

An aerial photograph of Hilton Head Island, South Carolina, showing a wide, sandy beach curving along the Atlantic Ocean. The water is a deep blue with gentle waves lapping at the shore. To the right of the beach is a strip of green dunes with sparse vegetation, followed by a residential area with several buildings. The sky is a clear, pale blue with a few wispy clouds near the horizon.

**FISCAL YEAR 2024-2025**

# **HILTON HEAD ISLAND DESTINATION MARKETING PLAN**

**HILTON HEAD ISLAND**  
SOUTH CAROLINA



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# 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 destination and quality of life for all.

The FY 2024-2025 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 Town of Hilton Head Island'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 visitors.





## **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.





# 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 experience the destination, 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 daily.

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

In partnership with the town and in alignment with our community, our destination's core values support our out-marketing efforts.



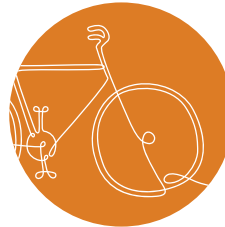
Ecotourism



History



Arts & Culture



Recreation



Wellness



# DEMONSTRATING OUR VALUES

## ECOTOURISM

We will continue to educate and inform residents and guests about the importance of protecting our delicate ecosystem, and the role each individual can play in that. Our efforts throughout Sea Turtle Season to bring awareness to preservation and conservation, continuing to build on the sustainability section of our website, and certifying more island businesses as Sea Turtle Friendly are some of the few ways we continue to educate our residents and visitors about the importance of preserving our delicate ecosystem and the role each individual can play in that effort.

## ARTS & 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, through continued digital and social campaigns. 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.

## HISTORICAL HERITAGE

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 visual storytelling, robust itineraries, and digital campaigns.

## WELLNESS

We will build upon our strong foundation as a wellness destination and work closely with our community partners to develop digital and social media campaigns, build itineraries and programs to drive overnight visitation, and capture new content to showcase Hilton Head Island as an ideal wellness destination.

## RECREATION

Recreation imagery, copy and storytelling will be woven into all of our destination touchpoints, website, digital, social, email and public relations and more. The approach allows us to connect on a deeper level with our visitors regarding our rich recreational assets, our local businesses and community business owners. Utilizing our website, social media, display campaigns, and search engine marketing, we can promote seasonally appropriate activities to ensure consistent visitor engagement year-round.









# DESTINATION GOALS

## A PLAN OF ACTION. A VISION FOR THE COMMUNITY.

Through digital, paid and earned media, and print channels, we will compel our potential visitors to explore Hilton Head Island'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 helping them be good stewards of the Island.

### GOALS 1-5

The following goals outline our continuous efforts to market our destination to potential visitors, and our successes in our out-marketing efforts support our overarching mission of defining and implementing our Community Cornerstone Plan.

1

**CONNECT THE MARKETING PROMISE WITH  
THE ON-ISLAND EXPERIENCE.**

---

2

**CREATE AN UNDERSTANDING OF, AND RESPECT FOR OUR  
DELICATE ECOSYSTEM (RESIDENTS AND VISITOR).**

---

3

**DRIVE DEEPER DISCOVERY AND  
EXPLORATION OF OUR DESTINATION.**

---

4

**BUILD BRAND AWARENESS.**

---

5

**ENHANCE LEISURE & GROUP BUSINESS  
THROUGH QUALIFIED VISITATION.**

---









# GOALS 1-5

GOALS		STRATEGIES
1	CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE	Community campaign and brand bootcamp Resident and visitor surveys Put the Beach to Bed campaign
2	CREATE AN UNDERSTANDING OF AND RESPECT FOR OUR DELICATE ECOSYSTEM	Eco Campaign
3	DRIVE THE DISCOVERY AND EXPLORATION OF THE DESTINATION	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
4	BUILD BRAND AWARENESS	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)
5	ENHANCE LEISURE AND MEETING AND GROUP BUSINESS BY SUPPORTING QUALIFIED VISITATION	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



## KEY PERFORMANCE INDICATORS

Community sentiment survey and continued benchmarking  
Visitor Profile study

Campaign landing page visits

Increase email signups  
Increase time spent on blog  
Increase social referrals  
Increase in content engagement metrics  
Chatbot AI development

Brand lift study  
Website traffic  
Paid media impressions

Website traffic  
Partner referrals  
Home and villa occupancy  
Hotel occupancy  
Direct solicitation for meeting/group (phone, email, social media)  
Sales appointments (sales calls, trade shows, virtual)  
Leads sent to properties

## 2023 RESULTS

Community sentiment survey completed, analysis can be referenced in the Appendix  
Visitor Profile Study completed, analysis can be referenced in the Appendix

Turtle landing page metrics:  
Sessions: 33,499  
Partner Referrals: 2,762  
Bounce Rate > Change to Engagement Rate: 62.37%  
Time on Site > Change to Avg Session Duration: 2:23  
Pages per Visit > Views per Session: 1.58

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%)

Brand lift study being conducted spring 2023  
Website traffic 3,064,623 (-10.2%)  
129 million paid partner media impressions

Website traffic 3,064,623 (-10.2%)  
1,610,210 partner referrals (-5.2%)  
**Home and Villa**  
Occupancy 45% (+4%) ADR \$496.00 (+13%) RevPar \$221.00 (+18%)  
**Hotel**  
Occupancy 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



# 2024-2025 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  
Martha Stewart Living, Weddings

## SEP-OCT

### CAMPAIGNS

Oyster/Dining Digital Campaign  
Concours d'Elegance  
Crescendo

### CONTENT THEMES

Weekend Getaways  
Lowcountry Dining (Oyster Season)

### TRADITIONAL MEDIA PLACEMENTS

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

## NOV-DEC

### CAMPAIGNS

Holiday Travel  
Giving Tuesday  
Seafood Festival  
Wine + Food  
Crescendo  
Oyster Festival  
Lantern Parade

### CONTENT THEMES

Thanksgiving  
Holidays

### TRADITIONAL MEDIA PLACEMENTS

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

\*Traditional media placements are examples of partnerships and publications that have been successful for the destination in the past, and remain as opportunities in the future.





