EXPLORE BRANSON

VISITOR & MARKET PERCEPTION STUDY

Survey-based research on past visitors and non-visitors

JULY 16, 2026

Prepared by the Trove Tourism Development Advisors

Our Approach for Branson

Method 1:

Survey

- **Survey Planning & Design:** Definition of research objectives, survey structure, and methodology
- **Survey Deployment & Data Analysis:** Data collection, quantitative and qualitative analysis, and insight development
- **Final Survey Insights Report & Presentation:** Comprehensive findings and actionable recommendations presented to Branson

Method 2:

6 months of social sentiment analysis

Six Monthly Sentiment Analysis Reports - 15 January – 15 July 2026
Monthly social media sentiment reports, each accompanied by a presentation

Final Sentiment Analysis Report & Presentation - July 2026
Consolidated analysis covering all six months, including key trends, insights, and strategic implications

Links to Full Reports

Survey
110-page insights
25 pager
5 pager

Social sentiment
6 monthly reports

SECTION 1

Survey

Study Methodology

Survey design, sampling, and analytical approach

STUDY OBJECTIVES

This study evaluates awareness, perceptions, experiences, and future visit intent related to Branson, Missouri. Data is collected from individuals who have visited Branson and those who have not, enabling both experiential evaluation and market opportunity analysis.

- Understanding drivers of satisfaction and dissatisfaction among past visitors
- Evaluating the role of pricing, traffic, seasonality, and major attractions in destination appeal
- Assessing awareness and perception of Branson attractions
- Identifying opportunities to increase visitation and improve market positioning

TOTAL SAMPLE

N = 800

Combined visitor + non-visitor responses collected via online panel

PAST VISITORS

N = 499

Routed into the visitor survey path for experiential evaluation

NON-VISITORS

N = 301

Routed into the non-visitor path for awareness and perception analysis

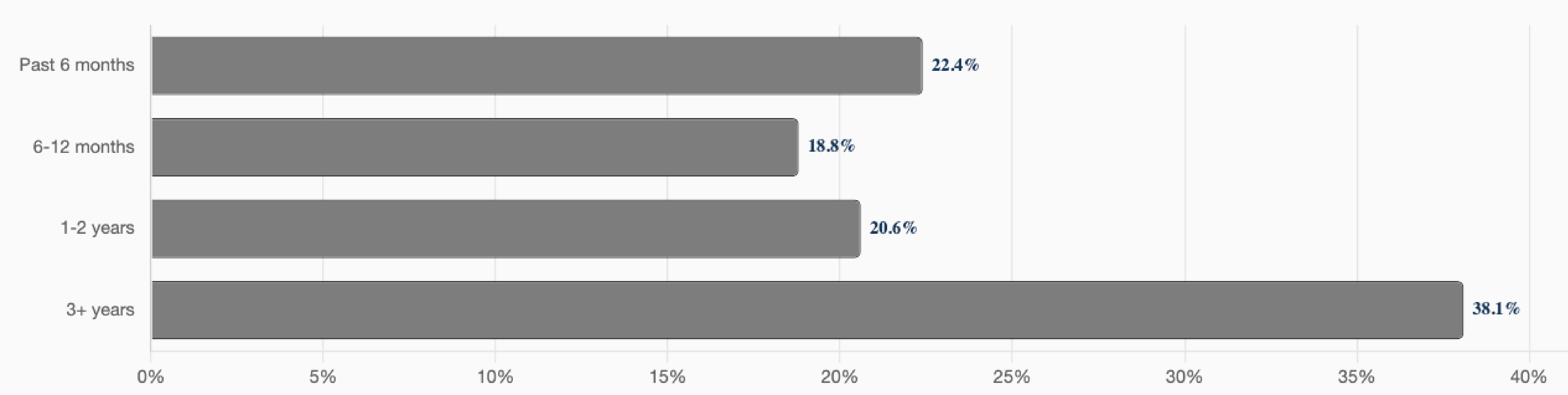
Source: Branson Visitor & Market Perception Study — Methodology Document

PART 01

Visitor Survey

Questions answered by past visitors to Branson · n = 499

When was the last time you visited Branson?



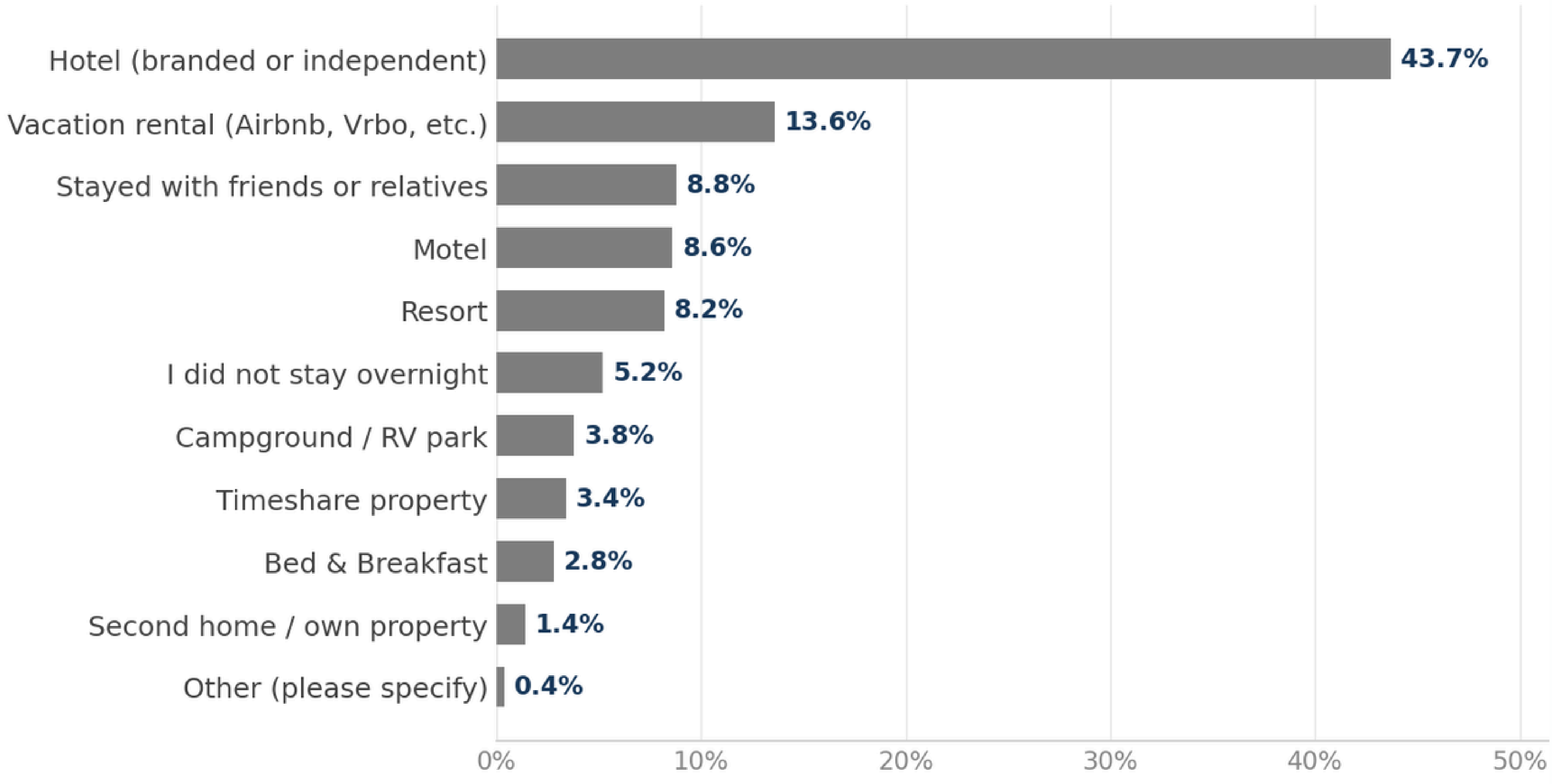
KEY TAKEAWAYS

01
Branson visitation skews toward lapsed travelers — 38% of past visitors last came more than 3 years ago, signaling a meaningful re-engagement opportunity.

02
Recent travel is healthy: roughly 22% visited within the past 6 months and another 19% within the past year, suggesting a strong base of active customers to build advocacy programs around.

Base: n = 499 respondents

Where did you stay during your most recent visit to Branson?



KEY TAKEAWAYS

01

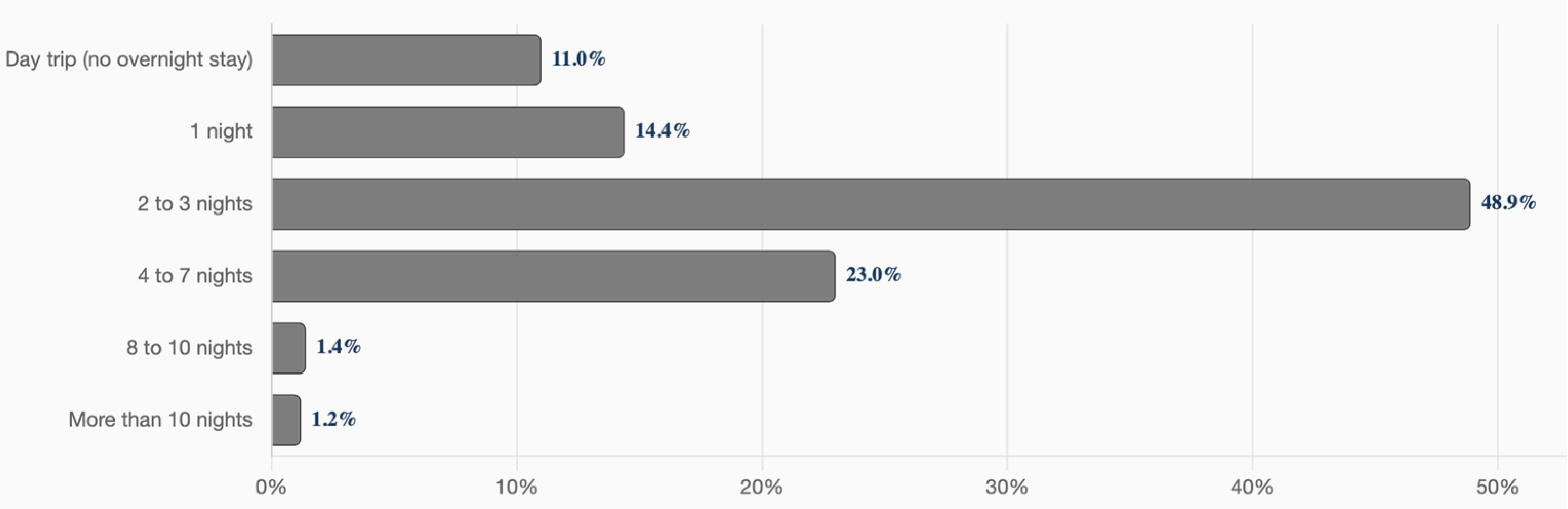
Hotels remain the dominant accommodation choice for Branson visitors, far ahead of vacation rentals and resorts.

02

Vacation rentals and resorts still capture a meaningful share, indicating room to grow alternative-lodging marketing especially for multi-generational and longer-stay groups.

Base: n = 499 respondents

How long did you stay in Branson on your most recent visit?



KEY TAKEAWAYS

01

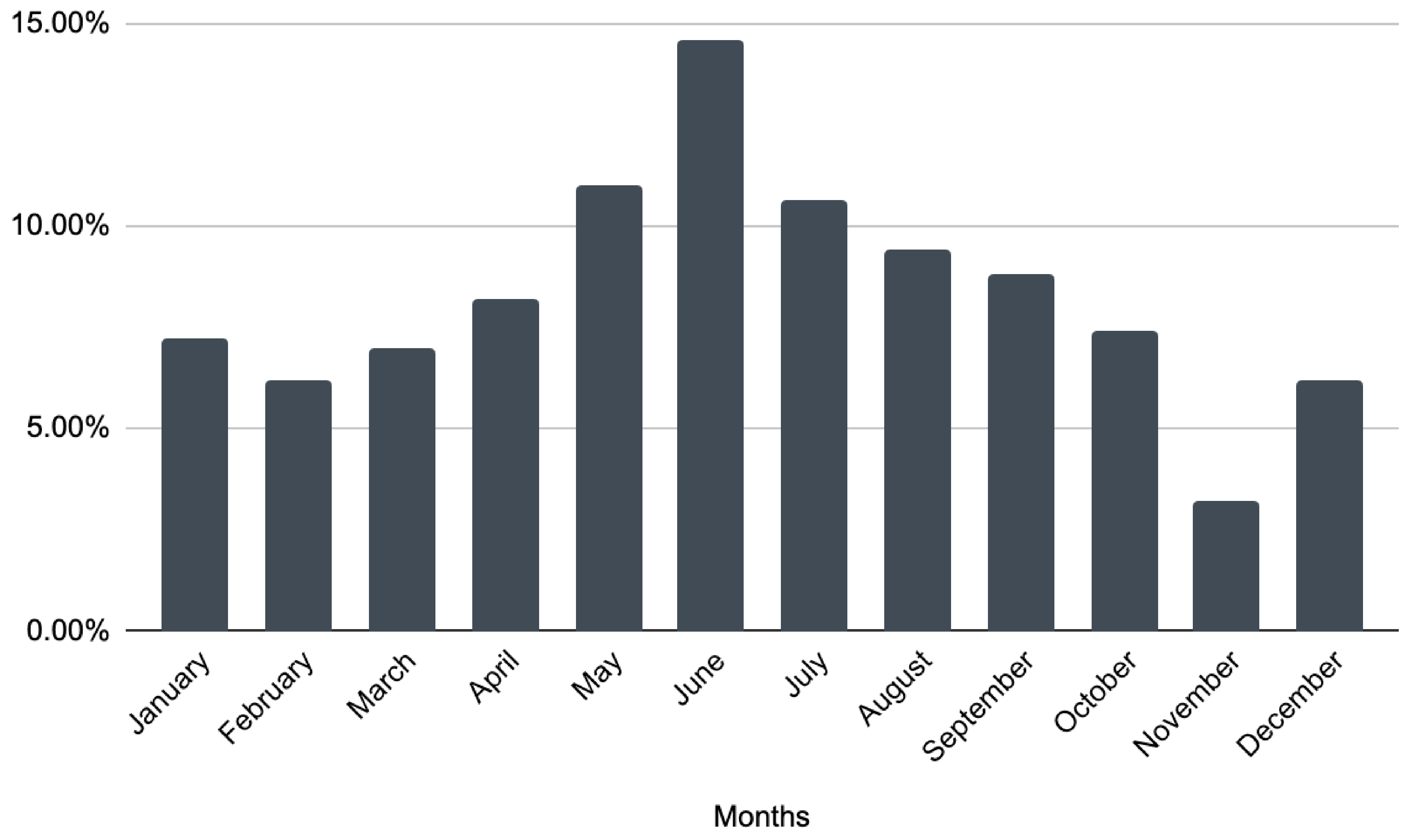
Short stays dominate the destination. Nealy half of visitors stay 2 to 3 nights, reinforcing Branson's positioning as a long-weekend, regional getaway rather than an extended-vacation destination.

02

Day-trippers and single-night visitors account for 25% combined, meaning a quarter of all visitors are leaving same-day or overnight only. A clear opportunity to convert them into multi-night stays through targeted lodging packages.

Base: n = 499 respondents

In what month was your last visit to Branson?



KEY TAKEAWAYS

01

Summer is the peak season, with June (15%), May (11%), and July (11%) leading the calendar. Visitation is heavily skewed toward warm-weather months.

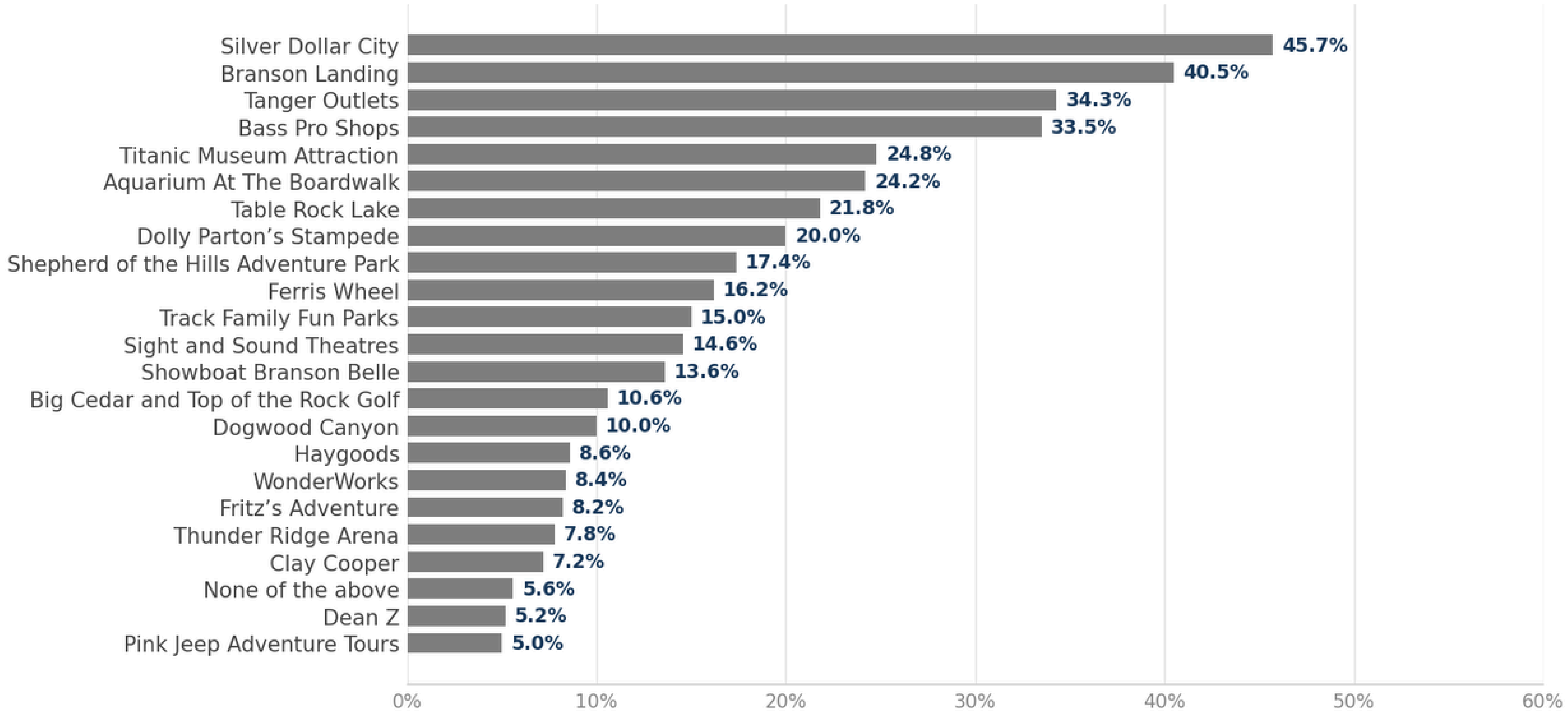
02

November (3%) and February (6%) emerge as the softest months, highlighting clear demand gaps that holiday programming and shoulder-season campaigns could address.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

Which of the following attractions or experiences did you visit during your stay in Branson?



Base: n = 499 respondents who answered (multi-select; bars sum to more than n)

KEY TAKEAWAYS

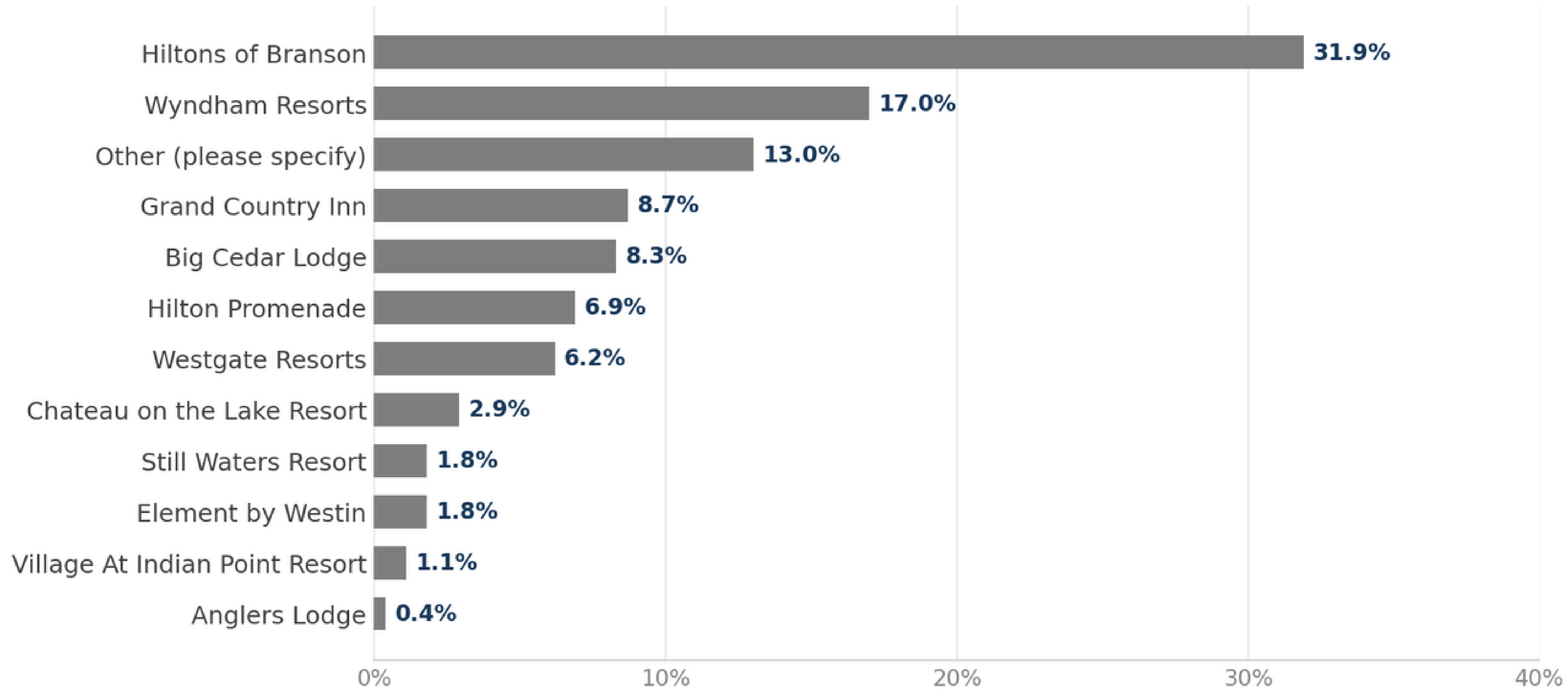
01

Silver Dollar City (46%) and Branson Landing (40%) anchor the visitor itinerary, confirming both as the two flagship attractions that visitors most reliably build their trip around.

02

Tanger Outlets (34%) and Bass Pro Shops (33%) round out the top tier of must-do stops, reinforcing that retail and shopping experiences play a major role alongside theme parks and theaters.

Which property did you stay at?



