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Letter from Our President & CEO,

If there was a single word to describe our philosophy on tourism in our community, it would be balance.

It's a delicate balance to enhance the quality of life for those who call our island home with travelers who choose to visit America's Favorite Island[®]. Striking that balance is a responsibility we take very seriously.

It's not about the quantity of visitors who choose our destination, it's about continuing to attract those visitors who respect our values and our

environmental sensitivity. Using this approach ensures the success of our economy with the environmental stewardship we're known for worldwide.

This community first approach is something you'll see in the pages of our marketing plan developed in concert with our community and industry professionals. We're listening to our residents with our annual resident sentiment survey and community outreach efforts. Our marketing plan is laser-focused on responsible tourism in concert with building awareness among travelers.

Competition for share-of-voice among travelers is now more competitive, more now than ever post pandemic. Great brands don't take their foot off the gas pedal of marketing. It's critical that we remain top-of-mind with upscale travelers since the world has reopened for tourism.

The plan is also about discovery, helping visitors discover those aspects of the island that go beyond our beautiful beaches. We're passionate about the island's history and culture and the authentic stories that resonate with today's visitors who want to immerse themselves in the culture and local flavor of where they travel.

There's a reason we're chosen again and again by the readers of *Condé Nast Traveler* and others as America's #1 Island. Thank you to our residents, Board of Directors, Marketing Council and community leaders for their commitment to Hilton Head Island. It's this partnership that shapes our future.

Sincerely,

William G Miles, IOM, CCE

President & CEO

Hilton Head Island-Bluffton Chamber of Commerce

2023 BOARD OF DIRECTORS

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Hilton Garden Inn

IMMEDIATE PAST CHAIR

Chris McCorkendale

Operation Patriots Forward Operating Base

VICE CHAIR, BLUFFTON REGIONAL BUSINESS COUNCIL

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Technical College of the Lowcountry

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Center for Strategic Planning -**USCB**

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Ahmad Ward

Historic Mitchelville Freedom Park

VICE CHAIR. MEMBERSHIP

Andrew Carmines

Hudson's Seafood House on the Docks

VICE CHAIR. **SMALL BUSINESS**

Andrea Bragg

Forsythe Jewelers

VICE CHAIR, VISITOR & CONVENTION BUREAU

Caleb Graham

Ocean Oak Resort by Hilton Grand Vacations

VICE CHAIR. WORKFORCE & EDUCATION

Jay Wiendl

The Beach House Resort, Hilton Head

PRESIDENT & CEO

William G. Miles, IOM, CCE

Hilton Head Island-Bluffton Chamber of Commerce

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Chris Corkern

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Savannah/Hilton Head International Airport

Diana McDougall

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Dr. Al Panu

University of South Carolina, Beaufort

Grace Stepp

Disney's Hilton Head Island Resort

Joel Taylor

Hilton Head Island Regional Healthcare

Mike Tiahe

Westin Hilton Head Island Resort & Spa

Steve Wilmot

Heritage Classic Foundation

Alan Wolf

SERG Restaurant Group

FY 2023-2024 MARKETING COUNCIL MEMBERS

The Hilton Head Island Marketing Council serves as an advisory and advocacy committee to the Hilton Head Island Visitor & Convention Bureau. The Council represents cross sections of the island's diverse travel and tourism industry and guides the planning and execution of the annual Destination Marketing Plan. The Council also includes representatives from the Town of Hilton Head Island Town Council and Staff. The committee monitors the plan's effectiveness and results making recommendations for improvements and enhancements when needed.

Vice Chairman, Visitor & Convention Bureau

Caleb Graham

General Manager, Ocean Oak Resort by Hilton Grand Vacations

Arts Seat

Natalie Harvey

Director of Cultural Affairs Town of Hilton Head Island

Attractions Seat

Rex Garniewicz. Ph.D.

President & CEO

Coastal Discovery Museum

Convention Property Seat

Teresa Manzolillo

Director of Sales and Marketing Marriott Hilton Head Resort & Spa

Convention Property Seat

John Munro

Vice President of Hospitality The Sea Pines Resort. Resort Sales & Marketing

Cultural/Historical Seat

Courtney Young

President/CEO

ForeSight Communications, LLC

Ecotourism Seat Mike Overton

Founder & CEO Outside Brands **Entertainment Seat**

Ryan Larson

Director of Marketing SERG Group

Festival & Event Seat

Lindsey Harrell President

Hilton Head Island Concours d'Elegance & Motoring Festival

Golf Seat

Brad Marra

Chief Operating Officer Palmetto Dunes Oceanfront Resort

Home & Villa Seat

Dru Brown

Managing Partner Island Time Hilton Head

Outdoor Recreation/ Sports

Julie Jilly

Vice President

Professional Tennis Registry

Restaurant Seat

Catherine Reilley

Director of Marketing and Operations

Coastal Restaurants & Bars (CRAB)

Retail Seat Beth Patton

Marketing Manager Forsythe Jewelers

Transportation & Tours Seat Lori Lynah

Director of Marketing and Air Service Development

Savannah/Hilton Head International Airport

Transportation & Tours Seat

Jon Rembold

Executive Airport

Airports Director Hilton Head Island Airport/Beaufort

Town Council

Councilman David Ames

Ward 3

Town Representatives Josh Gruber, JD, MPA

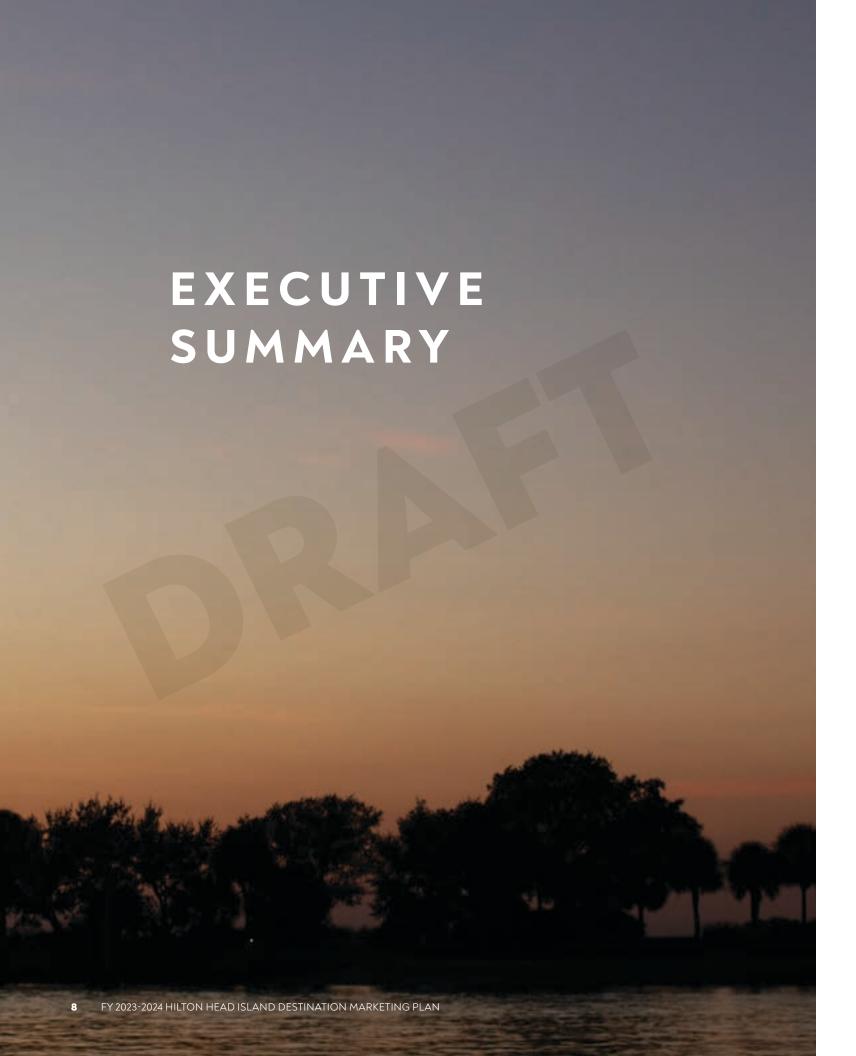
Deputy Town Manager Town of Hilton Head Island

Angie Stone

Assistant Town Manager Town of Hilton Head Island

Kelly Spinella

Marketing & Social Media Manager Town of Hilton Head Island



A LOOK BACK

In FY 2022-2023, we immersed ourselves deeply in the fabric of our community, built strong relationships with residents, local business, and continued our educational outreach efforts among guests and potential guests about supporting our delicate ecosystem.

We also focused on disbursement of visitor across the island, using our marketing efforts, strategies and tactics, earned channels to draw awareness to experiences beyond our pristine beaches and most well-known sites.

A LOOK AHEAD

In FY 2023-2024, all marketing efforts are designed to drive awareness and qualified visitation to the destination in a way that supports and nurtures residents' quality of life and supports our destination's strategies.

DESTINATION STRATEGIES

- IMPLEMENT THE COMMUNITY CORNERSTONE PLAN.
- CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE.
- CREATE AN UNDERSTANDING OF, AND RESPECT FOR OUR DELICATE ECOSYSTEM (RESIDENTS AND VISITOR).
- DRIVE DEEPER DISCOVERY AND EXPLORATION OF OUR DESTINATION.
- 5 BUILD BRAND AWARENESS.
- ENHANCE LEISURE & GROUP BUSINESS THROUGH QUALIFIED VISITATION.



IT STARTS WITH A VISIT

As a community built upon tourism it is imperative to ensure the destination for the next generation of residents, business owners, and visitors.

As the Destination Marketing Organization (DMO) we are experts in this space, constantly working to ensure the community's priorities and stewardship of the brand that ultimately ensures the quality of life for all.

The FY 2023-2024 Destination Marketing Plan ladders into our organization's three-year Strategic Plan and ultimately into our community-centric 10-year Destination Management Plan. Our approach to long-term tourism success sits alongside the Hilton Head Island community's 20-year comprehensive plan. Our efforts complement and support a vibrant and collaborative partnership with the Town of Hilton Head Island to ensure the future of the destination for residents and tourists.

DESTINATION MANAGEMENT PLAN

This 10-year plan, aligned with the Town's 20-year comprehensive plan, helps ensure the continued growth of our tourism industry while safeguarding the idyllic way of life for those that live and work here.

The plan provides a platform for community engagement. It includes input from residents, business and government leaders, and stakeholders on the strategies needed to ensure the long-term success of our destination. The Destination Management Plan enables a shared vision for our community, and creates strategies to address such areas as sustainable growth, product development, consumer expectations, and other socio-economic factors.

STRATEGIC PLAN

The goal of the three-year Strategic Plan is to ensure alignment with our Board of Directors and collaborative efforts with our partners and community. The plan is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.

In February 2021, our Board of Directors approved and adopted the 2021-2023 Strategic Plan. The plan is organized around these five strategic goals:

- 1. Improve Alignment & Community Engagement
- 2. Grow Local Business
- 3. Expand Meetings & Groups
- 4. Energize Destination Development & Management
- 5. Sustain and Innovate as an Organization

We are in the process of updating this plan which will align with our new fiscal year efforts and be in place for FY 2024-2026.

MARKETING PLAN

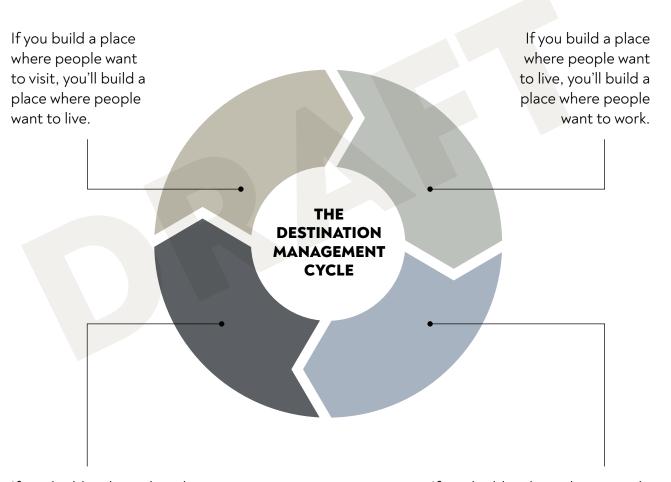
The Destination Marketing Plan is an operational one-year document that outlines our overarching goal, strategies, and tactics for the coming fiscal year that our organization will implement to generate brand awareness and demand regarding tourism. It is built on strategies and tactics to achieve our yearly goal and ultimately aligns with the Strategic Plan and Destination Management Plan initiatives.

VISION

A welcoming, world-class community embracing nature, culture and economic vibrancy for residents and visitors.

- MISSION

Stimulate the regional economy while enhancing the quality of life for all.



If you build a place where business needs to be, you'll build a place where people have to visit.

If you build a place where people want to work, you'll build a place where business needs to be.

FY 2023-2024 HILTON HEAD ISLAND DESTINATION MARKETING PLAN

DEFINING OUR COMMUNITY CORNERSTONE

Our community is the heart of who we are and how we present ourselves to the world. Tourism is a competitive landscape. Every destination must compete with every other tourism destination for its share of the world's attention, visitation, and investment. A destination needs to integrate the community into marketing efforts to create the desire amongst travelers to want to experience the destination and meet its people and experience its authentic offering.

For any destination to ensure its competitive advantage and increase visitor revenue, there must be a clear strategic framework for developing, articulating, and promoting the destination brand. That is why destination marketing and management organizations exist. They have the unique mandate to steward the community's identity and reputation in the global visitor marketplace on a daily basis.

A destination brand is rooted in the community's priorities. It is a common good and a shared value. Promoting the destination is for the benefit and well-being of everyone in the community. Therefore, the stewardship of the brand is an essential investment for enhancing the quality of life and increasing opportunities for all residents.

The Chamber warrants and represents that the marketing plan shall include a "Community Cornerstone Plan" which engages the community with public relations, education, and social media strategies.

DESTINATION VALUES







ARTS

CULTURE

ENVIRONMENT







HISTORY

RECREATION

WELLNESS

DESTINATION ATTRIBUTES







BIKING

CULINARY

GOLF









& GROUPS

RETAIL

PICKLEBALL

DESTINATION STRATEGIES

A PLAN OF ACTION. A VISION FOR THE COMMUNITY.

Through digital, social, media, and print channels, we will compel our potential visitors to explore the Lowcountry's natural beauty, culture, heritage, arts, culinary, and outdoor experiences. Woven into everything we do, is the fabric of our community and a commitment to empowering them to tell the Hilton Head Island story and to helping to be good stewards for the island.

OVERARCHING GOAL

Maintain Hilton Head Island quality of life through driving qualified visitation to the destination

- IMPLEMENT THE COMMUNITY CORNERSTONE PLAN.
- CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE.
- CREATE AN UNDERSTANDING OF, AND RESPECT FOR OUR DELICATE ECOSYSTEM (RESIDENTS AND VISITOR).
- DRIVE DEEPER DISCOVERY AND EXPLORATION OF OUR DESTINATION.
- 5 BUILD BRAND AWARENESS.
- ENHANCE LEISURE & GROUP BUSINESS THROUGH QUALIFIED VISITATION.



COMMUNITY CORNERSTONE PLAN

2024-2026

FOSTER EFFECTIVE AND INCLUSIVE **COMMUNITY COLLABORATION**

Aligning the priorities of residents, industry stakeholders, small business, community groups and government organizations that balance and enhance resident quality of life and overall destination performance.

INITIATIVES

Develop social, cultural and environmental sustainability initiatives to engage locals and visitors.

TACTICS

Continue to build out and promote The Promise campaign, a VCB initiative that promotes the importance of our environment and efforts to protect and preserve our delicate ecosystem.

Bring awareness to environmental programs; e.g. Loggerhead Sea Turtles, Dolphins, Piping Plovers through The Promise campaign, through touchpoints such as a Sustainability Tool Kit and e-Commerce platform.

Partner with Coastal Discovery Museum, Outside Foundation, Sea Turtle Patrol, & Office of Cultural Affairs creating in-depth programming to further emphasize the importance of our environment.

Continue ongoing resident sentiment survey program that measures and tracks support for the local visitor economy. Publish the results on a regular basis for ongoing conversation.

Implement annual resident sentiment survey.

Present findings to key stakeholders; Town, residents, businesses partners, etc

Benchmark and update resident sentiment results annually.

Conduct live and virtual community speaking engagements, community updates regarding tourism and surveys on a regular basis to gain resident feedback on quality of life.

Host bi-annual community engagement events.

Regular cadence of Chamber driven communications to local businesses, e.g. Monthly Power Hour, Monday Briefing, Chamber social, Chamber website, email campaign, regional and local media outlets.

Designated resident & community communications, outreach and informational meetings.

Deployment of annual resident sentiment surveys.

Develop community-wide programs to increase awareness and support of tourism & hospitality as a key economic driver providing growth opportunities

Connect with USCB and develop a Brand Boot Camp program. These could be extensions of the existing Island Ambassador Program or a hybrid program.

In partnership with USCB, create a Brand Tool Kit to complement the program. Once a business engages with the program, the BrandTool Kit would be a leave behind local businesses could use to showcase through their channels.

Tourism economy health check -town integration/ cadence 1x per year.

Further invest in data management platforms and community crowdsourcing tools to ensure intelligent. data-driven decision making, and resident priorities across all levels of the public and private sector.

 ${\sf Data\ management\ platform\ examples:\ Zartico,\ Simpleview,\ Keydata.}$

Hiring dedicated headcount to support these new platforms and analytics.

Liaise with community counterparts to share insights and promote a data-driven ecosystem for the destination

		,	TIMING	
•				•
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber		٠		15% of local businesses featuring promise seals (all businesses).
Town/Chamber/ Businesses		•		Number of Sustainable Toolkit downloads/engagements.
Chamber/Town		•		Create programs with partners with budget to support.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber	•		•	Growth in number of surveys completed YoY.
Chamber	•		•	Completion of presentations to stakeholders annually.
Chamber	•		•	$\label{thm:monitor-constraints} \mbox{Monitor YoY increase/ decrease in sentiment and address accordingly}.$
Chamber	•			Event participant numbers.
Chamber	•			Impressions & engagement, and open rate.
Chamber	•			Number of meetings held. Number of attendees, reach and open rate. $ \\$
Chamber	•			Number of surveys sent. Number of surveys completed.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber		•		$\label{thm:program} \mbox{Development of Brand Boot Camp Program in partnership with USCB.}$
Chamber			0	10% of island businesses have engaged with the Brand Boot Camp program and are using the Brand Tool Kit.
Chamber/Town	۰			Contract deliverable, 1x per year.

LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber	•			Establish platforms and set up reporting efforts (internal to Chamber).
Chamber		•		Hiring completed.
Chamber		•		Create comprehensive reports and discuss and establish cadence for reporting out and sharing insights.

