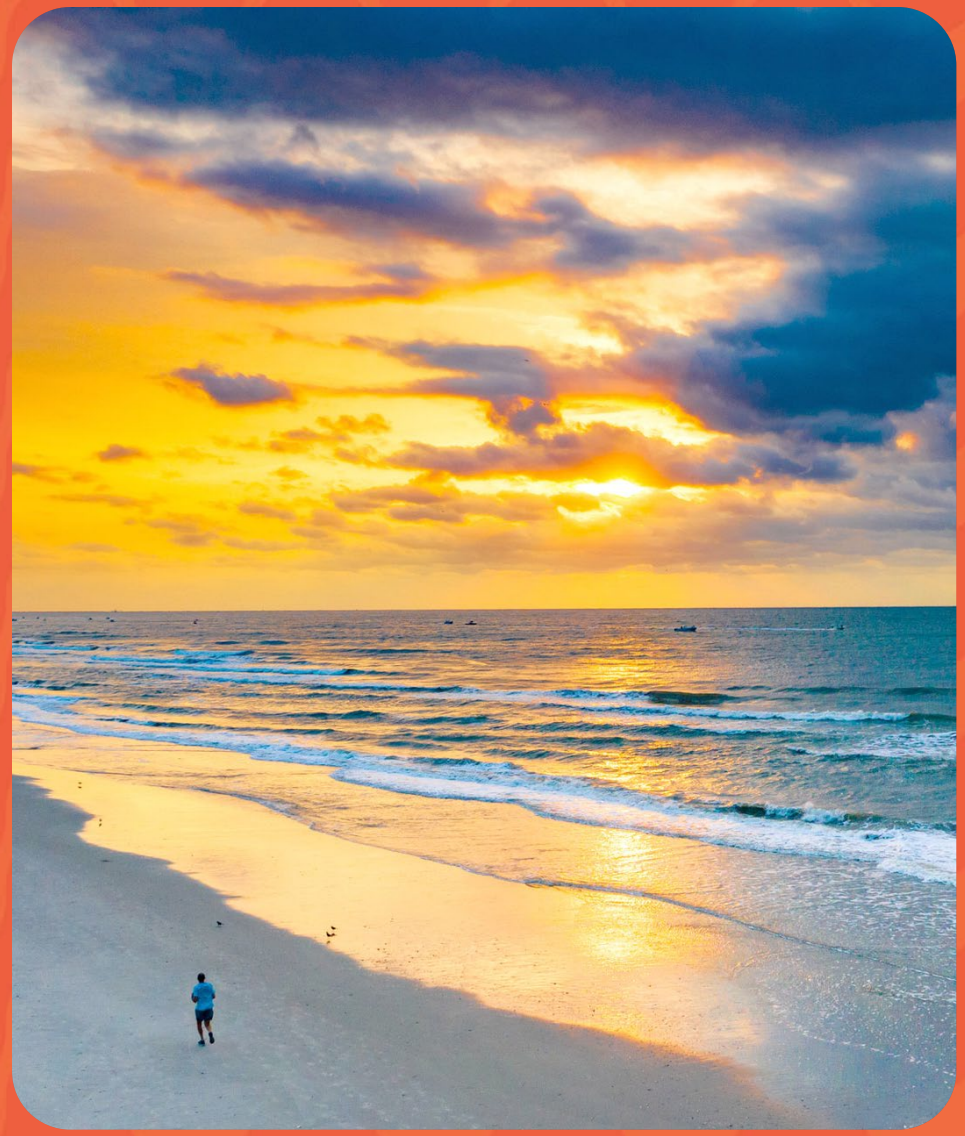
VISIT Myrtle Beach SOUTH CAROLINA

Marketing Update

October 15th, 2026



Meeting Agenda

1. **Welcome & Introduction**
   Stuart Butler, President

2. **2026 Update & 2027 Vision**
   Melissa Kavanagh, Director of Research & Technology
   Diane Charno, EVP of Marketing & Communications

3. **Groups Update & Product Development**
   Bob Harris, EVP of Group Sales

4. **Wrap-Up**
   Stuart Butler, President

5. **Email Follow-Up: Future Topics**

6. **Open Discussion & Q&A**

Welcome & Introduction

Stuart Butler, President

GREATER MYRTLE BEACH COLLABORATIVE

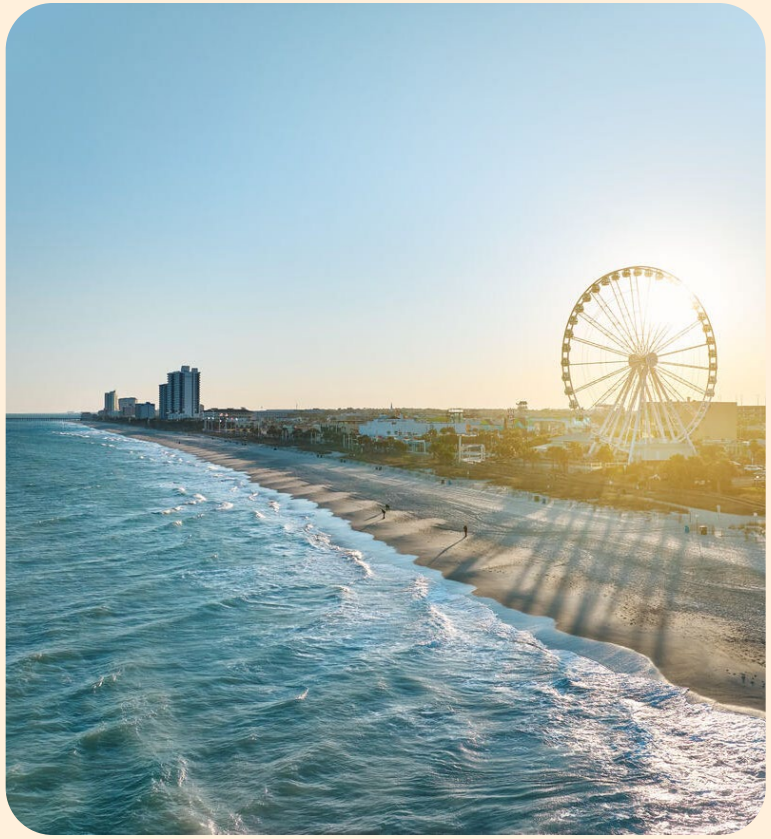
Myrtle Beach Area CHAMBER of COMMERCE®

VISIT Myrtle Beach® SOUTH CAROLINA

PARTNERSHIP GRAND STRAND

Myrtle Beach: No. 5 Best Small City in America

Source: Resonance Consultancy



2026 America's Best Cities

No. 5
Best Small City

No. 2
Lovability

No. 7
Livability

No. 55
Overall — 393 U.S. metros

What's Behind the Ranking

- Top tier alongside Savannah, Boulder, Asheville & Ann Arbor
- Noted as one of the nation's fastest-growing areas with Americans relocating to communities that offer lifestyle advantages, affordability and economic opportunity.
- Praised as a model for building a strong "sense of place" and "growth momentum"

Lovability (No. 2) & Livability (No. 7) span dining, arts, outdoors, green space, climate, housing & healthcare

Hook & Barrel: No. 1 Casual Dining in America

2026 Tripadvisor Travelers' Choice Awards

Source: Tripadvisor

Travelers' Choice™
2026
Best of the Best

#1
Casual Dining in America

#7
Casual Dining in the World

Culinary Momentum Behind the Award

- **Heidi Vukov**: the area's first James Beard Award semifinalist
- **O.A.K. Prime Kitchen and Bar**: the Grand Strand's first MICHELIN Guide restaurant
- **2026 SC honors**: Chef Joseph Bonaparte, Hospitality Educator of the Year; Chef Jordan Heyd, SC Chef Ambassador

