

# DESTINATION NEXT

Multi-User Online Diagnostic  
Tool Results:

North Myrtle Beach, SC

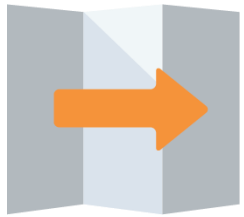
July 5, 2019



# DestinationNEXT

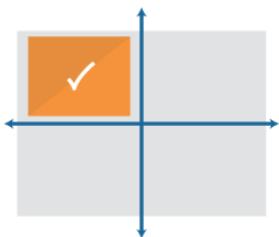
## Vision:

Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world



### Futures Study

- 75 trends & 55 strategies
- 433 respondents in 52 countries



### Scenario Model & Assessment Tool

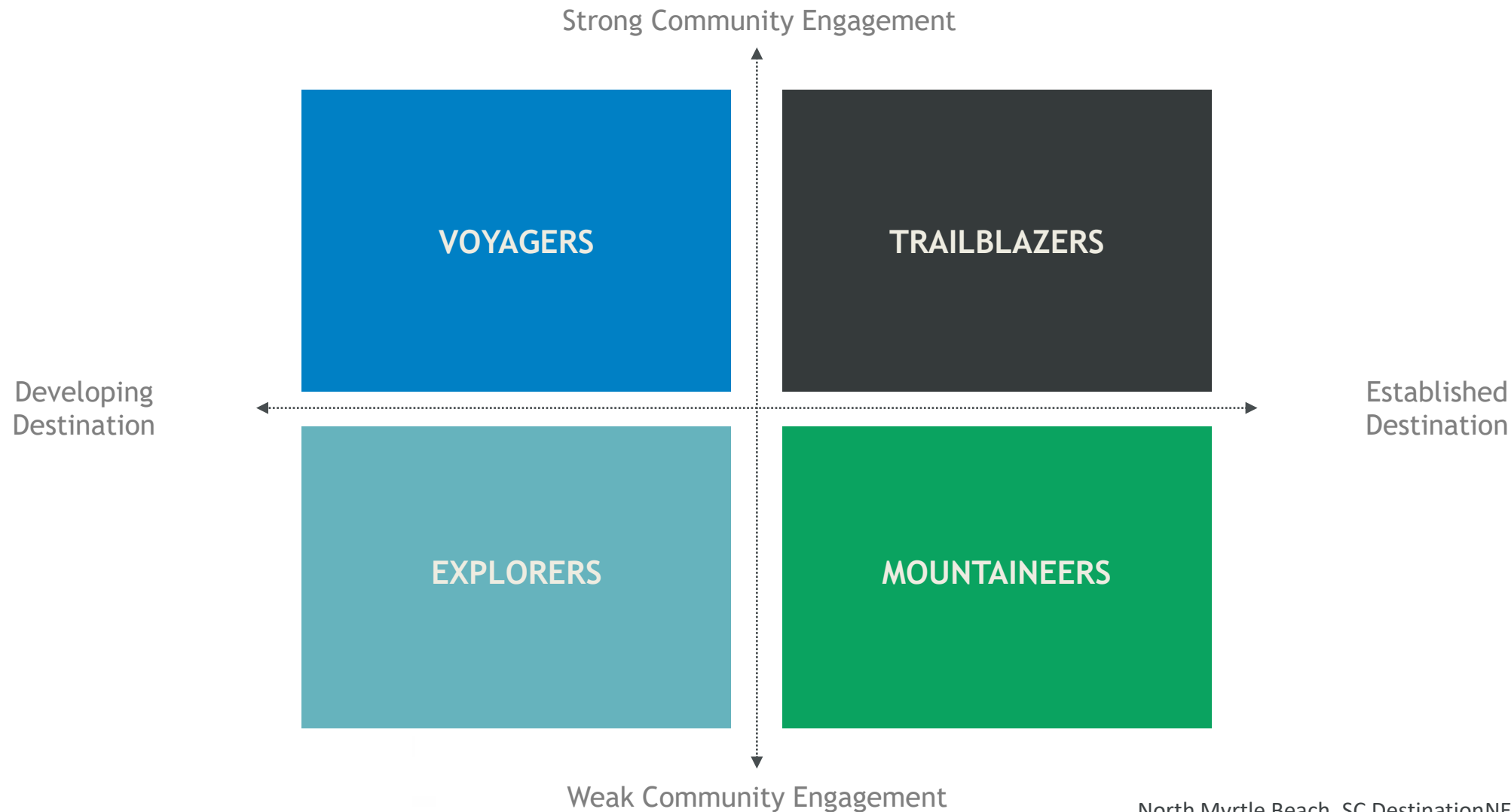
- 4 unique scenarios
- 201 detailed assessments in 11 countries

# SCENARIO MODEL



**DESTINATIONS**  
INTERNATIONAL

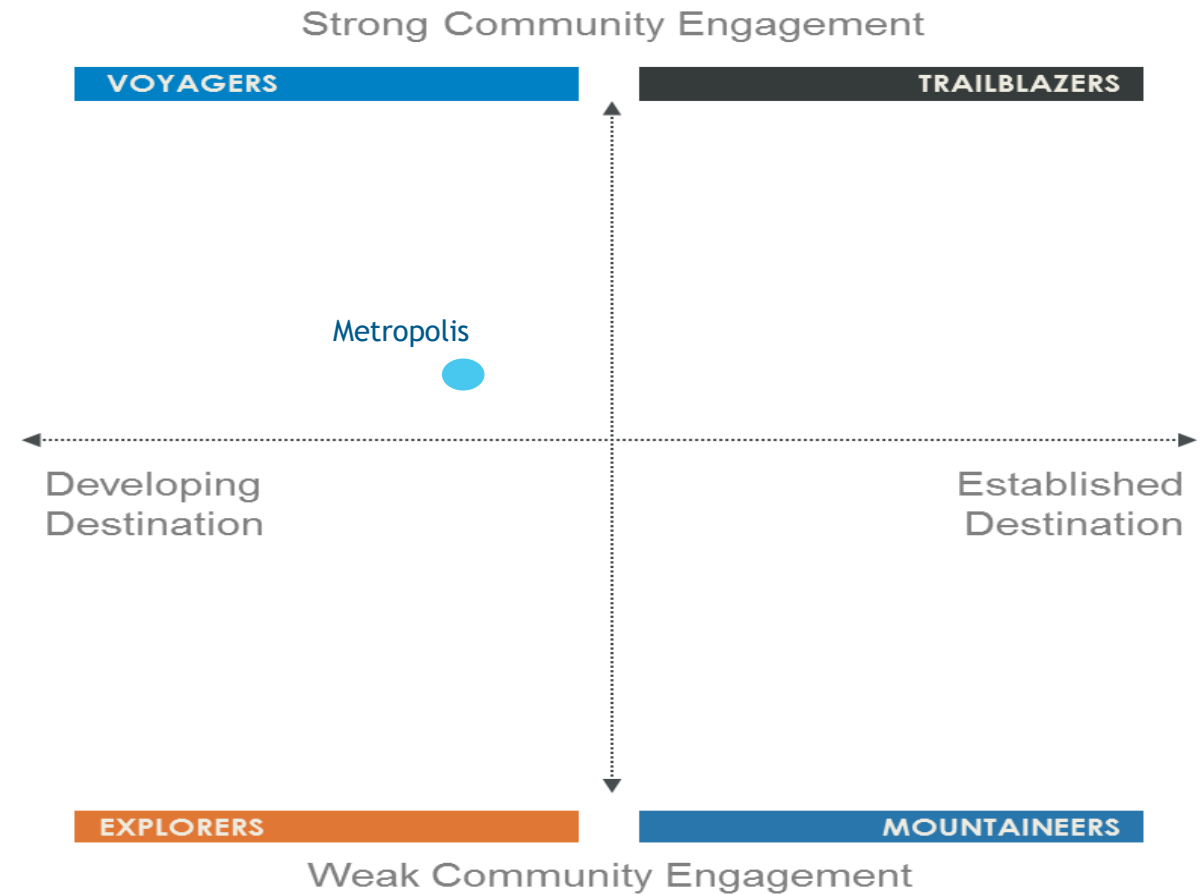
# Scenario Model



# Purpose of Diagnostic Tool

Scenario model intended to be strategic diagnostic tool, not a benchmarking index to rank DMOs, CVBs or destinations

**Objective self-assessment to help identify priorities and strategies for the future**



# Destination Strength Variables



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**

# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



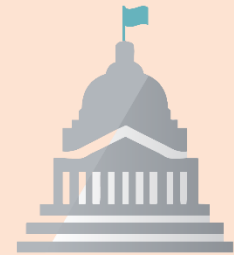
**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