## JAN-FEB

### CAMPAIGNS

Foodie February  
Gullah Celebration  
Wine + Food  
Seafood Festival  
Bravo! Piano Competition  
Restaurant Week  
Travel + Leisure Voting  
Darius Rucker Golf Tournament

### CONTENT THEMES

Fresh Start  
Lowcountry Love

### TRADITIONAL MEDIA PLACEMENTS

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

## MAR-APR

### CAMPAIGNS

RBC Heritage  
Travel + Leisure Voting  
Condé Nast Traveler Voting  
WingFest

### CONTENT THEMES

RBC Heritage  
Spring in Swing: Golf, Fishing, Biking

### TRADITIONAL MEDIA PLACEMENTS

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

## MAY-JUN

### CAMPAIGNS

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

### CONTENT THEMES

Wildlife/Conservation  
Ready for Summer

### TRADITIONAL MEDIA PLACEMENTS

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



# BUDGET

## HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

Hilton Head Island Visitor & Convention Bureau Schedule of Functional Revenues and Expenditures  
FY 2024-2025 BUDGET

	VCB	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co DMO	Membership
<b>Revenues</b>								
Town of HHI DMO	4,000,000	4,000,000						
Private Sector	475,000		475,000					
SCPRT Destination Specific	625,000			625,000				
SCPRT Coop	625,000				625,000			
Private Match Coop	2,600,000				2,600,000			
Town of Bluffton DMO	350,000					350,000		
B/C Bluffton & Daufuskie	365,000						365,000	
<b>Total Revenues</b>	<b>9,040,000</b>	<b>4,000,000</b>	<b>475,000</b>	<b>625,000</b>	<b>3,225,000</b>	<b>350,000</b>	<b>365,000</b>	<b>1,950,000</b>
<b>Membership Revenue</b>								
<b>Total Revenues with Membership</b>								
<b>Expenses</b>								
<b>Media Partnerships</b>								
Media Buys	960,000	776,107	49,337	134,556				
	960,000	776,107	49,337	134,556				
<b>Social / Media</b>								
Partner Promotions	60,000	48,507	3,084	8,410				
Paid Brand Social Media	170,000	137,436	8,737	23,828				
Social Media Management	76,317	61,698	3,922	10,697				
Sub-total	306,317	247,640	15,743	42,934				
<b>Digital Marketing</b>								
Digital Strategy, Web Maintenance & Support	80,000	64,676	4,111	11,213				
Technology Improvements	60,000	48,507	3,084	8,410				
SEO	24,000	19,403	1,233	3,364				
SEM / Display	569,754	460,614	29,281	79,858				
Managed Web Hosting and Content Delivery Network	1800	1,455	93	252				
eNewsletter/Drip Campaign	30,000	24,253	1,542	4,205				
Digital Contingency	0	0	0	0				
Sub-total	765,554	618,908	39,344	107,302				
<b>Destination PR</b>								
PR Strategy, Maintenance & Support	276,000	223,131	14,184	38,685				
Journalists/Influencers/Partnerships	50,000	40,422	2,570	7,008				
	18,300	14,795	940	2,565				
<b>TOTALS</b>	<b>50,000</b>	<b>40,422</b>	<b>2,570</b>	<b>7,008</b>				
Monitoring Services (Print/Online/Broadcast Tracking)	394,300	318,770	20,264	55,266				
PR Contingency								
Sub-total								
<b>Group Sales &amp; Marketing</b>								
Promotional Giveaways	50,000	40,422	2,570	7,008				
Program Incentives	2,000	1,617	103	280				
VCB Dues, Subscriptions and Training	90,000	72,760	4,625	12,615				
Tradeshows	35,000	28,296	1,799	4,906				
In-Market Events	15,000	12,127	771	2,102				



Focused Service	1,000	808	51	140
SEM	40,000	32,338	2,056	5,607
Social Media	49,630	40,123	2,551	6,956
Sub-total	282,630	228,491	14,525	39,614
<b>International</b>				
International Promotions and Events	150,000	121,267	7,709	21,024
International Trade Shows	40,000	32,338	2,056	5,607
Sub-total	190,000	153,604	9,765	26,631
<b>Destination Photography &amp; Video</b>				
	75,000	60,631	3,854	10,512
<b>Collateral/Fulfillment</b>				
Vacation Planner	300,000	242,533	15,418	42,049
Fulfillment	120,000	97,013	6,167	16,820
Toll-Free Phone	4,000	3,234	206	561
Sub-total	424,000	342,780	21,791	59,429
<b>Research &amp; Planning</b>				
	214,075	173,068	11,002	30,005

VCB Sales, Mkt. Services & Ops:

Personnel	1,295,000	756,000	202,563	83,125	65,625	91,875	95,813
Benefits	185,000	108,000	28,938	11,875	9,375	13,125	13,688
Operations	370,000	216,000	57,875	23,750	18,750	26,250	27,375
Sub-total	1,850,000	1,080,000	289,375	118,750	93,750	131,250	136,875


	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co. DMO	Membership
SCPRT								
SC PRT - Leisure	1,300,000				1,300,000			
SC PRT - Sports	1,002,749				1,002,749			
SC PRT - Meetings & Groups	828,500				828,500			
Sub-total	3,131,249				0	3,131,250		
Town of Bluffton DMO						218,750		
Promotions	218,750							
B/C Bluffton & Daufuskie DMO							228,125	1,950,000
Promotions	228,125							

<b>TOTAL VCB EXPENSES</b>	9,040,000	4,000,000	475,000	625,000	3,225,000	350,000	1,950,000	10,990,000
Difference b/w Revenue & Expense	0	0	0	0	0	0	0	0
<b>Total Expenses with Membership</b>	10,990,000							
<b>Revenues Minus Expenses :</b>	0							
	Revenues & Expenses for HHI-related marketing programs							
	Revenues & Expenses for other marketing programs							




# OUR TARGET LEISURE TRAVELER


2023 VISITOR PROFILE STUDY



**\$150-  
\$199K+**  
Affluent Traveler



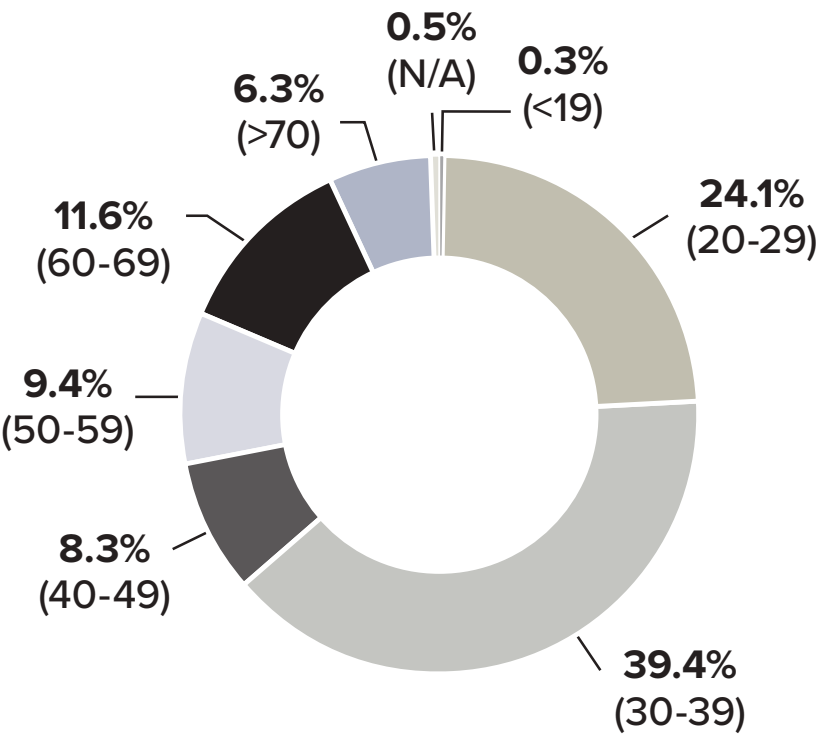
**56%**  
Undergraduate  
Degree or  
Higher