BREAKING NEWS

11 New Nonstop Routes Are Coming to MYR

Breeze Airways expands at Myrtle Beach International, launching 2027

11

NEW NONSTOP ROUTES

on Breeze Airways at MYR

Taking off in 2027

- **Albany**, NY
- **Boston**, MA
- **Buffalo**, NY
- **Burlington**, VT
- **Columbus**, GA
- **Latrobe**, PA
- **Newburgh**, NY
- **New Haven**, CT
- **Portland**, ME
- **Portsmouth**, NH
- **Syracuse**, NY
- **8 states** NE + GA

Breeze

K-Shape Data & Market Trends

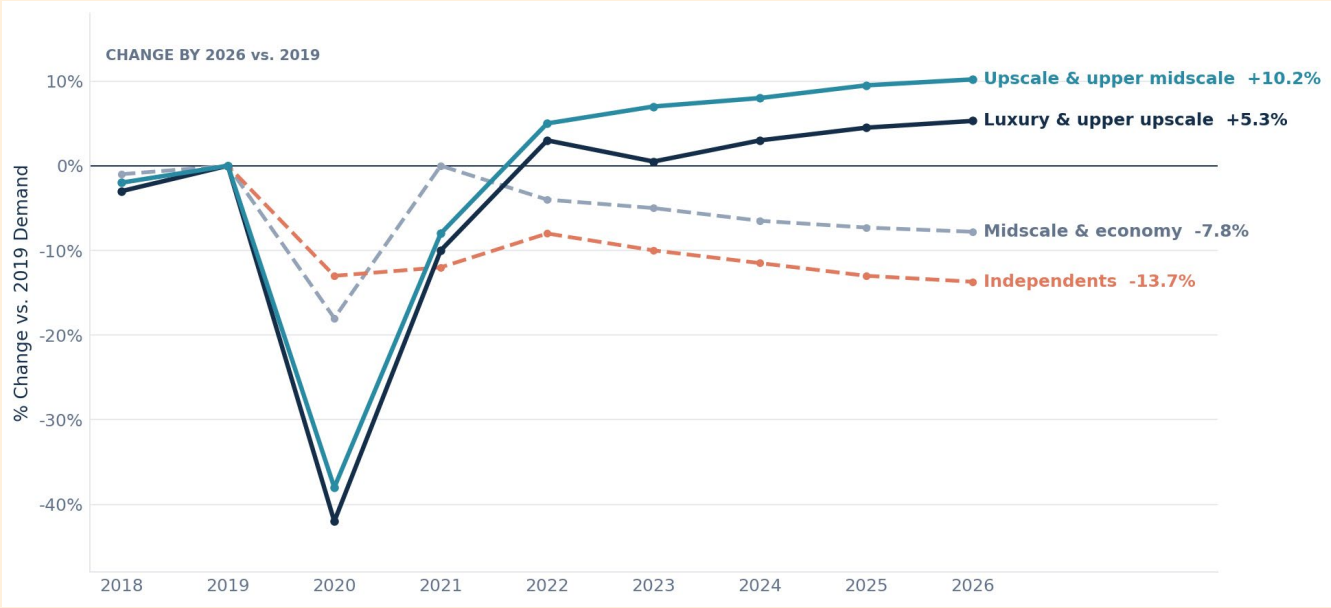
Melissa Kavanagh, Director of Research & Technology

U.S. Hotel Demand: Recovery Has Been Tiered

By 2026, upper-tier chains are forecast above 2019 demand; midscale, economy & independents remain below

Demand by Hotel Tier

- Luxury, upscale and upper-midscale hotels have cleared 2019 demand and are projected to keep growing through 2026.
- Midscale & economy (-7.8%) and independents (-13.7%) remain below 2019, with mild declines expected in 2026.
- The K-shape that follows is built on this foundation: same property mix, different trajectories by tier.



Source: Tourism Economics

Travel Spending Is K-Shaped

Higher-income households are driving 2026 travel growth; lower-income is pulling back

After-tax wage growth, YoY April 2026

6.0%
Higher-income

2.3%
Middle-income

1.5%
Lower-income

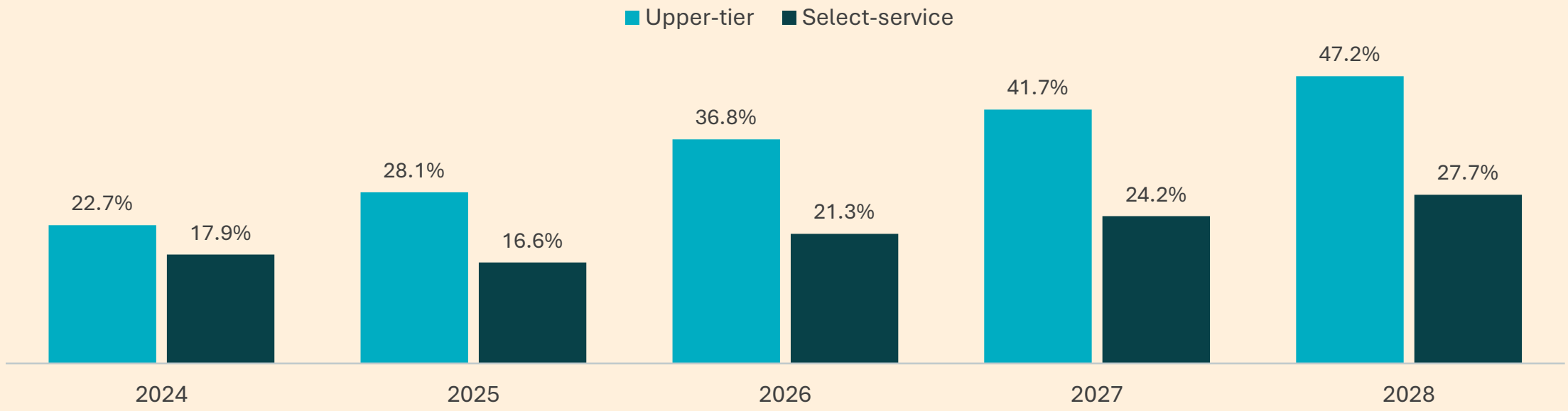
Takeaway: Travel-spending growth is concentrated in higher-income households

Source: Bank of America Institute, May 2026

National Hotel Revenue Favors K-Shape

Upper-Tier properties continue to grow revenue, while Select-Service is stagnant

Room revenue vs. 2019 levels, % change, by chain tier, 2024-2028E

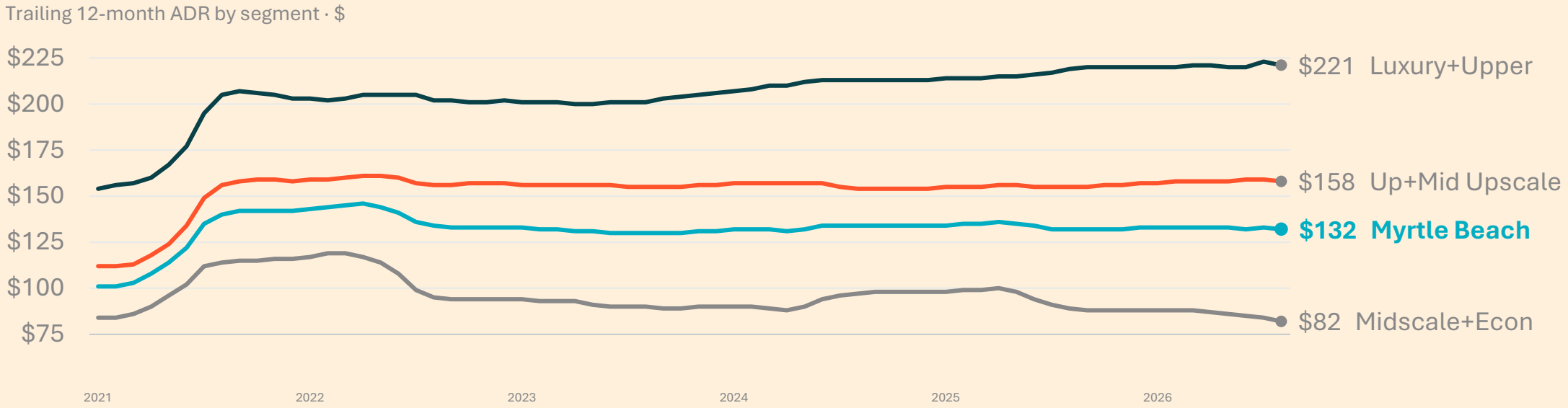


Takeaway: By 2028, upper-tier revenue is forecast to reach 47% above 2019 levels, nearly double select-service's 28% gain, widening the K-shaped gap through the forecast period.