COMMUNITY CORNERSTONE PLAN (CONTINUED)

2024-2026

ATTRACT EXTRAORDINARY TALENT

Resident quality of life and a positive visitor economy and brand are directly proportional to the quality of the local workforce. This must be prioritized more than ever before to ensure quality of life for residents and a positive visitor experience.

Assist in the awareness of career opportunities and recruitment of talent for all residents and throughout the region.

Assess availability of existing structures and government-owned land to potentially develop workforce housing on/off island.

Work in partnership and enhance industry workforce development initiatives with the public sector, area schools, and industrypartners.

Develop strategic understanding of requirements for hiring senior and strategic talent to support local businesses in their talent search.

Enhance and promote awareness of hospitality and cultural training programs in collaboration with local educational institutions and industry partners.

TACTICS

Start a local job sourcing platform pulling in local career opportunities.

Simultaneously position the Lowcountry lifestyle and real estate opportunities within this framework. e.g. aggregate all real estate listings, pull in VCB channels to showcase lifestyle.

Showcase the diversity of career opportunities that exist throughout the destination.

Chamber to establish a working relationship with the Affordable Housing Committee to understand current efforts in place, plan for future efforts, and overall need that Hilton Head Island can support.

Town and Chamber representatives work closely to understand the private initiatives on island that are, or have implemented, workforce housing for their employees. exp:

The Sea Pines Resort

Town works to identify grants and other funding opportunities to support affordable workforce housing efforts on island.

Introduce new, formalized internship programs within the Lowcountry that include diverse offerings and hiring opportunities postintern ship.

Work to enhance presence with TCL/ Culinary Institute/ USCB/ high school guidance counselors/ career fairs in an effort to build support for tourism and hospitality as a long-term viable career.

 $Chamber's \ continued \ support\ of\ SC\ Apprentice\ Program,\ Chamber\ Junior\ and\ Senior\ Leadership\ programs\ that\ support\ the\ retention\ efforts\ regarding\ workforce\ and\ the\ tourism\ industry\ for\ this\ region.$

Survey large, local hospitality businesses (The Sea Pines Resort etc.) and compile resourcing roadmap for required senior-level and strategic talent.

Conduct salary analysis and competitive hiring practices in comparable communities.

Understand and support collaborative efforts to ensure a competitive landscape on salaries, benefits and lifestyle opportunities.

Establish a joint social media campaign between the Town and Chamber that speaks to the Live, Work, Play opportunities on Hilton Head Island.

Create and promote a tourism & hospitality industry recruitment video.

TIMING

•				•
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber/Town		0		Successful launch of job portal.
Chamber		•		Establish relationships with local realtors / communities and work to pull in their listings and community detail to the site.
Town		•		The platform shows many different types of job options with a filter feature.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Town/ Chamber		•		Relationship established between the Town, the Chamber, and the Committee.
Town/Private Partner/ Chamber				Town and Chamber have identified and established relationships with island partners.
Town/ Chamber				10% of funding opportunities identified to support overarching plan.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Beaufort County/ Town/ Chamber		•		Create regional partnership program.
Beaufort County/ Town/ Chamber	•			Number of guidance counselor meetings held, number of career fairs attended.
Chamber	0			Annual reporting on SC Apprentice Program engagement and support. Reporting out on Leadership class community engagement and class projects.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Town/Private Partner/ Chamber		•		Establish base understanding and create a Hilton Head Island senior-level recruitment handbook.
Town/Private Partner/ Chamber		0		Report on comparable towns/cities and their hiring efforts.
Town/Private Partner/ Chamber			0	Report out on partner offerings/ packages in efforts to establish competitive effort for recruitment.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber/Town		۰		Create and implement program. Establish key metrics for measurement.
Chamber/Town		0		Confirm creation of video and plan to support promotion.

COMMUNITY CORNERSTONE PLAN (CONTINUED)

2024-2026

DIVERSIFY THE VISITOR & LOCAL EXPERIENCE YEAR-ROUND

More varied and integrated culinary, arts, cultural, historical, wellness, active, retail and evening experiences will attract high-value visitors who spend more, stay longer, and explore more of the destination.

INITIATIVES

Develop and promote the entirety of Hilton Head Island as a connected and easily navigable ecosystem of parks, beaches, and other outdoor spaces, as outlined in the Parks & Rec Master Plan and dispersion tactics.

Develop a local culinary, arts & cultural network/ trail to improve regional connectivity, showcase small businesses and unique local history, drive visitor dispersal, and provide suggestions for inclement weather days.

Enhance and support the historic and cultural locations on the island-programming and promotion.

Diversify the visitor by sharing different perspectives and representation across marketing touchpoints.

TACTICS

Onsite QR code or App mapping technology designed to lead visitors deeper into the destination and to help them discover new-to-them experiences.

Influencer partnerships designed to showcase itineraries based on visitor interest. Work with partners to make these experiences plannable, bookable, and part of a cohesive itinerary. Immersive itineraries distributed through personalized media and technology platforms.

Develop mapped itineraries that can be filtered by interest/topic.

Sister partnerships/exchanges and sharing of ideas to create a FIC product.

Continue to bring forward Gullah cuisine and highlight locations, chefs and dishes that represent the rich history of our area/region.

Continued partnership with Historic Mitchelville Freedom Park through paid media, creative campaign strategy, and marketing roadmap.

Continue to develop art, culture and history tour programming with interactive interpretive panels that can be used to build awareness for the artist, their products and the importance of their role in enhancing the culture of the destination.

Continue the promotion of performing arts and cultural programming.

Increase diversified representation in marketing materials through a new photoshoot showcasing diverse talent.

Amplify local voices who can tell potential visitors about our culture and unique experiences in authentic ways through digital videos, email newsletters, and blogs.

Work with content creators and influencers who provide unique and diverse perspectives on travel.

TIMING

				•
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber/Private Partner/Town		•		Partner with Town on QR code platform, content creation and strategy for partner placement.
Chamber/ Private Partner		•		Influencer partnership secured and itinerary efforts in place for capture.
Chamber/ Private Partner			•	Itinerary page sessions, engagement and conversions.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber		•		Details on how many itineraries have been developed.Report out on number of engagements/sessions for this program.
TCL / Drivete Destroye				Development of a FIC and deat

Chamber		Details on how many itineraries have been developed. Report out on number of engagements/sessions for this program.
TCL/ Private Partners		Development of a FIC product.
Chamber/Gullah Community		Impressions and engagement on platforms where content is placed.

LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Stakeholder/Town/ Chamber		•		Develop a robust marketing campaign. Measure and report out on earned media coverage. Report out on website sessions.
Stakeholder/Town/ Chamber		•		Partner with the Office of Cultural Affairs to identify, outreach and confirm partners for this program.
Chamber		•		Report out on website sessions to arts & culture content.

LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber	0			Completion of shoot.
Chamber	0			Number of locals involved in program/sessions to their content
Chamber		0		Establish an Influencer program: details of campaign, identify talent and budget

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COMMUNITY CORNERSTONE PLAN (CONTINUED)

2024-2026

MODERNIZE MEETING & EVENT CAPABILITIES FOR THE FUTURE

Meeting and event planners today have a vast array of new technologies to drive audience engagement and business development. Destinations and their industry partners must have the required infrastructure and shared vision to deliver the event experience that today's attendees expect.

Develop an arts, cultural & entertainment district with recreation and event facilities appropriately designed to fit our community and development aesthetic. Bring the Parks and Rec Master Plan forward and learn about upcoming integration touchpoints and opportunities. Develop branding and marketing approach for an arts, cultural & entertainment district. Partner with the Town of Hilton Head Island on building out a strategy for Island branding. Collaborate with the Town of Hilton Head Island to create a cohesive branding strategy for the island.

Seek a 5-star property or resort designation to further elevate the Hilton Head Island brand in the luxury leisure and group marketplace.

Evaluate current incentives for investment in new and existing venue capital to compete with other like-size coastal destinations.

Develop outreach plan and strategy for hospitality brands that align with Hilton Head Island's current offerings and existing corporate presence on-island. (For example, this initiative would be designed to plan and pitch Hilton Head Island to corporations such as Marriott to consider an Autograph Collection property on-island).

 $Conduct \ competitive \ assessment \ to \ evaluate \ our \ destination \ compared \ to \ other \ like-minded \ destinations \ and \ competitive \ product \ offerings.$

Collaborate with our local and state representatives to inform, educate and influence decisions as it relates to capital investment and infrastructure funding.

Work to develop holistic economic development strategy influenced by the 10-year destination management plan.

TIMING

•				
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Town/ Chamber		۰		Schedule time with the Town Staff/ Lead POC to walk through the Parks & Rec Plan.
Chamber/Town				Scope of work established that includes timing, assets and budget.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Town/ Chamber				Identify Town Staff POC and work with them to understand and determine the scope of work and budget for this project.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Town/Private Partner			٠	Support the development/ redevelopment of a 5-star property.
LEAD	FY 2024	FY 2025	FY 2026	KEY PERFORMANCE INDICATORS (KPIs)
Chamber/Town/ Private Partners	•			Competitive assessment presentation.
Chamber/ Town/ Private Partners	•			Demonstrable influence on infrastructure decisions.
Town/ Private Partners/ Chamber			•	Economic strategy developed.

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COMMUNITY CORNERSTONE PLAN (CONTINUED)

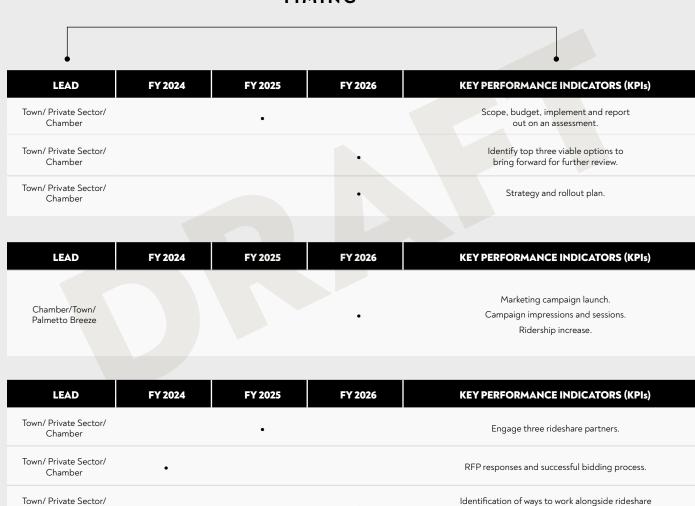
2024-2026

IMPROVE MOBILITY & CONNECTIVITY TO SUPPORT LOCAL BUSINESSES

Mobility and connectivity support greater opportunities for residents, visitors, and industry stakeholders. Continue to connect visitors and local businesses, both physically and digitally, to drive resident satisfaction, higher conversion, and increase incremental sales.

INITIATIVES	TACTICS
Upgrade broadband infrastructure with 5G/Ultra wideband capacity across gated, non-gated communities, business plazas, and public spaces.	Conduct needs assessment by evaluating current infrastructure. Evaluate solutions through collaboration with partners throughout the destination. Develop and implement strategy for delivering 5G/ Ultra wideband throughout the destination.
Promote multimodule access to public transportation in support of local resident and visitor movement to/ from the island as well as throughout the island.	Develop dedicated marketing campaign for visitors promoting the trolley system/integration in market.
Increase rideshare and airport transportation options.	Set up meetings with rideshare companies to discuss driver recruitment strategies and partnership opportunities. Prepare and release RFP for official regional shuttle/bus services. Work with key stakeholders and the community to influence current rideshare regulations and constraints that limit cross-state transportation opportunities.

TIMING



regulations and serve residents and visitors.

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Chamber

STRATEGIES 2-6 STRATEGIES CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE

CREATE AN UNDERSTANDING OF AND RESPECT FOR OUR DELICATE ECOSYSTEM





ENHANCE LEISURE AND MEETING AND GROUP BUSINESS BY SUPPORTING QUALIFIED VISITATION

TACTICS

Community campaign and brand bootcamp Resident and visitor surveys Put the Beach to Bed campaign

Eco Campaign

Lead generation ads Island Time Blog Paid social media Search optimization Social media video/Reels/stories User generated content Chatbot evolution and optimization Digital experience personalization

Digital display Connected TV and traditional broadcast Programmatic advertising Audio advertising Traditional ad placements (print and digital) Social media marketing (Facebook, Instagram, Spotify, Pinterest, Twitter) User generated content curation Public relations (media outreach, partnerships, influencers, and earned media placements)

Email marketing Social and display remarketing advertising Search engine marketing Search engine optimization and local search Digital experience personalization LinkedIn (organic and paid) Networking Meetings and groups paid digital media

TIMING

•			
LEAD	FY 2024	KEY PERFORMANCE INDICATORS (KPIs)	FY 2023 RESULTS
Chamber		Community sentiment survey and continued benchmarketing Visitor Profile study	Community sentiment survey completed, analysis can be referenced in the Appendix Visitor Profile Study completed, analysis can be referenced in the Appendix
Chamber	•	Campaign landing page visits	Turtle landing page: Metrics: 26,685 Sessions:2,682
Chamber	·	Increase email signups Increase time spent on blog Increase social referrals Increase in content engagement metrics Chatbot AI development	Email list growth of 143,826 (8.9%) Time spent on blog 3:04 (flat) Social referrals 345,816 (+12.4%) Bounce rate 46% (-8.8) Time on site 1:50 (+2.1%) Pages per visit 1.8 (+2.2%) Chatbot engagements 2,685 (+60.3%)
Chamber		Brand lift study Website traffic Paid media impressions	Brand lift study being conducted spring 2023 Website traffic 3,064,623 (-10.2%) 129 million paid partner media impressions
Chamber		Website traffic Partner referrals Home and villa occupancy Hotel occupancy Direct solicitation for meeting/group	Website traffic 3,064,623 (-10.2%) 1,610,210 partner referrals (-5.2%) Home and Villa OCC 45% (+4%) ADR \$496.00 (+13%) RevPar \$221.00 (+18%) Hotel OCC 59.7% (-2.2%) ADR \$246.82 (+2.9%) RevPar \$147.39 (+0.7%)

(phone, email, social media Sales appointments (sales calls, trade shows, virtual) Leads sent to properties

OCC 59.7% (-2.2%) ADR \$246.82 (+2.9%) RevPar \$147.39 (+0.7%) Direct solicitations 535 (phone calls, emails, social outreaches)

Sales appointments 352 101 (+73.2%) leads sent to properties

2023-2024 MARKETING ROADMAP

Our strategic roadmap outlines the key milestones across strategies and tactics that will help the destination maintain momentum and drive results.

JUL-AUG

CAMPAIGNS

Southern Living
South's Best Voting

CONTENT THEMES

Lowcountry Living/Summer Fall Travel

TRADITIONAL MEDIA PLACEMENTS*

Travel + Leisure
Condé Nast Traveler
Full-Time Travel
Garden & Gun
Kingdom Magazine
Departures
Smithsonian

Martha Stewart Living, Weddings

SEP-OCT

CAMPAIGNS

Gullah Food Festival Oyster/Dining Digital Campaign Crescendo

Concours d'Elegance

CONTENT THEMES

Weekend Getaways

Lowcountry Dining (Oyster Season)

TRADITIONAL MEDIA

Travel + Leisure
Condé Nast Traveler
Full-Time Travel
Garden & Gun
Kingdom Magazine
Departures
Smithsonian

Martha Stewart Living, Weddings

NOV-DEC

CAMPAIGNS

Holiday Travel Giving Tuesday Seafood Festival Wine + Food

CONTENT THEMES

Thanksgiving Holidays

TRADITIONAL MEDIA PLACEMENTS*

Travel + Leisure
Condé Nast Traveler
Full-Time Travel
Garden & Gun
Kingdom Magazine
Departures
Smithsonian
Martha Stewart Living, Weddings

JAN-FEB

Foodie February Gullah Celebration

CAMPAIGNS

Wine + Food Seafood Festival Piano Competition

Restaurant Week

Travel + Leisure Voting

Darius Rucker Golf Tournament

CONTENT THEMES

Fresh Start Lowcountry Love

PROJECT MILESTONES

Website - Strategy, IA, Designs Brand Refresh Documentation Complete Summer Campaign Development Begins Heritage activation and campaign planning

TRADITIONAL MEDIA PLACEMENTS*

Travel + Leisure

Condé Nast Traveler
Full-Time Travel
American Express
Garden & Gun
Kingdom Magazine
Departures
Smithsonian
Martha Stewart Living, Weddings

MAR-APR

CAMPAIGNS

RBC Heritage Travel + Leisure Voting Condé Nast Traveler Voting

CONTENT THEMES

RBC Heritage Spring in Swing: Golf, Fishing, Biking

PROJECT MILESTONES

Website - Visual Designs and
Creative Copywriting

RBC Heritage Campaign Launches:
Digital Media, Influencers, Activation

TRADITIONAL MEDIA PLACEMENTS*

Travel + Leisure
Condé Nast Traveler
Full-Time Travel
American Express
Garden & Gun
Kingdom Magazine
Departures
Smithsonian
Martha Stewart Living, Weddings

MAY-JUN

CAMPAIGNS

Sea Turtle Conservation
Condé Nast Traveler Voting
NTTW Summer Campaign
Pedal Hilton Head Island
Juneteenth Celebration

CONTENT THEMES

Wildlife/Conservation Ready for Summer

PROJECT MILESTONES

Website - Development, Testing & Launch before Jun 30, 2022 Summer campaign launches

Martha Stewart Living, Weddings

TRADITIONAL MEDIA PLACEMENTS*

Travel + Leisure

Condé Nast Traveler Full-Time Travel American Express Garden & Gun Kingdom Magazine Departures Smithsonian

30 FY 2023-2024 HILTON HEAD ISLAND DESTINATION MARKETING PLAN
HILTONHEADISLAND.ORG 31

^{*}Traditional media placements are examples and could adjust throghout the year depending on coverage opportunities and alignment with specific strategies and tactics throughout the marketing plan.

