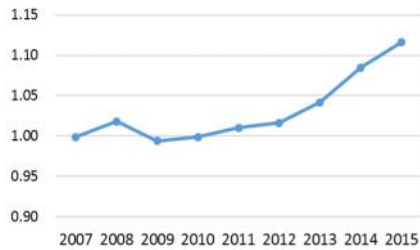
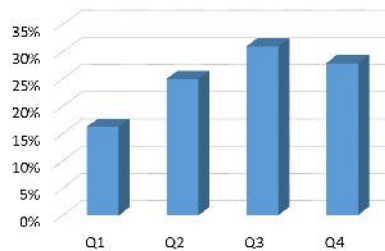


# Branson Market - Overview

Branson Retail Sales  
(in \$Billions)



Retail Sales Seasonality - 2015

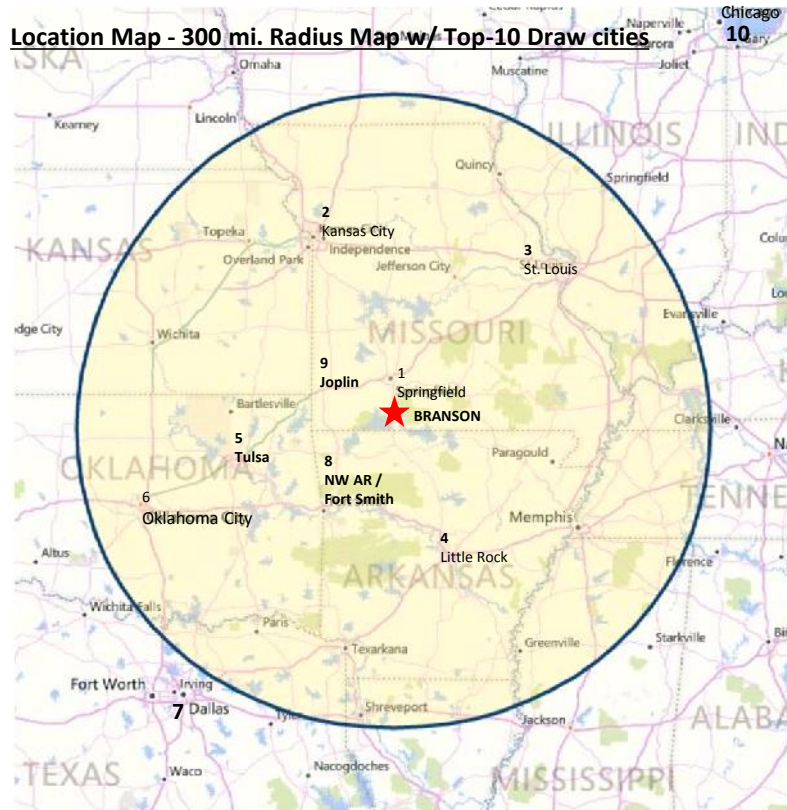


Branson is a popular Midwest tourist destination that attracts 8.5 million visitors annually:

- Trip Advisor ranks as 18<sup>th</sup> best U.S. vacation destination and #1 value destination
- Growing / Recession-resistant market:
  - retail sales grew an average of 3.2% in last 3 years (following only 2.8% decline during great recession)
  - \$300+ million new investments underway
  - \$80 million streetscape/promenade investment in Entertainment District underway (“Spirit of 76” project)
- 10 month-tourism season:
  - Spring/summer dominated by families
  - Fall/holiday dominated by adults and retirees; nationally known for Veteran’s Day celebration
  - Convention Center averages 200+ annual events and drew record 70,000 visitors in 2015
- Wide variety of entertainment/recreational attractions:
  - 40+ theaters; more theater seats than Broadway.
    - *New 2016 shows include “Million Dollar Quarter” and “Raiding the Country Vault” (country music version of #1 Vegas show)*
  - family-oriented attractions, including Silver Dollar City theme park, Hollywood Wax Museum, and Titanic museum.
    - *New 2016 attractions include Chicago Ferris Wheel, Harlem Globetrotters, Fitz’s Family Adventure*
  - three large/scenic lakes are a top destination for Midwest boating/fishing enthusiasts
  - 12 golf courses, including Bass Pro’s showcase “Top of the Rock” course, home to PGA Legends Tournament



# Branson Market - Tourism Data



“Spirit of 76” rendering



- Branson is Strategically located in the central United States:
  - within 1-day drive of 30% of U.S. population
  - ~90% of visitors drive to Branson
  - expanded air service to Branson Airport expected to expand Branson draw (only 4.4% of visitors flew in 2015). Non-stop service to Branson Airport from Denver, Dallas, Houston, Chicago, and Atlanta start summer 2016.
- Top 10 draw cities:
  1. Springfield, MO
  2. Kansas City, MO
  3. St. Louis, MO
  4. Little Rock, AR
  5. Tulsa, OK
  6. Oklahoma City, OK
  7. Dallas-Fort Worth, TX
  8. Northwest (Fort Smith), AR
  9. Little Rock, AR
  10. Chicago, IL
- Visitor Demographics:
  - Average age: 51.1 (predominantly families in Spring/Summer and adults/retirees in Fall/Holiday season). CVB now targeting 40-45 y/o parents for family trips
  - Average household income: \$81.5k
  - Average stay: 4.2 nights