

Myrtle Beach
2010 Summer Visitor Assessment
- November 2010 -

Prepared By

Equation
research

Objectives:

- **Determine the success of recent advertising and marketing strategies**
 - How effective have our marketing efforts been in generating awareness, and which channels have had the most success?
- **Understand the First-Time Visitor Experience**
 - What are our new guests experiencing, and will they like it enough to return?
- **Revisit our Net Promoter Score**
 - How effective is the Myrtle beach experience in generating word-of-mouth recommendations?
- **Determine the impact of the Gulf of Mexico Oil Spill on summer visitors**
 - Did the Gulf of Mexico oil spill generate as many new visitors as expected?

Who we talked to:

- General Population respondents recruited to participate in the survey by email. The invitation was sent from Equation’s sample partners. General Population respondents were targeted residents of the following states: GA, KY, MD, NJ, NY, OH, PA, TN, VA, or WV.
- The Myrtle Beach Area Chamber of Commerce provided us with a randomly-generated list of people who had inquired about vacationing at Myrtle Beach.
- Respondents from both sample sources were required to have taken an overnight leisure trip to the Myrtle Beach area in May – August, 2010.

| | N-size | Margin of Error |
|-------------------------------|--------|-----------------|
| Total completes: | 2,104 | ±2.1% |
| General Population completes: | 480 | ±4.5% |
| MBCC database completes: | 1,624 | ±2.4% |

- Respondents were surveyed between September 30 – October 18, 2010.

Key Finding # 1

Our advertising is working

Travelers in our core market are definitely seeing the advertising. Among our summer visitors, **the vast majority have seen some form of Myrtle Beach area advertising** in the past six months (82%).

Overall, our ads have an extremely positive influence on decision-making.

- Half of First-Time visitors say the ads were somewhat or very **influential in their decision-making** (48%).

Key Finding #2

Our marketing strategy is working

At 85%, awareness of the *Visit Myrtle Beach* slogan is **substantially higher than the slogan for any other competitive destination**, demonstrating the effectiveness of our clear and consistent messaging.

Three-quarters of visitors are aware of the website address *VisitMyrtleBeach.com* (78%), while a similar proportion recognize the Myrtle Beach logo (74%).

Key Finding #3

The Gulf Coast oil spill impacted us, but not to the extent previously thought

One-third (34%) of our summer visitors considered a Gulf Coast destination, yet did not go. However, very few cited the Deepwater Horizon oil spill as the specific reason for their decision. Ultimately, **only 10% of our summer visitors altered their travel plans due to the oil spill.**

Key Finding #4

First-Time visitors love us, and are likely to return

Nearly all First-Time guests were somewhat or very satisfied with their experience here this summer (95%).

One out of ten First-Time visitors are already making plans to visit the Myrtle Beach area in 2011 (11%), and nearly half would 'definitely consider' returning (46%).

Key Finding #5

Our Net Promoter Score (willingness to recommend), at 82%, should be the envy of the vacation world

A significant majority of our guests highly recommend us. This represents considerable word-of-mouth equity for the Myrtle Beach area.

One-fifth of all visitors are already making 2011 plans (20%), and over a half would 'definitely consider' returning (56%).

Key Finding #6

Traffic, congestion, few direct flights a real CHALLENGE

Myrtle Beach - "Drive destination"

70% of your business between Easter and Labor Day.

23% agree transportation is a problem (3½ million visitors will "think twice")!

Are our 70% "repeaters" immune to transportation problems?

More visitors = more traffic!

8-10% fly to the area

14% say "lack of flights" will influence their decisions. (Shoulder season)

Not terrible today -- Important vulnerability!

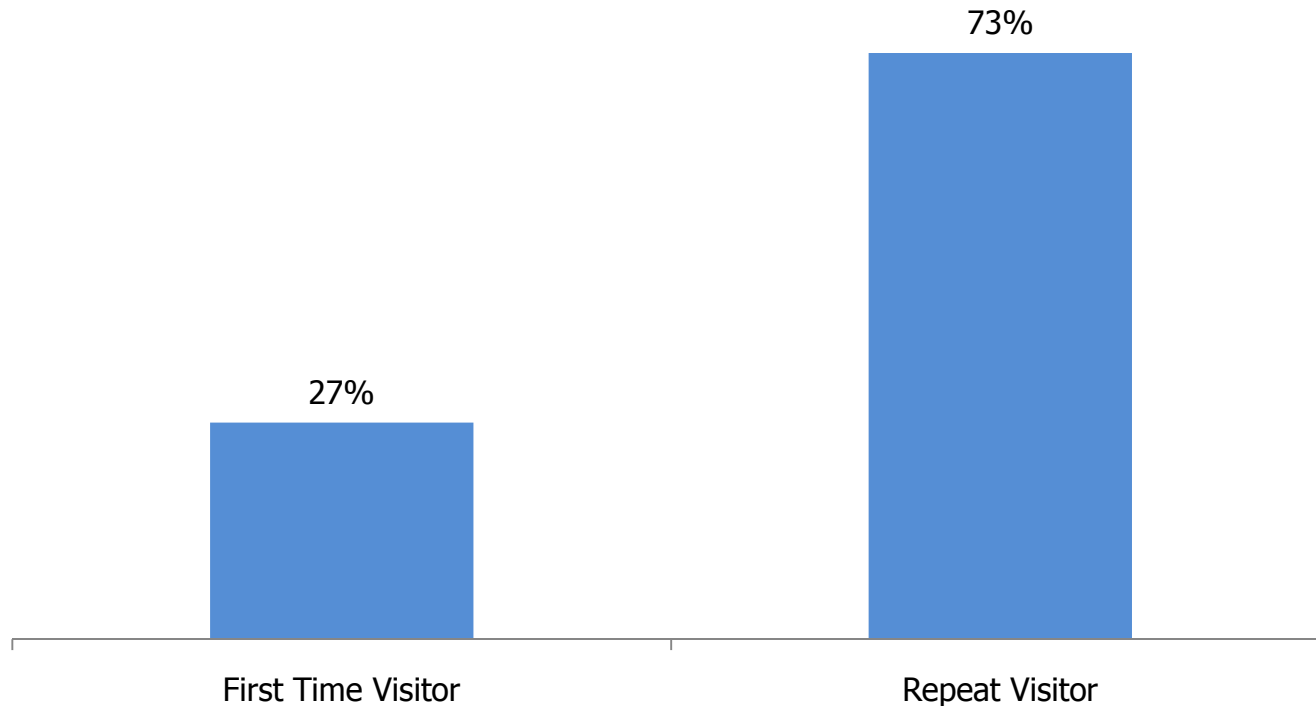


Myrtle Beach Summer Visitors

First-Time and Repeat Visitors

Over one-quarter of Myrtle Beach area summer visitors were here for the first-time. This amount of new guests is a great sign that marketing is successful... and word-of-mouth is spreading.

First-Time and Repeat Myrtle Beach Visitors

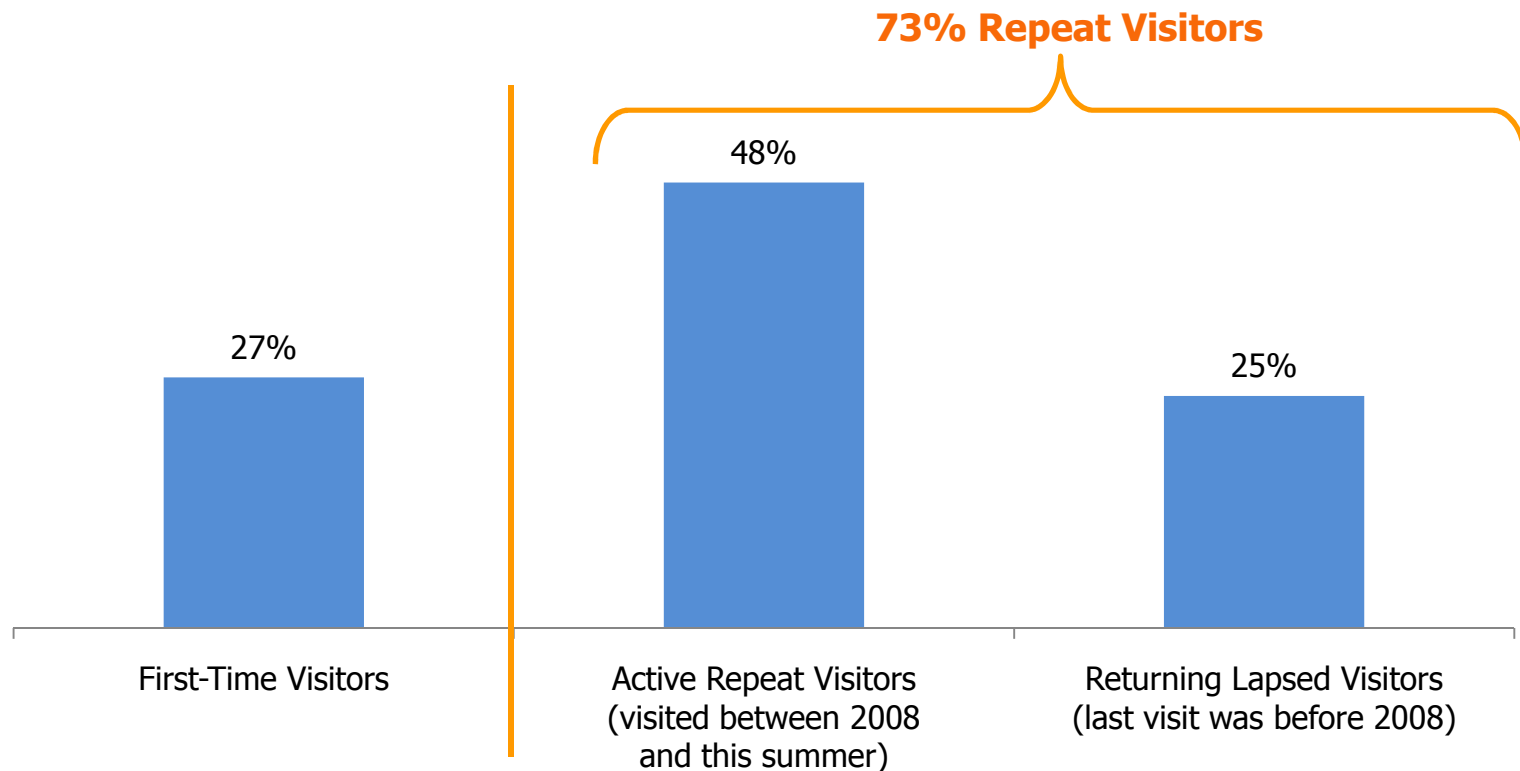


Base: Total (N=2104)

First-Time and Repeat Visitors

Most Repeat Visitors have been here within two years. However, this summer also saw the return of many guests who haven't been here in a while.

Previous Visitation to the Myrtle Beach Area



Base: Total (N=2104)

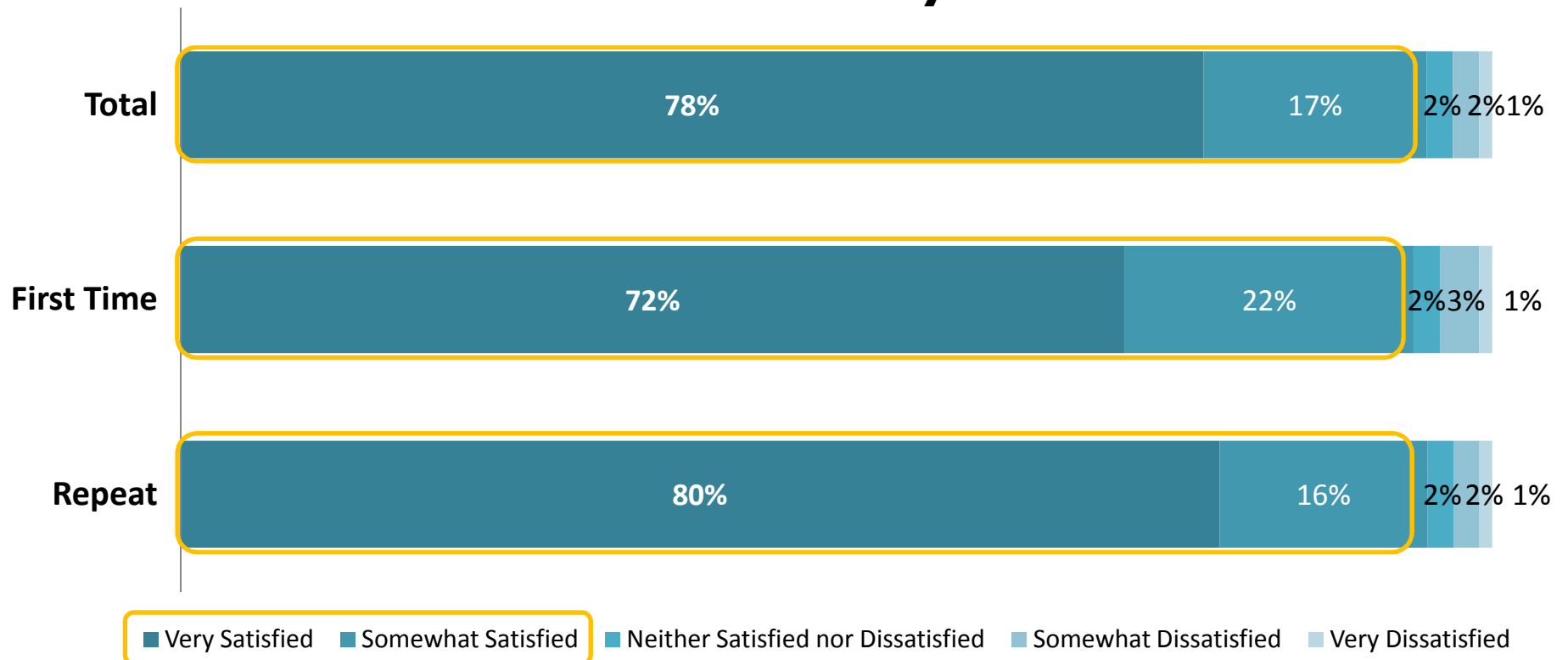
Q30. Was this your first visit to the Myrtle Beach area?

