



# Myrtle Beach 2009 Travel Planning Study

– Study Results –

February 2009

Prepared By

**Equation**  
research





**Thank you.**

## **A different kind of conversation ...**

**Previous years ...**

**Turn the lights on what's really  
happening out there**

**The inevitable question ...**

**“How do we salvage something out of this year and this economy?”**

## **This study:**

**We set out to find answers to the tough questions and the current trends.**

**Particularly, in light of your budget issues.**

**Context:**

**“The only time a significant change in market share occurs is in a down economy.”**

## Objectives:

- To determine areas where travelers plan to cut back on leisure travel expenses
- To find out if travelers are undecided on 2009 travel plans as well as likelihood to consider the Myrtle Beach area for a future leisure trip
- To measure receptivity to potential incentives designed to increase visitation to the Myrtle Beach area

## Qualification criteria:

- Age 25 – 54
- Live in GA, KY, MD, NJ, NY, OH, PA, TN, or VA
- Have taken at least 1 overnight trip for leisure in the past 2 years
- Be the primary or joint decision-maker when planning for leisure trips or vacations.
- Recent Visitors – 50% have visited MB in the last 2 years
- Prospective Visitors – 50% have visited more than 2 years ago (or never)

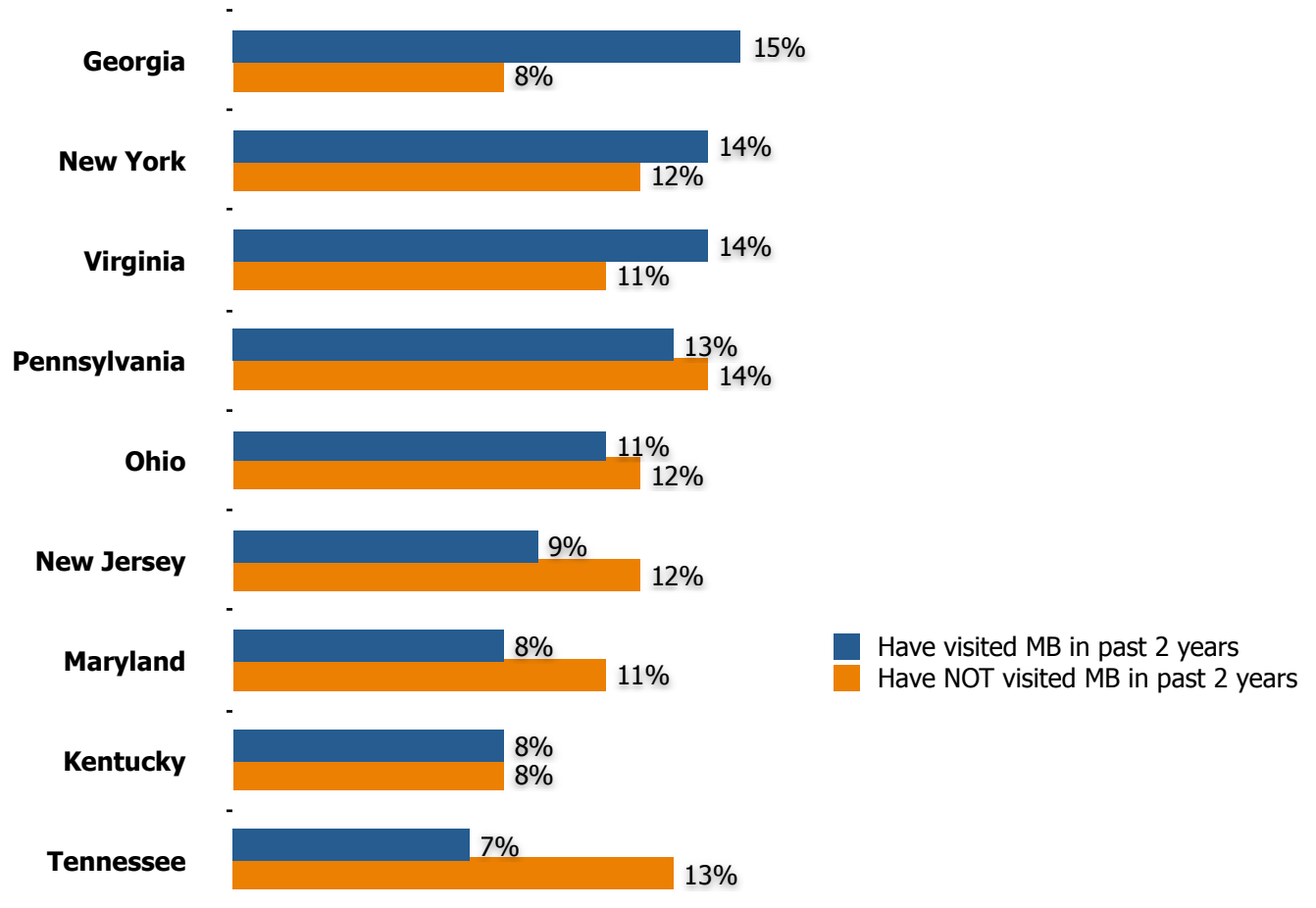
Respondents were surveyed between January 14 – 18, 2009. A total of 806 qualified surveys were received. The margin of error for each quota group is +/- 4.9%.



# **What does our audience look like?**

# Here is where your prospective audience is coming from...

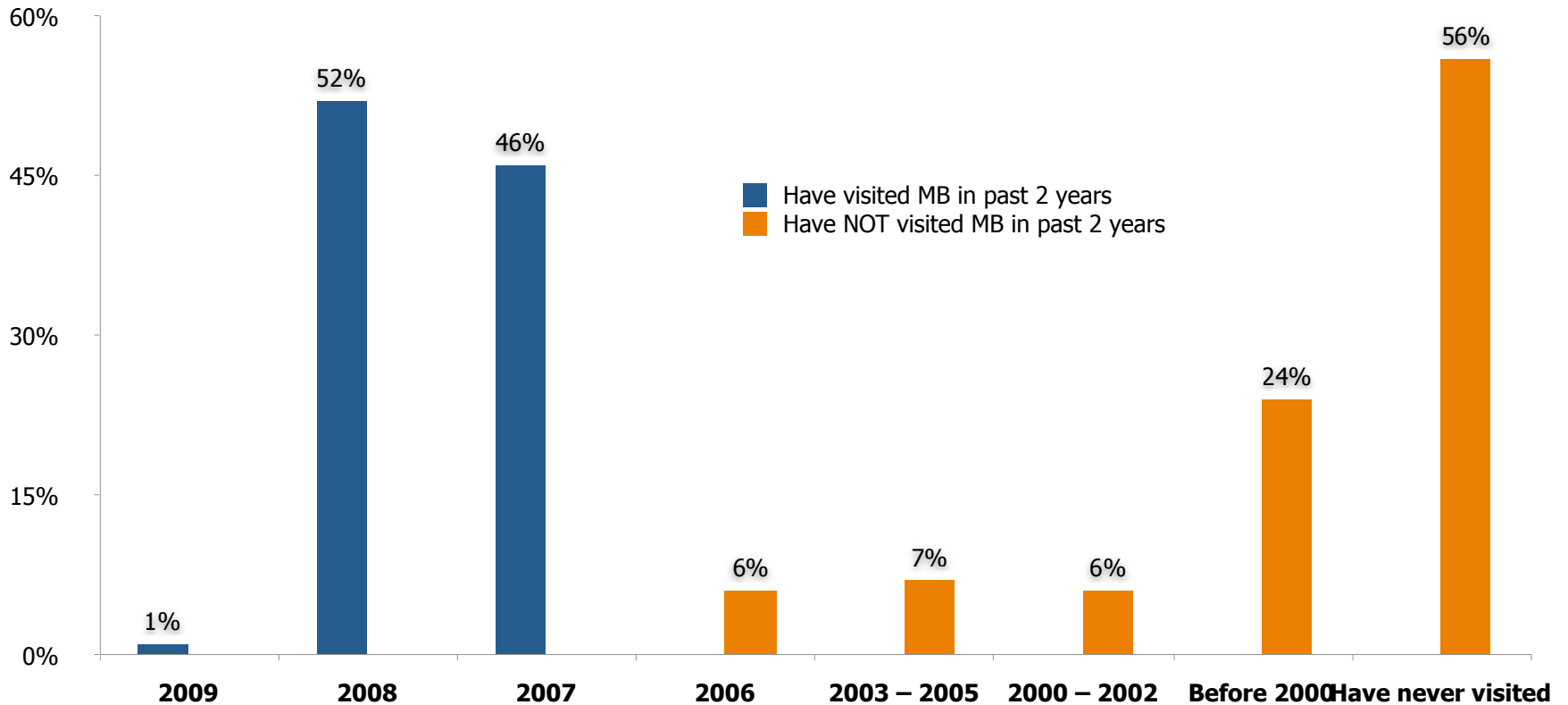
## Place of Origin



Q: In what state are you located?

# The majority of prospective visitors have never been to the Myrtle Beach area before.

## Most Recent Visit to Myrtle Beach Area



Q: When was your most recent visit to the Myrtle Beach area?

