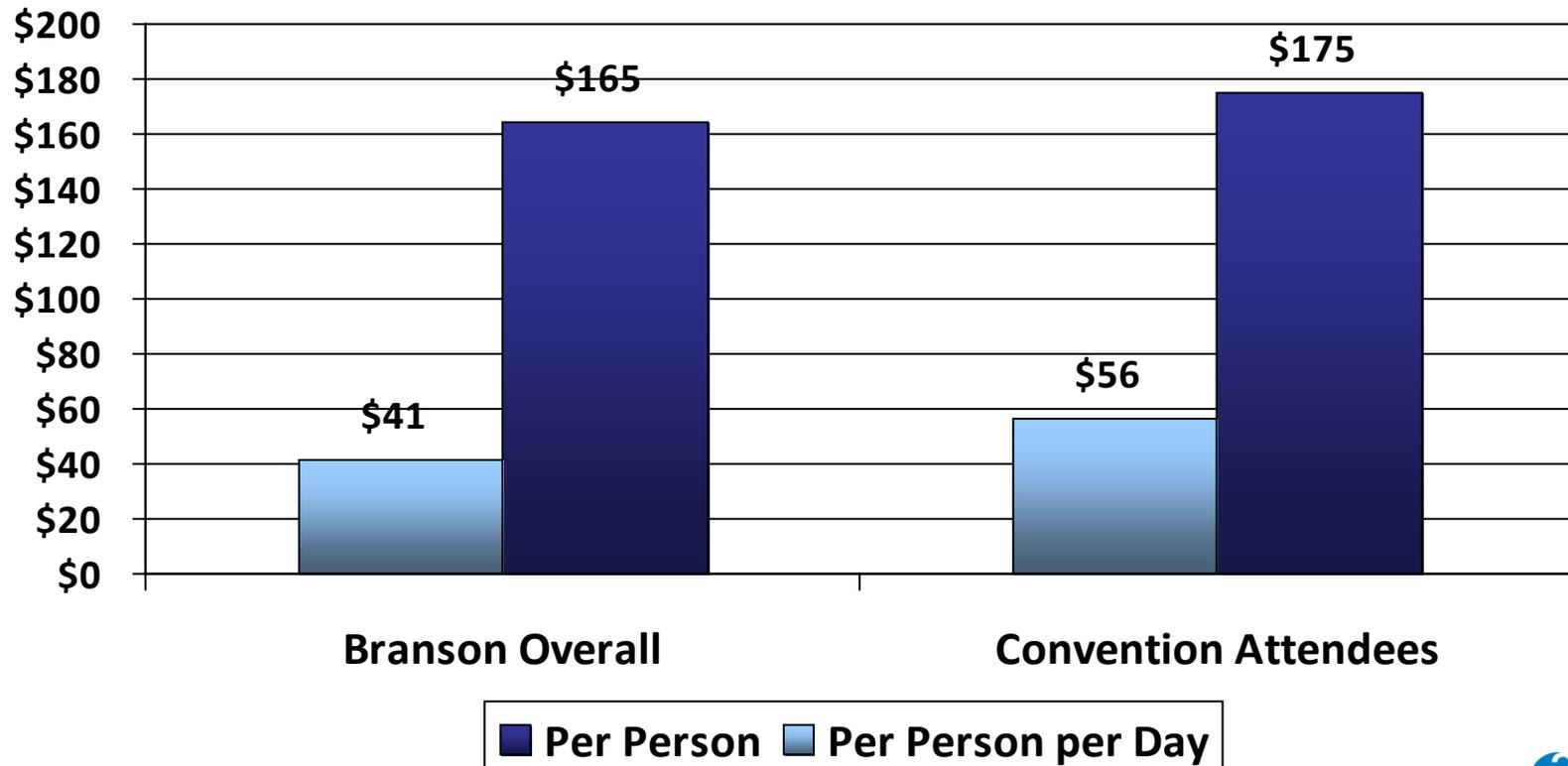
Even with estimated  
**lodging expenditures**  
**removed,**  
convention/meeting attendees  
still **spend more** than the  
average Branson traveler.



# Spending Per Person WITHOUT LODGING EXPENDITURES

Convention/meeting attendees spend considerably more on lodging than the average Branson visitor. However, even if these expenditures are removed, convention/meeting travelers still spend more (+7%) than average per person and considerably more on a per person per day basis.

\*It is estimated \$130/night on lodging or \$406 overall compared to Branson's average of \$77/night, or \$307 overall.