Q31. [IF NOT FIRST TIME] Besides your visit to the Myrtle Beach area this past summer, when else have you visited the Myrtle Beach area (please select all that apply)?

Satisfaction with Summer Visit

Virtually every First-Time and Repeat summer visitor was satisfied. Satisfaction translates into returning guests – an indication that the 'lifetime value' of a Myrtle Beach visitor is considerable.

Satisfaction with Summer Myrtle Beach Visit



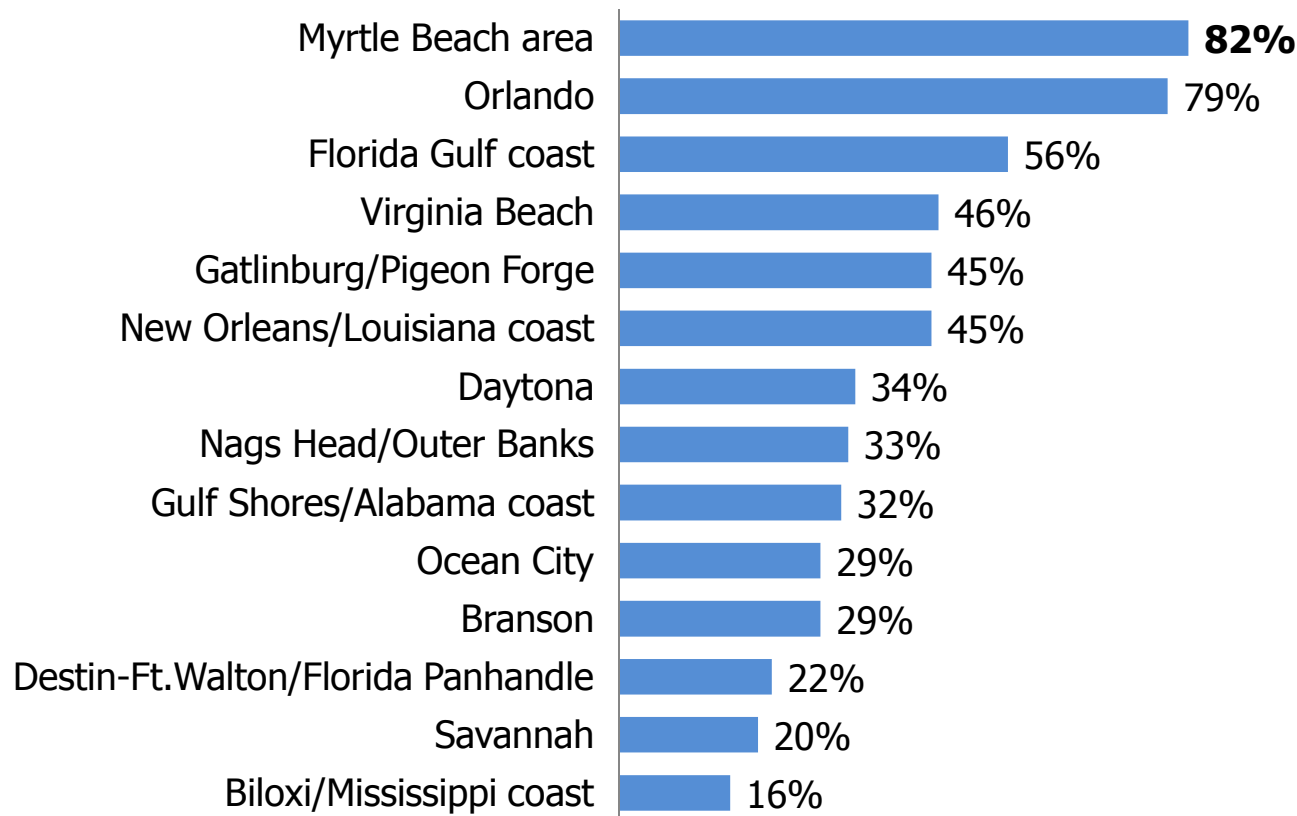
Base: Total (N=2104), First-Time (n=571), Repeat (n=1533)



Myrtle Beach Advertising

At 82%, most visitors have seen advertising for Myrtle Beach, nearly double the awareness of most competitor’s advertising. Only Orlando comes close, and that’s likely due to the lack of distinction between attraction ads (e.g. Disney, Universal) and “regular” Orlando destination ads.

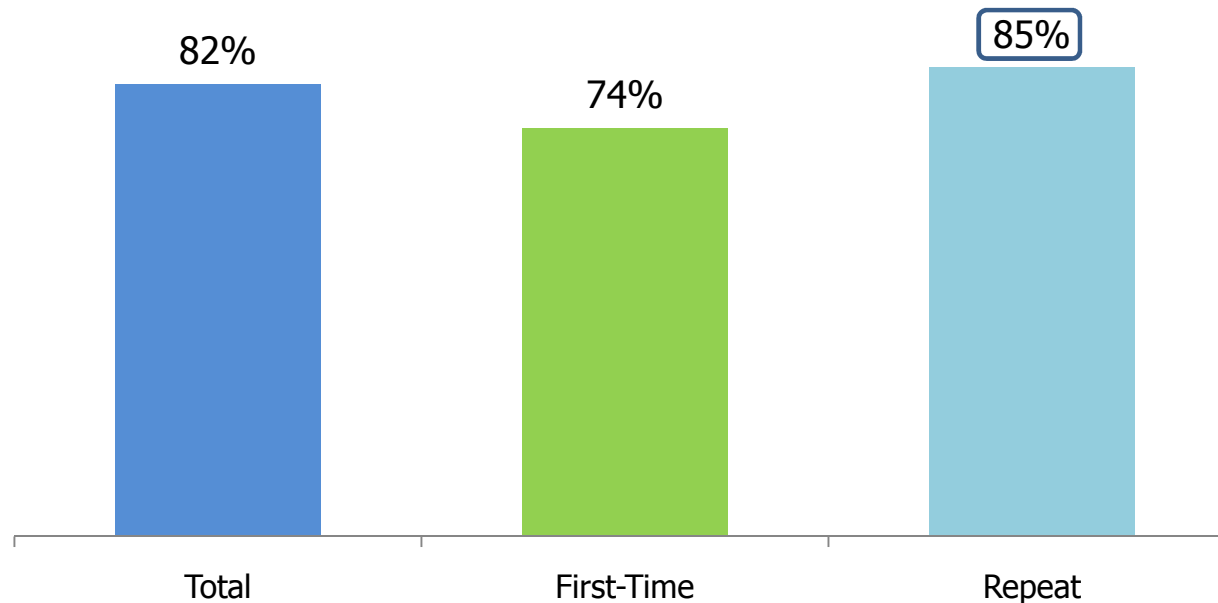
Destination Ad Awareness



Base: Total (N=2104)

Nearly all Repeat visitors have seen some type of Myrtle Beach advertising in the past 6 months. Although Repeat visitors are more keenly ad aware, First-Time visitor ad awareness is tremendously high in its own right.

Myrtle Beach Ad Awareness by Visitor Type

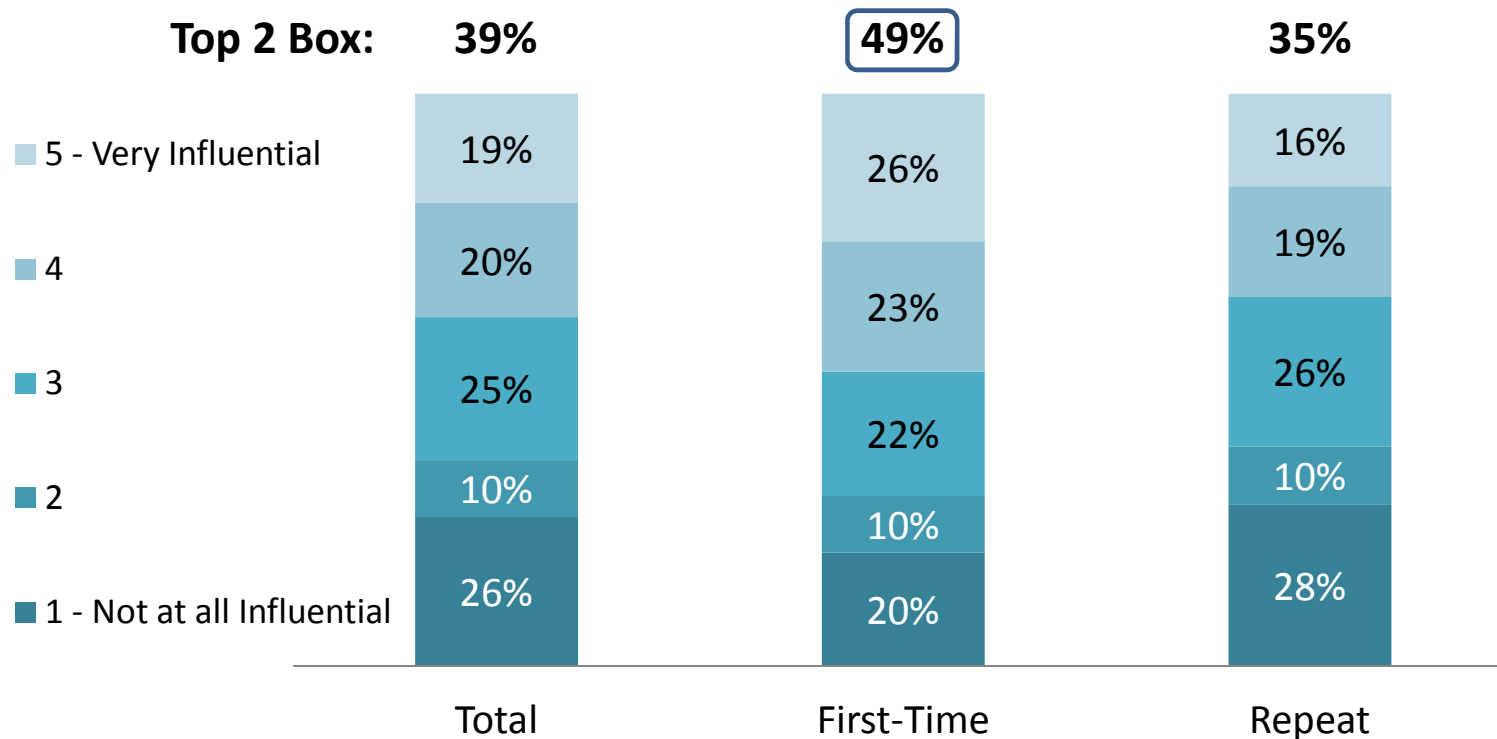


85% = Significant difference between First-Time and Repeat visitors at 95% confidence.

Base: Total (N=2104), First-Time (n=571), Repeat (n=1533)

Over a third of visitors say the advertising influenced their decision to travel to Myrtle Beach. First-Time visitors are significantly more likely than Repeat visitors to say the ads were persuasive in their decision to visit.

Influence of Myrtle Beach Ads



Base: Total (N=2104), First-Time (n=571), Repeat (n=1533)



Myrtle Beach Marketing Strategies

Destination Slogan Awareness

Awareness of our slogan, *Visit Myrtle Beach*, is substantially higher than the slogan for any other destination, demonstrating the effectiveness of direct, unencumbered messaging.