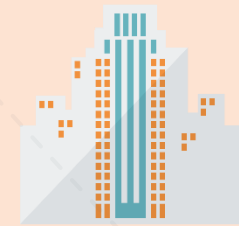
**Hospitality Culture**



**Regional Cooperation**

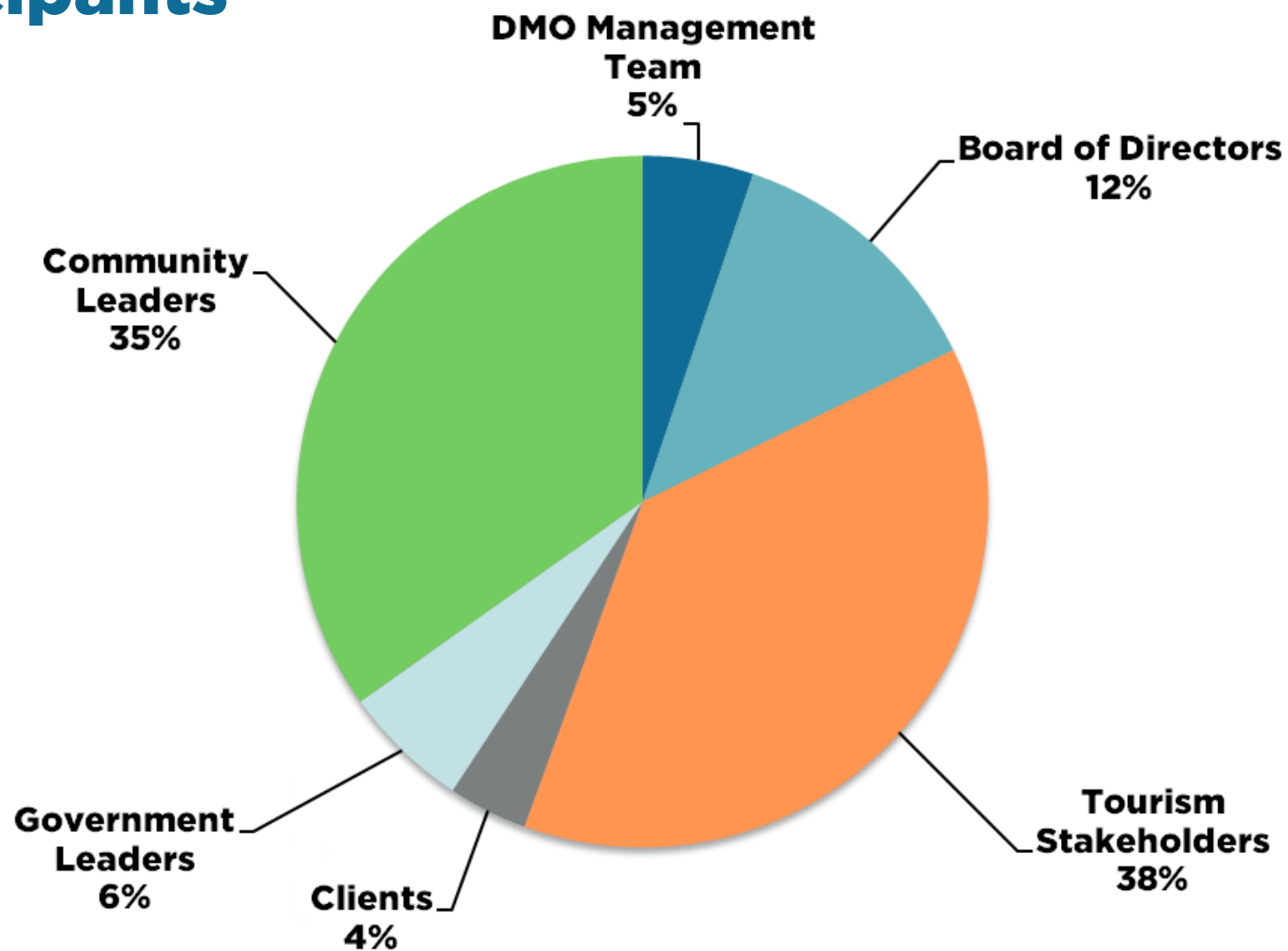


**Funding Support &  
Certainty**



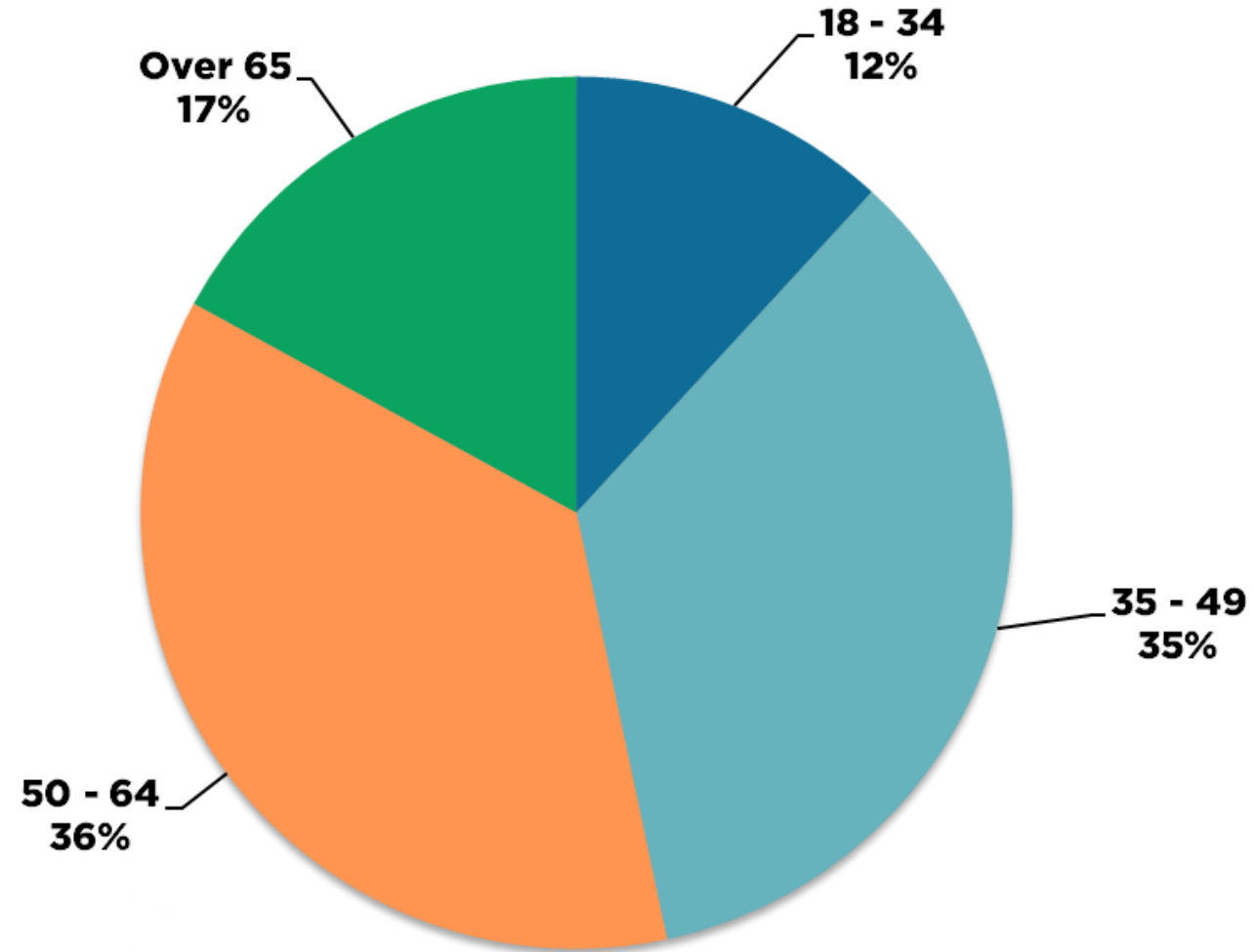
**Economic Development**

# 135 Participants

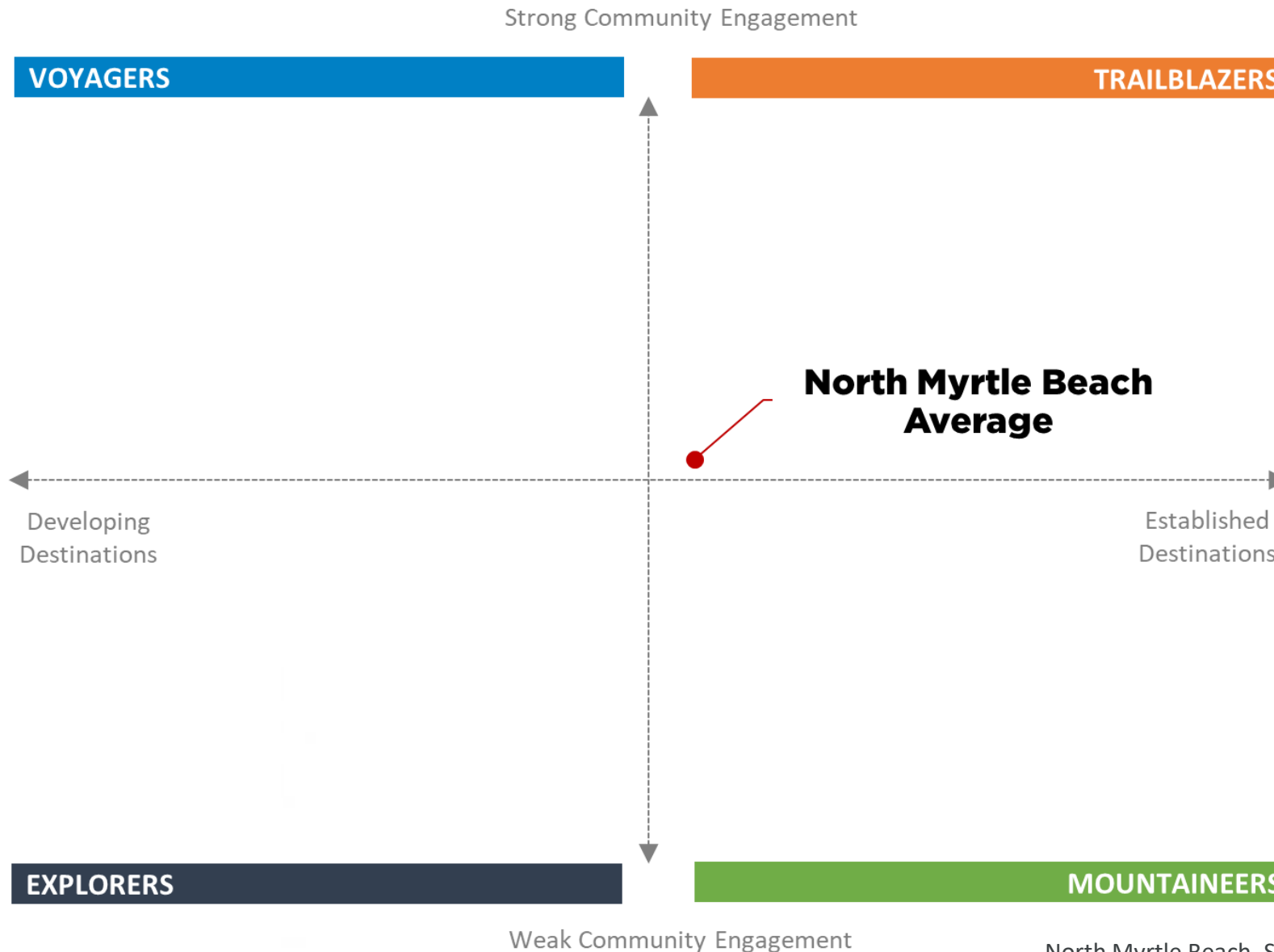




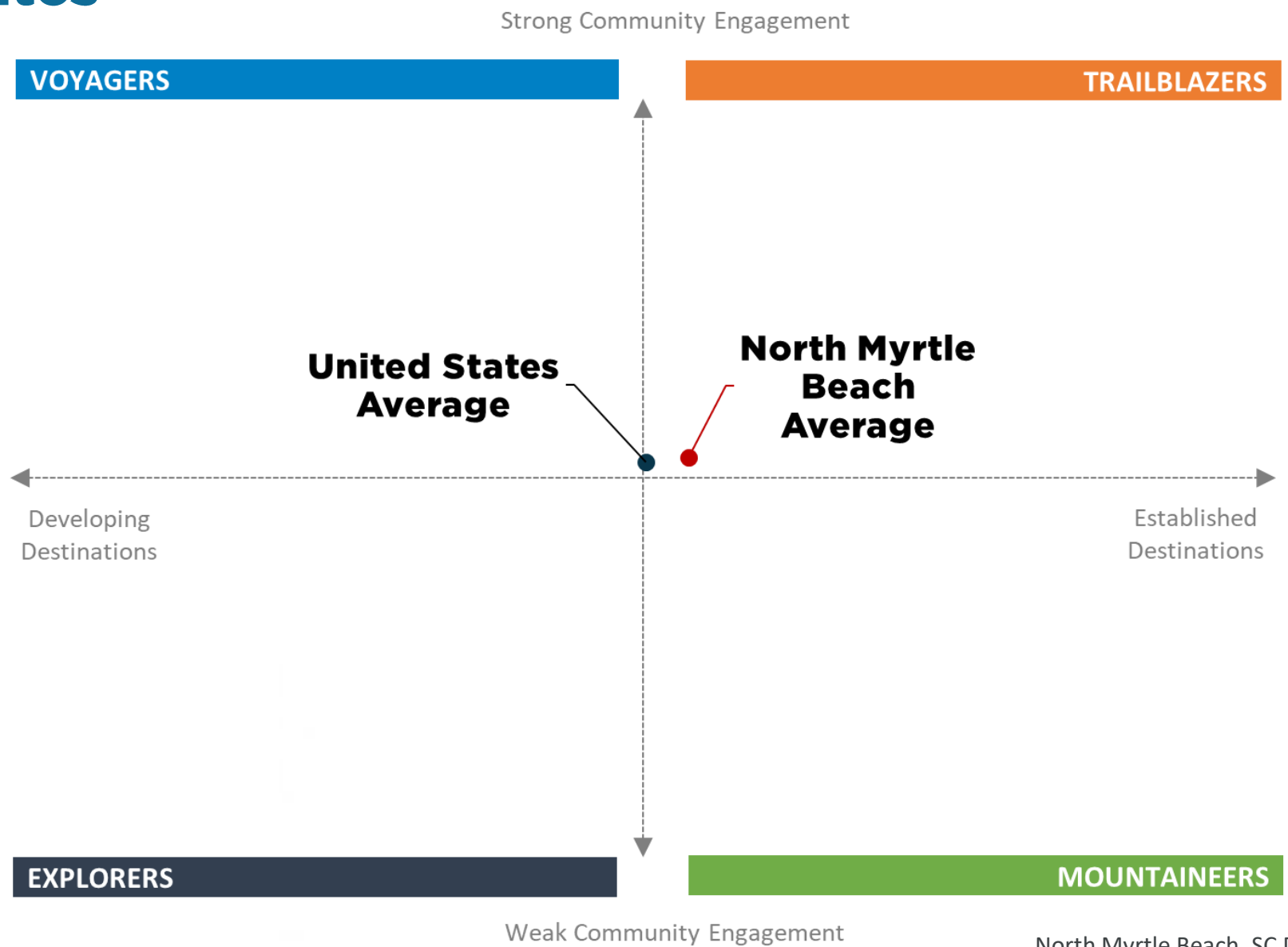
# Age Demographic



# North Myrtle Beach, SC Overall Assessment – Industry



# North Myrtle Beach, SC Overall Assessment – United States



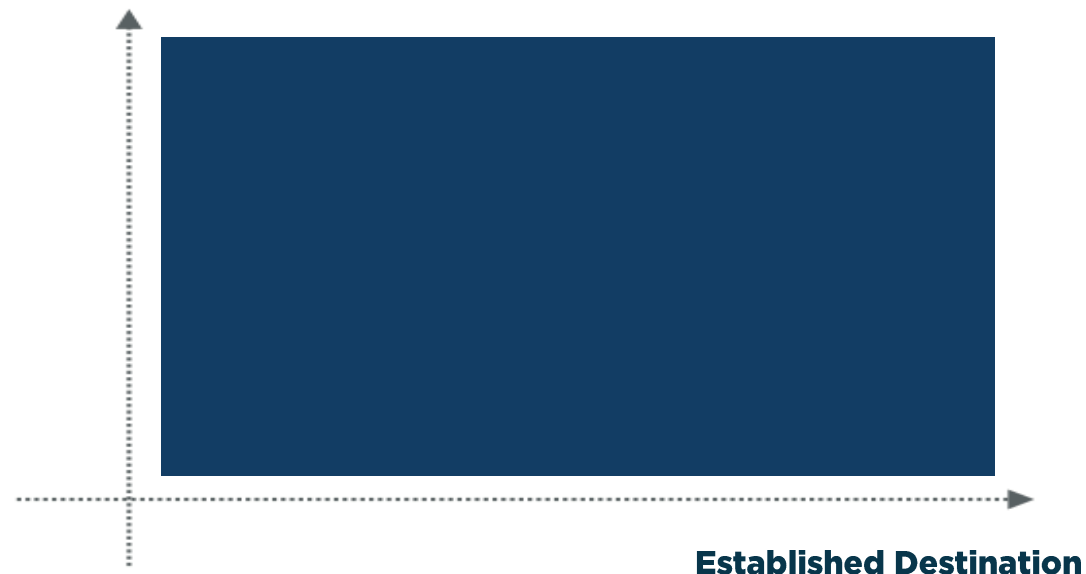