## Visitor / Prospect Profile

	<b>Recent Visitors</b> %	<b>Prospects</b> %
<b>Age</b>		
25 – 34	<b>32</b>	<b>40</b>
35 – 44	<b>34</b>	<b>30</b>
45+	<b>34</b>	<b>29</b>
Mean (years)	<b>39.6</b>	<b>38.5</b>
<b>Gender</b>		
Male	<b>52</b>	<b>51</b>
Female	<b>48</b>	<b>49</b>
<b>Involvement in Leisure Travel Planning</b>		
Do most of the planning myself	<b>67</b>	<b>66</b>
Share in the planning	<b>33</b>	<b>34</b>

## Visitor / Prospect Profile

	<b>Recent Visitors %</b>	<b>Prospects %</b>
<b>Marital Status</b>		
Married	<b>66</b>	<b>57</b>
Single	<b>24</b>	<b>32</b>
Separated / Divorced	<b>10</b>	<b>11</b>
<b>Have Children &lt; 18 in Household</b>		
Yes	<b>49</b>	<b>43</b>
<b>Annual Household Income</b>		
Less than \$50,000	<b>24</b>	<b>39</b>
\$50,000 - \$74,999	<b>32</b>	<b>30</b>
\$75,000 - \$99,999	<b>20</b>	<b>16</b>
\$100,000 or more	<b>24</b>	<b>15</b>
Mean (\$000s)	<b>78.9</b>	<b>65.7</b>

## Visitor / Prospect Profile

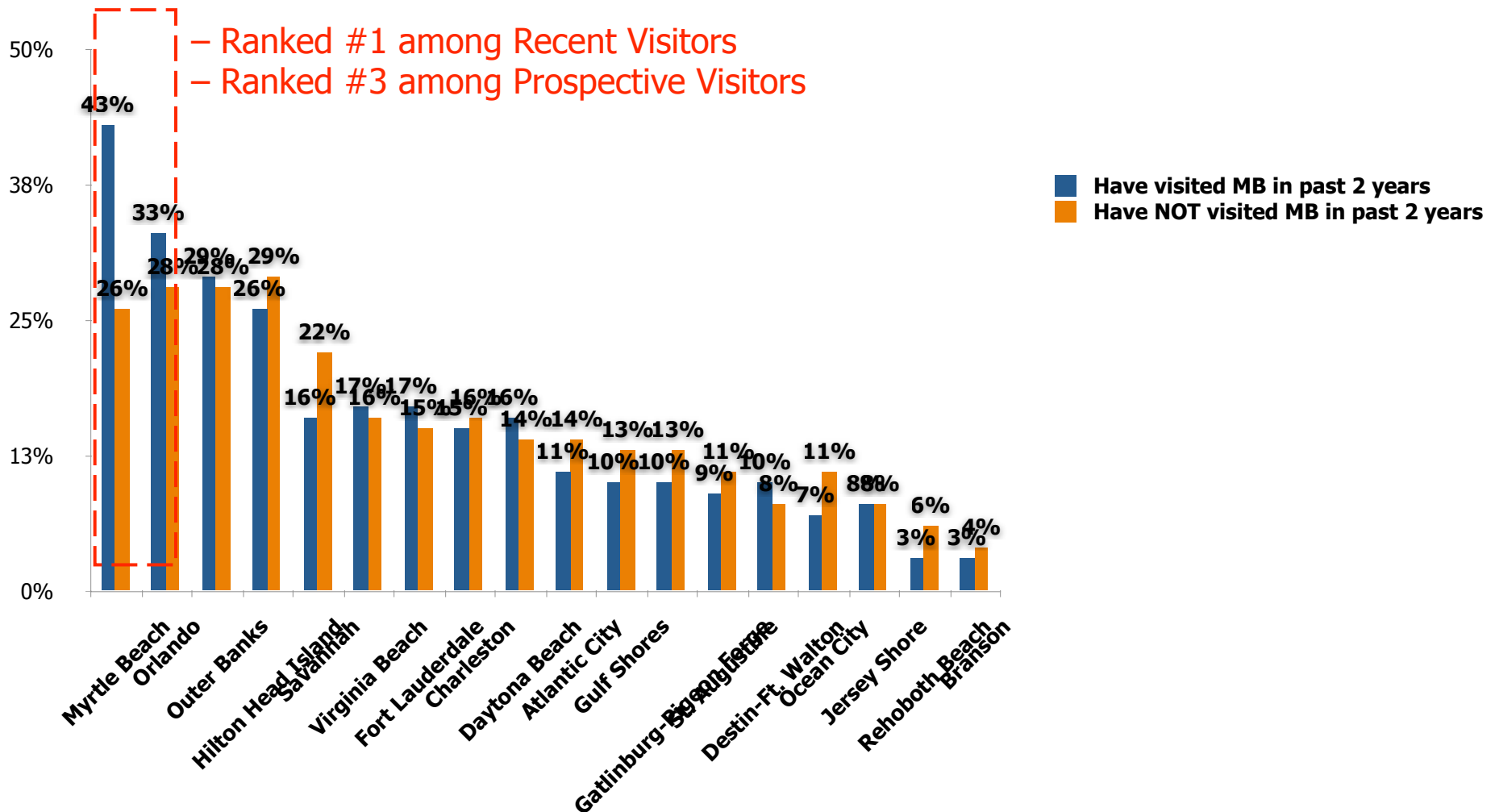
	<b><u>Recent Visitors</u></b> %	<b><u>Prospects</u></b> %
<b>Employment Status</b>		
Employed full-time / part-time	<b>82</b>	<b>78</b>
Full-time homemaker	<b>6</b>	<b>5</b>
Student	<b>4</b>	<b>4</b>
Retired	<b>3</b>	<b>2</b>
Unemployed	<b>2</b>	<b>6</b>
<b>Education</b>		
Some college or less	<b>36</b>	<b>34</b>
Associate degree	<b>12</b>	<b>8</b>
Bachelor degree	<b>28</b>	<b>33</b>
Post-graduate study / degree	<b>24</b>	<b>26</b>



# **How do today's travelers perceive the Myrtle Beach area?**

# Myrtle Beach ranks among the top vacation destinations among past and prospective visitors.

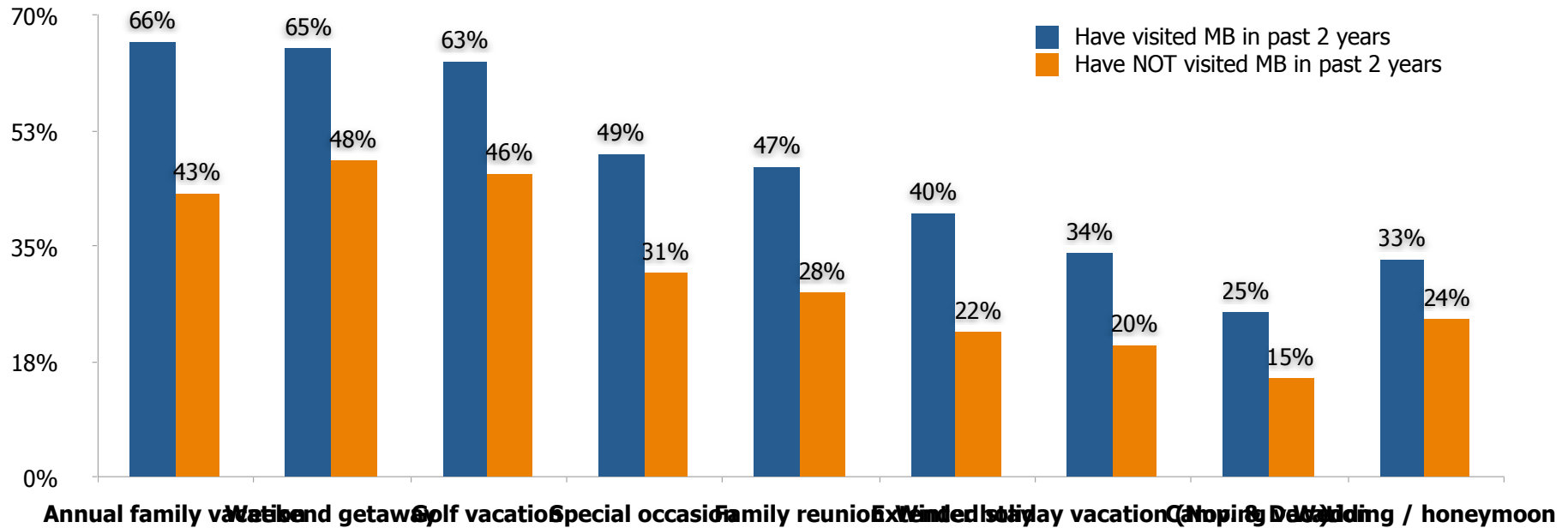
## Top U.S. Vacation Destinations



Q: Which three of the following U.S. vacation destinations would you like to visit most? Please select up to three responses.