Destination Slogan/Tagline Awareness*

| Destination: | Tagline: | % Aware |
|--------------------------------|--|---------|
| Myrtle Beach area | <i>Visit Myrtle Beach</i> | 85% |
| Destin-Ft. Walton/FL panhandle | <i>The Emerald Coast</i> | 37% |
| Daytona | <i>Way More Than a Beach</i> | 21% |
| Branson | <i>Someone you love is always playing in Branson</i> | 18% |
| Savannah | <i>Your Savannah is Waiting</i> | 18% |
| Gulf Shores/Alabama coast | <i>Alabama's Beautiful Beaches</i> | 17% |
| Ocean City | <i>Sea for Yourself</i> | 10% |
| Virginia Beach | <i>Live the Life</i> | 9% |
| Biloxi/Mississippi coast | <i>Relax, it's the Mississippi Gulf Coast</i> | 9% |
| New Orleans/Louisiana coast | <i>You're Different Here</i> | 7% |
| Gatlinburg/Pigeon Forge | <i>Reach Higher Ground</i> | 4% |
| Nags Head/Outer Banks | <i>Different Experiences</i> | 3% |

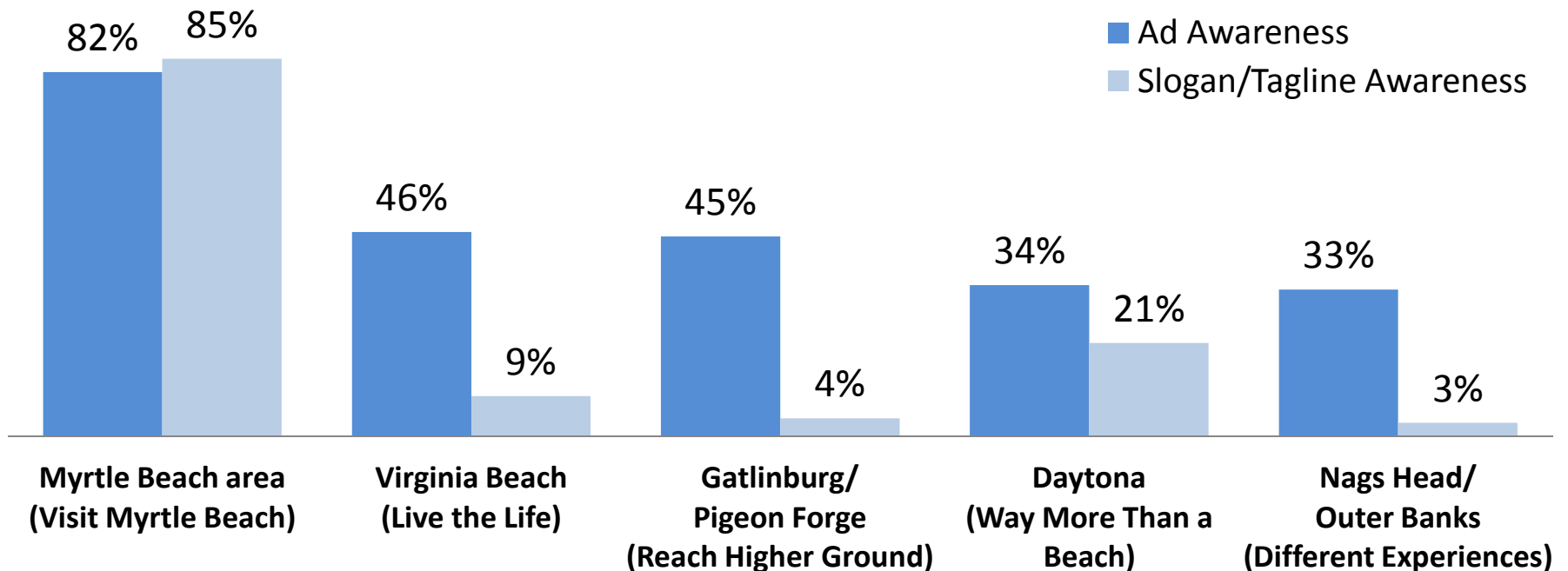
* A slogan for Orlando was not presented to respondents.

Base: Total (N=2104)

Destination Slogan Effectiveness

Awareness of the *Visit Myrtle Beach* slogan is on-par with Myrtle Beach ads; in fact, the slogan has slightly greater permeation than the ads. No other major competitive destination has such comparability between ad and slogan.

Destination Ad and Slogan Awareness



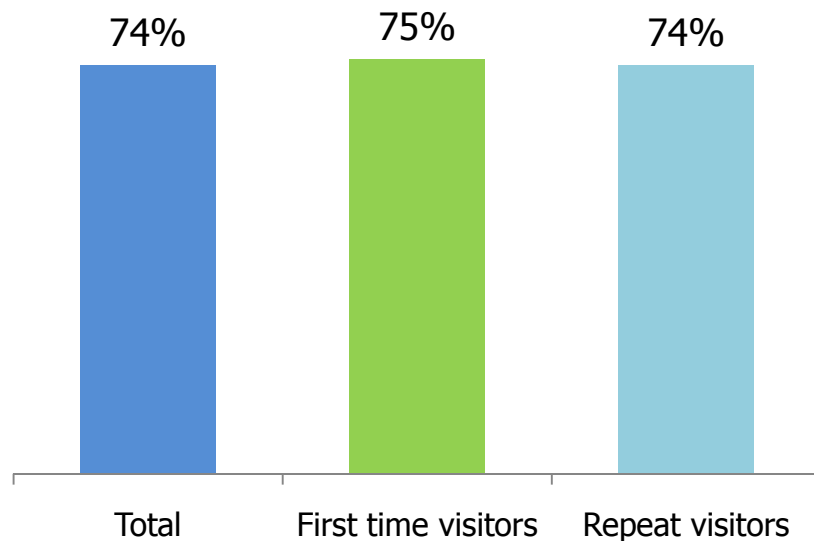
Base: Total (N=2104)

Q6. In the past 6 months, have you seen any advertising for the following destinations?
 Q8. Which of the following destination slogans or taglines have you seen or heard before (please select all that apply)?

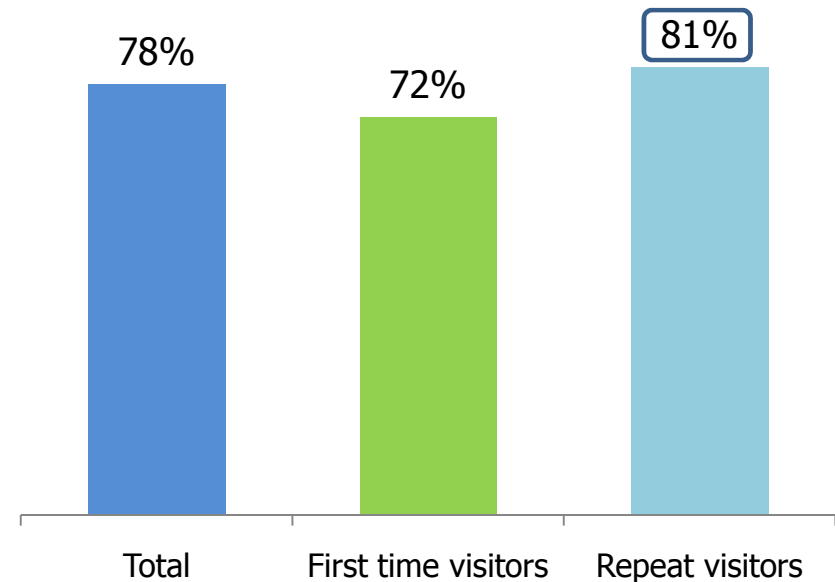
Logo and Web Address Awareness

Three-quarters of visitors recognize the Myrtle Beach logo, and a similar proportion are aware of the website address *VisitMyrtleBeach.com*. These levels of awareness further demonstrate the effectiveness of a clear and consistent marketing strategy.

MB Logo Awareness



VisitMyrtleBeach.com Awareness



81% = Significant difference between First-Time and Repeat visitors at 95% confidence.

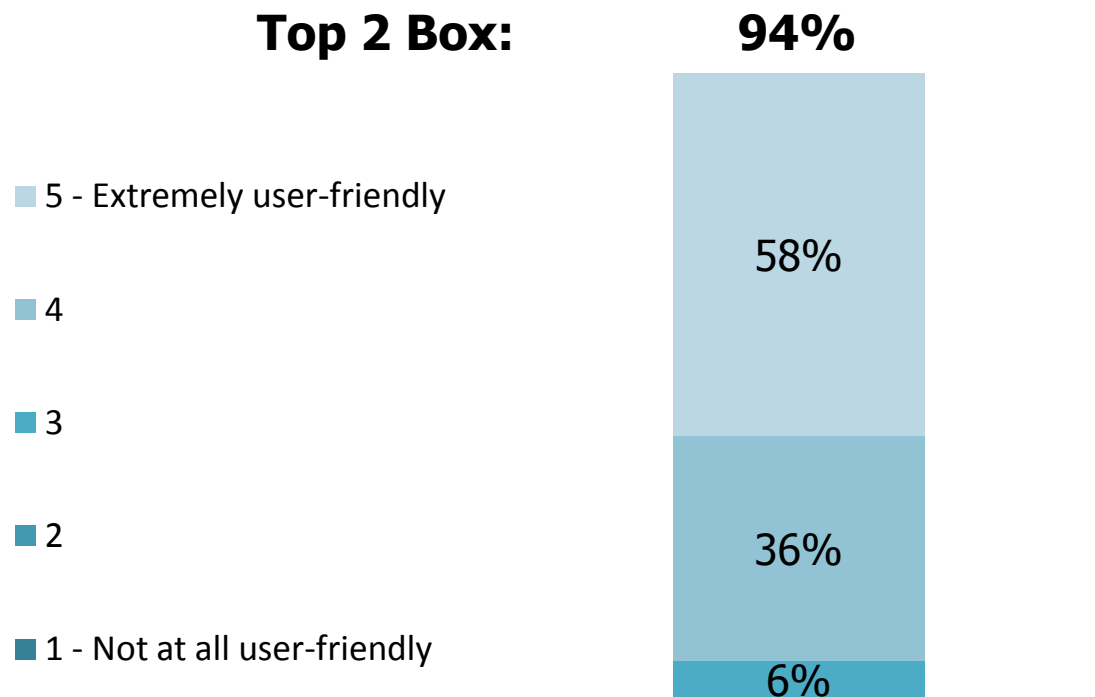
Base: Total (N=2104), First-Time (n=571), Repeat (n=1533)

Q9. Have you ever seen this logo before?

Q10. Have you ever seen or heard the website address "VisitMyrtleBeach.com" in any advertisements?

Almost all visitors feel that the VisitMyrtleBeach.com website is very user friendly. None feel that the site is difficult to use. Great News!

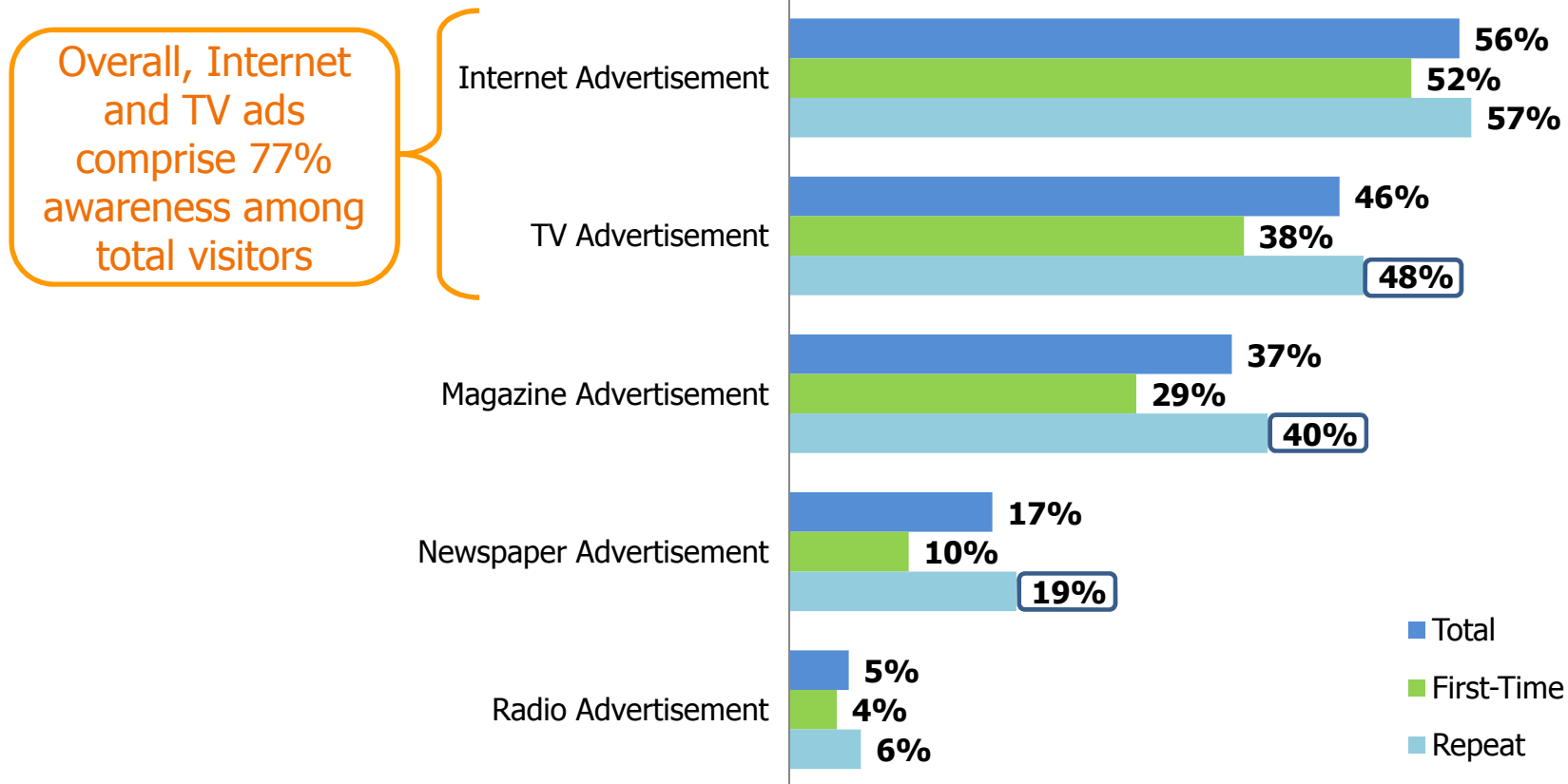
Usability of VisitMyrtleBeach.com



Base: Used the VisitMyrtleBeach.com website (N=1272)

Ad Awareness by Media Type

Internet advertising generates the most awareness, followed closely by television advertising. Print media, such as magazine and newspaper ads, still generate a fair amount of awareness.