KEY TAKEAWAYS

01

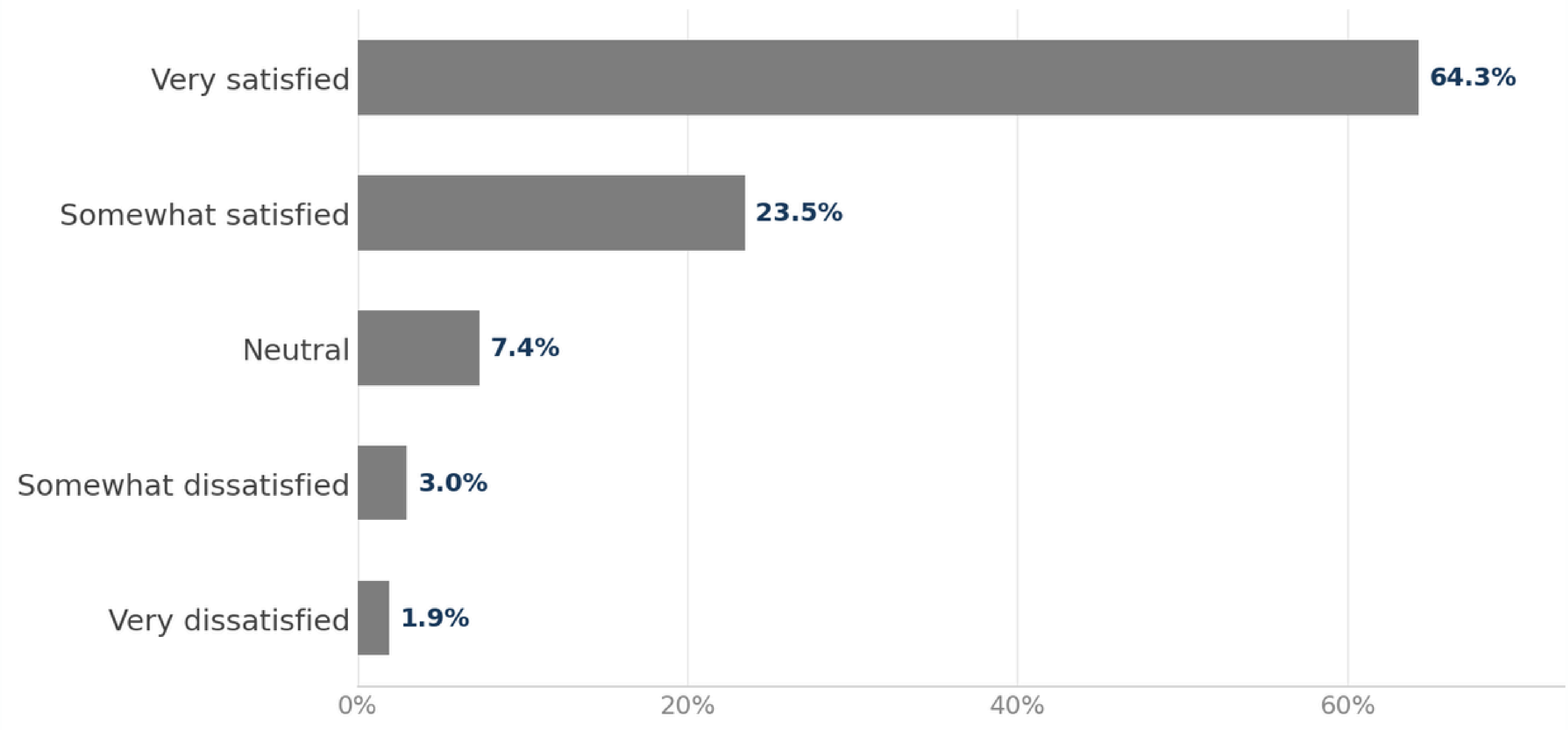
Hotel demand is highly concentrated among a small group of major properties, led by Hiltons of Branson (32%) and Wyndham Resorts (17%). This suggests that a limited number of hospitality partners play an outsized role in shaping the visitor experience and overall perception of the destination.

02

The top properties cluster around resort and convention-oriented brands, consistent with the dominant 2 to 3 night couple/family travel pattern seen elsewhere in the data.

Base: n = 276 respondents

Overall, how satisfied were you with your stay?



KEY TAKEAWAYS

01

Overall stay satisfaction is strongly positive. Very Satisfied + Satisfied combined cover the great majority of responses, indicating the lodging product broadly delivers.

02

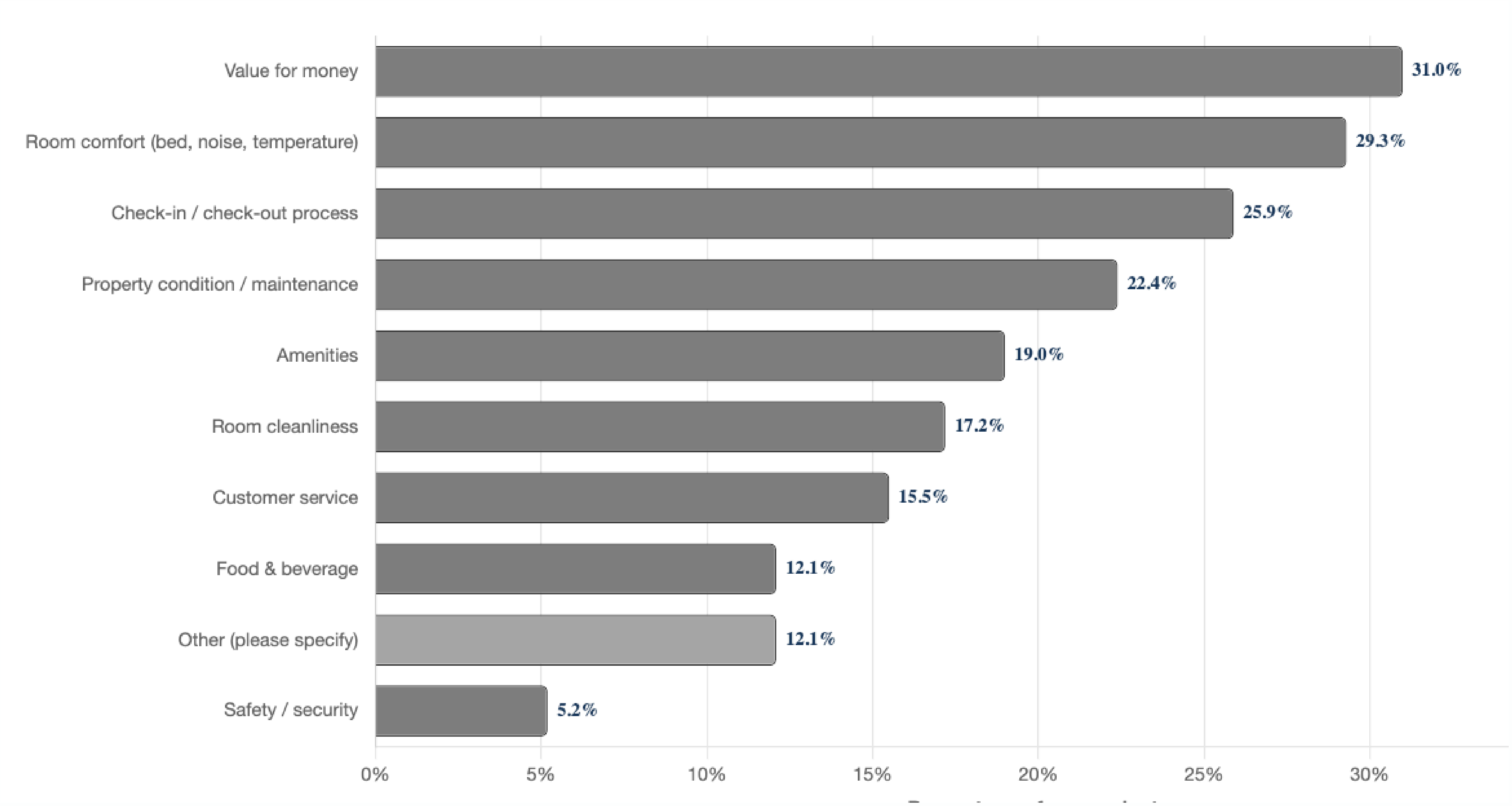
The Neutral and Dissatisfied segments are small but concentrated; targeted analysis at the property level is where the real improvement opportunities live.

13

Base: n = 473 respondents

What were the main issues during your stay?

Only people that answered somewhat dissatisfied and dissatisfied responded this question



KEY TAKEAWAYS

01

Cleanliness, value-for-money, and customer service top the list of stay issues. These align directly with the negative review themes seen in the parallel sentiment analysis.

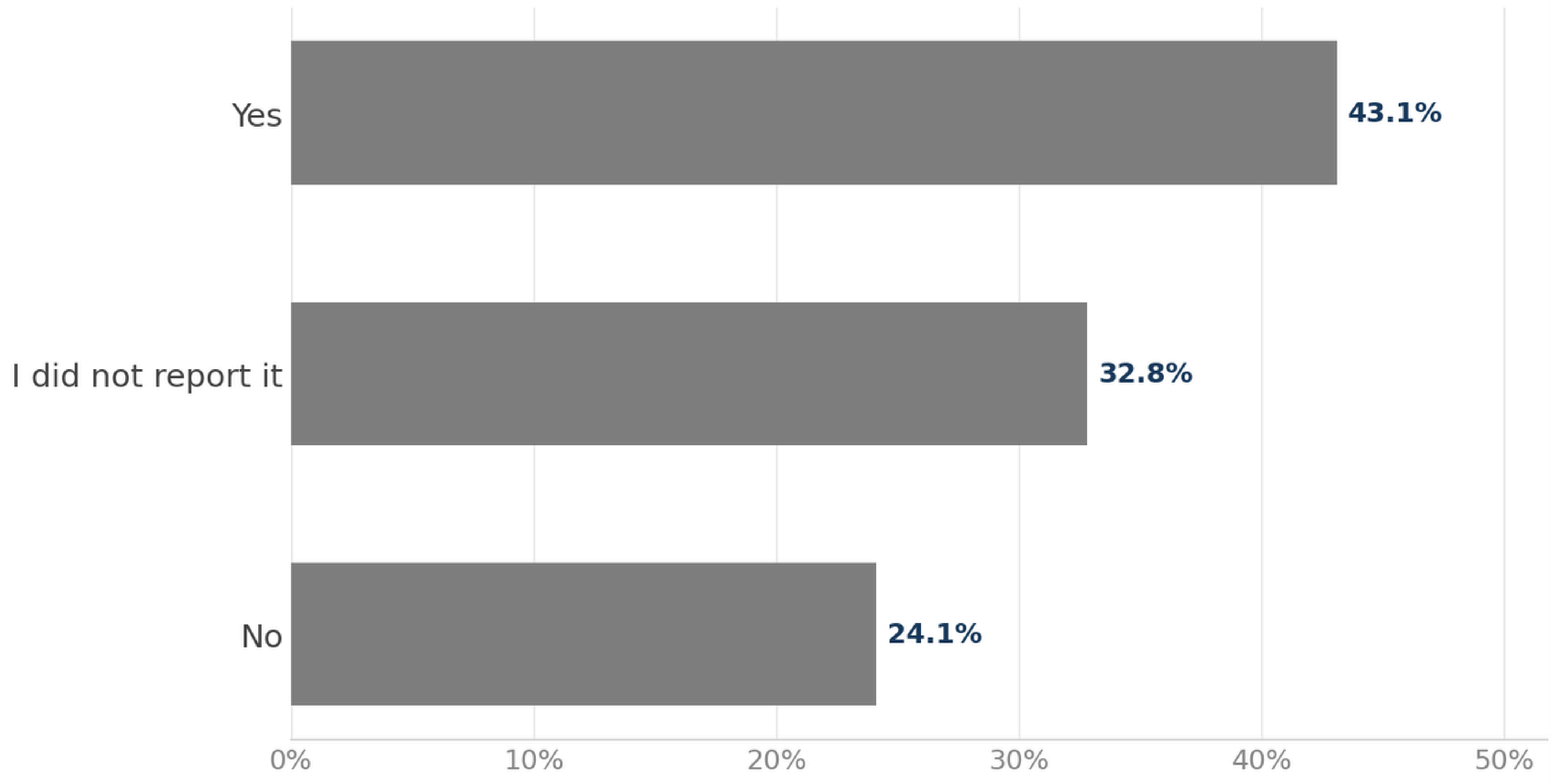
02

Issues are spread across many categories rather than concentrated in one, meaning lifting hotel satisfaction is less about fixing one thing and more about consistent service standards across the portfolio.

Source: Branson Visitor & Market Perception Study, March 2026 — Visitor sample (n=499)

Did the accommodation staff effectively resolve your concern?

Only people that answered somewhat dissatisfied and dissatisfied responded this question



KEY TAKEAWAYS

01

Where issues did arise, the majority of guests felt staff effectively resolved their concerns — reflecting reasonably strong service recovery culture in Branson lodging.

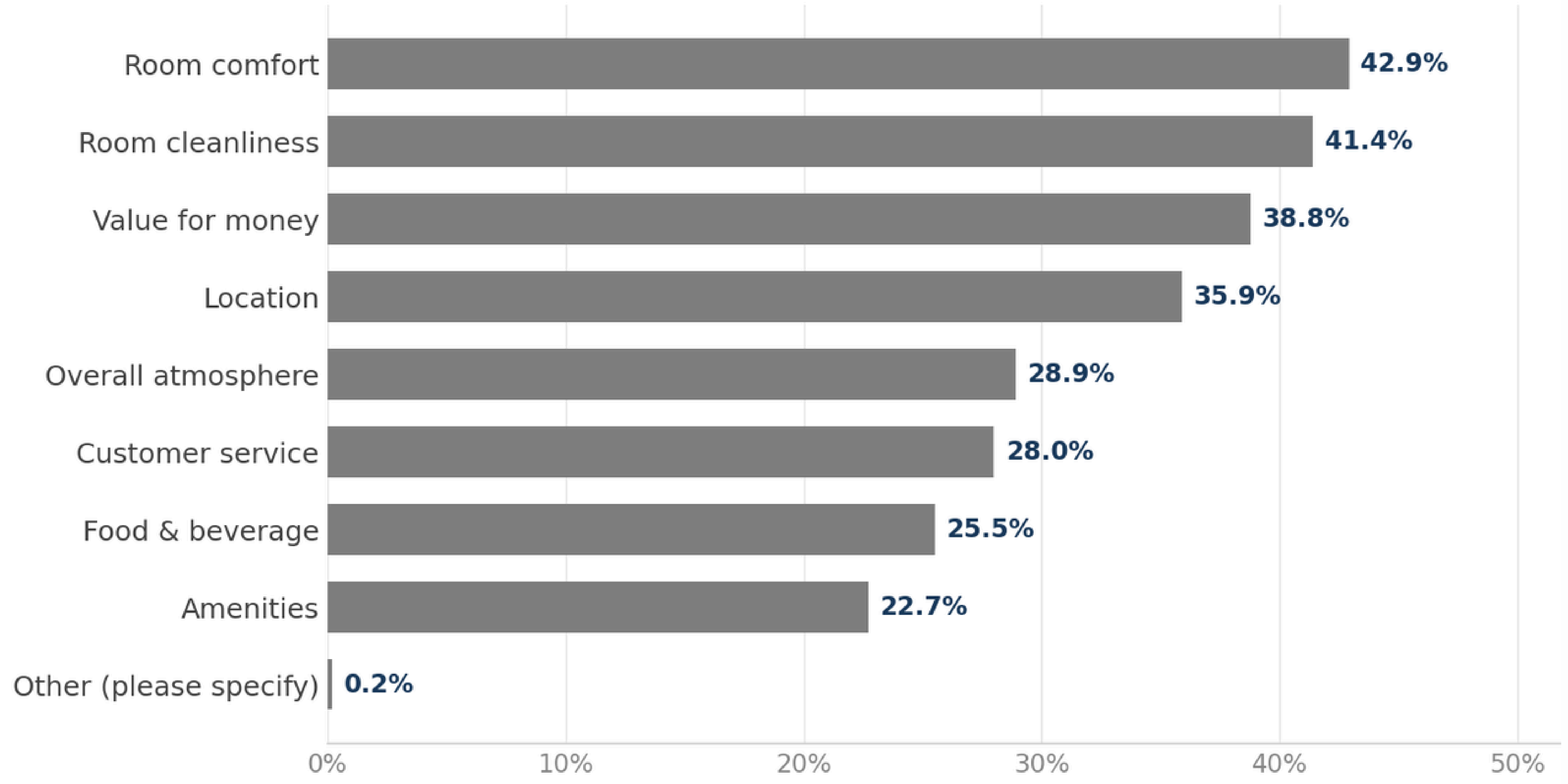
02

Still, the share of guests reporting unresolved concerns is non-trivial; closing this loop is the single fastest path to converting detractors into neutrals.

Base: n = 58 respondents

What contributed most to your positive experience?

Only people that answered very satisfied and satisfied responded this question



KEY TAKEAWAYS

01

Cleanliness, friendly staff, and comfortable rooms top the list of positive contributors, confirming the basics still drive the strongest emotional connection.

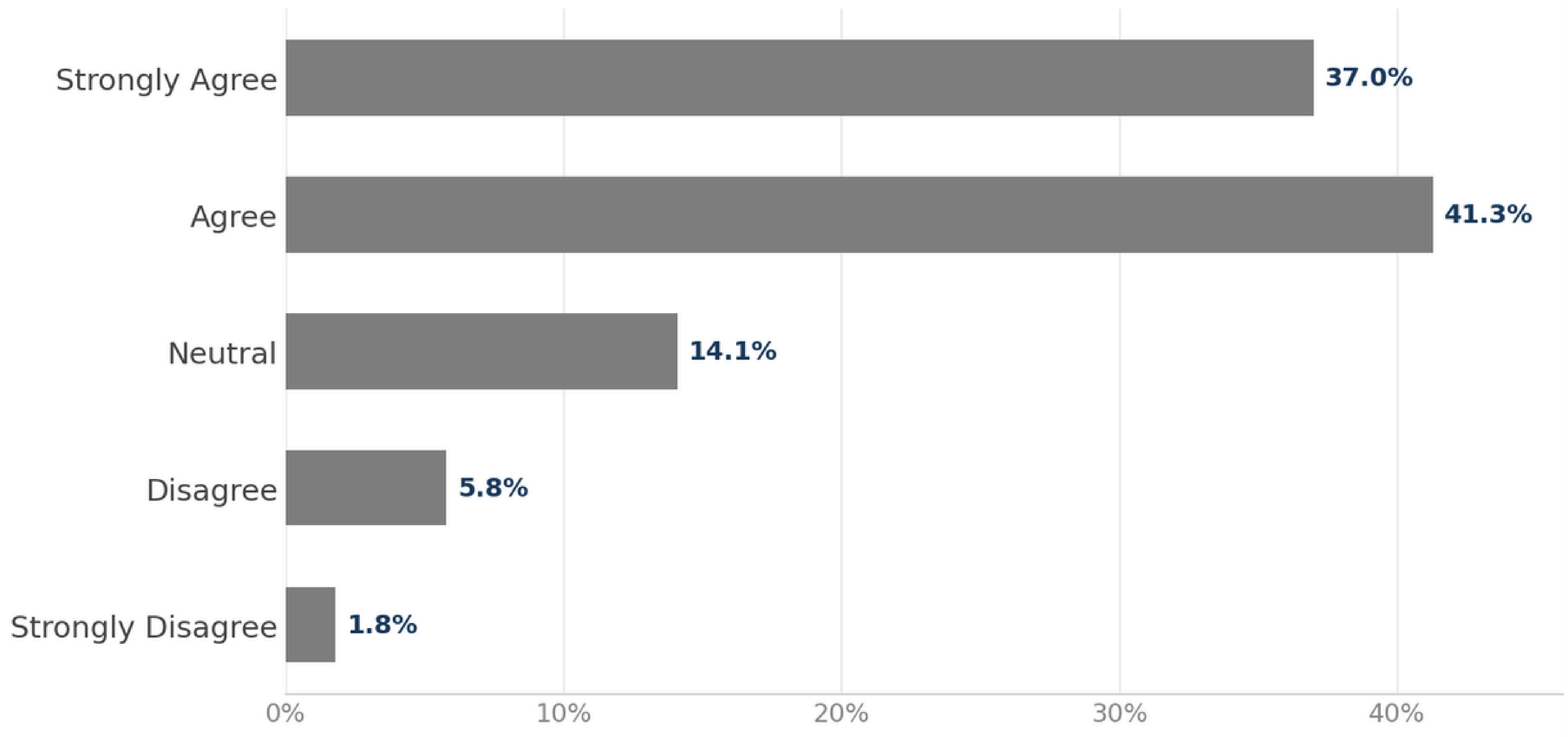
02

Location convenience and amenities also rank high, reinforcing that Branson lodging products that pair good location with consistent execution earn the highest scores.

16

Base: n = 415 respondents who answered (multi-select; bars sum to more than n)

Silver Dollar City is worth the price of admission



KEY TAKEAWAYS

01

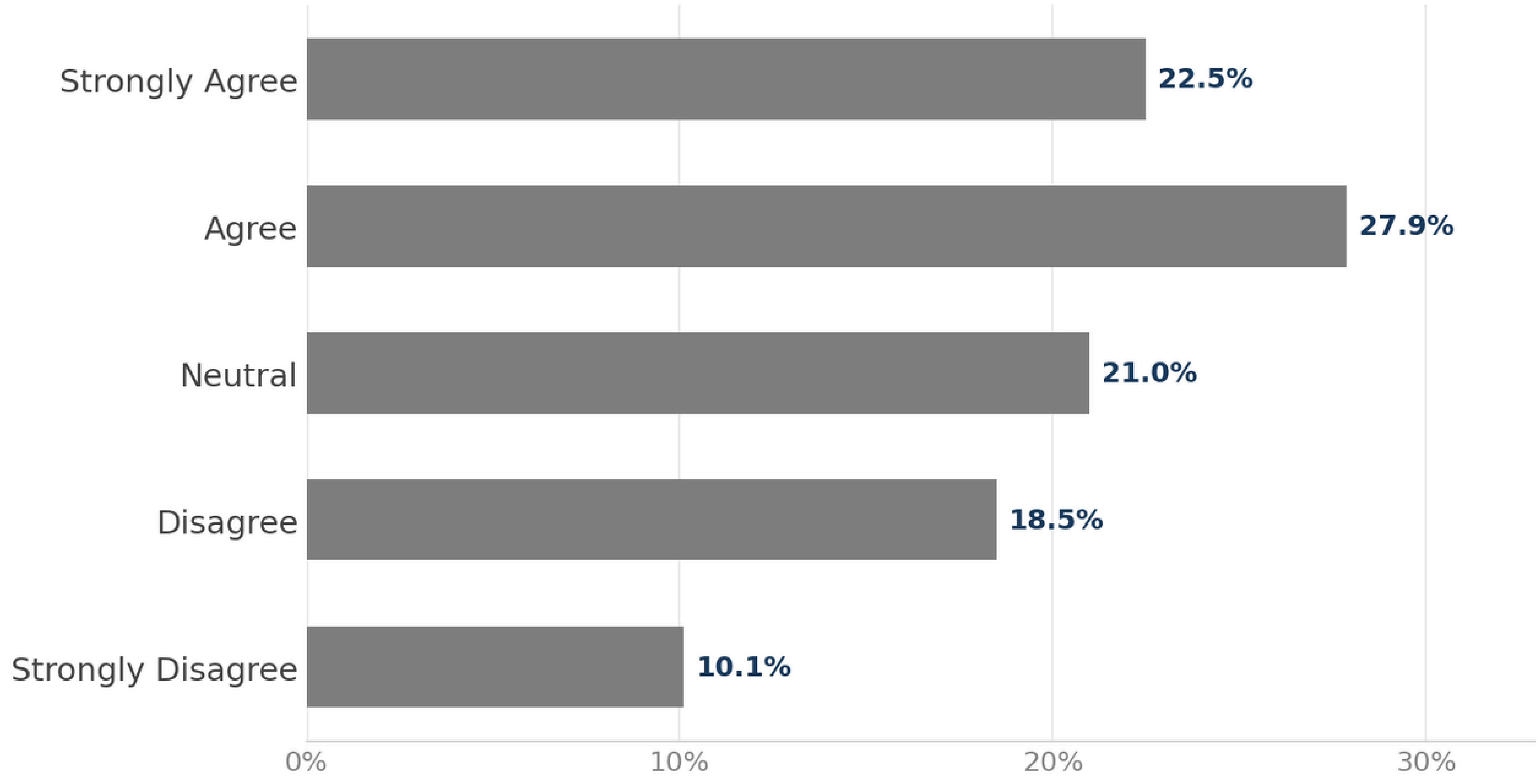
A clear majority agrees that Silver Dollar City is worth the price of admission, but a meaningful disagreement segment exists. The value perception is generally positive but not universal.