**2-4** Trips per Year  
**7** Nights Average  
Length of Stay

*\*2023 Visitor Profile Study:  
Office of Tourism Analysis,  
College of Charleston*

## AGE DISTRIBUTION



## DEMOGRAPHICS AND PERSONAS



Weekenders



Families



Snowbirds



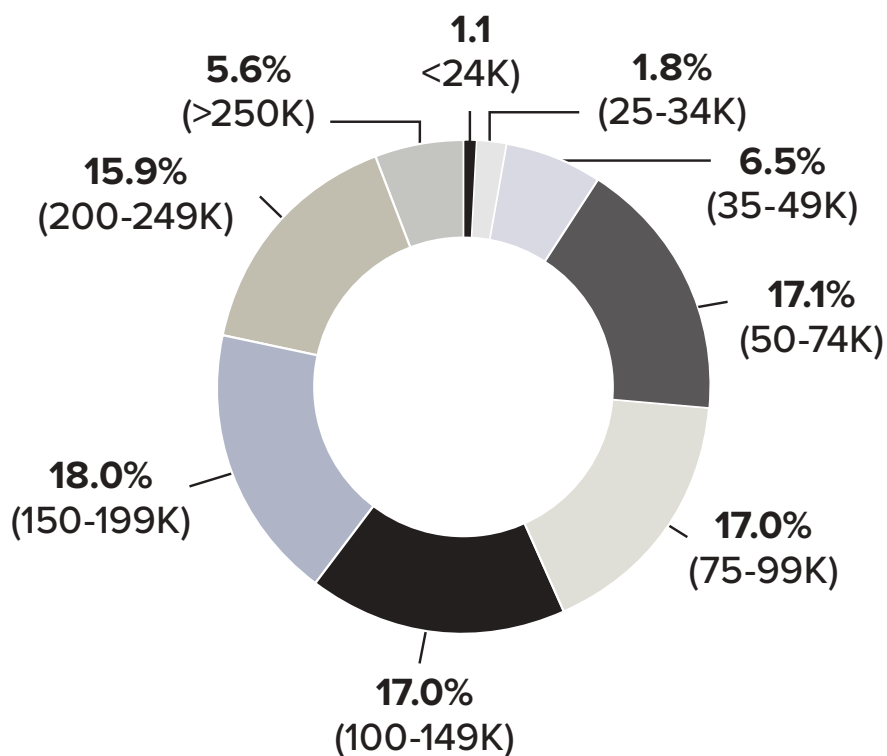
Sports  
Enthusiasts



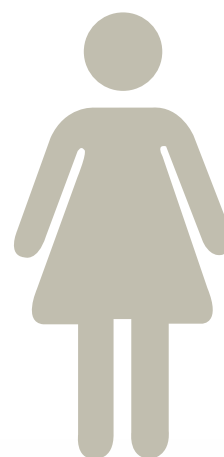
Culinary  
Explorers



## HOUSEHOLD INCOME DISTRIBUTION



**45%  
MALE**



**55%  
FEMALE**



Wellness  
Traveler



Arts, History &  
Cultural Enthusiasts



International  
Travelers



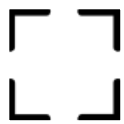




# STRATEGIC MARKETING PLAN

# MARKETING PLAN STRATEGIES & TACTICAL DETAILS

The ultimate goal of the marketing strategy is to connect like-minded visitors with the destination through an “always on” approach with a series of media touch points that bring our destination values forward.



## 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 by engaging with the Gullah community, sustainability and conservation partners, and others.

This will be done through organic integration across our social, blog, and email channels in the form of copy, photos, and videos.



## DESTINATION WEBSITE PLATFORMS

In the upcoming year, following the launch of our new website, we are committed to further enhancing and optimizing the platform to prioritize our destination marketing values. As we continue to make updates, our goal is to ensure that these priorities remain at the forefront of the user experience.

With the release of our new website, we have laid the foundation for a more immersive and engaging online presence. Now, our focus shifts to refining and fine-tuning the user journey, ensuring that visitors are seamlessly guided towards exploring the unique aspects of our destination.

From showcasing family-friendly attractions to highlighting our renowned golf courses and rich cultural experiences, every aspect of our website will be designed to captivate and inspire our audience. Through strategic optimizations and enhancements, we aim to create a platform that not only informs but also evokes a sense of excitement and curiosity about Hilton Head Island.

As we embark on this journey, our commitment to excellence remains unwavering. We will continue to listen to feedback, analyze data, and implement innovative solutions to deliver an exceptional online experience that truly reflects the essence of our destination.

