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### Resident and Visitor Satisfaction Surveys

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 report on resident and visitor satisfaction through annual survey results. We have an established process for both surveys including data collection, analysis and reporting.

Surveys can be found in the Appendix of this document.

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



### Revenue Per Available Room, Occupancy Rates & Average Daily Rate

Key performance indicators (KPIs) 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 are analyzed together.

Revenue Per Available Room, (RevPAR), is used to gauge industry health and is calculated by dividing the total room revenue by the 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.



Details on the next page provide 2022 performance metrics for Hilton Head Island in a two-source combined calculation that includes both home & villa and hotels as well as a breakout 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.

The home & villa numbers are based on 8,610 units/keys as of 02/07/2023 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 eighteen properties on the island.

For our home & villa and two-source reporting, we transitioned to the Key Data platform in 2021 and started reporting on this detail in 2022. Prior to 2022, we partnered with Inntopia DestiMetrics. Key Data reporting provides data on a larger amount of our home & villa product across the destination, resulting in more accurate reporting. Due to the difference in data between the two platforms, Key Data and Inntopia DestiMetrics, the percent difference from the prior year cannot be compared.

It is important to also note that for our hotel reporting we use Smith Travel Research (STR). They do conduct adjustments to prior year stats at the end of each calendar year. Due to these adjustments, the percent difference for the current year may seem off or inaccurate compared to the prior year.



### HOTEL INDUSTRY COMPARISON

#### Nationwide

- RevPAR up +29.8%
- Occupancy up +8.9%
- ADR up +19.1%

#### Competitor Set

Charleston

- RevPAR up +19.4 %
- Occupancy up +6.1%
- ADR up +12.5%

#### Savannah

- RevPAR up +24.2%
- Occupancy up +7.7%
- ADR up +15.4 %

Source: 2022 Key Data and Smith Travel Research (STR) Hurricane Ian - September 2022 Hurricane Nicole - November 2022

Note: In 2022 we began reporting on Key Data as our 2-source/Home & Villa resource. Note: Smith Travel Research adjusts reports annually, which can result in reporting variances year to year.



### **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.



### 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



### 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



### 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

### Visitor Spending Studies

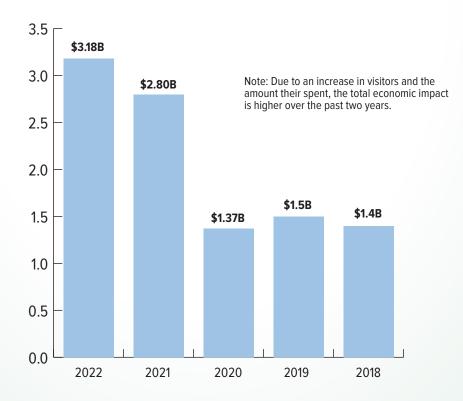
The study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2022 was performed by the College of Charleston School of Business, Office of Tourism Analysis.

The study examines spending by tourists classified into five segments according to their lodging arrangement while visiting the island: home and villa rentals, timeshare, hotel, second homeowners and non-paying quests, and 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 and visitors to the island had on Beaufort County, South Carolina.



# **\$3.18 BILLION**

### **ECONOMIC IMPACT OF** HILTON HEAD ISLAND TOURISM IN 2022



Source: Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2022

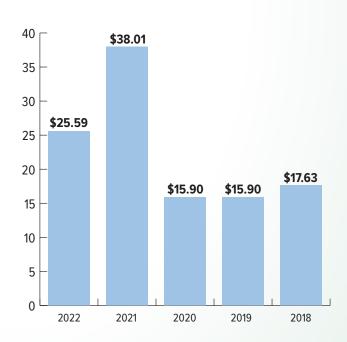
### ROI for Visitor Spending Per **Dollar of Investment**

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

The marketing efforts put forth by the Visitor & Convention Bureau are delivered consistently to a welldefined target consumer set that aligns with our visitor research. With other destinations opening post pandemic in 2022, Hilton Head Island saw a decrease in visitation by 1.2% compared to 2021.

#### FOR EVERY TAX DOLLAR INVESTED IN MARKETING





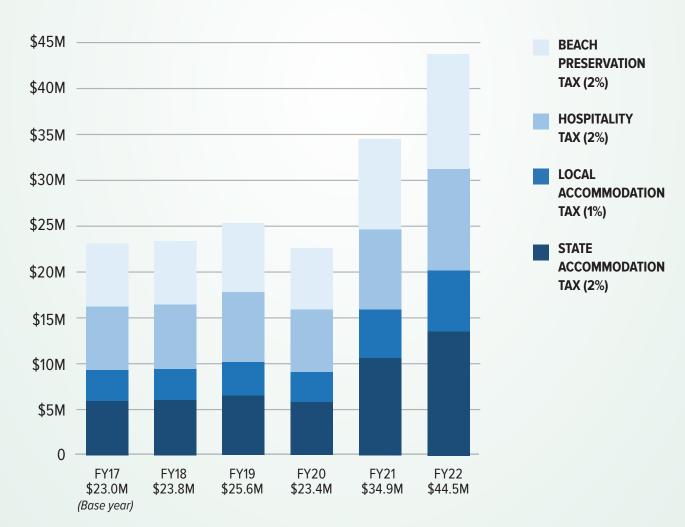
Source: Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2022

### Local Tax Revenues Generated by Visitor

### **ACCOMMODATION & HOSPITALITY TAX UP OVER 5 YEARS**

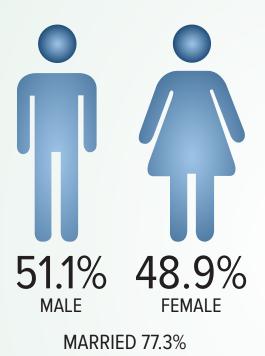
Source: Town of Hilton Head Island

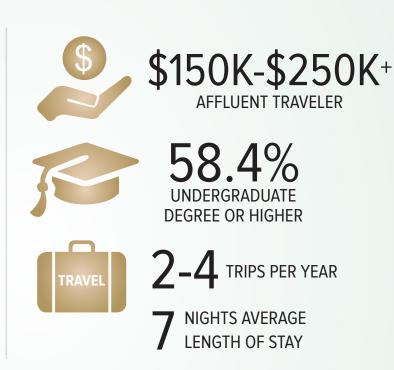
### **TOWN OF HHI ATAX and HTAX COLLECTIONS**

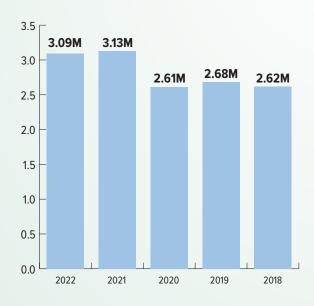


### **Number of Visitors**

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-\$250K+. Our 2022 research indicates a slight shift in the household decision-maker. We will continue to monitor the data and adjust our efforts appropriately. Our marketing outreach approach will continue to consist of targeted campaigns to ensure our desired demographic.