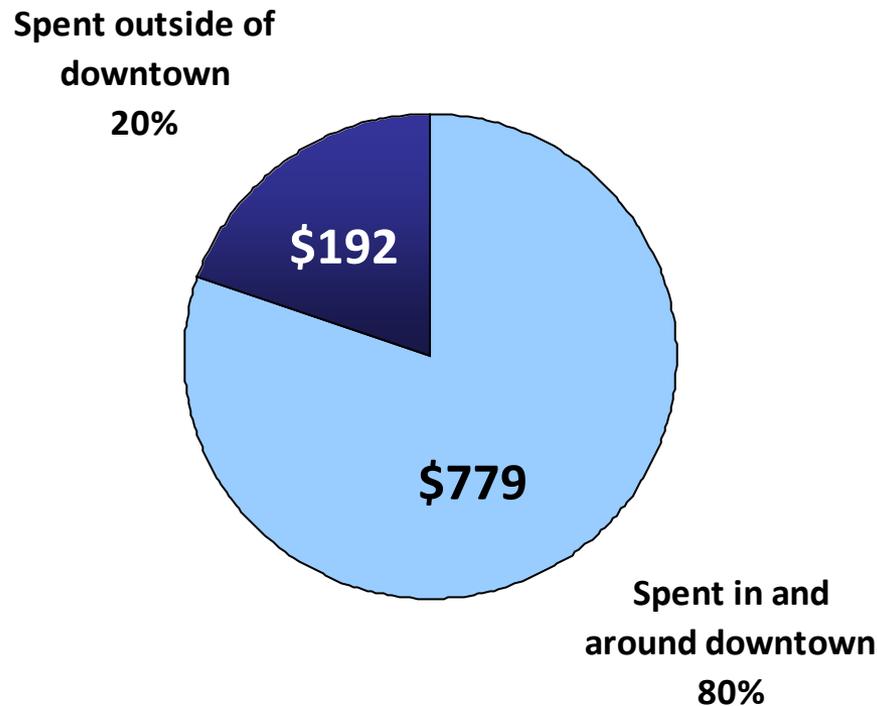


One-fifth (**20%**) of  
convention attendees'  
expenditures are **spent**  
**outside** of the immediate  
**downtown**  
**Branson** area.



# Expenditures Spent Elsewhere in Branson

One-fifth of those expenditures, or \$192 per party, is spent outside of the immediate downtown area.

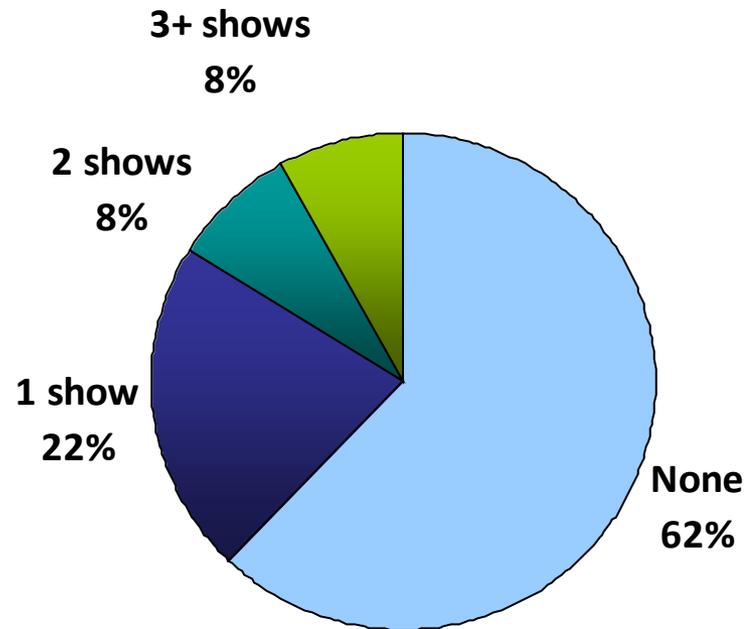


More than **one-third** of those who see shows, attend **shows outside** of the immediate **downtown** area of Branson.



# Number of Shows Seen OUTSIDE OF DOWNTOWN

Of those convention center visitors who saw a Branson show, more than one-third (38%) saw at least one show outside of the immediate downtown area.



# Estimating Economic Impact

---

- While projections of economic impact are well beyond the scope of this study, the basic building blocks provided in the research make it theoretically possible to provide some broad projections.
- According to the nationwide advertising effectiveness study conducted for the Branson CVB in the fall of 2011, it is estimated that 0.8% of Branson's overnight visitors over the past year attended a convention/meeting on their last visit. Multiplied across the 4.6 million overnight visitors Branson hosts annually, this equates to nearly 37,900 visitors. Extrapolated across these visitors' average spending of \$350, this equates to \$13.3 million, down slightly from last year's \$15.8 million projection.
- By comparison, this figure is larger than the estimated economic impact generated from every group segment except reunions (\$14.6 million). Veteran groups generated an estimated \$11.3 million, church groups produced \$7.0 million and professional group tour visitors generated \$7.6 million.