02

This aligns with broader pricing conversations in social and review data, suggesting Silver Dollar City sits at a price point where the experience justifies the cost for most, but disclosure of add-on costs upfront would close the gap.

Base: n = 276 respondents

Crowds at Silver Dollar City negatively impact the experience



KEY TAKEAWAYS

01

Crowds at Silver Dollar City are widely seen as having a negative impact on the experience — agreement levels here are notably high.

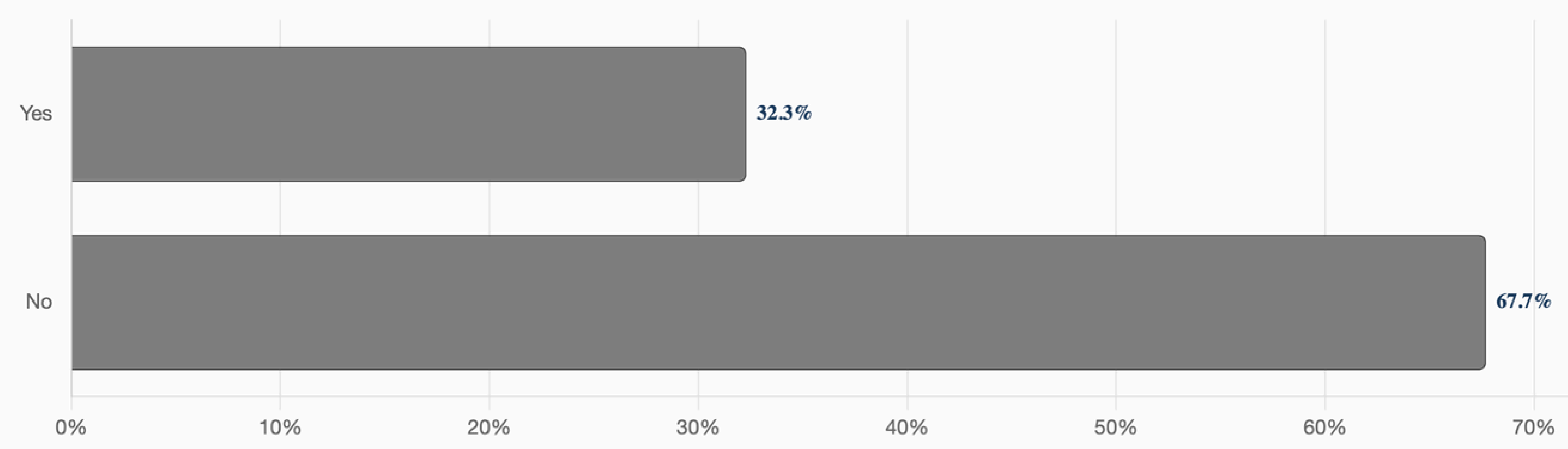
02

This is one of the most actionable findings in the dataset: improved crowd management, scheduling, and queue communication could meaningfully lift overall satisfaction with the park.

18

Base: n = 276 respondents

Have you attended a concert at Thunder Ridge Nature Arena?



KEY TAKEAWAYS

01

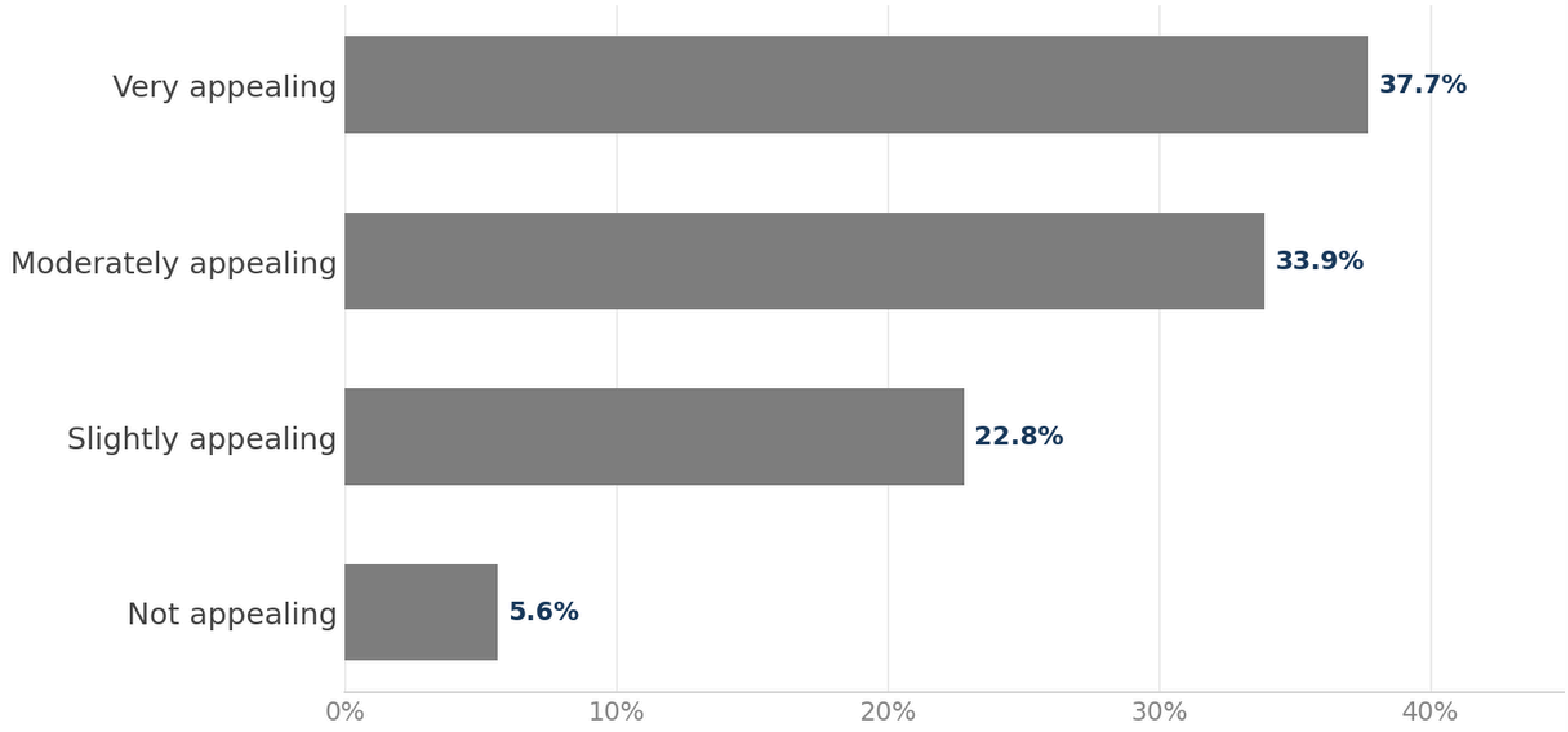
Thunder Ridge concert attendance is still relatively low — the venue is in an early adoption phase rather than a mass-market draw.

02

This represents a clear growth runway: a small base of actual attendees combined with broader-based curiosity creates room for targeted concert-trip campaigns.

Base: n = 499 respondents

Appeal of a Branson trip centered on a Thunder Ridge concert



KEY TAKEAWAYS

01

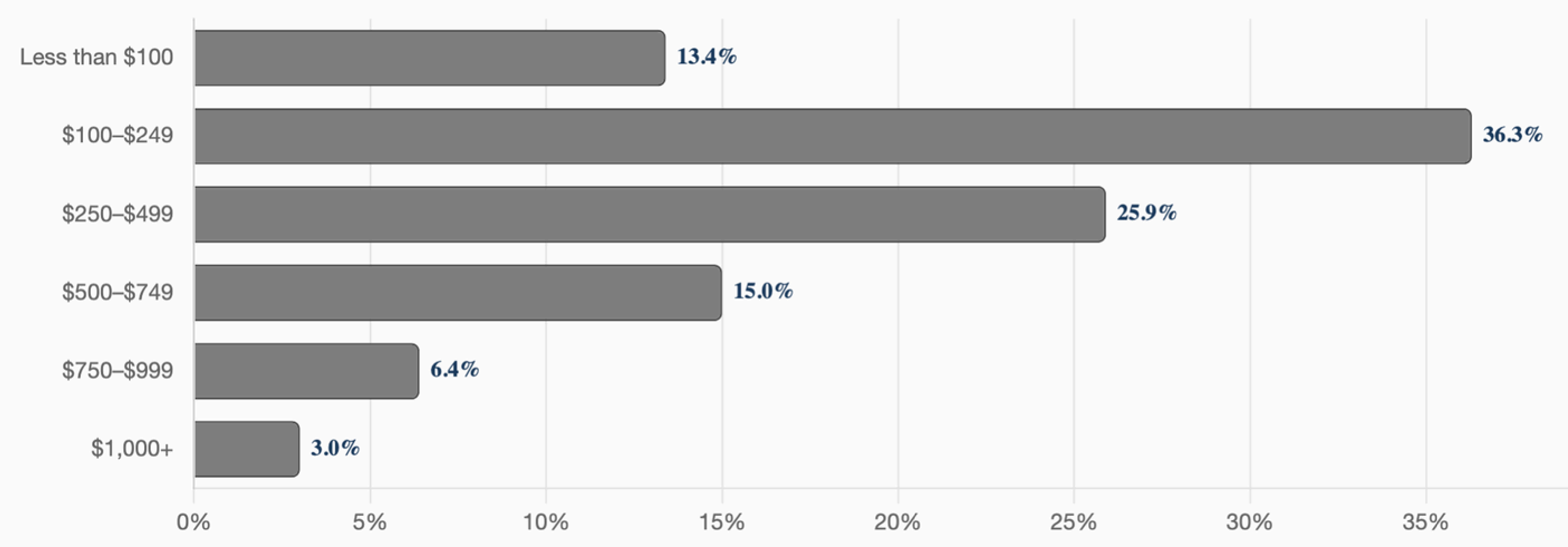
A trip centered around a Thunder Ridge concert is highly appealing to a meaningful share of past visitors, suggesting strong package potential combining tickets, lodging, and shoulder-day attractions.

02

The not-appealing segment likely overlaps with non-concert-goers — confirming this is a segment-specific play rather than a broad-base promotion.

Base: n = 499 respondents

Spending per day (in USD, overall, excluding accommodations)



KEY TAKEAWAYS

01

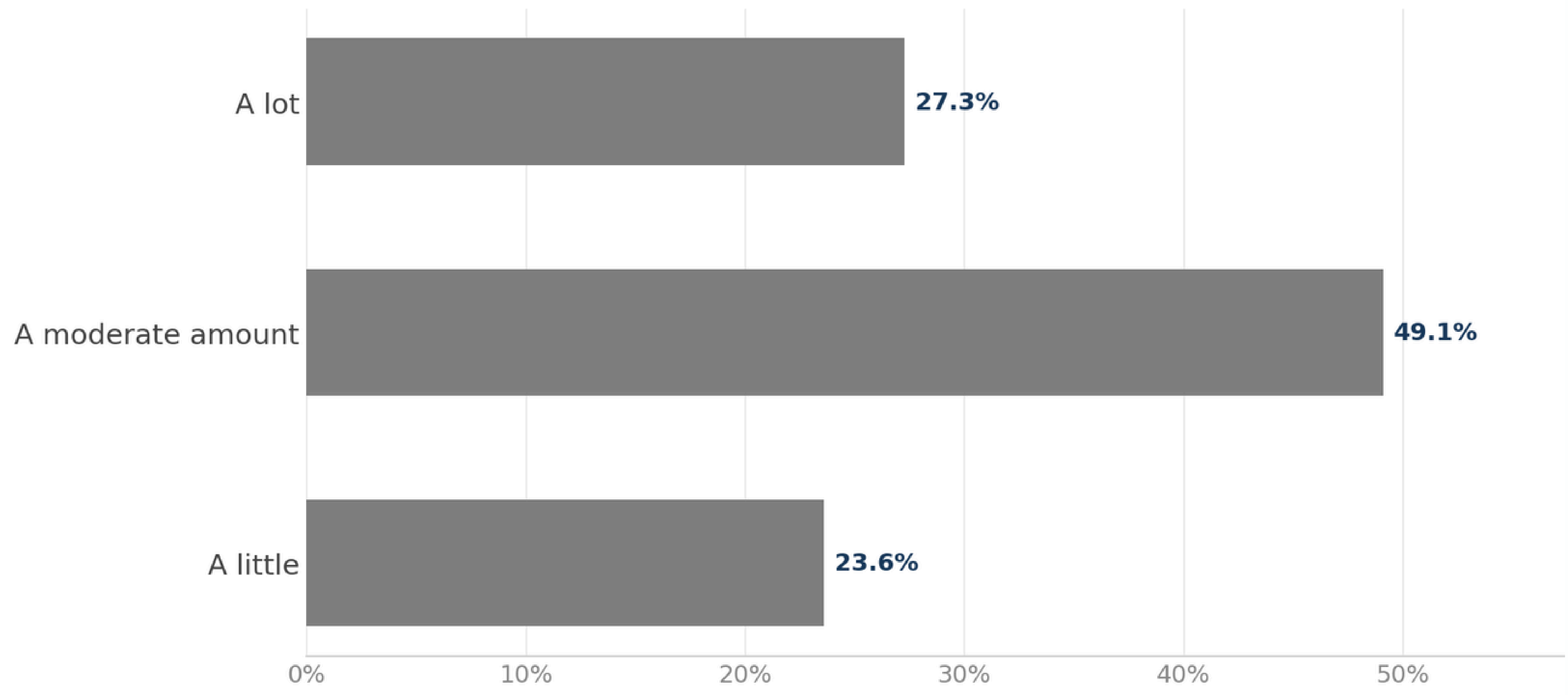
Daily spending clusters in moderate ranges — the typical Branson visitor day-spend reflects the destination's positioning as a mid-tier, family-friendly value play.

02

The higher-spend tail (representing premium-resort and large-group visitors) underscores meaningful upside in capturing more of the affluent multi-generational market.

Base: n = 499 respondents

How much does pricing influence when you choose to visit Branson?



KEY TAKEAWAYS

01

Pricing strongly influences when most visitors choose to come — Branson is a price-sensitive destination, and seasonal pricing strategy has real visitation implications.

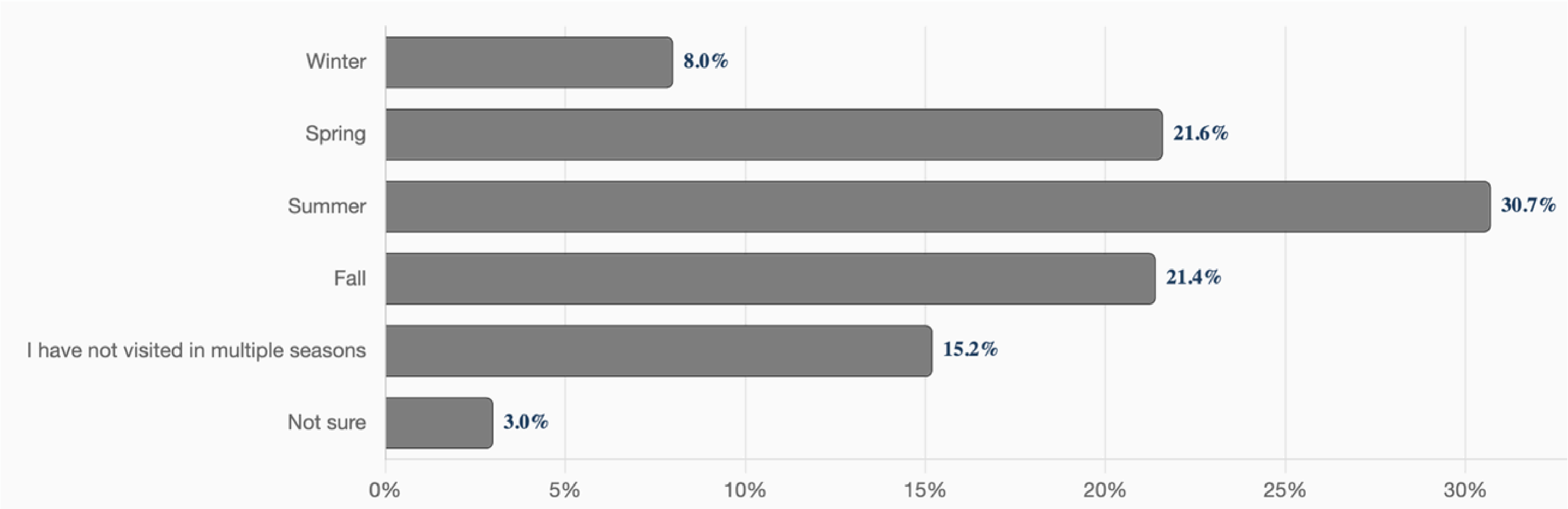
02

Combined with the seasonality data showing November and February dips, this opens a clear opportunity to use targeted pricing to fill shoulder months without devaluing peak.

22

Base: n = 499 respondents

Which seasons do you feel offer the best value in Branson?



KEY TAKEAWAYS

01

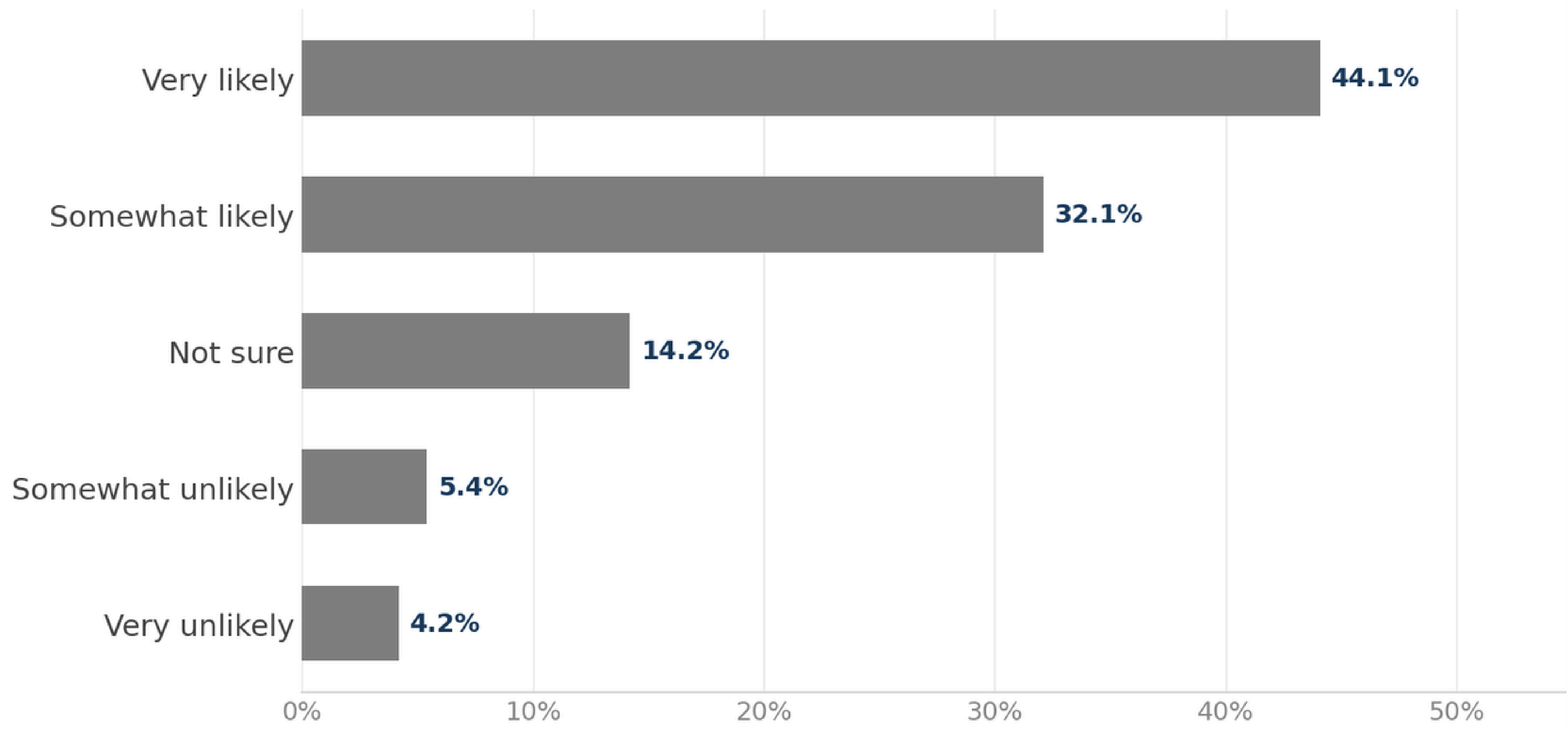
Summer remains the strongest perceived value season in Branson, with 31% of respondents identifying it as offering the best overall experience relative to cost. This reinforces the continued strength of Branson's peak-season family and leisure positioning.

02

Spring and fall also perform strongly, each capturing over 21% of responses, suggesting meaningful opportunity to expand shoulder-season marketing. Visitors increasingly recognize these periods for their combination of lower crowds, seasonal scenery, and stronger perceived affordability.

Base: n = 499 respondents who answered (multi-select; bars sum to more than n)

Likelihood of returning to Branson within the next 3 years



KEY TAKEAWAYS

01

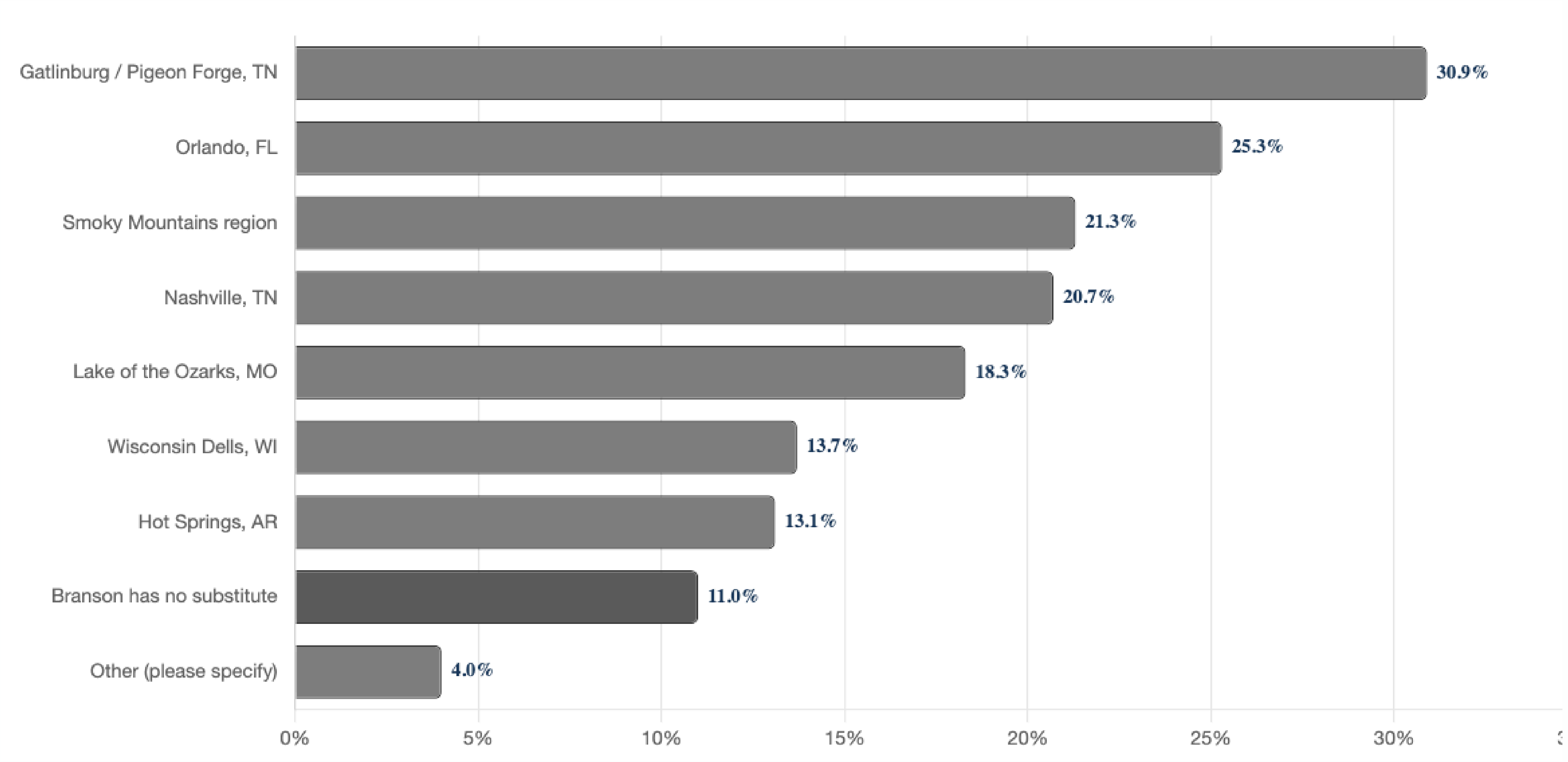
Branson demonstrates exceptionally strong loyalty and repeat visitation potential, with more than 76% of past visitors saying they are somewhat or very likely to return within the next three years. This reinforces the destination's strength as a repeat family and regional leisure market.