3.09M**NUMBER OF VISITORS IN 2022** 

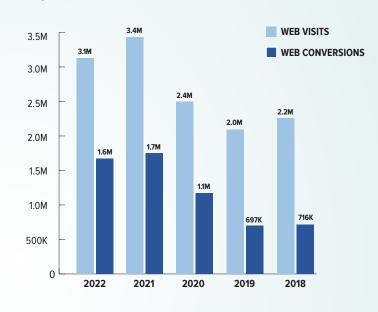
> Sources: 2022 Visitor Profile Study/Key Data/ Smith Travel Research Inc./College of Charleston

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

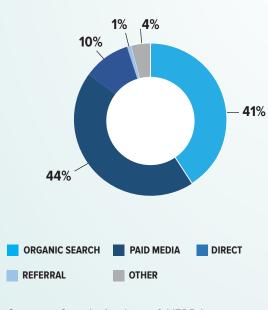
The HiltonHeadIsland.org website is our virtual storefront. The website serves as the window to our destination and plays an integral part in the decision-making process. The following metrics are important key indicators of overall brand health and allow insight into visitor behavior. The insight and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



1.6M WEBSITE CONVERSIONS **TO PARTNERS IN 2022** 

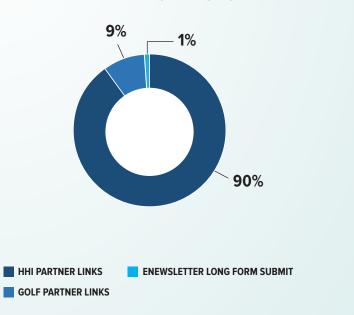


#### Visits by Source



Sources: Google Analytics & VERB Interactive

### **Conversion by Category**



### Numbers Related to Mail Fulfillment

The Hilton Head Island Official Vacation Planner, our comprehensive guide to help visitors plan and envision their vacation on America's Favorite Island®, is our primary print fulfillment piece.

We receive requests for this piece from multiple platforms; online, media, and home inquiries. In addition, we distribute the planner to state and local welcome centers, airports, AAA offices, tradeshows and is included in all public relations outreach.

76,349 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 of 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 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®

Forbes.com

"Named Among Best Places to Live in South Carolina"

"20 Best Small
Towns to Buy
a Vacation
Home"

Tripadvisor

"Top Travel

Destinations

for 2022"

"Southern Living
"South's
Best
Beaches"

"Coligny Beach named one of Tripadvisor's Best Beaches in the U.S."

"9 Bike-Friendly
Cities to Visit this
Summer"

Newsweek

Gullah Geechee Corridor named one of the "13 Great Multicultural Destinations"



### Condé Nast Traveler #1 Island in the U.S. 6th Consecutive Year

Cosmopolitan

"13 Best Places to Honeymoon in the

Tripadvisor

"Top 10 Trending

Destinations in the State

**HGTV** 

"Mitchelville Named among the Top Places To Visit during Black **History Month**"

Travel + Leisure

"Best Road Trip Getaways for 2022

Realtors.com

"Named #4 Luxury Market" Golf Digest

### Harbour Town named among the "Best Courses You Can Play in South Carolina"

Parade

"Destinations that are a Coastal **Grandmother's Dream!"** 

**VRBO** 

"VRBO's Top Shoulder Season Beach Destination"

**VRBO** 

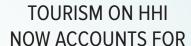
"23 South Beach Lagoon named one of the 2022 Vacation Homes of the Year"

### Number of Jobs Created by Tourism

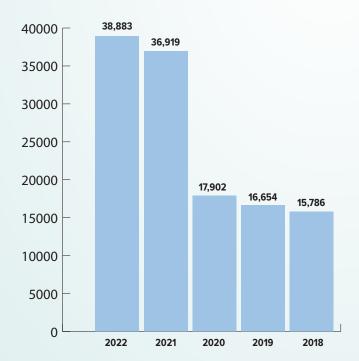
The study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2022 was performed by the College of Charleston School of Business, Office of Tourism Analysis.

The 38,883 jobs that comprise the estimated total employment impact generated by the five combined visitor segments in 2022 represent 33.4% of all jobs in Beaufort County.

**GENERATED FROM** HILTON HEAD ISLAND TOURISM



OF ALL JOBS IN **BEAUFORT COUNTY** 



Source: Estimated Total Impact of Tourism in Hilton Head Island On Beaufort County, South Carolina 2022

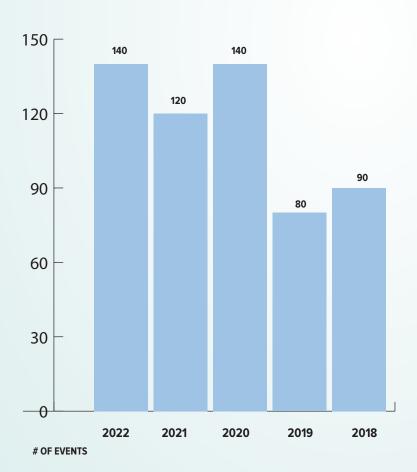
Note: The number of jobs generated is based on economic activity within different sectors of tourism. (e.g. airlines, car rentals, coach services, etc).

### **Networking Events, Workshops** and Member/Community Events

In 2022, we celebrated 40 ribbon cuttings and groundbreaking ceremonies along with 100+ in-person and virtual networking, learning seminars, and meetings, reaching 5,000 people.