 = Significant difference between First-Time and Repeat visitors at 95% confidence.

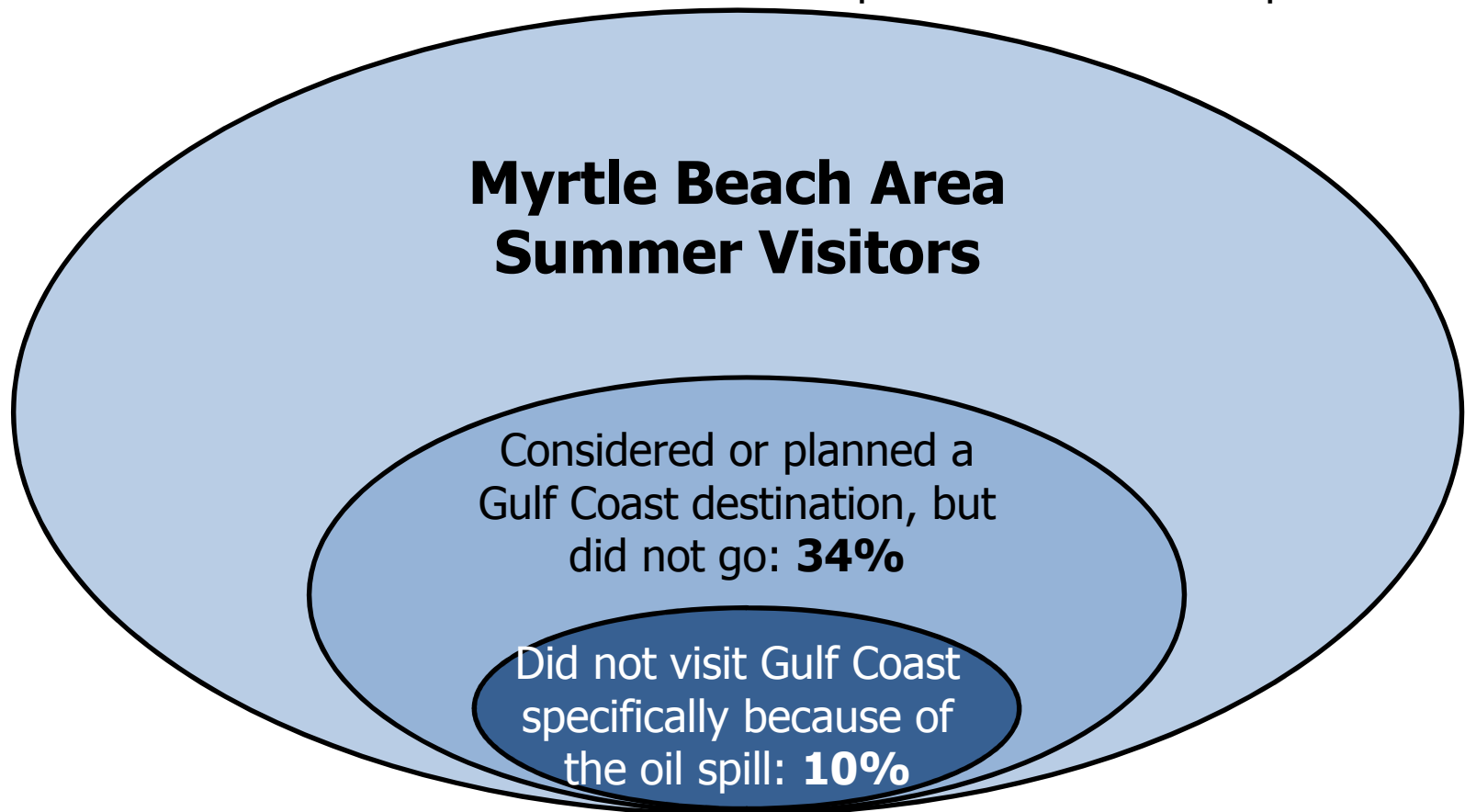
Base: Recall some form of Myrtle Beach advertising: Total (N=1721), First-Time (n=421), Repeat (n=1300)



Gulf Coast Destinations and the Oil Spill Impact

Gulf of Mexico Oil Spill Impact

Approximately one-third (34%) of visitors considered a Gulf Coast destination this summer, yet did not go. Of this group, very few cited the Deepwater Horizon oil spill as the specific reason for their decision not to visit the Gulf. Ultimately, only 10% of our summer visitors altered their travel plans due to the oil spill.



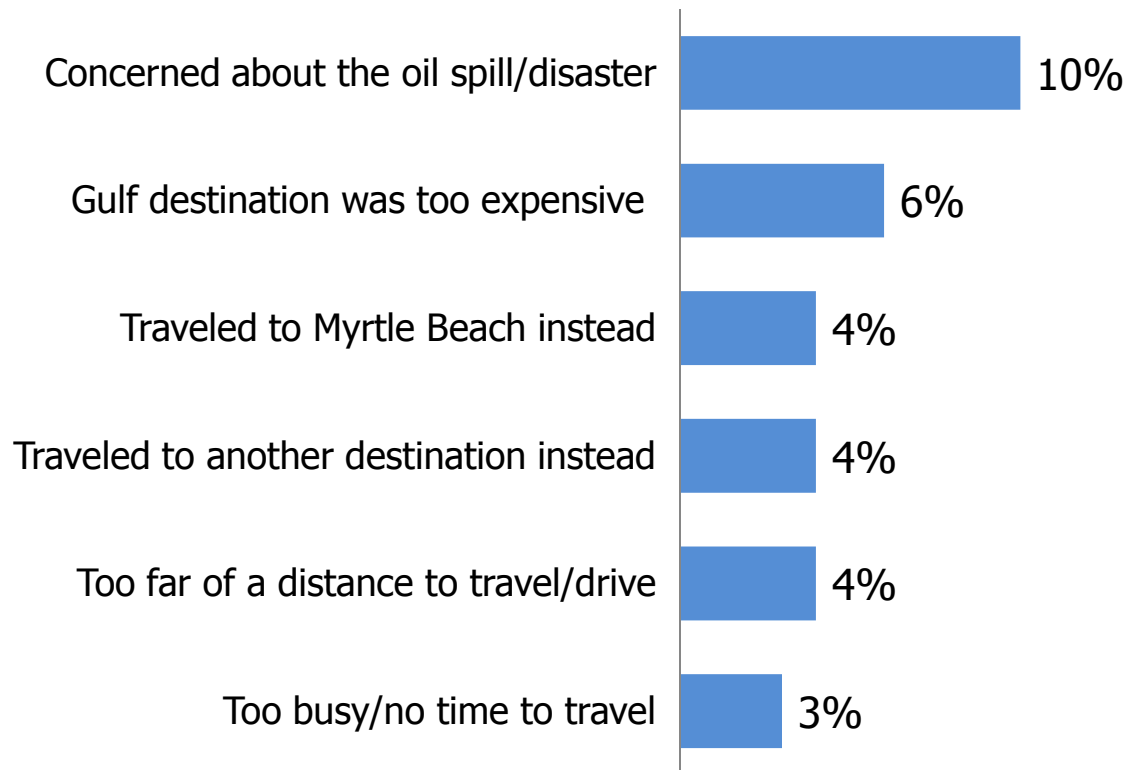
Base: Total (N=2104)

Q3. For each of the following destinations, please indicate if you considered, planned, or actually visited this past summer (May through August):
Q4. You mentioned you considered visiting a destination on the Gulf of Mexico, but did not go. Why is that?

Reasons For Not Visiting Gulf Coast

Although the oil spill is the primary reason people did not visit the Gulf Coast, the overall incidence of those citing this is low.

Reasons for Not Visiting Gulf Coast*



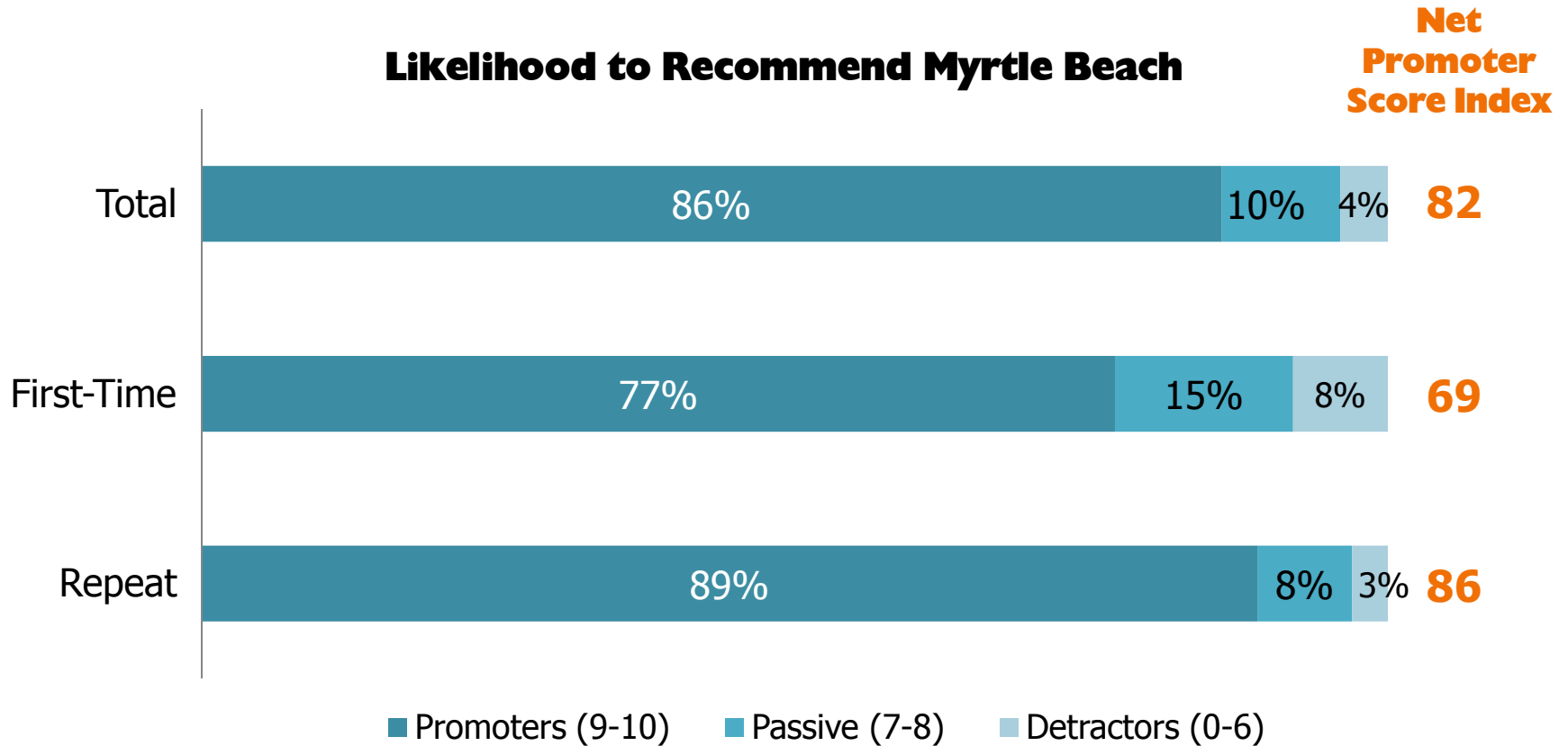
**Based to Total Summer Visitors (N=2104) to demonstrate overall impact among Visitors.*



Net Promoter Score and Interest in Visiting

Net Promoter Score Index

We have an outstanding Net Promoter Score – 82% among Total visitors. This represents considerable word-of-mouth equity for the Myrtle Beach area.