# Trailblazers

**These DMO's and destinations realize the benefits of their tourism vision and work to keep the community and marketplace engagement fresh and relevant.**

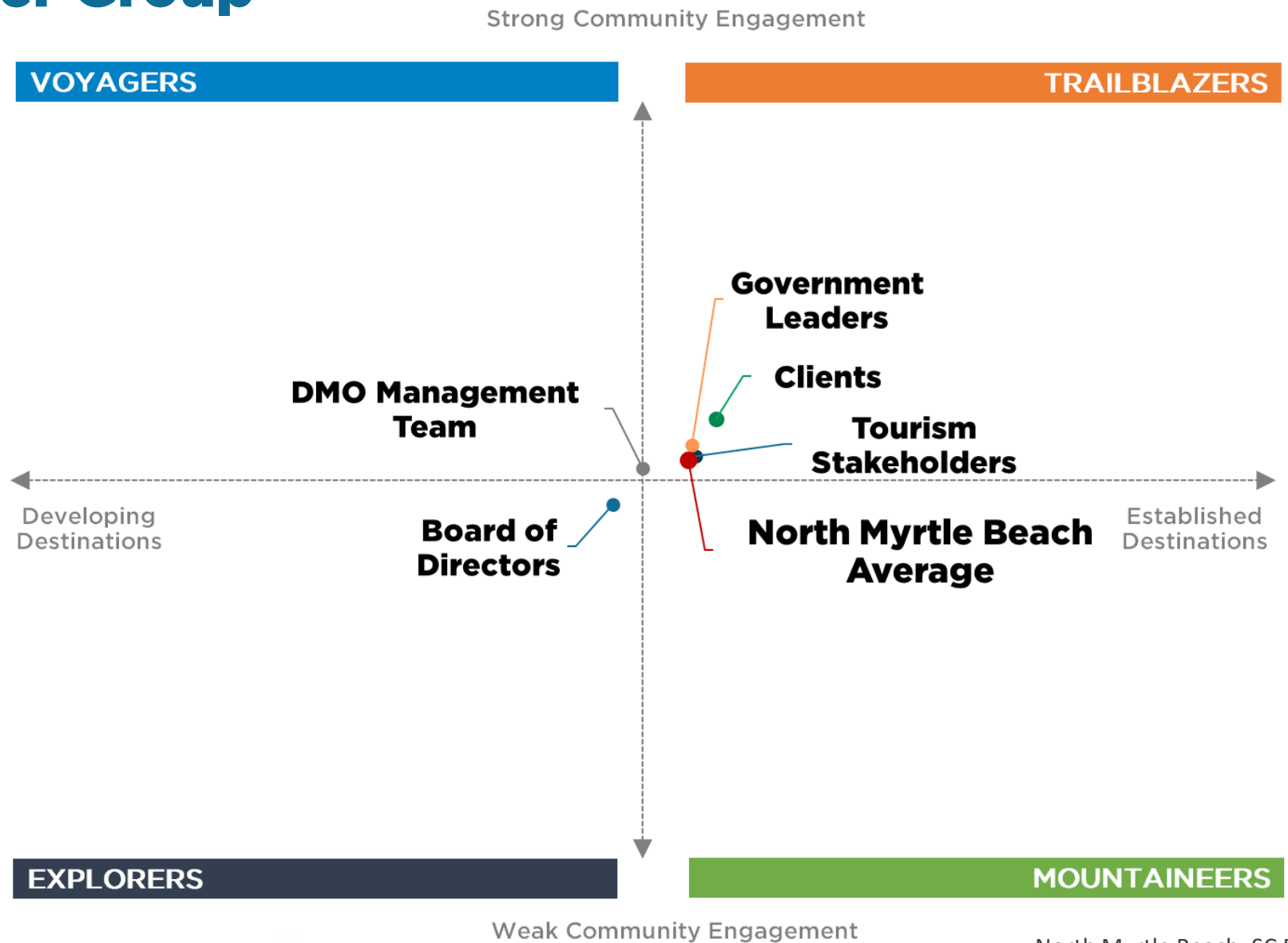
## Key Strategic Challenges

- **Avoiding complacency**
- **Continuing to evolve the destination that delivers a compelling and authentic marketplace experience**
- **Keeping your eye on the ball**