# Projected Economic Impact by Key Branson Niche

Branson Niche Segment	% of Total	Est. Visits	Spending/ Person	Economic Impact
Conventions/Meetings*	0.8%	37,900	\$350	\$13.3 M
Reunions et al	1.4%	63,200	\$231	\$14.6 M
Church Groups	1.1%	50,100	\$140	\$7.0M
Veteran Groups (Not Included in Reunions)	1.2%	56,200	\$201	\$11.3 M
Professional Group Tours	0.9%	41,700	\$181	\$ 7.6 M

\*2011 Advertising Effectiveness Study. All other data in this slide comes from Branson's Monthly Intercept Study.

**3**

**Branson's 2011  
Market  
Performance**

# Branson's 2011 Performance

---

- Branson experienced a challenging year in 2011. According to research efforts conducted by both American Express and the Y-Partnership, Baby Boomers and Matures nationwide (who comprise the vast majority of Branson's visitation) were the first to cut back their spending when the Great Recession began several years back and these older travelers have been the slowest to begin spending again. As a result, Millennials and Gen X travelers comprise a larger share of the traveling public than they have in past years.
- Of course, the decrease in Baby Boomers and Matures has had a negative impact on Branson's performance this year.
  - Room demand is down by 9.7% year-to-date through October, the largest decrease (covering 9 months or more) on record;
  - Branson's 1% City Sales Tax revenues are up 1.2% through October;
  - Tourism tax is down 6.8% year-to-date through October;
  - And, the TCED tax is up 0.9% year-to-date through October.