BUDGET

OF COMMERCE HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COAHIton Head Island Visitor & Convention Bureau Schedule of Functional Revenues and Expenditures FY 2023-2024 BUDGET

	TOTALS	DWO	Private Sector	Dest. Specific	Co-obs	Bluffton DMO	DMO	
Revenues	* 000 000	1 000 000						
Iown of HHI DMC - State ATAX	4,675,000	4,6/5,000						
Private Sector	200,000		200,000					
SCPRT Destination Specific	825,000			825,000				
SCPRT Coop	425,000				425,000			
Private Match Coop	2,500,000				2,500,000			
Town of Bluffon DMO	425,000					425,000		
B/C Bluffon & Daufuskie	385,000						385,000	
Total Revenues	9,735,000	4,675,000	200,000	825,000	2,925,000	425,000	385,000	
Membership Revenue								1,800,000
Total Revenues with Membership	11,535,000							
Expenses								
Media Buys - Leisure	1,225,000	966,416	86,716	191,868				
Dorhar Drawaline	00000	355 47	9 200	902.0				
Part Social Media	150,000	118 337	8 169	23.494				
Social Media Management	90,000	71,002	4.902	14,096				
	000	000 000	40.000	40.000				
onn-total	300,000	230,573	10,339	40,900				
Digital Marketing	7000000							
Digital Strategy, Web Maintenance & Support	85,000	67,057	4,629	13,313				
Technology Improvements	75,000	59,168	4,085	11,747				
SEO	30,000	23,667	1,634	4,699				
SEM / Display	529,000	417,334	28,810	82,856				
Managed Web Hosting and Content Delivery Network	3,000	2,367	163	470				
eNewsletter/Drip Campaign	75,000	59,168	4,085	11,747				
Digital Contingency	10,000	7,889	545	1,566				
Sub-total	807,000	636,651	43,951	126,398				
Destination PR								
PR Strategy, Maintenance & Support	275,000	216,951	14,977	43,072				
Journalists/Influencers/Parternships	95,000	74,947	5,174	14,880				
Monitoring Services (Print/Online/Broadcast Tracking)	25,000	19,723	1,362	3,916				
PR Contingency	75,000	59,168	4,085	11,747				
Sub-total	470,000	370,788	25,597	73,615				
Group Sales & Marketing								
Promotional Giveaways	000'06	71,002	4,902	14,096				
Site Inspections/ Flights for Sites	3,000	2,367	163	470				
VCB Dues and Subscriptions	105,000	82,836	5,719	16,446				
Tradeshows	85,000	67,057	4,629	13,313				

FAIN / In-Market Events	000'66	45,390	2,995	4,614			
Focused Service	4,000	3,156	218	627			
SC Sports Alliance	0000'9	4,733	327	940			
SEM	20,000	39,446	2,723	7,831			
Social Media	89,000	70,213	4,847	13,940			
Sub-total	487,000	384,200	26,523	76,277			
Infernational							
Coastal SC USA Coop	000.09	47.335	3.268	9.398			
International Promotions	95,000	74,947	5,174	14,880			
International Tradeshows	20,000	39,446	2,723	7,831			
Sub-total	205,000	161,727	11,165	32,109			
Destination Photography & Video	150,000	118,335	8,169	23,494			
Insiders/Collateral/Fulfillment							
Vacation Planner	350,000	276,119	19,062	54,819			
Fulfillment	150,000	118,337	8,169	23,494			
Toll-Free Phone	6,000	4,733	327	940			
Sub-total	206,000	399,189	27,558	79,253			
Research & Planning	221,851	175,021	12,082	34,748			
Snorts Marketing - Town of HH	000 000	000 000					
Choice manage 1 control of the contr	200,002	200,000	l				
VCB Sales, Mkt, Services & Ops:							
Personnel	1,242,500	718,200	183,330	98,175	50,575	95,200	97,020
Benefits	177,500	102,600	26,190	14,025	7,225	13,600	13,860
Operations	355,000	205,200	52,380	28,050	14,450	27,200	27,720
Sub-total	1,775,000	1,026,000	261,900	140,250	72,250	136,000	138,600
SCPRT							
SC PRT - Leisure	1,193,150				1,193,150		
SC PRT - Sports	887,000				887,000		
SC PRT - Meetings & Groups	772,600				772,600		
Sub-total	2,852,749				2,852,750		
Town of Bluffton DMO							
Promotions	289,000					289,000	
B/C Bluffton & Daufuskie DMO							
Promotions	246,400						246,400
TOTAL VCB EXPENSES	9,735,000	4,675,000	200,000	825,000	2,925,000	425,000	385,000
Difference btw Revenue & Expense	0	0	0	0	0	0	0
Total Expenses with Membership	11,535,000						
Revenues Minus Expenses:	0						
	Revenues & Expenses for HHI-related marketing programs	s for HHI-related ma	rrketing programs				

DEMOGRAPHICS AND PERSONAS

Hilton Head Island's visitor foundation was built on identified drive markets, ensuring overnight stays and from a long-term lens, home ownership. We nurture that foundation and look to our real-time data sources, such as Google Analytics and Zartico, in addition to research, partnering with the Office of Tourism Analysis at the College of Charleston and the University of South Carolina Beaufort. Using these insights we are able to extract visitor persona detail which allows us the ability to further refine our messaging to a more qualified potential consumer.

As we adjust to the ever-evolving traveler needs, we will continue to keep our demographics and key personas at the forefront. We look to continue to expand our drive radius and keep focus on our shorthaul fly markets, supporting new airlift as it becomes available both domestically and internationally.

We have identified the following key persona groups as:

- Families
- Arts, History and Cultural Enthusiasts
- Wellness Traveler
- Sports Enthusiasts
- Culinary Explorers
- Snowbirds
- Weekenders
- International Travelers

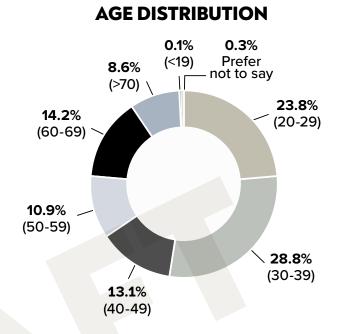


OUR TARGET LEISURE TRAVELER

2022 VISITOR PROFILE STUDY









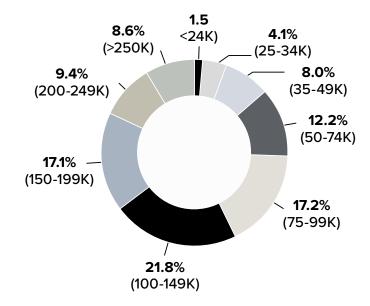




2-4 Trips per Year

7 Nights Average Length of Stay

HOUSEHOLD INCOME DISTRIBUTION



*2022 Visitor Profile Study: Office of Tourism Analysis, College of Charleston PRIVILEGED AND CONFIDENTIAL PRIVILEGED AND CONFIDENTIAL

MARKETING PLAN STRATEGIES & TACTICAL DETAILS

The ultimate goal of the marketing strategy is to drive visitation to the destination through a series of demand creation and demand capture marketing activations. As outlined previously, not only do the strategies aim to drive qualified visitors to the destination, but also to support the discovery and exploration of new destination experiences that extend past the core product offering that our brand loyalists have grown to love.

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 will report on resident and visitor satisfaction through annual survey results. We have an established process in place for both surveys and will continue with those efforts. Using the results and insights from the first year of this initiative, we will move forward with a comprehensive plan to reach our community.

As part of ongoing engagement and education within the community, we will provide regular tourism updates throughout the year to enhance residents' awareness and appreciation for tourism on Hilton Head Island. Ensuring our number one economy is for the benefit and well-being of everyone in the community. By ensuring the success of tourism to Hilton Head Island, we are stimulating the regional economy while enhancing the quality of life for all.

Each individual campaign that is implemented to drive exposure for the destination will be deployed based on a series of defined goals that align with the overarching goal for the marketing plan. All tactics, creative, campaigns, and overall channel strategies will support the goal and will align with the specific area of the customer journey.

The 2023-24 marketing plan will consist of the following marketing channels:

- » Search Engine Marketing (SEM)
- » Organic & Search Engine Optimization (SEO)
- » Digital Video (YouTube, Social)
- » Connected TV and Broadcast
- » Social Media Advertising
- » Email Marketing and CRM
- » Programmatic Display & Remarketing
- » Audio Advertising on Digital Streaming Platforms (DSP)
- » Trade Marketing
- » Traditional Print, Radio
- » Public Relations and Influencer Marketing

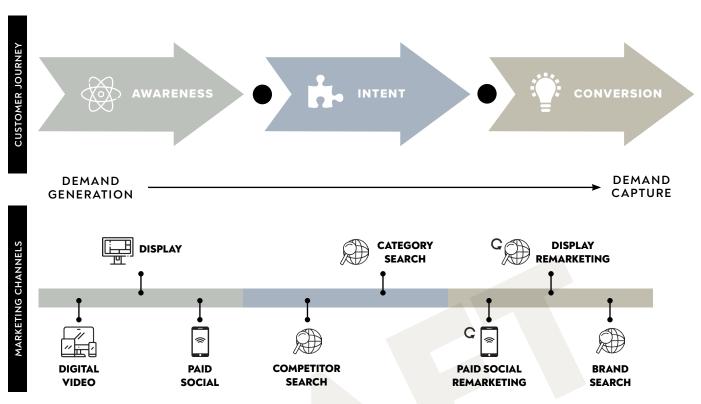
AREAS OF FOCUS

LEADING WITH COMMUNITY IN MARKETING

We will highlight, celebrate, and feature our locals, their businesses, offerings, and unique identities across all our marketing channels and touchpoints. We will strive to add layers of additional authenticity, through stakeholder engagement with festivals, events, arts, our rich Gullah culture and environmental and conservation programs.

This will be done through organic and paid integration across our website, digital, social, blog,

AUDIENCE TARGETING WITH DIGITAL MEDIA



and email channels in the form of copy, photos, and videos that connect our visitors with our community businesses.

LIVING THE HILTON **HEAD ISLAND BRAND**

A refreshed, modernized, and flexible approach to branding was introduced in 2022-2023. The project provided specific guidelines on how to select imagery, photoshoot talent, craft social content, select User Generated Content (UGC) for use across social and the web.

In 2023-2024, we will integrate these efforts even deeper into our marketing strategy and channels. Color palettes across owned and paid channels will change with each season, our brand pattern will be included in more promotional items and outreach materials, and our advertising will become more specific in its remarketing messaging and imagery/ video curation and creation.

Efforts to share the power of the brand throughout our community will include training and knowledgesharing activities, as outlined in the Community Cornerstone Plan on page 16.

ENHANCED DESTINATION WEBSITE PLATFORMS

Hilton Head Island unveiled its new digital storefront to the world in 2023. A fresh design and enhanced user experience mean marketing efforts can work harder and more efficiently to drive referrals to partner sites, messaging, content and engagement.

The website enhancement initiative consists of a new digital experience to support our key areas of focus and initiatives for the destination. Each audience-specific web platform has been designed to showcase the diverse product experience throughout the destination. This is supported by audience-specific itineraries that have been designed to support the overarching goal of the marketing plan.

PRIVILEGED AND CONFIDENTIAL PRIVILEGED AND CONFIDENTIAL

Additionally, a new digital experience for the Gullah Community of Hilton Head Island will be launched in 2023, focused on authentic ways to learn about the culture first-hand. The site will be authentic and engaging to the community it represents.

CONTENT COMMONWEALTH

The production of data-informed content that showcases the destination using our authentic lens is core to the ongoing integrated marketing strategy. The destination no longer operates in an environment where one-off artifacts of content are produced to serve a specific purpose in a particular channel. Instead, as content is produced to support the overall goal of the marketing plan, the strategies will focus on how content can live across the entire marketing ecosystem. This helps all content work harder for the destination while ensuring we connect with the right audience at the right time in their journey with the most relevant content based on their key travel motivators.

Traditional print and broadcast through the website, digital marketing, and social media efforts will share a consistent creative tonality to ensure the brand tone and voice are effectively communicated through each medium.

DIGITAL ADVERTISING

The focus on qualified yet efficient digital media channels is a core focus of the 2023-2024 digital advertising strategy. Our digital marketing efforts will focus on performance marketing channels that will enable the destination to connect with highly qualified audience targets on a cost-effective basis to drive maximum performance for the destination.

Media dollars will be heavily allocated toward performance channels for the overall destination brand as well as the values and attributes mentioned on page 15. This will be supported by digital video and streaming audio advertising efforts to build awareness of the destination.

EMAIL 2.0



Hilton Head Island's email subscriber list has grown to a healthy size, with a high level of engaged users. Moving forward, we are looking to capitalize on their

interest in the destination by serving personalized emails that align with their priorities and interests, as well as automating email campaigns at strategic touchpoints throughout the website.

Focusing on the key values and attributes including environment, arts, culture, history and wellness segments, we'll craft content-specific emails that appeal to audiences with an interest in these areas, along with general email campaigns for the full subscriber list. An automated welcome journey greets new subscribers and introduces them to the destination, while people requesting a visitor's guide will receive an automated journey moving them further into the sales funnel. Hilton Head Island's email efforts will continue to be informed by SEO, key destination terms and micro terms, research and tested and optimized over the course of the year.

VIDEO IN CONTENT MARKETING

Seasonal highlights, color-driven Reels, locak events and programs, and trend-setting TikToks have helped Hilton Head Island's social media evolve past previous years' activities and tactics.

Our priority across all social channels will be focused on video content first, whether that's through 15-second clips or in-depth community interviews.

CAPTURING QUARTERLY CONTENT

We will continually capture content throughout the year to ensure we have high-quality photo and video assets to use across our digital channels.

Each content capture event will be preceded by a shotlist planning session designed to collect assets for initiatives outlined in the calendar in the coming months, with a focus on collecting stills and video for Instagram Reels and TikTok.

This will also support/coincide with events and other on-Island happenings to allow for real-time coverage across social.

By building a bank of owned photo assets and video b-roll we can easily create multichannel content. Our strategy includes:

- » Can easily piece together content to create Reels/TikToks
- » Reuse content in multiple forms
- » Provide fresh, authentic, and engaging content to keep our grid from becoming repetitive
- » Collaborate with influencers who do not have Hilton Head Island content (contests, pre trip promotion, etc.)
- » Create future event and seasonal campaign assets

EVENT CONTENT

We will work closely with our partners to understand goals for their event and incorporate our assets and promotion to best fit their needs and Key Performance Indicators (KPIs). The executive view of the calendar has annotated activations for community festival and events to include the cycle of before, during and after promotion.

BEFORE

Pre-promotion: content shared to promote and drive referrals to the event partner across email, website, digital, and organic and paid social

DURING

Real-time coverage: content shared "live" across social and boosted where applicable.

AFTER

Wrap-up content: content that shares highlights and photogenic moments about the event and showcases the destination to build awareness for the following year.

SOCIAL CHANNEL PRIORITIES FOR 2023-2024

These are the channels that best support Hilton Head Island's goal, and will be our focus for FY 2023-2024:

f FACEBOOK

Facebook has 2.91 billion monthly active users and is our most high-value social channel. At 235K page likes and growing, our page has the most significant number of followers. We will continue to build our Facebook community by expanding our content to include fresh, authentic photo and video assets that speak to the overall experience of our partners, sustainability/eco initiatives awareness, marquee events, co-op partnerships and campaigns.

O INSTAGRAM

Instagram is always evolving with new layouts, features, add-ons, business tools and more. As it continues to change we will adapt to what will position us at the forefront of users' feeds. With Reels continuing to be the leading form of content on the platform, we will work to build our asset bank to ensure we are relevant with current trends, and sharing authentic, engaging, and in-the-moment content.

Т ТІКТОК

TikTok has over a billion active users and is starting to become the leading platform for travel tips, hacks, and must-see/do experiences within a destination. In the fall of 2022, we launched the official Hilton Head Island TikTok channel and have made excellent strides in follower growth, views and likes. As TikTok continues to develop its features it provides us with unique story-telling opportunities to reach a new and broader audience, and repurpose our high-performing Reels content from Instagram to reach new audiences.

P PINTEREST

People come to Pinterest to be inspired, find travel guides, try new things, discover new recipes and plan a variety of different events. We have had proven success with many of our itinerary-style pins that highlighted various partners and drive users back to our website. We will continue to share the overall destination experience through new itineraries, unique wellness options and eco-friendly/sustainable experiences, by optimizing SEO to drive traffic to our pins and website.

in LINKEDIN

The VCB LinkedIn account is a natural home for all destination accolades. announcements, awards, and news. We will continue to share updates that are relevant to our LinkedIn audience and curate content that encourages meetings and group planners and other industry professionals to engage with us.

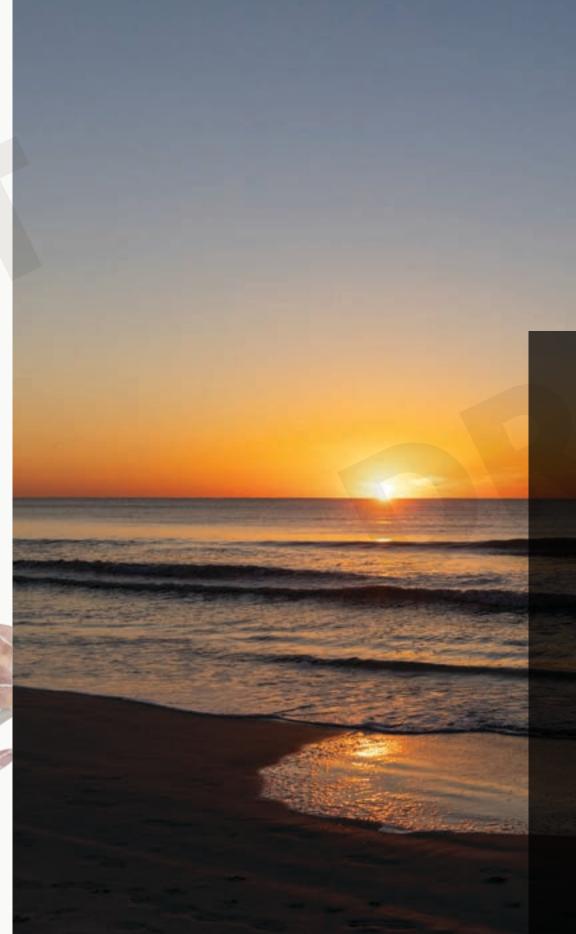
SPOTIFY

Spotify is a core platform for connecting with and inspiring customers in a unique way. Through playlists, collaborations, and paid ads, Hilton Head Island can continue to influence and reach new and existing audiences. With this in mind, along with taking SEO into consideration, we will continue to share songs that are trending, feel-good, coincide with local festival and events, and implement wellness-themed audio curation.

▶ YOUTUBE

YouTube is the second most engaging website globally and is also the second most popular search engine after Google. YouTube launched YouTube Shorts which expresses the importance of developing a bank of short-form video assets.

Hilton Head Island will continue to produce multipurpose content that highlights the destination's key values, parter businesses, events and destination attributes.



ISLAND TIME BLOG

Our Island Time Blog drives qualified, engaged traffic to HiltonHeadIsland.org. It's a landing place to bring people in from our social feeds, and a great jumping off point to show users what is happening on Hilton Head Island. Tied closely to search engine results, our goal with the Hilton Head Island blog is to create a useful tool for fun, inspiration, informational, travel tips, news, and more.

Over the past several years we have developed a strong bank of evergreen content for our audience, and now we can focus on deeper storytelling of our destination core values, attributes and community events for specific audiences.