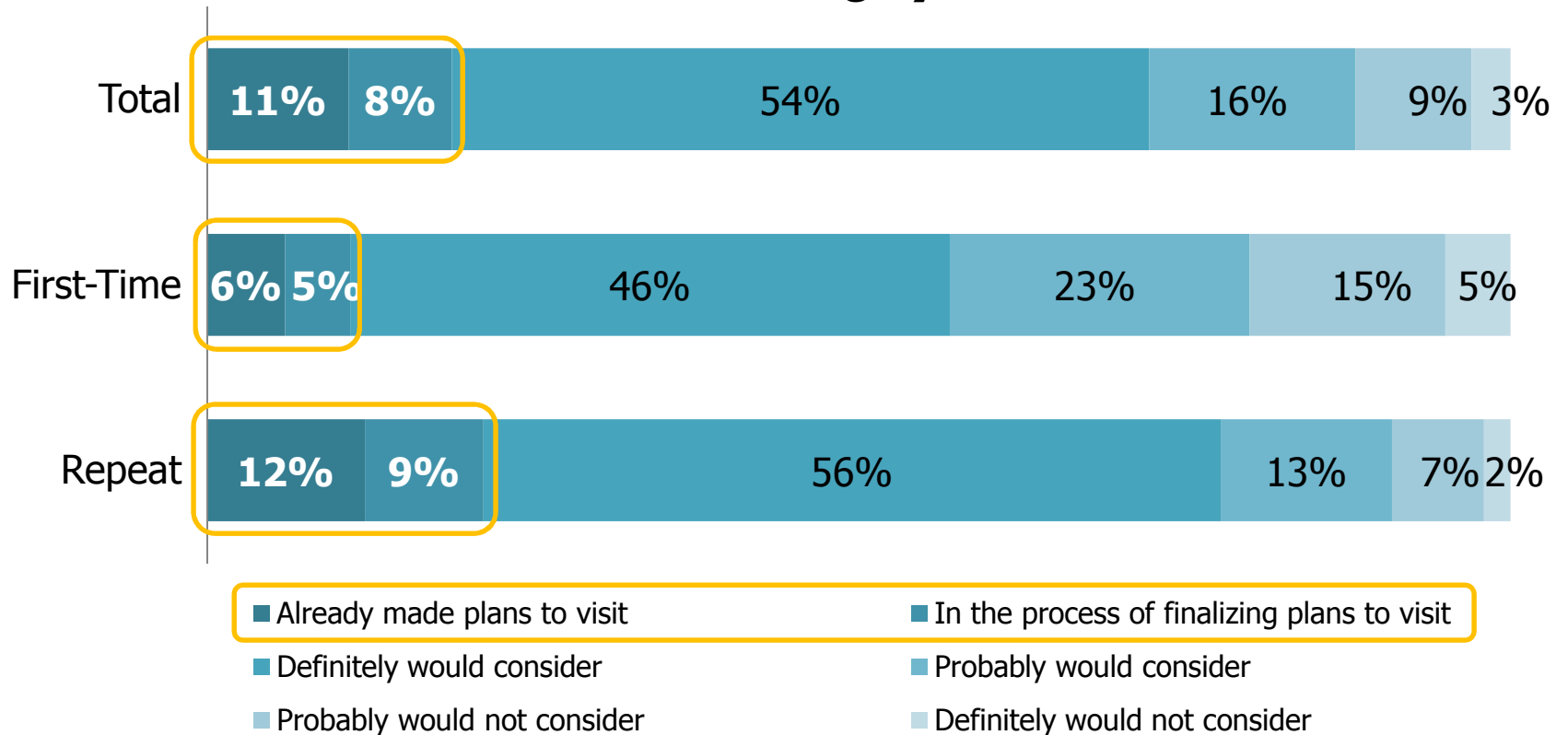


Base: Total (N=2104)

Likelihood of 2011 Myrtle Beach Visit

While our repeat business is strong given the timeshare-heavy accommodation structure, one-fifth of all visitors are already making 2011 plans to return and over half would 'definitely consider' returning.

Likelihood of Visiting Myrtle Beach in 2011

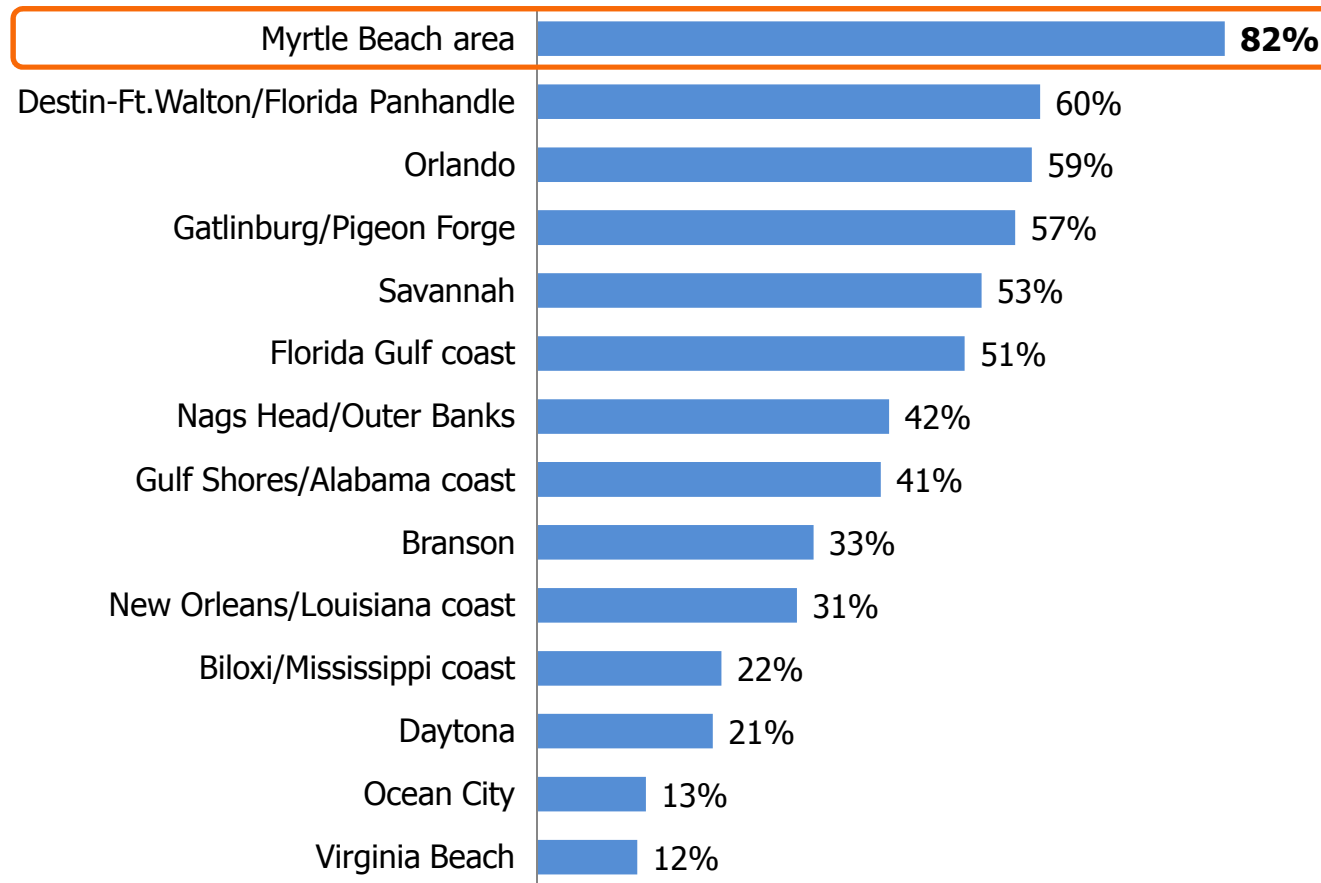


Base: Total (N=2104)

Net Promoter Score vs. Others

This high Net Promoter Score really stands out above our competition ...

NPS Scores

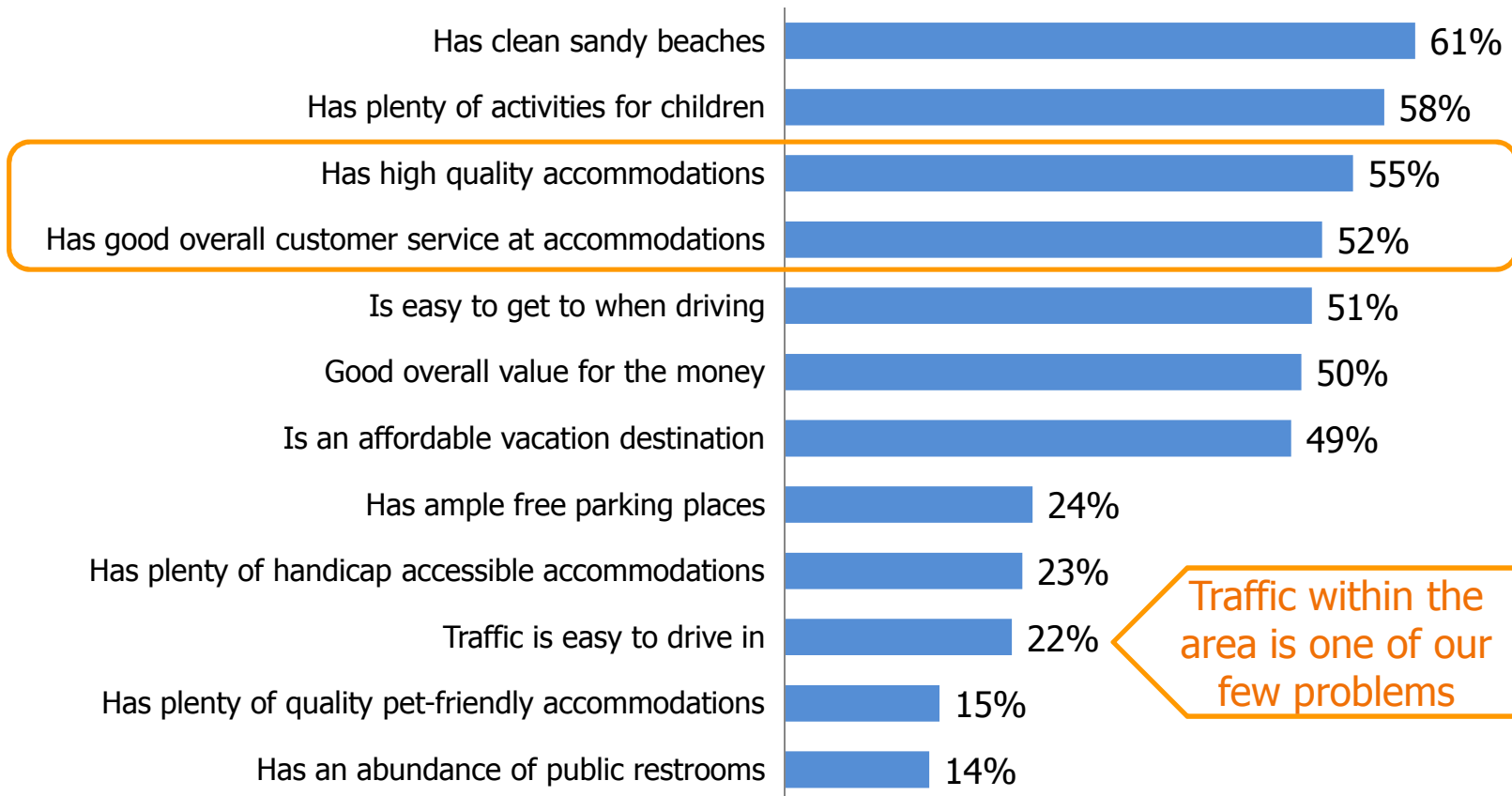


Base: Total (N=2104)

Myrtle Beach Perceptions

In addition to having clean beaches, we're perceived as being family-oriented. In addition, over half of visitors strongly agree that we have high-quality accommodations with good customer service.