# High ratings as a destination for family vacations, weekend getaways and golf outings.

## Vacation Ratings for Myrtle Beach Area (Summary of Excellent / Above Average)



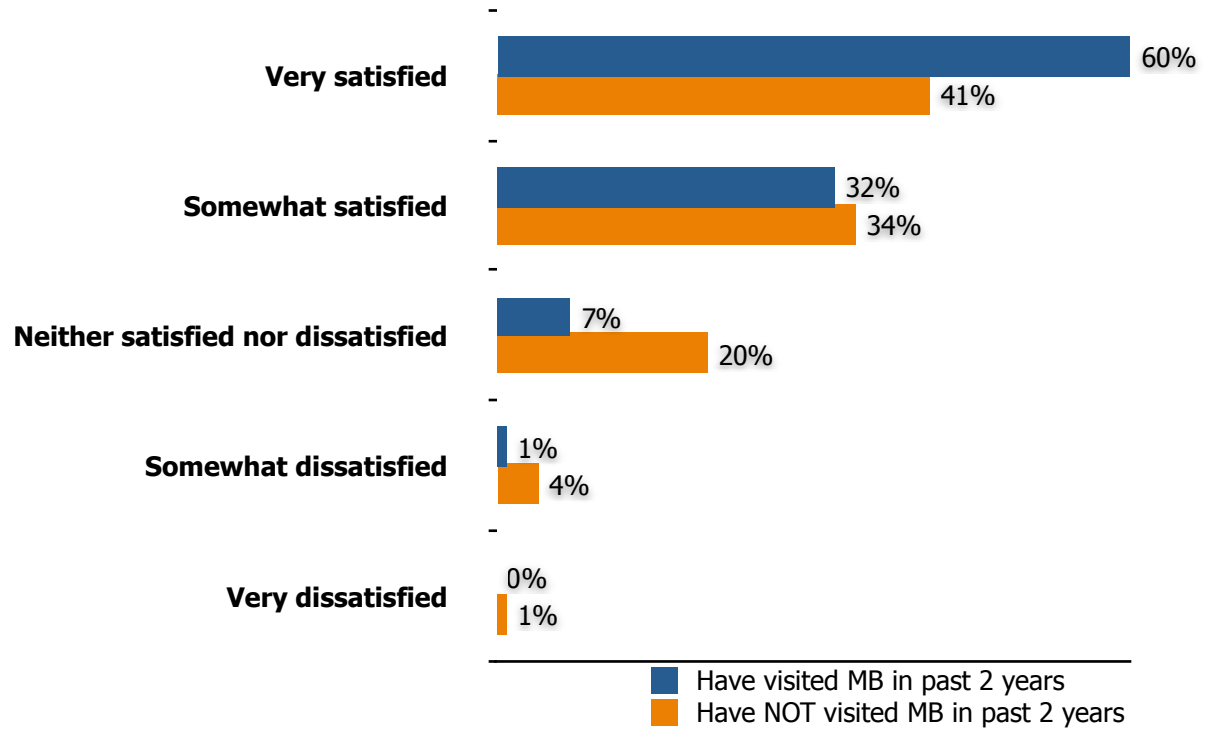
**Q: Based on anything you may have experienced, seen, read or heard, please rate the Myrtle Beach area for the types of vacations listed below:**

## Perceptions of the Myrtle Beach Area

Summary of Agree	Recent Visitors %	Prospects %
Myrtle Beach has clean, sandy beaches	83	52
Traveling to Myrtle Beach is affordable	78	42
Myrtle Beach is an affordable vacation destination	76	45
Myrtle Beach has plenty of activities for children	75	45
Good overall value for the money	74	38
Myrtle Beach is easy to get to when driving	72	47
Generally, it's a little too pricey for me	16	22
In terms of cost, Myrtle Beach is out of my league	10	18

Q: Please rate your level of agreement with the following statements about the Myrtle Beach area:

## Satisfaction with Last Visit

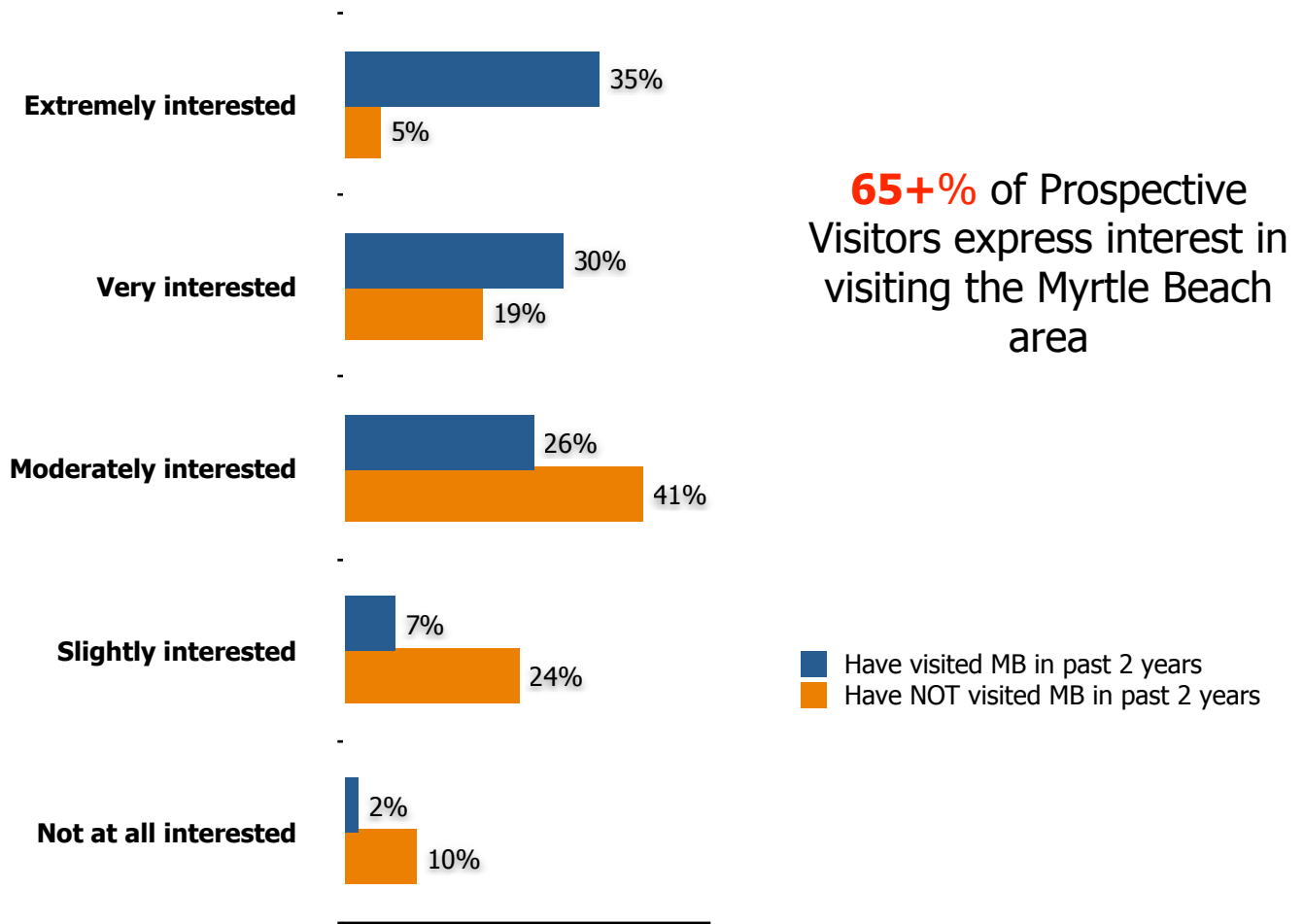


Base: Have ever visited Myrtle Beach area

Q: Overall, how satisfied were you with your most recent visit to the Myrtle Beach area?