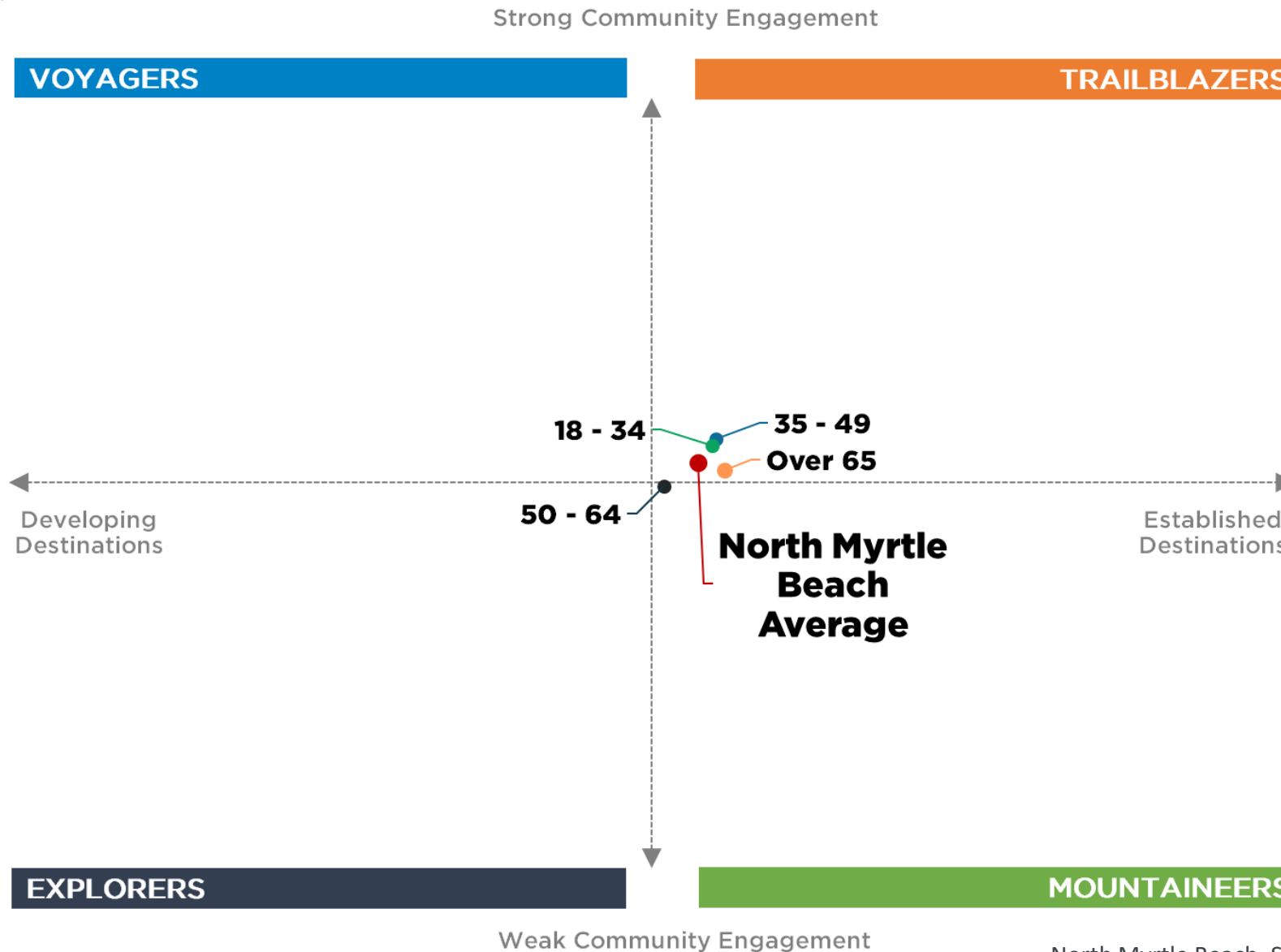
**Strong Community Engagement**



# North Myrtle Beach, SC Overall Assessment – Stakeholder Group



# North Myrtle Beach, SC Overall Assessment - Age Group



# Destination Strength Variables



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**

# Destination Strength Rankings – North Myrtle Beach, SC



## Relative Importance

## Perceived Performance



Brand

1<sup>st</sup>

3<sup>rd</sup>



Destination Performance

2<sup>nd</sup>

2<sup>nd</sup>



Attractions & Entertainment

3<sup>rd</sup>

6<sup>th</sup>



Accommodation

4<sup>th</sup>

1<sup>st</sup>



# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)			
	Industry Average	North Myrtle Beach Average	Standard Deviation	Industry Average	North Myrtle Beach Average	Standard Deviation	
Brand	10.4%	10.9%	0%	3.46	3.74	0.56	3
Destination Performance	10.0%	10.7%	1%	3.74	3.78	0.54	2
Attractions & Entertainment	10.8%	10.7%	0%	3.60	3.61	0.64	6
Accommodation	10.5%	10.3%	1%	3.47	4.07	0.65	1
Mobility & Access	10.1%	10.1%	1%	3.02	2.70	0.62	9
Communication & Internet Infrastructure	10.0%	10.0%	1%	3.23	3.49	0.61	8
Outdoor Recreation & Sports Facilities	9.5%	9.6%	1%	3.19	3.58	0.51	7
Events	9.8%	9.5%	1%	3.55	3.64	0.59	4
Air Access	9.1%	9.1%	1%	3.10	3.63	0.70	5
Convention & Meeting Facilities	9.8%	9.0%	1%	3.07	2.68	0.86	10

DESTINATION STRENGTH - North Myrtle Beach	3.50
INDUSTRY AVERAGE DESTINATION STRENGTH	3.36

RESULTING SCENARIO TRAILBLAZERS

## Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

# Destination Strength – Stakeholder Report Card

Variable	North Myrtle Beach Average	Perceived Performance (1-5 scale)					
		DMO Management Team	Board of Directors	Tourism Stakeholders	Clients	Government Leaders	Community Leaders
3 Brand	3.74	3.75	3.65	3.70	3.79	3.91	3.78
2 Destination Performance	3.78	3.77	3.42	3.78	4.08	3.85	3.86
6 Attractions & Entertainment	3.61	3.47	3.44	3.65	3.79	3.65	3.63
1 Accommodation	4.07	3.47	3.99	4.16	3.82	4.18	4.10
9 Mobility & Access	2.70	2.49	2.36	2.78	2.99	2.72	2.72
8 Communication & Internet	3.49	3.68	3.08	3.48	3.51	3.56	3.60
7 Outdoor Recreation & Sports Facilities	3.58	3.78	3.37	3.54	3.67	3.49	3.68
4 Events	3.64	3.45	3.35	3.63	3.83	3.71	3.74
5 Air Access	3.63	3.52	3.66	3.58	3.79	3.60	3.69
10 Convention & Meeting Facilities	2.68	2.10	2.17	2.85	2.52	2.29	2.86
DESTINATION STRENGTH - North Myrtle Beach							3.50
INDUSTRY AVERAGE DESTINATION STRENGTH							3.36

RESULTING SCENARIO TRAILBLAZERS

## Note

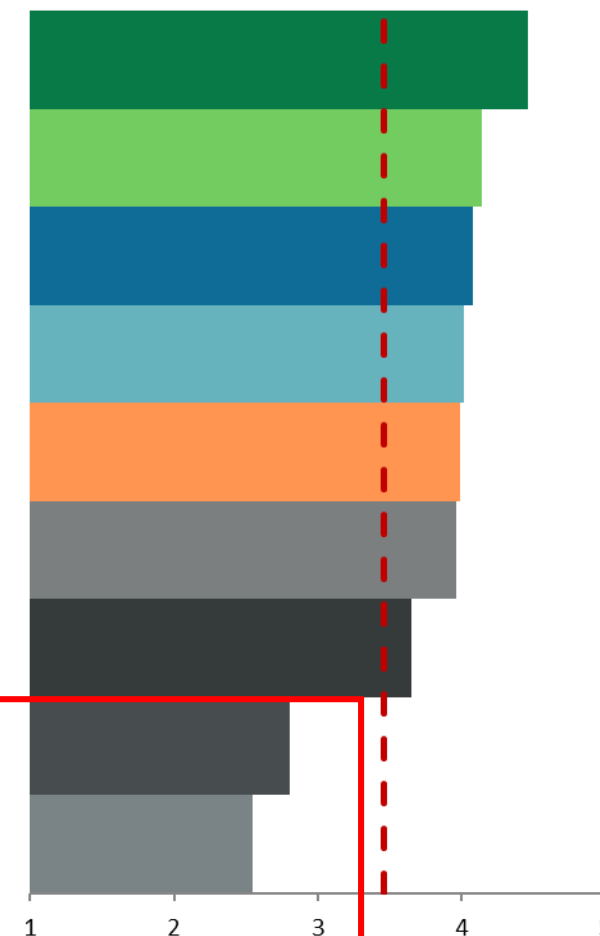
Green shading signifies that the stakeholder group outperformed the destination average by greater than 0.2.

Yellow shading signifies that the stakeholder group underperformed the destination average by greater than 0.2 but less than 0.4.

Red shading signifies that the stakeholder group underperformed the destination average by greater than 0.4.