100 + IN PERSON + VIRTUAL CHAMBER EVENTS

**RIBBON CUTTINGS** & GROUNDBREAKING **CEREMONIES** 



#### 2022 EVENTS

#### **JANUARY**

01/12/2022

Power Hour Tele-Town Hall

Virtual

01/12/2022

Jr. Leadership Class

**Healthy Lifestyle Day** 

Hilton Head Island

01/12/2022

**Leadership Class** 

**Healthy Lifestyle Day** 

Hilton Head Island

01/19/2022

**Ribbon Cutting** 

X-Golf

Bluffton

01/24/2022

**Business Continuity Meeting** 

Hilton Head Island

01/25/2022

**Ribbon Cutting** 

**Nectar Farm Kitchen** 

Bluffton

01/27/2022

Conversation + Cocktails

**Chronic Golf** 

Hilton Head Island

#### **FEBRUARY**

02/01/2022

**Business Education Partnership and Bluffton Regional Business Council** Meeting: Culinary Institute of the South

Bluffton

02/04/2022 Public Policy Committee Meeting

Hybrid

02/09/2022

Jr. Leadership Class Education Day

Bluffton

02/09/2022 Leadership Class Education Day

Bluffton

02/10/2022

Power Hour Tele-Town Hall

Virtual

02/11/2022 Ribbon Cutting Grind Coffee Roasters

Bluffton

02/17/2022

**Conversation + Cocktails** 

K1 Speed Bluffton

02/21/2022 Ribbon Cutting

**Compassion Funeral Home** 

Hilton Head Island

02/24/2022 Ribbon Cutting Parker's Kitchen Store

Hilton Head Island

02/24/2022

Chamber Young Professionals Nunzio Restaurant + Bar

Hilton Head Island

**MARCH** 

03/01/2022

Business Education Partnership Meeting

Hybrid

03/02/2022

Power Hour Tele-Town Hall

Virtual

03/01/2022 - 03/02/2022

Leadership Class State Government

Columbia

03/04/2022 Public Policy Committee Meeting

Hybrid

03/07/2022 Ribbon Cutting The Sandbox Hilton Head Island

03/16/2022

Jr. Leadership Class

**History Day** 

Hilton Head Island

03/21/2022 Ribbon Cutting Avantstay

Hilton Head Island

**APRIL** 

04/01/2022 Public Policy Committee Meeting

Hybrid

04/01/2022 Ribbon Cutting The Juice Hive

Bluffton

04/04/2022

Business Golf Classic Berkeley Hall

Bluffton

04/05/2022

Business Education Partnership Committee Meeting

Hybrid

04/06/2022

Power Hour Tele-Town Hall

Virtual

04/06/2022

**Ribbon Cutting Quarterdeck** 

Hilton Head Island

04/06/2022 Leadership Class Arts & Environment

Hilton Head Island & Bluffton

04/06/2022 Plaid Par-Tee Hilton Head Island

04/08/2022 Leadership Class Informational Coffee Hilton Head Island

04/11/2022 Ribbon Cutting Daniel Ravenel Sotheby's

Hilton Head Island

04/19/2022 Ribbon Cutting Marsh & Light Hilton Head Island

**Executive Connection Lowcountry Fresh Market** 

& Cafe
Bluffton

04/20/2022 Bluffton Regional

**Business Council DRCI** 

Bluffton 04/21/2022

Chamber Young Professionals/ Greater Island Council Future

of HHI Meeting Hilton Head Island

04/21/2022 Ribbon Cutting Cora Physical Therapy

Hilton Head Island

04/22/2022 Ribbon Cutting

**Coastal Provisions Company** 

Hilton Head Island

04/22/2022 Leadership Class Information Coffee

Bluffton 04/27/2022

Jr. Leadership Class Team Building Day

Bluffton

MAY

05/03/2022

**Business Education Partnership Committee** 

Meeting The Sandbox Hilton Head Island

05/04/2022

Jr. Leadership Graduation

05/06/2022 **Public Policy** 

Hilton Head Island

**Committee Meeting** 

Hybrid 05/11/2022

Power Hour Tele-Town Hall

Virtual

05/16/2022

Small Business Week Pork in the Parking Lot

Hilton Head Island

05/17/2022

Small Business Week **Small Business Seminar** 

Hilton Head Island

05/19/2022

**Small Business Week Bluffton Block Party** 

Bluffton

05/23/2022 **Ribbon Cutting** Vac Attack Bluffton

05/24/2022 **Ribbon Cutting** 

Palmetto Village - TSPR Hilton Head Island

05/25/2022

**Leadership Ribbon Cutting** 

Library Park Bluffton

05/26/2022 **Ribbon Cutting** 

Lowcountry Fresh Market &

Cafe Bluffton JUNE

06/01/2022

**Leadership Graduation** Hilton Head Island

06/01/2022

Power Hour Tele-Town Hall

Virtual

06/02/2022

**Chamber Champion Reception** 

Bluffton 06/03/2022 **Public Policy Committee Meeting** 

Hybrid

06/03/2022 **Ribbon Cutting** 

Namaste Spa at Grande Ocean

Resort

Hilton Head Island

06/07/2022

**Business Education** Partnership Meeting

Hybrid

06/08/2022 Biscuits + Benefits

**New Member Coffee** Hilton Head Island

06/09/2022

Conversations + Cocktails

**Nectar Kitchen** 

Bluffton

06/21/2022 **Ribbon Cutting** 

Southern Sky Recovery

Bluffton 06/22/2022

**Bluffton Regional Business** 

Council

**Burnt Church Distillery** 

Bluffton

06/22/2022

**Executive Connection** 

Culinary Institute of the South

Bluffton

JULY

07/06/2022

Power Hour Tele-Town Hall

Virtual

**AUGUST** 

08/03/2022

Power Hour Tele-Town Hall

Virtual

08/04/2022

**Chamber Young Professionals** Bee Town Mead & Cider

Bluffton

08/05/2022

**Business Education** 

Partnership & Public Policy

**Committee Meeting** 

Hybrid

08/11/2022 **Ribbon Cutting** Avocado Bleu Hilton Head Island

08/17/2022

**Leadership Program** 

Orientation

Hilton Head Island

08/18/2022

Conversation + Cocktails

X-Golf Bluffton 08/21/2022

Jr. Leadership Program

Orientation

Hilton Head Island

08/24/2022 **Ribbon Cutting** Ivybrook Academy Hilton Head Island

**SEPTEMBER** 

09/02/2022 **Public Policy Committee Meeting** 

Hybrid

09/06/2022

**Business Education** 

**Partnership** 

Hybrid

09/07/2022

Power Hour Tele-Town Hall

Virtual

09/09/2022-09/10/2022

Leadership Retreat

Hilton Head Island

09/09/2022 Ribbon Cutting

**Consolidated Planning** 

Bluffton

09/14/2022

Bluffton Regional Business Council

Bluffton

09/14/2022

Jr. Leadership Class Team Building at Dockside

Hilton Head Island

09/15/2022

Conversation + Cocktails

Aquatera

Hilton Head Island

09/16/2022

SC Chamber Grassroots Hilton Garden Inn

Hilton Head Island

09/21/2022

Biscuits + Benefits New Member Coffee

Hilton Head Island

09/21/2022

**Leadership Class** 

Town of Hilton Head Island

Government Day Hilton Head Island

**OCTOBER** 

10/04/2022

**Business Education** 

**Partnership** 

Hybrid

10/05/2022

Power Hour Tele-Town Hall

Virtual

10/06/2022 Ribbon Cutting

Cassandra's Kitchen

Bluffton

10/07/2022

Public Policy

**Committee Meeting** 

Hybrid

10/12/2022

Leadership Class Town of Bluffton Government Day

Bluffton

10/19/2022

Jr. Leadership Class College & Career Day

Bluffton

10/20/2022

Conversation + Cocktails

Hilton Garden Inn

Hilton Head Island

10/26/2022

Power Hour Tele-Town Hall

Virtual

10/27/2022

Ribbon Cutting

Right at Home

Bluffton

**NOVEMBER** 

11/01/2022

Business Education Partnership Meeting

Hybrid

11/02/2022

State of the Region

Hilton Head Island

11/04/2022

**Public Policy** 

**Committee Meeting** 

Hybrid

11/09/2022

**Bluffton Regional Business** 

**Council: Lowcountry Fresh** 

Market & Cafe

Bluffton

11/17/2022

Conversation + Cocktails

Carolina Coffee & Crumble

Hilton Head Island

**DECEMBER** 

12/07/2022

Power Hour Tele-Town Hall

Virtual

12/7/2022

Jr. Leadership Class

**Communication & Etiquette Day** 

Bluffton

12/09/2022

Sparkles & Spirits

**Burnt Church Distillery** 

Bluffton

12/14/2022

**Leadership Class** 

**Justice Day** 

Beaufort/Bluffton

12/15/2022

Conversation + Cocktails

Ocean Oak Resort

Hilton Head Island

















### Media Impressions and the Dollar Equivalent

Per our contract, our organization tracks all print, digital, and broadcast mentions and stories about Hilton Head Island. Hosting visiting journalists 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 our organization's daily public relations outreach efforts in partnership with Weber Shandwick, one of the world's leading travel public relations firms.