Source: Tourism Economics/CoStar 2026

The K-Shape Plays Out Locally in Myrtle Beach

Occupancy and ADR show upper-midscale+ outperformance vs. the broader market



Takeaway: Myrtle Beach mirrors the national K-shape — the higher-end segment is where growth and investment are concentrating.

Source: CoStar, August 2026

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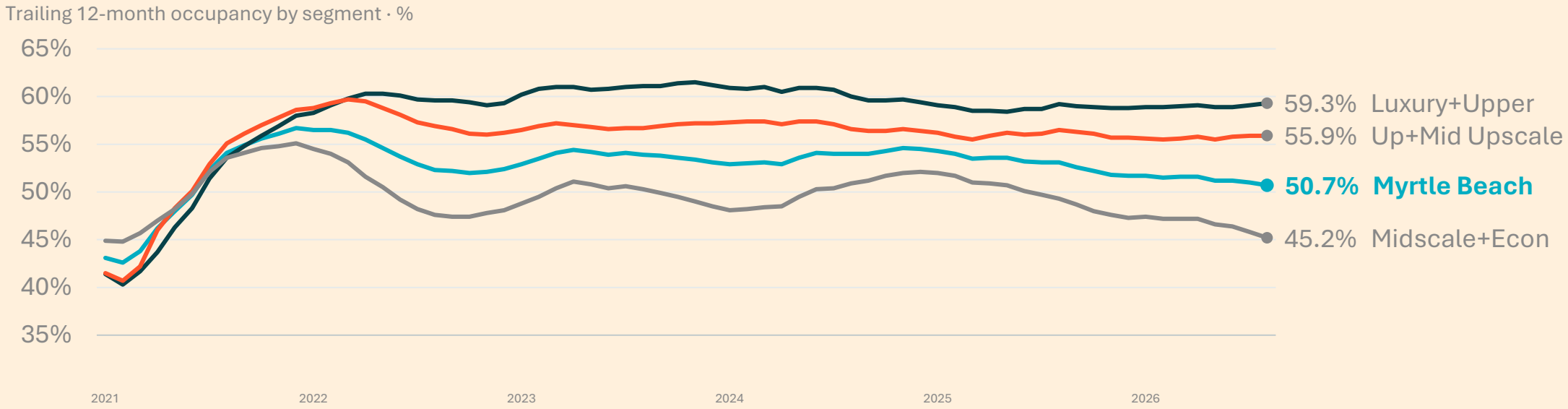

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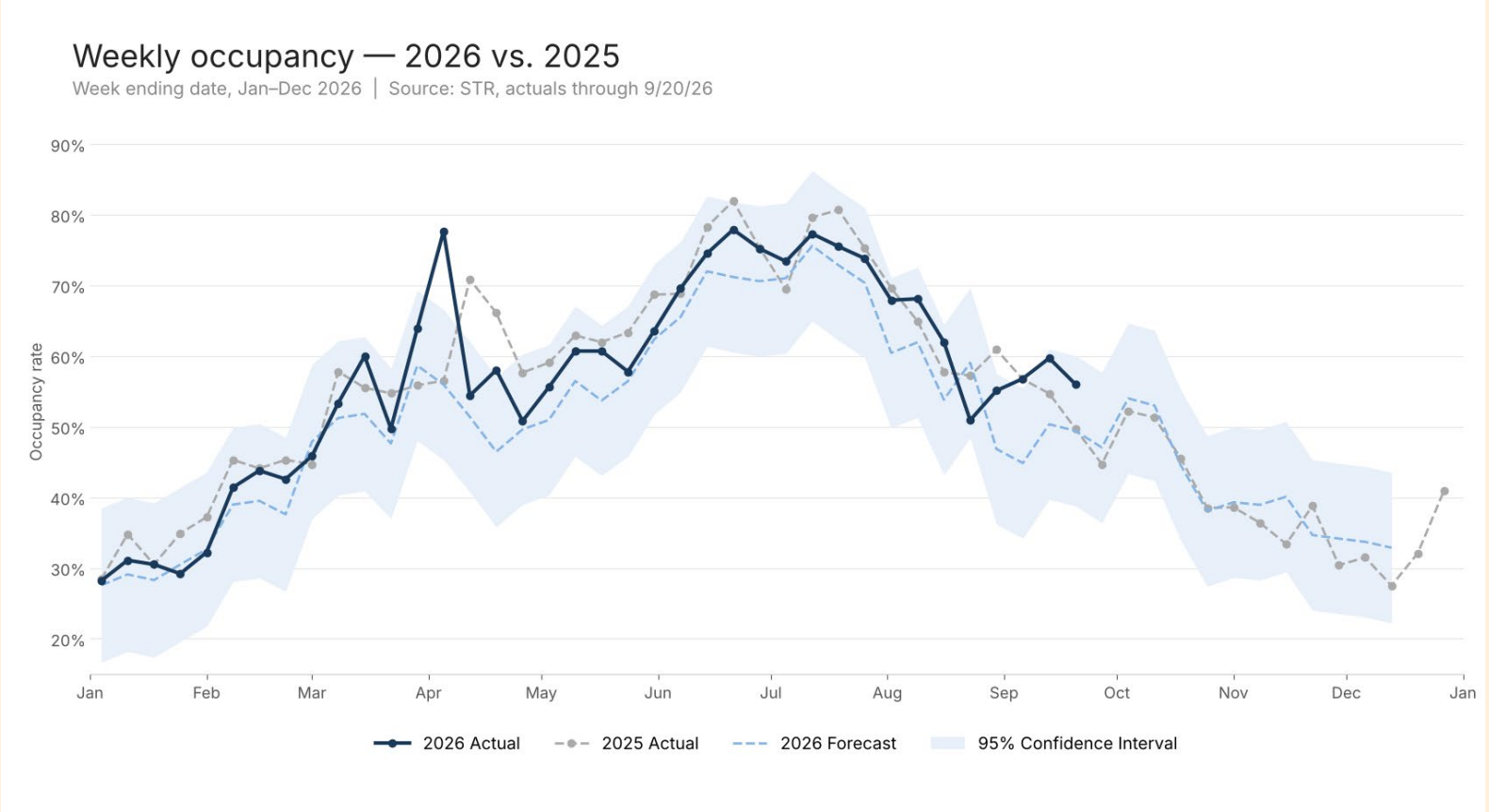
Source: CoStar, August 2026

Year-End Outlook

Ahead of forecast, but economic factors still a headwind

- Gas prices still up substantially YoY.
- Most weeks have beaten forecast, though still under 2025 occupancy.
- Easter and July 4th were substantially above last year

