



2021 Destination Marketing Organization Industry Metrics

Annual Report

HILTON HEAD ISLAND

SOUTH CAROLINA

The purpose of this document is to provide the Town of Hilton Head Island Finance and Administration committee with tourism metrics and/or reports to showcase annual Destination Marketing Organization (DMO) performance in efforts pertaining to promotion of Hilton Head Island. It is understood and acknowledged that such metrics and/or reports may change from time to time based upon best practices, funding and the goals set forth in the marketing plan. The evaluation shall consider the metrics and reports in this document, collectively, and shall be compared with peers and other factors that affect the tourism industry such as the state of the economy, weather, condition of the lodging properties, etc.

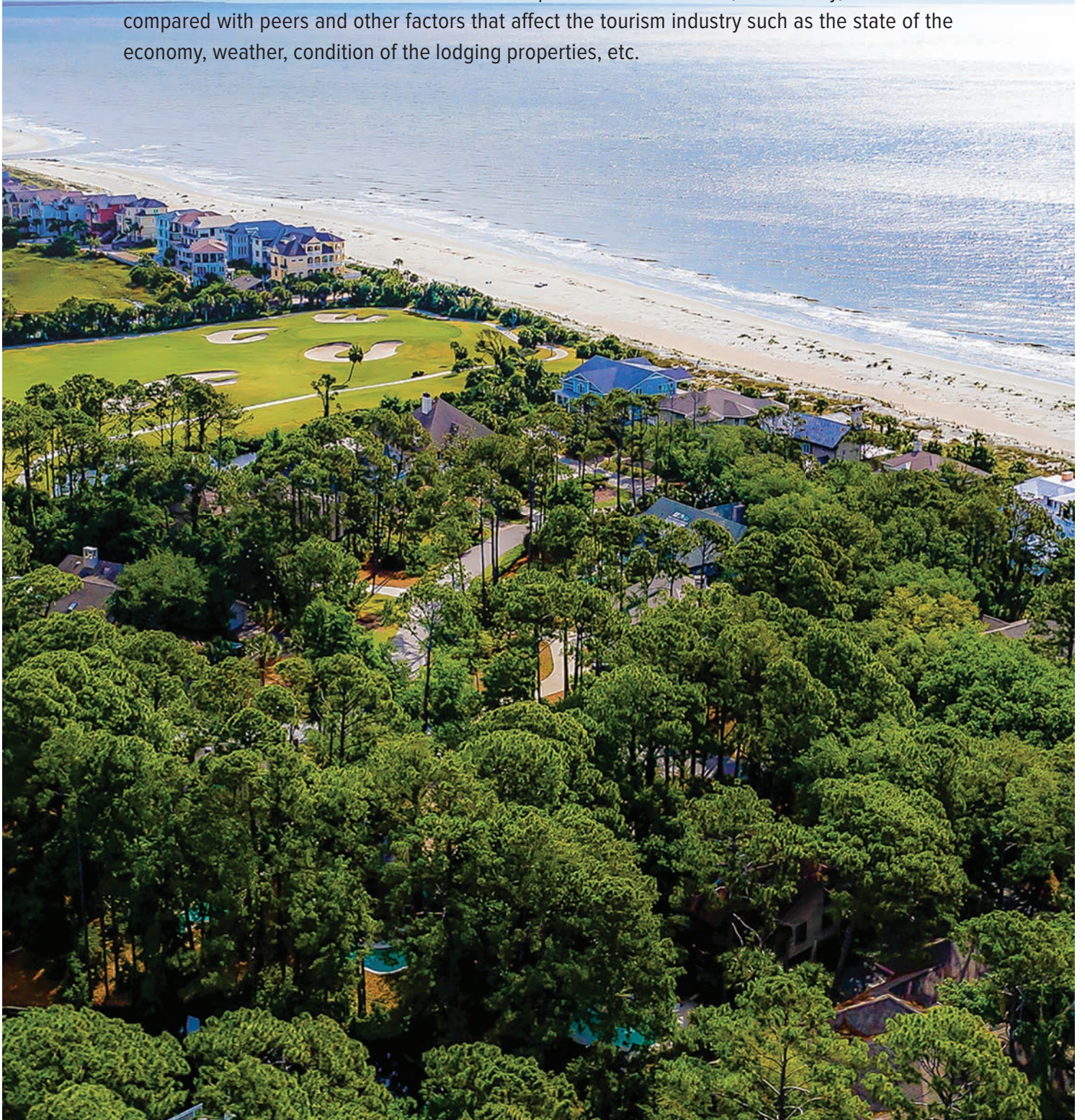


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Visitor and Resident Satisfaction Surveys

Executive Summary

As part of the official Destination Marketing Organization contract agreed upon and signed between the Town of Hilton Head Island and the Hilton Head Island-Bluffton Chamber of Commerce, we will report on resident and visitor satisfaction through annual survey results. We have an established process for both and will continue with those efforts.

Executive summaries for both surveys can be found in the appendix of this document.

- Visitor Profile Study Executive Summary, Office of Tourism Analysis, College of Charleston
- Community Sentiment Survey Executive Summary, MMGY Travel Intelligence

Revenue Per Available Room, Occupancy Rates & Average Daily Rate

Key performance indicators (KPI) to measure operating performance for the hospitality industry include Revenue Per Available Room (RevPAR), Occupancy Rate (OCC) and Average Daily Rate (ADR). In order to achieve the most accurate performance indication, these benchmarks should be analyzed together.

Revenue Per Available Room, (RevPAR), is used to gauge industry health and is calculated by dividing the total room revenue by total room supply within a specific time period.

Occupancy Rate (OCC) is another metric used within the accommodations industry to gauge the health of tourism. Occupancy percentage is calculated by dividing the occupied rooms by total room supply.

Average Daily Rate (ADR) is a metric widely used to indicate the average realized room rental per day. ADR is calculated by dividing the room revenue by the total rooms sold.

RevPar

ROOM REVENUE

ROOMS AVAILABLE

OCC

ROOMS SOLD

ROOMS AVAILABLE

ADR

ROOM REVENUE

ROOMS SOLD

Details on the next page provide 2021 performance metrics for Hilton Head Island in a two-source combined calculation that includes both home & villa and hotels as well as broken out separately for comparison. There are also additional metrics for the hotel industry that show Hilton Head Island compared against the U.S. as a whole and top competitors, Charleston and Savannah.

Home & villa numbers are based on 6,000 units/keys and could vary, as an example from a one-bedroom villa to an eight-bedroom house. The hotel numbers are based on 3,196 total hotel rooms at seventeen properties on the island.

2021 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$175.00 ↑44.9%	\$191.00 ↑36.2%	\$150.00 ↑81.9%
OCC	59.9% ↑26.9%	60.4% ↑26.2%	60.3% ↑29.9%
ADR	\$292.00 ↑14.2%	\$317.00 ↑8.0%	\$249.00 ↑40.1%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +58.1%
- Occupancy up +31%
- ADR up +20.7%

Competitor Set

Charleston

- RevPAR up +92.2%
- Occupancy up +39.1%
- ADR up +38.2%

Savannah

- RevPAR up +77.2%
- Occupancy up +35.0%
- ADR up +31.2%

Source: 2021 Inntopia DestiMetrics and 2021 Smith Travel Research Inc.

2020 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$131.00 ↑ +4.4%	\$164.00 ↑ +19.4%	\$81.59 ↓ -28.5%
OCC	47.7% ↓ -6.9%	49.0% ↑ +5.4%	47.7% ↓ -23.5%
ADR	\$275.00 ↑ +12.1%	\$335.00 ↑ +13.3%	\$171.11 ↓ -6.6%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR down -47.5%
- Occupancy down -33.3%
- ADR down -21.3%

Competitor Set

Charleston

- RevPAR down -48.6%
- Occupancy down -33.4%
- ADR down -22.8%

Savannah

- RevPAR down -42.0%
- Occupancy down -29.9%
- ADR down -17.3%

Source: 2020 Inntopia DestiMetrics and 2020 Smith Travel Research Inc.

*COVID-19

2019 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$126.00 ↑ +3.1%	\$136.00 ↑ +3.6%	\$142.31 ↑ +4.1%
OCC	51.4% ↑ +4.2%	47.0% ↑ +4.2%	63.4% ↑ +2.4%
ADR	\$246.00 ↓ -1.0%	\$290.00 ↓ -0.6%	\$224.43 ↑ +3.6%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +0.9%
- Occupancy Flat YoY
- ADR up +1.0%

Competitor Set

Charleston

- RevPAR down -2.3%
- Occupancy down -1.9%
- ADR down -0.5%

Savannah

- RevPAR 0.0%
- Occupancy down -0.9%
- ADR up +0.9%

Source: 2019 Inntopia DestiMetrics and 2019 Smith Travel Research Inc.

*Hurricane Dorian - September 2019

2018 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$127.00 ↑ +4.8%	\$129.00 ↑ +7.9%	\$110.73 ↑ +0.5%
OCC	49.7% ↓ -2.2%	44.6% ↑ +1.8%	60.4% ↓ -3.6%
ADR	\$256.00 ↑ +7.1%	\$289.00 ↑ +6.0%	\$183.29 ↑ +4.3%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +2.9%
- Occupancy up +0.5%
- ADR up +2.4%

Competitor Set

Charleston

- RevPAR down -2.4%
- Occupancy down -3.3%
- ADR up +1.0%

Savannah

- RevPAR up +0.2%
- Occupancy down -0.7%
- ADR up +0.8%

Source: 2018 Inntopia DestiMetrics and 2018 Smith Travel Research Inc.

*Winter Storm Grayson - January 2018

*Hurricane Florence - September 2018

*Hurricane Michael - October 2018

2017 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$121.00 ↑ +2.6%	\$132.00 ↑ +4.7%	\$110.19 ↑ +1.5%
OCC	52.7% ↑ +1.3%	45.4% ↑ +0.5%	62.7% ↓ -2.3%
ADR	\$230.00 ↑ +1.3%	\$290.00 ↑ +4.2%	\$175.73 ↑ +3.8%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +3.0%
- Occupancy up +0.9%
- ADR up +2.1%

Competitor Set

Charleston

- RevPAR up +4.4%
- Occupancy up +1.0%
- ADR up +3.4%

Savannah

- RevPAR up +1.6%
- Occupancy up +0.3%
- ADR up +1.3%

Source: 2017 Inntopia DestiMetrics and 2017 Smith Travel Research Inc.

*Tropical Storm Irma - September 2017

Visitor Spending Studies

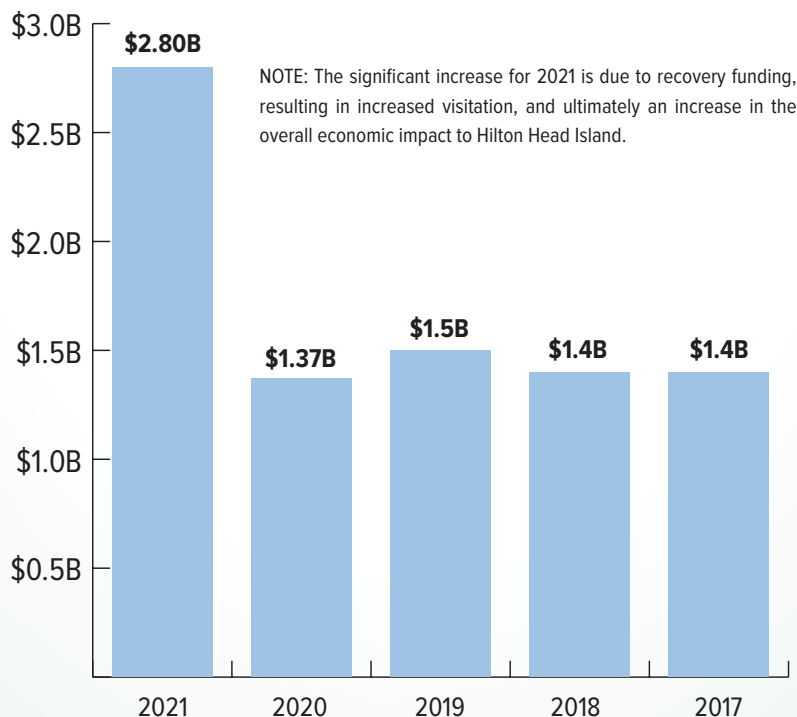
This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2021 was performed by College of Charleston School of Business, Office of Tourism Analysis.