# Recent visitors are likely to return, while most prospective visitors are open to a visit.

## Interest in Future Visit



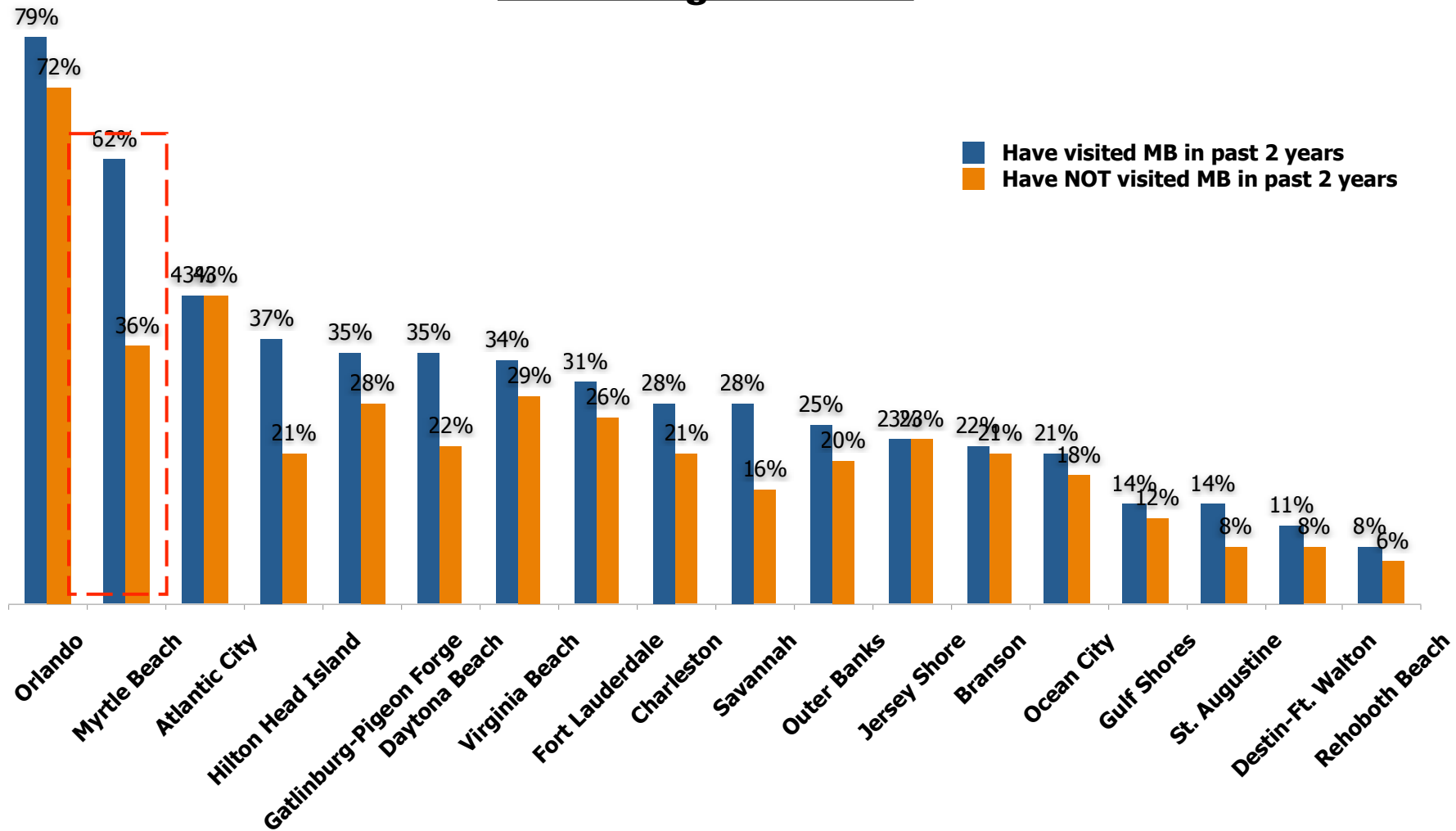
Q: How interested are you in visiting the Myrtle Beach area?



# What about advertising?

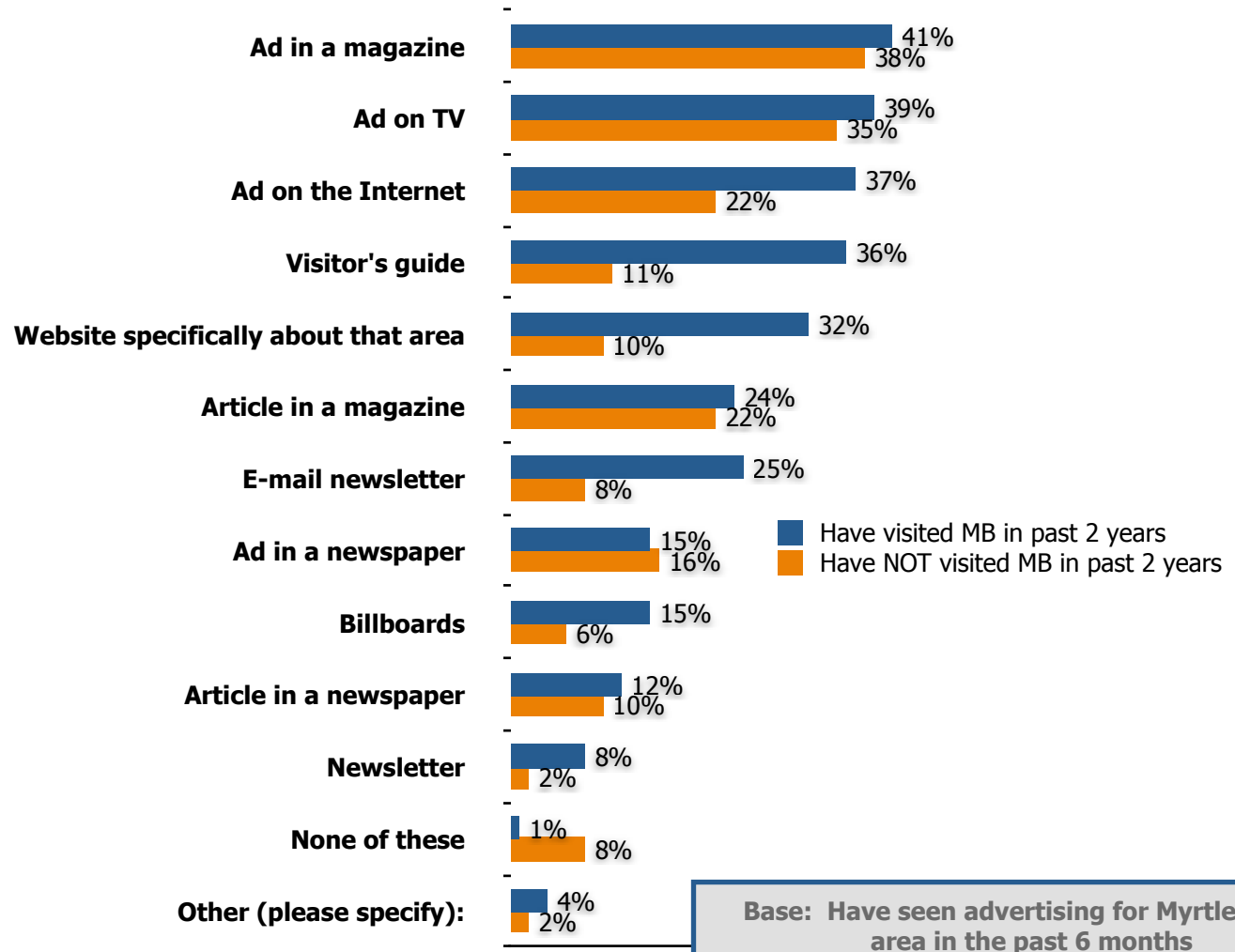
# Myrtle Beach ranks at the top of competitive destinations in terms of advertising awareness.

## Advertising Awareness



Q: In the past 6 months, have you seen any advertising for the following destinations:

## Ad Awareness – Myrtle Beach



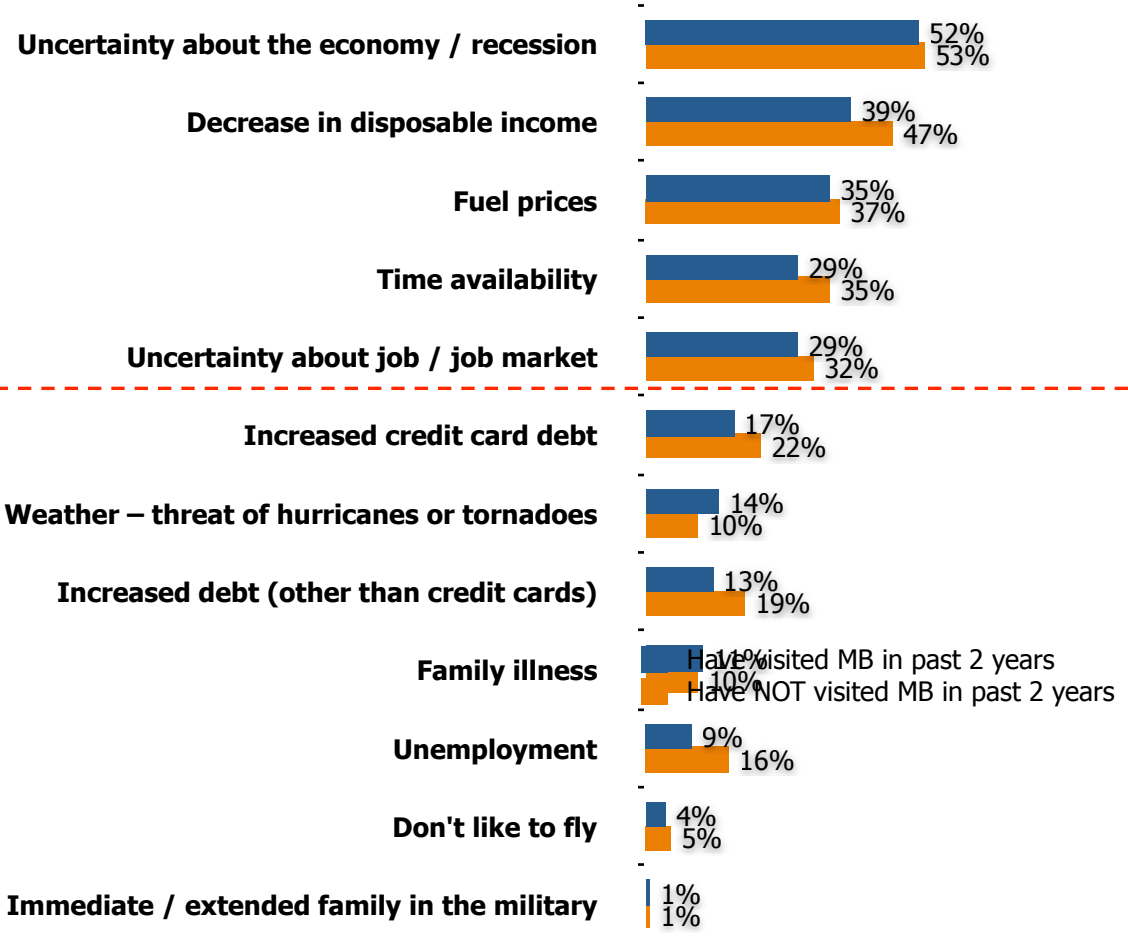
**Q: What, if any, information or ads have you seen about the Myrtle Beach area in the past 6 months? Please select all that apply.**