- » Long-form, editorial pieces
- » Recipes and "insider tips" from partner restaurants, hotels, and attractions
- » Itineraries:
- » For Different Demographics
- » For Different Interests
- » For Different Vacation Lengths
- » Hilton Head Island Local features

962.9K

CIRCULATION

15.7M

SOCIAL MEDIA

FOLLOWERS



LEISURE MEDIA PARTNERSHIPS

It is no secret that the popularity of Hilton Head Island as a destination continues to increase. Hilton Head Island is well positioned with the product travelers are looking to experience. Recent accolades from Condé Nast Traveler, Travel + Leisure, and Southern Living are proof that Hilton Head Island is a global brand in regards to visitors wishing to experience the Lowcountry. Accolades earned by the destination bring our brand to the top which helps to enhance the overall awareness of Hilton Head Island as a "mustvisit" destination. We will continue to infuse the local community into our media efforts that allows the consumer to connect with the destination and inspire them to travel to Hilton Head Island to discover more.

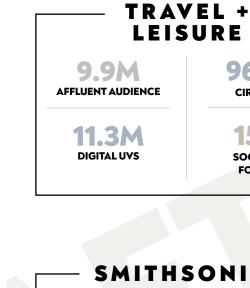
Travel + Leisure and Condé Nast Traveler, with their recognizable and highly coveted Reader's Choice Award accolade platforms, assist in the destination's efforts to cut through the ever increasing noise within the global travel sector. Securing a third party endorsement, at this level further solidifies the destination and establishes Hilton Head Island top of mind of a traveler's consideration set.

Today's travelers, specifically seeking upscale, shoulderseason travel, have a myriad of destination choices. By utilizing these platforms and endorsements to further amplify our voice, we are able to tell our brand story and leverage our overall marketing to help differentiate the destination from the competitive set and drive awareness and visitation to Hilton Head Island.

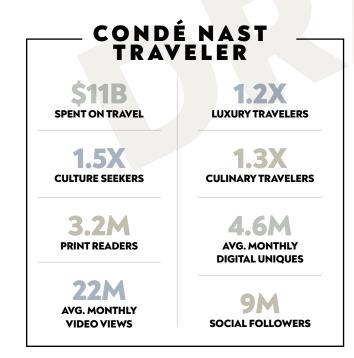
MEDIA PARTNERSHIPS

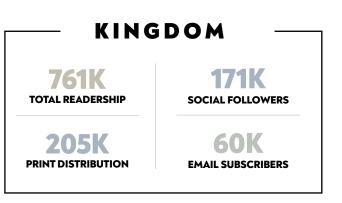
Below are examples of media partnerships we will continue to leverage. As additional opportunities arise throughout the year with cooperative partnerships these efforts could be expanded into other media brands.

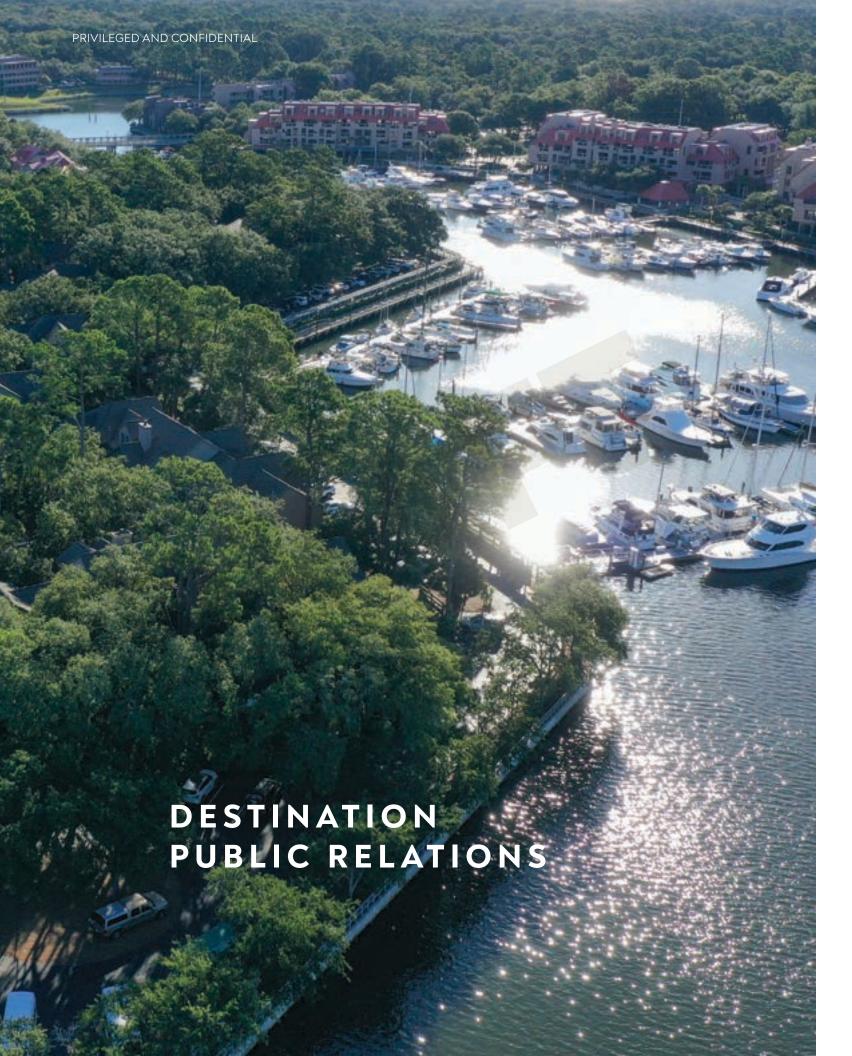












The Hilton Head Island Visitor and Convention Bureau will employ a forward-looking strategic and thoughtful public relations plan that is designed to make us stand out from the competition and convert first-time visitors to repeat guests.

Despite economic challenges and inflation, travel demand has been consistently thriving over the past year. Consumers are looking to escape the nuances of daily life for a vacation and are not deterred by surging prices. With burnout on the rise and trends like "quiet quitting" going viral, we are ready to utilize travel momentum paired with the need for a stress-free destination as a way to reintroduce Hilton Head Island as the utmost "Island Time" destination, where travelers won't need a vacation from afterward.

While leveraging core public relations tactics, we will continue to stay tapped in with our media contacts and remain agile throughout the next wave of media trends. With this approach, we will harness the momentum Hilton Head Island has received to ensure that we remain in consideration as a must-visit U.S. destination as travelers continue to look towards their "escapism" adventures and make a vacation that visitors never want to leave from.

TARGET AUDIENCES

While our targets are familiar, we are going to dive even deeper to find new and interesting ways to reach audiences that are most likely to travel and return to Hilton Head Island:

FAMILIES AND GROUPS: Family travel will remain top of mind as a top target audience for Hilton Head Island, especially as travel demand has surged significantly over the past couple years. 66% of families are looking at booking a beach vacation (Jonathan M. Tisch Center of Hospitality) this year.

SHORT-HAUL FLY AND DRIVE MARKETS: With easy access to the Lowcountry, we will continue to connect with those in our short-haul fly and drive markets and share details of the unparalleled outdoor experiences, culinary wonders and pristine beaches found only on the Island.

HIGHER AFFLUENT CONSUMERS: As folks find more flexibility in their schedules and plan to "go big" with travel, we will continue to look towards those with more disposable income who are seeking extended stays and convert them to repeat visitors or upcoming Island residents.

PRIORITY FOCUS AREAS

As we look to spotlight Hilton Head Island across top-tier publications and platforms, we have aligned with Weber Shandwick on priority angles across key verticals that we believe provide potential for growth opportunity, high consumer interest and strong mediability, to highlight Hilton Head Island's Southern charm, hospitality, local businesses and community festival and events:

CULTURE: We will honor the traditions and rich history of Gullah and Historic Mitchelville Freedom Park by leaning on angles and spokespeople that honor their storytelling past, present and future.

ECOLOGY: We will support the Island's history as the country's first eco-planned community and showcase the efforts to provide deeper insights on volunteering with locals on oyster reclamation and turtle conservation.

CULINARY: We will lean on authentic Gullah cuisine, local seafood, interesting chef stories, signature sips and bites as well as other growing culinary themes to showcase Hilton Head Island's evolving food culture.

WELLNESS: As consumers continue to prioritize self-care, we will highlight the variety of wellness experiences available to travelers, as well as offer access to on-Island experts to speak to the evolving trends in this space.

OUTDOOR: We will position Hilton Head Island as an outdoor marvel by leveraging its miles of leisure and bike pathways and pristine wide beaches, outdoor activities and temperate weather.

SHOULDER SEASON/MARQUEE EVENTS: We will encourage visitation to the destination during the shoulder season by highlighting on-Island experiences and marquee events.

2023-2024 PR TACTICS

We'll employ a number of public relations tactics to seamlessly spread destination news far and wide throughout the year. Public relations efforts will include:

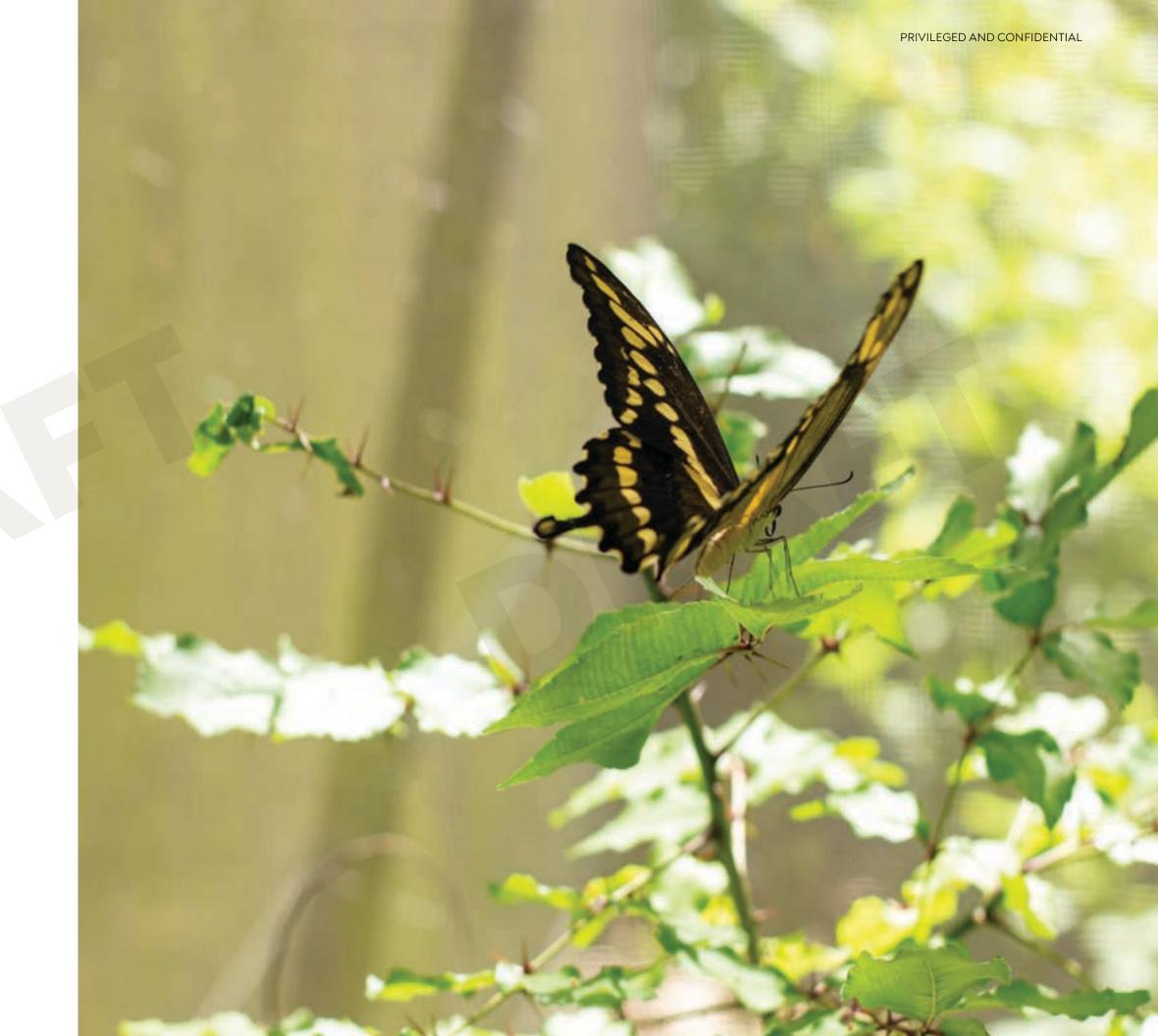
visiting Journalist Program: To help craft narratives that will resonate the most with potential travelers, we will customize itineraries for key journalists and influencers that highlight priority verticals while still allowing them to experience true southern charm on a trade basis.

platforms and keeping tabs on the latest trending mediums - we will remain strategic when connecting with influencers to find the most impactful ways to engage dedicated audiences via paid influencer partnership opportunities with a focus on how to experience the Lowcountry like a local.

ALWAYS-ON MEDIA RELATIONS: Our news bureau engine will continue to tout the diverse offerings of Hilton Head Island's Lowcountry through newsworthy angles, while we will look to insert the destination into emerging trends and inspire travel to the destination.

STRATEGIC PARTNERSHIPS AND SPECIAL

PROJECTS: We will encourage travel to Hilton Head Island by partnering with like-minded brands our target audiences are following and engaging with. Through smart brand alignment, we will keep Hilton Head Island in the cultural conversation with multiple touchpoints and scalable executions.



MEETINGS & GROUP SALES

The meetings and group industry is on a solid path to recovery.

U.S. TRAVEL ASSOCIATION FORECAST

U.S. Travel Association's fall 2022 forecast, showed continued improvement in domestic business travel, with a slight slowdown in 2023 as the economy enters a mild recession. A full recovery in terms of volume is still forecasted for 2024, but inflation-adjusted spending recovery remains beyond the range of the forecast.

Domestic Business Travel has struggled in its recovery, but a boost in pent-up demand was being realized in the second half of 2022. Though rising corporate travel sentiment is positive, the oncoming recession and restrictive Federal policy could further derail the recovery for 2023. There has thus been a slight downgrade in both volume and real spending, mostly for 2023, but there is no change to the recovery timeline. While domestic business travel volume is expected to fully recover in 2024, real spending by this sector is not projected to recover within the range of the forecast (so not before 2027).

The latest Business Travel Tracker (a product of the U.S. Travel Association, J.D. Power and Tourism Economics) finds that American companies are increasingly pairing back pandemic-era restrictions on business travel amid developing storm clouds in the form of persistently high inflation and a looming recession. Many companies slashed their business travel budgets during the pandemic, but less than half of companies (42%) still have policies in place restricting business travel—down from 50% in the prior report. Businesses have shown a willingness to get back on the road, with 78% of business travelers expecting to take at least one trip to attend

conferences, conventions or tradeshows and 75% expecting to visit customers, suppliers or other stakeholders in the next six months.

Source: U.S. Travel Association Forecast Fall 2022

AMERICAN EXPRESS GLOBAL MEETINGS & EVENTS FORECAST

For 2023, we are seeing a trend towards sustainability in the meetings and groups segment. The American Express Global Meetings and Events Forecast backs up this insight with their annual survey of meeting and event professionals across the world. The results show that 71% of respondents' organizations consider sustainability when planning a meeting or event; with the majority of those respondents having a defined sustainable meeting strategy within their organization. Minimizing paper usage, choosing green suppliers, and applying energy-saving and waste reduction practices are the top three ways for organizations to meet their sustainability targets.

Source: American Express Global Meetings and Events Forecast

OUR APPROACH

Hilton Head Island is well positioned to provide the ideal environment as a destination that leads with sustainability and ecotourism as one of its key core values. Following the vision of Charles Fraser, the forward-thinking developer that came to the island establishing the highest land planning standards: to keep this lush sea island clean and vibrant for the thousands of residents and visitors who enjoy it every year.

We do this as a destination with our efforts to protect and preserve the environment and beauty of Hilton Head Island. We work closely with partners like Sea Turtle Patrol Hilton Head Island and Outside Foundation with their oyster recycling programs to understand how we can best support and promote their efforts. In our Community Cornerstone Plan, we have initiatives around building out an eco campaign that educates our residents and visitors on the importance of our ecosystem and instill a sense of pride of place. We are building out Corporate Responsibility programs that groups will be able to engage in while in the destination and give back to our island.

Several of our businesses make it a priority to source local fresh seafood and ingredients including our local oysters which are then recycled to ensure the Lowcountry continues to maintain a healthy population of briny shellfish as well as their use in reef reef rebuilding efforts to help protect our shorelines from erosion. Our hotel partners are also very ecofriendly when it comes to recycling and looking at waste reduction. Together, with our partners we will look to promote their efforts with a sustainability first approach mindset.

In addition, we will leverage updated product throughout the island in our messaging.

PROGRAM PARTNERSHIPS

By leveraging our partnerships with third party organizations specific to the meetings and group industry, we are able to build awareness and increase group business demand for the destination. We are able to capitalize on existing platforms to further tell our story of why Hilton Head Island is the perfect location for meetings and events, reinforce relationships and reach new buyers for future events and gatherings.

Consistency with the following programs support the overall meetings and group strategy:

Cvent, Inc. Annual Marketing Campaign

Cvent, Inc. is the leading event management platform and offers software solutions to event planners for destination and venue selection. Cvent provides Visitor & Convention Bureaus (VCBs) with an integrated platform, enabling destinations to increase business demand through targeted advertising and improve conversion with planners throughout the Cvent platform.

Strategy: Cvent recognizes the value that VCBs add to the site selection and sourcing process. It is their goal to help educate their planners about the incredible services and resources that VCBs provide. Cvent strives to promote VCBs as one of the best first points of contact to help in finding the ideal venue for any type of event.

Execution: Our partnership will include a year-round marketing campaign promoting awareness of Hilton Head Island on the Cvent platform which has over 150,000 active planner users. Highlights of our 4 Diamond level package include:

- » Annual destination guide fee to be listed within the platform
- » Upgraded, more prominent advertising throughout the Cvent network
- » Featured article about the destination in the Cvent newsletter
- » Competitive marketing ads to planners sourcing similar destinations
- » Retargeted Google display ads to those searching for competitive markets and/or who have shown interest in our destination

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HelmsBriscoe (HB) Annual Marketing Campaign

As one of the global leaders in the meeting procurement space, HelmsBriscoe leverages the experiences of their associates in more than 55 countries to deliver world-class solutions. The sheer volume of room nights booked and the collective insights shared between their seasoned associates is beyond comparison.

Strategy: Partner with HelmsBriscoe to increase awareness and bookings for the destination within the HelmsBriscoe worldwide network.