The study examines spending by tourists classified into five segments according to their lodging arrangement while visiting the island: villa rental, timeshare, hotel, second homeowners and their non-paying guests, and finally those who visit for the day and do not lodge overnight. The estimated impact from spending by each of these groups is summed in order to indicate the total impact that tourists to the island had on Beaufort County, South Carolina.



\$2.80 BILLION

ECONOMIC IMPACT OF HILTON HEAD ISLAND TOURISM IN 2021



Source: *Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2021*

ROI for Visitor Spending Per Dollar of Investment

The Visitor & Convention Bureau is the destination marketing division of the Hilton Head Island-Bluffton Chamber of Commerce. This division works to increase tourism through its marketing efforts cultivating leisure as well as meetings and group business for Southern Beaufort County.

The marketing efforts put forth by the Visitor & Convention Bureau are delivered consistently to a well-defined target consumer set that aligns with our visitor research. This proactive and customized approach led to an increase of 19.9% in visitation compared to 2020.

FOR EVERY TAX DOLLAR INVESTED IN MARKETING



Source:

Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2021

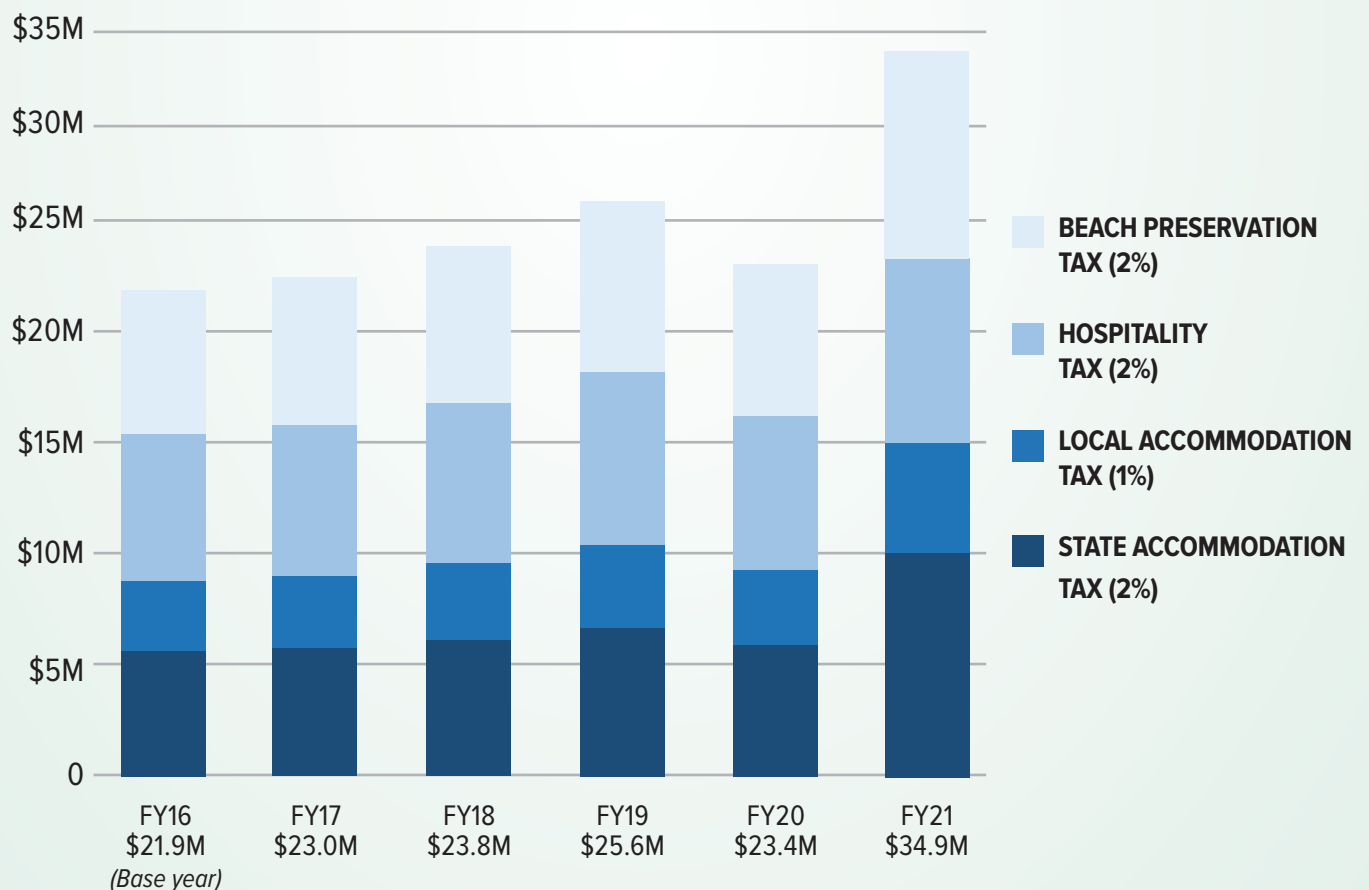
Local Tax Revenues Generated by Visitor

↑ 60%

ACCOMMODATION & HOSPITALITY TAX UP OVER 5 YEARS

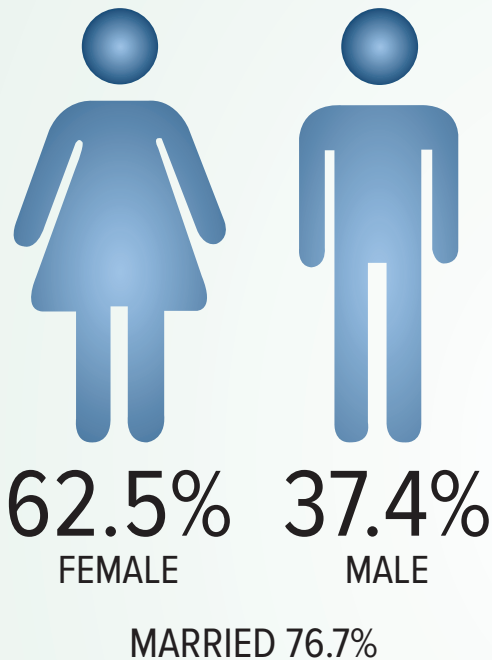
Source: Town of Hilton Head Island

TOWN OF HHI ATAX and HTAX COLLECTIONS



Number of Visitors

Based upon research gathered both locally and nationally, the Visitor & Convention Bureau is committed to attracting an affluent traveler with a household income of \$150K+. Our target visitor skews female (62.5%), and is aged 25 - 64. This traveler has an undergraduate degree or higher (56.7%) and plans to take two to four trips per year lasting an average of 7 nights per trip. Our target key regions include Northeast, Midwest and Southeast markets.



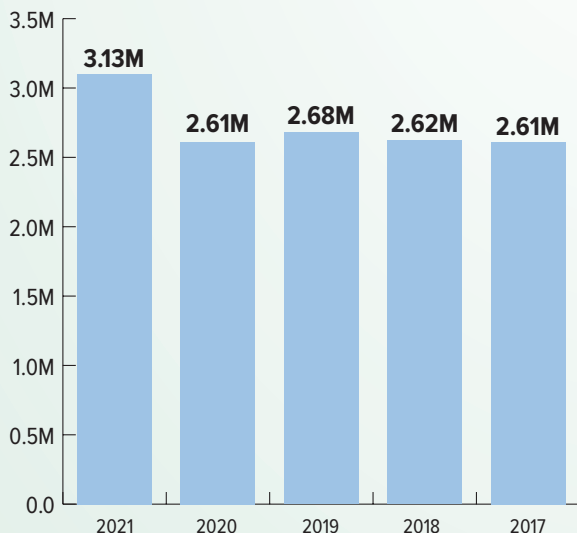
\$150K+
AFFLUENT TRAVELER



56.7%
UNDERGRADUATE
DEGREE OR HIGHER



2-4 TRIPS PER YEAR
7 NIGHTS AVERAGE
LENGTH OF STAY



3.13M
NUMBER OF
VISITORS IN 2021

Sources: 2021 Visitor Profile Study/Inntopia Destimetrics/
Smith Travel Research Inc./College of Charleston

Number of Referrals, Website Hits & Click Throughs to Area Businesses

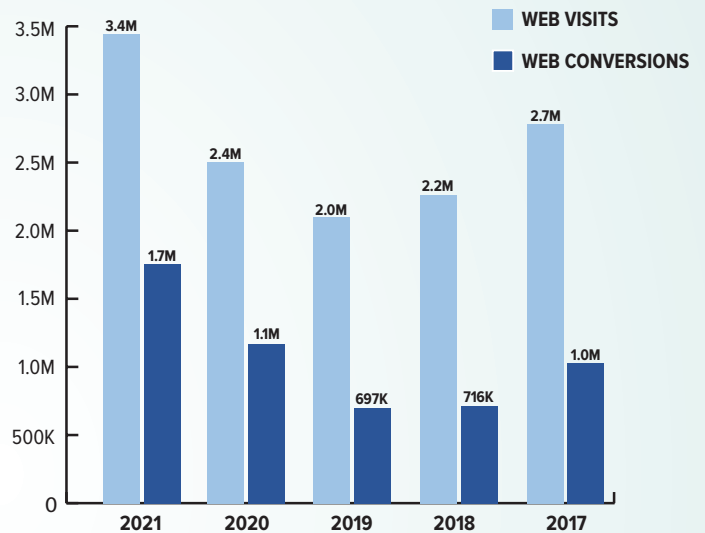
The HiltonHeadIsland.org website is our virtual storefront. The website serves as the window to our destination and plays an integral part in the decision making process. The following metrics are important key indicators of overall brand health and allows insight into visitor behavior. The insight and data taken from this platform allows for us to better serve our partners, anticipate trends, and react to consumer behavior.