02

Negative return intent remains very limited, with fewer than 10% of respondents indicating they are unlikely to revisit. This suggests that overall visitor satisfaction remains strong and that future growth opportunities are more likely tied to attracting new audiences and increasing trip frequency among existing visitors.

Base: n = 499 respondents

What destination would you consider instead of Branson? (Select up to 2)



KEY TAKEAWAYS

01

Branson's competitive set is highly concentrated around regional, drive-market destinations centered on family entertainment, outdoor recreation, and accessible leisure experiences. Gatlinburg/Pigeon Forge (30.9%), Orlando (25.3%), the Smoky Mountains (21.3%), Nashville (20.7%), and Lake of the Ozarks (18.3%) clearly dominate consideration, reinforcing that Branson competes less with aspirational fly-in destinations and more with nearby experiential destinations offering a mix of entertainment, nature, and family-oriented activities.

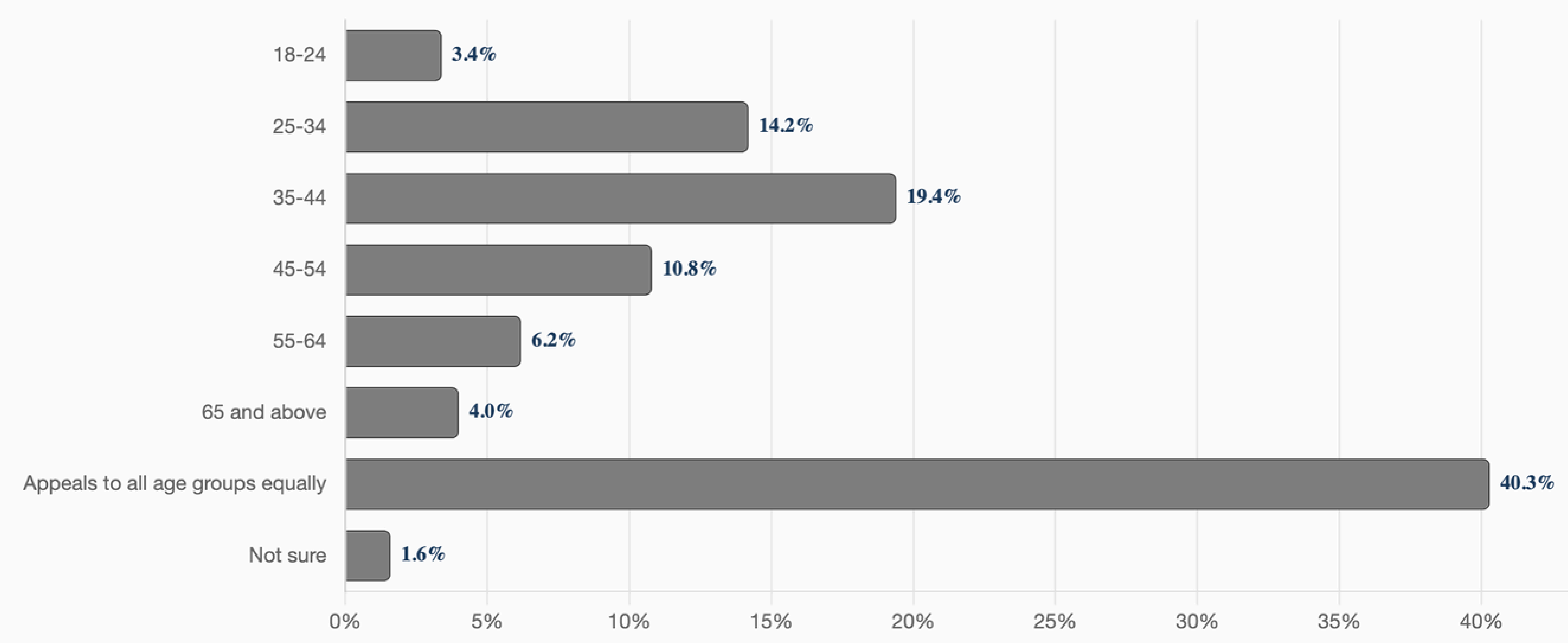
02

The data reveals a strong strategic opportunity for more direct competitive positioning. Since visitors are already actively comparing Branson against destinations like Pigeon Forge, Nashville, and Lake of the Ozarks, marketing should lean into side-by-side differentiation rather than generic destination branding. Messaging can more confidently emphasize Branson's unique combination of live entertainment, family value, outdoor access, and multi-generational appeal within the regional drive market.

Base: n = 498 respondents who answered (multi-select; bars sum to more than n)

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

What age range do you believe Branson is most appealing to?



KEY TAKEAWAYS

01

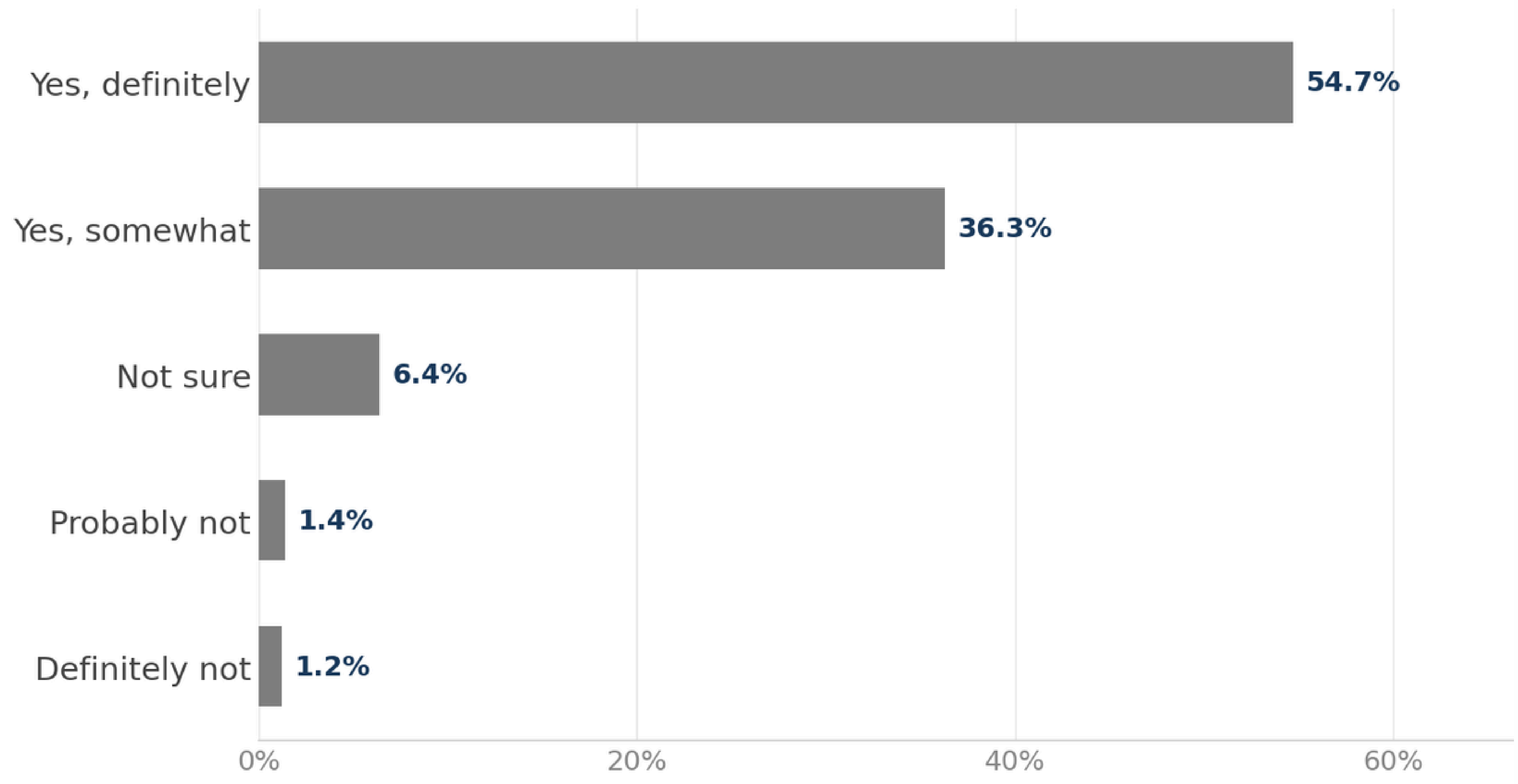
Despite Branson’s long-standing association with older travelers, the strongest perception among visitors is that the destination appeals broadly across generations. In fact, 40.3% of respondents believe Branson appeals equally to all age groups, significantly outperforming any single age segment. This is an important positioning advantage, suggesting that visitors increasingly see Branson as more versatile and multi-generational than its historical stereotype would suggest.

02

Among respondents who selected a specific age group, the strongest perceived fit is concentrated in the 25–44 range, particularly ages 35–44 (19.4%) and 25–34 (14.2%). Perception drops notably among both younger travelers (18–24 at 3.4%) and older audiences (65+ at 4.0%), reinforcing that Branson is currently viewed less as a niche retirement destination and more as a broad family and middle-aged leisure market with cross-generational appeal.

Base: n = 499 respondents

Do you believe Branson offers experiences that appeal to travelers under 50?



KEY TAKEAWAYS

01

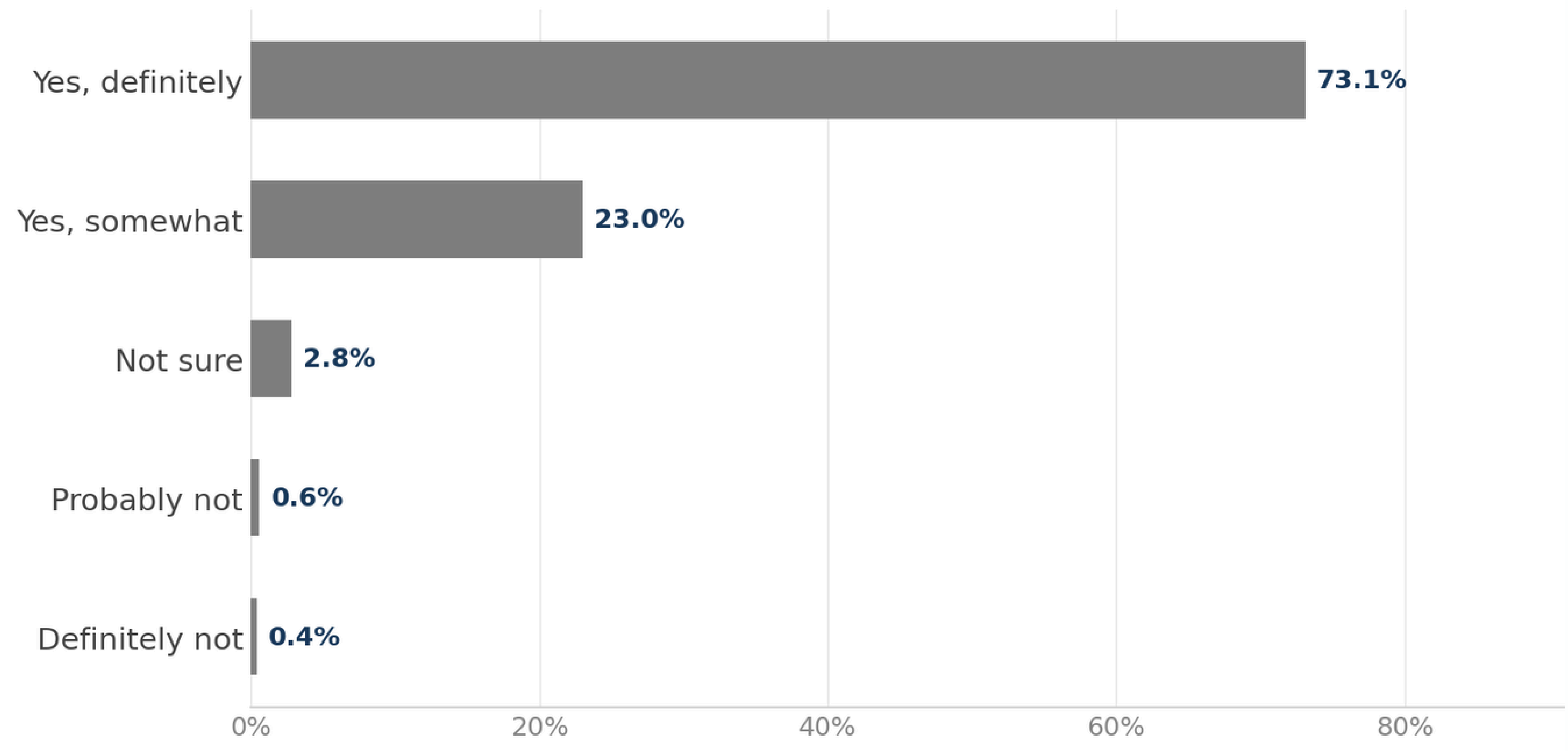
A clear majority of past visitors believe Branson does offer experiences for travelers under 50 — a meaningful counter-narrative to the older-audience perception.

02

The disagreement segment, while smaller, signals where messaging gaps remain — younger travelers need to actively see themselves in Branson content to consider visiting.

Base: n = 499 respondents

Do you consider Branson a family-friendly destination?



KEY TAKEAWAYS

01

An overwhelming majority view Branson as family-friendly — this is a foundational brand strength and a clear competitive position in the regional set.

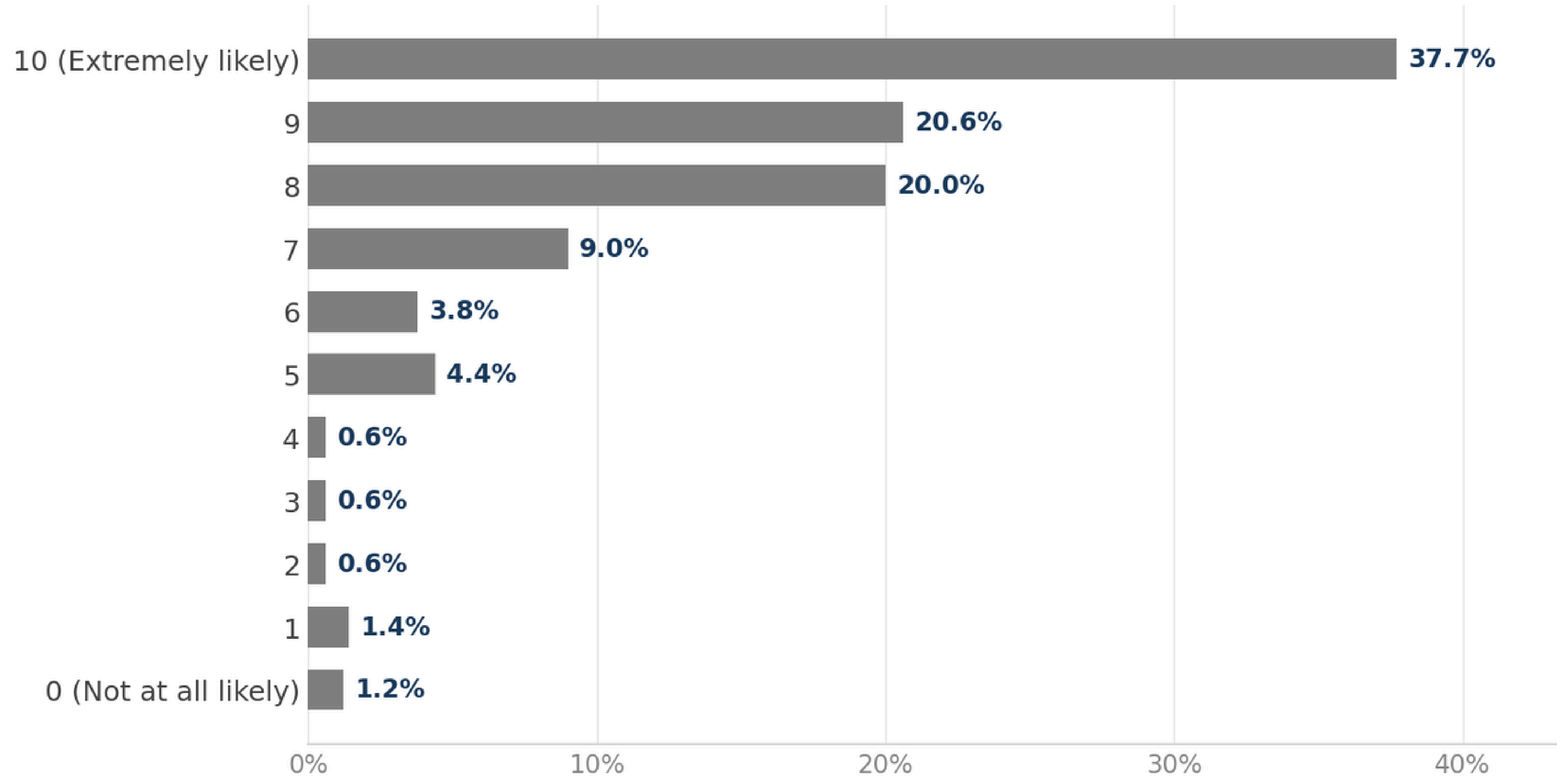
02

Family-friendliness should remain a non-negotiable pillar in destination messaging, especially as the data confirm multi-generational travel is the defining audience profile.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

How likely are you to recommend Branson to others? (0-10 scale)



KEY TAKEAWAYS

01

Branson earns a strongly favorable Net Promoter Score profile — the share of 9–10 promoter scores far exceeds the detractor share.

02

This is consistent with the high re-visit intent and overall satisfaction findings: past visitors are not just satisfied, they are actively willing to recommend.

29

Base: n = 499 respondents

Visitor NPS by age

18-24 (n=18)	25-34 (n=71)	35-44 (n=135)	45-54 (n=82)	55-64 (n=64)	65 and above (n=129)
28	**49**	**55**	**52**	**39**	**36**
50.0% promoters · 27.8% passive · 22.2% detractors	62.0% promoters · 25.4% passive · 12.7% detractors	63.7% promoters · 27.4% passive · 8.9% detractors	63.4% promoters · 25.6% passive · 11.0% detractors	53.1% promoters · 32.8% passive · 14.1% detractors	51.2% promoters · 33.3% passive · 15.5% detractors

KEY TAKEAWAYS

01

Net Promoter Scores are strongest among travelers aged 35–54, indicating Branson performs particularly well with established family and mid-life audiences. These groups show the highest concentration of promoters and the lowest levels of detractors.

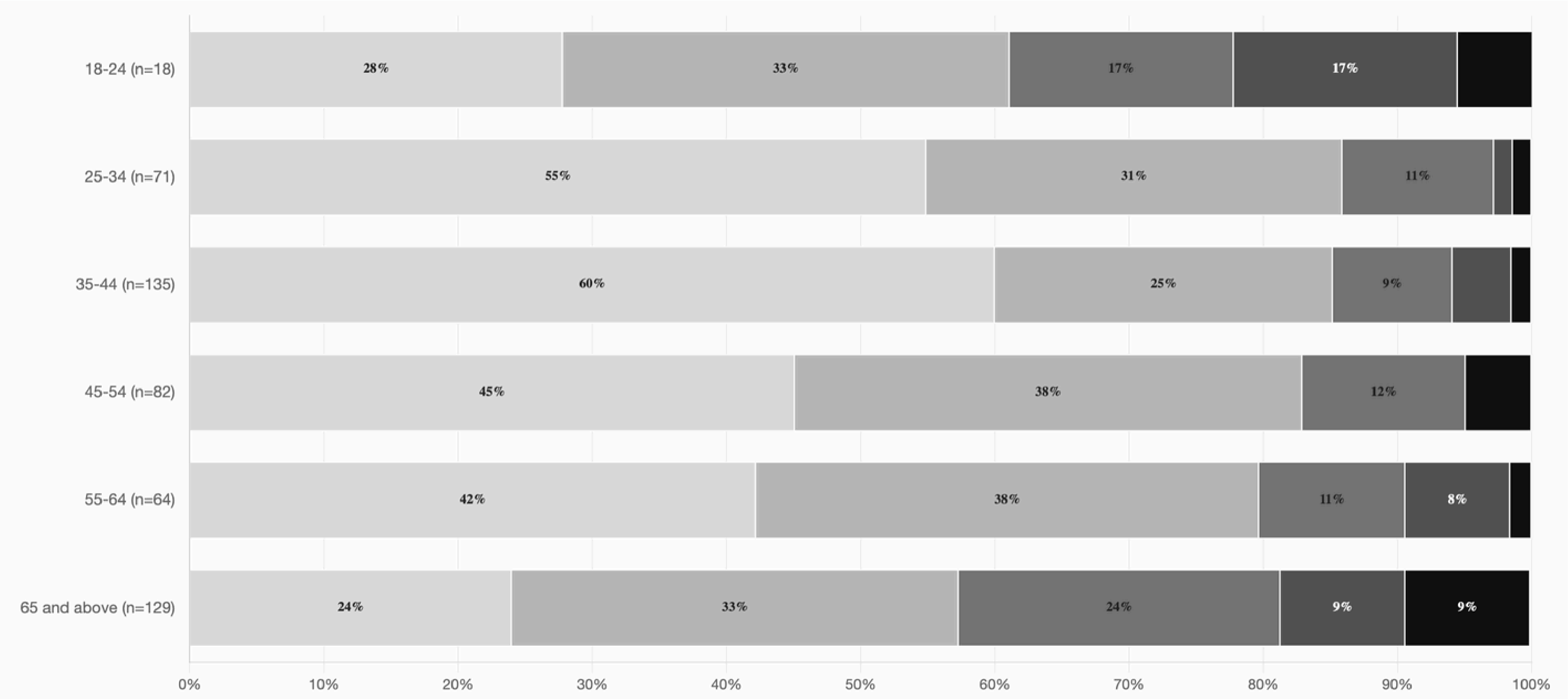
02

Younger travelers (18–24) and older visitors (55+) report comparatively lower NPS scores, driven by higher passive and detractor rates. While overall sentiment remains positive, these segments present opportunities for more targeted experience development and engagement strategies.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

Visitor return intent by age



KEY TAKEAWAYS

01

Return intent remains strong across all age groups, but peaks among travelers aged 35–64, where "very likely to return" responses are highest. This reinforces Branson's strong positioning among established family and mid-life leisure travelers.