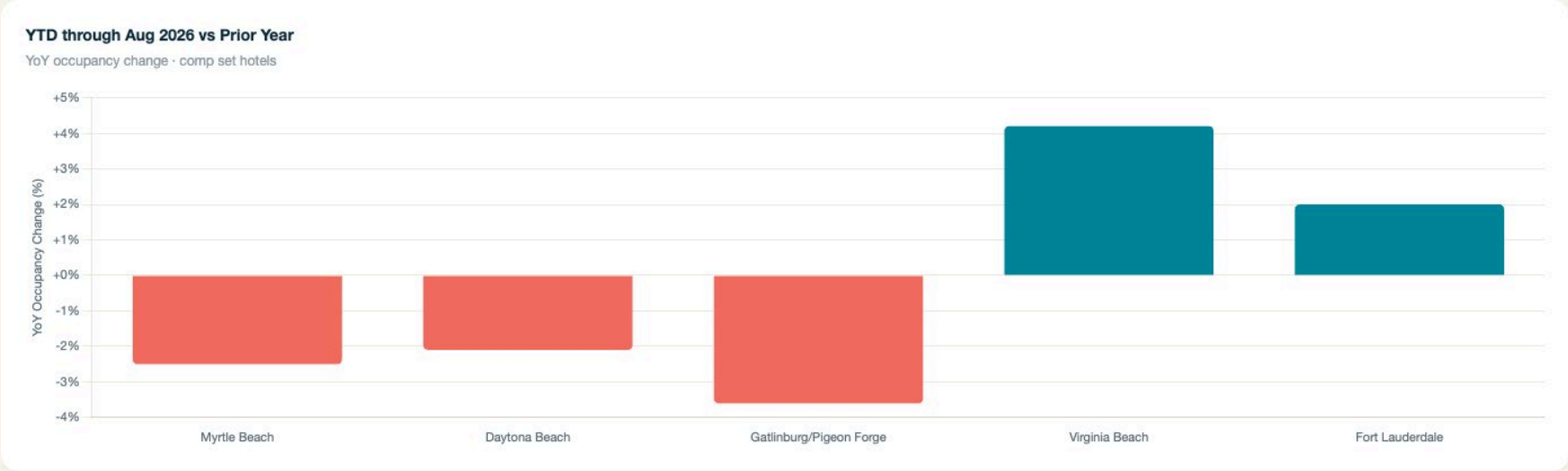


Source: Luckie / CoStar, October 2026

YTD vs. Competitors

Could be worse

- Down 2.5% YTD
- Gatlinburg down nearly 4%
- Virginia Beach up, but different demographic and product mix

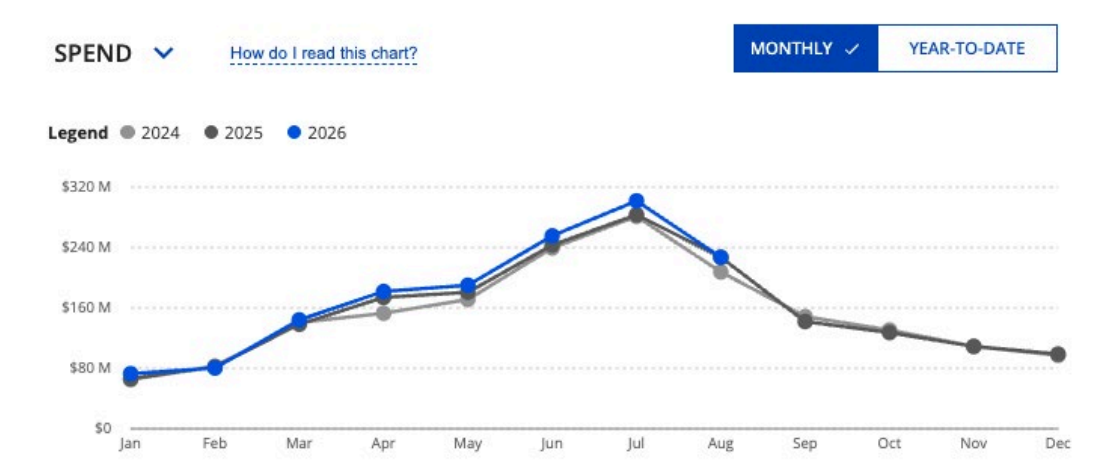


Source: CoStar, August 2026

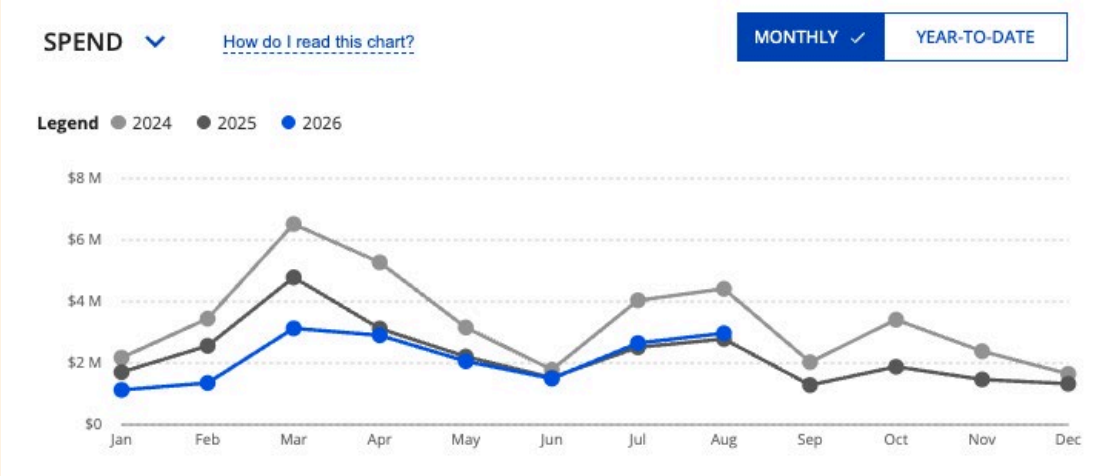
Visa Spend – Domestic & International

Domestic spend hits a new high in 2026; international spend still trails 2024

Domestic Visa Card Visitor Spend



International Visa Card Visitor Spend



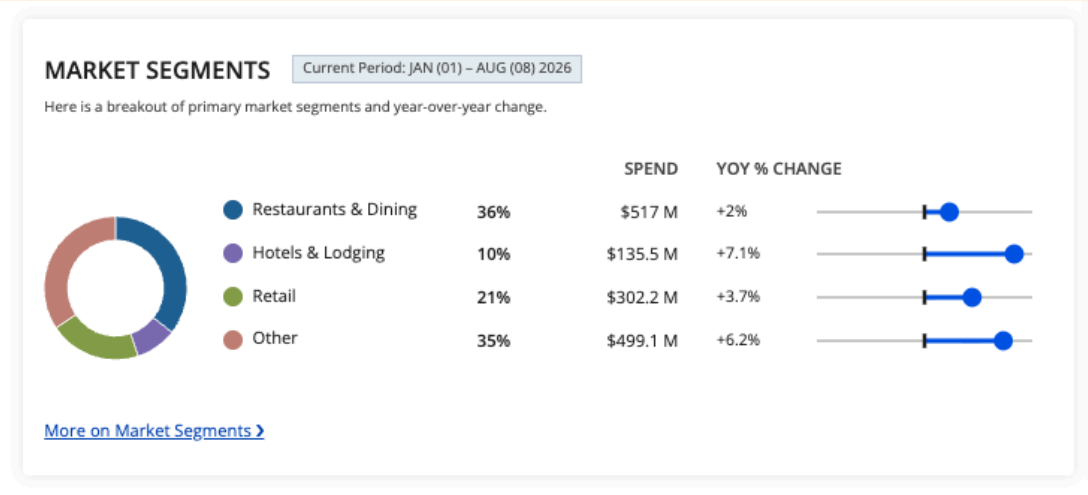
Period: Jan–Aug 2026 | Source: Visa Destination Insights
Not adjusted for inflation

TAKEAWAY: Domestic Visa spend is outpacing both 2024 and 2025, reaching a new peak of roughly $320M in July 2026. International spend remains well below 2024 levels and is tracking closer to 2025, a sign international travel has yet to fully recover.