**What are the challenges facing travelers today when it comes to leisure travel?**

# Economic uncertainty and a drop in disposable income top the list of worries among travelers.

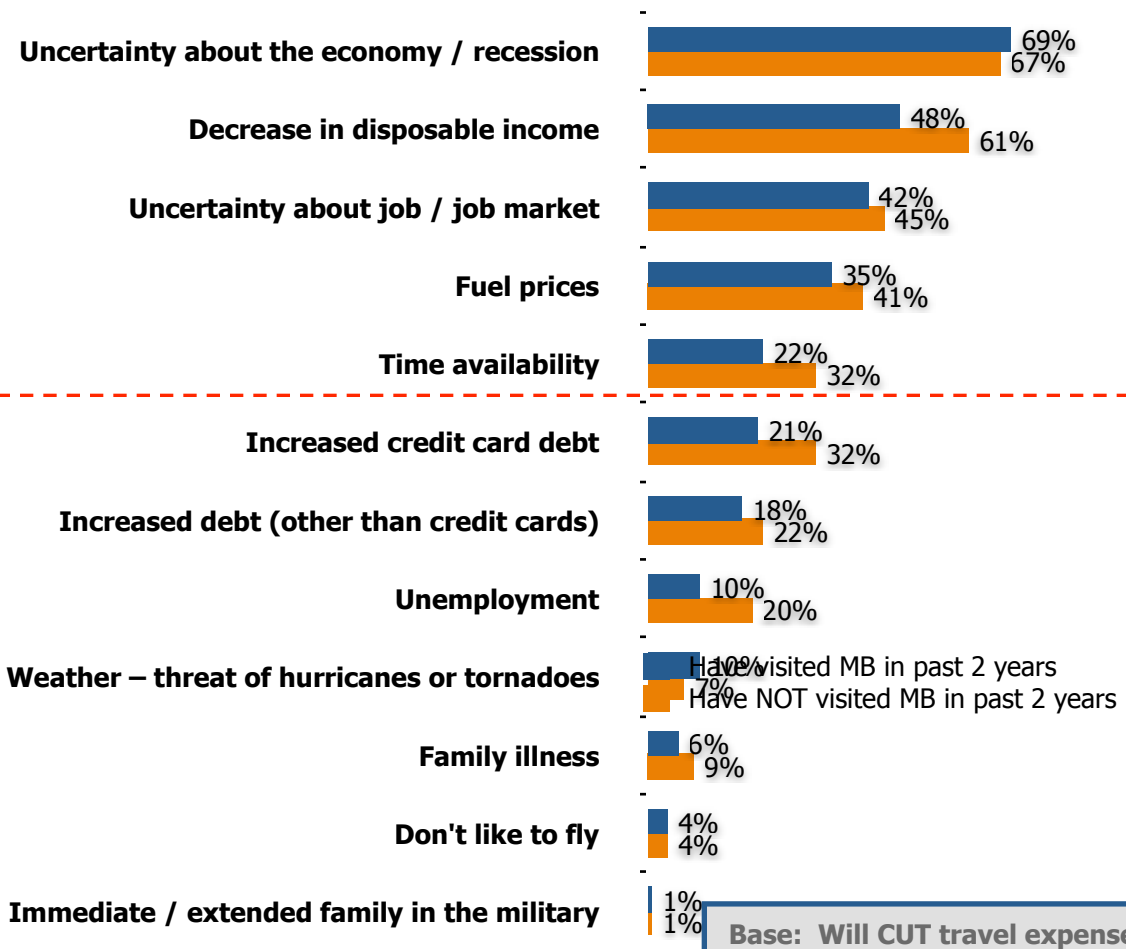
## Negative Factors Influencing Leisure Travel



Q: Which of the following factors, if any, have negatively impacted or might negatively impact your leisure vacation plans in 2009? Please select all that apply.

# The impact of the economic crisis is even more apparent among travelers that are cutting back

## Negative Factors Influencing Leisure Travel (Among Those Cutting Expenses)



Q: Which of the following factors, if any, have negatively impacted or might negatively impact your leisure vacation plans in 2009? Please select all that apply.



**How are leisure travel plans changing as a result of this?**

# Travelers are cutting back – on spending, on travel, and on lodging expenses.

## Impact of Negative Factors Influencing Leisure Travel

Travelers are cutting back primarily in these three areas . . .

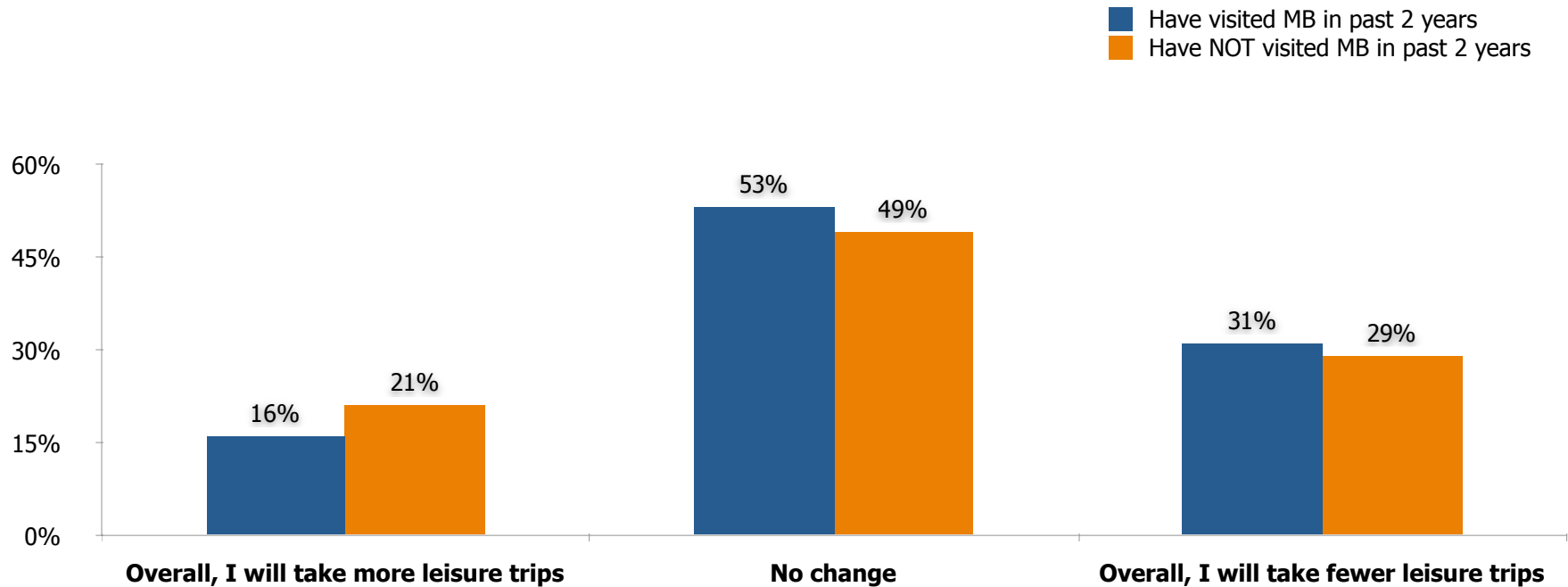


Top Responses Shown	Recent Visitors %	Prospects %
<b>Cut Back on Spending During Travel</b>		
Spend less on retail shopping in general	46	46
Spend less on souvenirs	35	39
Visit fewer shows / spend less on entertainment	32	26
Visit fewer attractions/ spend less on attractions	30	26
Eat more meals in the hotel room/ campsite	23	19
<b>Cut Back on Travel</b>		
Vacation closer to home	32	38
Plan fewer trips	32	33
Take a Stay-cation	13	23
<b>Cut Back on Lodging</b>		
Stay at a less expensive hotel	32	35
Stay fewer nights on our leisure trip(s)	27	31
Stay with family members	25	26

Q: What, if any, impact do you think these factors will have on your vacation/leisure travel in the next 12 months? Please select all that apply.