3.4M

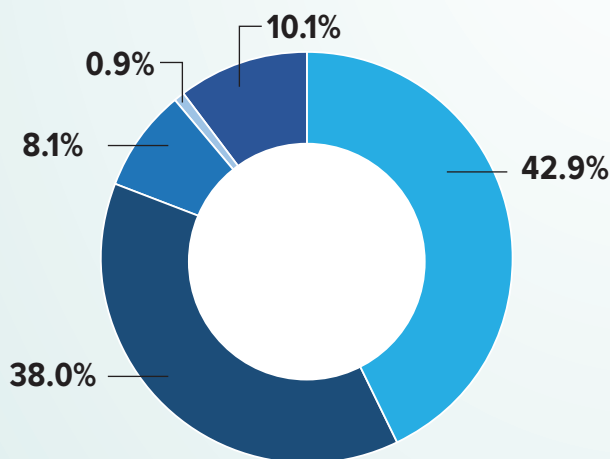
WEBSITE VISITS
IN 2021

1.7M

WEBSITE CONVERSIONS
TO PARTNERS IN 2021

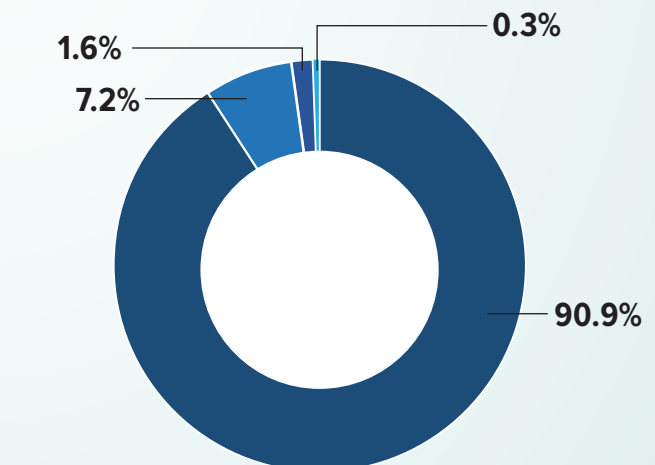


Visits by Source



■ ORGANIC SEARCH
 ■ REFERRAL
 ■ DIRECT
 ■ PAID MEDIA
 ■ OTHER

Conversion by Category



■ HHI PARTNER LINKS
 ■ DOWNLOADS AND INSIDER THANK YOU'S
 ■ GOLF PARTNER LINKS
 ■ NEWSLETTER LONG FORM SUBMIT

Source: Google Analytics and VERB Interactive

Numbers Related to Mail Fulfillment

The Hilton Head Island Vacation Planner, our comprehensive guide to help the visitor plan and envision their vacation here on Hilton Head Island, is our primary print fulfillment piece.

We receive requests for this piece from multiple platforms; online, media and home inquiries. In addition, we also distribute the planner to state and local welcome centers, airports, along with tradeshow and promotional events.

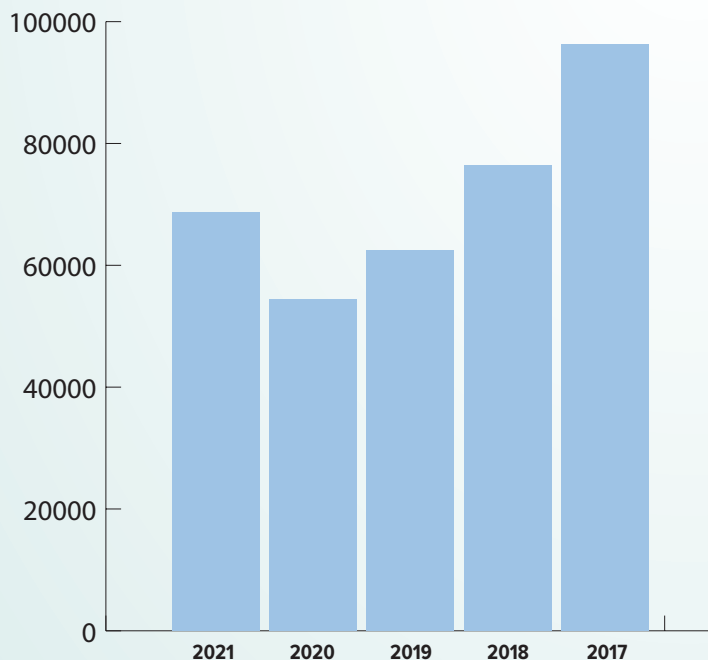
68,667

**HILTON HEAD ISLAND
VACATION PLANNERS
AND GOLF ISLAND
BROCHURES MAILED**

In today's more visual world, telling a story through stunning photography and compelling content is an imperative component to the travel journey process. The "coffee table" piece allows our visitors to visualize their vacation and discover, through this first touch point, the reason for our many accolades, ultimately imagining themselves here vacationing on Hilton Head Island.

To cater to our golf specific visitors, we offer the Hilton Head Island, Golf Island Planner. This planner can be requested through the same channels as our Vacation Planner.

The production, fulfillment and management of our Vacation Planners is a partnership between Kennickell, our fulfillment and asset inventory partner, Impact Golf and our Visitor & Convention Bureau staff.



Source: Kennickell Fulfillment/Hilton Head Island - Bluffton Chamber of Commerce

Spotlight on Accolades

America's Favorite Island®

Condé Nast Traveler

**“25 Best Island Beaches
in the World”**

Men's Journal

**“Best Places
to Live”**

Forbes.com

**“South Carolina's Hottest
Up-And-Coming
Food & Drink Destination”**

Travel Pulse

**“Top U.S. Vacation
Destinations for
Families in 2021”**

TripAdvisor

**“2021 Travelers'
Choice Best of the
Best Awards”**

Fox News

**“Top 10 family-friendly
vacation spots
in the U.S.”**

PureWow

**“25 Best Beach
Towns in America”**



Travel + Leisure
**#1 Island in the
Continental U.S.**
For the 5th Time



Condé Nast Traveler
#1 Island in the U.S.
5th Consecutive Year

MSN
**"25 Most Popular
Beaches in America"**

MSN Money
**"Best place to retire
on the East Coast"**

MCN Travel
**"America's Beautiful
Seaside Towns"**

Number of Jobs Created by Tourism

This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2021 was performed by College of Charleston School of Business, Office of Tourism Analysis.

The 36,919 jobs that comprise the estimated total employment impact generated by the five combined visitor segments in 2021 represent 34.1% of all jobs in Beaufort County.

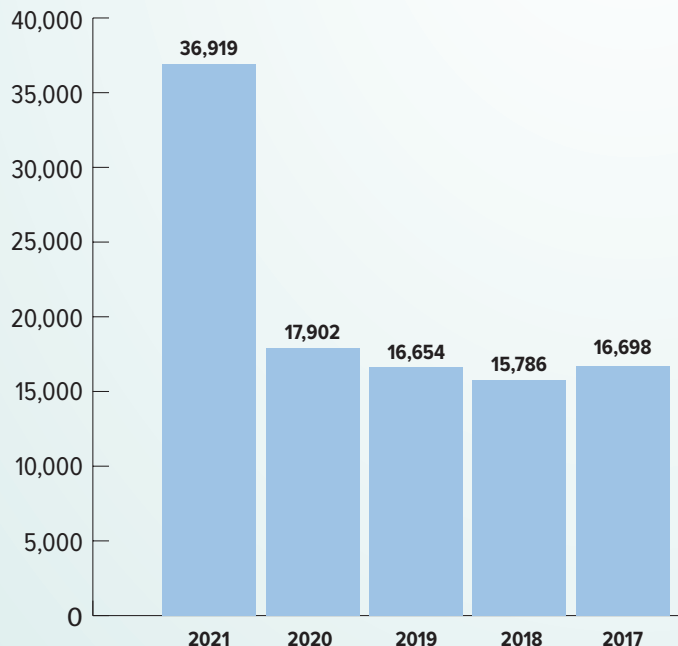
36,919 JOBS

GENERATED FROM
HILTON HEAD ISLAND TOURISM

TOURISM ON HHI
NOW ACCOUNTS FOR

34.1%

OF ALL JOBS IN
BEAUFORT COUNTY



*Source: Estimated Total Impact of
Tourism In Hilton Head Island On
Beaufort County, South Carolina 2021*

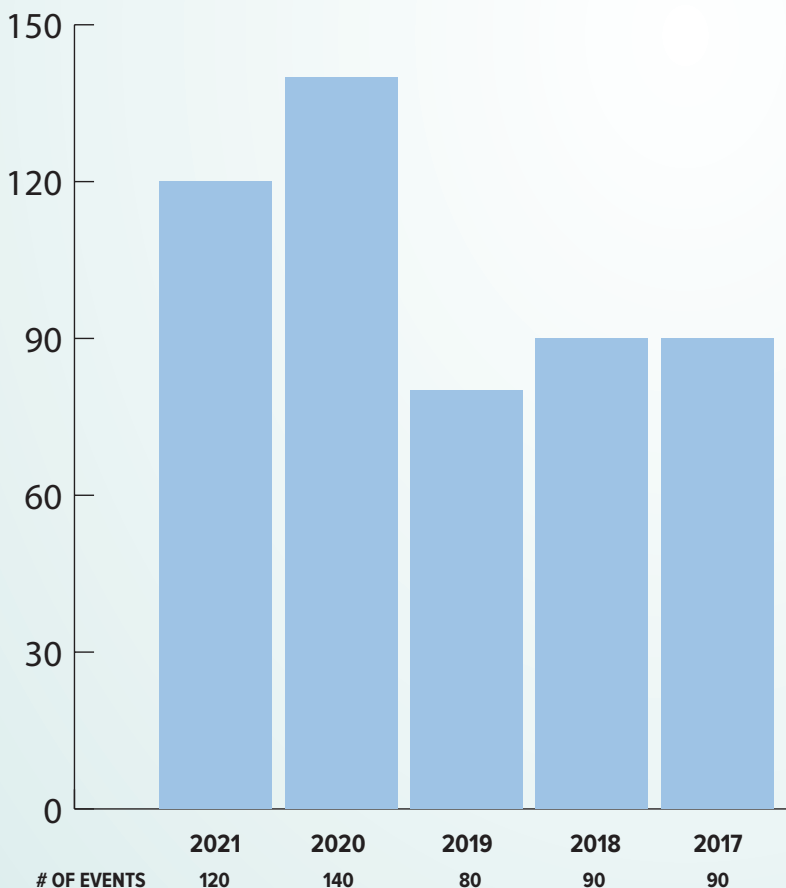
**The number of jobs generated are based on economic
activity within different sectors of tourism. (e.g. airlines, car
rentals, coach services, etc)*

Networking Events, Workshops and Member/Community Events

The chamber continued to connect our membership and community, and helped them learn, grow, and navigate the Covid-19 pandemic. In 2021, we returned to in-person events including ribbon cuttings, Conversation + Cocktails, Executive Connection, Chamber Young Professionals, and more. Together we celebrated 50 ribbon cuttings and groundbreaking ceremonies along with 70 in-person and virtual networking, learning seminars and meetings, reaching 10,000 people.