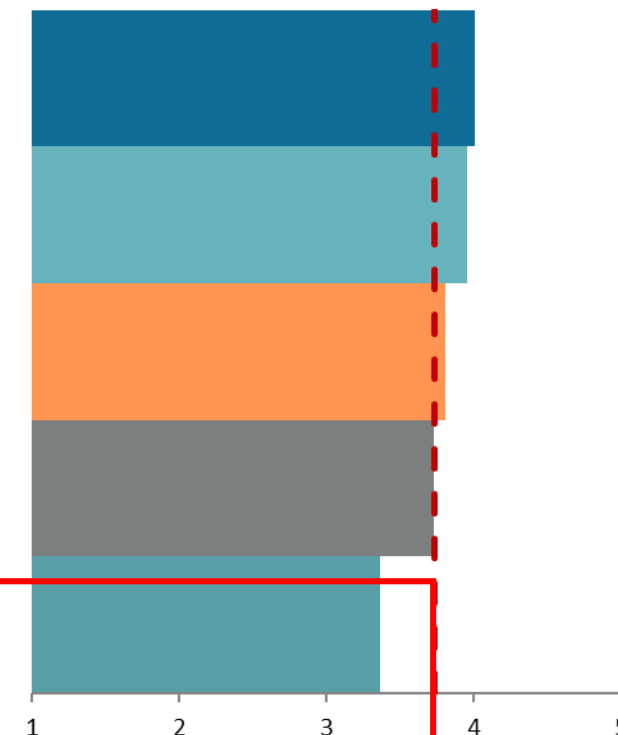
# Brand

- Is known for being safe, clean and secure for visitors
- Has an established brand that is simple, memorable and market-tested
- Appeals to a wide range of visitors
- Is known as being healthy and an outdoor, active city
- Tourism industry uses and leverages social media to support the brand
- Is known for having a lot of things to see and do
- Is known for being an environmentally conscious and sustainable destination
- Is known as a high-tech, innovative city
- Is an international destination



# Destination Performance

- Adequately measures and tracks the performance of our tourism industry
- Does a good job at communicating the performance and economic impact of our tourism industry
- Is seeing a positive growth in overnight visitation
- Accommodations are performing well (e.g. Occupancy, Revenue)
- Is successfully converting leads for meetings

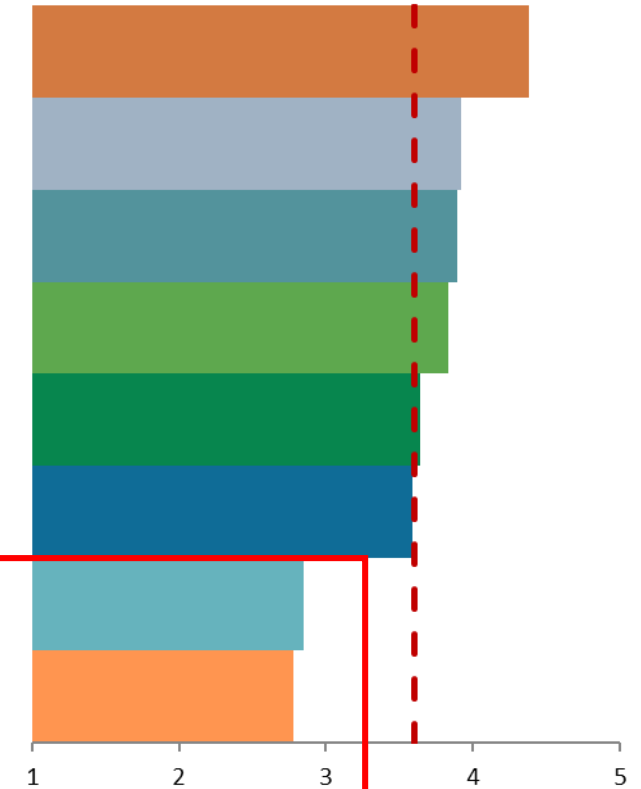


## Note

Red dashed line signifies the variable's industry average

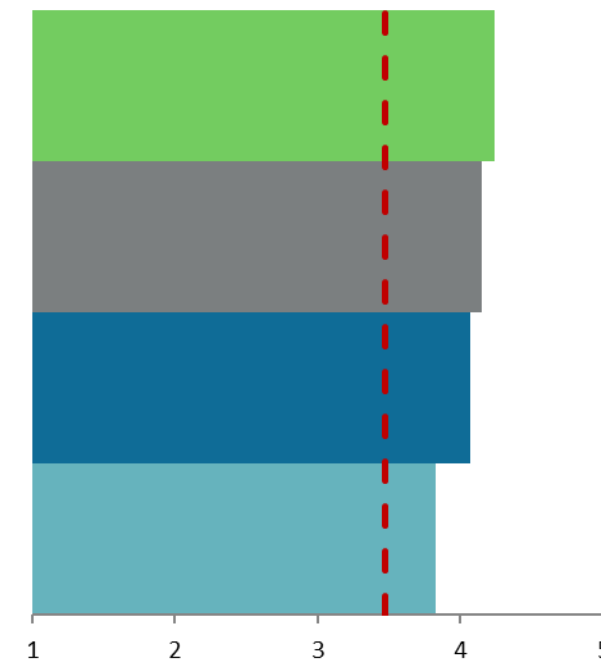
# Attractions & Entertainment

- The beach supports the brand and encourages visitors to stay longer
- Has unique and high-quality dining options
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- Has an assortment of authentic and unique attractions and entertainment opportunities
- Offers diverse and high-quality shopping opportunities
- Offers a wide diversity of parks and bike trails
- Has the type of large, famous attractions that cause people to stay
- Has high-quality and wide-ranging arts and cultural attractions



# Accommodation

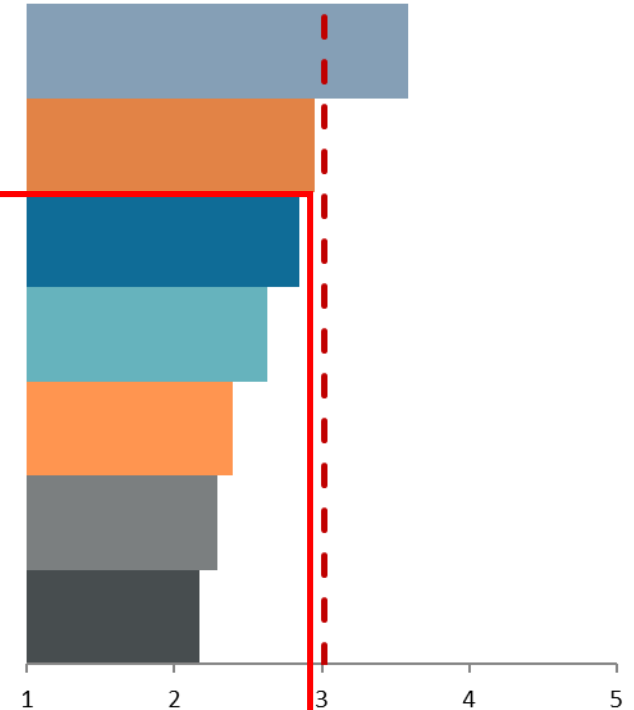
- Has an adequate supply of vacation rental accommodations
- The location and proximity of accommodation options meets visitor needs
- Has adequate accommodations capacity
- Offers a diversity of accommodation price options and has the presence of well-known brand name hotels



**Note**  
Red dashed line signifies the variable's industry average

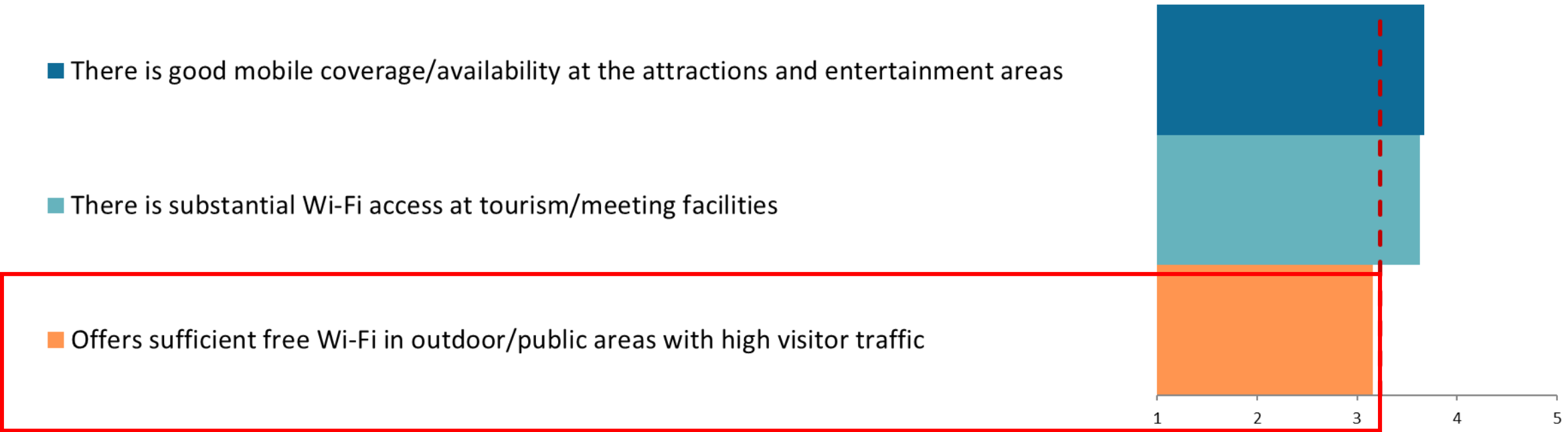
# Mobility & Access

- Has great directional signage and highways that make it easy to get around the destination
- Has adequate roads to move traffic easily during inclement weather
- Provides good access and mobility for those with disabilities
- Roads can easily handle visitor traffic throughout the year with very little congestion
- Has adequate parking to handle day-visitors to the beach
- Is a bicycle-friendly city with easy, well-marked bike routes throughout downtown
- Has adequate public transportation that makes it easy for visitors to get around