02

Younger visitors and travelers aged 65+ show slightly higher levels of uncertainty or hesitation around returning. While overall sentiment remains positive, these segments represent opportunities for more tailored retention strategies and experience diversification.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

Visitor NPS by top sending states

Tennessee (n=119)	Iowa (n=62)	Illinois (n=46)	California (n=44)	Florida (n=28)	Texas (n=29)
48	**19**	**46**	**80**	**46**	**72**
59.7% promoters · 28.6% passive · 11.8% detractors	37.1% promoters · 45.2% passive · 17.7% detractors	56.5% promoters · 32.6% passive · 10.9% detractors	81.8% promoters · 15.9% passive · 2.3% detractors	60.7% promoters · 25.0% passive · 14.3% detractors	75.9% promoters · 20.7% passive · 3.4% detractors

KEY TAKEAWAYS

01

Visitor advocacy varies significantly by market, with long-haul states such as California and Texas reporting exceptionally strong Net Promoter Scores. This suggests visitors traveling greater distances often leave with particularly high satisfaction and recommendation intent.

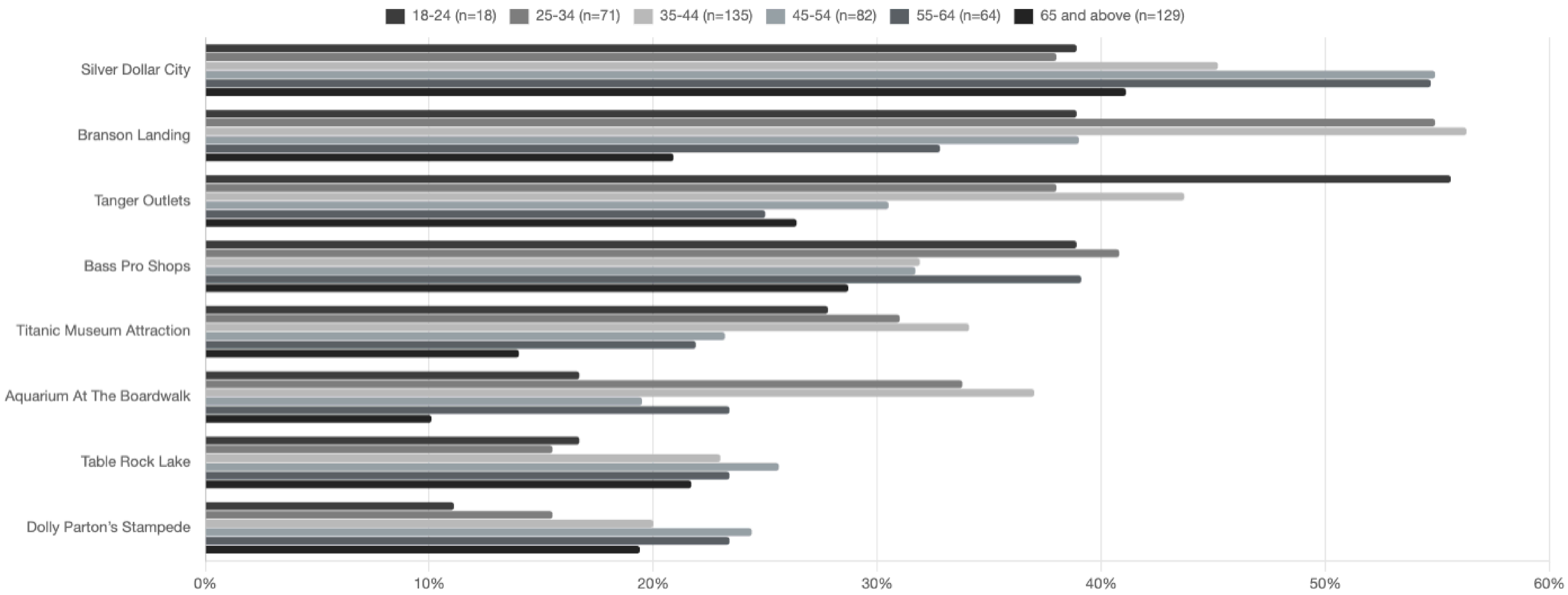
02

Closer regional drive markets, particularly Iowa, report comparatively lower NPS scores and higher passive/detractor rates. This may reflect higher familiarity and expectations among repeat regional travelers, creating an opportunity to refresh experiences and messaging within core feeder markets.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

Top 8 attractions visited by age



KEY TAKEAWAYS

01

Silver Dollar City and Branson Landing emerge as the strongest cross-generational attractions, performing consistently well across nearly all age groups. These flagship experiences play a central role in shaping Branson's broad visitor appeal and repeat visitation strength.

02

Attraction preferences shift meaningfully by age, with younger and middle-age visitors showing stronger engagement with entertainment, shopping, and interactive attractions, while older travelers over-index toward outlet shopping and iconic legacy attractions.

Base: n = 499 respondents

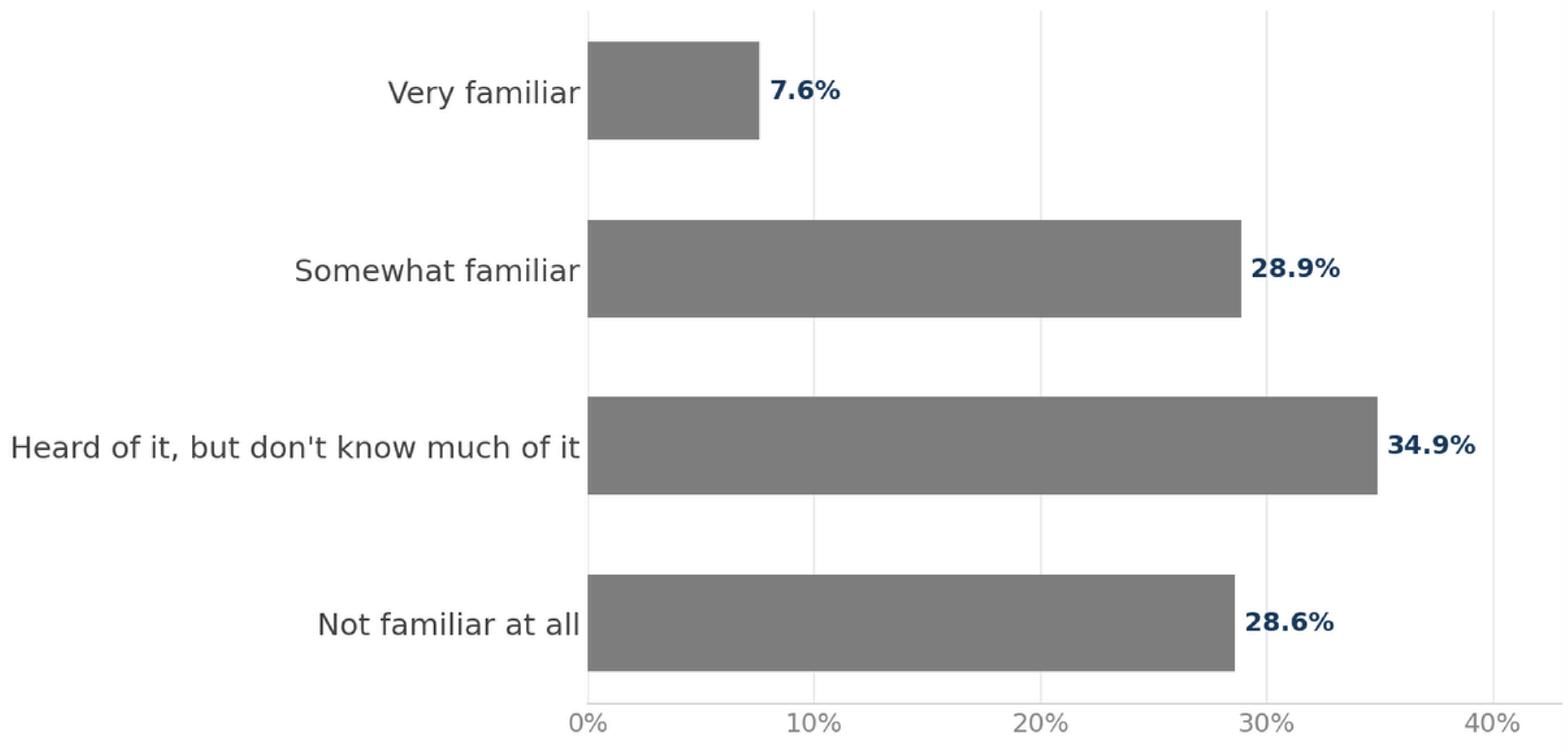
Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

PART 02

Non-Visitor Survey

Questions answered by U.S. leisure travelers who have never visited Branson · n = 301

How familiar are you with Branson, Missouri as a tourist destination?



KEY TAKEAWAYS

01

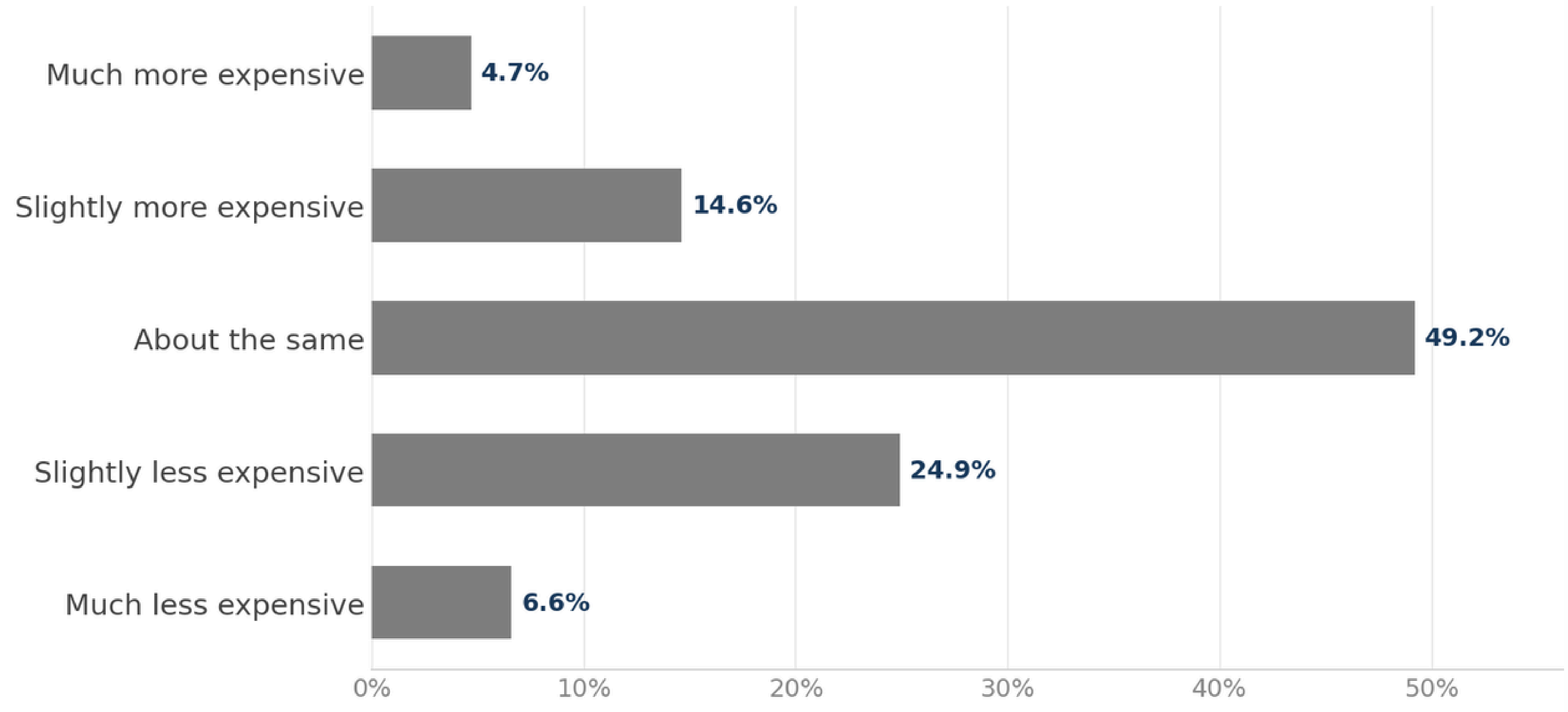
A clear majority of non-visitors are at least somewhat familiar with Branson — awareness exists, even if visitation has not happened yet.

02

The 'not familiar at all' segment, while substantial, represents the upper-funnel opportunity — basic destination awareness investment can move this group toward consideration.

Base: n = 301 respondents

How much do you think a trip to Branson would cost compared to similar destinations?



KEY TAKEAWAYS

01

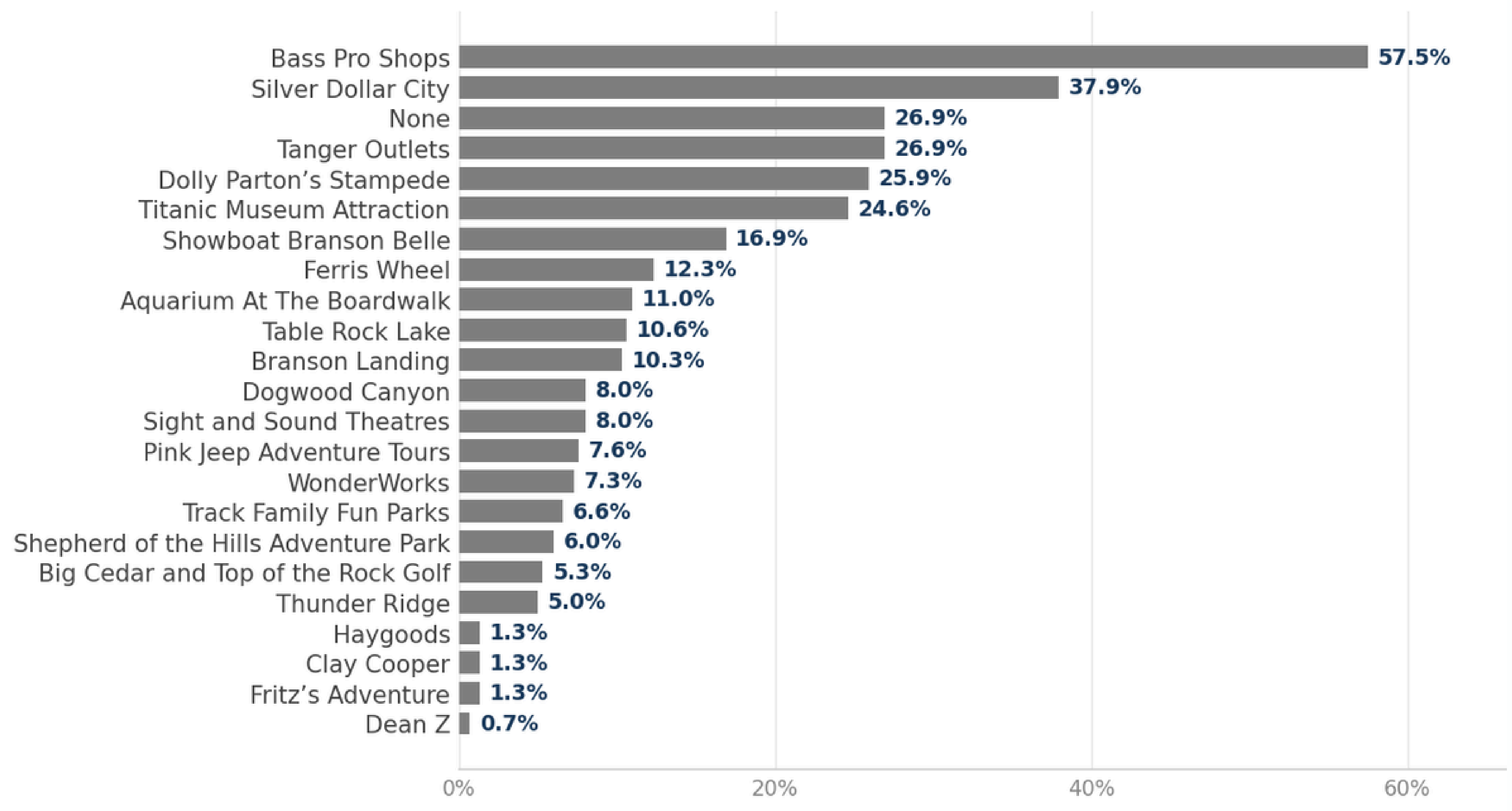
Most non-visitors expect a Branson trip to cost about the same as similar destinations — Branson is not perceived as overpriced relative to its competitive set.

02

A non-trivial share even sees Branson as less expensive than alternatives, supporting value-based messaging especially for budget-conscious family travelers.

Base: n = 301 respondents

Which of the following Branson attractions or experiences have you heard of?



KEY TAKEAWAYS

01

Bass Pro Shops and Silver Dollar City have the strongest unaided awareness among non-visitors. These two anchor brands are doing the heaviest lifting on destination recognition.

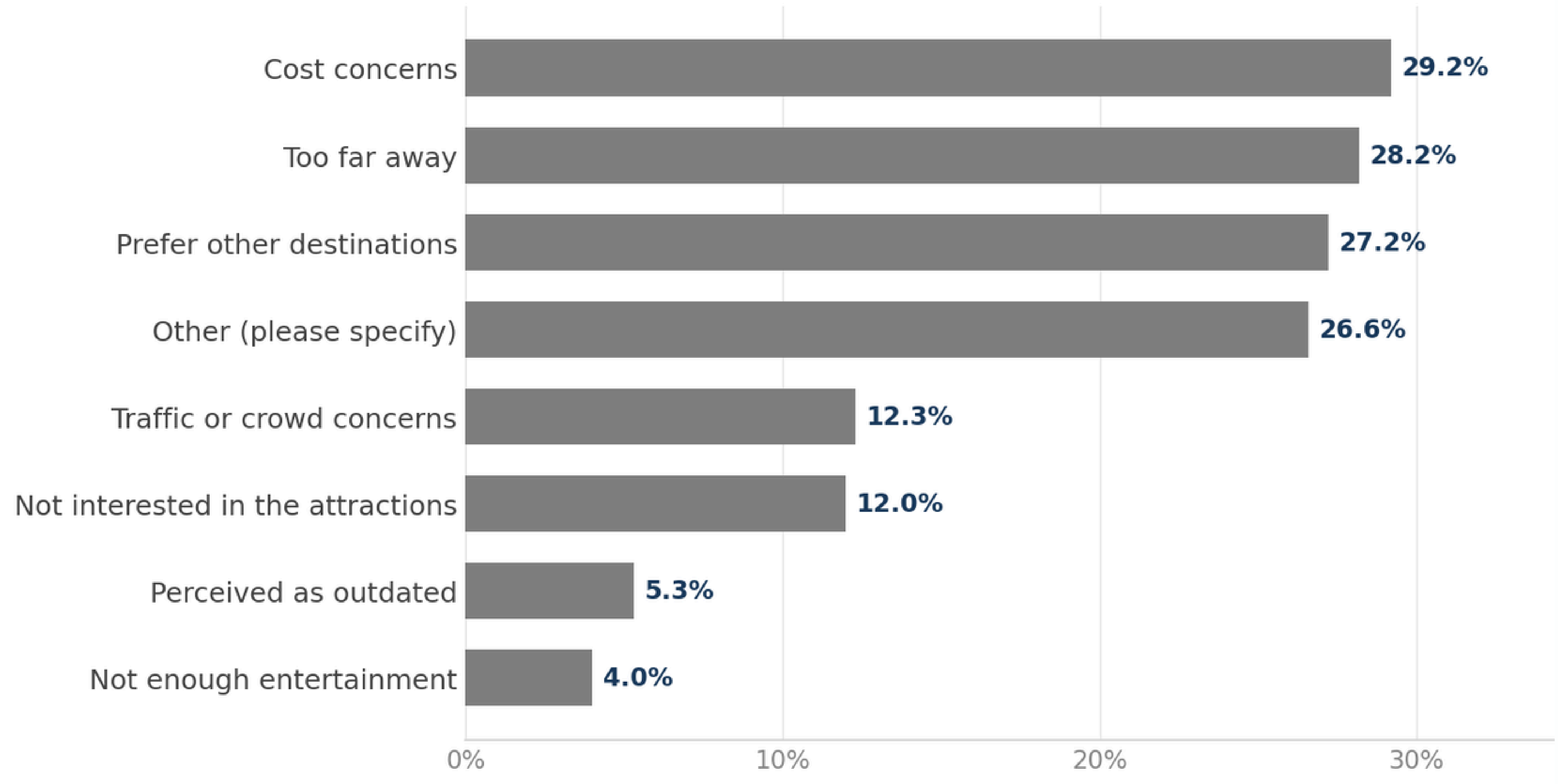
02

Lower awareness for several mid-tier attractions signals that the broader destination portfolio is not breaking through outside of the two flagship names, a portfolio-marketing opportunity.

37

Base: n = 301 respondents who answered (multi-select; bars sum to more than n)

Which of the following best describe why you have not visited Branson?



KEY TAKEAWAYS

01

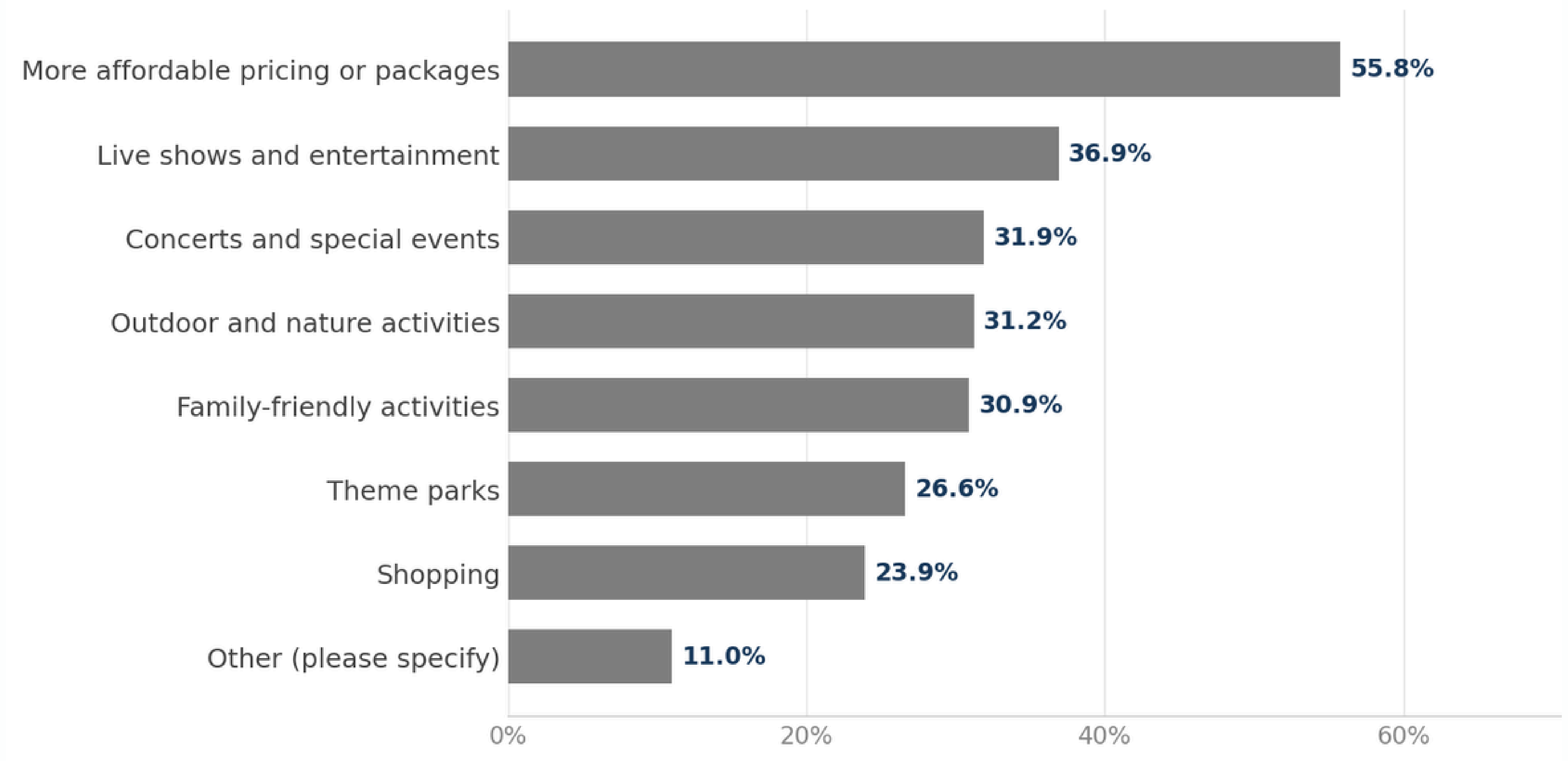
Distance and cost dominate non-visitor barriers — these are the two largest reasons people have not yet visited Branson.