70⁺ IN PERSON + VIRTUAL
CHAMBER EVENTS

50⁺ RIBBON CUTTINGS
& GROUNDBREAKING
CEREMONIES



2021 EVENTS

JANUARY

01/07/2021

Chamber Coffee Chat

[Virtual](#)

01/08/2021

Ribbon Cutting Maggie & Me

[Bluffton](#)

01/13/2021

Tele Town Hall

[Virtual](#)

01/15/2021

Ribbon Cutting: HHCA

[Bluffton](#)

01/27/2021

Tele Town Hall

[Virtual](#)

Get Smart Series: Mission & Vision

[Hybrid - Chamber and Zoom](#)

FEBRUARY

02/03/2021

Ribbon Cutting: Heritage Academy

[HHI](#)

02/04/2021

Chamber Coffee Chat

[Virtual](#)

02/05/2021

Public Policy Meeting

[Virtual](#)

Ribbon Cutting

[Blue Laguna](#)

02/10/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

Get Smart Series:
Advocacy in Action
[Virtual](#)

02/24/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

MARCH

03/10/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

03/22/2021
Chamber Business Golf Classic
[Golf Club at Indigo Run](#)

03/24/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

03/25/2021
Coffee & Counsel
[Virtual](#)

Conversation + Cocktails
[Palmera Inn & Suites](#)

03/30/2021
Get Smart Series: Are you
Inclusive?
[Virtual](#)

APRIL

04/01/2021
Chamber Coffee Chat
[Virtual](#)

04/07/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

Plaid Par-Tee
[Driftwood Eatery](#)

04/08/2021
Leadership Program
Informational Coffee
[Virtual](#)

04/21/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

04/22/2021
Chamber in the Community
Earth Day Beach Clean Up
[Folly Field](#)

Leadership Program
Informational Happy Hour
[Virtual](#)

04/28/2021
State of the Region
[Virtual](#)

Chamber Young Professionals
[lot 9 brewing co.](#)

04/29/2021
Coffee & Counsel
[Virtual](#)

MAY

05/05/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

05/10/2021
Pork in the Parking Lot
[Chamber Headquarters](#)

05/11/2021
Effective Social Media
Campaigns
[Chamber Headquarters / Virtual](#)

05/12/2021
Bluffton Block Party
[Hewitt Oaks](#)

05/17/2021
Southwest Business Event
[Montage Palmetto Bluff](#)

05/18/2021
Jr. Leadership Graduation
[Shelter Cove Harbour & Marina](#)

05/19/2021
Chamber Power Hour / Tele
Town Hall
[Virtual](#)

Chamber Champion
Reception
[Harsta Home - Bluffton](#)

JUNE

06/03/2021
Chamber Coffee Chat
[Virtual](#)

06/10/2021
Executive Connection
[Court Atkins Group](#)

06/24/2021
Conversation + Cocktails
[Lucky Rooster](#)

JULY

07/21/2021
Chamber Young Professionals
at Palmetto Axes
[Bluffton](#)

07/29/2021
Coffee & Counsel with
Burr + Forman
[Virtual](#)

AUGUST

08/12/2021
Conversation + Cocktails
[Tio's Bluffton](#)

08/19/2021
Chamber Young Professionals
[Chronic Golf](#)

SEPTEMBER

09/01/2021
Chamber Power Hour/
Tele Town Hall
[Virtual](#)

Executive Connection

[Whisper Creek Spa](#)

09/03/2021

Public Policy Meeting

[Virtual](#)

09/07/2021

Business Education Partnership

[HHI](#)

09/16/2021

SC Chamber Grassroots Meeting

[Palmera Inn & Suites](#)

09/23/2021

Conversation + Cocktails

[The Market Cafe at Michael Anthony's](#)

09/28/2021

Chamber Young Professionals

[Joe's Ice Cream & Beverage](#)

09/30/2021

Coffee & Counsel with Burr + Forman

[Virtual](#)

OCTOBER

10/01/2021

Public Policy Meeting

[Virtual](#)

10/05/2021

Business Education Partnership

[HHI](#)

10/06/2021

Chamber Power Hour/Tele Town Hall

[Virtual](#)

10/20/2021

Coffee & Counsel with Burr + Forman

[Virtual](#)

Bluffton Regional Business Council

[Bluffton](#)

10/21/2021

Conversation + Cocktails

[Hargray Bluffton](#)

10/27/2021

Chamber Power Hour/Tele Town Hall

[Virtual](#)

10/28/2021

Chamber Young Professionals

[Max Pour House](#)

NOVEMBER

11/02/2021

Business Education Partnership

[Hybrid](#)

11/04/2021

Lowcountry Speaker Series: Robert O'Neill

[The Sea Pines Resort](#)

11/05/2021

Public Policy

[Hybrid](#)

11/18/2021

Conversation + Cocktails

[High Tide Rooftop Bar at Courtyard by Marriott](#)

DECEMBER

12/01/2021

Chamber Power Hour/Tele Town Hall

[Virtual](#)

12/03/2021

Public Policy

[Virtual](#)

12/07/2021

Business Education Partnership

[Hybrid](#)

12/08/2021

Bluffton Regional Business Council

[Bluffton](#)

12/09/2021

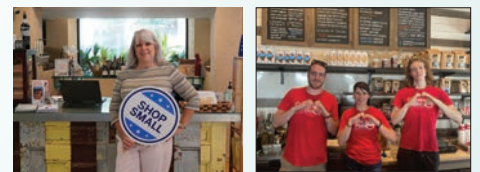
Sparkles & Spirits

[Burnt Church Distillery](#)

12/15/2021

Chamber Power Hour/Tele Town Hall

[Virtual](#)



Media Impressions and the Dollar Equivalent

The communications team tracks all print, digital and broadcast mentions and stories about Hilton Head Island. Hosting visiting journalist and social influencers, meeting with editors of some of the nation's top-tier publications, working with broadcast crews and actively pitching story ideas about the destination are all part of the chamber's daily public relations outreach efforts in partnership with Weber Shandwick, one of the world's leading travel public relations firms.

2,316

STORIES & MENTIONS

13,269,706,385

MEDIA IMPRESSIONS

\$11,729,825.10

AD EQUIVALENCY

Source: Weber Shandwick and includes all print, online and broadcast media

2021

Stories & Mentions

2,316

Impressions

13,269,706,385

Ad Value

\$11,729,825.10

2020

Stories & Mentions

1,866

Impressions

8,129,666,977

Ad Value

\$19,015,478.70

2019

Stories & Mentions

3,751

Impressions

6,900,983,718

Ad Value

\$21,947,349.50

2018

Stories & Mentions

1,630

Impressions

1,829,828,359

Ad Value

\$21,992,361.71

2017

Stories & Mentions

2,198

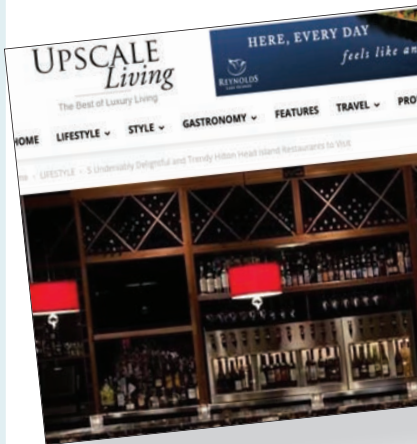
Impressions

2,881,803,723

Ad Value

\$29,655,138

COVERAGE HIGHLIGHTS



10 Most Unique Restaurants in America — Eat This Not That



10 Island Vacations You Can Take Without Leaving the Country

By: Lindsey Cohen May 27, 2021
Additional reporting by Hannah Lovewell

We love jetting off to an idyllic island for the week. But the whole standing in line at customs thing? Not so much. Our solution for satisfying that sense of wanderlust that doesn't include dealing with all the hoops of an international trip? Well, it's simple. Plan a low-maintenance vacation to one of these ten dreamy islands in the United States. You don't even need an adapter doodad for your hairdryer (or a passport, for that matter).

RELATED: THE 15 MOST GORGEOUS, SECLUDED AND TOTALLY HIDDEN BEACHES IN THE U.S.



7 reasons why your next vacation should be on Hilton Head Island

Nick Ellis
May 15, 2021

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Editor's note: This is a recurring post and has been updated with new information published on Sept. 28, 2020.

For years, Hilton Head Island — located in South Carolina's for travelers from all over the country. Ninety miles south of for lovely weather, a relaxed lifestyle, 12 miles of beach on cuisine, rich history and over 60 miles of leisure pathways for anyone in need of a vacation.

For more TPG news delivered each morning to your inbox,

4 road trips you can take from Charlotte, North Carolina

Madison Blomquist
Sep 28, 2021

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Editor's note: This post has been updated with new information.

There is a lot to love about Charlotte, North Carolina. While I no longer live there, I was always finding new hidden gems when I did call the city home.

Now that fall is officially here, there are many great road trips worth taking to experience fall foliage and/or enjoy the cooler temps that come in September through November. Today, I'm walking through four underrated spots within a four-hour drive from Charlotte.

Want more travel tips from TPG? Sign up for our daily newsletter.

The Best Touristy Towns To Own Rental Property

Jami Farkas
June 25, 2021 · 4 min read



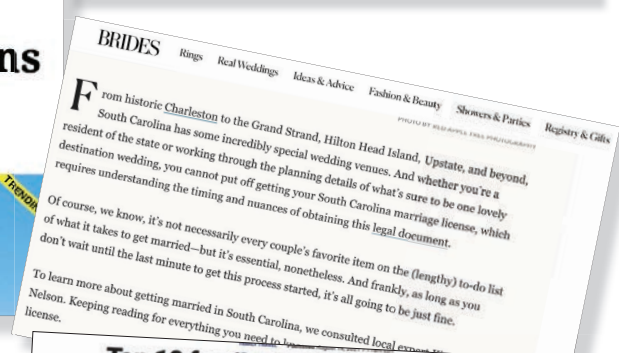
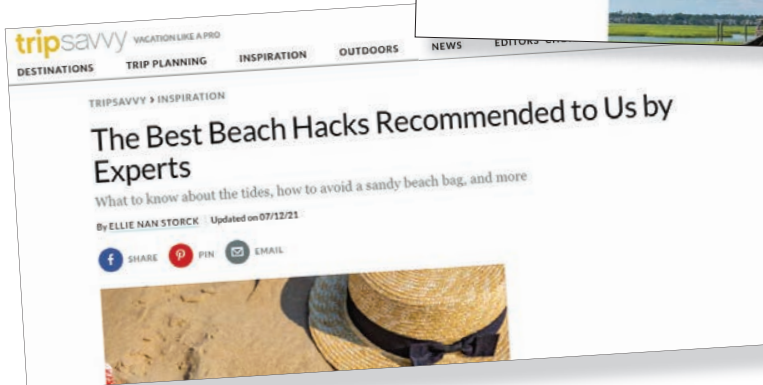
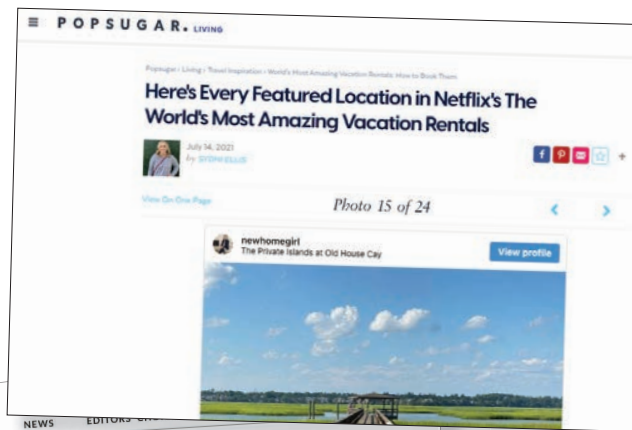
Imagine owning a rental property that generates a constant stream of passive income because it's in so much demand with tourists. This can become your reality if you decide to buy property in a town that offers popular local attractions, such as adventurous theme parks, plentiful wineries or majestic mountains.