# 3 in 10 travelers plan to take fewer leisure trips compared to last year.

## Change in 2009 Travel Plans

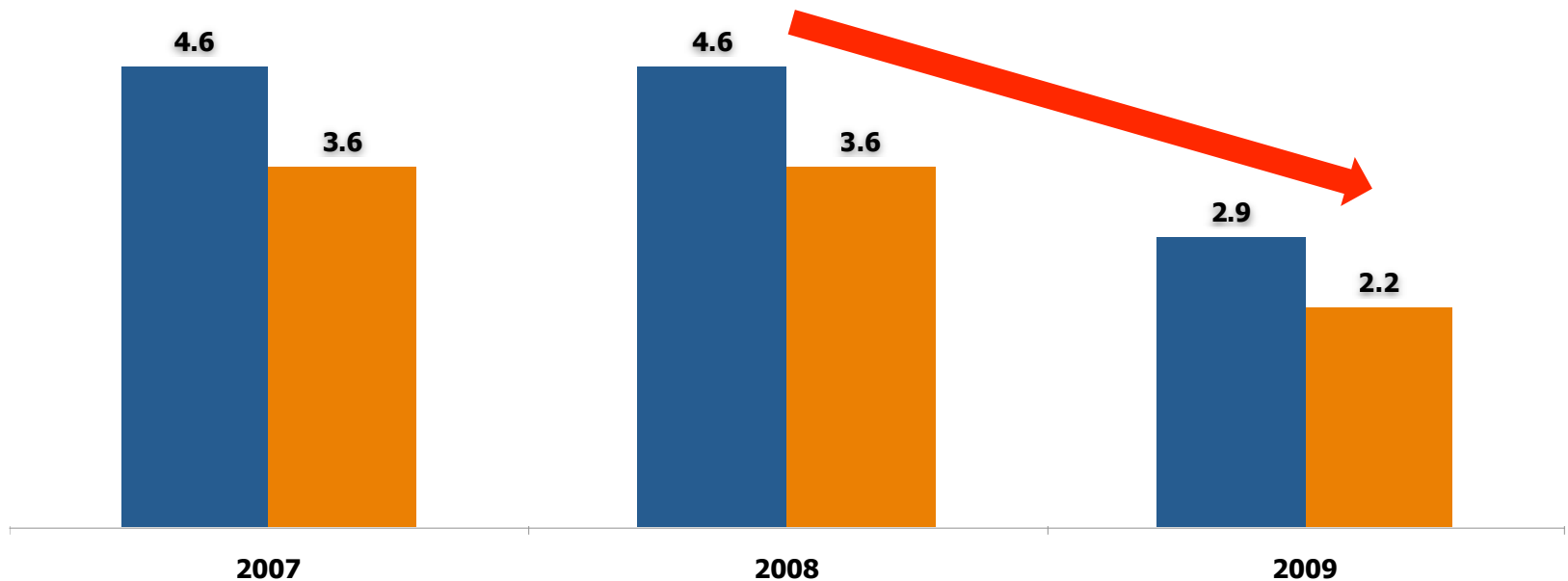


Q: How will your travel plans change in 2009, as compared to 2008?

# The results are clear – travelers are cutting back on their leisure travel compared to previous

## # of Leisure Trips Taken / Planned

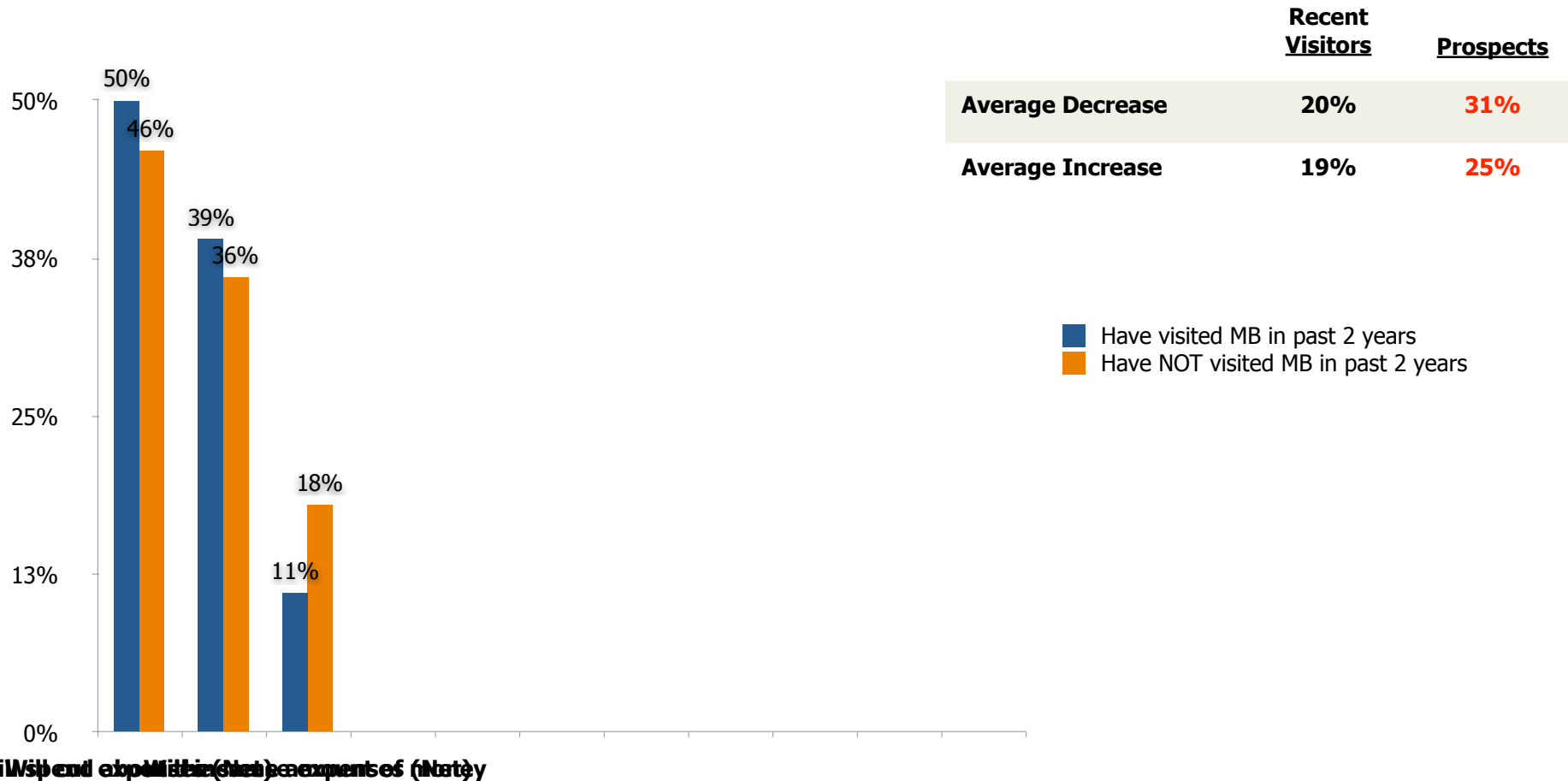
■ Have visited MB in past 2 years  
■ Have NOT visited MB in past 2 years



Q: How many vacation or leisure trips that include at least one overnight stay do you have planned for this year (2009)? How many overnight trips have you taken for leisure in each of the following years...?

# Many also plan to cut back on leisure travel spending in 2009, especially prospective visitors.

## Change in 2009 Leisure Travel Spending



**Q: When considering the money you will spend on leisure travel in 2009, as compared to 2008, please select the answer that best applies:**