Visa Spend by Market Segment - Domestic

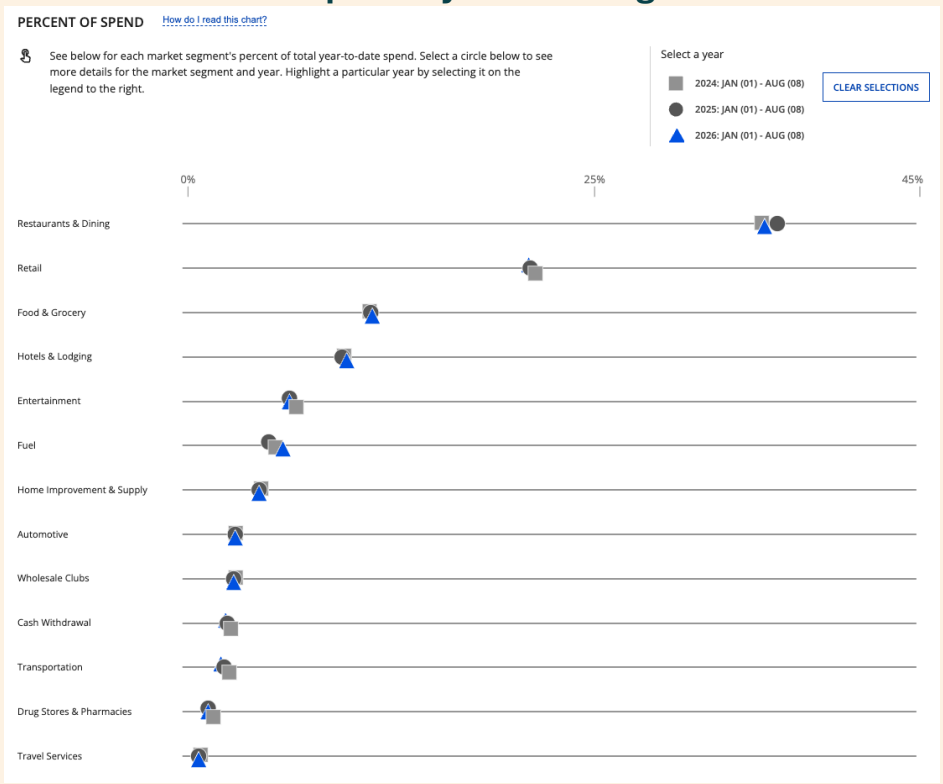
Spend is up across most business types

YoY Visitor Spend by Market Segment



Period: Jan–Aug 2026 | Source: Visa Destination Insights
Not adjusted for inflation

Percent of Visitor Spend by Market Segment

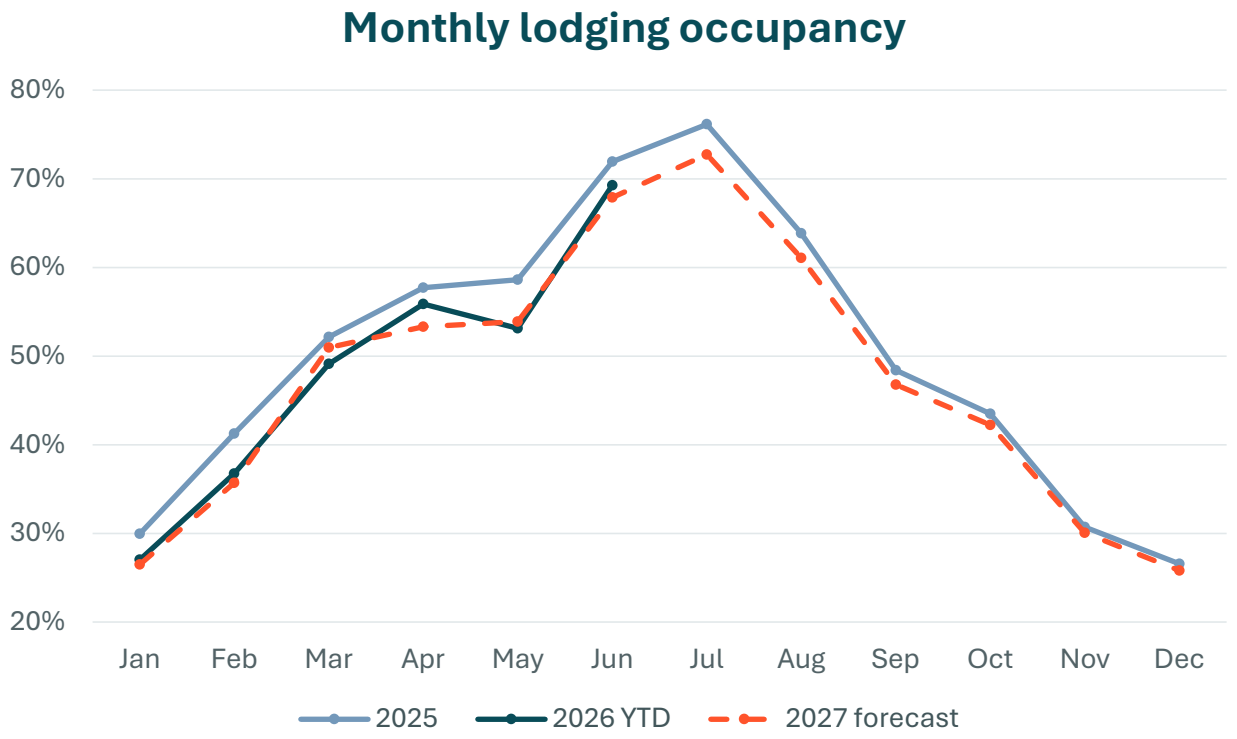


TAKEAWAY: As a percentage of spend, dining shifted slightly lower as groceries shifted slightly higher. Fuel has increased.

2027 Tourism Economics Forecast

Actual Performance Could be Lower

- **Gas Prices. Gas Prices. Gas Prices.**
- **Inflation may stay higher.** Regional CPI points to less relief than TE assumes.
- **New Canadian Tariffs**
- **Student Loan Repayments.** COVID-delayed repayments are slated to go back into effect in November, decreasing discretionary income.