> 2,799 **STORIES & MENTIONS**

11,119,754,831

**MEDIA IMPRESSIONS** 

\$21,119,046.34

**AD EQUIVALENCY** 

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

2022

Stories & Mentions

2.799

**Impressions** 

11,119,754,831

Ad Value

\$21,119,046.34

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** 

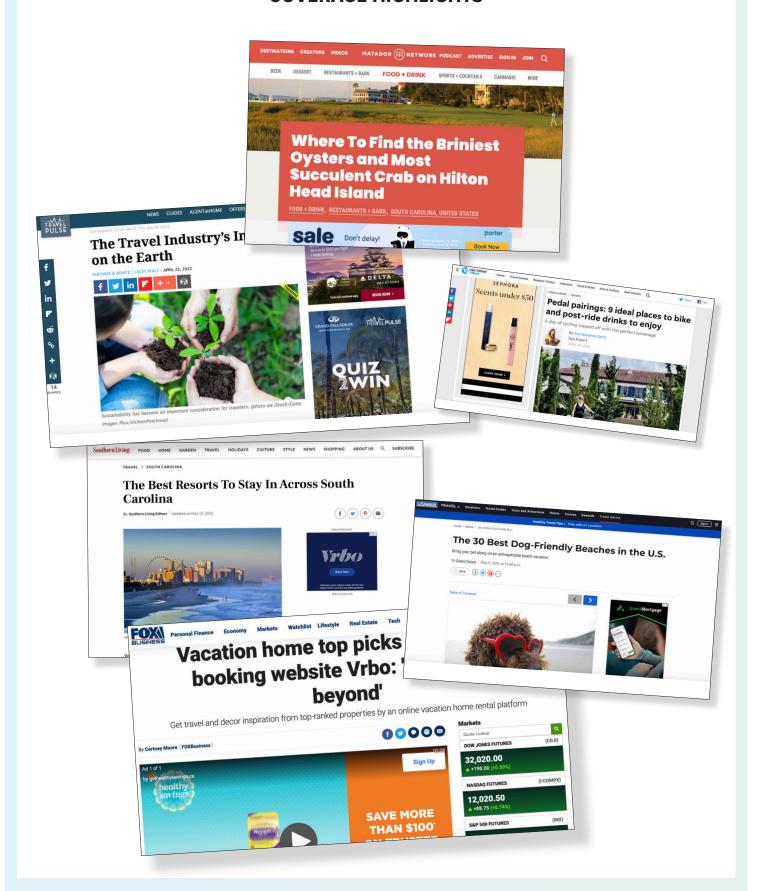
1,829,828,359

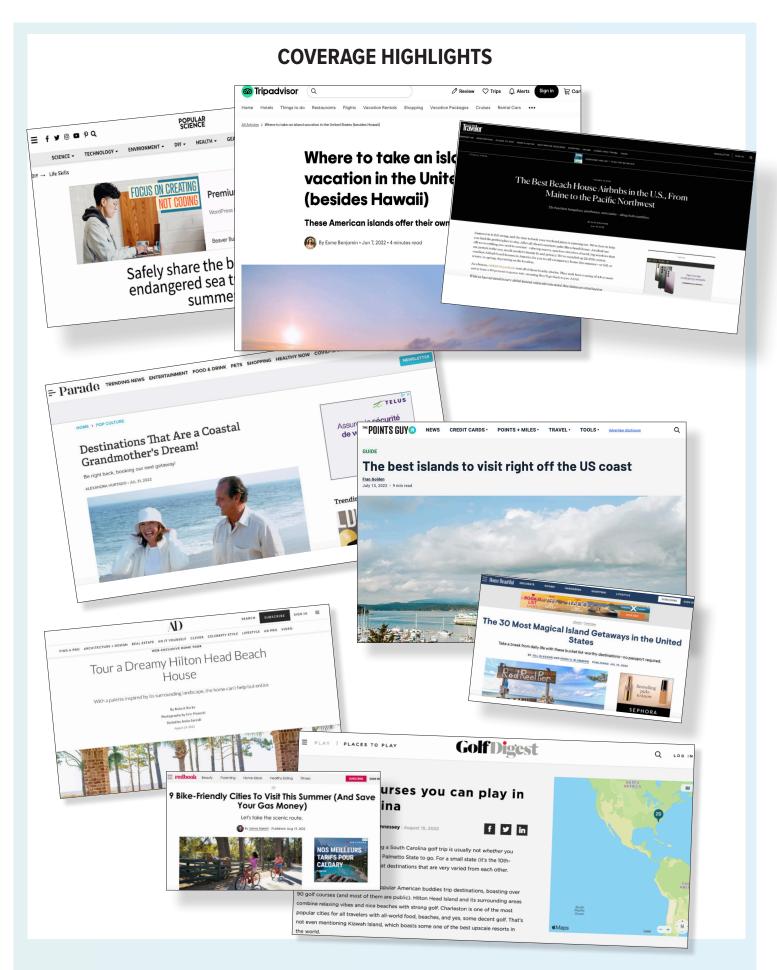
Ad Value

\$21,992,361.71

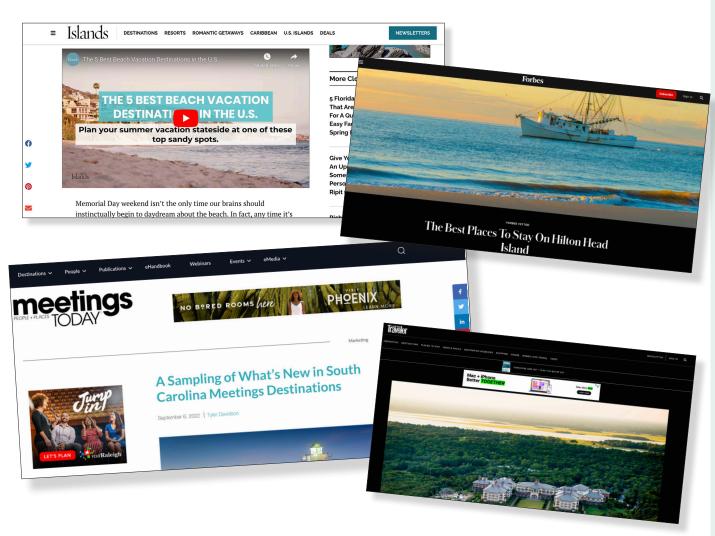
### **COVERAGE HIGHLIGHTS** GARDEN/GUN SUBSCRIBE NOW $\cite{Q}$ By GWEN PRATESI January 13, 2022 f 🂆 🕡 🖈 🖶 SAVINGS TO FEEL HAPPY ABOUT ■ 12 Travel Destinations to Celebrate Black History Montl in 2022 21 Black History Month Destinations You Should Visit f y in F + 2 🛱 Purelvou FAMILY FASHION PUREWOWIGE GIFT OUTGE 15 Best Weekend Beach Getaways in the US The 24 Best Spring Break ( P P B Destinations for Families sale **Best Spring Break Family Destinations** Though spring break is commonly associated with beach-bound college coeds, there are plenty of getaways that provide a kid-oriented atmosphere, from theme parks to jaw-drooping natural wonders. To determine which are ideal for traveliers with children in tow, U.S. News considered entertainment options and family-ideal for traveliers with children in tow, U.S. News considered entertainment options and family-trendly drining and lodging choices—along with user votes — to create this ranking of the best spring break ready destinations. Vote below for your favorite spots to keep them on next year's list. (Note: Some of the below destinations may be affected by the coronavirus outbreak. Check with the CDC and U.S. Department of State before traveling.) **Forbes** Where To Go For The Best Dining And Drinking On Hilton Head Island Read Best Vacations Methodology » SUMMARY ~ **(f) (a) (a)** (a) The 13 Best Places to Go on Your Honeymoon in the Listen to article 6 minutes 11111 Good Ol' USA **6** mailchi We all agree it's the best part of the wedding, right? ☐ SAVE ARTICLE Genera upto ASS MO Orde