02

'Not interested' and 'never thought of it' together also represent a meaningful barrier — confirming the audience-fit and consideration challenges seen in the social sentiment data.

Base: n = 301 respondents who answered (multi-select; bars sum to more than n)

Which of the following would make you more likely to consider visiting Branson?



KEY TAKEAWAYS

01

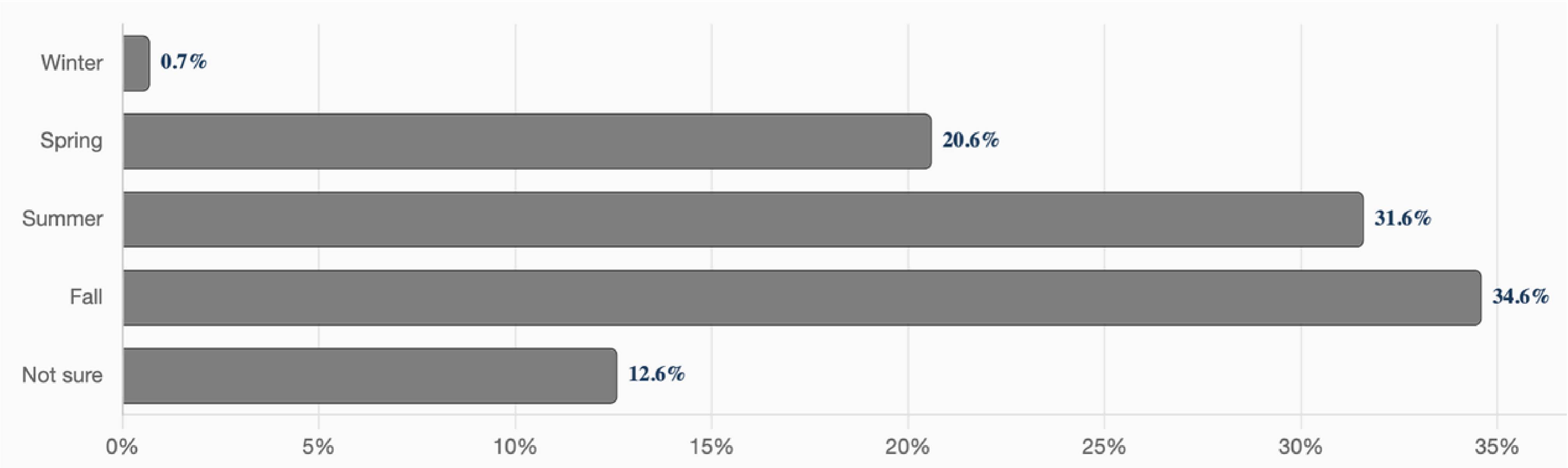
Better deals/promotions and an authentic local experience are the top motivators that would push non-visitors toward consideration.

02

Major events and concerts also rank highly — reinforcing the strategic value of Thunder Ridge and event-led marketing in pulling new audiences into Branson.

Base: n = 301 respondents who answered (multi-select; bars sum to more than n)

Which seasons would you consider most likely for a visit to Branson?



KEY TAKEAWAYS

01

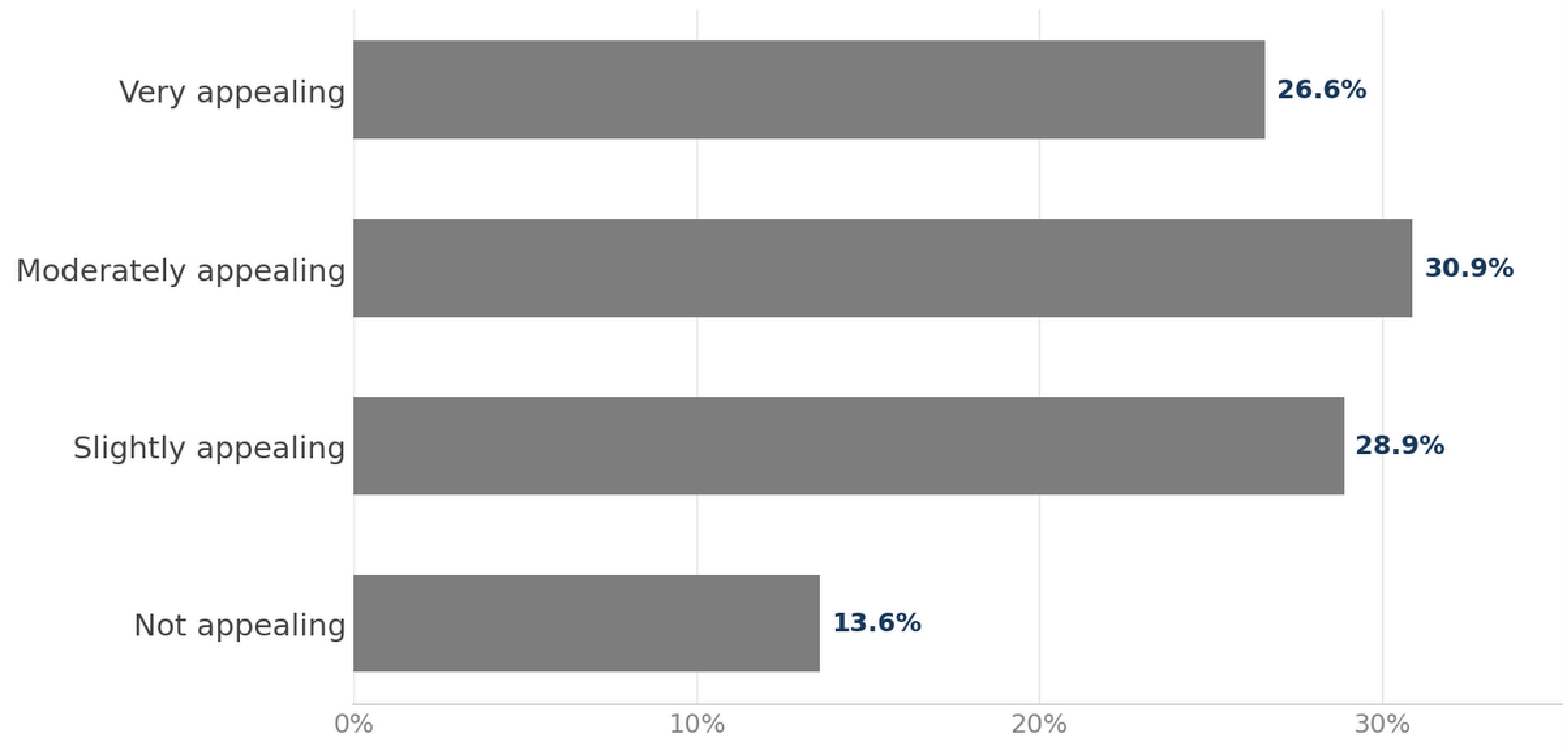
Branson's strongest seasonal appeal among non-visitors is concentrated in Fall (34.6%) and Summer (31.6%), positioning the destination primarily as a warm-weather and shoulder-season leisure destination rather than a year-round getaway. The extremely low Winter interest (0.7%) highlights a major perception gap around off-season visitation and suggests that many non-visitors currently do not associate Branson with winter experiences or seasonal programming.

02

Fall emerges as a particularly important strategic opportunity, outperforming even Summer among non-visitors. This indicates strong potential to position Branson around scenic, outdoor, and experiential seasonal travel themes tied to foliage, festivals, entertainment, and comfortable weather. At the same time, the weaker Spring and Winter performance suggests opportunities for more targeted seasonal storytelling and product packaging to better distribute demand throughout the year.

Base: n = 301 respondents who answered (multi-select; bars sum to more than n)

How appealing would Branson be as a destination that offers major concerts and live events?



KEY TAKEAWAYS

01

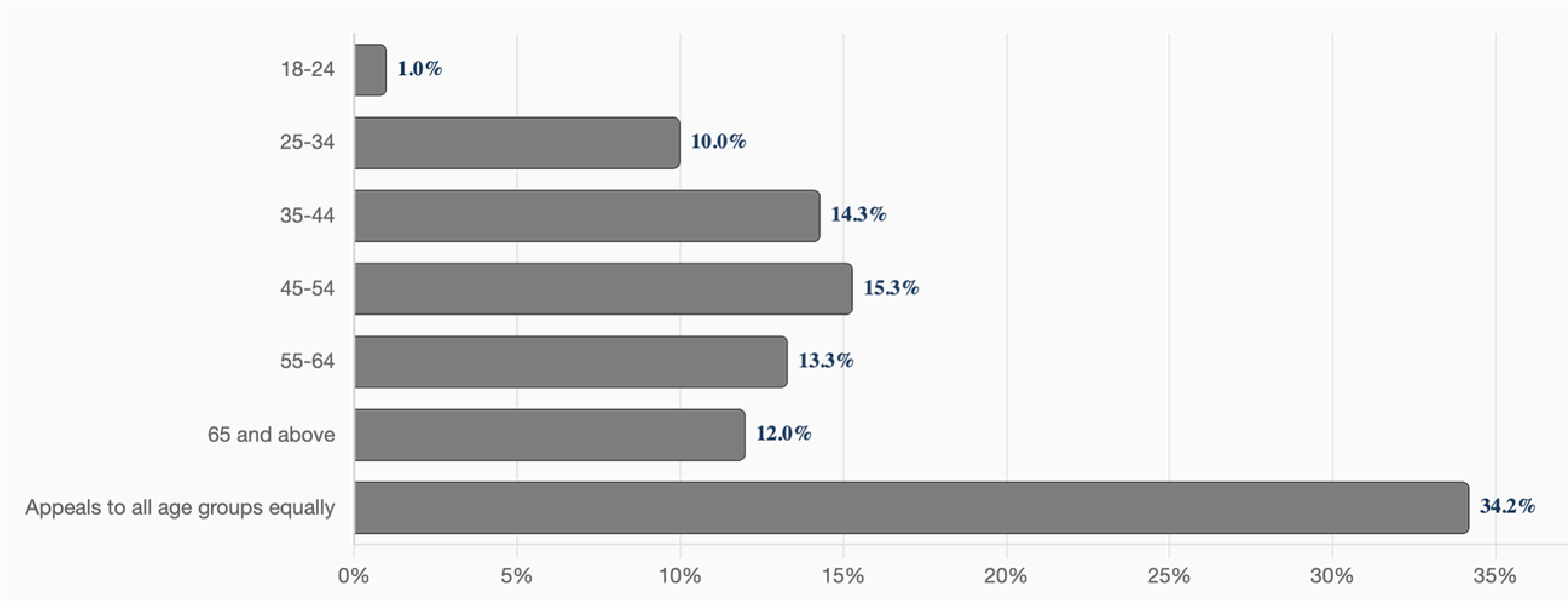
Branson as a major-concert-and-events destination is appealing to a strong majority of non-visitors — the events angle has genuine pull-through with audiences who haven't visited yet.

02

This validates Thunder Ridge and broader live-event programming as a high-leverage tool for breaking through to new visitor segments.

Base: n = 301 respondents

What age range would you think Branson is more appealing to?



Base: n = 301 respondents

KEY TAKEAWAYS

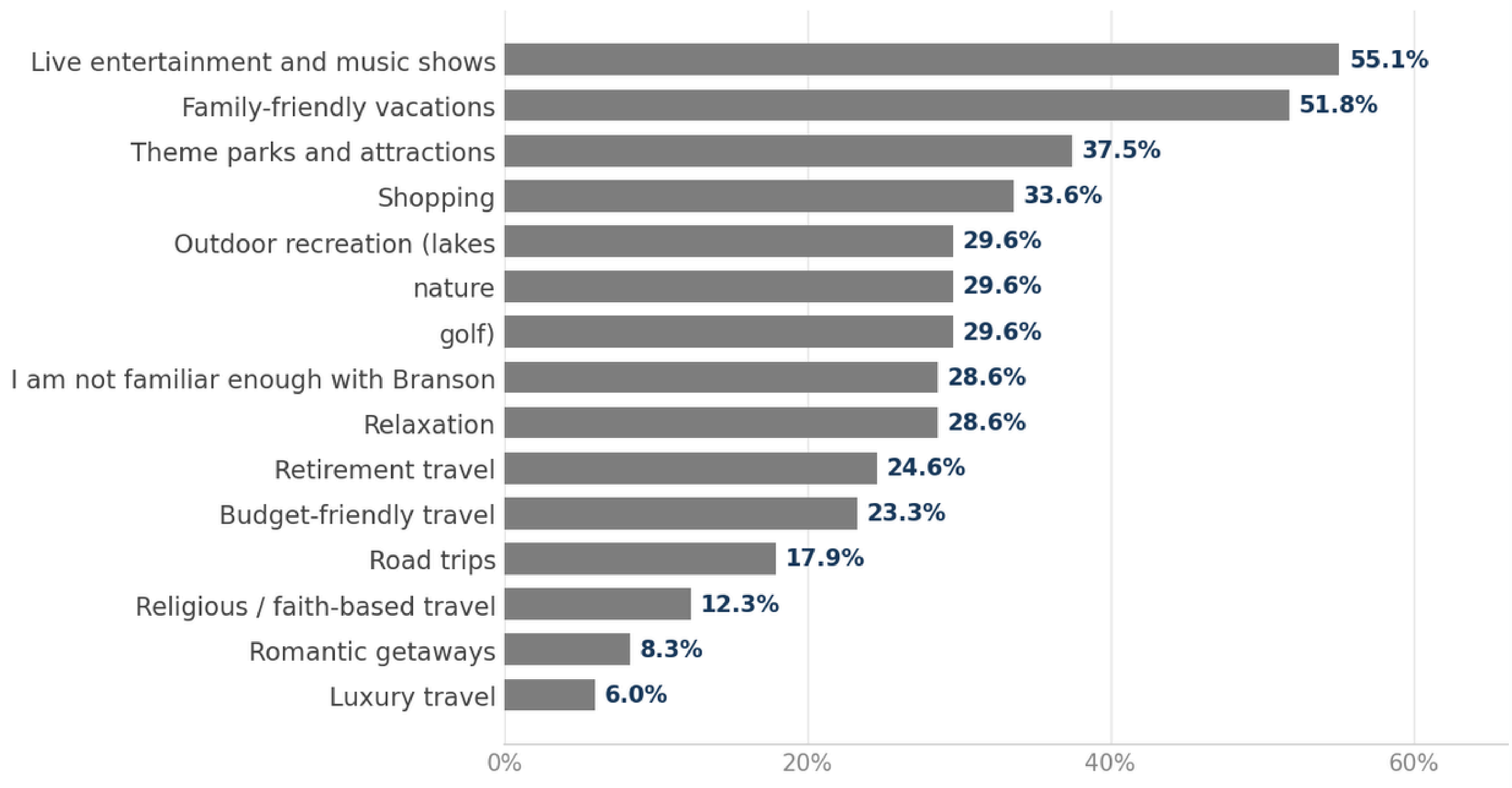
01

Non-visitors still associate Branson more strongly with middle-aged and older audiences than with younger travelers. Perceptions peak among ages 45–54 (15.3%), 35–44 (14.3%), 55–64 (13.3%), and 65+ (12.0%), while appeal among younger audiences remains significantly lower, particularly for ages 18–24 (1.0%). This suggests that, despite Branson's evolving product mix, the destination continues to carry a mature-audience perception among people who have never visited.

02

At the same time, the largest single response remains that Branson "appeals to all age groups equally" (34.2%), indicating that broad appeal messaging is beginning to resonate even among non-visitors. However, the gap between this perception and the weak scores among younger demographics highlights a continued branding challenge: Branson is increasingly viewed as multi-generational, but not yet strongly associated with youth-oriented travel.

What types of experiences do you associate with Branson?



KEY TAKEAWAYS

01

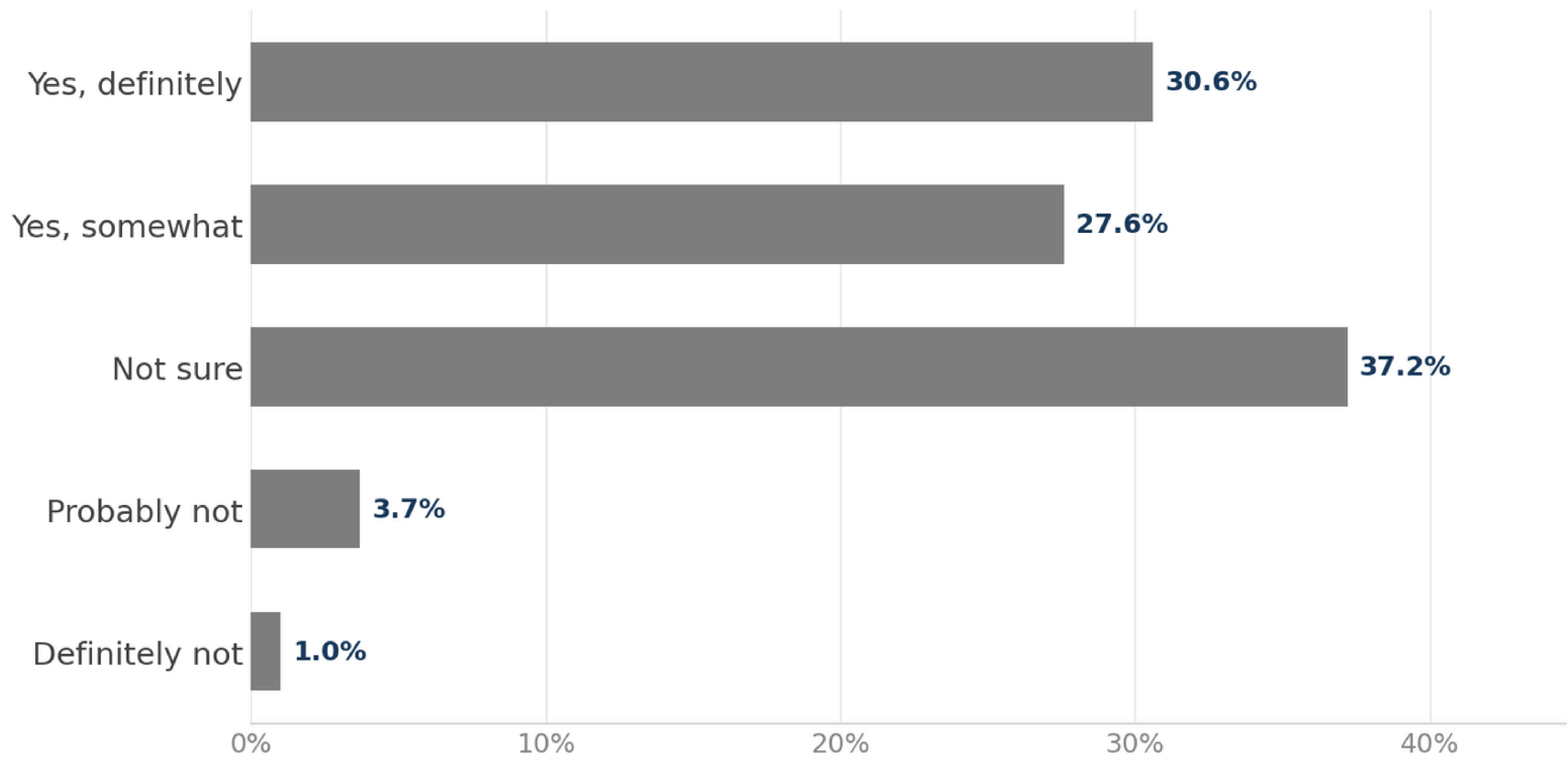
Non-visitors most strongly associate Branson with shows, family entertainment, and outdoor experiences. The core brand pillars are landing accurately.

02

Less-strong associations with food, shopping, and nightlife signal portfolio-breadth opportunities to expand the perception of what Branson offers beyond its strongest existing pillars.

Base: n = 301 respondents who answered (multi-select; bars sum to more than n)

Do you believe Branson offers experiences that appeal to travelers under 50?



KEY TAKEAWAYS

01

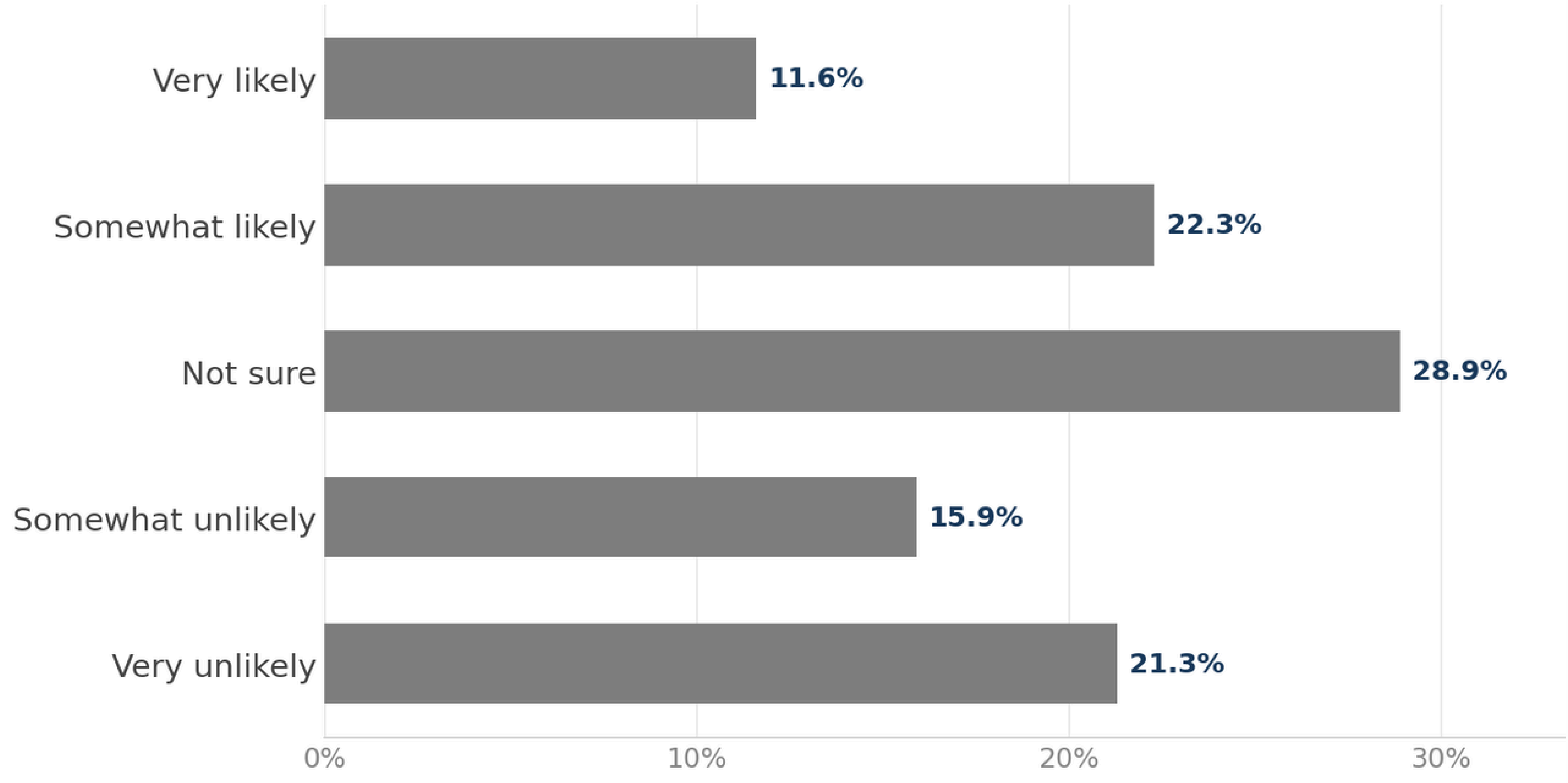
Non-visitors are split on whether Branson appeals to under-50 travelers — this is one of the clearest perception gaps in the entire dataset.