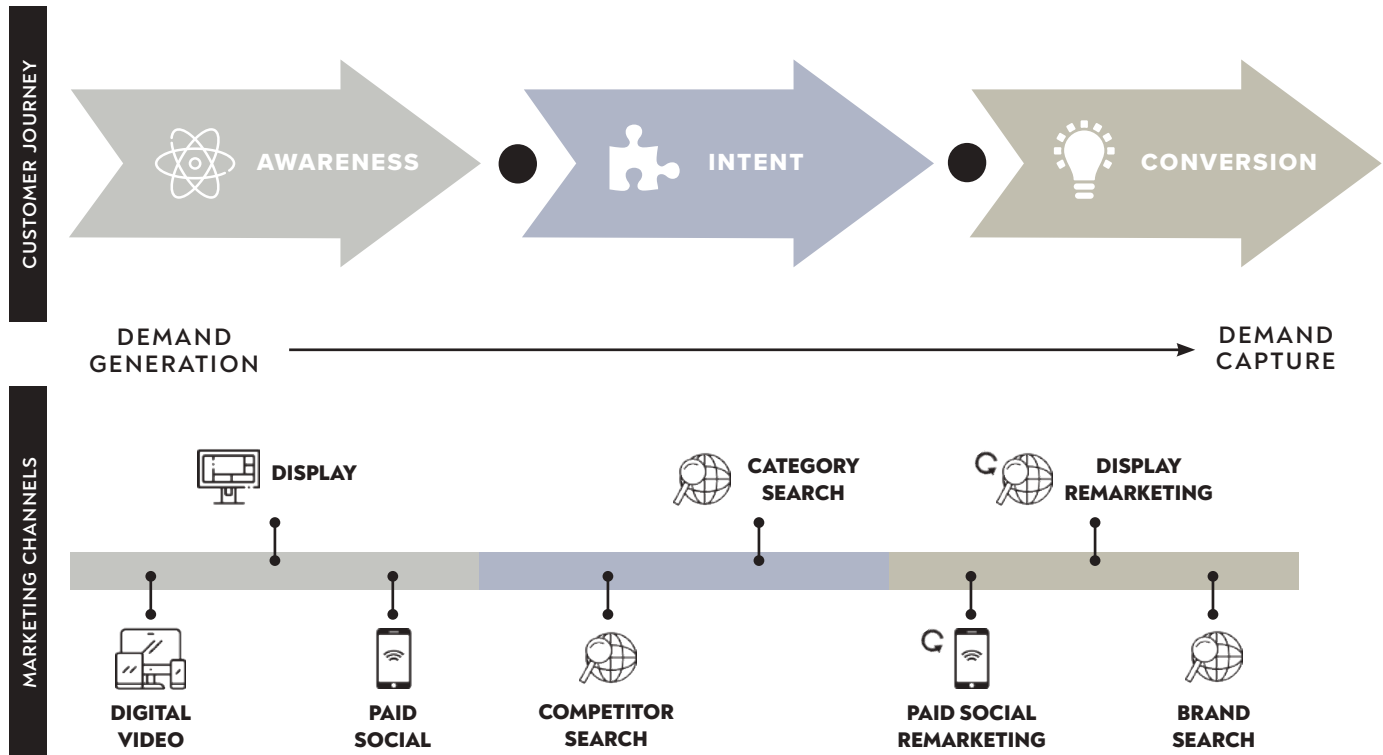


## RESIDENT AND VISITOR SATISFACTION SURVEYS

The Hilton Head Island-Bluffton Chamber of Commerce, under the Destination Marketing Organization contract, will report on resident and visitor satisfaction annually through surveys. Using these insights, they'll craft a comprehensive plan to engage the community. Regular tourism updates will enhance residents' awareness of tourism's benefits, stimulating the regional economy and improving quality of life. Campaigns will be strategically deployed based on defined goals aligned with the overarching marketing plan, ensuring alignment with the customer journey at every stage.



## AUDIENCE TARGETING WITH DIGITAL MEDIA



Our efforts begin with awareness and intend to move potential visitors down the funnel to eventual conversions. Potential visitors will see our destination videos and ads across social media, and through targeted remarketing efforts will eventually start to search for Hilton Head Island directly.

The 2024-2025 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



### VIDEO IN CONTENT MARKETING

Seasonal highlights, color-driven Reels, 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.



## DIGITAL ADVERTISING

The focus on qualified yet efficient digital media channels continues to be a core focus of the 2024-2025 digital advertising strategy. Our digital marketing efforts will focus on performance marketing channels that will enable the destination to purchase and connect with highly qualified audience targets on a cost-effective basis to drive maximum performance for the destination.

Working media dollars will be heavily allocated toward performance channels (Brand Search, Category Search, Performance Max, and Social Remarketing). This will be supported by digital video and streaming audio advertising efforts to build awareness of the destination.

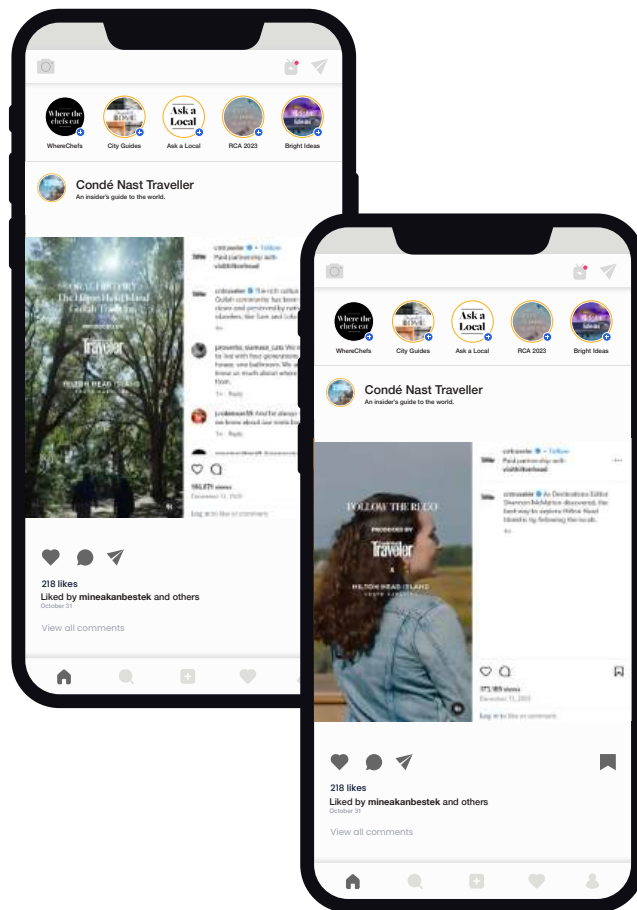


## EMAIL

Going forward, we aim to leverage interest in the destination by delivering personalized emails tailored to their preferences and interests. To facilitate this, we will update our email preference center to include the destination's marketing pillars, ensuring that subscribers receive content that aligns with their priorities. This change will also include leveraging a new email service provider, Campaigner, to help us optimize the delivery of our communications.

We'll curate content-specific emails that resonate with audiences passionate about these areas. Additionally, we'll run general email campaigns for the broader subscriber list. New subscribers will be welcomed with an automated journey introducing them to the destination, while those requesting a visitor's guide will receive automated emails guiding them further through the customer journey.

Our email strategies will be guided by SEO research and continuously refined through testing and optimization efforts throughout the year.



## EVENT CONTENT

We will work closely with our partners to understand the goals for their event and incorporate our assets and promotion to best fit their needs and KPIs. .

### 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 2024-2025

These are the social channels that best support Hilton Head Island's strategic efforts and where we will focus our priorities for FY 2024-2025.

### FACEBOOK

With 3.05 billion monthly active users, Facebook remains our top social channel. Our page boasts 234.8K likes and growing. In FY 2024-2025, we'll enhance our community by sharing fresh photo and video content, focusing on partner experiences, sustainability initiatives, marquee events, co-op partnerships, and campaigns.

### INSTAGRAM

As Instagram evolves, we'll stay ahead with Reels, the leading content format. Our goal is to share authentic, engaging content that resonates with current trends and keeps us at the forefront of users' feeds.

### TIKTOK

With over a billion users, TikTok is a key platform for travel tips and experiences. We've seen strong growth on our Hilton Head Island channel and will leverage TikTok's evolving features to reach new audiences, repurposing content from Instagram's Reels.

### PINTEREST

Pinterest is a hub for inspiration and planning. We'll continue to showcase destination experiences through itineraries, wellness options, and sustainable activities, driving traffic to our website with optimized SEO.

### SPOTIFY

Through playlists, collaborations, and ads, Spotify offers unique ways to connect with customers. We'll share trending, feel-good music and wellness-themed playlists to engage both new and existing audiences.

### YOUTUBE

YouTube's Shorts emphasize the importance of short-form video. We'll produce content that highlights our destination's key pillars, catering to the platform's engaged audience.

### LINKEDIN

Our LinkedIn account is the go-to for destination updates and industry news. We'll continue sharing relevant updates and content to engage meeting planners and industry professionals.