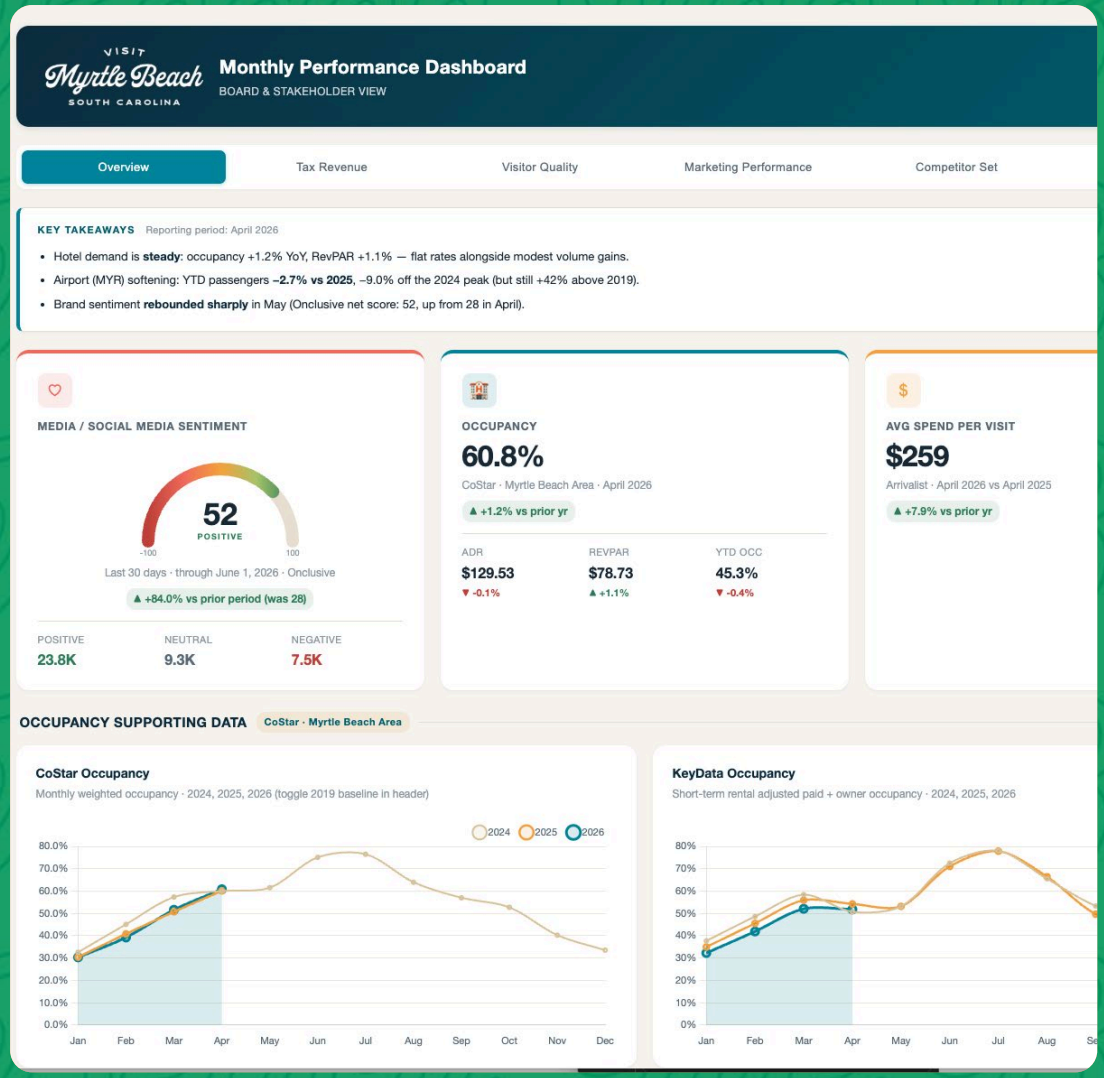
Hotels + short-term rentals. 2026 YTD: Jan–Jun actuals. Sources: Tourism Economics, Luckie - Aug, 2026.

VISIT Myrtle Beach SOUTH CAROLINA

KPI Dashboard

Melissa Kavanagh, Director of Research & Technology

visitmyrtlebeach-universal-dashboard.netlify.app



CoStar Occupancy

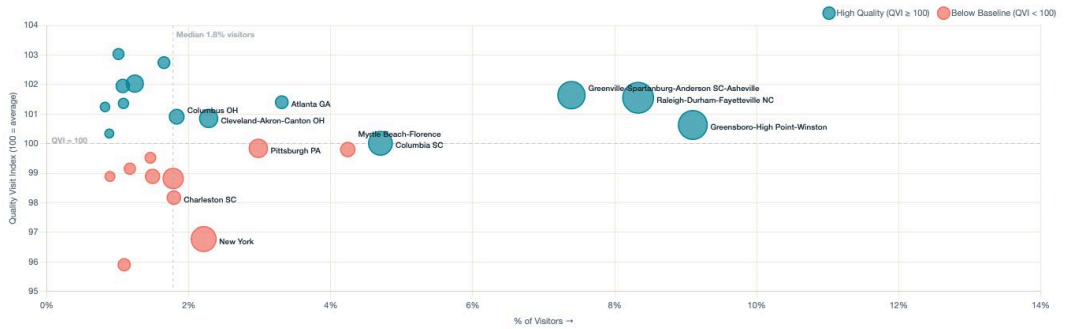
Monthly weighted occupancy · 2024, 2025, 2026 (toggle 2019 baseline in header)

KeyData Occupancy

Short-term rental adjusted paid + owner occupancy · 2024, 2025, 2026

Zartico — Top 25 Quality Visit Markets

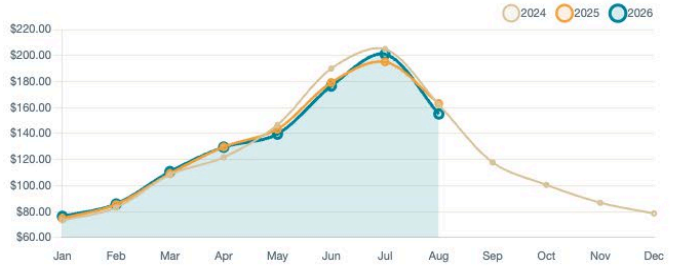
August 2026 · bubble size = % of Spend · **top-right quadrant** = high volume + high quality (above 100 QVI)



Reading the chart: Quality Visit Index (QVI) above 100 indicates a market spends/engages more than average; below 100 indicates lower-quality visits. Reference lines mark QVI=100 (quality baseline) and the median visitor share. Markets in the top-right are high-volume + high-quality; top-left are smaller but punching above their weight.

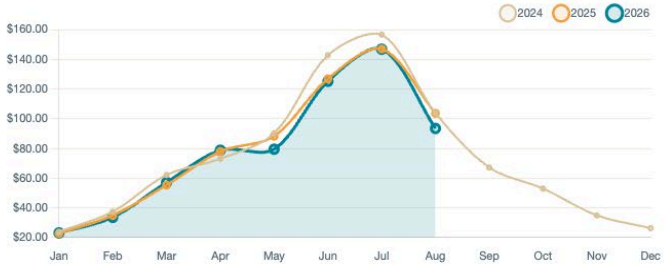
CoStar ADR

Average daily rate, USD



CoStar RevPAR

Revenue per available room, USD



ARRIVALIST — SPENDLIFT EXECUTIVE SUMMARY

Rolling 12 mo · ending August 2026

ATTRIBUTED IMPRESSIONS	TARGET SPEND	INCREMENTAL SPEND
18.4M	$7.3M	+$2.4M

MMGY — YTD Spend by Channel

Year-to-date breakdown by channel · Digital Media, Paid Search, Paid Social, Offline Media

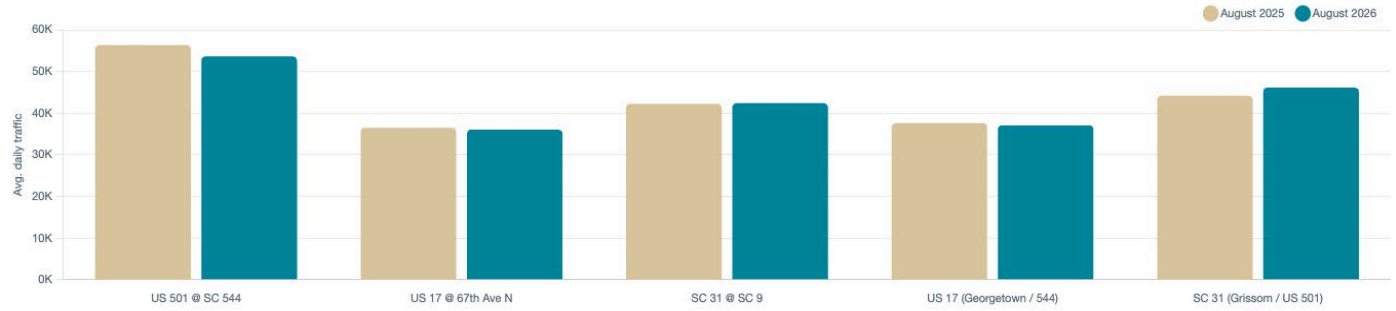
Digital Media	$7,229,431 Total Spend	577,319,300 Impressions	1,065,797 Clicks	4,277,919 Total Engagements	$1.69 Digital CPE	137,310 Total Referrals	$52.65 CPR
Paid Search	$2,585,092 Total Spend	68,933,517 Impressions	2,604,499 Clicks	6,770,916 Total Engagements	$0.38 Digital CPE	613,755 Total Referrals	$4.21 CPR
Paid Social	$1,595,822 Total Spend	404,191,353 Impressions	3,479,800 Clicks	3,495,973 Total Engagements	$0.46 Digital CPE	113,284 Total Referrals	$14.09 CPR
Offline Media	$1,784,746 Total Spend	325,798,538 Impressions					