# Branson's Room Demand

Variance

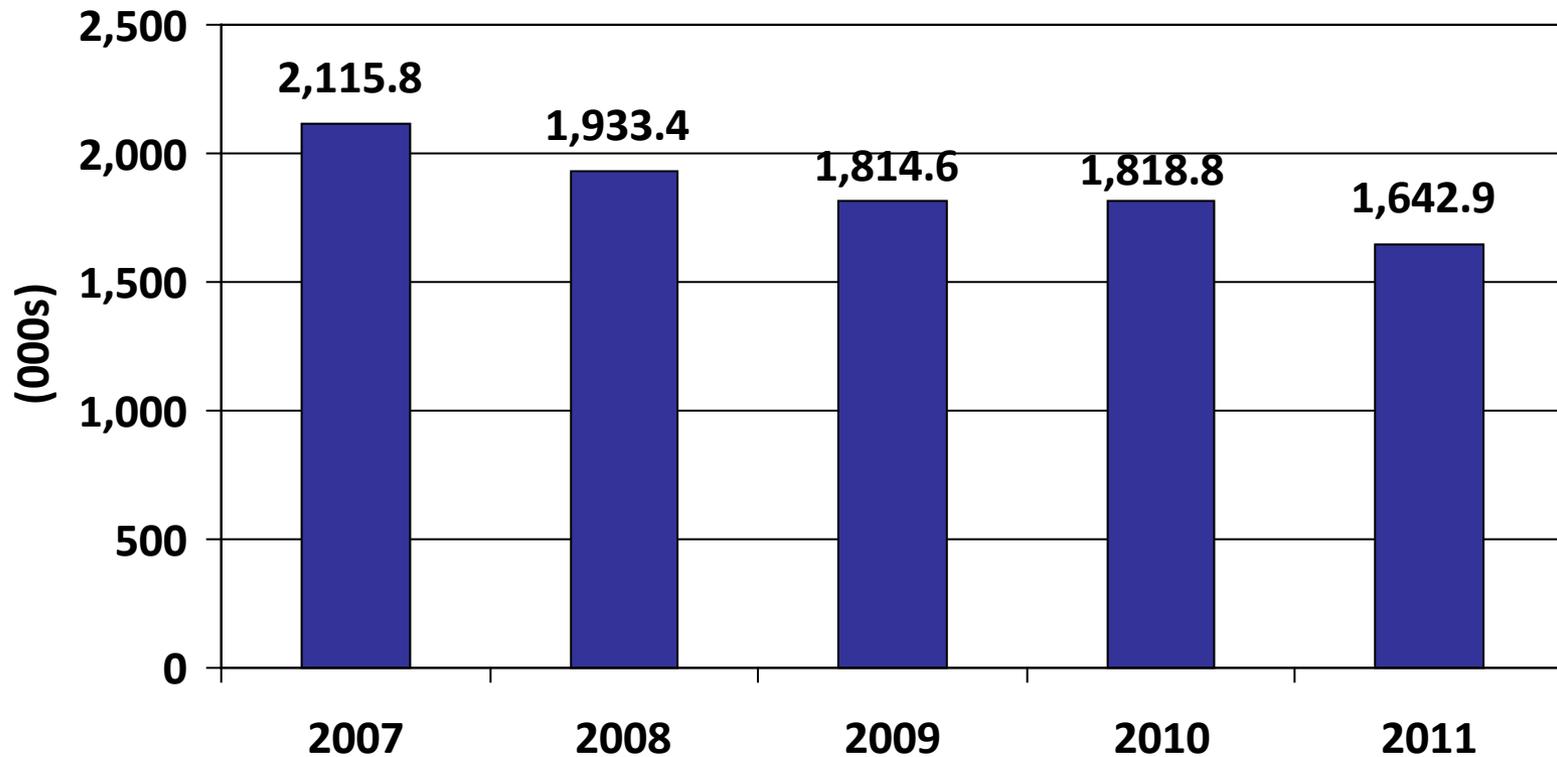
-0.1%

-8.6%

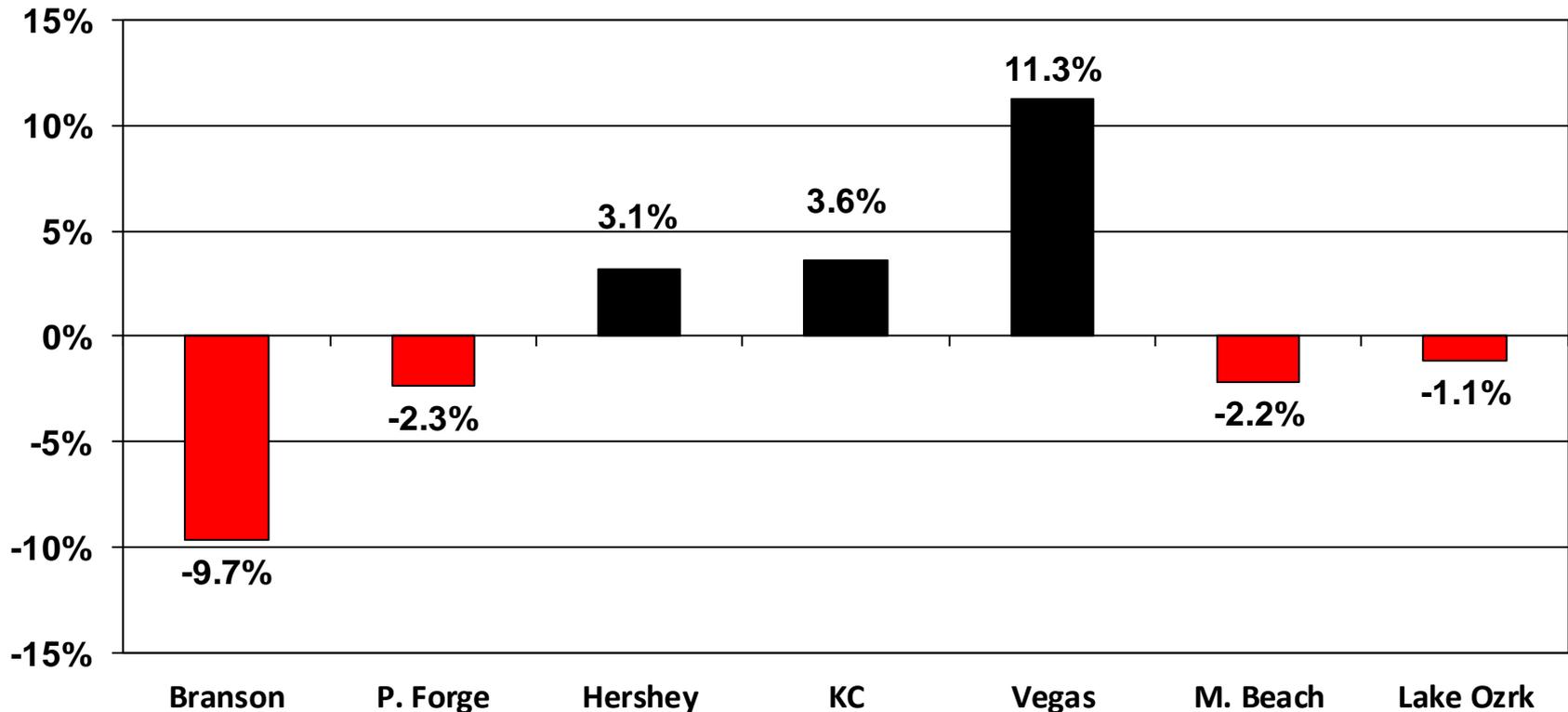
-6.1%

+0.2%

-9.7%



# Comparison of Room Demand Variance to a Sampling of Direct Competitors



Source: Smith Travel Research Lodging Outlook Newsletter, October 2011

# City of Branson 1% Sales Tax

Variance

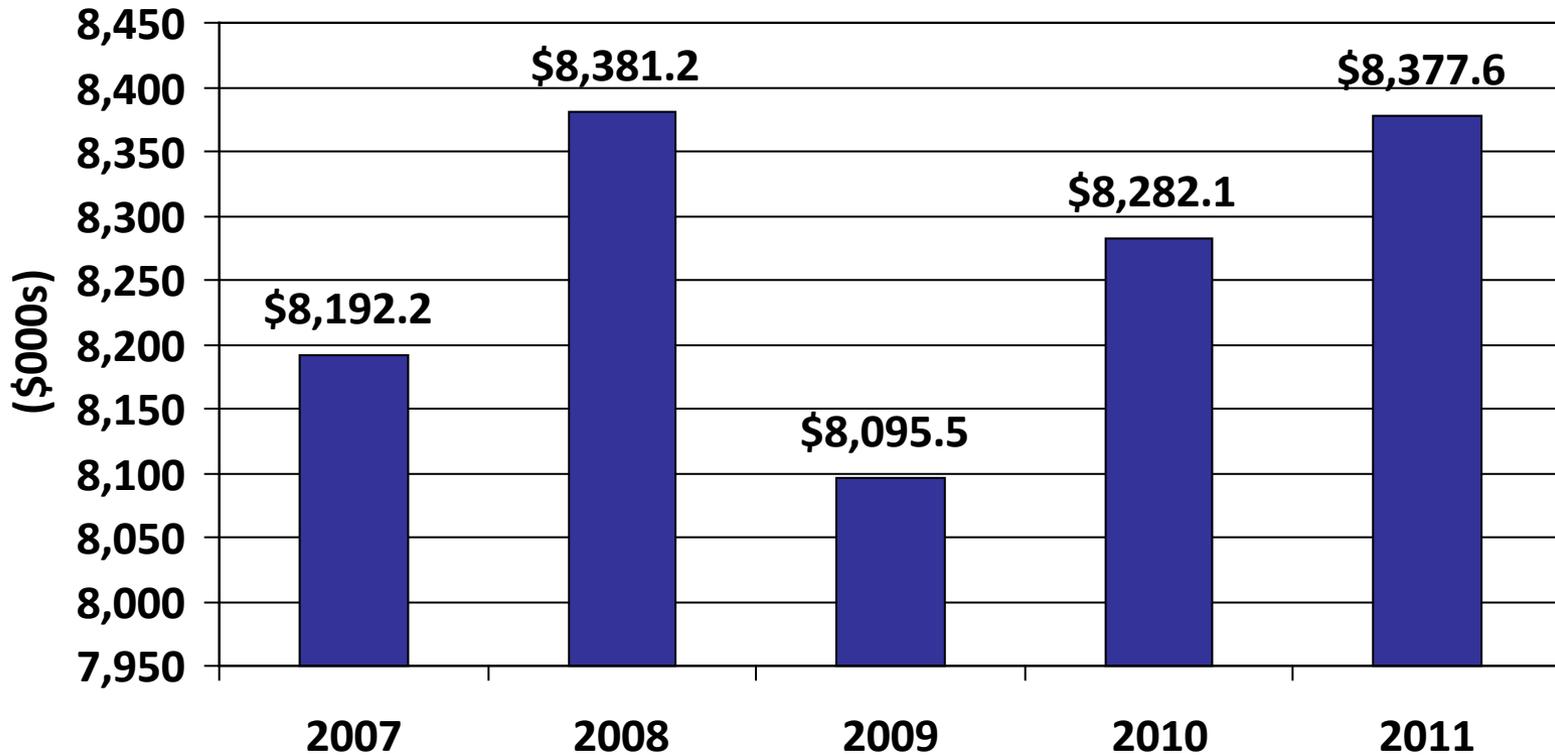
+8.1%

+2.3%

-3.4%

+2.3%

+1.2%



# City of Branson Tourism Tax

Variance

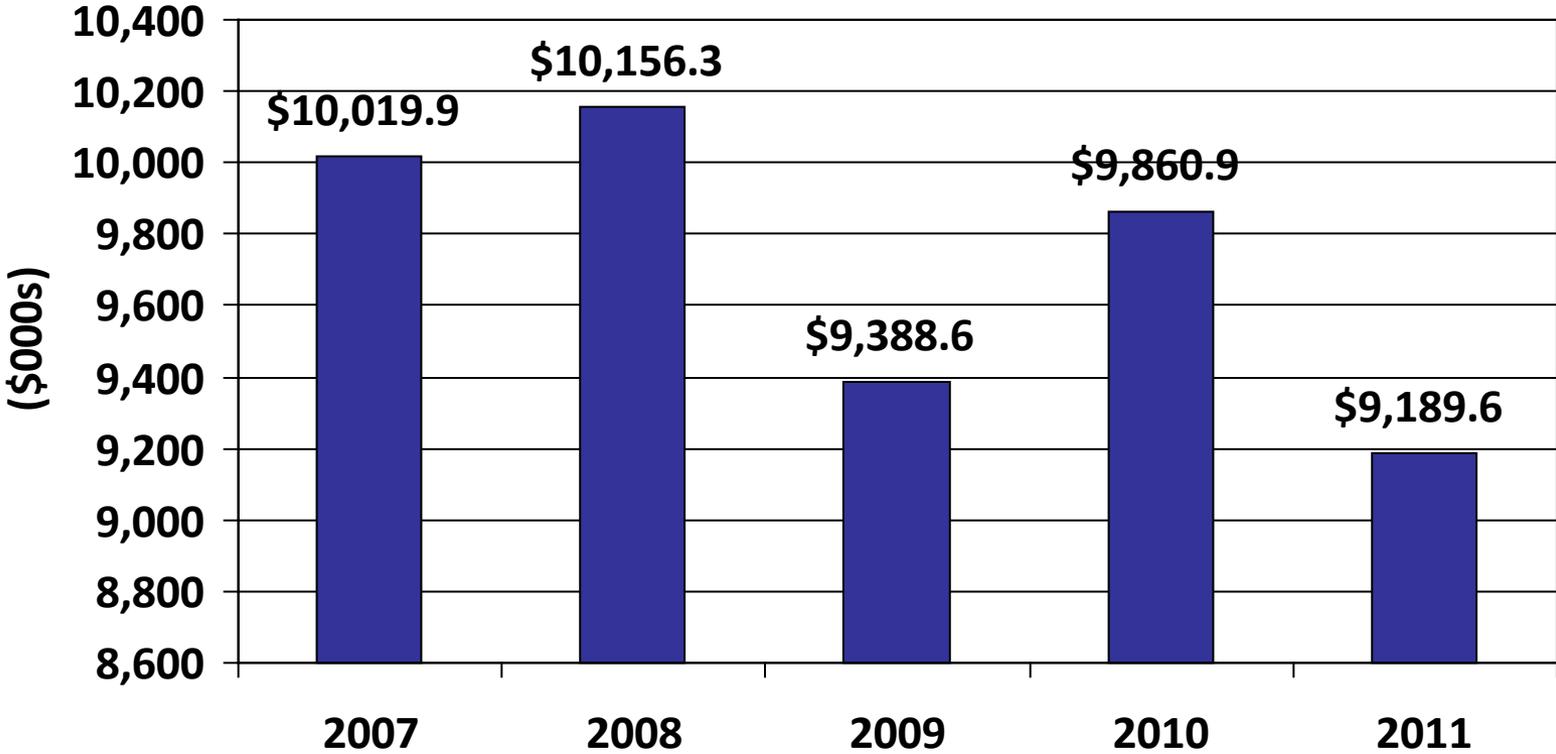
+7.8%

+1.4%

-7.6%

+5.0%

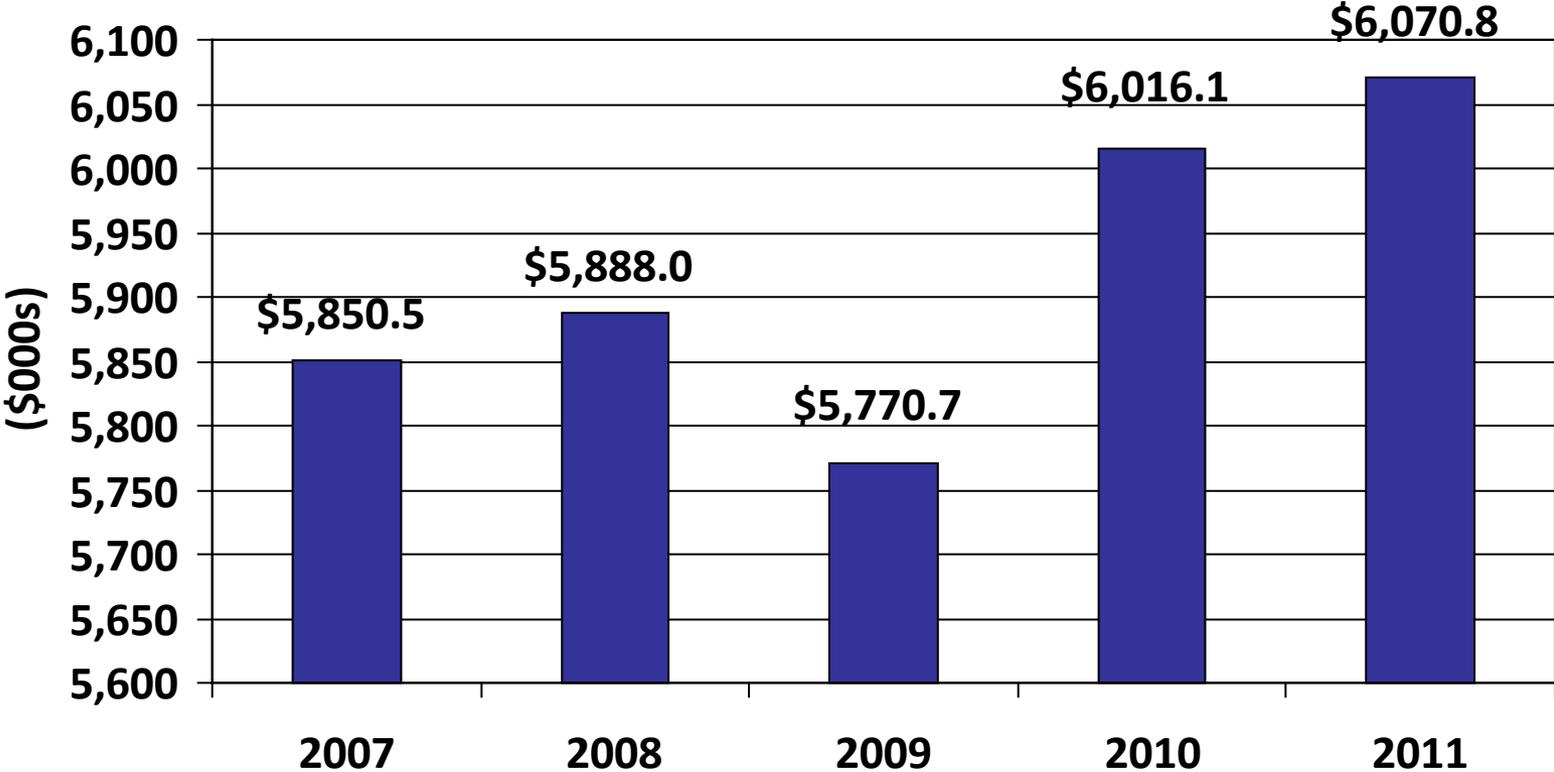
-6.8%



# TCED Tax

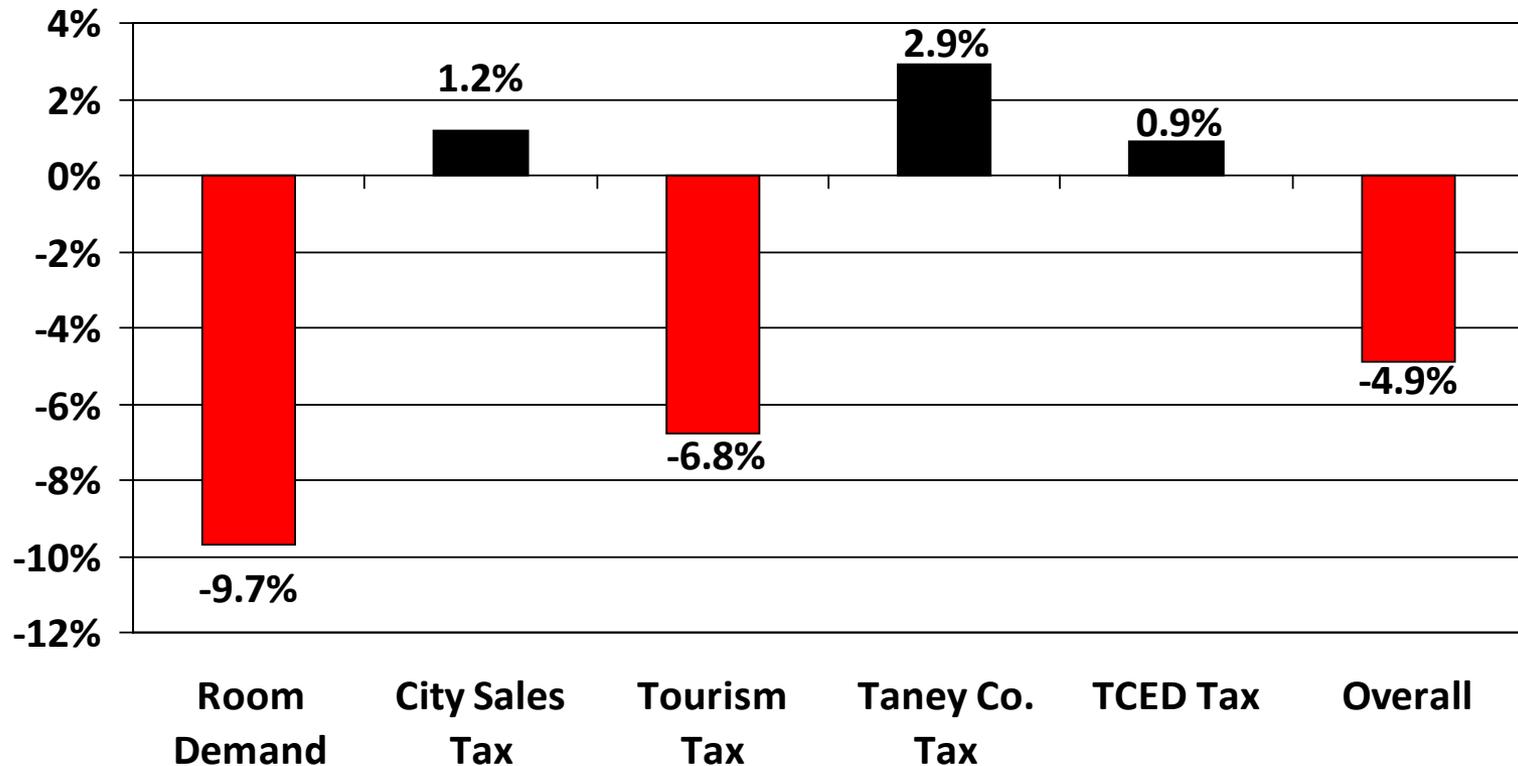
Variance

n/a      +0.6%      -2.0%      +4.3%      +0.9%