Strongly Agree (Top-Box) with Statements About Myrtle Beach



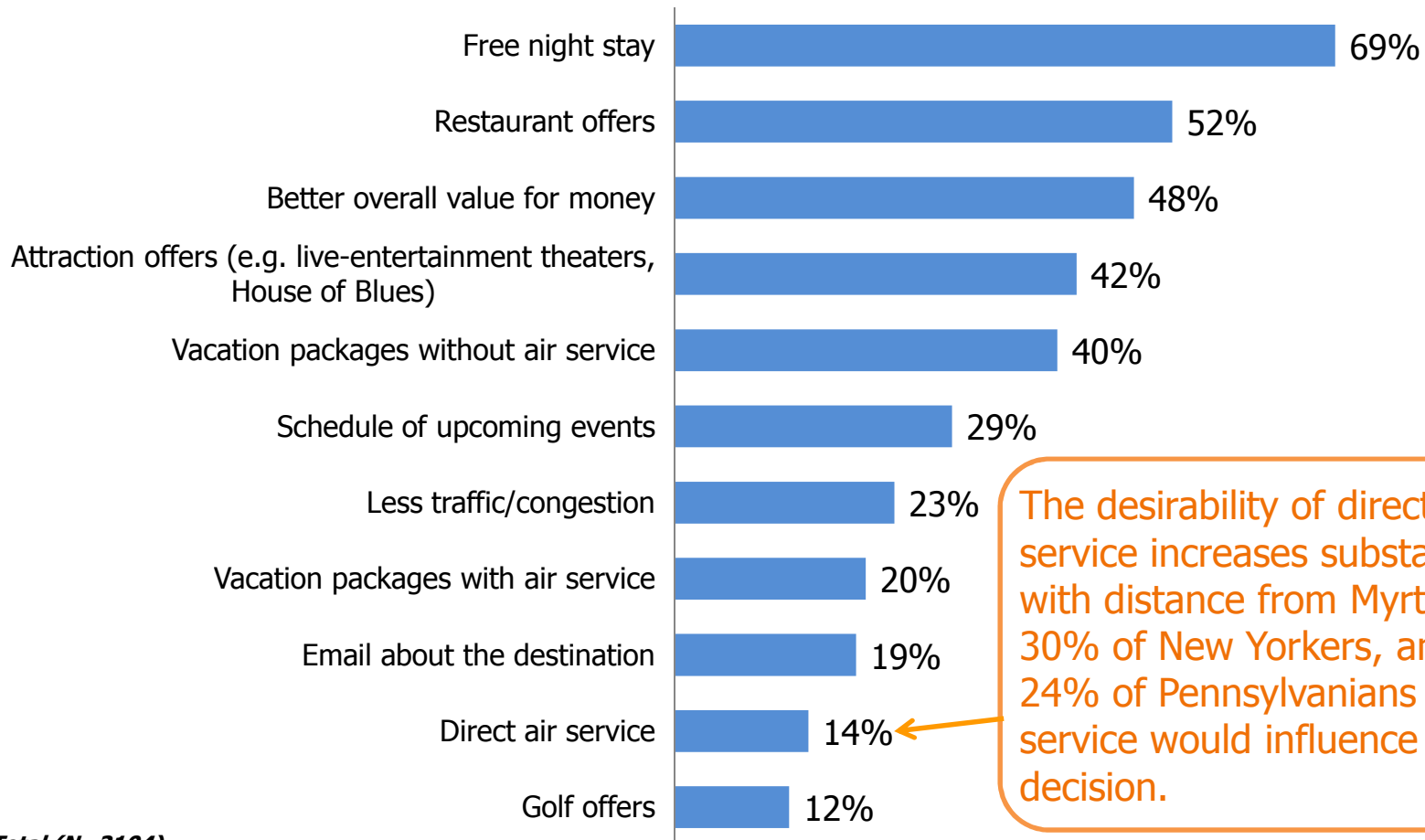
Base: Total (N=2104)

Q. Please rate your level of agreement with the following statements about the Myrtle Beach area (1-5 scale):

Influential Factors

Not surprisingly, visitors say that value-oriented promotions, such as a free night and restaurant offers, would get them to return.

Factors Influencing Likelihood to Return



The desirability of direct air service increases substantially with distance from Myrtle Beach: 30% of New Yorkers, and 24% of Pennsylvanians say direct service would influence their decision.

Base: Total (N=2104)

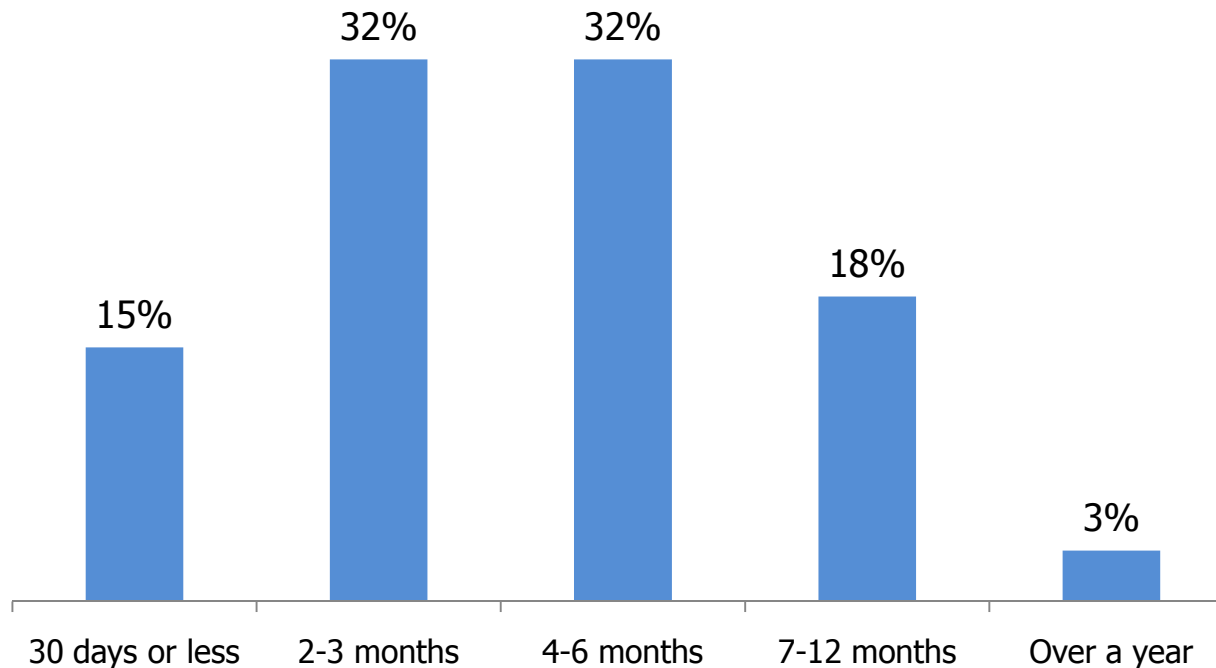


Summer Trip Planning and Information Sources

Advance Trip Planning

About a third of visitors began planning their Myrtle Beach vacation 2-3 months in advance. Another third started 4-6 months before their departure.

Advance Trip Planning for Summer Trip



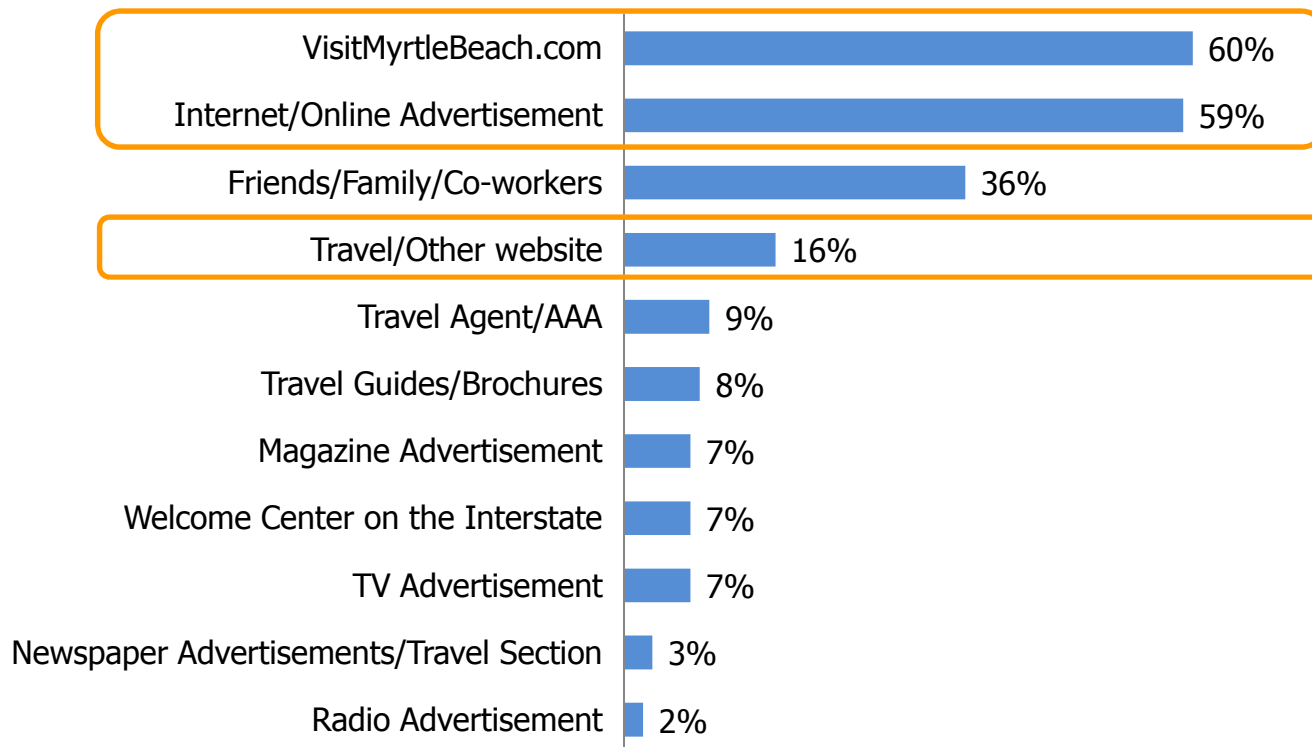
Base: Total (N=2104)

Q17. How far in advance did you begin planning your most recent trip to the Myrtle Beach area?

Information Sources Used

Over half of visitors used the VisitMyrtleBeach.com website as an information source, and other Internet sources were just as popular. Our guests also rely heavily on friends and family for advice on the area, demonstrating the strength of word-of-mouth in trip planning.

Information Sources Used in Planning Summer Trip



Base: Total (N=2104)

Usefulness of Information Sources

VisitMyrtleBeach.com and other Internet sources are considered the most useful planning resources.

Usefulness of Information Sources

| | Extremely Useful (Top-Box) | Useful (Top-2-Box) |
|---|-------------------------------|-----------------------|
| VisitMyrtleBeach.com | 53% | 72% |
| Internet/Online Advertisement | 52% | 69% |
| Friends/Family/Co-workers | 47% | 63% |
| Radio Advertisement | 41% | 56% |
| Travel Agent/AAA | 37% | 50% |
| Welcome Center on the Interstate | 36% | 53% |
| Travel/Other website | 36% | 56% |
| Travel Guides/Brochures | 33% | 48% |
| Newspaper Advertisements/Travel Section | 32% | 39% |
| Magazine Advertisement | 26% | 36% |
| TV Advertisement | 24% | 38% |

Base: Total (N=2104)

Q19. How useful were each of the following in planning your most recent vacation to the Myrtle Beach area?

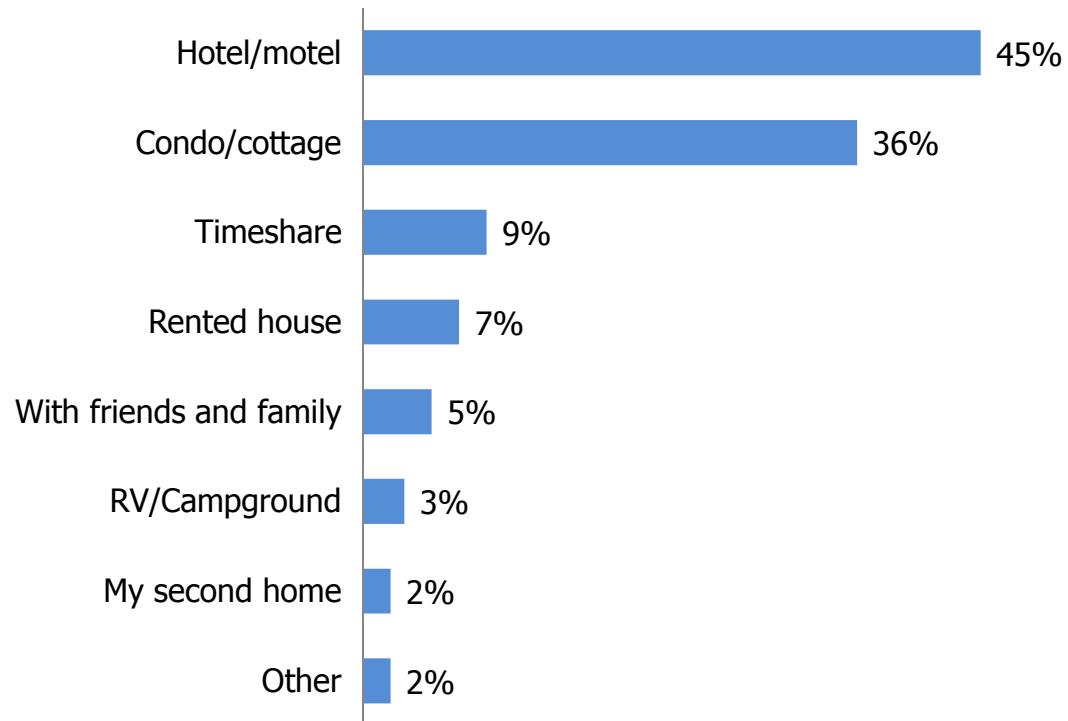


Summer Visit Trends

Summer Visit Trends

Nearly all visitors stayed in paid accommodations, divided nearly evenly between hotel/motel accommodations and timeshare/rental properties.