**Note**  
Red dashed line signifies the variable's industry average

# Communication & Internet Infrastructure

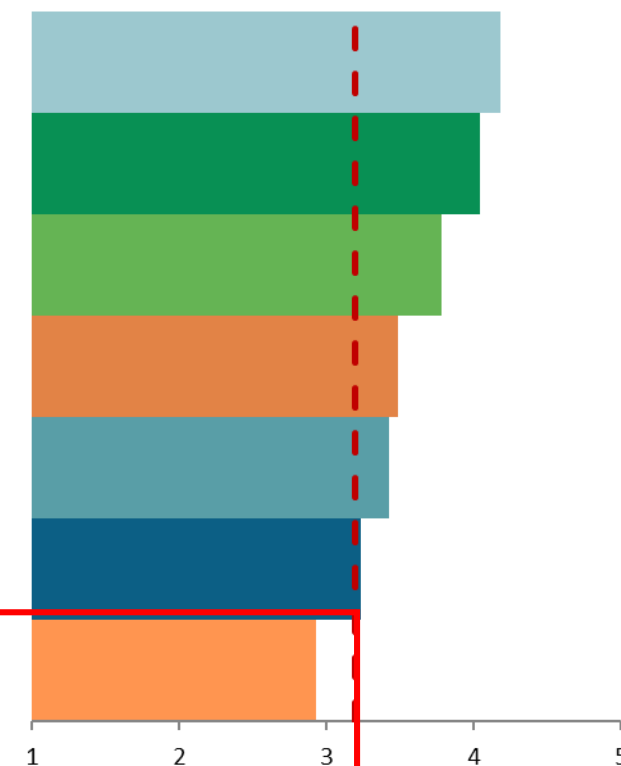


**Note**  
Red dashed line signifies the variable's industry average



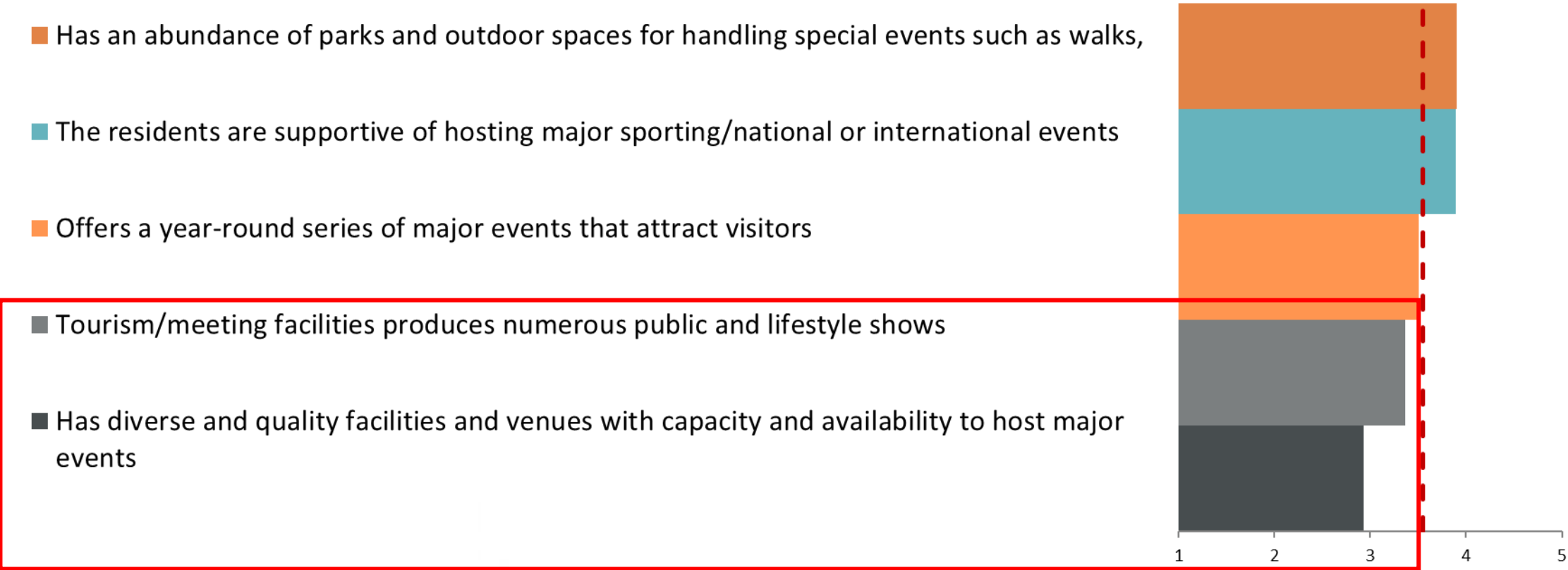
# Outdoor Recreation & Sports Facilities

- Has the sports fields and availability to host major amateur and collegiate sporting events
- Provides visitors with a wide variety of outdoor experiences
- Has adequate suppliers that coincide with outdoor recreational offerings
- The amateur sports leadership are engaged and helpful in pursuing sporting events
- Has adequate number of tours available for outdoor enthusiasts
- Has an adequate number of campgrounds and camping facilities in the area
- Has the venues to host major professional sporting events



**Note**  
Red dashed line signifies the variable's industry average

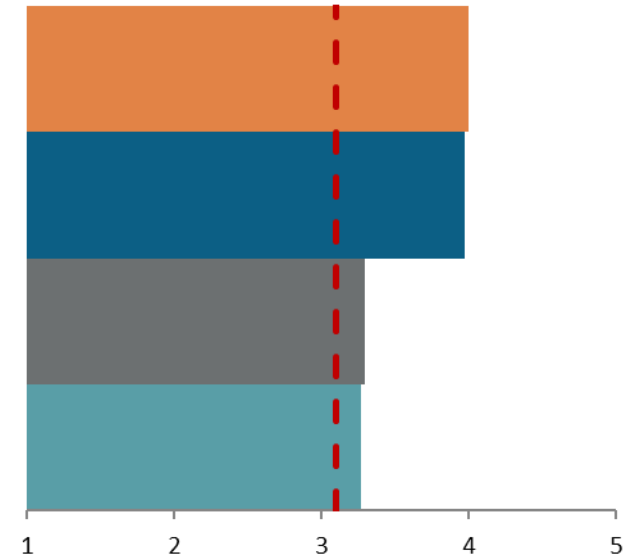
# Events



**Note**  
Red dashed line signifies the variable's industry average

# Air Access

- Airport is a state-of-the-art facility with capacity to grow
- Offers a true destination “sense of place” that supports the brand
- Offers variety and quality domestic air access (e.g. number of flights, schedule, and capacity)
- Offers a wide variety of domestic air access (e.g. number of carriers and low-cost options)



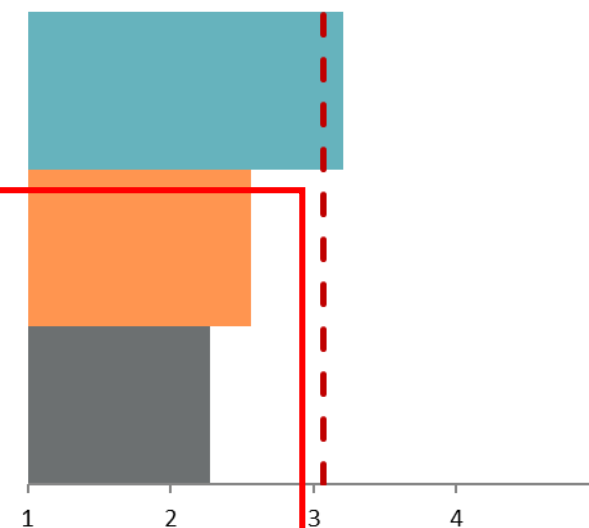
**Note**  
Red dashed line signifies the variable’s industry average

# Convention & Meeting Facilities

■ Has good, unique off-site venues for special events

■ Has the necessary meeting, and trade show facilities to compete today

■ Has the necessary, meeting and trade show facilities to compete for the next 10 years



## Note

Red dashed line signifies the variable's industry average

# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



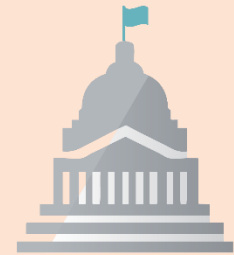
**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



**Hospitality Culture**



**Regional Cooperation**







**Funding Support &  
Certainty**



**Economic Development**

# Community Support & Engagement – N. Myrtle Beach, SC



		Relative Importance	Perceived Performance
	Funding Support & Certainty	1 <sup>st</sup>	9 <sup>th</sup>
	Workforce	2 <sup>nd</sup>	10 <sup>th</sup>
	Industry Support	3 <sup>rd</sup>	8 <sup>th</sup>
	Economic Development	4 <sup>th</sup>	2 <sup>nd</sup>

# Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)			
	Industry Average	North Myrtle Beach Average	Standard Deviation	Industry Average	North Myrtle Beach Average	Standard Deviation	
Funding Support & Certainty	10.1%	10.4%	0%	3.17	2.98	0.85	9
Workforce	10.2%	10.2%	0%	3.15	2.69	0.68	10
Industry Support	10.0%	10.2%	0%	3.69	3.70	0.61	8
Economic Development	10.3%	10.1%	0%	3.89	3.98	0.50	2
Local Community Support	10.3%	10.1%	0%	3.48	3.76	0.60	6
Effective Advocacy Program	10.1%	10.0%	0%	3.48	3.72	0.54	7
Partnership Strength & Support	9.1%	10.0%	0%	3.50	3.96	0.63	3
Effective DMO Governance Model	9.5%	10.0%	0%	3.67	3.94	0.65	4
Hospitality Culture	10.3%	9.8%	0%	3.61	3.99	0.58	1
Regional Cooperation	10.1%	9.2%	1%	3.63	3.91	0.63	5

COMMUNITY SUPPORT & ENGAGEMENT - North Myrtle Beach	3.66
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.55

