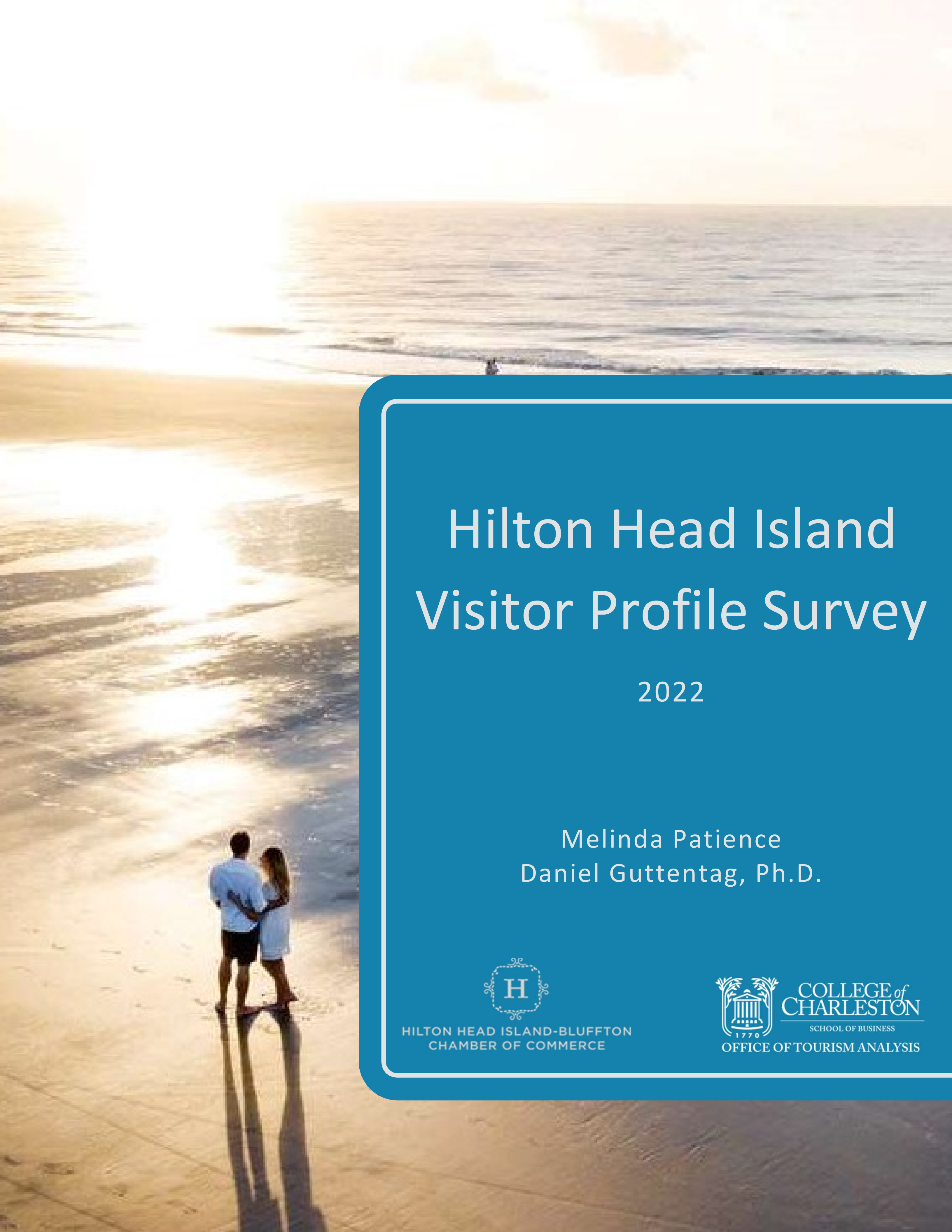

Hilton Head Island Visitor Profile Survey

2022

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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