SCDOT TRAFFIC

Gateway corridors · Myrtle Beach area

SCDOT Traffic — August YoY by Station

Average daily traffic (by month) · August 2026 vs August 2025 · 5 SCDOT stations



2027 Markets & Audiences

Diane Charno, Executive Vice President of Marketing & Communications

Every Market Earns Its Place

2027 markets are scored on visitation, not just clicks

Opportunity signals

- Website engagement by market
- Audience concentration
- Direct flights and gas prices
- School Break Schedules

Visitation signals

- Placer.ai nights and visits
- Arrivalist arrivals
- Visa Destination Insights spend

Total Market Score

Where each market ranks for 2027

The rule: markets that send visitors get more investment. Markets that only send clicks get less.

2027: Where We'll Be

Lean into drive. Protect the shoulder. Follow the air.

Drive · year-round

Shoulder-season engine: no airfare, flexible timing

Atlanta, Augusta, Charleston, Charlotte, Chattanooga, Greensboro, Greenville–New Bern, Jacksonville, Knoxville, Norfolk, Raleigh–Durham, Richmond, Roanoke–Lynchburg, Savannah, Tri-Cities, West Virginia, Wilmington (+ Lexington in summer)

Long haul · core

Year-round Northeast & Midwest anchors

Baltimore, Boston, Cleveland, Columbus, Harrisburg–Lancaster, Hartford, New York, Philadelphia, Pittsburgh, Washington, D.C.

Long haul · flex

Optimized as routes and results move

Markets with strong air access into MYR, rotated by season and performance

How the money moves through the year

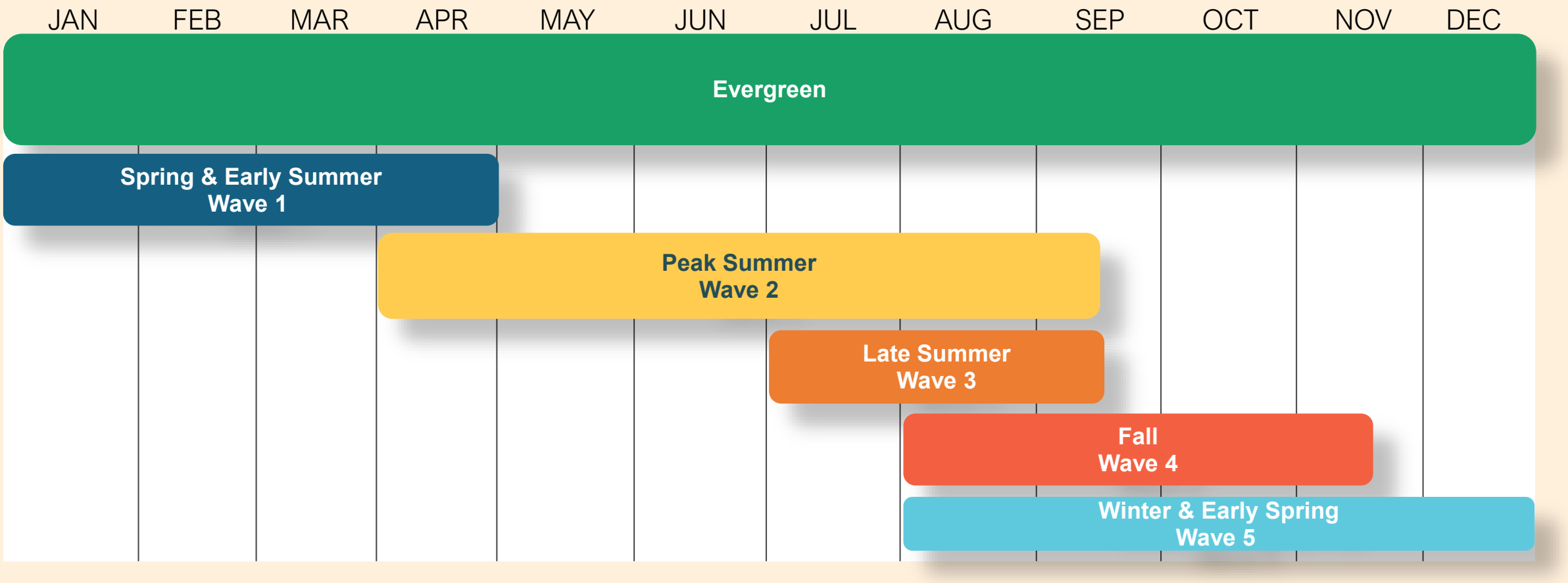
Always-on	Spring	Summer	Late summer	Fall	Winter