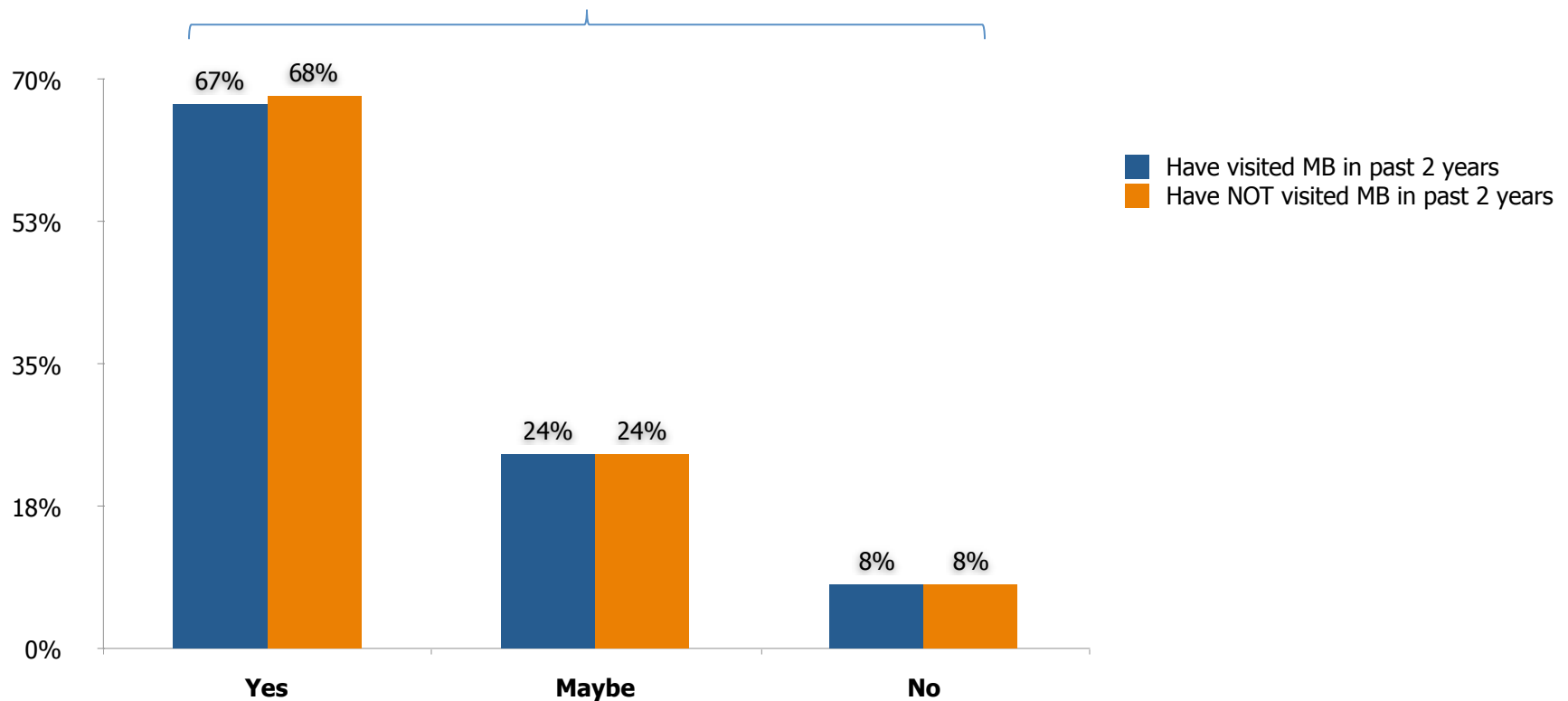


# **What does this mean for the Myrtle Beach area?**

# 9 in 10 travelers are open to a new destination ... Good news or bad news for Myrtle Beach???

## Would Consider a Different Travel Destination

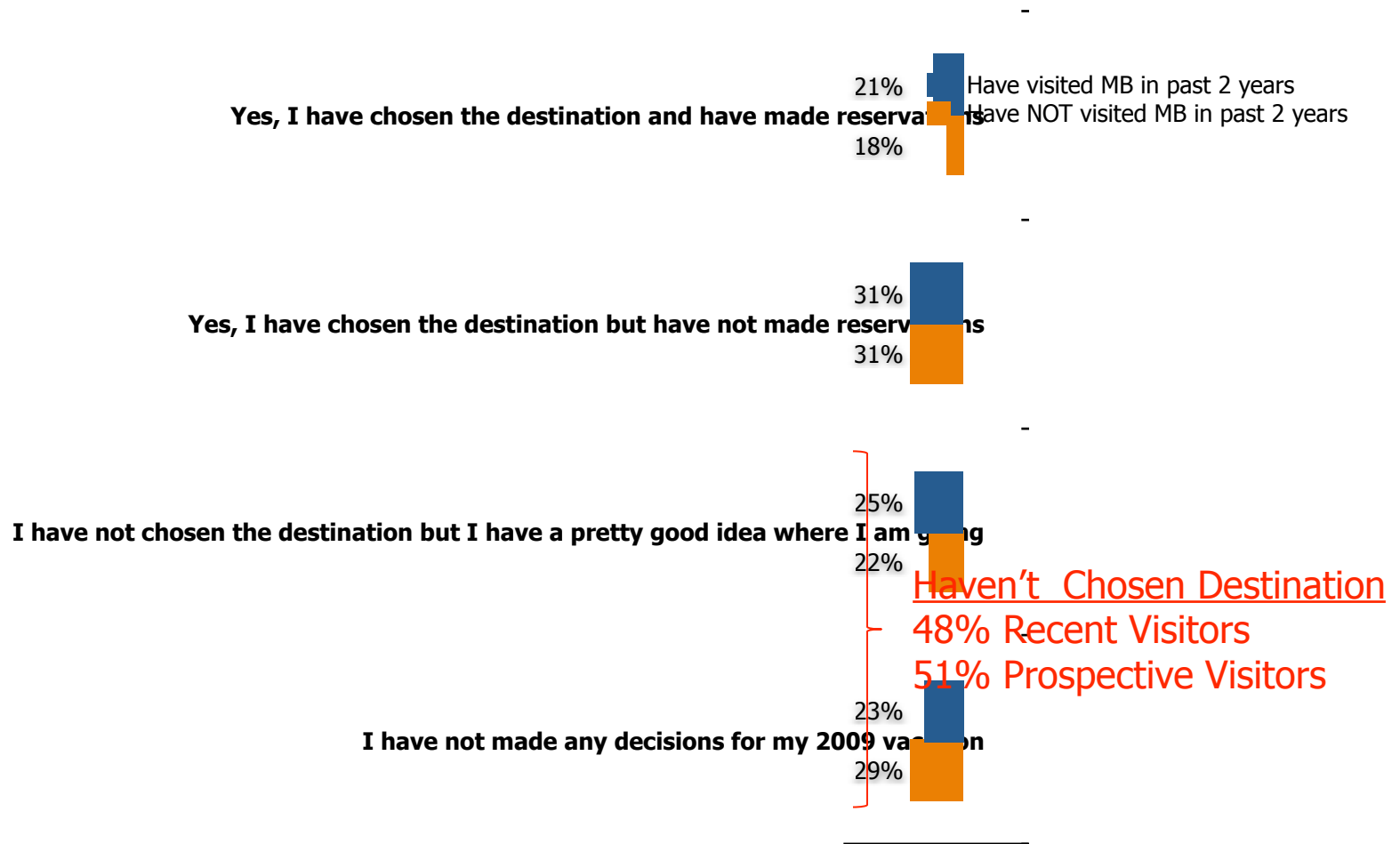
Travelers express a willingness to try something different!



Q: Will you consider visiting a different destination in 2009 than you visited in 2008?

# Half of travelers have yet to chose a destination for 2009 – huge hesitancy!

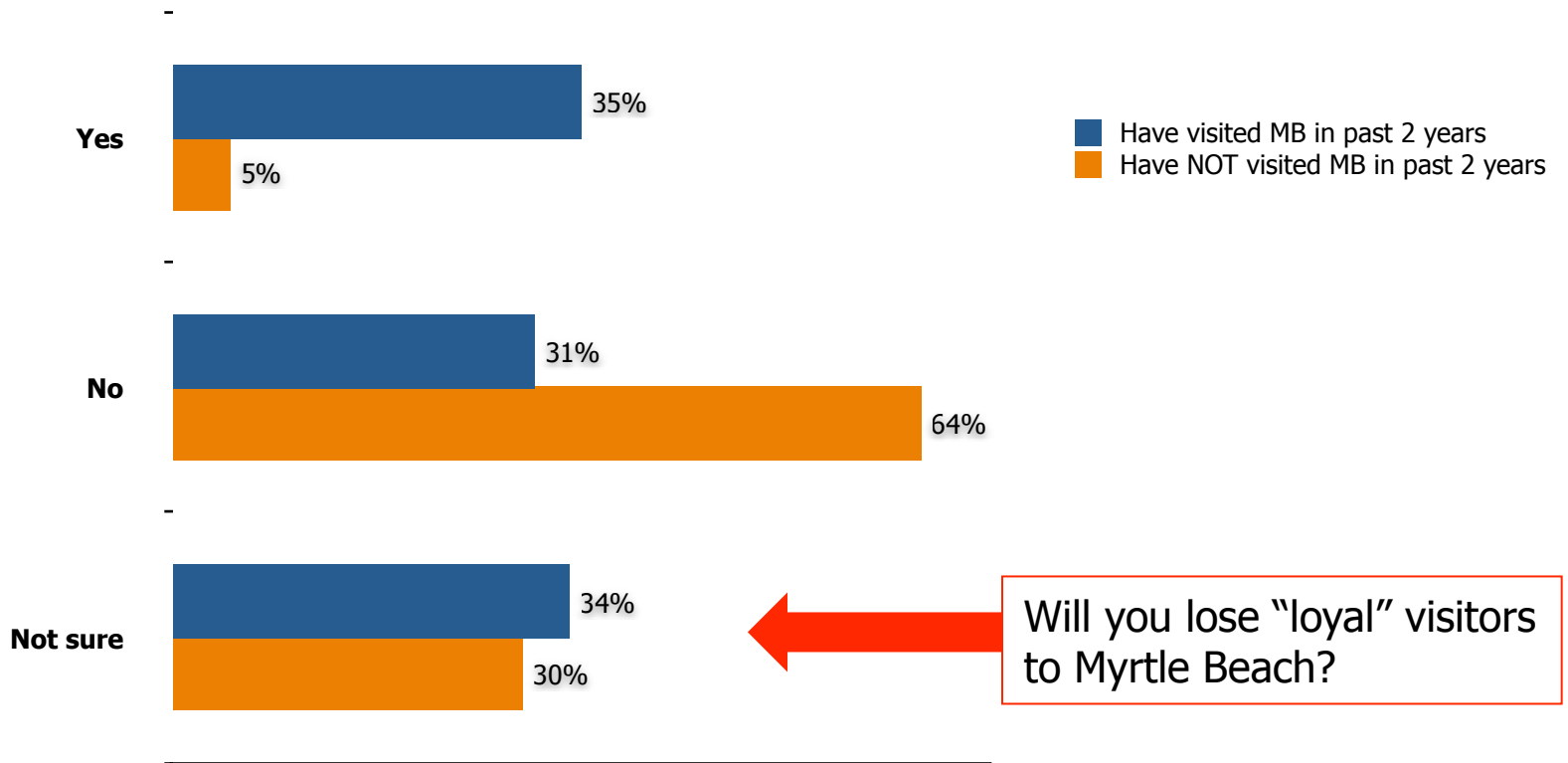
## Have Made Vacation Plans for 2009



Q: Have you made any vacation plans for 2009?