Execution: The destination partnership program will allow us to have a consistent presence on the HelmsBriscoe platform to promote awareness and bookings for Hilton Head Island. Highlights of this program include:

- » Custom profile on HelmsBriscoe intranet and website
- » Ability to list special needs periods and value offerings within HelmsBriscoe throughout the year
- » Feature on the destination in the HelmsBriscoe partner buzz enewsletter
- » Access to HelmsBriscoe's destination production analytics

NorthStar Meetings Group

NorthstarMeetingsGroup.com is a premier online platform for business and sports event organizers, planners and incentive program professionals across all sectors – corporate, association, third-party organizations/agencies, SMERF (social, military, education, religious and fraternal meetings) – providing critical news analysis and research, practical strategies, creative solutions and sourcing services.

Strategy: Leverage Northstar Meetings through their digital platform and lead prospecting efforts and resources to build awareness and generate group bookings to the destination.

Execution: Integrate within the Northstar Meetings

platform primarily through digital and lead generation programs. Highlights of the partnership include:

- » Five day Instagram takeover on the MeetingsNews channels, each post will feature the destination, a hotel and/or meeting venue space
- » Lead prospecting and generation program facilitated with business and sports-event planners and incentive professionals
- Targeted email campaign to the Northstar meeting planners database

Connect - BizBash

BizBash is an affiliate of Connect Meetings. It serves as a resource for event and meeting professionals for venue and supplier discovery. BizBash hosts in-person events, a monthly podcast, and deploys a weekly newsletter, and bi-annual magazine.

Strategy: Develop a partnership that can grow and evolve based on performance with Connect - BizBash to reach their audience segment.

Execution: Media buy integration that includes guaranteed performance. Highlights of the program include:

- » Full page print ad in Connect publication with distribution to 50K targeted meeting planners
- » 400,000 guaranteed on-site impressions to qualified meeting planners
- » 500,000 guaranteed off-site impressions to qualified meeting planners
- » Social posts on Connect's Instagram, Facebook, LinkedIn, and Twitter platforms
- » BizBash Buzz Destination Spotlight

SOLICITATION AND LEADS

We have a goal of 50 solicitations per month via direct solicitation, sales appointments and/or leads to properties. In 2022, our direct solicitations (phone, email, social media) were 535 and we attended/participated in 352 sales appointments (sales calls, tradeshows, virtual).

In 2022, we were up 43% YOY in the number of leads sent to partners. Our goal for 2023 will be 125 of qualified leads sent to properties via direct RFPs and RFPs submitted through MeetOnHiltonHead. com. Because we see the highest return on investment within these segments, we will focus our efforts on Corporate, Association, 3rd Party Intermediaries and Incentive groups.

RFP LEADS RECEIVED

YEAR	LEADS RECEIVED
2019	69
2020	24
2022	101

INDUSTRY PARTNERSHIPS AND TRADESHOWS

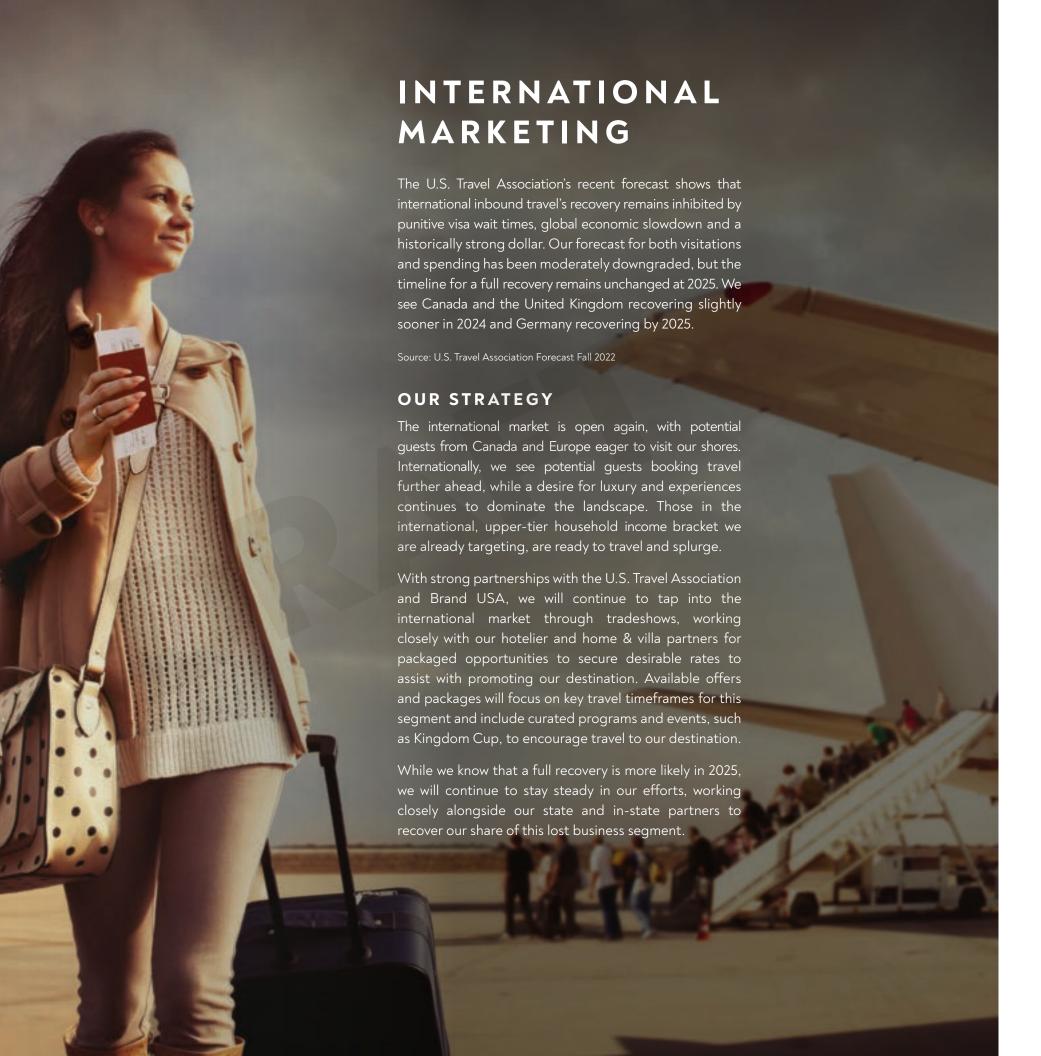
In order to achieve our goal of increasing qualified leads, we will continue to foster our industry partnerships with conference or meeting attendance/activations and promotion on their platforms.

Our presence at industry tradeshows continues to reinforce our willingness to partner with meeting planners and increase visibility to decision-makers. This opportunity represents a large portion of our efforts and how we can grow our qualified leads throughout the year; ultimately turning into booked business for the destination partners, heads in beds in key timeframes and accommodations taxes to continue to fill the pipeline year after year.

TRADESHOWS

NAME	DATE	LOCATION
Northstar Small & Boutique Meetings	July 9-11, 2023	Franklin, TN
Northstar Destination Southeast	August 13-15, 2023	Cape Coral, FL
Connect Marketplace	August 22-24, 2023	Minneapolis, MN
M&I Americas	October 1-4, 2023	El Paso, TX
Hosted Client Event	October 23, 2023	Charlotte, NC
HPN Partner Fair	October 25-27, 2023	Denver, CO
FICP Annual Conference	November 12-15, 2023	Marco Island, FL
Connect DC Connect Faith	November 26-29, 2023	Washington, DC
Accent East	November 28-30, 2023	Beaufort, SC
IPEC - Independent Planner Ed Conference	January 2024	TBD
SCSAE Tradeshow	January 2024	Columbia, SC
MPI Spring Summit	March 2024	Atlanta, GA
Luxury Meeting Summit	May 2024	Raleigh, NC; Charlotte, NC; Atlanta, GA
U.S. Travel Association IPW	May 2024	TBD
SCSAE Annual Conference	June 2024	TBD
Smart Meetings	June 2024	TBD

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COLLATERAL AND FULFILLMENT

The Hilton Head Island Visitor & Convention Bureau develops and produces the Official Hilton Head Island Vacation Planner. This print and digital publication is our primary fulfillment piece and a comprehensive quide to local opportunities for what to see and do, where to stay, dining, activities and more on Hilton Head Island and in our region.

As travel trends have shifted and domestic travel to new destinations has increased, the Vacation Planner is a critical first touchpoint with potential visitors. Telling a story through stunning photography and compelling content is an imperative component to the travel journey process that ultimately leads to a conversion with our partners. This "coffee table" piece allows our visitors to visualize their vacation and discover the destination, the reason for our many accolades, and imagine themselves here vacationing on America's Favorite Island®. In addition to working with a publisher, our in house marketing staff provides the business directory, event calendar, local photography, editorial content management, editorial review and proofreading for this asset.

PROMOTIONS AND BROCHURE DISTRIBUTION

Included in our budget is a dedicated campaign for the promotion of the Vacation Planner for visitors to request a quide as well as for fulfillment and distribution costs.

The books are distributed through:

- » Online requests
- » Phone inquiries
- » Savannah/Hilton Head International Airport
- » Hilton Head Island Airport
- » South Carolina Welcome Centers
- » AAA offices nationwide
- » Hotel partners
- » Tradeshows » Events
- » Media

In partnership with the Lowcountry Golf Club Owners Association (LGCOA), we also include their Official Golf Vacation Planner with our planner when requested.





NURTURING NATURE

We continued to educate and inform residents and guests about the importance of protecting our delicate ecosystem, and the role each individual can play in that.

ECOSYSTEM PROTECTION CAMPAIGN

Educating and informing residents and guests about how they can play a role in protecting our delicate ecosystem has always been a part of our destination efforts.

In 2023-2024 we will grow this approach, positioning the participation in protecting the destination's delicate ecosystem as a reason to support Hilton Head Island in and of itself.

Inspired by destinations who've taken this step, such as the Faroe Islands and Destination British Columbia, marketing efforts this year will include an integrated campaign that includes an added incentive for visitors: the opportunity to actively participate in the destination's research and protection efforts.

We will also expand beyond our Sea Turtle Season, to grow our educational and experiential offering around all our wildlife and conservation efforts such as, but not limited to, sea turtles, dolphins, birds, and beaches themselves.

Businesses will have the opportunity to be actively involved in the efforts as well as ongoing ways to educate visitors. This can include the expansion of current one-sheet information provided to guests, adoption program, and beach clean ups for example.





ARTS AND CULTURE

In partnership with the Town of Hilton Head Island's Culture HHI, we are dedicated to promoting the Island's unique arts and culture in a way that can inspire a traveler to visit. With some of the finest art galleries, live music venues, and dance and theater productions happening year-round, Hilton Head Island's arts and culture scene is second to none.

platforms including promotion through the destination assets, website, social and display as well as a media buy opportunity with Smithsonian. This opportunity will continue to build awareness around the robust arts and culture experiences the destination has to offer.

EXECUTION:

- Dedicated digital campaign driving traffic and referrals to the arts and culture section of HiltonHeadIsland.
 org, promoting our partners within this segment and utilizing the video created in partnership with Culture HHI.
- Development of a dedicated campaign for driving awareness and engagement to the newly designed Gullah website and a continuation of capturing content to populate on the website.
- Media partnership with Smithsonian for a spring buy; this will be a continuation of our fall 2022 efforts and great synergy with Coastal Discovery Museum being a Smithsonian affiliate as well as with the Town and all the initiatives with Culture HHI and the Historic Mitchelville Freedom Park. Opportunities could include print and digital with custom native content.

FESTIVALS & EVENTS PROMOTION

Hilton Head Island is an amazing destination 365 days a year. There is an experience to be had during every season, from classic cars and vintage aircraft, to music performances and oyster roasts.

We will partner with local community marquee festival and event partners, including but not limited to the following:

- Gullah Celebration
- Seafood Festival
- Wine & Food Festival
- International Piano Competition
- · RBC Heritage Presented by Boeing
- Juneteenth Celebration
- Pedal Hilton Head Island
- Gullah Food Festival
- Crescendo
- · Concours d'Elegance & Motoring Festival
- Island Rec Center Marquee Events
- Coastal Discovery Museum
- Gullah Museum
- Arts Center of Coastal Carolina

STRATEGY: We will highlight partner events that drive overnight visitation. We will focus efforts on our drive and short-haul fly markets. Our goal will be to leverage the strength of our brand and support our partners through a holistic, multi-platform approach that reaches their desired demographic with key message points.

EXECUTION: Includes individualized strategic marketing campaigns created for each partner. Examples of campaign deliverables include:

Website

- Dedicated landing page(s) where appropriate
- Review/refresh imagery and video content, including capturing new if available

Search Engine Marketing (SEM)

- SEM, dedicated campaign to promote and drive qualified traffic
- Keyword initiative to strengthen terms associated with our partners

Display

- Creation of assets, co-branded
- Focus on affinity audiences, in-market audiences and demographic targeting

Paid Social Media

- Target geographic, demographic, interest, behavioral and remarketing
- · Festival and event specific imagery and video
- Sweepstakes and contests enticing travel during this timeframe (if applicable)

Targeted Media Buys

 Print and/or digital media buys with publications that speak to the breadth of consumers we attract, e.g. Southern Living, Condé Nast Traveler, Garden & Gun, etc.



HISTORICAL HERITAGE TOURISM

Historical heritage tourism, defined by the National Trust for Historic Preservation, is "traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past and present". Going back as far as 8000 BC, Hilton Head Island has played a part in charting significant milestones throughout this country and the world's history.

STRATEGY: As we look to further establish the destination as a place for heritage travel we will work alongside the community to gather assets, collecting the rich history it holds and documenting it through various touchpoints for visitors to explore.

We will also engage our partners within the community and tour operators to document and preserve the rich history of the island through storytelling for generations to come.

EXECUTION: Currently Hilton Head Island hosts over 30 sites with visible locations or remnants. We will start with these points of interest and work closely with the organization and/ or owner/manager of these sites to ensure historical accuracy. Below are the tactics for our plan.

- Collaborate with partners to capture content, video and imagery for promotion on the destination's assets as well as for our partners to use for their assets
- Build robust itineraries and offerings for visitors to explore and connect deeper to the island through its rich history
- Develop a dedicated digital campaign to promote new content captured

WELLNESS TOURISM

Wellness tourism is defined as travel associated with the pursuit of maintaining or enhancing one's personal well-being. The travel industry has seen several iterations of wellness travel over the years including retreats and bleisure (business and leisure travel) across all segments of travel. As we continue to recover post pandemic, travelers are once again seeking wellness but this time for a deeper connection with others and the places they chose to visit.

The Global Wellness Economy Report states that as an industry, the global wellness economy is estimated at \$4.4 trillion as of 2020, this is accounting for the disruption of COVID-19. As a segment wellness tourism travel contributes nearly \$438 billion to this industry. Recent trend reports show a forecast for wellness tourism at an annual growth rate of 21% from 2020 - 2025. And the recent 2021 AMEX Trendex Report found that 76% of survey participants said, "they want to spend more on travel to improve their well-being," and 55%, "would be willing to pay extra for wellness activities on future vacations."

As you look deeper into the definition you will find that today's traveler is seeking more. They are seeking a new way, a reset and a place to do it in. Hilton Head Island's foundation speaks to this reset. From our serene beaches to our over sixty-miles of leisure pathways, rich foliage and abundant wildlife, our destination offers visitors the opportunity to relax, reconnect and rejuvenate. When you are on Hilton Head Island, your senses are immersed and you feel a sense of a place.

STRATEGY: We will build upon our strong foundation as a wellness destination and work closely with our community partners in the following areas.

- Community Engagement: Visitors' focus
 has shifted to engaging in authentic, ethical
 interactions with communities they are
 exploring which includes learning about and
 participating in local activities and events.
- Digital Detox: With a renewed appreciation for the experience of being mindful and fully soaking in a destination, people are consciously putting some distance between themselves and their digital devices while on vacation.
- Nature Immersion: Travelers are purposefully incorporating open-air activities into their trips—whether that's bird watching, forest bathing, stargazing, camping or glamping, or water sports, fishing, biking, hiking or nature tours.
- Sustainable Travel: This trend ties into the travelers' growing desire to engage more closely with the community, heritage, customs and cuisine in destinations they are visiting.
- Work-free Escapes: People are increasingly looking to "switch off" from work mode completely in order to fully immerse themselves in their vacation, and enjoy some worry-free rest and relaxation.

EXECUTION: HiltonHeadIsland.org and our digital assets offer the first touchpoint for travelers to engage with our destination. We will utilize these platforms for promotion including:

- Refresh and capture new content to utilize across our platforms
- Develop a campaign focused on the key areas mentioned in the strategy. Details would include promotion across website, digital and social
- Build out wellness itineraries and programs that will drive overnight visitation, e.g. wellness retreat



SPORTS MARKETING

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To explore cultural attractions, historical sites and the local arts scene.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Plan		Visit				Plan			Visit		Plan

ARTS, HISTORY & CULTURE TRAVEL HABITS



PREFERRED ACTIVITIES **& ATTRACTIONS**

Historical Attractions Art Galleries Local Culture Culinary Experiences Festivals & Events

Theater

MARKETING CHANNELS & FORMATS

Facebook Videos Instagram TripAdvisor Online Video Forums & Blogs

Pinterest

Earned Media (Print/Digital)

"EXPERIENCES ARE GREATER THAN THINGS." THEIR PATH TO PURCHASE

cultural experiences like?

When should we visit to be able to best take advantage of what HHI has to offer?

What's the best way to get there? Does it make more sense to drive or fly?

What should I pack?

Is a weekend enough, or should we stay for longer?

This sculpture is beautiful. I need to share it on Instagram.