## TOTAL ORGANIC AUDIENCE 357,284

## 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 for specific audiences.

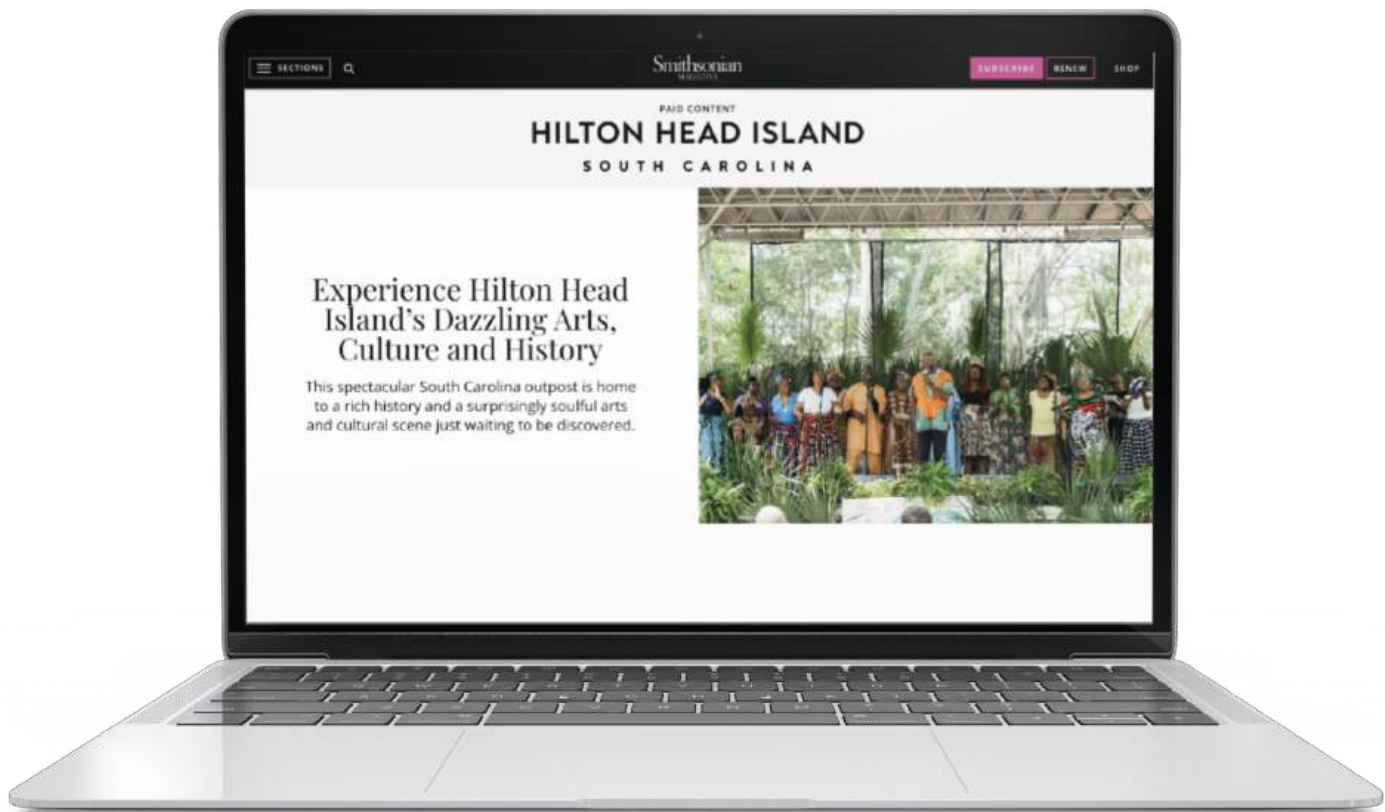
- » For Different Demographics
- » For Different Interests
- » For Different Vacation Lengths

## 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 “must-visit” 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, shoulder-season 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.

## DEPARTURES

### BY THE NUMBERS

**95.4B**  
TRAVEL

**\$19.4B**  
FASHION &  
ACCESSORIES

**\$13.9B**  
AIRLINES

**\$2.4B**  
WINE & SPIRITS

**\$18B**  
LODGING

**\$383.6B**  
OVERALL CARD  
MEMBER SPEND

**35-64**  
CARD MEMBER  
AGE RANGE

**\$5.7B**  
JEWELRY & WATCHES

**NY | LA | MIA | ATL | SF**  
TOP FIVE CITIES

## AUDIENCE

### BY THE NUMBERS

**9.9MM**  
AFFLUENT AUDIENCE

**962,867**  
CIRCULATION

**11.3MM**  
DIGITAL UVS

**15.7MM**  
SOCIAL MEDIA  
FOLLOWERS

## DIGITAL ENGAGEMENT

### BY THE NUMBERS

**12.8MM**  
UNIQUE VISITORS

**2:00-5:00+**  
AVERAGE MINUTES  
SPENT WITH NATIVE  
CONTENT

**27.7MM**  
VIEWS

**3:13**  
AVERAGE MINUTES  
SPENT ON A PAGE

## CONDÉ NAST TRAVELER

### BY THE NUMBERS

**\$11B**  
SPENT ON TRAVEL

**1.2X**  
LUXURY TRAVELERS

**1.5X**  
CULTURE SEEKERS

**1.3X**  
CULINARY TRAVELERS

**3.2M**  
PRINT READERS

**4.6M**  
AVG. MONTHLY  
DIGITAL UNIQUES

**22M**  
AVG. MONTHLY  
VIDEO VIEWS

**9M**  
SOCIAL FOLLOWERS

## KINGDOM

### BY THE NUMBERS

**761K**  
TOTAL READERSHIP

**171K**  
SOCIAL FOLLOWERS

**205K**  
PRINT DISTRIBUTION

**60K**  
EMAIL SUBSCRIBERS



PRIVILEGED AND CONFIDENTIAL



# DESTINATION PUBLIC RELATIONS



## In 2024-2025, the Hilton Head Island – Bluffton Chamber of Commerce will employ a forward-looking strategic and thoughtful public relations plan that is designed to distinguish Hilton Head Island (HHI) from competitors and convert first-time visitors to repeat guests.

Despite economic challenges, travel has returned to pre-pandemic levels, confirming consumers' priorities and importance on travel. However, new consumer behaviors have emerged, and the media landscape remains ever-changing. Travelers are looking to vacation where they can truly embrace the destination—both physically and culturally—through “slow travel.” Plus, consumers continue to prioritize affordability and accessibility via shoulder season opportunities. These preferences align with HHI's offerings, and we'll work to elevate the Island's Lowcountry appeal to attract travelers.

Along with executing our tried-and-true PR tactics, we'll leverage our strong media relationships and trends to ensure HHI remains in consideration as a must-visit domestic Island destination.