02

Closing this gap requires content that explicitly puts younger audiences front and center — both visually and editorially — across paid and organic channels.

Base: n = 301 respondents

How likely are you to visit Branson in the next two years?



KEY TAKEAWAYS

01

Future-visit likelihood among non-visitors clusters in the 'somewhat likely' range — there is genuine consideration interest, but it has not yet converted into firm planning.

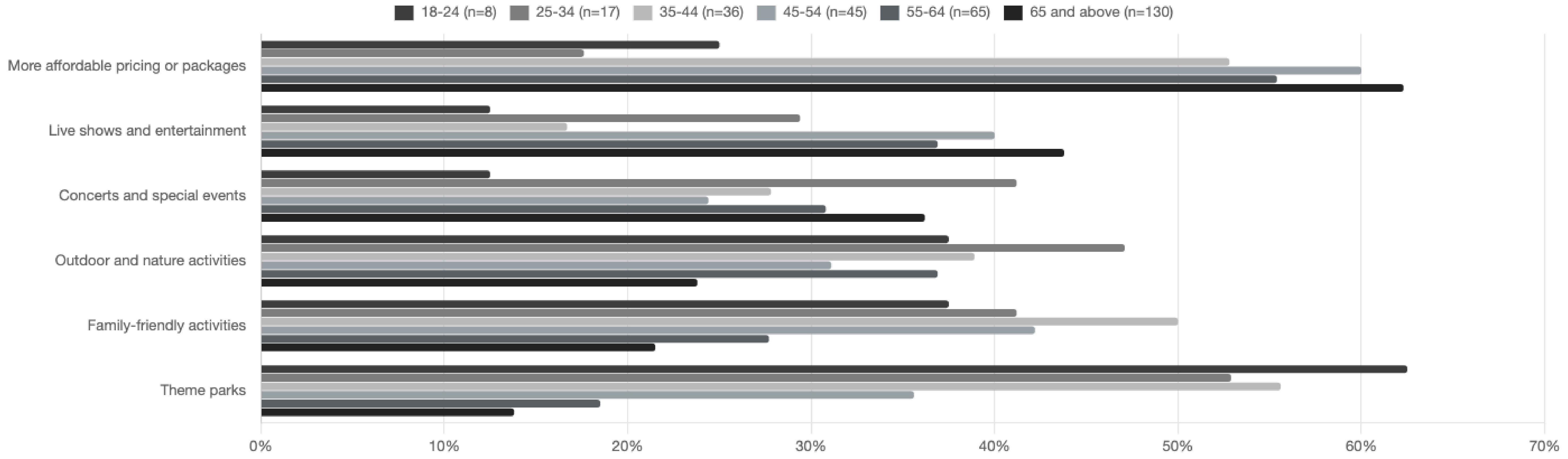
02

Targeted outreach to the 'very likely' segment with concrete trip-builder content (lodging + tickets + dates) is the highest-conversion campaign opportunity in this audience.

Base: n = 301 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Non-Visitor sample (n=301)

Conversion drivers by age for non-visitors



KEY TAKEAWAYS

01

Affordable pricing and theme parks are the strongest conversion drivers across nearly all age groups, reinforcing the importance of value-oriented family entertainment in motivating future visitation to Branson.

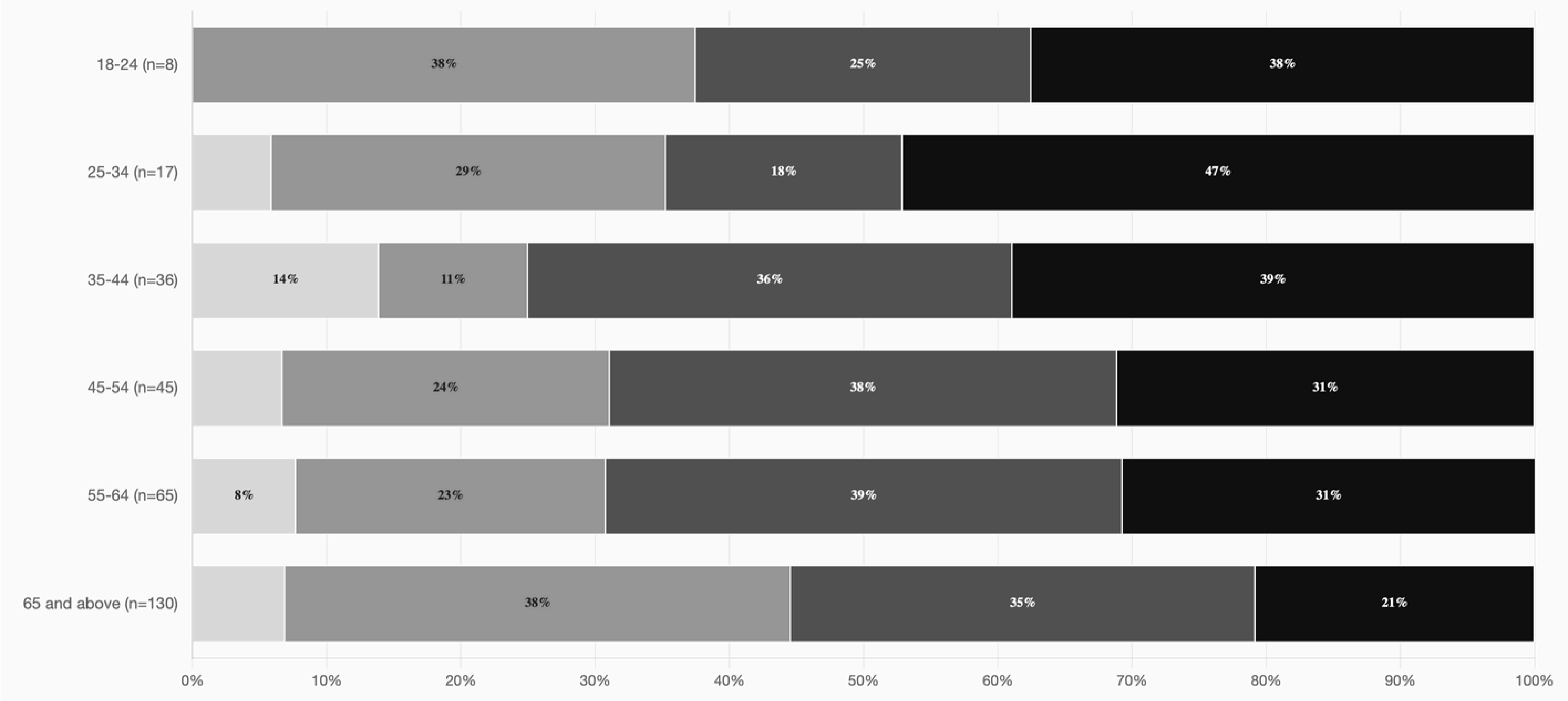
02

Motivations vary meaningfully by generation, with younger and middle-age travelers responding more strongly to concerts, events, and outdoor activities, while older audiences over-index toward live entertainment and traditional family-oriented experiences.

Base: n = 301 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Non-Visitor sample (n=301)

Branson familiarity by age for non-visitors



KEY TAKEAWAYS

01

Branson familiarity generally increases with age, with travelers aged 55+ significantly more likely to describe themselves as somewhat or very familiar with the destination. This suggests Branson currently maintains stronger awareness among older audiences.

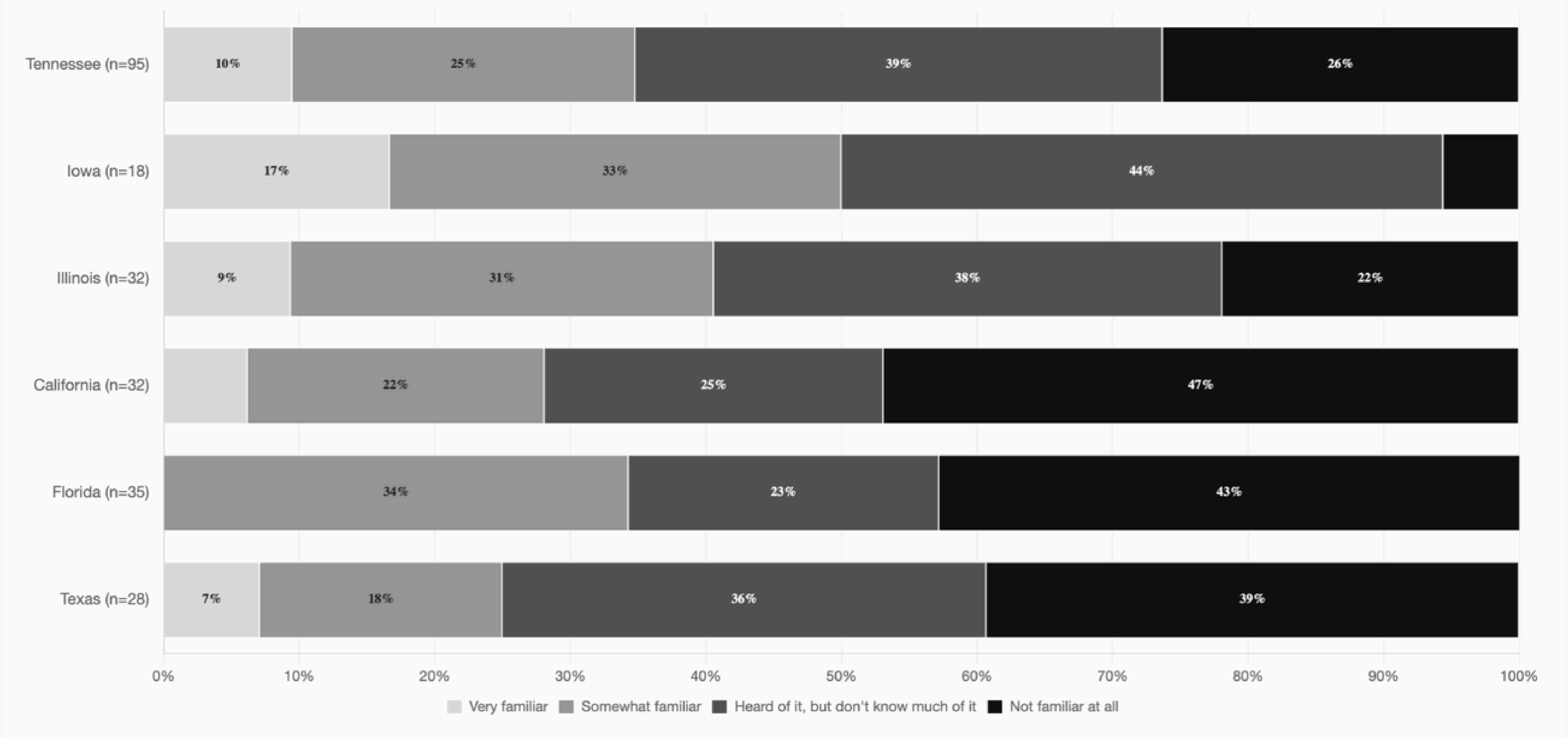
02

Younger and middle-age non-visitors are more likely to say they have heard of Branson but know little about it, indicating an awareness-to-consideration gap rather than a complete lack of recognition. This creates an opportunity for educational and experience-led marketing campaigns.

Base: n = 301 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Non-Visitor sample (n=301)

Branson familiarity by top sending states for non-visitors



KEY TAKEAWAYS

01

Branson familiarity varies significantly by market, with regional states such as Tennessee and Texas reporting the strongest overall awareness and familiarity levels. This reinforces the importance of regional drive-market proximity in shaping destination recognition.

02

Longer-haul markets such as California and Florida show substantially higher levels of low familiarity or limited knowledge about Branson. This suggests awareness exists nationally, but deeper understanding of the destination weakens outside core regional feeder markets.

Base: n = 301 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Non-Visitor sample (n=301)

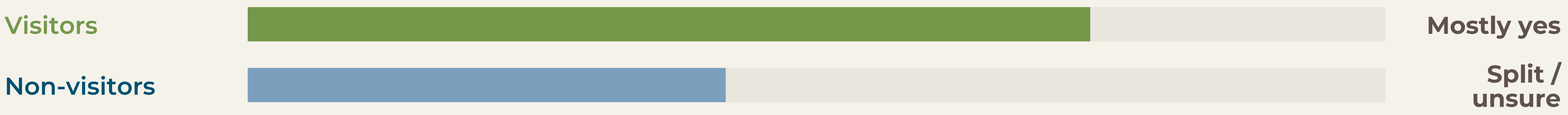
PART 03

Visitor vs Non-Visitor — Direct Comparisons

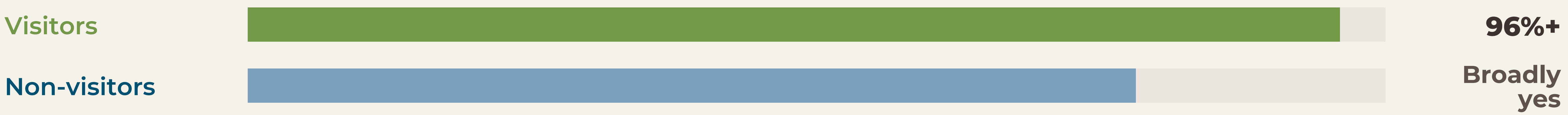
Same (or comparable) questions asked of both audiences, including demographics and intent.

Key cross-analysis

DOES BRANSON APPEAL TO TRAVELERS UNDER 50?

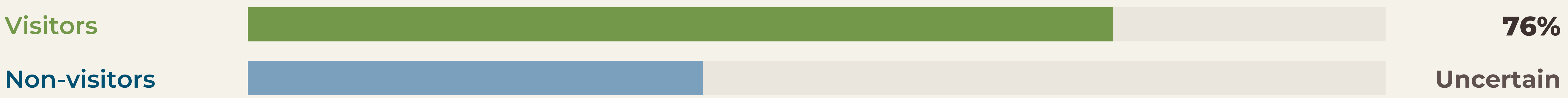


IS BRANSON FAMILY-FRIENDLY?

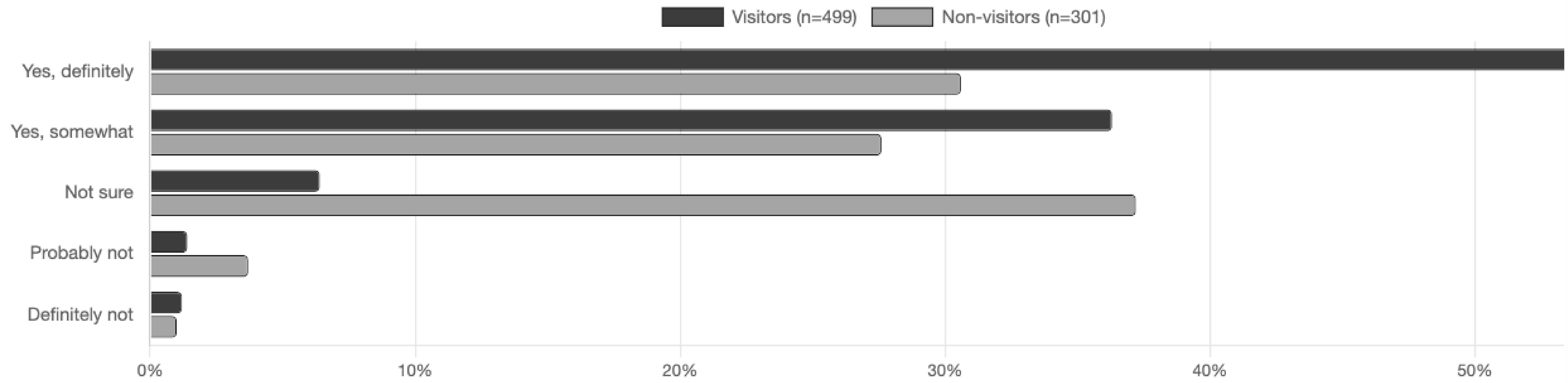


Among non-visitors, 13.9% of women say "not familiar enough to say" vs only 5.6% of men — brand-familiarity messaging may convert more women.

RETURN INTENT (VISITORS) VS VISIT INTENT (NON-VISITORS)



Does Branson appeal to travelers under 50?



KEY TAKEAWAYS

01

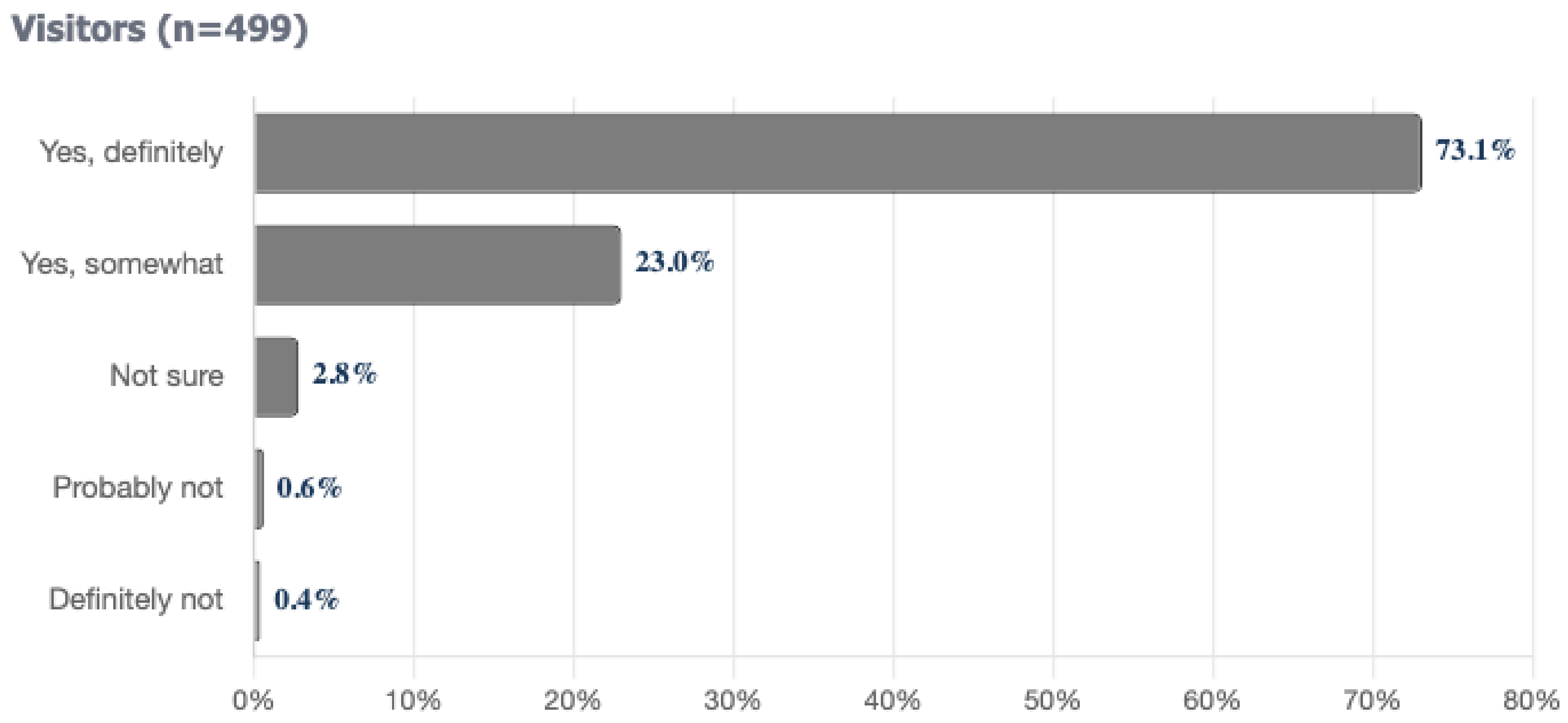
Visitors are significantly more likely than non-visitors to believe Branson appeals to travelers under 50, suggesting that firsthand experience meaningfully improves perceptions of the destination's relevance to younger audiences.

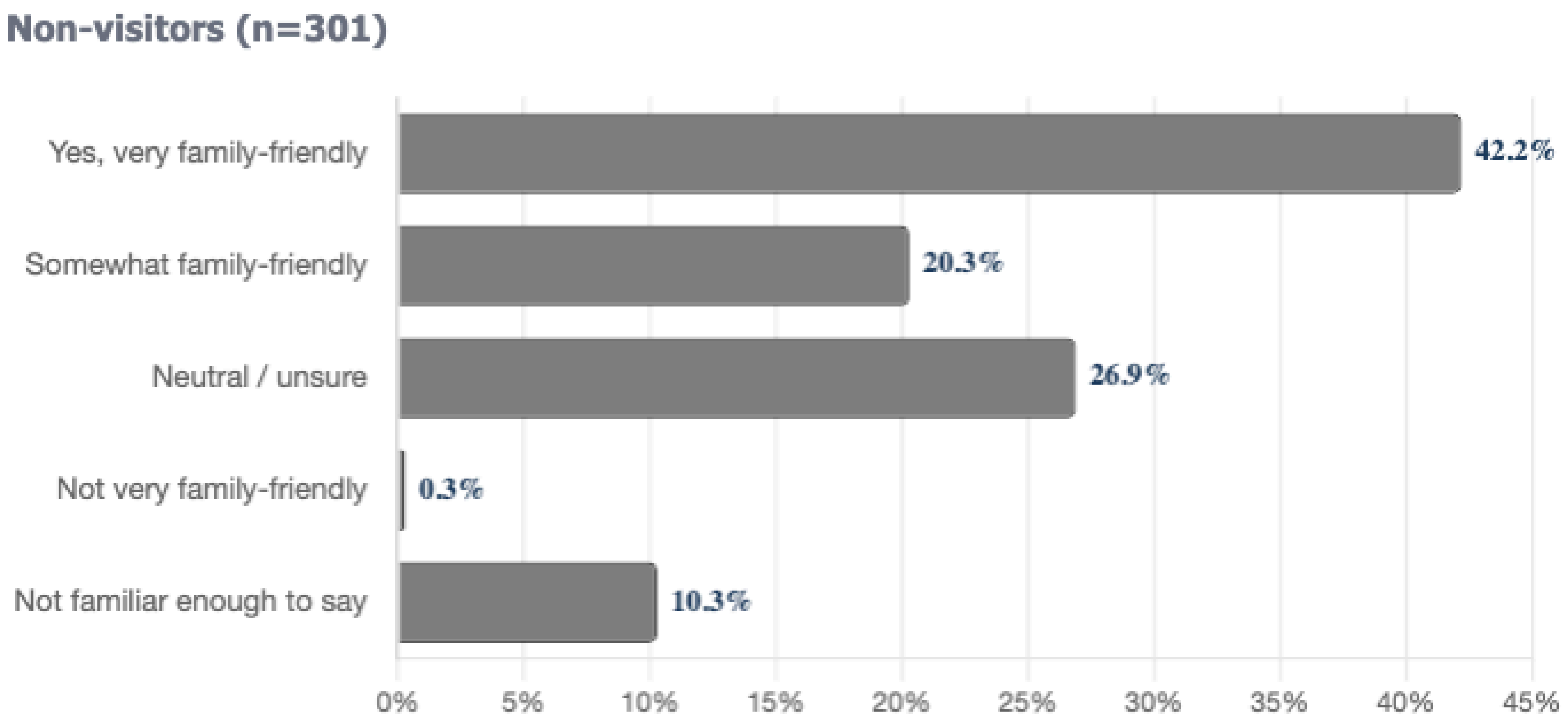
02

Non-visitors show notably higher uncertainty around Branson's appeal to younger travelers, indicating a positioning and awareness gap rather than a product gap. This creates an opportunity for marketing campaigns to better showcase contemporary experiences, nightlife, outdoor adventure, and younger traveler content.