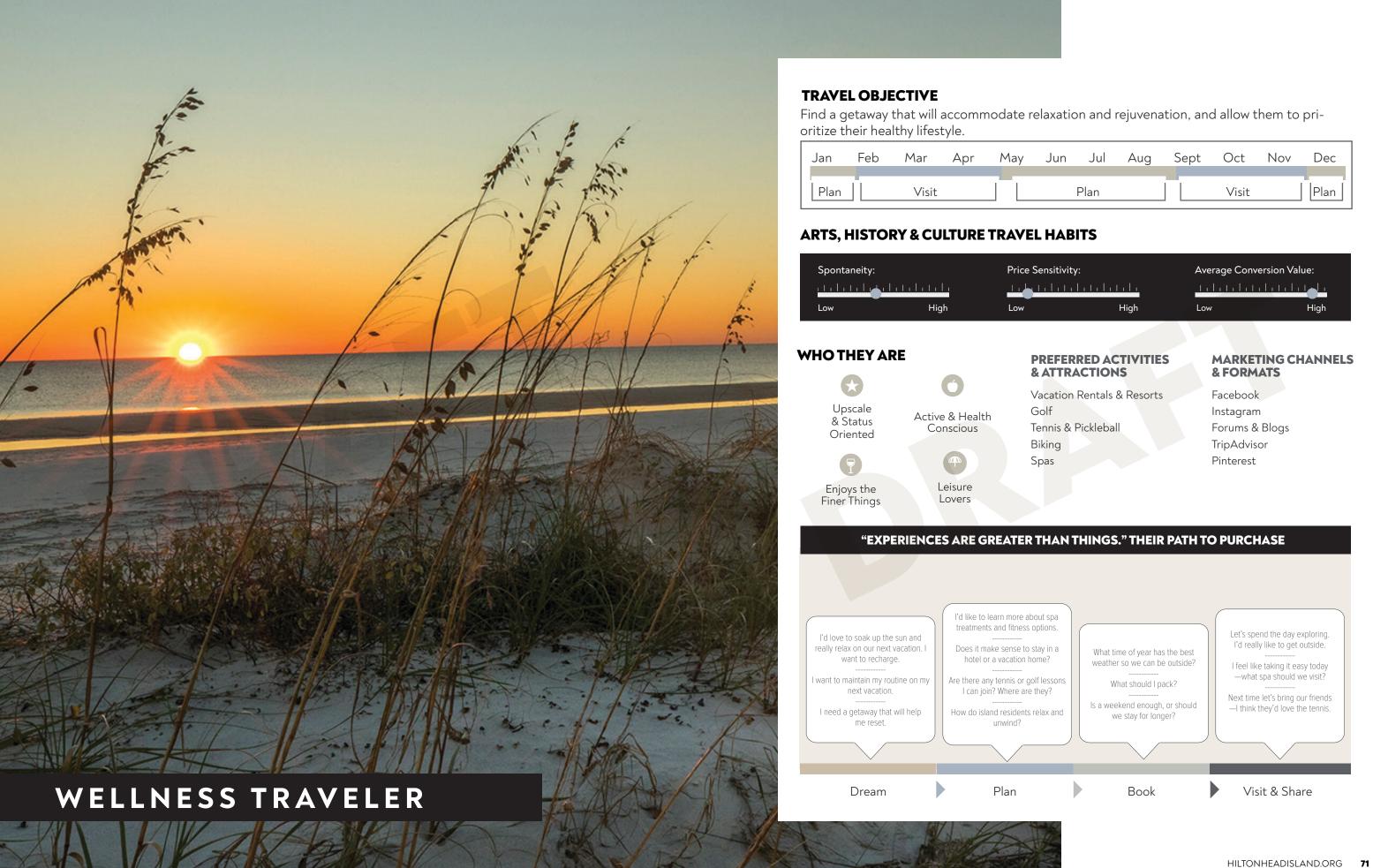
Let's pop into this cute gallery and pick up something to display at home.

Where can I get tickets for tonight's show?

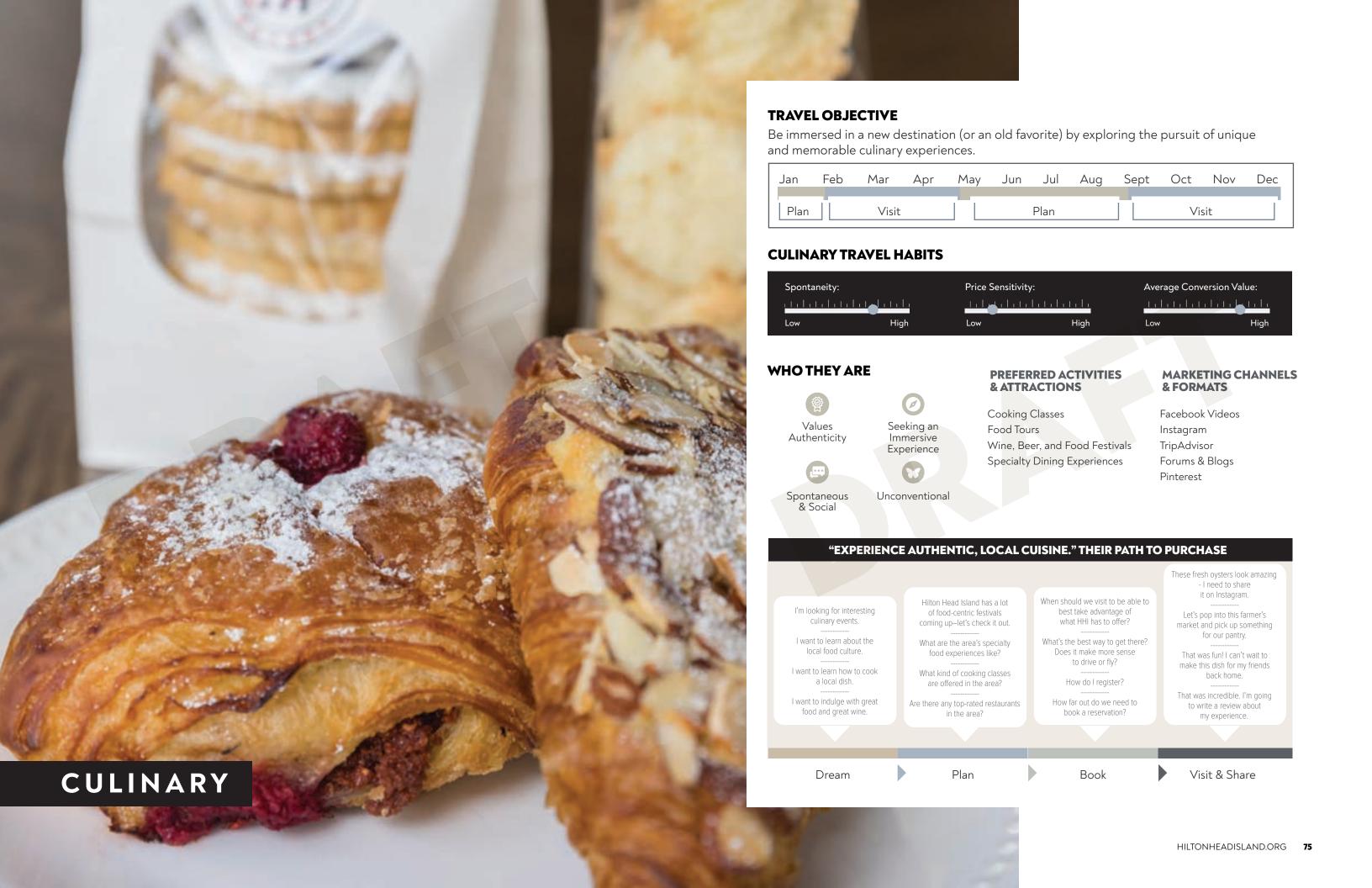
I want to immerse myself in the local culture...what are some offthe-beaten path activities? Where are locals spending time?

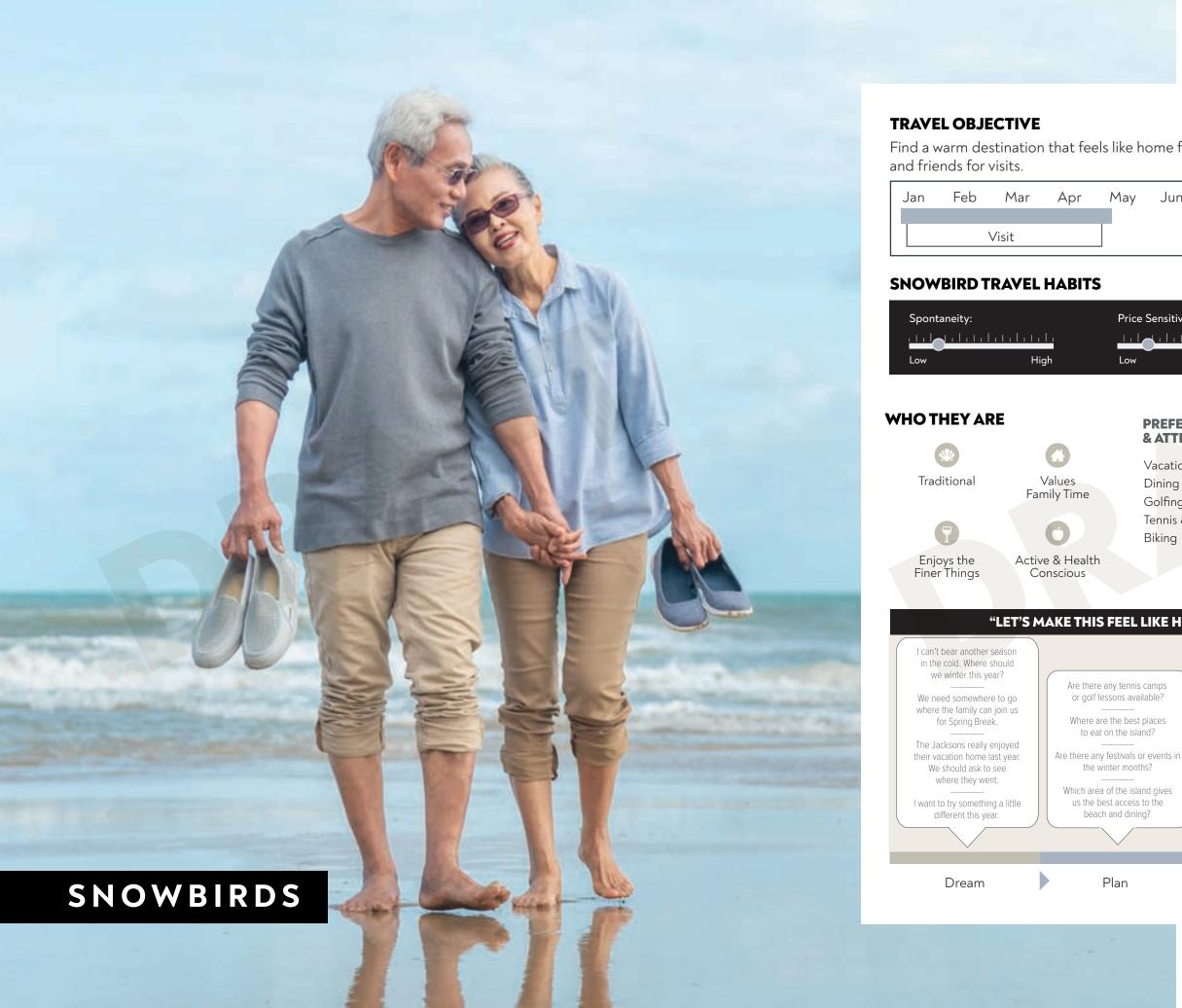
Book

Visit & Share



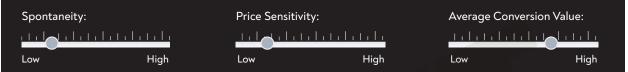






Find a warm destination that feels like home for the winter, where they can welcome family

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	\	√isit							Pl	an	



PREFERRED ACTIVITIES & ATTRACTIONS

Vacation Rentals & Resorts

Dining Golfing

Tennis & Pickleball

Biking

MARKETING CHANNELS & FORMATS

Facebook

Print TripAdvisor

Radio TV

Online Video

"LET'S MAKE THIS FEEL LIKE HOME." THEIR PATH TO PURCHASE

or golf lessons available?

to eat on the island?

the winter months?

us the best access to the beach and dining?

Is the best deal to book directly or with a travel agent?

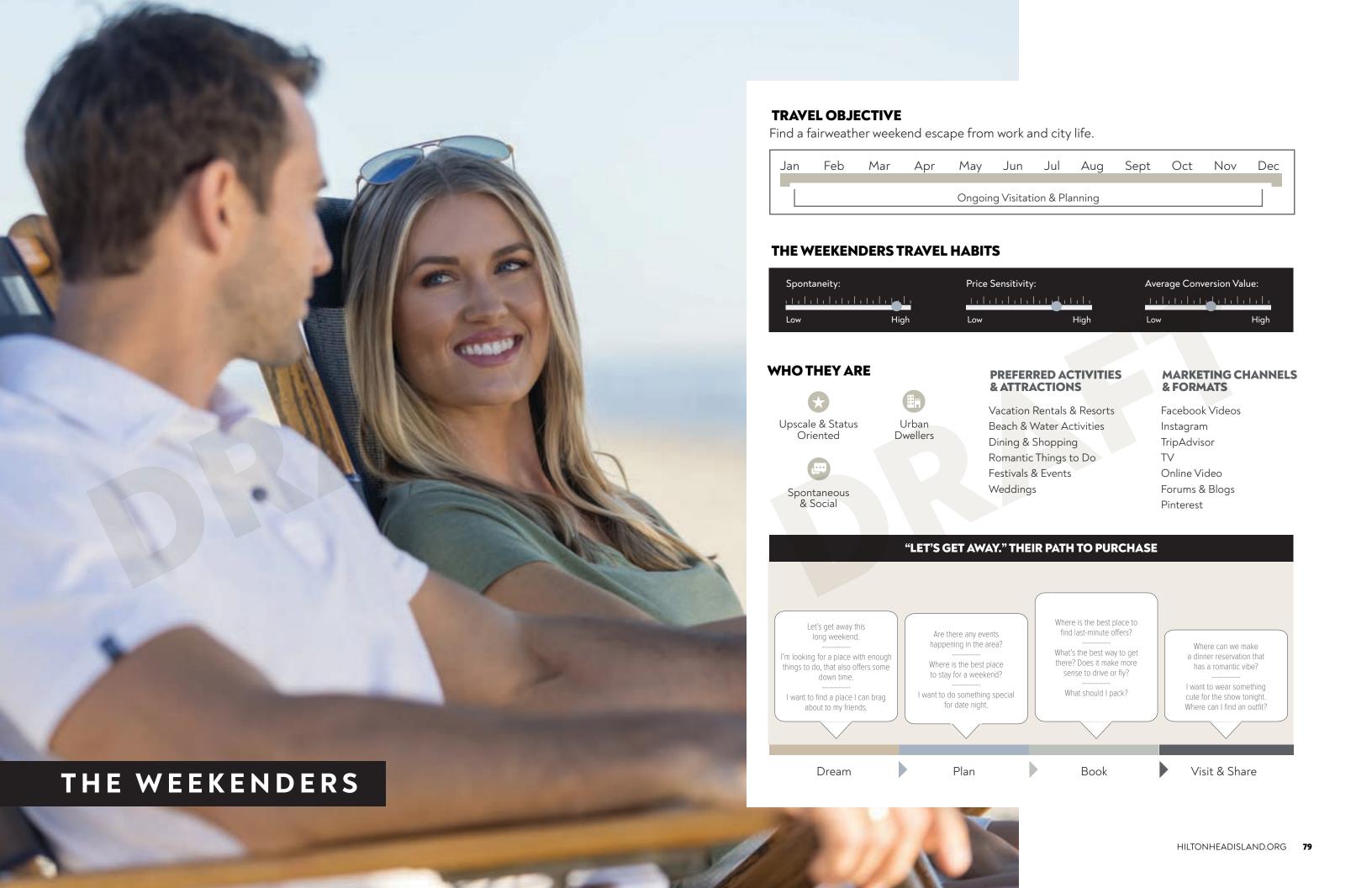
How early should we book our vacation rental for the best view? This rental truly is a home away from home. Look at all this space!

> Where should we eat tonight?

Next time, let's bring the grandkids - I think they'd love the beach.

Book

Visit & Share





TRAVEL OBJECTIVE

Find a vacation spot that will inspire and that offers something different than where we're from. Escape the everyday, relax and recharge in a destination that's fresh, and different from home.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	Visit			Plan	J		Visit			Plan	

INTERNATIONAL TRAVEL HABITS

Spontaneity:		Price Sensitiv	ity:	Average Con	version Value:
111116111	. L. L. L. L. L. L.	1,1,1,1	<u>ditilitili</u>	1,1,1,1,1	111111111
Low	High	Low	High	Low	High

WHO THEY ARE



Upscale & Status Oriented



Values Family Time



Active & Health Conscious

PREFERRED ACTIVITIES & ATTRACTIONS

Homes & Villas Beach & Water Activities Biking & Hiking Food & Drink Festivals & Events

MARKETING CHANNELS & FORMATS

Facebook Videos Instagram TripAdvisor TV Online Video Forums & Blogs Pinterest

"IT'S TIME TO GET AWAY FROM IT ALL." THEIR PATH TO PURCHASE

I'd love to soak up the sun and really relax on our next vacation. I want to recharge.

I love the beach, but I don't like huge crowds-I'd like to go somewhere a little more laid-back.

We have more time to take a longer trip. Let's look at booking a full week - or more!

I really need a change of scenery.

Dream

What are the beaches like on Hilton Head Island?

I'd like to learn more about spa treatments and fitness options.

Does it make more sense to stay in a hotel or villa?

Is it easy to get to

Hilton Head Island?

Plan

What are the must-see attractions on HHI? I want to make the most of my time there.

When should I book my flight to get the best fares?

> What's the best time of year to travel? How's the weather in the summer?

What should I pack for a spring getaway?

Where are the best places

This beach is stunning! I can't wait to show my friends.

Let's spend the day exploring. I'd really like to get outside.

feel like taking it easy today. What should we do?

I don't know many people who have traveled to Hilton Head Island, so I'm going to post about my experience. I think my friends would love it.

Book Visit & Share

2022 COMMUNITY SENTIMENT SURVEY EXECUTIVE SUMMARY:

MMGY TRAVEL INTELLIGENCE



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Key Insight #3: Pride in Residency	25
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Survey Methodology

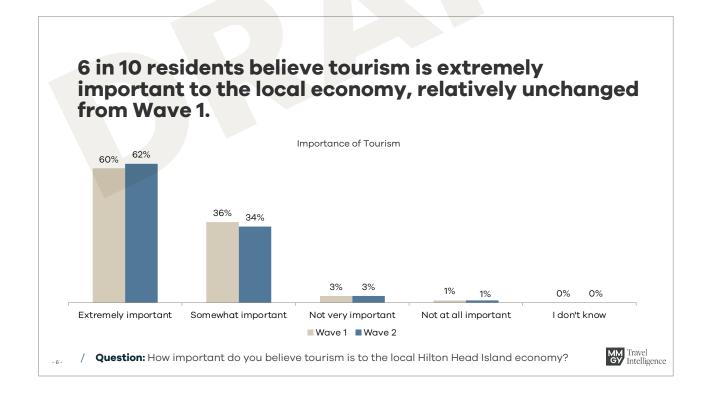
- MMGY Travel Intelligence conducted an online survey of 3,292 Hilton Head Island residents.
- Residents were invited to complete the online survey through the Chamber website, social media channels, and email outreach.
- The survey was fielded August 22, 2022 September 4, 2022. Data were tabulated and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



Key INSIGHT #1 Compared to Wave 1, residents feel slightly more positively about tourism. Fewer indicate it impacts them negatively, fewer feel that each season is too crowded, and more support efforts by the Chamber to fund public art, events, and tourism marketing.