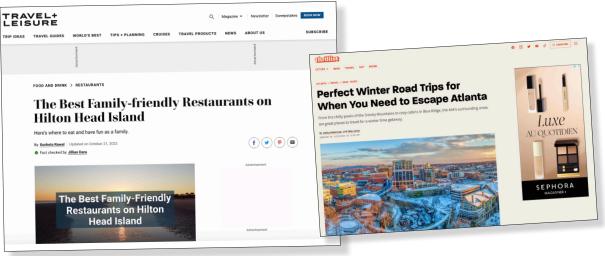
### **COVERAGE HIGHLIGHTS**



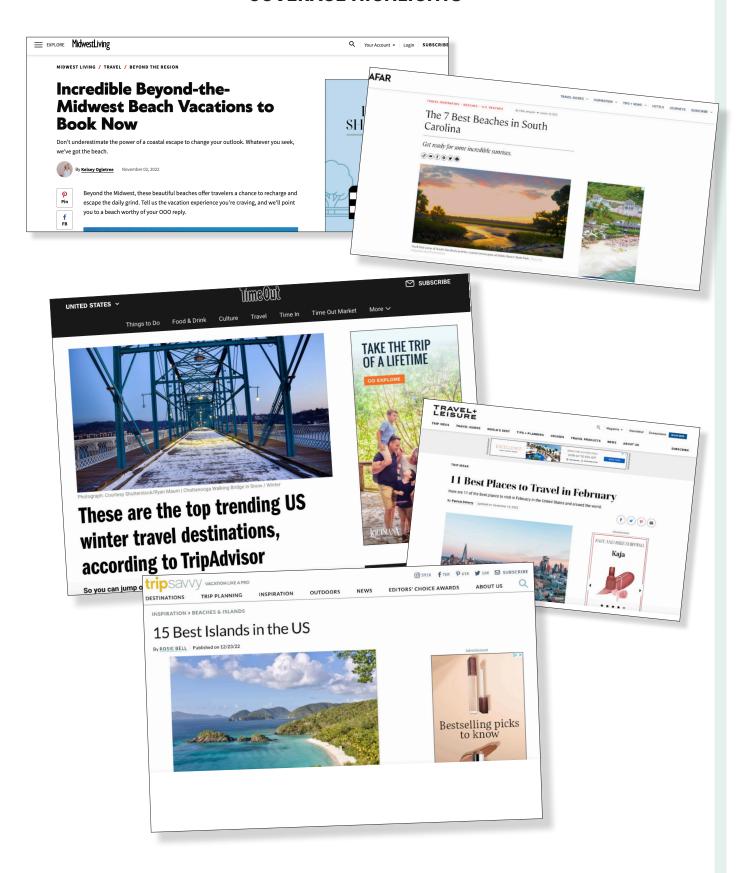


### **COVERAGE HIGHLIGHTS**





### **COVERAGE HIGHLIGHTS**



### **Appendix**

2022 Community Sentiment Survey: MMGY Travel Intelligence

2022 Visitor Profile Study Executive Summary: Office of Tourism Analysis, College of Charleston



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# Survey METHODOLOGY

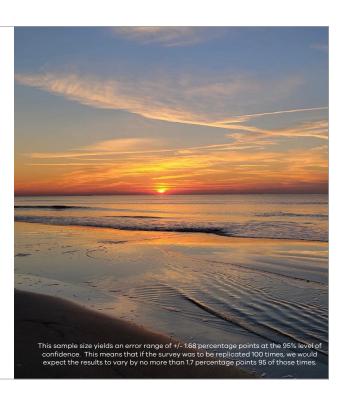


### **Survey Methodology**

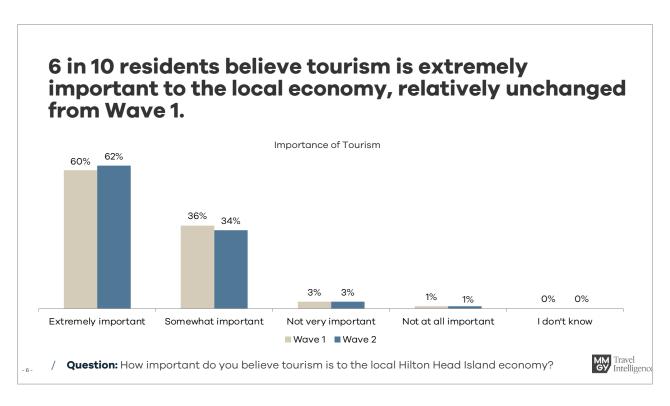
- MMGY Travel Intelligence conducted an online survey of 3,292 Hilton Head Island residents.
- Residents were invited to complete the online survey through the Chamber website, social media channels, and email outreach.
- The survey was fielded August 22, 2022 -September 4, 2022. Data were tabulated 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.

Comparisons in this report were made to Wave 1, as well as some comparisons across length of residency and employment status.

Throughout this report, data in bold indicates a significant difference.







### More of those who have moved to Hilton Head Island within the last 5 years find tourism to be extremely important than those who have lived here longer.

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Extremely important	70%	56%	60%	58%
Somewhat important	27%	39%	36%	36%
Not very important	2%	4%	4%	4%
Not at all important	0%	1%	1%	1%
I don't know	0%	0%	0%	1%

/ Question: How important do you believe tourism is to the local Hilton Head Island economy?



## Those who work are more likely to find tourism to be extremely important to the Hilton Head Island economy than those who are retired.

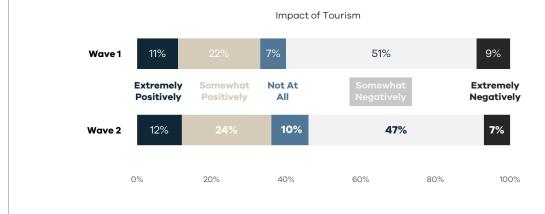
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely important	64%	72%	58%
Somewhat important	32%	25%	37%
Not very important	4%	3%	3%
Not at all important	0%	0%	1%
I don't know	0%	0%	1%

/ Question: How important do you believe tourism is to the local Hilton Head Island economy?



- 8 -

# Compared to Wave 1, slightly more residents feel that tourism impacts their life positively, while slightly fewer feel it has a negative impact.



Question: How would you say Hilton Head Island tourism impacts your life as a resident?



### Those who have lived here longer are more likely to feel that tourism effects them negatively than those who moved here in the past 5 years.

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Extremely positively	13%	8%	12%	13%
Somewhat positively	27%	24%	22%	21%
Not at all	13%	10%	9%	8%
Somewhat negatively	42%	50%	48%	49%
Extremely negatively	4%	7%	9%	9%

Question: How would you say Hilton Head Island tourism impacts your life as a resident?



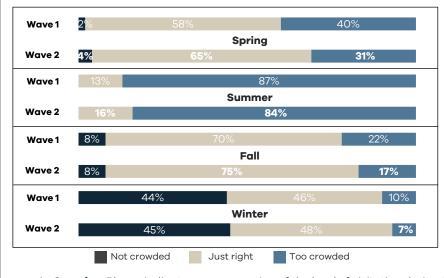
## Retirees are more likely to feel tourism impacts them negatively than those who currently work.

By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely positively	18%	21%	7%
Somewhat positively	28%	25%	22%
Not at all	7%	13%	11%
Somewhat negatively	39%	36%	53%
Extremely negatively	8%	5%	7%

Question: How would you say Hilton Head Island tourism impacts your life as a resident?



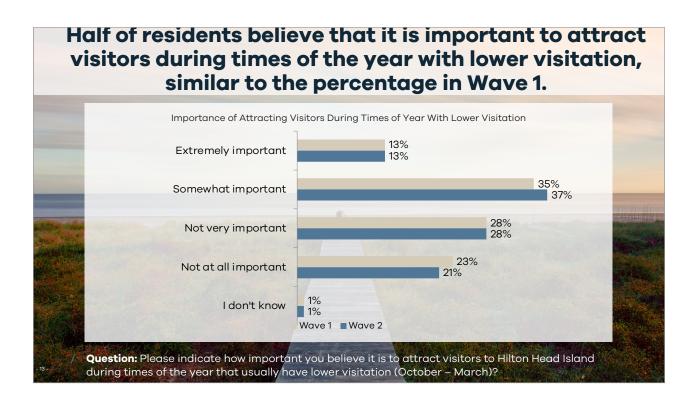
# **Seasonal Perceptions**

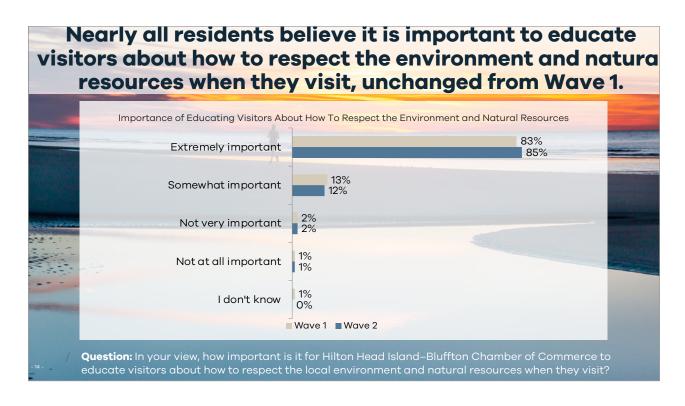


- The majority of residents believe that Summer is too crowded, while Spring and Fall have just the right amount of visitation.
- Compared to Wave 1, the percentage of residents who feel that each season is too crowded decreased significantly. While significantly more residents consider Spring, Summer, and Fall to have just the right number of visitors.