# Branson's Overall 2011 Performance

Branson is down 4.9% year-to-date through October.



**4**

## **Summary of Key Points**

# Key Observation Points

---

- **Within 300 Miles.** Six in ten of Branson Convention Attendees came from within 300 miles in 2011, a notable change from last year when the majority of attendees had traveled more than 300 miles.
- **Average Length of Stay.** Convention attendees stayed in Branson an average of 3.1 nights in 2011 compared to Branson's overall average of 4.0 nights and also down from last year's convention attendee average of 3.9 nights. However, this decrease is likely driven from the fact more attendees were visiting from within the region than nationwide this year.
- **More Repeat Business.** Over half of convention center attendees this year were repeat visitors who had previously visited the area in the past 2 years, up nearly 14 percentage points from last year. By comparison, 44% of Branson's overall visitor base are "repeat" visitors.
- **Younger Visitors.** Convention attendees (51.2 years) are considerably younger than the average leisure traveler who visits Branson (56.8 years).
- **More Likely to Fly In Than Average.** Most (88%) convention attendees drive to Branson. But, they are more likely to fly (9.8%) than the average Branson leisure visitor (5.8%).
- **Longer Planning Time.** Convention attendees take nearly a month longer to plan their Branson trips than the average leisure traveler, 95 days vs. 73 days among general leisure travelers to Branson.

# Key Observation Points

---

- **Many See Shows.** Nearly one-third (29%) of convention attendees saw a show while in town this year. And, while this ratio is down from 44% recorded last year, the average convention center attendee who saw shows took in an average of 2.1 different shows during their stay. This is up by nearly 0.4 shows (+20%) from last year. And, of those who see shows, nearly 40% say of convention attendees see shows outside of the immediate downtown area.
- **Convention Attendees Spend More.** As is true nationwide, convention attendees spend considerably more per person in Branson than does the average leisure traveler. Overall, convention center attendees spent an average of \$337 per person during their stay while the average leisure visitor spends \$247. Even with estimated lodging expenditures removed, convention/meeting attendees still spend 7% more in the area than the average Branson traveler.
- **Much of That Spending Extends Beyond Downtown.** One-fifth or 20% of convention attendees expenditures are spent outside of the immediate downtown Branson area. This equates to more than \$192 per party.

**Do More of What Works &  
Less of What Doesn't**



**4650 S. National Ave, STE B3 | Springfield, MO 65810 | 417-877-7808**