Source: Branson Visitor & Market Perception Study

Is Branson family-friendly?





KEY TAKEAWAYS

01

Branson's family-friendly positioning is exceptionally strong among visitors, with more than 96% describing the destination as somewhat or very family-friendly. This confirms that family travel remains one of Branson's clearest and most consistently delivered brand strengths.

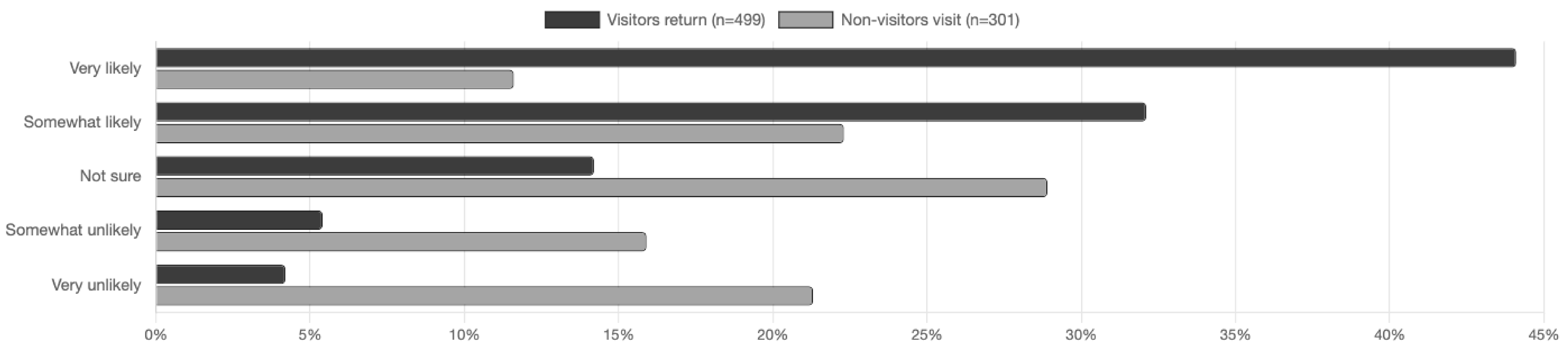
02

Non-visitors are also broadly positive about Branson's family appeal, but uncertainty remains significantly higher among those unfamiliar with the destination. This suggests Branson's family-friendly reputation is strong nationally, while deeper awareness of the full visitor experience still depends on firsthand familiarity.

Base: n = 800 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Full sample (n=800)

Return intent (visitors) vs visit intent (non-visitors)



KEY TAKEAWAYS

01

Past visitors show exceptionally strong loyalty to Branson, with the vast majority indicating they are likely to return within the next three years. This reinforces Branson's strength as a repeat-visit destination with high long-term visitor retention.

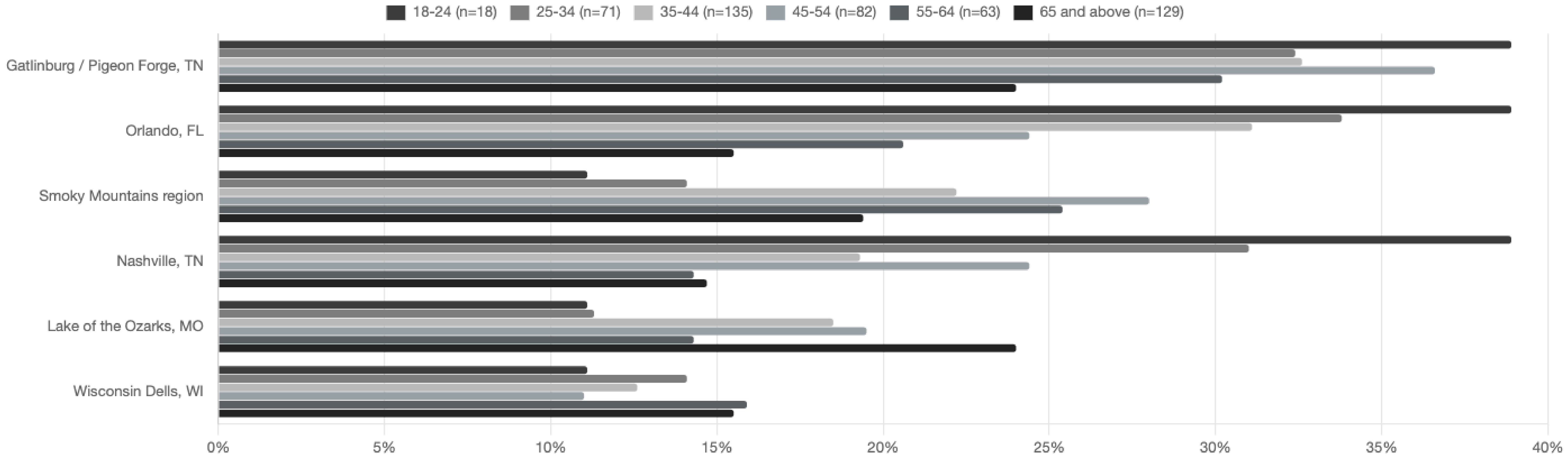
02

Non-visitors remain considerably more uncertain about visiting Branson, with higher levels of hesitation and "not sure" responses. This suggests the primary challenge is building greater awareness, familiarity, and relevance for the trip among new audiences.

Base: n = 800 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Full sample (n=800)

Visitor competitive set by age (top 6)



KEY TAKEAWAYS

01

Competitive destinations vary significantly by age group, but Gatlinburg/ Pigeon Forge consistently emerges as Branson's strongest cross-generational competitor. Orlando also performs particularly well among younger and family-age travelers, reinforcing the importance of entertainment-driven positioning.

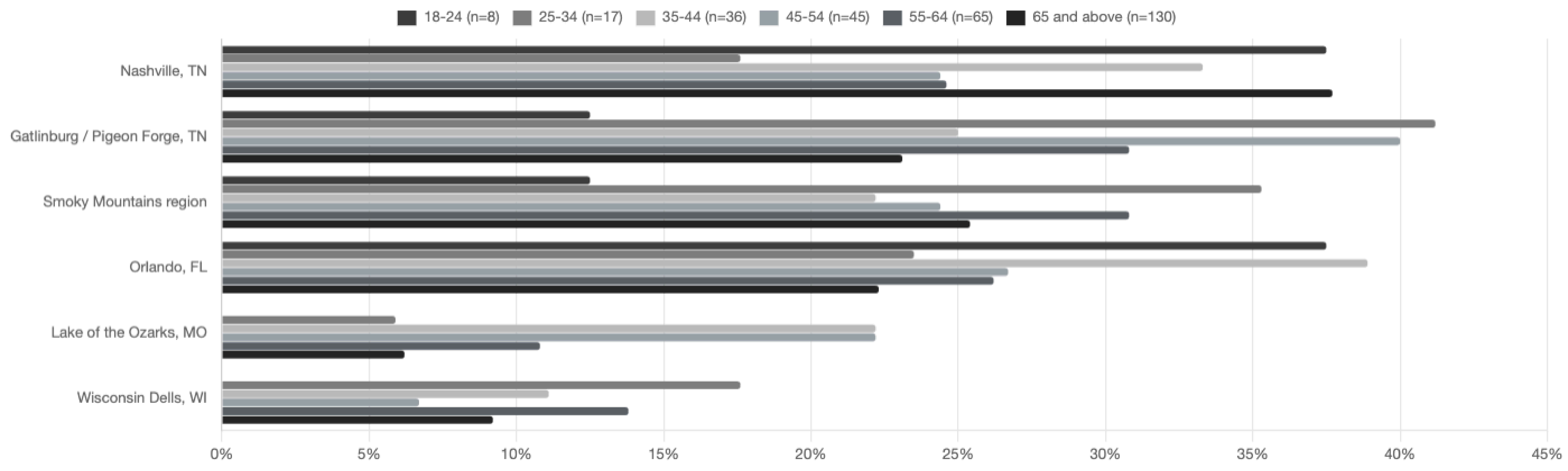
02

Older travelers are more likely to compare Branson with regional and drive-market leisure destinations such as Nashville and the Lake of the Ozarks, while younger audiences show stronger association with experience-heavy destinations like Orlando and the Smoky Mountains region.

Base: n = 499 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Visitor sample (n=499)

Non-visitor competitive set by age (top 6)



KEY TAKEAWAYS

01

Among non-visitors, Nashville, Gatlinburg/Pigeon Forge, and Orlando emerge as Branson's strongest competitive set across nearly all age groups. These destinations are consistently associated with entertainment, leisure, and regional getaway experiences.

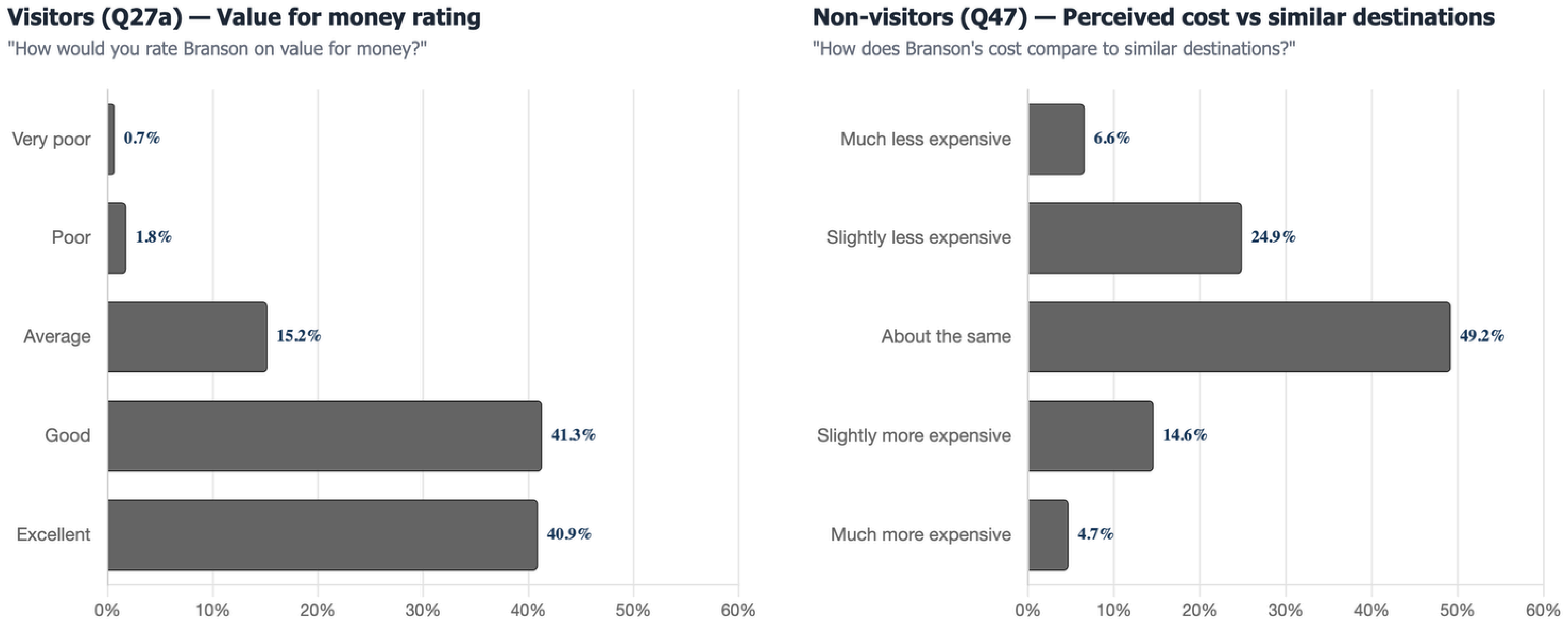
02

Younger and middle-age non-visitors show stronger alignment with Orlando and the Smoky Mountains region, while older travelers skew more toward Nashville and regional drive destinations. This suggests Branson competes differently by generation and may benefit from more age-targeted positioning strategies.

Base: n = 301 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Non-Visitor sample (n=301)

Cost / value perception (proxy comparison)



KEY TAKEAWAYS

01

Among visitors, the value-for-money verdict is overwhelmingly positive. Combining the top two boxes, 82.2% of visitors who stayed at a Branson property rate the value for money as "Excellent" (40.9%) or "Good" (41.3%).

02

Among non-visitors, the perception is also favorable on price-position. When asked how Branson's cost compares to similar destinations, 49.2% of non-visitors think it costs "About the same" as alternatives, 24.9% see it as "Slightly less expensive", and 6.6% as "Much less expensive". The dominant frame is that Branson is at parity with or below comparable alternatives like Nashville, Gatlinburg, Orlando or the Smoky Mountains.

Base: n = 800 respondents

Source: Branson Visitor & Market Perception Study, June 2026 — Full sample (n=800)

PART 04

Key Findings

Top destination-level conclusions synthesized from visitor and non-visitor data

Top Findings

01 STRONG REPEAT VISITATION

The research confirms that Branson sits atop an unusually loyal base of visitors. More than 76% of past visitors say they are at least somewhat likely to return within the next three years, and overall satisfaction with the destination is concentrated in the Excellent and Very Good range. At the same time, 38% of past visitors have not been back in more than three years. This should be read as the most accessible audience Branson has: already-converted travelers who need a reason and a path back.

02 ROOM TO GROW YOUNGER AUDIENCES

Current visitors already see Branson as relevant to travelers aged 25–44, especially for multi-generational trips, but non-visitors continue to picture Branson as a destination for older audiences. Among non-visitors aged 45 to 64, uncertainty about whether Branson would even appeal to a younger traveler rises significantly. Closing that gap is one of the highest-leverage growth opportunities in the study.

03 EVEN STRONGER SDC EXPERIENCE

Silver Dollar City is one of Branson's most loved assets: visited by 46% of all travelers, central to repeat visitation, and confirmed by visitors as offering enough content to justify a full day. The single area where satisfaction can climb even higher is around peak-day crowds: agreement that crowds at SDC negatively impact the experience is notably high, and because SDC is for many visitors the centerpiece of the trip, that friction ends up shaping the perception of the whole destination.

Top Findings

04 STRONG HOSPITALITY FOUNDATION

The lodging picture in Branson is genuinely strong: overall stay satisfaction is concentrated in the Very Satisfied and Satisfied tiers. The opportunity arises because demand is highly concentrated among a small number of properties. When complaints arise, most guests do feel staff resolved the issue, but a meaningful share leave with the concern unresolved, and that group is the one most likely to become an active detractor in reviews and word-of-mouth.

05 SHOULDER SEASONS READY TO SHINE

Visitation is currently concentrated in summer, while months like November and February remain significantly softer. At the same time, both visitors and non-visitors increasingly associate spring and fall with stronger value, suggesting a clear opportunity to grow shoulder-season demand through pricing, promotions, and seasonal positioning

06 THUNDER RIDGE NEW-AUDIENCE ENGINE

Among visitors who are familiar with the venue, the perception is strongly positive: the majority say that Thunder Ridge concerts "enhance significantly" Branson's appeal. A strong majority of non-visitors say that Branson, as a major concert and live-events destination, is appealing to them.

Top Findings

07 BRANSON WINS ON VALUE

While distance and cost are the main reasons people have not visited Branson, most non-visitors still perceive the destination as similarly priced or more affordable than comparable destinations. This suggests the challenge is about relevance and active consideration. Lower-income travelers are more affected by cost concerns, while higher-income travelers are more likely to prefer competing destinations. At the same time, affordable pricing and packages remain the leading driver of conversion across all income segments

08 CLEAR COMPETITIVE EDGE

Branson primarily competes with regional drive-market leisure destinations rather than large fly-in destinations. The data also highlights generational differences: Orlando resonates more with younger audiences, Nashville with older travelers, while Gatlinburg/Pigeon Forge appeals broadly across age groups. This creates a strong opportunity for more precise targeting and positioning.

09 LONG-HAUL MARKETS ON THE RISE

Overall, Branson's NPS profile is strong. The long-distance states like California and Texas report the highest scores, likely because travelers who put in more effort to get there leave more enthusiastic. Meanwhile, close-in regional markets like Iowa show lower NPS and higher passive/detractor rates. In parallel, the familiarity data show that Tennessee and Texas have strong destination awareness, while California and Florida have much lower familiarity.

PART 05

Key Takeaways

Key Takeaways

01 STRUCTURED REACTIVATION PROGRAM

Build a dedicated program for travelers who visited Branson between 2020 and 2023, treating them as a high-potential audience that already knows the destination and needs a reason to return. The first step is to consolidate CRM data with hotel and attraction partners into a single audience file, starting with the top lodging properties and the largest attractions. The creative should recognize the previous visit, present one concrete new reason to come back (a specific Thunder Ridge concert, a new Silver Dollar City attraction, the refreshed Christmas season), and include a pre-built bundle with lodging, tickets, and suggested travel dates so the traveler can book in a few clicks. The program should be measured as its own funnel, with clear visibility into reach, engagement, and bookings, so the team can refine offers and creative over time and turn this into a recurring source of qualified demand.

02 REPOSITION VISUAL AND EDITORIAL CONTENT AROUND THE 25-44 TRAVELER.

Refresh Branson's content strategy so that travelers in the 25 to 44 age range appear as the protagonists across photography, video and editorial storytelling. The anchor narratives should highlight Thunder Ridge concerts, Branson Landing's nightlife scene, outdoor activities on Table Rock Lake, and the growing food-and-beverage offer, with the traditional shows that built Branson's brand positioned as a complementary pillar that adds depth to the destination rather than defining it. Paid social campaigns should lean into younger creators and lifestyle-driven content in feeder markets where awareness is already strong, since those audiences are best converted with cultural cues that feel native to their feeds. This shift broadens the perceived appeal of Branson, strengthens relevance among the under-50 traveler, and reinforces the destination's evolution while still honoring the heritage that long-time visitors love.

03 PARTNER WITH SILVER DOLLAR CITY TO ELEVATE THE GUEST EXPERIENCE

Open a structured working dialogue with Silver Dollar City focused on three areas where operational improvements can deliver gains in visitor satisfaction: real-time queue information so guests can plan their day with confidence, peak-day flow management so the park feels comfortable even on its busiest dates, and pricing transparency so visitors arrive with a clear understanding of what is included. Branson can play a supporting role by sharing visitor sentiment data, benchmarking against best-in-class theme park practices, and helping organize a phased rollout plan with clear milestones. Strengthening the experience at the destination's most iconic attraction lifts overall trip satisfaction, improves word-of-mouth among first-time visitors, and protects the strong loyalty Silver Dollar City already enjoys among returning families.

Key Takeaways

04 LAUNCH A COLLABORATIVE QUALITY PROGRAM WITH HOTEL PARTNERS

Work with the hotel groups to launch a destination-wide quality program led by Explore Branson, built around three pillars that travelers consistently reward: audited cleanliness benchmarks, service recovery training that empowers staff to resolve issues on the spot, and total-price transparency at the booking stage so guests see the full cost before they commit.

To make the program visible to travelers, consider introducing a "Branson Approved Stay" designation (or similar) awarded based on observed satisfaction metrics rather than self-declaration. This gives prospective visitors a clear reference signal when choosing where to book, rewards properties that already deliver strong experiences, and creates a shared standard that lifts the destination as a whole.

05 BUILD DEDICATED CAMPAIGNS FOR THE SOFTER MONTHS OF THE YEAR

Develop two purpose-built campaigns that activate the periods just outside peak summer. A fall campaign should position Branson as the destination for mild-weather outdoor moments, leaning into Table Rock Lake, scenic drives, and the comfort of smaller crowds. A November campaign should lean fully into the Christmas product, with Silver Dollar City's Old Time Christmas as the headliner inside packaged hotel-plus-show offers that simplify the booking decision.

The unifying message across both campaigns should center on value, comfort, and the experience of having more of Branson to yourself, turning the off-summer window into one of the destination's most distinctive moments.

06 PLACE THUNDER RIDGE AT THE CENTER OF THE NEW-MARKET ACQUISITION STRATEGY

Use Thunder Ridge as the lead asset for reaching audiences who are not yet in Branson's traditional tourism funnel, with concert-led campaigns directed at feeder markets 300 miles or more out (Texas, Georgia, Florida) and integrated packages that bundle the concert ticket with two nights of lodging and a day at Silver Dollar City. Aligning the concert calendar with low-visitation months turns Thunder Ridge into a lever for soft-season demand, and building distribution partnerships with national ticketing platforms such as Ticketmaster and Live Nation places Branson directly in front of music-first audiences who discover the destination through an artist they already love. This positions Thunder Ridge as a true acquisition engine rather than just a programming highlight.

Key Takeaways

07 CREATE COMPARATIVE-VALUE CONTENT TAILORED BY SEGMENT

For the higher-income segment, position the destination around differentiated premium experiences such as private cabins, signature dinner programs, and VIP concert access, reframing value as exclusivity and access rather than savings. For travelers in the 100 to 300 mile drive markets, reinforce the proximity and low-friction angle with messaging built around the idea that a great weekend in Branson is closer and easier to plan than they realize. This segmented approach makes the message feel built for the traveler, lifts conversion among audiences that respond to relevance more than price, and preserves Branson's value perception without leaning on broad discounting.

08 DEVELOP SIDE-BY-SIDE COMPARATIVE MESSAGING AGAINST BRANSON'S PRIMARY COMPETITORS

Build a clear comparative narrative that highlights Branson's unique mix of live entertainment, family appeal, accessibility, and value, with creative tailored to each direct competitor in the consideration set. Against Orlando, lead with authenticity, outdoor experiences, the live concert calendar, and attractions that feel more approachable for the whole family. Against Nashville and the Gatlinburg / Pigeon Forge corridor, lead with the family-friendly atmosphere, the entertainment density, and the ease of a convenient regional getaway. Making the comparison explicit helps travelers shortlist Branson with confidence, sharpens the destination's positioning in moments of active choice, and turns competitive overlap into an advantage rather than a risk.

09 TREAT REGIONAL AND LONG-HAUL MARKETS WITH DISTINCT STRATEGIES

In Iowa and other regional markets where the audience is highly familiar, lead with what is new each season and reward repeat visitation through loyalty perks that span hotel, attraction, and dining partners, so the traveler feels there is always a fresh reason to come back. In California, Texas, and Florida, where visitor satisfaction is already high but familiarity is still building, scale up paid media investment, activate regional travel creators with strong local followings, and develop relationships with travel agents and group operators who can package Branson as a long-drive or one-stop-flight destination. This dual approach protects the regional base while opening a clear runway for sustainable long-haul growth.

Thank you

Branson Visitor & Market Perception Study