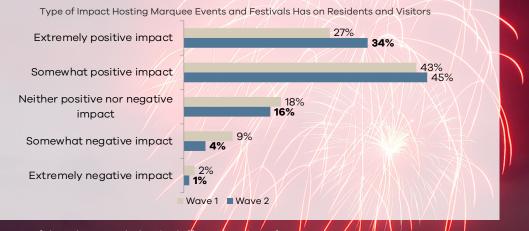
Question: Please indicate your perception of the level of visitation during the following seasons.











Question: One of the Hilton Head Island-Bluffton Chamber of Commerce's objectives is to promote marquee events and festivals (e.g., Concours d'Elegance, Seafood Festival, Wine & Food Festival, etc.) Please indicate the type of impact you believe these activities have on the quality of life for ocal residents and visitors.

While educating visitors still tops the list, significantly more resident support efforts to fund cultural attractions, the promotion of attractions, and branding and marketing Hilton Head Island for tourism.

	Wave 1	Wave 2
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%	87%
I support efforts by our town in the funding and installation of local public art, exhibits, and cultural attractions	67%	70%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in promoting attractions, festivals, exhibits and similar on Hilton Head Island	57%	67%
I support efforts by the Hilton Head Island-Bluffton Chamber of Commerce in branding and marketing Hilton Head Island for tourism	47%	51%

Question: Please indicate your level of agreement with each of the following statements:

MM Travel



Residents were asked their level of agreement with a few statements related to tourism in Hilton Head Island.

For organizational purposes, these statements have been grouped and labeled as "positive" or "negative."

### Positive: Tourism on Hilton Head Island...

- Generates tax revenues for state, county and local governments. Supports existing small businesses throughout the year Helps create a positive ambiance/vibe in the local community

- Helps to offset the costs for public safety personnel, streets/roads, schools Reduces taxes for residents (ex. property taxes, county and city sales taxes,
- Increases real estate values

### Negative: Tourism on Hilton Head Island...

- Creates traffic congestion problems for residents Causes local restaurant & entertainment prices to rise



### The most agreed with statements are related to how tourism provides the opportunity for "creation" - new amenities, new jobs, new restaurants and new businesses.

- Indicates a significant difference from Wave 1. For these positive statements, a green, up arrow indicates a more positive perception (more people agree).
- Indicates a significant difference from Wave 1. For these positive statements, red, down arrow indicates a more negative perception (more people disagree).

Positive Statements (% Agree) – Top 6	Wave 1	Wave 2
Generates tax revenues for state, county and local governments	76%	80% 🛦
Creates jobs for area residents	71%	73% 🛦
Provides restaurants that local residents can also enjoy	63%	68% ▲
Supports local business creation	64%	68% ▲
Increases real estate values	64%	66%
Provides amenities and attractions that local residents can also enjoy	56%	62% 🔺

Question: Please indicate your level of agreement with the following statements: Tourism on Hilton Head Island...



### Compared to last wave, more residents agree with the least agreed upon statements, including that tourism reduces taxes for residents.

- Indicates a significant difference from Wave 1. For these positive statements, a green, up arrow indicates a more positive perception (more people agree).
- Indicates a significant difference from Wave 1. For these positive statements, a red, down arrow indicates a more negative perception (more people disagree).

Positive Statements		
(% Agree) – Bottom 4	Wave 1	Wave 2
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55% 🔺
Covers the cost of beach renourishment	50%	53% 🔺
Is an important factor in making our community a great place to live	39%	45% 🛕
Helps create a positive ambiance/vibe in the local community	33%	37% 🛕

Question: Please indicate your level of agreement with the following statements: Tourism on Hilton Head Island...



# Traffic is the number one tourism concern of residents, although fewer residents agree than did so last wave.

- Indicates a significant difference from Wave 1. For these negative statements, a red, up arrow indicates a more negative perception (more people agree).
- Indicates a significant difference from Wave 1. For these negative statements, a green, down arrow indicates a more positive perception (more people disagree).

Negative Statements (% Agree)		
W-1.50	Wave 1	Wave 2
Creates traffic congestion problems for residents	86%	82% ▼
Brings too many people to Hilton Head Island	65%	59% ▼
Negatively impacts our natural resources	61%	57% 🔻
Causes local restaurant & entertainment prices to rise	49%	52% 🛕

**Question:** Please indicate your level of agreement with the following statements: Tourism on Hilton Head Island...



### Tourism on Hilton Head Island...

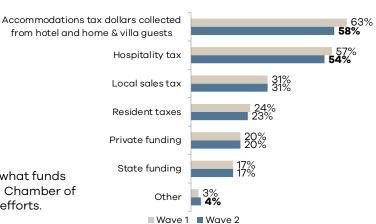
All Statements (% Agree)	Wave 1	Wave 2
Creates traffic congestion problems for residents	86%	82%
Generates tax revenues for state, county and local governments	76%	80%
Creates jobs for area residents	71%	73%
Provides restaurants that local residents can also enjoy	63%	68%
Supports local business creation	64%	68%
Increases real estate values	64%	66%
Provides amenities and attractions that local residents can also enjoy	56%	62%
Brings too many people to Hilton Head Island	65%	59%
Supports existing small businesses throughout the year	56%	59%
Helps to offset the costs for public safety personnel, streets/roads, schools	53%	58%
Negatively impacts our natural resources	61%	57%
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55%
Covers the cost of beach renourishment	50%	53%
Causes local restaurant & entertainment prices to rise	49%	52%
Is an important factor in making our community a great place to live	39%	45%
Helps create a positive ambiance/vibe in the local community	33%	37%

**Question:** Please indicate your level of agreement with the following statements: Tourism on Hilton Head Island...



# Hilton Head Island-Bluffton Chamber of **Commerce Funding**

of residents believe they know what funds the Hilton Head Island-Bluffton Chamber of Commerce tourism marketing efforts.



Question: Which of the following do you believe funds the Hilton Head Island-Bluffton Chamber of Commerce tourism marketing efforts? Please select all that apply.



Resources Provided to Family and Friends When Visiting.

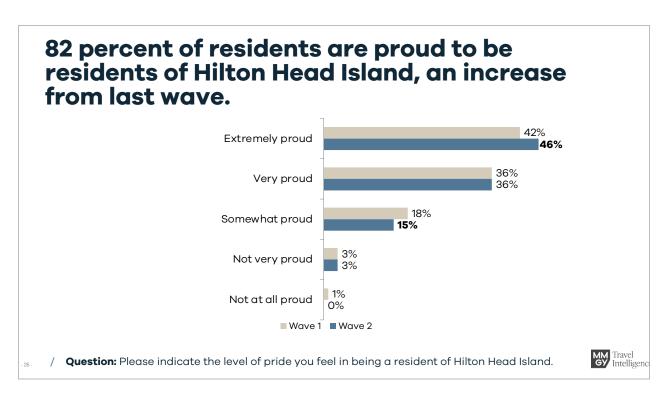
of residents provide resources to family and friends for trip planning when visiting Hilton Head Island

**Activities** Google Tripadvisor Social Media Local LifeHotels
Hilton Head Monthly Local LifeHttps://www.Hiltonhead
Personal Recommendations Golf Courses Local Magazines Sea Pines

Question: When you are expecting out of town family or friends to visit you on Hilton Head Island, do you provide them with links to webpages and resources for their trip planning? / Which webpages and resources do you provide?