### **MEDIA LANDSCAPE**

We continuously monitor industry changes and trends that dictate the ever-evolving landscape to adapt accordingly. Key factors driving current changes across the industry include:

**MEDIA LAYOFFS:** As of 2024, there have been multiple walk outs and rounds of media layoffs at national media publications, such as Conde Nast Traveler, VOGUE, Forbes, National Geographic, Business Insider and more. As such, we anticipate that on-staff writers will endure more competition for stories and be strapped for time as they take on additional beats and assignments. We'll see an increased reliance on freelancers and contributors, as well as fewer original stories and more syndication.

**CROWDED MEDIA ENVIRONMENT:** Grabbing consumer attention is harder than it's ever been, with audiences overloaded with content, so much so that the average person scrolls through an average of 300 feet of digital content every day.

We'll ensure that HHI breaks through culturally across mediums by engaging print, digital, broadcast and social platforms, and focus on garnering stand-alone feature stories that differentiate the Island amongst competitors.

**BOOKED AND TRAVELING:** Journalists are back on the road and their calendars are often booked up 6 months in advance. As such, we'll need to continue to look ahead to secure IPTs and additional media visits earlier than usual.

### **TRENDS TO CONSIDER FOR HILTON HEAD**

Shifts in consumer habits present opportunities for HHI to leverage existing assets and tap into current and anticipated trends, such as:

**SLOW TRAVEL:** Consumers are opting to slow down, enjoy the present and immerse themselves in a destination's daily rhythms instead of rushing from one tourist spot to the next.

**SHOULDER SEASON POPULARITY:** Consumers are choosing to travel during shoulder seasons to avoid crowds and costs

**DESTINATION DUPES:** Travelers are looking for “destination dupes” that allow them to swap out more expensive and far-flung destinations to save money and avoid the crowds.

**SUSTAINABLE TRAVEL:** Younger demographics want to make an impact on the destination they visit, and plan to continue prioritizing sustainable and travel.

### **TARGET AUDIENCES**

While our targets are familiar, we'll find new and engaging verticals 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, especially considering new travel trends such as skip-gen travel, where grandparents are taking their grandkids on vacation.

**REGIONAL DRIVE MARKETS:** As consumers prioritize affordability and accessibility, we'll engage media in local drive markets such as Atlanta and Florida.

**HIGH VALUE CONSUMERS:** We'll connect with consumers with more disposable incomes by targeting luxury publications to promote the Island's bespoke experiences.

### PRIORITY FOCUS AREAS

We've aligned with Weber Shandwick on priority angles across key verticals that we believe provide potential for growth opportunities, high consumer interest and strong mediability, to highlight HHI's unique culture, allure, and more:

**HISTORY/GULLAH CULTURE:** Elevate the Gullah-Geechee community via compelling storytelling angles and spokespeople to comment on their past, present and future.

**ECOTOURISM:** Leverage the Island's history as the country's first eco-planned community and showcase the efforts to support the local community, such as turtle conservation and oyster reclamation.

**ARTS AND CULTURE:** Encourage visitation to museums and marquee events including on-Island experiences, such as:

- RBC Heritage PGA TOUR Tournament
- Hilton Head Island Motoring Festival & Concours d'Elegance
- Hilton Head Island Seafood Festival

**WELLNESS AND RECREATION:** Position the Island's variety of recreational offerings including but limited to its miles of bike paths, white sand beaches, sports such as pickleball and tennis. Highlight the variety of wellness experiences available to travelers, including properties such as Hilton Head Health.

**CULINARY:** Spotlight robust culinary scene from Gullah cuisine to local seafood and local chef stories.

### 2024-2025 PR TACTICS

We'll employ a variety of PR tactics to seamlessly spread destination news far and wide throughout the year. Efforts will include:

#### VISITING JOURNALIST/INFLUENCER PROGRAM:

Craft narratives that will meaningfully resonate with travelers by customizing media and influencer itineraries that highlight priority verticals and evergreen offerings.

**PAID INFLUENCER PROGRAM:** Strategically identify influencers with dedicated audiences for paid influencer partnership opportunities that will inspire travel to HHI across Instagram and TikTok.

**ALWAYS-ON MEDIA RELATIONS:** Develop timely news bureau engine to pitch HHI's diverse offerings as well news jack larger consumer moments and incentivize travel to the destination.

#### STRATEGIC PARTNERSHIPS AND SPECIAL

**PROJECTS:** Encourage travel by partnering with like-minded brands that will engage new and existing audiences and elevate HHI in cultural conversations with multiple touchpoints and scalable executions.

Condé Nast  
**Traveler**

**BRIDES**

**VOGUE**

THE  
**POINTS  
GUY** 

**Southern Living**

**Smithsonian**  
MAGAZINE

**TRAVEL+**  
**LEISURE**





# MEETINGS & GROUP SALES

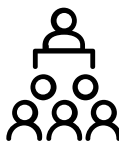
The meetings and group industry continues to recover, and Hilton Head Island offers a unique opportunity for groups of all sizes.

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.



## Corporate Hosting

Whether you're hosting a small executive meeting or a large conference, our versatile facilities can be tailored to suit your requirements, ensuring a seamless and successful event.



## Association Events

Inspire and energize your attendees. Collaborate, build relationships, innovate, and create in our one-of-a-kind atmosphere.



## Reunions

The Lowcountry landscape was made for reunions. Accessible, affordable, and delightfully different, along with all the must-haves for a perfect get-together.



## Family & Military Groups

Operation Unwind. From a weekend getaway for two, large family gatherings and everything in between, affordable fun and relaxation awaits.



## Motorcoach Tours

Our dynamic destination is a short drive from Beaufort, Savannah, and Charleston—with wonderful accommodations, amenities, and experiences for everyone.



## Religious Groups

Welcoming, warm, and relaxed settings create the perfect destination for spiritual nourishment, a sense of belonging and connection with like-minded individuals.



## Government Groups

Host representatives from various government organizations to discuss policies, initiatives, and challenges, in order to seek innovative solutions.









# INTERNATIONAL MARKETING

## OUR STRATEGY

The international market is open, potential guests from Canada and Europe eager to visit our shores. Internationally, we see potential guests booking travel further ahead, while a desire for luxury and experiences continues to dominate the landscape. Those in the international, upper-tier household income bracket we are already targeting, are ready to travel and splurge.

With strong partnerships with the U.S. Travel Association and Brand USA, we will continue to tap into the international market through tradeshows, working closely with our accommodation partners for packaged opportunities to secure desirable rates to assist with promoting our destination. Available offers and packages will focus on key travel timeframes for this segment and include curated programs and events of this lost business segment due to COVID-19.



# 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 guide to 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 guide 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.



## OUR COMMUNITY CORNERSTONE

The details outlined above map our consistent effort to promote Hilton Head Island as a destination suitable for anyone who wants to experience it, while ensuring preservation and conservation is at the forefront of everything we do. Our execution of our goals and the integration of our destination values throughout all out-marketing efforts are done in support of our Community Cornerstone Plan.