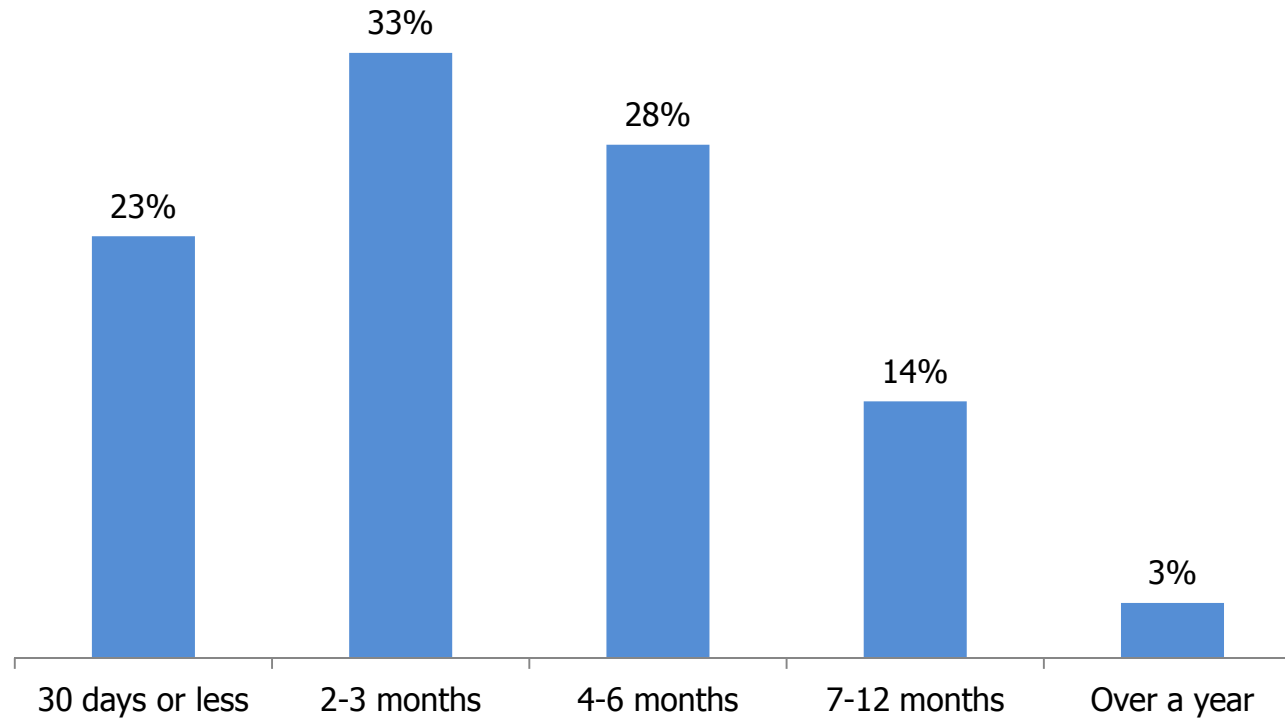
Accommodation Type



Base: Total (N=2104)

Over half of visitors make lodging reservations within three months of arrival.

Advance Booking of Accommodations



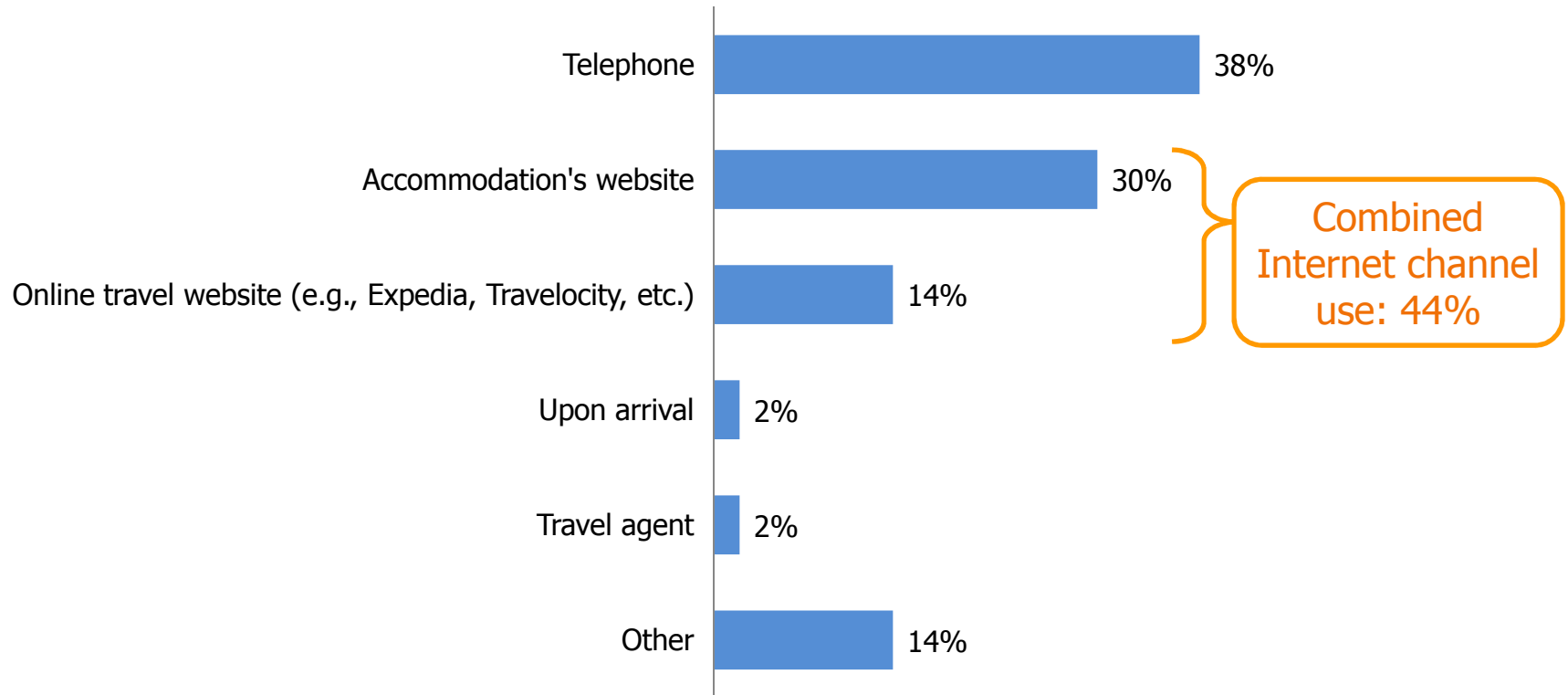
Base: Total (N=2104)

Q22. And how far in advance did you actually make reservations for accommodations?

Summer Visit Trends

Overall, the Internet is the most popular booking method for visitors. The telephone ranks a close second.

Reservations Channel

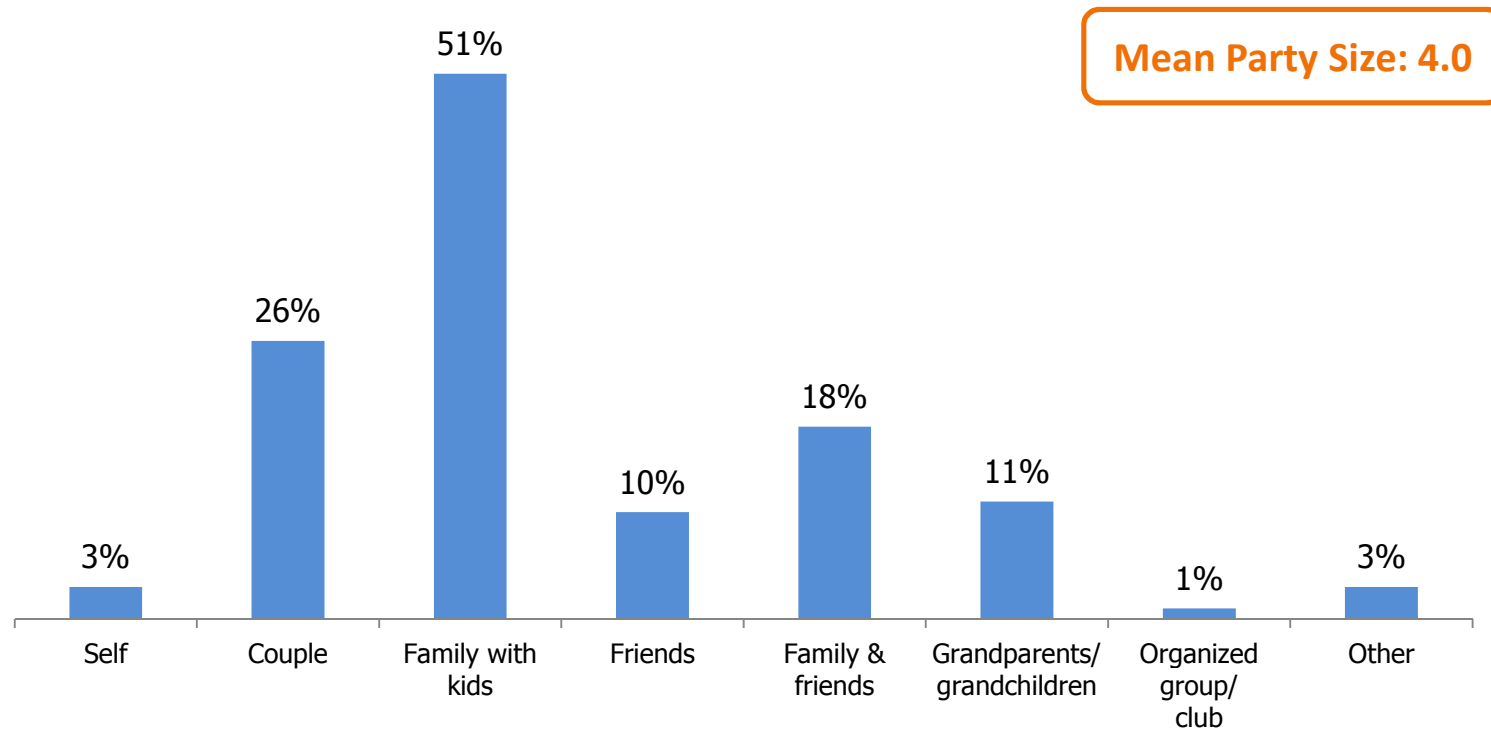


Base: Total (N=2104)

Summer Visit Trends

Most visitors traveled with their family – either just a spouse, with children, or even grandchildren and grandparents.