### Those who work are more likely to be extremely proud in their residency than retirees.

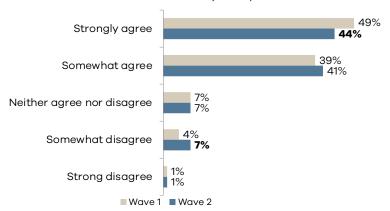
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely proud	49%	54%	44%
Very proud	31%	33%	38%
Somewhat proud	16%	11%	15%
Not very proud	3%	2%	3%
Not at all proud	1%	0%	1%

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



# Although slightly fewer residents agree that they believe Hilton Head Island is a safe place to live compared to Wave 1, the majority of residents still agree with this statement.

"I believe Hilton Head Island is a very safe place to live."



Question: Please indicate your level of agreement with the following statement:



# **Perceived Quality of Hilton Head Island Experiences**

Top 2 Box	Wave 1	Wave 2
Beaches	91%	92%
Golf courses	91%	91%
Leisure pathways and bike trails	86%	86%
Outdoor/nature activities	80%	82%
Savannah/Hilton Head International Airport	79%	80%
Water sports/activities	77%	79%
Outdoor public spaces for festivals and events	69%	77%
Community parks	70%	77%
Surface street bike paths	70%	70%
Hilton Head Island Airport	55%	57%
Retail shopping	49%	54%
Playing fields for sports leagues, tournaments and competitions	44%	48%
Road quality	42%	44%
Museums/Cultural attractions	38%	43%
Public pools/aquatic centers	27%	32%
Indoor facilities for sports leagues, tournaments and competitions	18%	22%

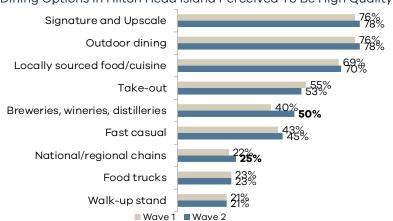
- The highest perceived Hilton Head Island experiences are its beaches, golf courses, and leisure pathways and bike trails.
- Compared to Wave 1, significantly more residents perceive many of the Hilton Head Island experiences to be good quality including:
  - Water sports/activities
  - Outdoor public spaces
  - Community parks
  - Retail shopping
  - Playing fields
  - Museums/cultural attractions
  - Public pools/aquatic centers
  - Indoor facilities

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



# Nearly 8 in 10 residents believe Hilton Head Island has quality signature and upscale dining and outdoor dining.

Dining Options in Hilton Head Island Perceived To Be High Quality

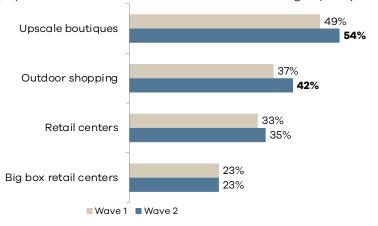


Question: Please indicate your perception of the quality of each of the following categories of dining and restaurant options on Hilton Head Island.



# Compared to Wave 1, significantly more residents believe Hilton Head Island has quality upscale boutiques and outdoor shopping.

Shopping Options in Hilton Head Island Perceived To Be High Quality



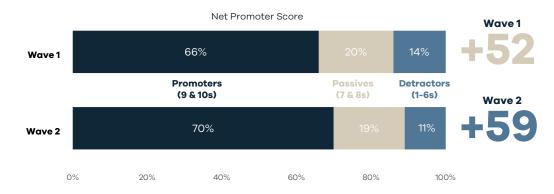
**Question:** Please indicate your perception of the quality of each of the following categories of shopping on Hilton Head Island.



# Key INSIGHT #4

The Net Promoter Score of residents has increased significantly from last wave and a similar percentage consider themselves passionate advocates. While many of the same negative aspects of tourism were mentioned as last wave, with the addition of the positive aspects question, we see many residents citing tourism's monetary benefits, amenities, and the positive atmosphere it creates.

# The Net Promoter Score has increased from Wave 1 with more residents falling into the promoter category and fewer detractors.



/ Question: 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?



### Net Promoter Scores decrease as length of residency increases, although all scores are still extremely positive.

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Promoters (9+10s)	78%	68%	66%	63%
Passives (7+8s)	16%	19%	21%	22%
Detractors (1-6s)	6%	13%	13%	15%
NPS	+72	+55	+53	+48

Question: 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?



### Net Promoter Scores are higher for those who work offisland than those who work on-island or are retired.

By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Promoters (9+10s)	67%	79%	69%
Passives (7+8s)	20%	14%	20%
Detractors (1-6s)	13%	7%	11%
NPS	+54	+72	+58

Question: 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?



of residents consider themselves passionate advocates for Hilton Head Island

### Favorite Island Attributes To Share When Recommending Hilton Head Island As a Vacation Destination



Question: Do you consider yourself to be a passionate advocate for Hilton Head Island? / As an advocate, what are your favorite island attributes to share and talk about when recommending Hilton Head Island as a vacation destination?





### Similar to last wave, a few residents used this question to cite their frustration with tourism.

"I do not recommend as a vacation destination. That is how I advocate for the island."

"Our beauty and natural environment which unfortunately is quickly being destroyed by those wishing to increase tourism and the clear cutting of areas in favor of developers."

"We need to find a balance between the full-time residence and the tourism industry. We have come to a tipping point where we need to refocus and needs of the HHI residents."

"I do NOT recommend HHI as a vacation destination. HHI used to be an exclusive, private community with a strong commitment to preserving its natural beauty. Tourism is destroying this beauty."

"I'm an advocate for the island, not a promoter for the island. I recognize tourism is important for some businesses. However, as a whole I think tourists negatively impact the local environment, crime, and traffic."

Question: As an advocate, what are your favorite island attributes to share and talk about when recommending Hilton Head Island as a vacation destination?



# **Positive Aspects to Tourism on Hilton Head Island**

### **Monetary Benefits**

Many residents recognize the monetary benefits of tourism including that it reduces their taxes, it supports the local economy, increases their real estate values, provides rental property opportunities, and supports small businesses.

### **Amenities**

Residents also recognize that many of the amenities, events, restaurants, and shopping available to them on Hilton Head Island are a result of tourism. They also know that tourism pays for beach renourishment, improvements, and beautification of the Island.

### **Atmosphere**

Some residents feel that tourism and visitation on Hilton Head Island creates a youthful and vibrant atmosphere. They enjoy getting to meet and interact with new people from all over the world.



# **Negative Aspects to Tourism on Hilton Head Island**

### **Traffic**

of the biggest negative aspects about tourism is the traffic it causes both on the roads and on bike paths. Many mentioned the amount of traffic specifically on Saturdays. Some residents mentioned that many visitors don't follow traffic and biking rules which cause even more traffic issues.

### Overcrowding

Residents also cited overcrowding and a lack of proper infrastructure to handle the number of visitors and new residents. They feel this affects their own enjoyment of their home because they can't get into Island restaurants or amenities. Although many mentioned a lack of infrastructure, others overdevelopment as a negative aspect.

### **Lack of Respect**

Residents believe that the quality of visitor has decreased in recent years. They believe the current visitors have a lack of respect for residents and for the environment and the Island's natural resources. They say these visitors leave litter on the beaches, are loud, and disrupt the ecosystem of the wildlife.

### **Rising Prices**

rising prices in restaurants and in grocery stores as a negative aspect of tourism. Some also mentioned the rising prices of housing on Hilton Head Island which is pricing out long-time residents, working-class families, and the Island workforce.