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?



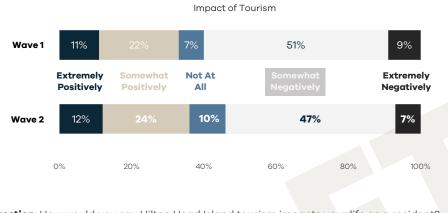
Those who work are more likely to find tourism to be extremely important to the Hilton Head Island economy than those who are retired.

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?



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?



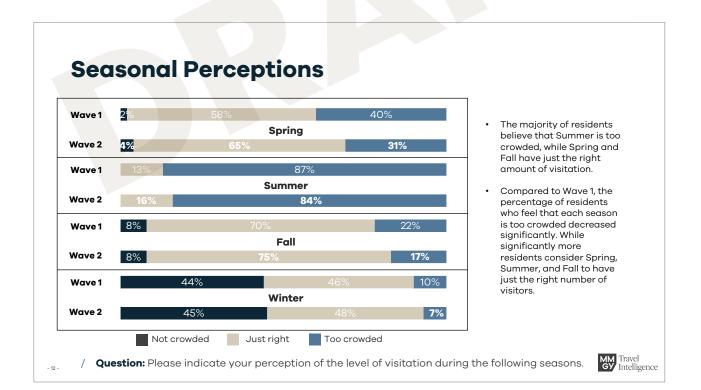
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Retirees are more likely to feel tourism impacts them negatively than those who currently work.

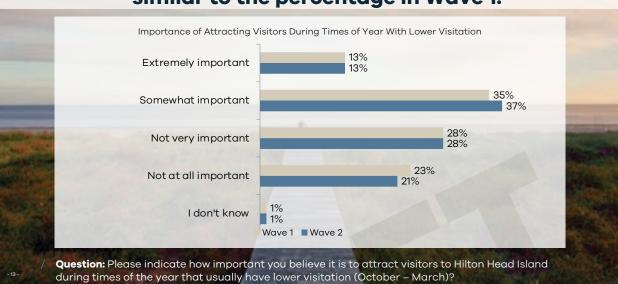
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely positively	18%	21%	7%
Somewhat positively	28%	25%	22%
Not at all	7%	13%	11%
Somewhat negatively	39%	36%	53%
Extremely negatively	8%	5%	7%

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

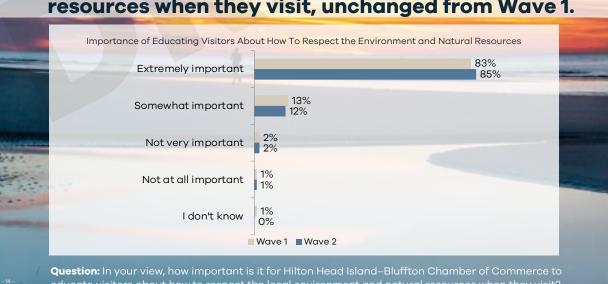




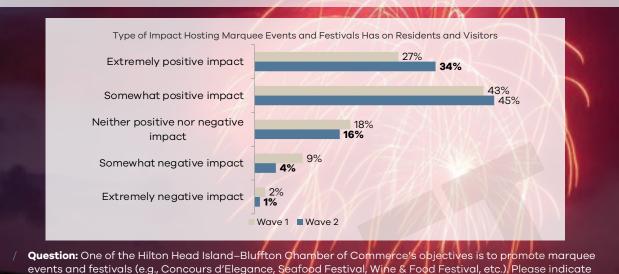
Half of residents believe that it is important to attract visitors during times of the year with lower visitation, similar to the percentage in Wave 1.



Nearly all residents believe it is important to educate visitors about how to respect the environment and natural resources when they visit, unchanged from Wave 1.



8 in 10 residents believe events have a positive impact on residents and visitors, a significant increase from Wave 1.



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.

the type of impact you believe these activities have on the quality of life for local residents and visitors.

	Wave 1	Wave 2
I supp <mark>ort</mark> 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:





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...

- Creates jobs for area residents Provides amenities and attractions that residents can also enjoy Provides restaurants that residents can also enjoy

Negative: Tourism on Hilton Head Island...

- Creates traffic congestion problems for residents
 Causes local restaurant & entertainment prices to rise
 Negatively impacts our natural resources
 Brings too many people to Hilton Head Island



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% A
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)	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...



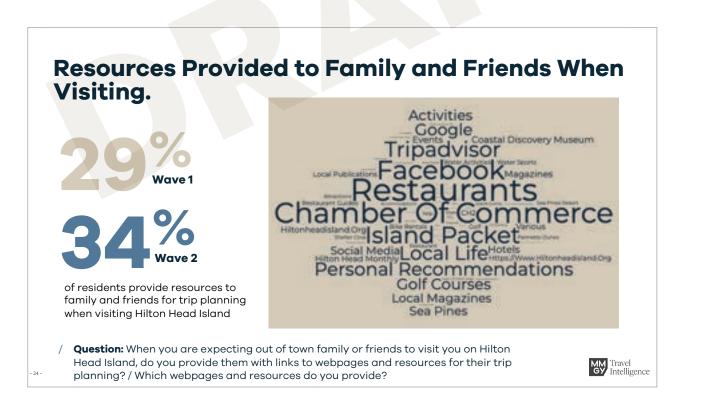
Tourism on Hilton Head Island...

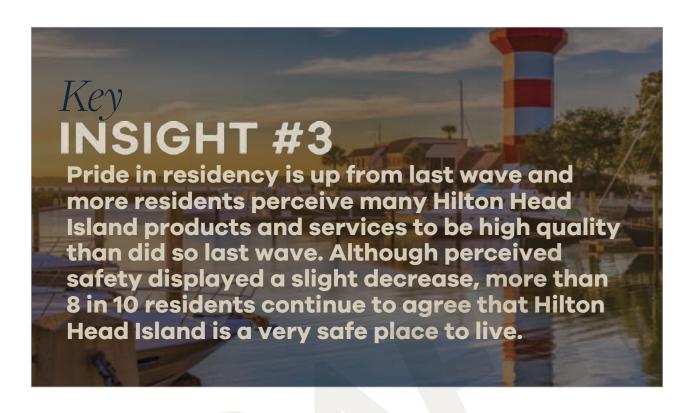
All Statements (% Agree)	Wave 1	Wave 2
Creates traffic congestion problems for residents	86%	82%
Generates tax revenues for state, county and local governments	76%	80%
Creates jobs for area residents	71%	73%
Provides restaurants that local residents can also enjoy	63%	68%
Supports local business creation	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%
ls 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%

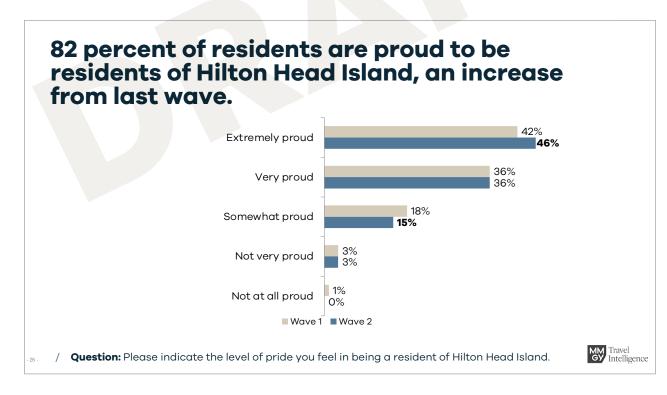
Question: Please indicate your level of agreement with the following statements: Tourism on Hilton Head Island...



Hilton Head Island-Bluffton Chamber of Commerce Funding Accommodations tax dollars collected from hotel and home & villa guests Hospitality tax Local sales tax Local sales tax Private funding State funding State funding Other Other Accommodations tax dollars collected from hotel and home & villa guests Hospitality tax Local sales tax Private funding State funding Other Wave 1 Wave 2 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.







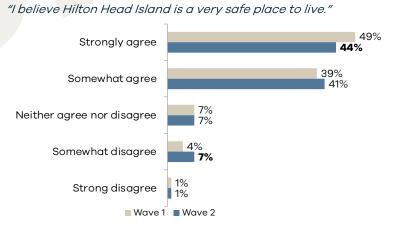
Those who work are more likely to be extremely proud in their residency than retirees.

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.



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



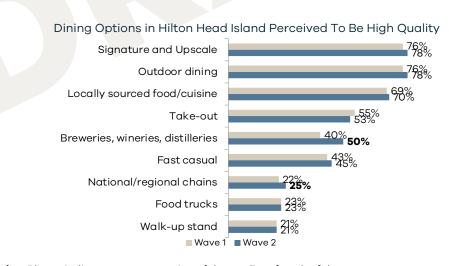
Perceived Quality of Hilton Head Island Experiences

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		77%
Surface street bike paths		70%
Hilton Head Island Airport	55%	57%
Retail shopping		54%
Playing fields for sports leagues, tournaments and competitions		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.



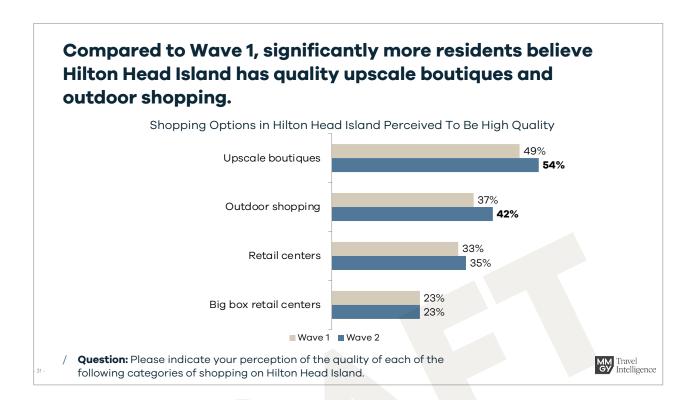
Nearly 8 in 10 residents believe Hilton Head Island has quality signature and upscale dining and outdoor dining.



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

MM Travel Intelligence

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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?



FY 2023-2024 HILTON HEAD ISLAND DESTINATION MARKETING PLAN

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?



81% Wave 1

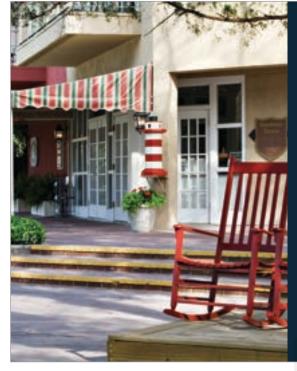
82% Wave:

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

Residents feel that one of the biggest negative aspects about tourism is the traffic it causes both on the roads and mentioned the amount of traffic specifically on Saturdays. Some residents mentioned that many visitors don't 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 affects their own njoyment 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 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

Rising Prices

Other residents cite the rising prices in restaurants and in grocery stores as a negative aspect of prices of housing on Hilton Head Island which is pricing out long-time families, and the Island workforce.



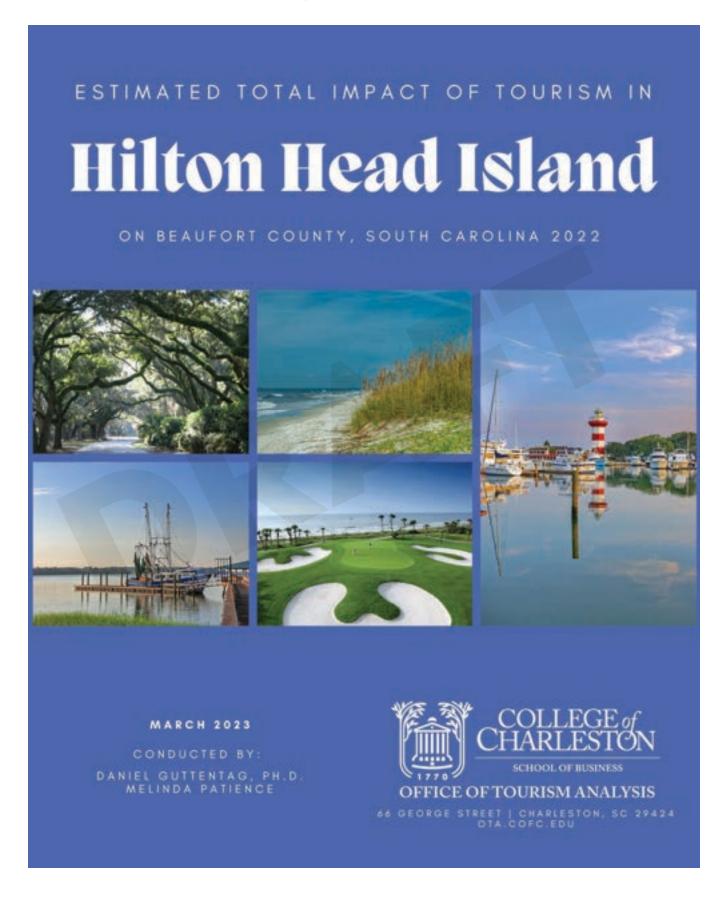
Top Concerns Facing The Community

	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		
Repurposing/modernizing Island commercial buildings		
Mid-Island initiative and redevelopment (Northridge Plaza, Port Royal Plaza, Mid-Island Park)		
North-island traffic	11%	
Bike safety	9%	
Daytrippers/beach parking at Coligny		
Arts and development of cultural assets (e.g. Mitchelville Freedom Park)		
Other	9%	
None of the above		

 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?

2022 TOURISM ECONOMIC IMPACT REPORT: OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON



Impact of Tourism in HHI on Beaufort County, 2022

Impact of Tourism in HHI on Beaufort County, 2022

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Introduction

This study estimates the economic impact generated by tourism to the Town of Hilton Head Island in the year 2022. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and takes into account the direct spending of the visitors along with the positive secondary effects of such expenditures. The analysis entailed individually estimating the economic impacts associated with various tourist segments, as classified by the visitors' lodging type – villa rental, hotel, timeshare, second homeowners and their non-paying guests, and same-day visitors – and then summing them together for an overall total.

This analysis was conducted by Dr. Daniel Guttentag and Melinda Patience of the Office of Tourism Analysis, which is part of the Hospitality and Tourism Management Department in the School of Business at the College of Charleston.

Methodology

The economic impact estimations undertaken for this analysis involved various steps and diverse data. Initially, visitor volume estimates for each lodging type were produced using data on lodging demand, as provided by various third-party entities (e.g., STR and Key Data), combined with visitor behavior data that is collected via a Visitor Profile Survey. The estimated total number of visitors in each segment for 2022 can be observed in Table 1. These figures then were used to estimate the total direct visitor spending associated with each segment. Such spending estimates also relied upon visitor expenditure data collected as part of the previously mentioned Visitor Profile Survey, which asks respondents about

their spending in over a dozen categories (e.g., lodging, food, transportation, and activities). The list of expenditure categories, and the total estimated direct expenditure in each category for 2022, can be observed in Table 2.

The previously described data subsequently were used to determine average per-person expenditures. These figures were combined with the estimated visitor counts and used as inputs for a regional economic impact modelling tool, IMPLAN. IMPLAN is an inputoutput (I-O) model that uses regionalized economic data and other information to determine economic output that accounts for direct expenditure and the secondary benefits of such expenditure (i.e., indirect and induced impacts). The model further estimates labor impacts and tax revenues.

Table 1. Number of HHI Visitors

Segment	Visitors
Villa Rental	951,126
Hotel	497,574
Timeshare	481,461
Second Homeowner	710,673
Non-Paying Guests	184,428
Day Trip	264,083
Total Visitors	3,089,346

The following metrics, as estimated by the economic impact model, are covered within this report:

• *Employment*: The number of jobs in the region supported by the economic activity, which involves an industryspecific mix of full-time, part-time, and seasonal employment. Seasonal jobs are adjusted to annual equivalents.

1

Table 2. 2022 Estimated Total Expenditure by Spending Category

Category	Totals
Transportation (around the destination)	\$150,636,976
Lodging	\$891,847,254
Food – Dining Out	\$464,961,846
Food – Groceries	\$216,635,427
Shopping	\$298,626,091
Spas	\$36,068,371
Golf	\$63,498,893
Biking	\$29,473,412
Performance/Visual Arts	\$27,283,069
Festivals	\$23,249,282
Museums/Historical Tours	\$27,797,593
Boating/Sailing/Fishing	\$50,851,756
Nature-based Activities	\$20,379,190
Dolphin Tours	\$28,813,926
Tennis	\$15,367,000
Other Expenses	\$115,673,977
Total Expenditure	\$2,461,164,060

- Labor income: All forms of employment income, including employee compensation (wages and benefits) and proprietor income.
- **Output:** The total value of industry production, which for the service sector represents total sales, for the retail sector represents gross margins, and for the manufacturing sector represents sales minus inventory change.
- **Direct:** The initial effects to local industries that are directly receiving the expenditures of interest.
- *Indirect*: The secondary effects resulting from business-to-business purchases in the supply chain occurring throughout the region, as triggered by or in support of the direct expenditure activity.
- *Induced*: The ripple effects in the region resulting from household spending of

- income, after the removal of taxes, savings, and commuters.
- *Taxes*: These revenues take into account a variety of taxes, including sales tax, property tax, and income tax. These figures do not account for tourism taxes, such as accommodation taxes.

Results

Following two years of travel behavior being largely shaped by the pandemic, in 2022 travel returned to much more traditional patterns. In particular, urban and international travel, together with business and group travel, rebounded considerably, after previously lagging behind in the travel recovery. As a result, the spike in visitation experienced by many non-urban destinations in 2021, precipitated by the increased appeal of outdoor recreation, did not continue. This shift in travel

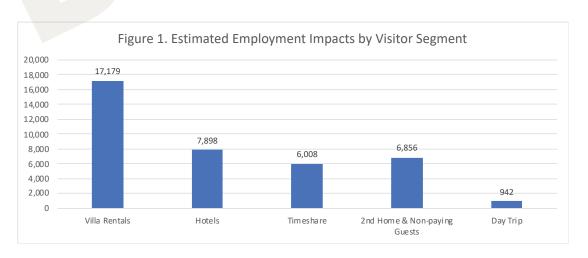
behavior inevitably impacted tourism visitation on Hilton Head Island. Nonetheless, the estimated number of visitors in 2022 remained just shy of the record-breaking number set in 2021, and still well above other prior years. Moreover, despite the slight decline in visitor volume, an increase in expenditures led to a record-breaking overall economic impact.