Party Composition



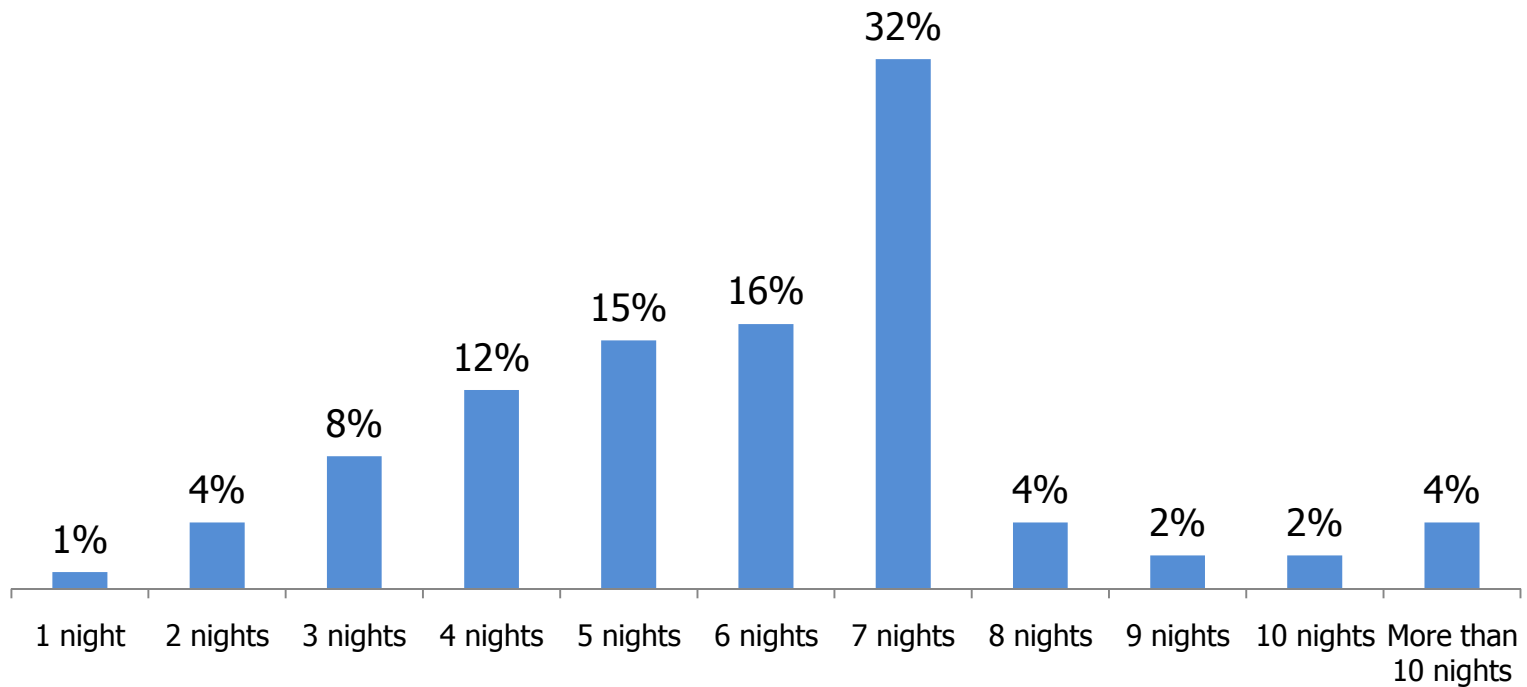
Base: Total (N=2104)

Q26. Which of the following best describes the travel group you were with on your most recent leisure trip to the Myrtle Beach area?

Accommodations Patterns

Most guests spent seven nights or less during their last trip to Myrtle Beach.

**Length of Trip
(Paid and Unpaid Accommodations)**



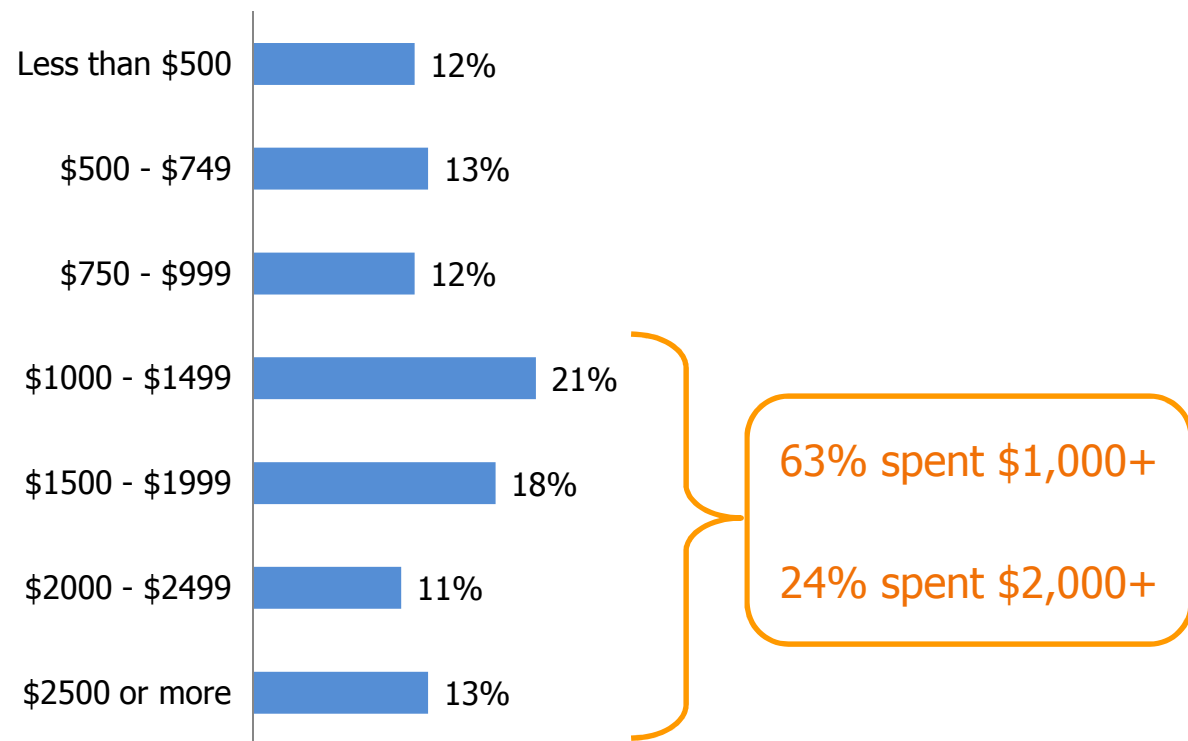
Base: Total (N=2104)

Q28. How many total nights did you spend in the Myrtle Beach area?

Summer Visit Trends

Almost two-thirds of visitors said they spent over \$1000 on their most recent visit with us.

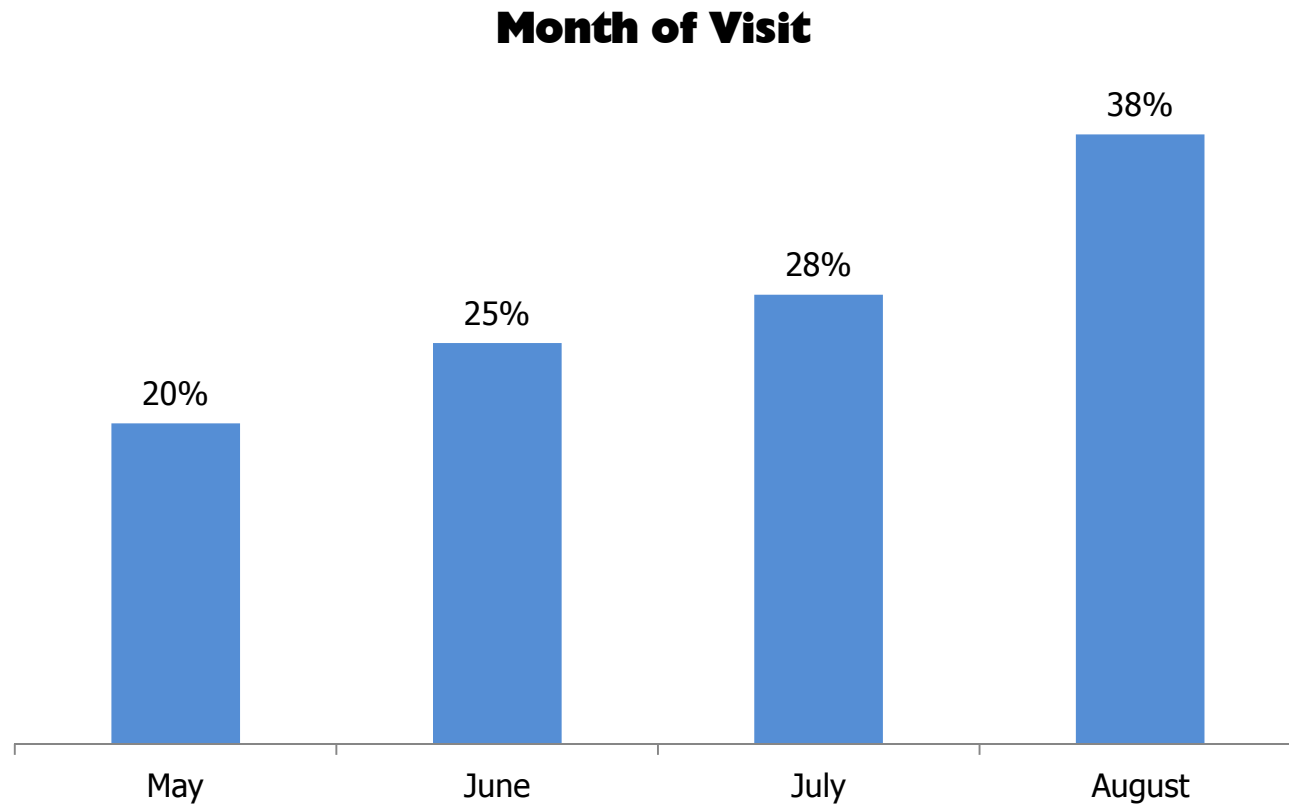
Amount Spent



Base: Total (N=2104)

Summer Visit Trends

Over a third of visitors came to Myrtle Beach during the month of August. Only 1 in 5 came in June.

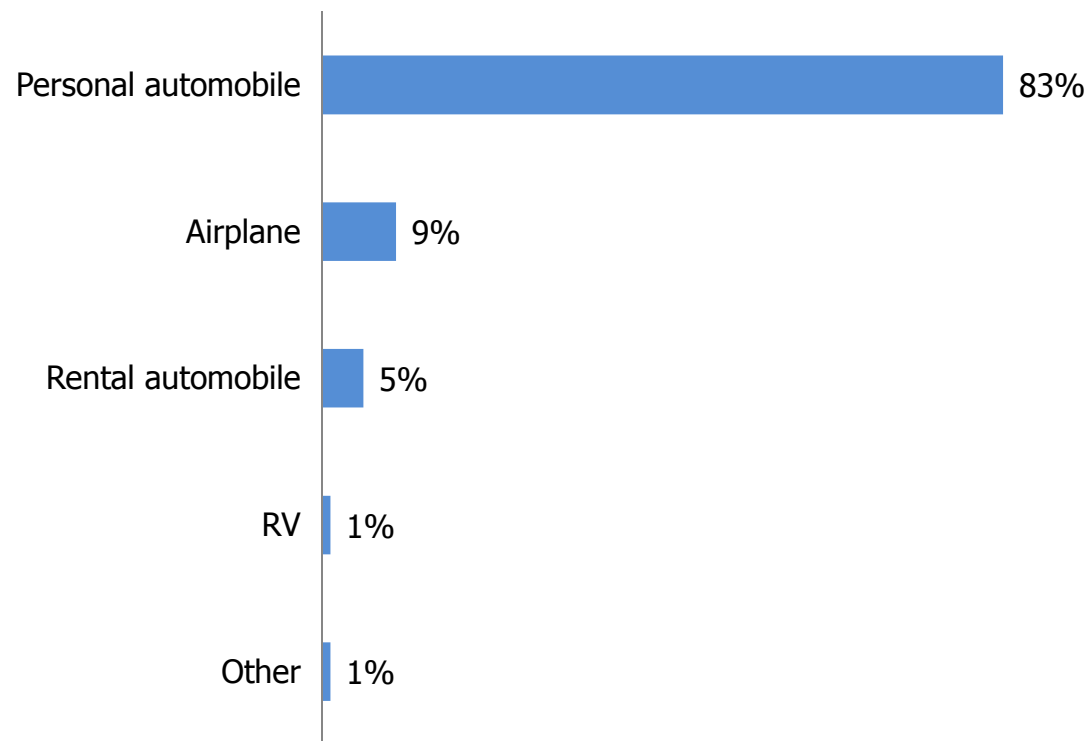


Base: Total (N=2104)

Q24. During which month(s) did you visit the Myrtle Beach area during this past summer season (May through August)? Please select the month(s) in which you arrived. If you visited more than once, please select all months that apply.

Nearly all visitors came by car, either personal or rental.

Mode of Transportation



Base: Total (N=2104)



Respondent Profile

Respondent Profile

| | Respondents % |
|------------------|------------------|
| Age | |
| Under 25 | 4 |
| 25 to 34 | 14 |
| 35 to 44 | 26 |
| 45 to 54 | 30 |
| 55 or older | 26 |
| Mean Age (years) | 45.8 |
| Gender | |
| Male | 32 |
| Female | 68 |

Respondent Profile

| | Respondents % |
|--------------------------------|------------------|
| Marital Status | |
| Married | 79 |
| Single | 11 |
| Separated/Divorced/Widowed | 10 |
| Annual Household Income | |
| Less than \$45,000 | 21 |
| \$45,000 - \$74,999 | 34 |
| \$75,000 - \$99,999 | 21 |
| \$100,000 or more | 23 |
| Mean Income | \$74,500 |
| Ethnicity | |
| White | 88 |
| Black | 6 |
| Other | 6 |

Respondent Profile

| | Respondents % |
|--|------------------|
| Employment Status | |
| Employed full-time | 65 |
| Employed part-time | 9 |
| Other | 26 |
| Education | |
| HS graduate or less | 21 |
| Some college or less/Technical /trade school | 28 |
| Associate degree | 12 |
| Bachelor degree | 24 |
| Post-graduate study / degree | 14 |
| Other | 2 |

Myrtle Beach 2010 Summer Visitor Assessment

Congratulations!

Prepared By

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research