Top US Vacation Destinations for Families in 2021

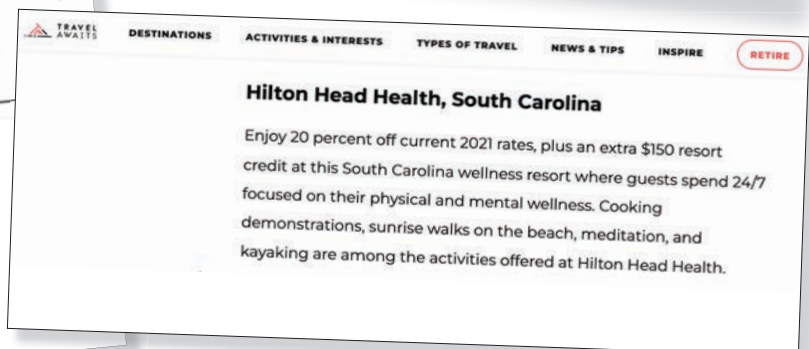
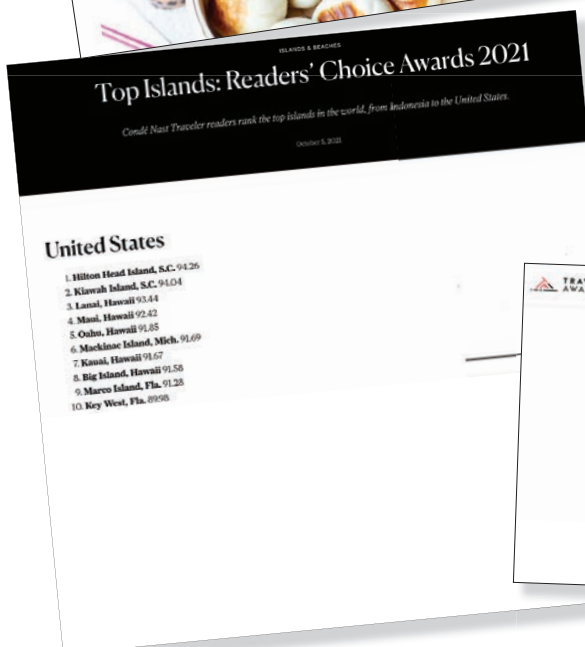
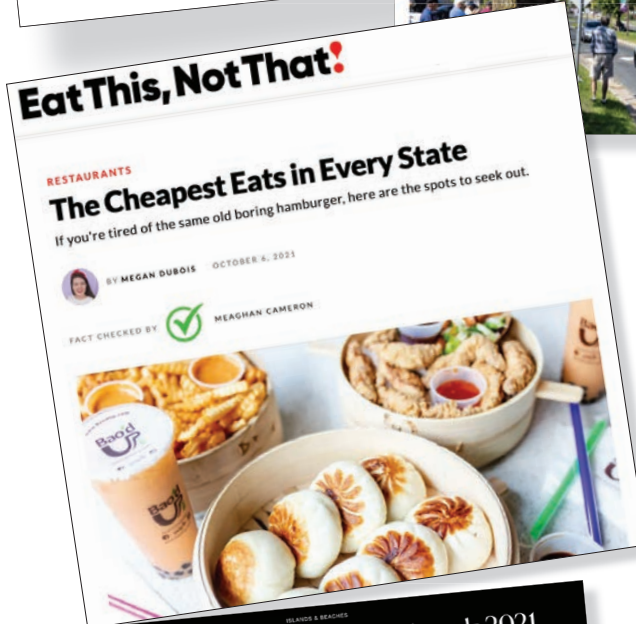
FEATURES & ADVICE | JANEEN CHRISTOFF | JUNE 25, 2021



COVERAGE HIGHLIGHTS



COVERAGE HIGHLIGHTS



COVERAGE HIGHLIGHTS

Evolving the Travel Industry: Talking Change at Condé Nast Traveler's Point of View Summit

The pandemic has been hugely disruptive to the travel industry—but it has offered a chance to see

BY BETSY BLUMENTHAL

November 17, 2021

Southern Living

SOUTHERN LIVING • TRAVEL • SOUTH CAROLINA

Live Camera Invites Viewers Into Lives of Nesting Bald Eagle Couple on Hilton Head Island

The best kind of reality television.

By Meghan Overdeep

Updated November 24, 2021

TRAVEL+LEISURE

Home + Hotels + Resorts

5 Best Family-friendly Hotels on Hilton Head Island

Whether you're planning your first multi-generational trip or Hilton Head Island is your longtime family vacation tradition, here's where to stay to keep everyone happy.



By Sucheta Rawal

Updated December 23, 2021

FOOD & WINE

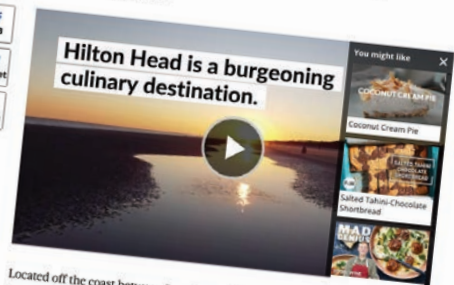
HOME > TRAVEL

A Culinary Tour of Hilton Head Island

How to eat your way through South Carolina's favorite Lowcountry getaway.

By Stephanie Burr

December 28, 2021



Located off the coast between Beaufort and Bluffton in the South Carolina Lowcountry, Hilton Head Island is a salty sea breeze getaway where wide beaches beckon, there are no bright street lights or vivid colors, and the buildings are often nestled in among the native live oak trees. Incorporated as a town in 1987, Hilton Head Island has been welcoming vacation travelers for

THE MANUAL

MEN'S STYLE MEN'S GROOMING FOOD AND DRINK CULTURE FITNESS OUTDOORS

CONTENTS

How to Make Eggnog

Eggnog Cocktail Recipes



(By [Lucy Rooster Kitchen + Bar](#), Hilton Head, South Carolina)

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TRAVEL

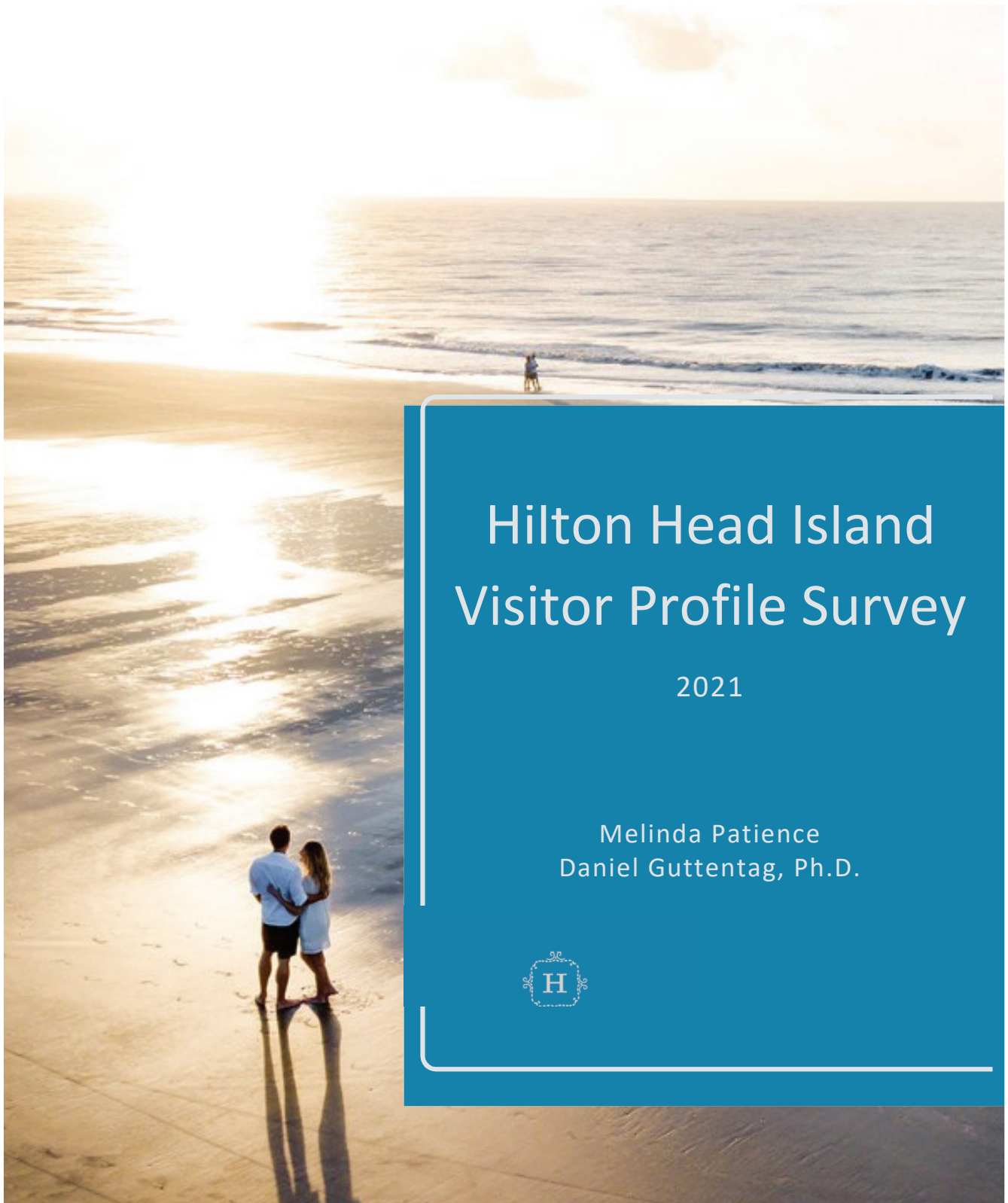
7 must-visit restaurants for superb Southern cuisine

By LESLIE E. ROYAL

CHICAGO TRIBUNE | DEC 02, 2021 AT 5:00 AM



Appendix



Hilton Head Island Visitor Profile Survey

2021

Melinda Patience
Daniel Guttentag, Ph.D.



PREPARED FOR:

HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

BY:

OFFICE OF TOURISM ANALYSIS
SCHOOL OF BUSINESS
COLLEGE OF CHARLESTON

66 GEORGE STREET | CHARLESTON, SC 29424
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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Baby Boomers represented 49.9% of the respondents, followed by Gen X (22.0%), and then Millennials (21.8%). Over 56% of those surveyed had a Bachelor's degree or higher, and more than 50% had an annual household income of \$100,000 or more per year. Also, just over three-fourths of the respondents were married. Based on a comparison with the prior survey, these characteristics suggest a trend towards younger travelers visiting the area.

POINT OF ORIGIN

The respondents resided in 380 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the US, stretching from east to west coast. More respondents resided in Ohio than any other state (11.3%). Second was Pennsylvania (7.1%), followed then by New York (6.2%), Georgia (5.9%), North Carolina and California (4.7% each), Florida (4.0%), and then Virginia (3.8%). In-state visitors did not make up a significantly large portion of the respondents (3.3%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ-PA; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Pittsburgh, PA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Cleveland-Elyria, OH; Los Angeles-Long Beach-Anaheim, CA; and Cincinnati, OH-KY-IN.

Canada remains the top international origin market amongst respondents (49.3%), followed by Europe (17.3%) and Asia (9.3%).

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (75.4%), relaxation (51.5%), and spending time with family (46.6%), followed by biking (16.4%), golf (13.7%), and culinary experiences (12.2%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include shopping, nature-based activities, and water excursions.

Of those surveyed, 38.5% of overnight visitors and 57.8% of day trip visitors indicated they had visited Hilton Head Island, SC for the first time, suggesting that the destination continues to appeal to new visitors.

TRIP CHARACTERISTICS

The average group size of those surveyed was 3.8 for overnight visitors and 2.1 for day trip visitors. The main mode of transportation to the island continues to be personal/family car (67.6%). However, flying into the destination increased notably from the prior survey (19.5% to 25.5%), with the proportion of visitors flying into Hilton Head Island Airport rising substantially (12.8% to 39.8%).

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.9 nights, hotel visitors stayed 5.5 nights, timeshare visitors stayed 8.3 nights, and second homeowners stayed 10.4 nights. The overall average was 6.7 nights.