## RESULTING SCENARIO TRAILBLAZERS

### Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

# Community Support & Engagement – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)						
	North Myrtle Beach Average	DMO Management Team	Board of Directors	Tourism Stakeholders	Clients	Government Leaders	Community Leaders
9 Funding Support & Certainty	2.98	2.28	2.64	2.95	2.98	3.17	3.20
10 Workforce	2.69	2.39	2.26	2.75	3.16	2.62	2.78
8 Industry Support	3.70	3.62	3.71	3.71	3.58	3.73	3.69
2 Economic Development	3.98	3.86	3.58	4.09	4.12	4.07	4.00
6 Local Community Support	3.76	3.77	3.36	3.76	4.10	3.92	3.84
7 Effective Advocacy Program	3.72	3.86	3.37	3.71	4.15	3.77	3.77
3 Partnership Strength & Support	3.96	4.07	3.67	3.97	4.19	4.03	3.99
4 Effective DMO Governance Model	3.94	3.79	3.93	3.99	4.29	3.96	3.88
1 Hospitality Culture	3.99	4.29	4.00	3.96	4.09	4.12	3.95
5 Regional Cooperation	3.91	4.27	3.86	3.88	4.08	4.01	3.89
COMMUNITY SUPPORT & ENGAGEMENT - North Myrtle Beach							3.66
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT							3.55

## RESULTING SCENARIO TRAILBLAZERS

### Note

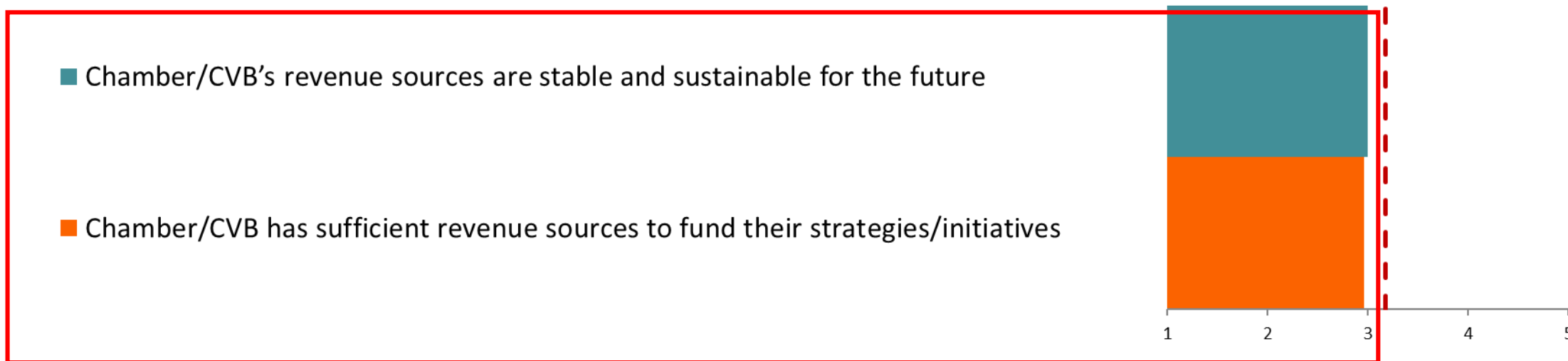
Green shading signifies that the stakeholder group outperformed the destination average by greater than 0.2.

Yellow shading signifies that the stakeholder group underperformed the destination average by greater than 0.2 but less than 0.4.

Red shading signifies that the stakeholder group underperformed the destination average by greater than 0.4.



# Funding Support & Certainty

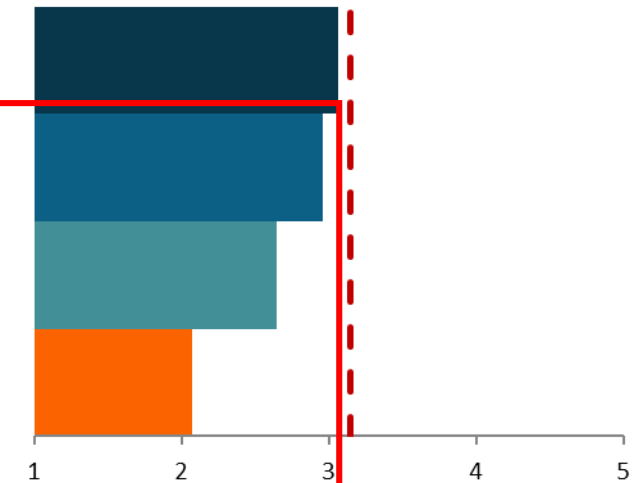


**Note**

Red dashed line signifies the variable's industry average

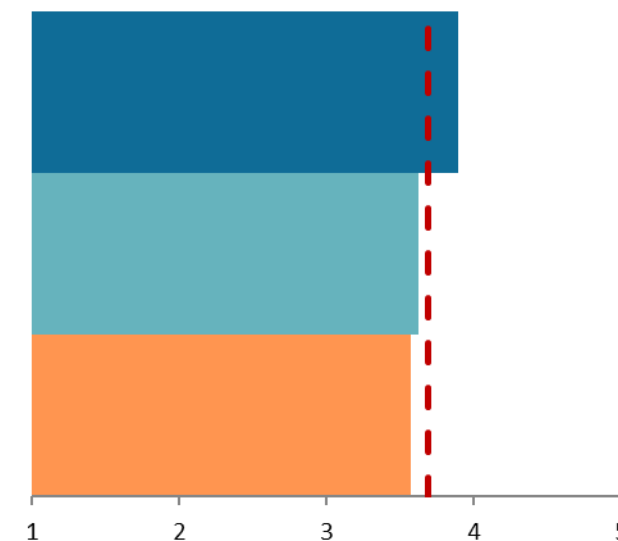
# Workforce

- Workforce is stable and has a positive labor relations environment
- Hospitality industry is able to attract and retain a high-quality workforce
- Has enough workforce housing to retain an adequate supply of workers
- Has adequate public transportation for workers to get to their jobs



# Industry Support

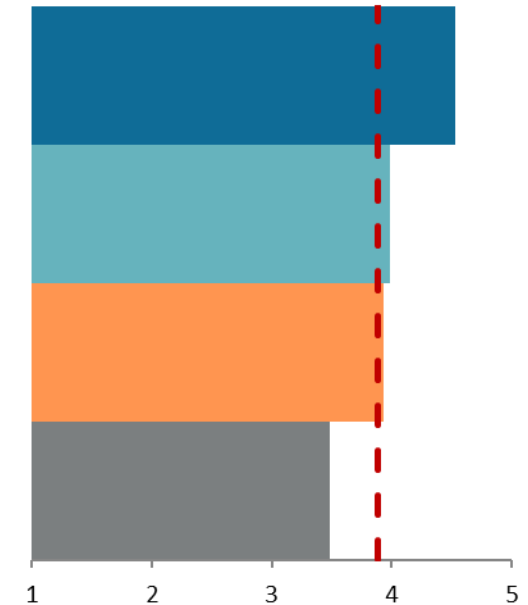
- Tourism industry leaders and stakeholders are supportive of the direction and plans
- Chamber/CVB is seen as a leader in the regional tourism industry
- Chamber/CVB is seen as a leader in the state



**Note**  
Red dashed line signifies the variable's industry average

# Economic Development

- Tourism is identified as the key economic driver
- Chamber/CVB and the tourism industry play an important role in our community's economic strategies
- Chamber/CVB has a good working relationship with regional chambers and other economic development agencies
- There is a master plan that includes future capital investment and programming

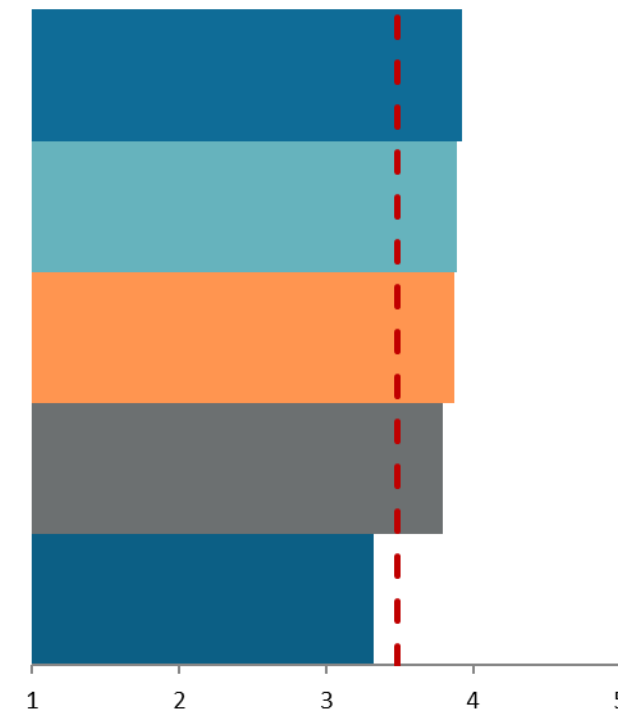


**Note**

Red dashed line signifies the variable's industry average

# Local Community Support

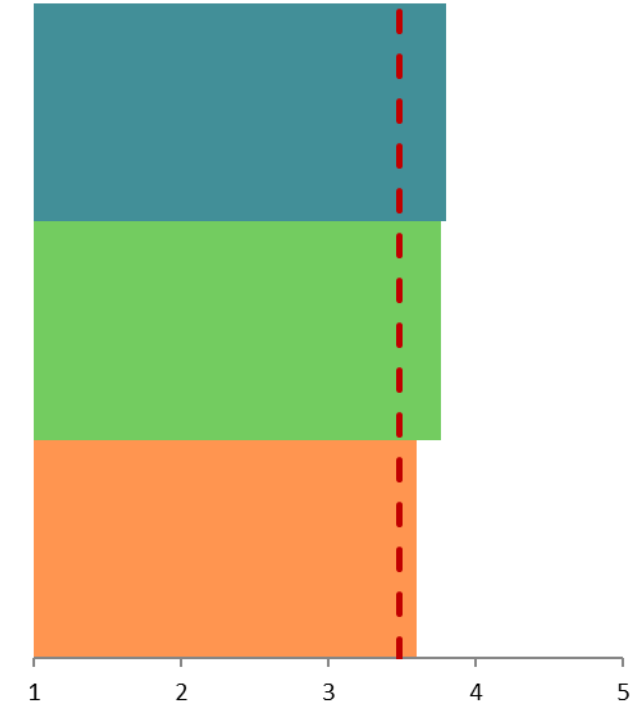
- Tourism industry gets positive media coverage locally
- Businesses have a general understanding and positive perception of tourism
- Media have a general understanding and positive perception of tourism
- Chamber/CVB has great corporate support
- Residents have a general understanding and positive perception of tourism