# 1 in 3 travelers planning a trip in 2009 are undecided about the Myrtle Beach area.

## Planned Leisure Trip(s) Will Include the Myrtle Beach Area



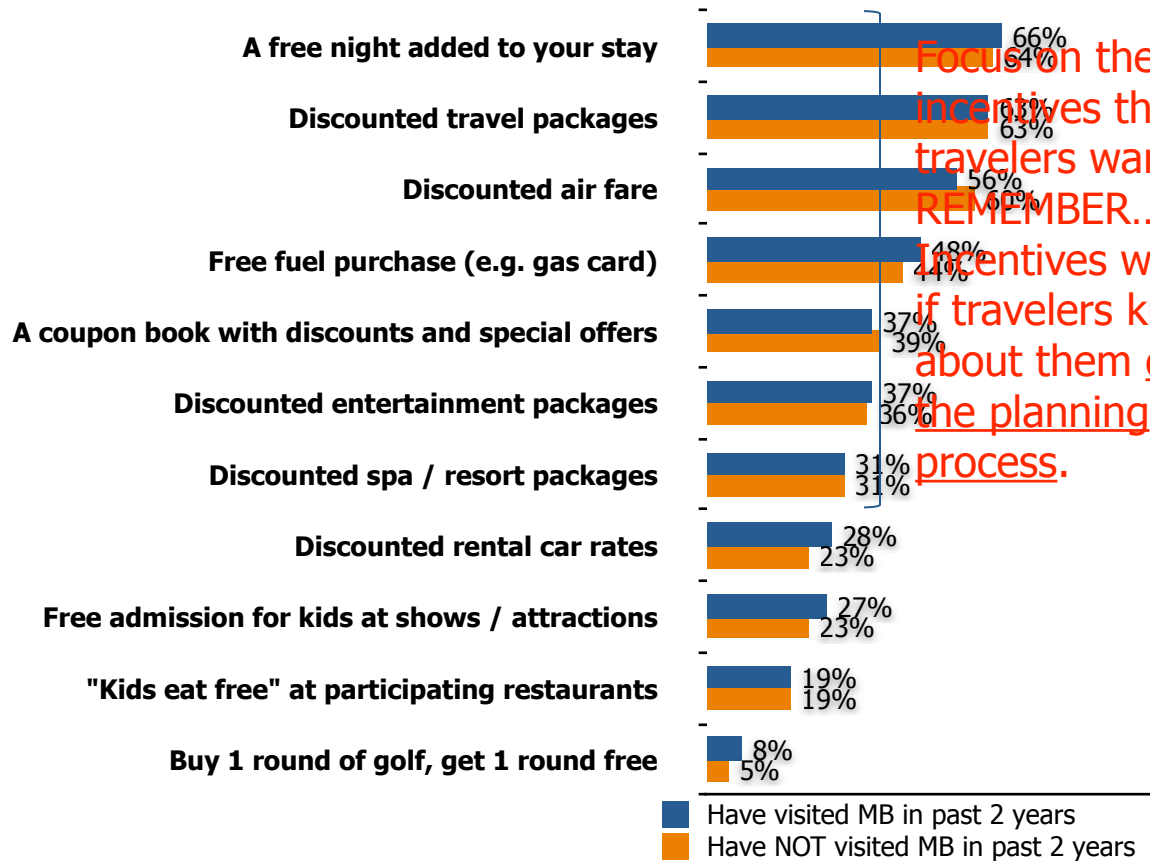
Will you lose "loyal" visitors to Myrtle Beach?

Base: Have vacation or leisure trips planned for 2009

Q: Will any of your vacation or leisure trips with at least one overnight stay that you have planned for this year (2009) be to the Myrtle Beach area?

# With cost being a primary factor, travelers are especially receptive to discounted travel offers and

## Incentives to Increase Likelihood of Consideration

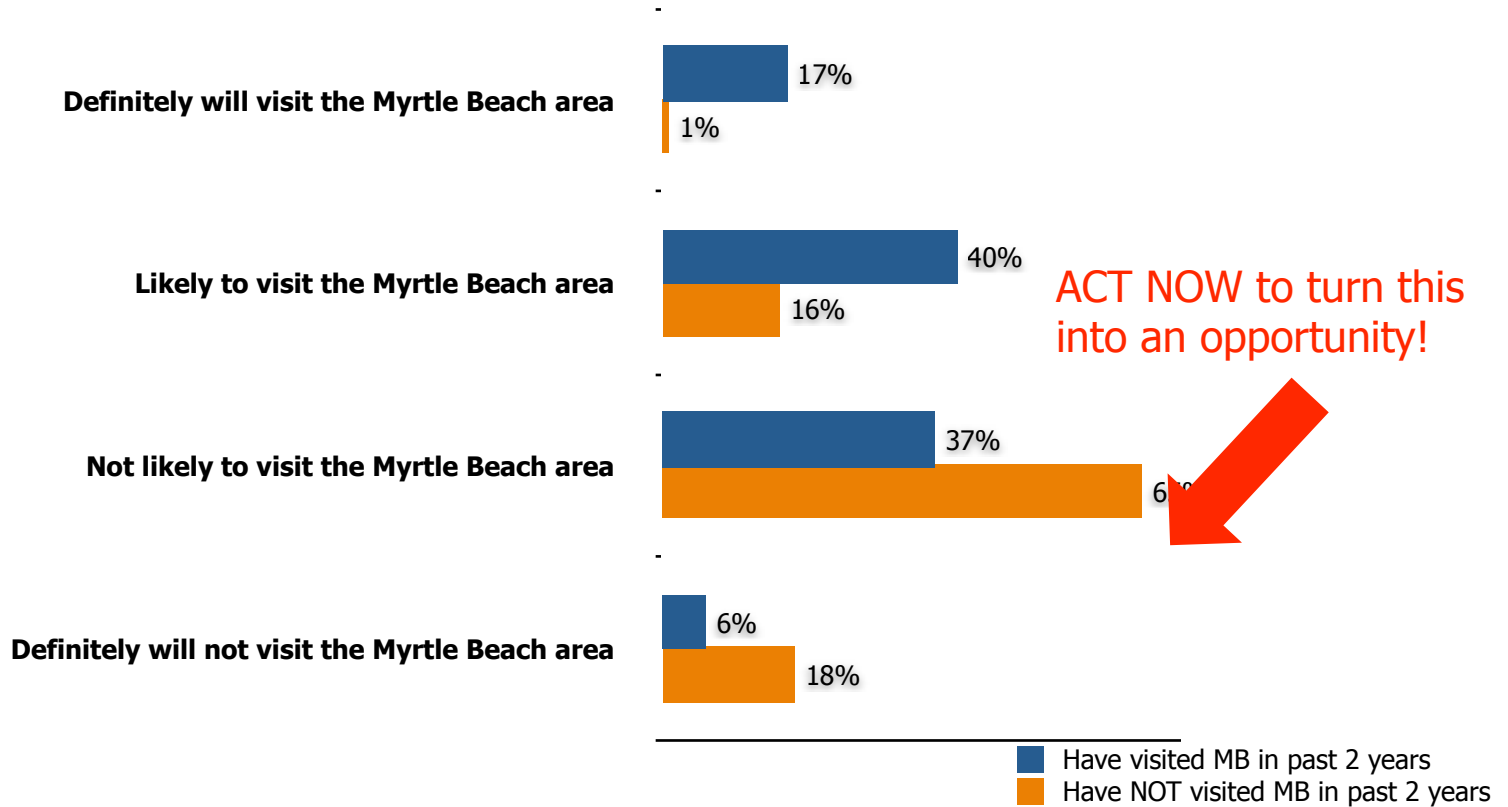


Focus on the incentives that travelers want, but REMEMBER... Incentives work best if travelers know about them during the planning process.

Q: Which of the following travel offers / incentives would increase the likelihood you would choose a particular leisure vacation destination? Please select all that apply.

# Many recent visitors are likely to return, most prospects will need an incentive!

## Likelihood to Visit Myrtle Beach Area in 2009





**Okay, now what?  
Some conclusions ...**

**The question must be:**

**“How do we salvage something out of this year and this economy?”**

**Both recent visitors and prospects are sitting on the fence, waiting ...**

**You've got to force them to PULL THE TRIGGER.**

**Customer loyalty & satisfaction isn't enough.**

**Today, you need to sell them again ... **or lose them.****

**Not enough people know how  
affordable Myrtle Beach is.**

**If you don't  
tell them  
(constantly)  
you'll lose  
them.**

# All the ingredients are in place ...

- **Broad awareness**
- **Growing competitive recognition**
- **Customer loyalty**
- **Strong satisfaction**
- **Affordability**
- **Strong product**
  
- **Powerful promotion**
- **Aggressive pursuit**
- **STRONG OFFERS**

**Look at your advertising success ...**

**If you put money into your advertising, it'll produce results.**

**Be stronger  
more consistent  
more persuasive  
than your  
competitors.**

**Strong,  
powerful,  
unified OFFERS!**

**You simply cannot deliver your strongest sales message **ONCE**, and then wait.**

**You need to pound away at the market –  
break through the **HESITANCY**.**

**If you wait, you lose.**

**With a **REAL** budget and an aggressive message/offer, it can definitely happen.**

**You have 60-90 days!**  
**Invest in yourselves.**



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