Home/villa rental continues to be the most popular choice of accommodation for overnight visitors (37.2%), followed by resorts (20.9%), hotels (15.0%), timeshares (14.2%), and second homes (4.3%).



TRAVEL PLANNING

VRBO remains by far the most popular online booking platform for villas/homes (34.2%), followed by local vacation rental companies (22.9%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (15.1%). The percentage of respondents booking via Airbnb increased significantly from the prior survey (2.4% to 10.0%).

Other destinations like the Outer Banks, NC; Myrtle Beach, SC; and Gulf Shores, AL remain competitors for Hilton Head Island as alternative beach destinations. The top competing city market was Charleston, SC.

Top reasons for choosing to visit Hilton Head Island were previous visitation (60.0%), beach destination (49.7%), word-of-mouth/recommendation (24.1%), within driving distance of home (23.9%), and wanting to visit somewhere safe during/after COVID-19 (19.0%).

Of those visitors surveyed, 89.3% indicated an intention to return to visit Hilton Head Island.

NON-VISITORS

Of those who indicated not to have traveled at all or not to have traveled to the Hilton Head Island / Bluffton area in the past 12 months (N=860), just 38.6% had never visited the Hilton Head Island / Bluffton area before, and 48.8% had visited one to five times before.

Of those non-visitors, 37.6% traveled elsewhere, 2.9% found it too expensive, 2.0% mentioned health reasons, 2.0% were hesitant because of unpredictable weather events, 1.5% did not travel at all, and 0.9% did not find what they were looking for. Over 26% stated the COVID-19 pandemic kept them from visiting the Hilton Head Island / Bluffton area. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (26.9%) and Midwest (10.5%) were the most popular. Nonetheless, 49% of the non-visitors indicated they had plans to visit the Hilton Head Island / Bluffton area within one year.

TRAVEL BEHAVIOR

Looking at the travel behavior of both visitors and non-visitors together, the majority (56.6%) take two to four leisure/vacation trips per year, and they are most likely to travel between May and October.

The top five most appealing experiences for leisure trips/vacation were: beaches (91.3%), relaxation & rejuvenation (88.8%), passive outdoor adventures (76.7%), historical attractions (73.7%), and romantic couple-getaways (70.6%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (92.7%), ease of access (89.0%), quality of lodging and dining options (89.1% and 88.6%), affordability (87.6%), diversity of dining and lodging options (84.9% and 70.8%), and low traffic congestion (69.3%).





METHODOLOGY

The 2021 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between June 2021 and January 2022, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited www.hiltonheadisland.org or www.visitbluffton.org and submitted their email addresses, and they were generally contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted in January 2022 on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,084 completed surveys were collected. This report is based largely on the 1,040 respondents who visited Hilton Head Island as an overnight or day trip, along with individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton.

This report presents the results of the present study, together with comparative results from the last time this study was completed, in 2020. Because the prior (2020) report looked at visitation that occurred primarily in 2019, such results are labelled as “2019” throughout this report, rather than as “2020,” which is how they were labelled in the prior report. Likewise, the data from the current survey are labelled as 2021 because the vast majority of these respondents visited in 2021. When 2019 data is not presented, it is because the question was not asked in the previous survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2019 and 2021. The estimates are based on secondary data for hotel, timeshare, and villa visitors, as well as primary data collected regarding second homeowners, their guests, and day trippers.

Visitor Segment	2019	2021	Change (%)
Villa/Home Rentals	755,953	962,686	27.3%
Hotels/Resorts	473,679	508,977	7.5%
Timeshares	454,093	481,934	6.1%
Second Homeowners	613,216	719,302	17.3%
Non-paying Guests	159,137	186,667	17.3%
Day trippers	228,250	267,290	17.1%
Total Visitors	2,684,328	3,126,856	16.5%

Table 1: Visitor Estimates for 2019 and 2021



***Community Sentiment Survey
Executive Summary,
MMGY Travel Intelligence***

COMMUNITY PERSPECTIVES

RESIDENT SENTIMENT STUDY

JULY 2021



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



Travel Intelligence

SURVEY METHODOLOGY



Travel Intelligence

SURVEY METHODOLOGY

- MMGY Travel Intelligence conducted an online survey of 2,979 Hilton Head Island residents
- Residents were invited to complete the online survey through the Hilton Head Island website, social media sites, and email outreach.
- The survey was fielded June 14, 2021 – June 25, 2021. Data were tabulated and analyzed by MMGY Travel Intelligence.
- The participants met the following criteria:
 - ✓ Must be a resident or property owner of Hilton Head Island;
 - ✓ 18 years of age or older.



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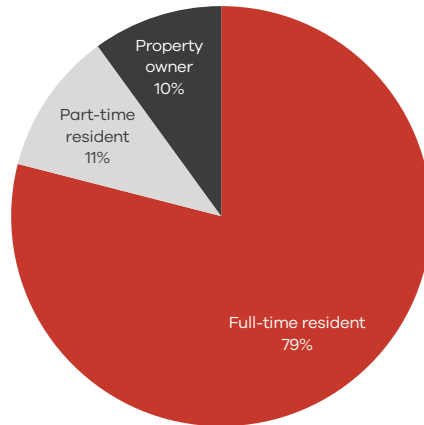
This sample size yields an error range of ± 1.7 percentage points at the 95% level of confidence. This means that if the survey was to be replicated 100 times, we would expect the results to vary by no more than 1.7 percentage points 95 of those times.

RESPONDENT DEMOGRAPHICS



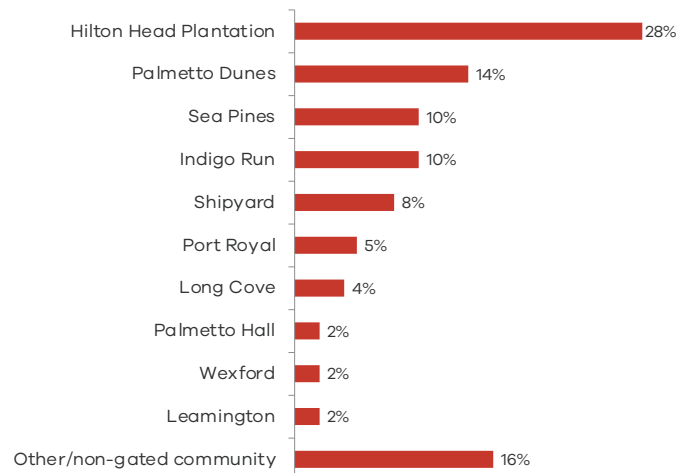
DEMOGRAPHICS

Type of Residency/Ownership on Hilton Head Island



DEMOGRAPHICS

Hilton Head Communities

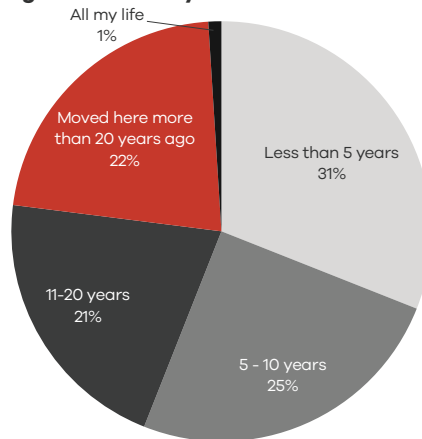


DEMOGRAPHICS

Zip Codes	Total Respondents
29926	1351
29928	1287
29910	24
29909	7
29925	6
30350	6
29588	5

DEMOGRAPHICS

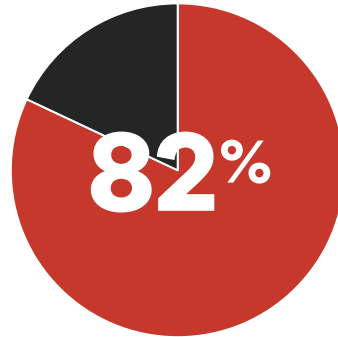
Length of Residency on Hilton Head Island



DEMOGRAPHICS



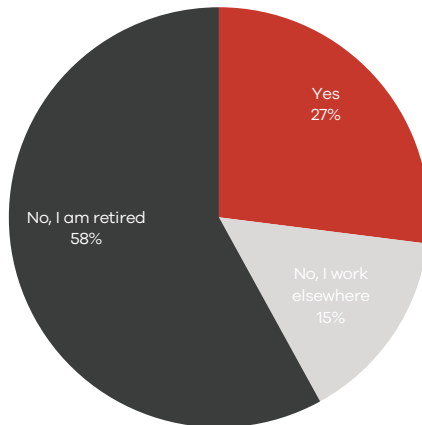
% OF RESIDENTS WHO WERE VISITORS BEFORE MOVING TO/PURCHASING PROPERTY ON HILTON HEAD ISLAND



Were you a visitor before you moved to/purchased property on Hilton Head Island?

DEMOGRAPHICS

Do you currently work on Hilton Head Island?



MMGY Travel Intelligence

- 10 -

Do you currently work on Hilton Head Island?

DEMOGRAPHICS

Total Respondents	
Gender	
Female	58%
Male	42%
Self-identify	0%
Household Income	
Less than \$30,000	0%
\$30,000 - \$49,999	3%
\$50,000 - \$99,999	12%
\$100,000 - \$149,999	16%
\$150,000 - \$249,999	19%
\$250,000 or more	20%
Prefer not to answer	30%

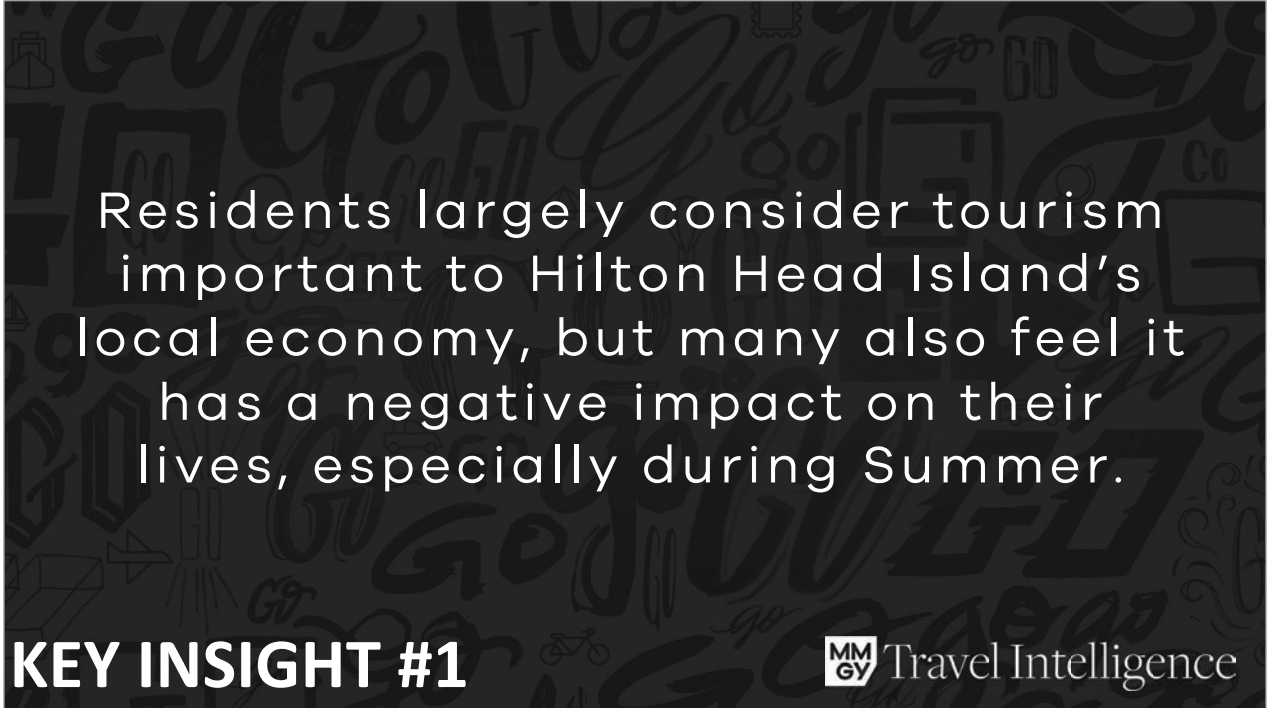
DEMOGRAPHICS

Total Respondents	
Level of Education	
Less than 4 years of high school	0%
4 years of high school	4%
1-3 years of college	13%
4 years of college	39%
Graduate school or more	43%
Children under 18 in household	11%