$14–$18 per visitor inquiry

2026 test markets: Albany, Wilkes-Barre/Scranton, Louisville

SEASONALITY

Leisure Seasonal Weighting



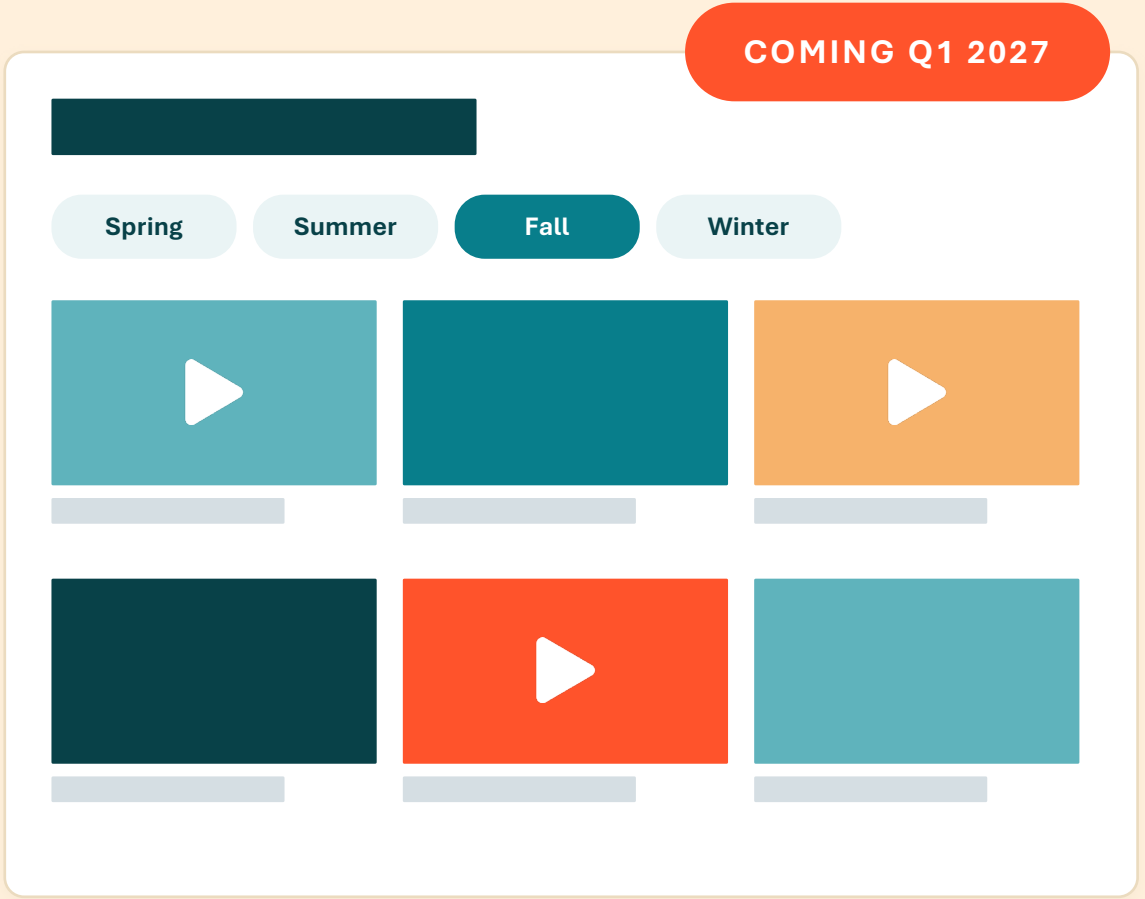
Coming Q1 2027: See the Work

A partner view of the campaigns running for Myrtle Beach

What's in market now
By season and by market

The ads themselves
Video, social, digital and print

Built by our team
First look at the next marketing session



Tell us what you'd want to see in it.

Groups Update

Bob Harris, Executive Vice President of Group Sales

Group Sales Production through Oct 9th

709 Group Leads

310,035 Group Lead Room Nights

371,976 Definite Room Nights

Product Development

Bob Harris, Executive Vice President of Group Sales

Product Pipeline

Eight lodging projects are moving inside the city

Property	Project	Rooms	Status
Fairfield by Marriott Oceanfront	Former Sun & Sand, gut renovation	199	Reopens Nov 2026
The Caretta	Boutique conversion of the Beverly Beach	26	Opens late Nov 2026
Captain's Quarters	Entertainment deck, The District, meeting room	—	Renovation underway
Ocean's 23 by Hilton	Vacation resort, 376 bedrooms	227 units	Opens Q2 2028
Hampton Inn & Suites / Home2	Dual-brand new build at 21st Avenue	230	Planning
Drury Plaza Resort	New resort on the Sea Dip site	400	Demolition underway
Extended Stay America	On 501 inside the 17 Bypass	85	Opens early 2027
Margaritaville Resort	17-story oceanfront at 17th & Ocean	267	Planning

Two oceanfront hotels reopen this fall

Fairfield by Marriott Oceanfront: reopens late 2026

- Former Sun & Sand, gut-renovated under single ownership
- 199 rooms back online in late 2026

The Caretta: Opening in late November

- Boutique conversion of the former Beverly Beach: 26 rooms across six stories
- Managed by Lark Hospitality of New England, a boutique-hotel specialist

Captain’s Quarters adds The District

The District with 17,000 sq ft

- Strike Zone 8-lane mini bowling and a cashless arcade
- New restaurant and a Starbucks Grab n’ Go

Group and meetings

- New entertainment deck for group events
- New bookable meeting room

Additional Lodging Projects

- **Compass by Margaritaville Resort** — 1717 S Ocean Blvd in North Myrtle Beach. 14 stories with 150 units opening in the spring of 2027
- **Hampton Inn & Suites Cherry Grove –** 3600 N Ocean Blvd in North Myrtle Beach. 7 stories with 156 1-bedroom units opening in spring of 2027
- **Hotel Conway –** still in the planning phase for a 60-room boutique hotel with approx. 2,000 sq ft of event space inside and an additional outside event space. Same developer as The George hotel in Georgetown.
- **Hampton Inn & Suites Surfside Beach** – 127 room hotel by OM Hotel Group currently under construction next to Johnny D's.
- **Comfort Inn & Suites** — the former Palette Resort at 7th Ave South is completing renovations and will reopen as a Comfort Inn & Suites in January of 2027 with 129 units.

New dining and entertainment

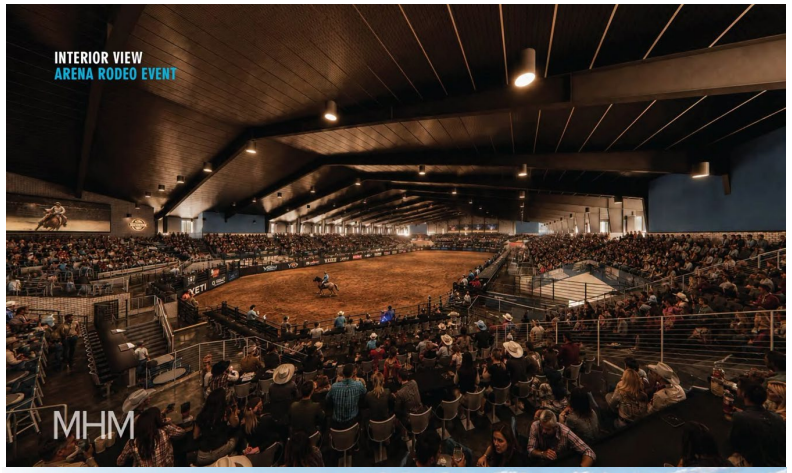
- **The Big Fish** — Broadway at the Beach; opened in Sept with a 5,000 sq ft entertainment deck and oyster bar
- **Ole Smoky & Yee-Haw Brewing** — drawing strong crowds at Broadway at the Beach
- **New Morning Breakfast** — Homegrown Hospitality takes the former T-Bonz at Hwy 17 Bypass & 21st Ave N
- **Bubba Gump's** — Landry's Seafood owners rebrand in 2027 after 31 years on the site
- **357 Brewers** — broke ground in September; opens 2027
- **Southern Social and Rustic & Rye** going into Broadway at the Beach in 2027 in space formerly occupied by American Tap House and Roosters Restaurant and Bar.
- **Ripley's Aquarium** — seven African penguin chicks join Penguin Playhouse
- **Raising Cane's** — coming to the former Burro Loco site on Jason Blvd
- **Legends Golf Resort** – New Ken Baker-designed 12-acre par-3 lighted course opens late 2026, night play, patio views of every hole and multiple F&F outlets
- **AlleyOops North Myrtle Beach -** opened on Sept 18th with coastal dining, bowling, arcades, virtual reality and a live shark bar.
- **Crave** - 3rd location at Sayebrook opening in spring of 2027

WaveGarden Myrtle Beach

- **$150 million development** to be completed by January of 2030 in Broadway at the Beach at the Corner of 21st St and 17-Bypass on the site of the former Palace Theatre. Construction is scheduled to begin by September of 2027.
- Site is planned to include:
  - 5.5 acre wavegarden surf lagoon
  - Lazy river
  - Tropical beach areas
  - 4-star flagged hotel with at least 150 lodging rooms
  - Restaurants
  - Retail establishments
  - Year-round entertainment complex

Horry County Rural Civic Center

- Venue will include an indoor arena, fairgrounds midway and a covered arena connected to a 200-stall barn
- Located at Highway 501 and SC-22 in Conway
- 500-acres of county owned land.
- Indoor arena for concerts, rodeos, livestock shows, conventions, expos and community celebrations.
- Future phases may include an Expo Hall, RV camping sites and walking and equestrian trails.
- Midway area will offer room for fairs, festivals, farmers markets and family-friendly entertainment.
- Venue will also include a National Guard Readiness Center



Wrap-Up

Stuart Butler, President

Open Discussion

Two ways to ask a question on Zoom:

Raise your hand

Click Reactions, then Raise Hand, to ask live

Use the chat

Type your question in the Zoom chat