**Note**  
Red dashed line signifies the variable's industry average

# Effective Advocacy Program

- Local government is supportive of Chamber/CVB programs and the tourism industry
- Chamber/CVB's advocacy program is successful in educating/informing government policy
- Local government relies on Chamber/CVB for input on destination management

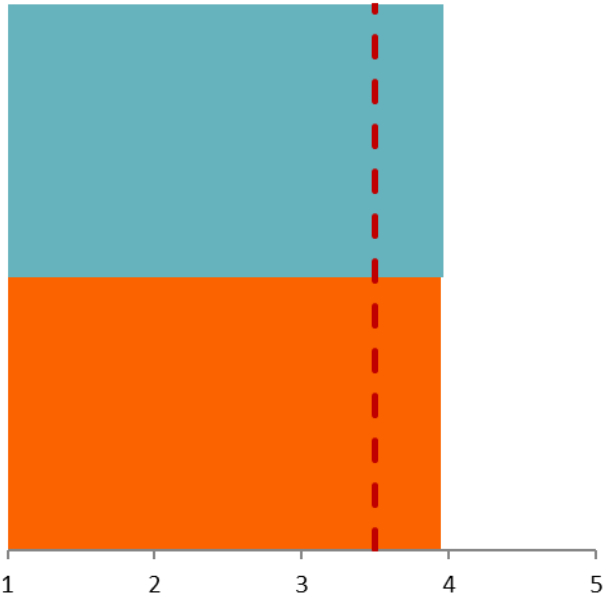


**Note**

Red dashed line signifies the variable's industry average

# Partnership Support & Certainty

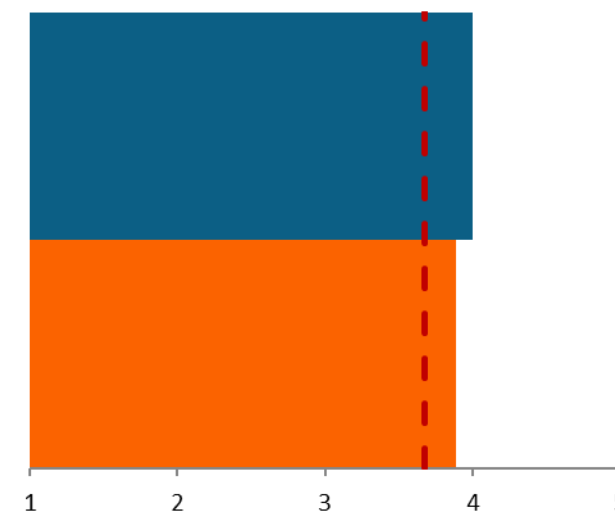
- Chamber/CVB partners are active, engaged and supportive
- Businesses that benefit from tourism/meetings find value in being a partner



**Note**  
Red dashed line signifies the variable's industry average

# Effective Destination Organization Governance Model

- Chamber/CVB has an effective governance structure, with appropriate and effective oversight and accountability
- Local leaders are engaged in Chamber/CVB's governance structure



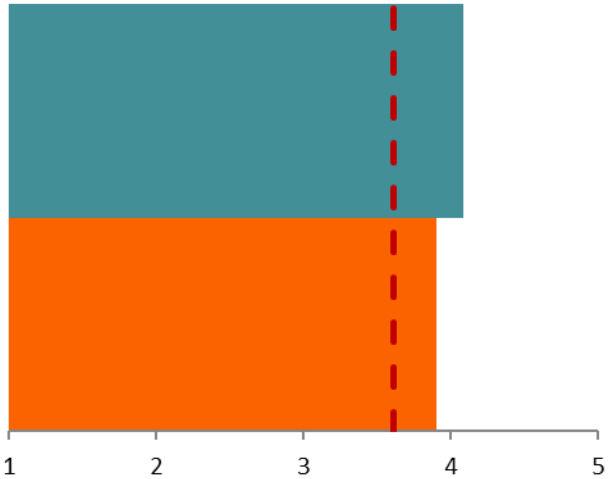
## Note

Red dashed line signifies the variable's industry average



# Hospitality Culture

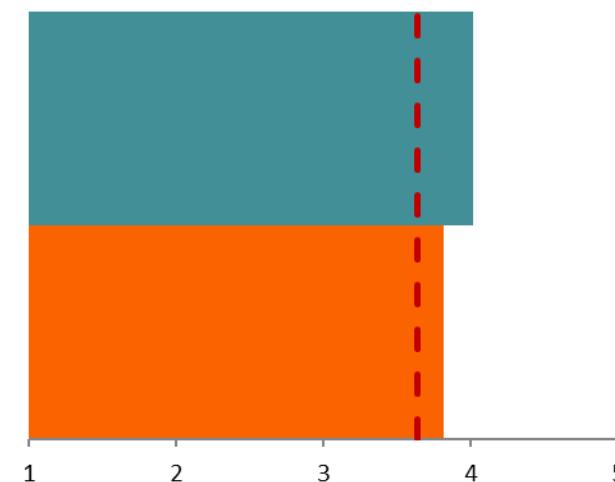
- Has a hospitality-minded culture that welcomes visitors and improves their experience
- Has a reputation for offering high-quality customer service



**Note**  
Red dashed line signifies the variable's industry average

# Regional Cooperation

- Chamber/CVB's tourism marketing efforts have broad economic benefits
- There is broad collaboration and coordination among tourism partners



**Note**

Red dashed line signifies the variable's industry average

# Key Takeaways – very positive assessment

- Currently in Trailblazers quadrant with above industry average destination strength and community support & engagement
- Stakeholders are somewhat aligned on perceptions about destination and community support



## Destination Opportunities

- Mobility & Access
- Public Wi-Fi
- Famous attractions
- Cultural attractions
- Sporting event space
- Meeting facilities
- Event venues



## Community Support & Engagement Opportunities

- Funding Support
- Workforce transportation
- Workforce housing
- Destination master plan
- Residents support

# What one thing could North Myrtle Beach do to become a better or world-class visitor destination?

## Attractions & Entertainment (30%)

- Offer a larger variety of attractions. The beach is great, but it isn't for everyone. Convention center, water park
- Have more pedestrian friendly entertainment/dining/shopping options. More waterfront dining
- Increase the size of the sports park and the state acquire part of Tilghman Point and Waite's Island for a state park
- Look for opportunities to encourage and support public/private family friendly attractions
- Truly unique attractions
- Upscale Dining and Cultural experiences
- Variety of family entertainment centers/venues ,i.e., water park

## Accessibility, Mobility & Parking (20%)

- Additional beach parking everywhere- not just Cherry Grove/Main Street
- Better roads, public transportation
- Get these roads up to par and get those utilities underground
- More public transportation for visitors. They really only have taxi or Uber/Lyft
- Move away from being automobile centric
- Offer public transportation
- Public transportation
- We need a better solution for parking. Parking is extremely limited, especially to locals

## Convention and Meeting Facilities (15%)

- Add convention and meeting spaces
- Build a convention center
- Build more hotel/convention of type facilities
- Get a conference center and scheduled conferences coming to our area. Get a major attraction to locate on the north end
- Have a venue to have bigger concerts or events
- It needs an indoor sport facility that can host major basketball and volleyball tournaments, (along with big conventions).
- Need conference center type hotel for large groups
- They would need more conference space

# Are there certain issues that NMB Chamber/CVB should specifically address?

## Accessibility, Mobility & Parking (30%)

- Get some beach parking for residents and tourists. Some kind of public transportation from one end of the beach to the other. There is zero now!
- I think Horry County residents who don't live in the city should get a heavily discounted parking pass
- Parking and transportation
- Parking fees for locals - should not have to pay
- Parking for visitors and local
- Roads, Public Transportation
- The parking and transportation issues in the community
- Traffic congestion during peak summer months
- Transportation/Parking

## Economic Development (15%)

- Environmental issues that directly affect the beach are very important since the beach is a main tourism area. Banning materials and making more beach cleaning days would be useful
- Establish an economic development vision
- Safety first
- Safety, security and family atmosphere of NMB vs MB
- The culture of the Chamber and the City in tandem need to reflect a culture that is current with nationwide trends. Protecting our natural resources. Promoting green practices and sustainable practices. In order to ask our visitors to respect our beach we need to first make it a priority

## Partnership Strength & Support (12%)

- If there is a way to involve the City Council more and educate them more
- More cooperation with the County they reside in
- We should help ignite a regional conversation about how we work collaboratively with other chambers and economic development. What are the regional goals? What is our role?
- Working with the city to get the 1% passed!
- The structure for partnership with the Chamber/CVB does not seem viable, long-term options to connect local businesses with the exposure they are seeking



# North Myrtle Beach's Main Iconic Image



# Proposed Strategic Initiatives (from Board discussion)

- **Workforce** – affordable housing, transportation, child care to support full employment in travel industry jobs
- **Destination promotion and DMO staffing** (best team possible to do the work)
  - Competitive reassessment
  - Drive higher accommodations rates
  - Redefine group recruitment with city/P&R
- **Visitor experience & economic development**
  - Mobility & access – moving people around within NMB – golf carts, crosswalks, trails, bicycles, public transportation
  - Arts, culture, culinary
  - New attraction, new demand-driver, in needs period
  - Economic development - Promote & encourage investment opportunities, 2<sup>nd</sup> property investment
  - Product development that is sustainable
- **Advocacy & community relations** – local buy-in is critical
  - Elected officials – closer partnership with the City
  - Resident perception & engagement
- **Funding support – diversify funding sources beyond accommodations**
  - City – allocation share of 1.5% tax
  - Expand SMILE & BNMB
- **Destination Master Plan** – Partner with City to encourage a master plan that combines the needs of residents & visitors into a plan for all