KEY INSIGHT #1

 Travel Intelligence



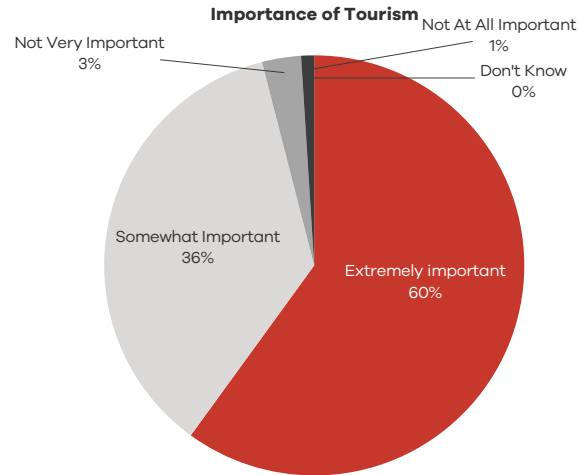
Residents largely consider tourism important to Hilton Head Island's local economy, but many also feel it has a negative impact on their lives, especially during Summer.

KEY INSIGHT #1

 Travel Intelligence

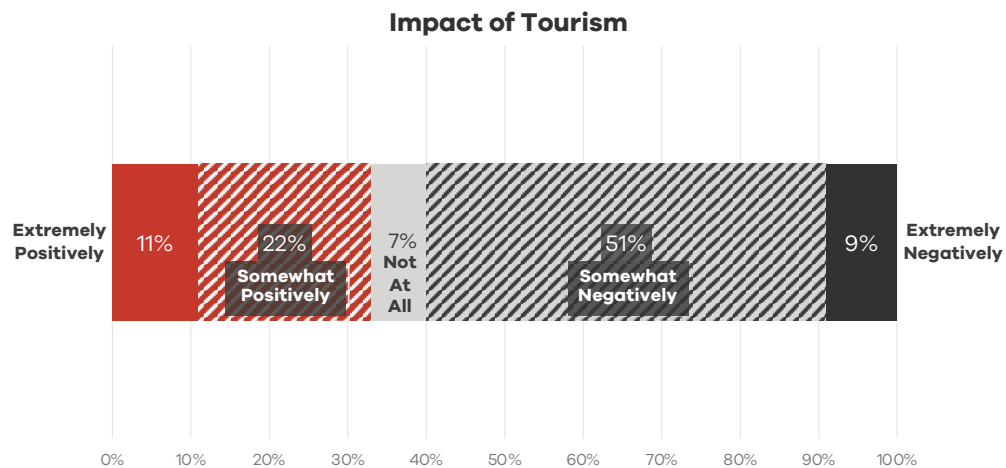
KEY INSIGHT #1

Six in ten residents believe tourism is extremely important to Hilton Head Island's local economy, while only 4 percent believe it is not very important or not important at all.



KEY INSIGHT #1

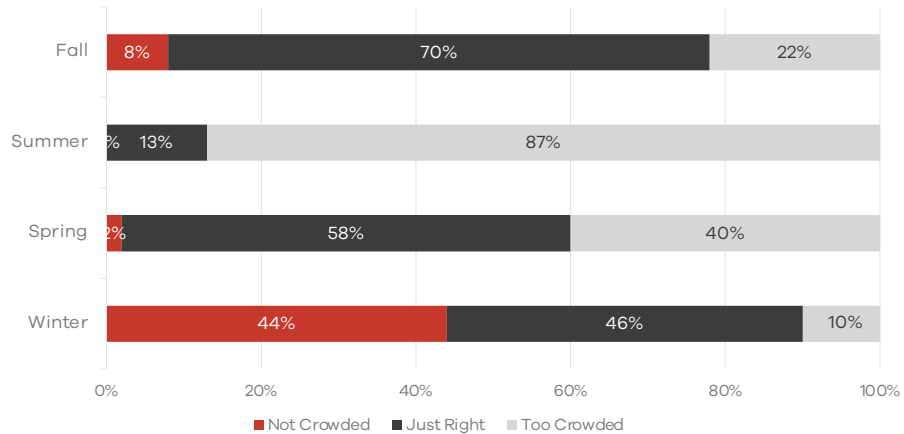
One-third of residents feel that tourism impacts their life at least somewhat positively, while six in ten feel it has at least a somewhat negative impact.



KEY INSIGHT #1

Summer is considered to be “too crowded” by nine in ten residents, while seven in ten feel Fall is “just right” and six in ten feel Spring is “just right”. Winter is the considered both “just right” and “not crowded” by more than four in ten residents.

Seasonal Perceptions



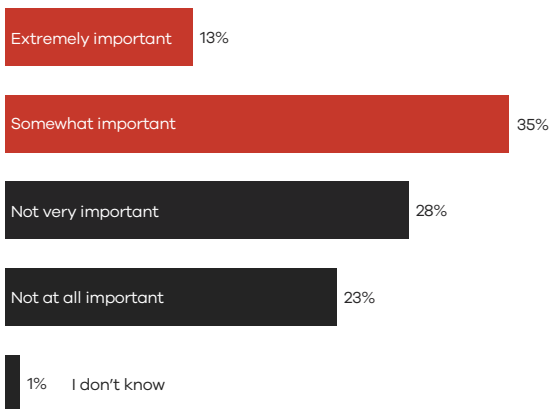
MMGY Travel Intelligence

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Please indicate your perception of the level of visitation during the following seasons.

KEY INSIGHT #1

IMPORTANCE OF ATTRACTING VISITORS TO HILTON HEAD ISLAND DURING TIMES OF YEAR WITH LOW VISITATION



Please indicate how important you believe it is to attract visitors to Hilton Head Island during times of the year that usually have lower visitation (November – April).

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KEY INSIGHT #1



IMPORTANCE OF HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE EDUCATING VISITORS HOW TO RESPECT THE LOCAL ENVIRONMENT AND NATURAL RESOURCES WHEN VISITING

Extremely important 83%

13% Somewhat important

2% Not very important

1% Not at all important

1% I don't know

In your view, how important is it for Hilton Head Island-Bluffton Chamber of Commerce to educate visitors about how to respect the local environment and natural resources when they visit?

KEY INSIGHT #1

TYPE OF IMPACT HOSTING MARQUEE EVENTS AND FESTIVALS HAS ON RESIDENTS AND VISITORS

Extremely positive impact 27%

Somewhat positive impact 43%

Neither positive nor negative impact 18%

9% Somewhat negative impact

2% Extremely negative impact

One of the Hilton Head Island-Bluffton Chamber of Commerce's objectives is to promote marquee events and festivals. Please indicate the type of impact you believe these activities have on the quality of life for local residents and visitors.

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KEY INSIGHT #1

Total Respondents	
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in educating visitors about how to be responsible in protecting and preserving our natural resources when visiting Hilton Head Island	87%
I support efforts by our town in the funding and installation of local public art, exhibits, and cultural attractions	67%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in promoting attractions, festivals, exhibits and similar on Hilton Head Island	57%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in branding and marketing Hilton Head Island for tourism	47%

KEY INSIGHT #2

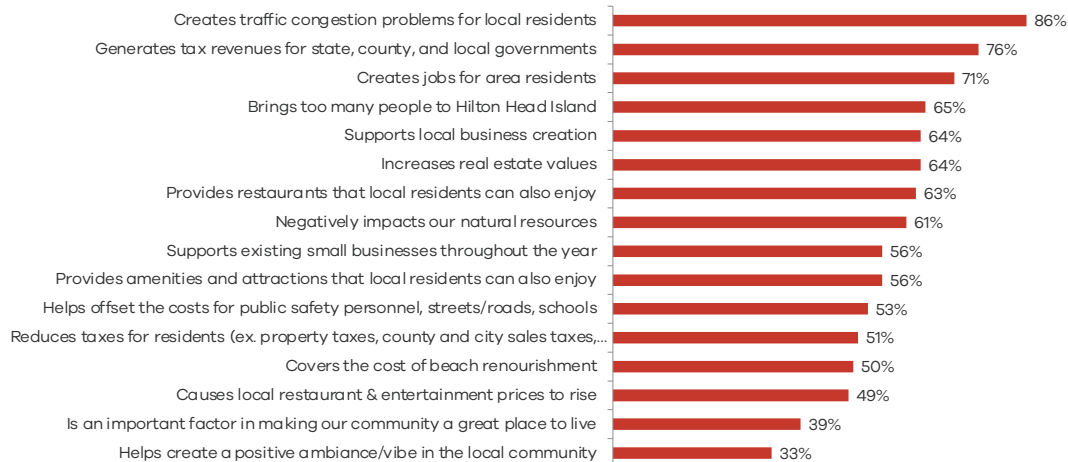
While residents tend to be knowledgeable about tourism and its benefits, opportunities exist to further educate residents on tourism's impact on their lives and their finances.

KEY INSIGHT #2

MMGY Travel Intelligence

KEY INSIGHT #2

Tourism on Hilton Head Island...



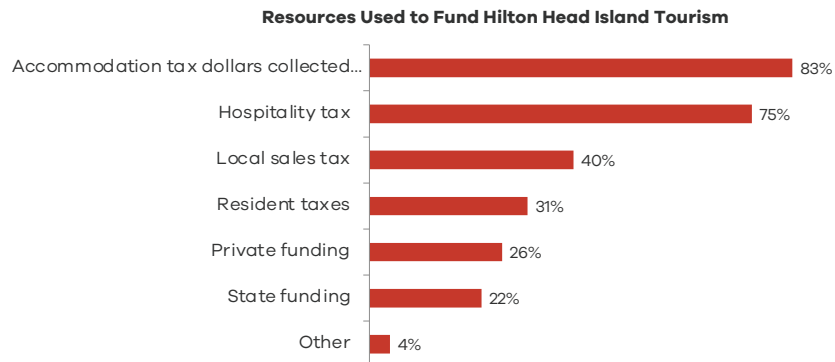
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Please indicate your level of agreement with the following statements.