# APPENDIX

## GLOSSARY OF TERMS

### HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

Board of Directors & DMO Marketing Council

## DEMOGRAPHICS

### COMMUNITY CORNERSTONE PLAN

2023 Performance, Goals 1-5

### MMGY INTELLIGENCE

Community Sentiment Survey Executive Summary, Wave 3

### OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

2023 Visitor Profile Study

### OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

2023 Estimated Total Impact of Tourism in  
Hilton Head Island on Beaufort County

### VERB INTERACTIVE

2023 Digital and Social Media Marketing Recap

### WEBER SHANDWICK

2023 Public Relations Recap







# GLOSSARY OF TERMS

## FULFILLMENT

**Fulfillment** - The number of physical vacation planners distributed from requests throughout multiple platforms: online, media and home inquiries. In addition, we also distribute the planner to state and local welcome centers, airports, along with tradeshow and promotional events.

## HOTEL, HOME & VILLA OCCUPANCY

**Corporate Housing** - Lodging created by local businesses and organizations specifically to house seasonal workers.

**Occupancy** - Used within the accommodations industry to gauge the health of tourism. Occupancy percentage is calculated by dividing the occupied rooms by total room supply.

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

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

**Corporate Hosting** - A corporate event is an event that is sponsored by a company within a destination. The event focuses on either the employees or the clients of the company. Corporate events can be anything from a holiday party to an award ceremony.

**Association Events** - A group of people who work in the same industry. They aim to promote their profession, the interests of people and organizations in that profession, and the public interest. They gather regularly, e.g. monthly, quarterly, annually.

## MEDIA PARTNERSHIPS

**Paid Media** - Paid promotional efforts, such as advertising and sponsored content, where payment is made to third parties for placement across various channels.

**HHI** - Household Income noted in Media Partnership section

## PUBLIC RELATIONS

**Earned Media** - Refers to the instances when a destination or brand is featured in content without direct payment.

**Impressions** - This metric quantifies the number of times destination content has been viewed.

**Ad Values** - Sometimes known as AVE, or ad value equivalency, it's a calculation that estimates the value of a story or mention by comparing it to the cost of a comparable ad in the outlet for that coverage.

**Mentions** - Any instance where a brand or individual is discussed in various media, including news articles, social media posts, blogs, and interviews. These mentions contribute to overall visibility and help assess the impact of communication efforts.

**UVPM (Unique Visitors per Month)** - This metric represents the number of visitors to a media outlet.

**Heritage Travel** - A form of tourism in which individuals or groups visit destinations primarily to explore and connect with their cultural, historical, or familial heritage. This type of travel often involves visiting ancestral hometowns, landmarks, museums, historical sites, and other places significant to one's cultural or familial background.

**Sustainable Travel** - Refers to responsible travel practices that minimize negative impacts on the environment, preserve cultural heritage, and benefit local communities economically and socially.

**Shoulder Season** - Refers to the period between the peak and off-peak seasons in travel and tourism. During this time, there is a decrease in tourist activity compared to the peak season, but it's still more active than the off-peak season.

## REPORTING PLATFORMS

**2-Source Report** - The 2-source report is an aggregated report of both Home and Villa and Hotel data.

**Keydata** - Keydata is a real time home and villa platform that allows users to view on the books and historical villa data.

**STR** - Smith Travel Research (STR).



## SOCIAL MEDIA

**Impressions** - The amount of times your content was seen across a feed or in search terms.

**Engagements** - A measurement on how much your audience interacts with your content. This can be measured in likes, comments, shares, etc.

**Total Audience** - Number of followers across each platform combined.

**UGC (User Generated Content)** - Content captured by users online, who have given permission to have their content reposted.

## WEBSITE PERFORMANCE

**Demand Generation** - The strategic efforts aimed at creating interest and awareness among potential customers for a product or service. It involves utilizing various digital channels and tactics to attract, engage, and ultimately convert prospects into leads or customers.

**Demand Capture** - The strategic efforts aimed to target individuals who are already actively seeking your brand with the goal of converting those individuals.

**Visits** - A website visit in Google Analytics 4 (GA4) refers to a period of user interaction with a website. Visits help measure user engagement and interactions on a website within a specific time frame.

**User(s)** - Website users in Google Analytics 4 (GA4) represent individual visitors or devices that access a website within a specified time period. Each user is identified by a unique identifier, allowing GA4 to track and analyze the behavior of distinct individuals or devices interacting with the site.

**Partner Referrals** - This metric refers to external link clicks to partner websites from ads or partner listings throughout the Hilton Head Island website. This helps quantify how many potential visitors we are connecting to local businesses.



# 2024 BOARD OF DIRECTORS

## EXECUTIVE COMMITTEE

### CHAIR

**Jay Wiendl**

The Beach House,  
Hilton Head Island

### IMMEDIATE PAST CHAIR

**Susana Cook**

Hilton Garden Inn

### VICE CHAIR, BLUFFTON REGIONAL BUSINESS COUNCIL

**Mary Lee Carns**

VP Advancement & Workforce  
Development

### VICE CHAIR, BUSINESS EDUCATION PARTNERSHIP

**Bob Cosgrove**

Sonesta Resort Hilton Head Island

### VICE CHAIR, BUSINESS WORKFORCE COALITION

**Lola Campbell, Esq.**

Binya Boutique, LLC

### VICE CHAIR, FINANCE

**Ray Warco**

Center for Strategic Planning -  
USCB

### VICE CHAIR, MEMBERSHIP

**Diana McDougall**

Coastal States Bank

### VICE CHAIR, PUBLIC POLICY

**Ahmad Ward**

Historic Mitchelville  
Freedom Park

### VICE CHAIR, VISITOR & CONVENTION BUREAU

**Mike Tighe**

Westin Hilton Head Island  
Resort & Spa

### PRESIDENT & CEO

**William G. Miles, IOM, CCE**

Hilton Head Island-Bluffton  
Chamber of Commerce

# BOARD OF DIRECTORS

**Jean Beck, RCE**

Hilton Head Area REALTORS®

**Steve Birdwell**

The Sea Pines Resort

**Wayne Boutwell**

Encompass Health Rehab.  
Hospital of Bluffton

**Andrea Bragg**

Forsythe Jewelers

**Joel Braun**

Hargray

**Joe Caruso**

Disney's Hilton Head  
Island Resort

**Andrew Carmines**

Hudson's Seafood House  
on the Docks

**Chris Corkern**

Prudential Services

**Berl Davis**

Palmetto Electric  
Cooperative

**Caleb Graham**

Ocean Oak Resort by  
Hilton Grand Vacations

**Greg Kelly**

Savannah/Hilton Head  
International Airport

**John McGaunn**

Montage Palmetto Bluff

**Walter Nester**

Burr & Forman

**Jon Rembold**

Hilton Head Island Airport

**Andrew Schumacher**

Palmetto Dunes P.O.A.