A total of **3.09 million visitors** came to Hilton Head Island in 2022, down 1.2% compared to 2021, up 18.5% compared to 2020, and up 15.1% compared to 2019. The overall economic impact of this tourism on Beaufort County was **\$3.18 billion**, up 13.7% compared to 2021, up 131.6% compared to 2020, and up 110.6% compared to 2019. This economic impact represents not just the direct expenditure by visitors, but also the secondary ripple effects of such economic activity that occur as tourism businesses spend operating funds and as tourism dollars are re-spent within the region. Hilton Head Island tourism also supported an estimated 38,883 jobs, which represent 33.4% of all jobs in Beaufort County, as per employment data provided by the Bureau of Economic Analysis. Similar to the economic impact figure, this employment figure does not refer solely to jobs within the tourism sector, but rather to a combination of full-time, parttime, and seasonal jobs that are both directly and indirectly supported by the broader

tourism economy and its secondary effects on non-tourism industries and enterprises. Impact estimates for each of the visitor segments are presented in the Appendix (Tables A1 - A6), and the employment impacts are presented in Figure 1.

A total output multiplier for tourist spending was calculated using the model estimates. This multiplier represents the ratio of total economic impact to direct spending. The estimated output multiplier for Hilton Head Island tourism on Beaufort County was 1.29. This signifies that every dollar spent by tourists on Hilton Head Island increased output in the overall Beaufort County economy by a total of

The tourist expenditures generated an estimated \$37.86 million in tax revenues for local Beaufort County governments. The Town of Hilton Head Island earned an additional \$44.55 million in accommodations tax, hospitality tax, and beach preservation fees, as reported by the Town of Hilton Head Island Revenue Services. Together, this \$82.41 million in tax revenue represents a Return on Tax Investment (ROTI) of 25.59, based on the \$3.22 million that was spent on destination marketing in 2022. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of \$25.59 in local tax revenue.



Appendix

Table A1. Villa Rental – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	13,962	\$500,912,304	\$916,002,279
Indirect	1,525	\$73,901,581	\$218,350,722
Induced	1,691	\$77,927,777	\$265,261,117
Total	17,179	\$652,741,661	\$1,399,614,117

Table A2. Hotel – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	6,299	\$171,614,292	\$469,074,060
Indirect	953	\$47,451,828	\$142,596,404
Induced	647	\$29,782,707	\$101,386,013
Total	7,898	\$248,848,828	\$713,056,476

Table A3. Timeshare – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	4,881	\$157,965,810	\$317,159,182
Indirect	578	\$28,009,648	\$86,728,859
Induced	548	\$25,247,307	\$85,943,521
Total	6,008	\$211,222,765	\$489,831,562

Table A4. Second Homeowner & Non-Paying Guests – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	5,639	\$130,896,721	\$321,792,861
Indirect	727	\$35,152,724	\$115,768,713
Induced	491	\$22,616,474	\$76,994,785
Total	6,856	\$188,665,918	\$514,556,358

Table A5. Day Trip – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	784	\$20,852,224	\$41,268,431
Indirect	84	\$4,088,220	\$13,402,478
Induced	74	\$3,425,506	\$11,663,632
Total	942	\$28,365,950	\$66,334,541

Table A6. Total, All Segments – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output			
Direct	31,565	\$982,241,351	\$2,065,296,812			
Indirect	3,867	\$188,604,001	\$576,847,176			
Induced	3,451	\$158,999,771	\$541,249,066			
Total	38,883	\$1,329,845,122	\$3,183,393,054			
Estimated Local	Estimated Local Tax Revenue					
Local Tourism Ta	\$44,547,543					
Total Estimated L	Total Estimated Local Tax Revenue					

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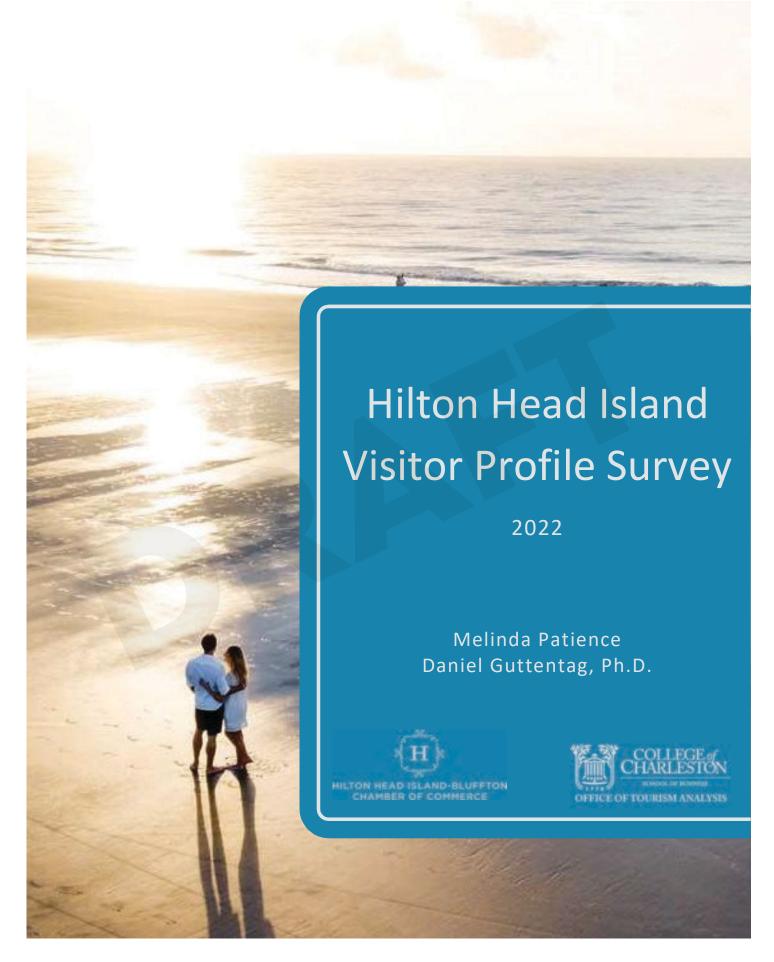
Table A7. Top 50 Industries Impacted by HHI Tourism

	Industry	Output
1	Non-hotel accommodations	\$687,381,483
2	Full-service restaurants	\$491,828,454
3	Hotels and motels, including casino hotels	\$204,504,361
4	Miscellaneous store retailers	\$167,075,131
5	Transit and ground passenger transportation	\$151,414,086
6	Other real estate	\$143,443,550
7	Fitness and recreational sports centers	\$110,394,292
8	Owner-occupied dwellings	\$107,904,159
9	Food and beverage stores	\$87,604,812
10	Management of companies and enterprises	\$63,753,562
11	Water transportation	\$51,060,404
12	Museums, historical sites, zoos, and parks	\$48,424,484
13	Personal care services	\$37,442,934
14	Scenic and sightseeing transportation and support activities for transportation	\$36,000,850
15	All other food and drinking places	\$33,071,509
16	Performing arts companies	\$29,593,287
17	Other local government enterprises	\$26,560,314
18	Other amusement and recreation industries	\$26,139,044
19	Insurance agencies, brokerages, and related activities	\$26,048,109
20	Services to buildings	\$25,181,597
21	Legal services	\$23,853,425
22	Employment services	\$23,525,845
23	Limited-service restaurants	\$22,984,874
24	Monetary authorities and depository credit intermediation	\$22,585,377
25	Offices of physicians	\$21,745,017
26	Securities and commodity contracts intermediation and brokerage	\$19,511,971
27	Nondepository credit intermediation and related activities	\$17,483,707
28	Other financial investment activities	\$16,546,219
29	Management consulting services	\$16,252,891
30	Accounting, tax preparation, bookkeeping, and payroll services	\$14,720,858
31	Maintenance and repair construction of nonresidential structures	\$14,642,407
32	Advertising, public relations, and related services	\$14,019,001
33	General merchandise stores	\$13,612,713
34	Tenant-occupied housing	\$13,229,663
35	Automotive repair and maintenance, except car washes	\$12,805,673
36	Landscape and horticultural services	\$12,280,655
37	Nonstore retailers	\$12,142,185
38	Postal service	\$11,562,467
39	Hospitals	\$10,301,346

	Industry	Output
40	Gasoline stores	\$9,454,311
41	Radio and television broadcasting	\$9,037,948
42	Car washes	\$8,997,574
43	Electric power transmission and distribution	\$8,649,257
44	Waste management and remediation services	\$8,190,177
45	Building material and garden equipment and supplies stores	\$8,138,358
46	Funds, trusts, and other financial vehicles	\$7,870,797
47	Clothing and clothing accessories stores	\$7,220,177
48	Marketing research and all other miscellaneous professional, scientific, and technical services	\$6,759,883
49	Warehousing and storage	\$6,481,737
50	Offices of dentists	\$6,393,265

2022 VISITOR PROFILE STUDY:

OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON



PREPARED FOR: HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

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.

2

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%).











HILTON HEAD ISLAND VISITOR PROFILE SURVEY

2022

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



120 FY 2023-2024 HILTON HEAD ISLAND DESTINATION MARKETING PLAN

2022 DIGITAL AND SOCIAL MEDIA MARKETING RECAP:

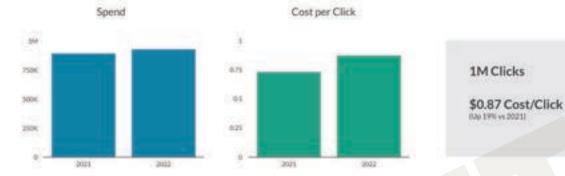
VERB INTERACTIVE

HILTON HEAD ISLAND PROPER

GOOGLE PAID METRICS

Comparing 2021 and 2021, the cost per click was increased 19% from .73 to .87 cents. This is common as of recent given inflation. Under \$1 CPC is under the average benchmark. These ads drove over 1M users to your website.

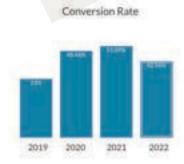
This data includes HHI, HHI Co op. and SCRPT (when applicable).

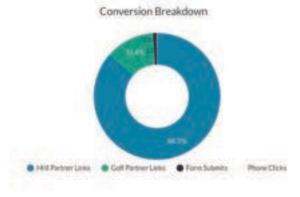


HILTON HEAD ISLAND PROPER

CONVERSION RATE OVERVIEW

- HHI draws 1.3M conversions, down slightly YOY. Due to increased traffic to the site in 2021, our conversion rate decreased by -16%.
- The majority of conversions are outgoing links to partners (86%). Golf occounts for 12% of conversions. Form Submits and Click to Call actions drove 9% between the two.

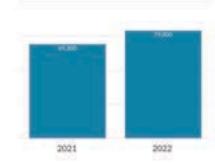


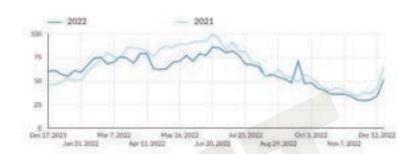


HILTON HEAD ISLAND PROPER

SEARCH INTEREST

- . In 2022, global monthly search volume increased 14% vs PY. Search interest reached a peak in late June and the first week of July.
- Outside of South Carolina, three of the top Brand interest markets are consistent with PY. Georgia, North Carolina, and West Virginia were the top search markets consistent with trends in 2020 & 2021. Kentucky has replaced Ohio as the fourth-highest search interest market outside of South Carolina.
- Top terms used to search for Hilton Head Island were hilton head island, hilton head seather, hilton head south carolina, hilton head so, hilton head hotels, hilton head resorts, hilton head golf courses, and things to do in hilton head.



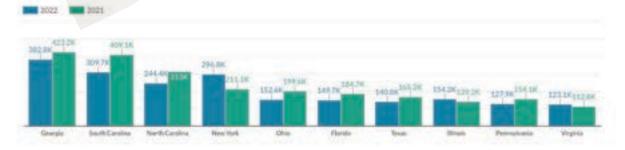


HILTON HEAD ISLAND PROPER

DMAs

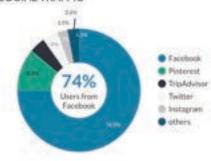
 In 2022, the top 10 DMA traffic remained fairly steady compared to the PY. The top 5 DMAs drive 75% of all traffic to the website. South Carolina had the largest decrease at -19% YoY.

Top 10 Markets



HILTON HEAD ISLAND

SOCIAL TRAFFIC



- Facebook is the key driver for the majority of the social traffic to the website, accounting for 74.22% of the social sessions.
- Pinterest saw a decrease from the previous year, However it remained our second highest traffic contributor at 11.74% of total sessions.

Social Traffic Engagement

	Bocial Network	Senion *	% Sessions of Total	Fages / Session	Avg Ses	nion Duration
1.	Fairbook	56,197	7422%	147		00:00:58
2	Princest	1.725	31,74%	134		000135
1	Teltor	2.119	4345	146		000011
4	TripAdvisor	1090	4295	170		(00.02.01
	Integrate	1212	2596	177		000119

HILTON HEAD ISLAND PROPER

PAGE PERFORMANCE

Other shan the homepage, the offers page is the most popular page for users to visit. After the offers page, see & do page also attracts engagement from our audience.

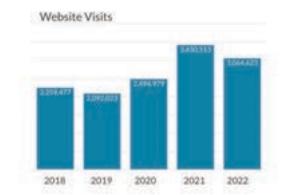
Top Pages

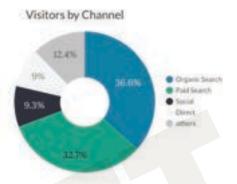
	PAPE	Pagestres +	% of Total Experience	Avg. Time on Page	Resider State
1.	-6	803/00	1480	000834	\$5,60%
1	after block in our section of the control of the co	96,09	kitte	000427	5554%
à.	bracks	408.004	710%	000128	24109
4	MACHINE ERECUES.	147189	28%	0005.64	22.0%
1.	Avenue	141799	14%	0001.00	eats
A-	SSA.	120,589	230%	dediced	15475
	isser/accord former within	120,322	2.37%	000648	26 NO.
1.	affect	\$13.206	1.00	000057	10.00%
*	desi-de/bracks	3,07,760	189	000237	6045
n	Designation and the Company of the C	12367	1,57%	00043e	20,39%

HILTON HEAD ISLAND PROPER

TOTAL WEBSITE VISITATION

- In 2022, there were 2.06M visits to the hiltonheadisland.org website. Search traffic (organic and paid) contributed the majority of traffic to the website (69.3%). Traffic to the website decreased by -10.67% vs. PY.
- 67.98% of users navigated to the site from a mobile device, followed by 26.67% on a desktop and 5.36% from a tablet.





2022 PUBLIC RELATIONS YEAR IN REVIEW:

WEBER SHANDWICK









Forbes

Where To Go For The Best Dining And Drinking On Hilton Head Island



The ample activities (golf, tennis, biking and of course beach time), at one's disposal on South Carolina's Hillron Head Island tend to entilities the culinary offerings. But these days, any visitor would be remiss in overlooking the food and driek opportunities—schetler you check out the new distillery coafting bourbon with a local rice or a family-run restaurant harvesting their own system and soft shell crab -osting and drinking see the new trans sport in Hilton Head.



Where To Find the Briniest Oysters and Most Succulent Crab on Hilton Head Island



O ne visit to Hilton Head biland and it's clear why the area is in amous for its instead — experially when it comes to operes and

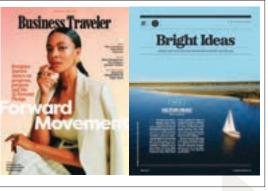
Nearly every aspect of life on Hillow Head labored is influenced by a series. of nuteroups. The island is shaped like a slow-broad Cowk rats through the public; your the askle, Skull Creek separates Hillon Head from Plackney Island, closes to the beel, you'll find the survey of the Atlantic Ovent Jopping against the shore; and now the toes pur'll find the Hiland's Innete Lightheuse and the Calibogue Sound.







ASSOCIATION







Fatherly The Non-Alcoholic Spirit Boom is Here. These 7 Bottles Are Worth a Try

Friendly Vacation PULSE Destinations





BLACK HISTORY MONTH, GET TO CHONE THE GULLAN PROPER, ONE. OF THE MOST CLUTCHALLY DISTINCTIVE APRICAN AMERICAN COMMUNITIES IN THE U.S.



TRAVEL+ LEISURE

10 Best Mother-daughter Trip Ideas - From Road Trips to Wine Tasting

Head to the shore.

Coldente commer pelli pitali filled molles disaphier (cont. prisono). Whether propertie in lay and in the cost, take a discretization in the prod familial at surfing the artists' options are analysis. Auto dust bright to long year accrease, some supplying, and a series of bit, and advanture, its for whole to gr, Cape Cod, inches mad, and the fractio fress we at analysis in











MidwestLiving

Incredible Beyond-the-Midwest Beach Vacations to Book Now

If You're Taking the Kids: Visit Hilton Head, South Carolina

redbook

9 Bike-Friendly Cities To Visit This Summer (And Save Your Gas Money)



MEN'S JOURNAL

Winter Golf: The 10 Best Courses for an Off-Season Escape

Forbes

The Best Places To Stay On Hilton Head Island

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Purelvon

The 12 Most Charming Small Towns in South Carolina

Effetton South Carolina

- Name of Contract of Contract

Reader's Digest

8 Things You Won't See in **Hotels Anymore**

No-pet policies

termine integring a sent lest year, hebits are now esting more and more hav-Salving resolvables processing in "says hallowed Business of Salvings Annex Historic Resid March a story for only house." Will be also seen more expensively and house man officing years have been and between their cours to their about drain, thanes - on has beening han braid forms.

BIZBASH

10 Team-Building Activities to Celebrate International Women's Day

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USNews

32 Romantic & Relaxing Babymoon Ideas



TRAVEL+ LEISURE 11 Best Places to Travel in February Hilton Head, South Carolina is mid in union, as straighter for being outdoors. There's plant, to do a is not in viole at the time to being soldiers. The rising in this bill bill to this, this plant is violed. Next, a best with a political program and (amount) generates. When the amendment board makes soldier many traing your stone beam to explaining if pair their responses to results a those or off man, models of which soldier are found and all motions health and without most flow) these though street many training and the second being the part of the page street. programs, and ups various, debtook mode, and reduct, although experiences for a great start to the new year.



4



3RD HOUR REMOTE BROADCAST / MAY 2022



Following sips provided by Burnt Church Distillery and receiving individually signed Stan Smith sneakers, the anchors awe over being presented the key to the Island - the first time in history!



Featured Hilton Head Island's sea turtle conservation efforts and sustainability efforts.



Mama's authentic BBQ to the Island's iconic sea fare by Hudson's on the Docks and BJ Dennis' tasty Gullah dishes.



Head Island while trying to find their catch of the day.

2022 RESULTS

2,158 MENTIONS 10,863,460,863 IMPRESSIONS \$4,175,026.34 AD VALUE

641 MENTIONS
256,293,968 IMPRESSIONS
\$16,944,020.00 AD VALUE

TOTAL 2,799 MENTIONS 11,119,754,831 IMPRESSIONS \$21,119,046.34