KEY INSIGHT #2

24% Of Hilton Head Island Residents say they don't know what resources fund the Hilton Head Island-Bluffton Chamber of Commerce



MMGY Travel Intelligence

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Which of the following resources do you believe funds the Hilton Head Island-Bluffton Chamber of Commerce tourism marketing efforts? Please select all that apply. (n=2,264 those who gave an answer other than Don't Know)

KEY INSIGHT #3

MMGY Travel Intelligence

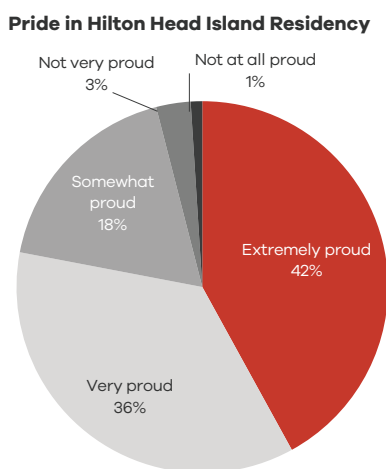
Nearly all residents feel pride in being Hilton Head Island residents and feel it offers high-quality experiences, dining, and shopping.

KEY INSIGHT #3

MMGY Travel Intelligence

KEY INSIGHT #3

Three-quarters of Hilton Head Island residents are extremely or very proud to be Hilton Head Island residents, while one quarter are at least somewhat proud to be residents.



MMGY Travel Intelligence

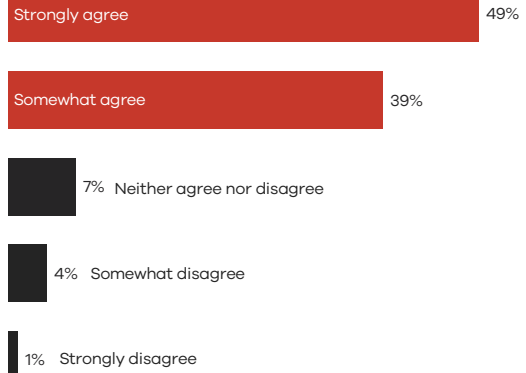
- 28 -

Please indicate the level of pride you feel in being a resident of Hilton Head Island.

KEY INSIGHT #3



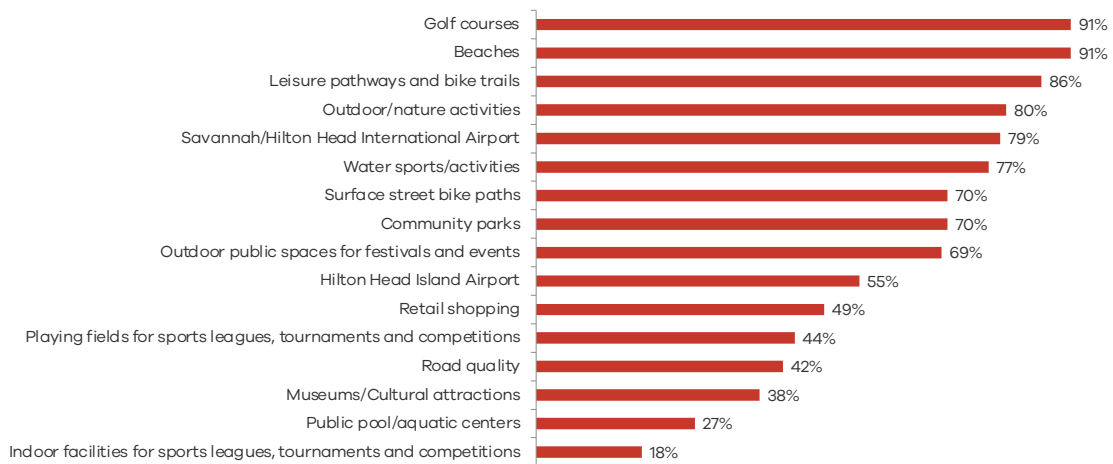
"I BELIEVE HILTON HEAD ISLAND IS A VERY SAFE PLACE TO LIVE"



Please indicate your level of agreement with the following statement:
I believe Hilton Head Island is a very safe place to live.

KEY INSIGHT #3

Highest Perceived Hilton Head Island Experiences



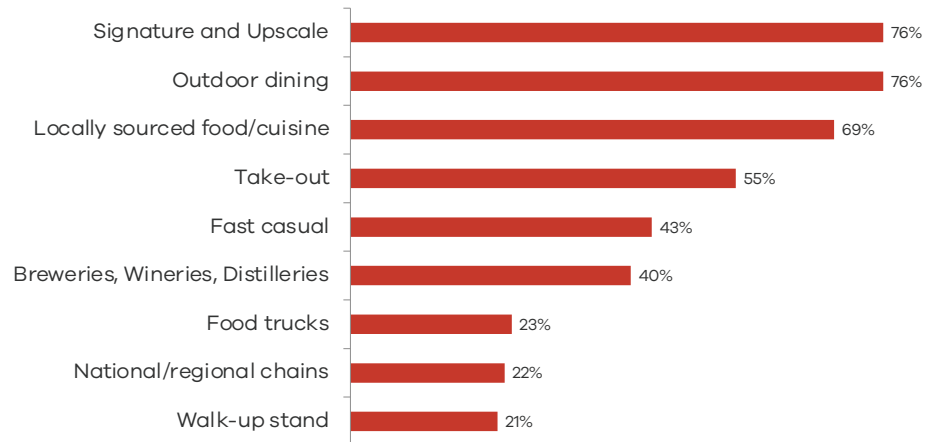
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Please indicate your perception of the quality of the following services, products and infrastructure on Hilton Head Island to serve visitors and residents alike.

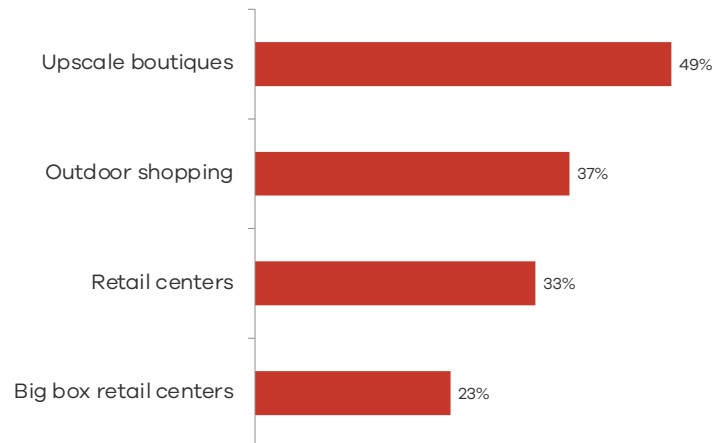
KEY INSIGHT #3

Perceived High Quality Dining Options



KEY INSIGHT #3

Perceived High Quality Shopping Options



KEY INSIGHT #4

 Travel Intelligence

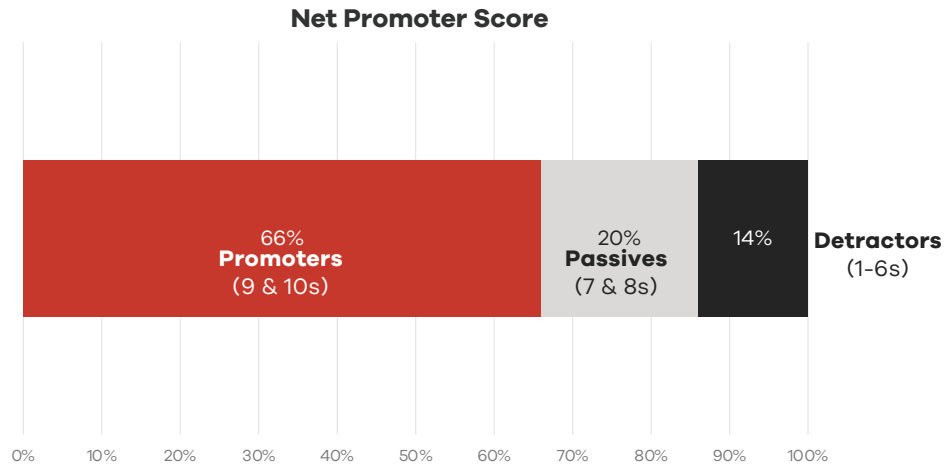
While residents give Hilton Head Island a high Net Promoter Score (NPS), many acknowledge a perceived negative impact of tourism that has dampened their enthusiasm for it.

KEY INSIGHT #4

 Travel Intelligence

KEY INSIGHT #4

The Net Promoter Score for Hilton Head Island among residents is +52 meaning there are more promoters than detractors among residents.



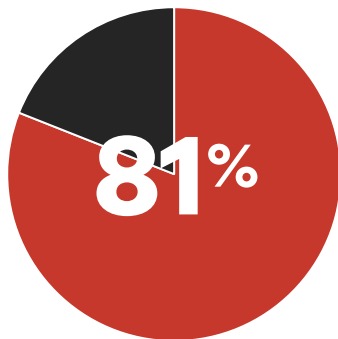
MMGY Travel Intelligence

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On a scale from 1-10, where 1 = Not Likely at All and 10 = Extremely Likely, how likely are you to recommend Hilton Head Island as a place to visit when talking to trusted friends and family members who do not live on Hilton Head Island?

KEY INSIGHT #4

% OF RESIDENTS WHO CONSIDER THEMSELVES ENTHUSIASTIC ADVOCATES OF HILTON HEAD ISLAND



Do you consider yourself to be a passionate advocate for Hilton Head Island?

MMGY Travel Intelligence



KEY INSIGHT #4

The top attributes passionate advocates recommend when talking about Hilton Head Island as a vacation destination are the Beaches, Restaurants, Biking/Bike paths, and Golf/Golf courses.



KEY INSIGHT #4

Negatives Aspects to Tourism on Hilton Head Island

Traffic/Overcrowding

The overwhelming response to this question is the traffic and congestion caused by tourists. This also causes a lack of parking and difficulties getting into local restaurants.

Trash/Littering

Residents also feel that tourists leave a significant amount of trash and litter on the beaches, especially during the Summer season.

Disrespectful Tourists

Residents believe that tourism is attracting a more disrespectful tourist to the Island that doesn't respect the natural resources and residents. These tourists are also partying more.

Other mentions:

- Two days of timeshare check-ins/check-outs
- Affordable housing
 - Some resident feel there isn't enough
 - Others believe it deters from the high quality of the Island
- Over-development/commercialization

KEY INSIGHT #4

WHAT CAN HILTON HEAD ISLAND DO?

“Improve the housing for workforce. Be sure we pay competitive wages to recruit and retain employees in the hospitality sector in particular

“Attract higher-end quality of guests.

“More unique local shops, artisans, artists; restaurants. No National restaurant chains..... keep things unique to HHI..... uniquely boutique!

“Improve the roadway, more landscaping, make use of vacant property like the big concrete lot on main street to bring nature and encourage outdoor activities

“Second set of bridges to get onto the island.

“Capitalize on the unique culture and history of Hilton Head. Cultivate Gullah cultural centers. Appeal to visitors who are interested in nature and would respect our environment. Visitors who are educated or interested in the natural world and want to explore our beaches respectfully.

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What could Hilton Head Island do to make the City more attractive to entice travelers to visit here rather than to another City?

COMMUNITY PERSPECTIVES RESIDENT STUDY

RESEARCH REPORT – JULY 2021



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

MMGY Travel Intelligence

A man and a woman are riding red bicycles on a sandy path that winds through tall, dry grass. The man is on the left, wearing a pink shirt and dark shorts, and the woman is on the right, wearing a white sleeveless top and shorts. They are both smiling and looking towards the camera. The path is made of light-colored sand, and the grass is a mix of green and brown. The sky is a vibrant blue with scattered white clouds. The overall scene is bright and sunny, suggesting a warm day.

HILTON HEAD ISLAND

SOUTH CAROLINA

THINKHILTONHEADISLAND.ORG