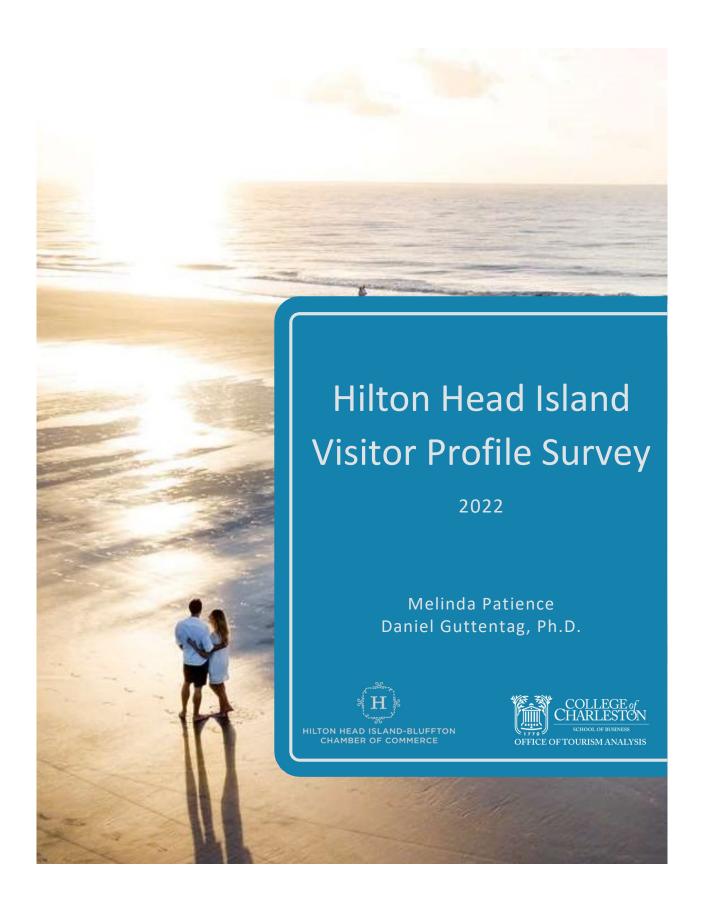
# **Top Concerns Facing The Community**

	Wave 2
Workforce shortage	48%
278 Corridor project	38%
On-island workforce housing	36%
Overall development	29%
Environmental/open spaces protection	26%
General infrastructure needs (e.g. water/sewer, roads, other utilities)	20%
Short-term rental noise and parking	16%
South-end traffic	16%
Repurposing/modernizing Island commercial buildings	14%
Mid-Island initiative and redevelopment (Northridge Plaza, Port Royal Plaza, Mid-Island Park)	12%
North-island traffic	11%
Bike safety	9%
Daytrippers/beach parking at Coligny	5%
Arts and development of cultural assets (e.g. Mitchelville Freedom Park)	4%
Other	9%
None of the above	0%

The top concerns residents feel are facing their community are the workforce shortage, the 278 Corridor project, and on-island workforce housing, followed by overall development and environmental/open spaces protections.

**Question:** What are your top three concerns facing our community?





HILTON HEAD ISLAND VISITOR PROFILE SURVEY	2022
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 843.953.1996   OTA.COFC.EDU   PATIENCEM@COFC.EDU	





#### **EXECUTIVE SUMMARY**

#### **SAMPLE DEMOGRAPHICS**

Millennials represented 46.7% of the respondents, followed by Gen X (24.0%), and then Baby Boomers (22.9%). Over 58% of those surveyed had a Bachelor's degree or higher, and more than 57% had an annual household income of \$100,000 or more per year. Also, over three-fourths of the respondents were married.

#### **POINT OF ORIGIN**

The respondents resided in 366 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from east to west coast. More respondents resided in Ohio than any other state (8.3%). Next were New York and California (7.5% each), followed then by Texas (4.8%), Pennsylvania (4.7%), and then Illinois and North Carolina (3.5% each). In-state visitors did not make up a significant 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; Los Angeles-Long Beach-Anaheim, CA; Chicago-Naperville-Elgin, IL-IN-WI; Baltimore-Columbia-Towson, MD; Atlanta-Sandy Springs-Roswell, GA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Seattle-Tacoma-Bellevue, WA; Columbus, OH; Boston-Cambridge-Newton, MA-NH; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Cleveland-Elyria, OH; and Cincinnati, OH-KY-IN.

Canada remains the top international origin market amongst respondents (47.8%), followed by Europe (18.8%).

### THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (62.0%), relaxation (34.1%), and spending time with family (32.6%), followed by biking (21.3%), culinary experiences (14.2%), and boating (13.6%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include nature-based activities, museums, and wellness activities.

Of those surveyed, 57.4% of overnight visitors and 81.0% 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 3.7 for overnight visitors and 4.7 for day trip visitors. The main mode of transportation to the island continues to be personal/family car (59.3%). However, flying into the destination increased notably from the prior survey (25.5% to 36.9%), with the proportion of visitors flying into Hilton Head Island Airport remaining steadily over 30% (33.8%).

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed

approximately 8.6 nights, hotel visitors stayed 5.1 nights, timeshare visitors stayed 9.6 nights, and second homeowners stayed 9.8 nights. The overall average was 7.0 nights.

Home/villa rental continues to be the most popular choice of paid accommodation for overnight visitors (26.6%), followed by hotels (23.6%), resorts (19.0%), timeshares (12.7%), and second homes (5.6%).



#### TRAVEL PLANNING

VRBO remains by far the most

popular online booking platform for villas/homes (29.2%), followed by local vacation rental companies (24.7%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (13.0%). The percentage of respondents booking via Airbnb continues to increase from year-to-year (10.0% to 12.0%).

Other destinations like Gulf Shores, Hawaii, the Caribbean, and the Outer Banks were the top competitors for Hilton Head Island as alternative beach destinations. The top competing market was the Alabama Golf Trail.

Top reasons for choosing to visit Hilton Head Island were beach destination (45.7%), previous visitation (42.5%), word-of-mouth/recommendation (26.2%), wanting to visit nature-based attractions (23.3%), and within driving distance of home (19.4%).

Of those visitors surveyed, 85.2% indicated an intention to return to visit Hilton Head Island, which signals a high degree of trip satisfaction.

#### **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=341), 42.9% had never visited the Hilton Head Island / Bluffton area before, and 50.4% had visited one to five times before.

Of those non-visitors, 27.0% traveled elsewhere, 5.3% found it too expensive, 5.0% mentioned health reasons, 4.1% were hesitant because of unpredictable weather events, 3.2% did not find what they were looking for, and 0.6% did not travel at all. Over 25% stated the COVID-19 pandemic is still keeping 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 (33.7%) and South (22.3%) were the most popular. Nonetheless, 50.1% 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 (52.9%) 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 (78.0%), relaxation & rejuvenation (74.7%), passive outdoor adventures (67.0%), historical attractions (64.1%), and romantic couple-getaways (63.1%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (85.0%), ease of access (82.3%), quality of lodging and dining options (81.0% and 81.2%), diversity of dining options (79.3%), affordability (78.8%), and travel distance (70.8%).







#### **METHODOLOGY**

The 2022 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2022 and January 2023, 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 contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted multiple times during the same time period on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,918 completed surveys were collected. This report is based largely on the 1,913 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 two times this study was completed, examining visitation in 2019 and 2021. When 2019 data is not presented, it is because the question was not asked in that survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2021, and 2022. 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	2021	2022	Change (%)
Villa/Home Rentals	962,686	951,126	-1.2%
Hotels/Resorts	508,977	497,574	-2.2%
Timeshares	481,934	481,461	-0.1%
Second Homeowners	719,302	710,673	-1.2%
Non-paying Guests	186,667	184,428	-1.2%
Day trippers	267,290	264,083	-1.2%
Total Visitors	3,126,856	3,089,346	-1.2%

Table 1: Visitor Estimates for 2021 and 2022