**Joel Taylor**

Hilton Head Regional Healthcare

**Steve Wilmot**

Heritage Classic Foundation

**Alan Wolf**

SERG Restaurant Group



# FY 2024-2025 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 committee monitors the plan's effectiveness and results making recommendations for improvements and enhancements when needed.

## **Vice Chairman, Visitor & Convention Bureau**

**Mike Tighe**

Westin Hilton Head Island Resort & Spa

## **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  
Hilton Beachfront Resort and Spa

## **Convention Property Seat**

**OPEN**

## **Cultural/ Historical Seat**

**Ahmad Ward**

Executive Director, Historic  
Mitchelville Freedom Park

## **Ecotourism Seat**

**Mike Overton**

Founder & CEO  
Outside Brands

## **Entertainment Seat**

**Ryan Larson**

Director of Marketing  
SERG Group

## **Festival & Event Seat**

**Chris Brewer**

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**

Airports Director  
Hilton Head Island Airport/Beaufort  
Executive Airport

## **Town Council**

**Councilman Alex Brown**

Ward 1

## **Town Representatives**

**Angie Stone**

Assistant Town Manager  
Town of Hilton Head Island

## **Andrew Davis**

Marketing & Communications Director  
Town of Hilton Head Island

## **Kelly Spinella**

Marketing & Brand Manager  
Town of Hilton Head Island

# STRATEGY 1

## 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	TACTICS
Develop social, cultural and environmental sustainability initiatives to engage locals and visitors.	<p>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.</p> <p>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.</p> <p>Partner with Coastal Discovery Museum, Outside Foundation, Sea Turtle Patrol, &amp; Office of Cultural Affairs creating in-depth programming to further emphasize the importance of our environment.</p>
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.	<p>Implement annual resident sentiment survey.</p> <p>Present findings to key stakeholders; Town, residents, businesses partners, etc.</p> <p>Benchmark and update resident sentiment results annually.</p>
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.	<p>Host bi-annual community engagement events.</p> <p>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.</p> <p>Designated resident &amp; community communications, outreach and informational meetings.</p> <p>Deployment of annual resident sentiment surveys.</p>
Develop community-wide programs to increase awareness and support of tourism & hospitality as a key economic driver providing growth opportunities for all.	<p>Connect with USCB and develop a Brand Boot Camp program. These could be extensions of the existing Island Ambassador Program or a hybrid program.</p> <p>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.</p> <p>Tourism economy health check -town integration/ cadence 1x per year.</p>
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.	<p>Data management platform examples: Zartico, Simpleview, Keydata.</p> <p>Hiring dedicated headcount to support these new platforms and analytics.</p> <p>Liaise with community counterparts to share insights and promote a data-driven ecosystem for the destination.</p>



## TIMING



LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber		•		15% of local businesses featuring promise seals (all businesses).
Town/Chamber/ Businesses		•		Number of Sustainable Toolkit downloads/engagements.
Chamber		•		Create programs with partners with budget to support.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber	•	•	•	Growth in number of surveys completed YoY.
Chamber	•	•	•	Completion of presentations to stakeholders annually.
Chamber	•	•	•	Monitor YoY increase/ decrease in sentiment and address accordingly.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
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	KPIs
Chamber		•		Development of Brand Boot Camp Program in partnership with USCB.
Chamber			•	10% of island businesses have engaged with the Brand Boot Camp program and are using the Brand Tool Kit.
Chamber/Town	•			Contract deliverable, 1x per year.

LEAD	FY 2024	FY 2025	FY 2026	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.

# STRATEGY 1

## 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.

INITIATIVES	TACTICS
Assist in the awareness of career opportunities and recruitment of talent for all residents and throughout the region.	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.
Assess availability of existing structures and government-owned land to potentially develop workforce housing on/off island.	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.
Work in partnership and enhance industry workforce development initiatives with the public sector, area schools, and industry partners.	Introduce new, formalized internship programs within the Lowcountry that include diverse offerings and hiring opportunities postinternship. 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.
Develop strategic understanding of requirements for hiring senior and strategic talent to support local businesses in their talent search.	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.
Enhance and promote awareness of hospitality and cultural training programs in collaboration with local educational institutions and industry partners.	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	KPIs
Chamber/Town		•		Successful launch of job portal.
Town/Private Partner		•		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	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	KPIs
Beaufort County/ Town/ Chamber		•		Social impressions and engagements
Beaufort County/ Town/ Chamber	•			
Chamber	•			Social impressions and engagements

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/Private Partner/ Chamber		•		Establish base understanding and create a Hilton Head Island senior-level recruitment handbook.
Town/Private Partner/ Chamber		•		Report on comparable towns/cities and their hiring efforts.
Town/Private Partner/ Chamber			•	Report out on partner offerings/ packages in efforts to establish competitive effort for recruitment.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/Town		•		Create and implement program. Establish key metrics for measurement.
Chamber/Town		•		Confirm creation of video and plan to support promotion.

# STRATEGY 1

## 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	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	KPIs
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	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	KPIs
Chamber	•			Completion of shoot Q1 FY23
Chamber	•			Number of locals involved in program/sessions to their content
Chamber		•		Establish an Influencer program: details of campaign, identify talent and budget

# STRATEGY 1

## 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.

INITIATIVES	TACTICS
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.	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).
Evaluate current incentives for investment in new and existing venue capital to compete with other like-size coastal destinations.	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	KPIs
Town/ Chamber		•		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	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	KPIs
Town/Private Partner			•	Support the development/ redevelopment of a 5-star property.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/ Town/ Private Partners	•			Competitive assessment presentation.
Chamber/ Town/ Private Partners	•			Demonstrable influence on infrastructure decisions.
Chamber/ Town/ Private Partners			•	Economic strategy developed.

# STRATEGY 1

## 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



LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Private Sector/ Chamber		•		Scope, budget, implement and report out on an assessment.
Town/ Private Sector/ Chamber			•	Identify top three viable options to bring forward for further review.
Town/ Private Sector/ Chamber			•	Strategy and rollout plan.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/Town/ Palmetto Breeze			•	Marketing campaign launch Campaign impressions and sessions Ridership increase

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Private Sector/ Chamber		•		Engage three rideshare partners.
Town/ Private Sector/ Chamber	•			RFP responses and successful bidding process.
Town/ Private Sector/ Chamber			•	Identification of ways to work alongside rideshare regulations and serve residents and visitors.

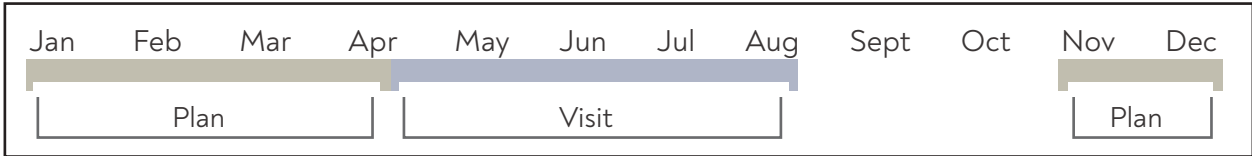


**FAMILY**

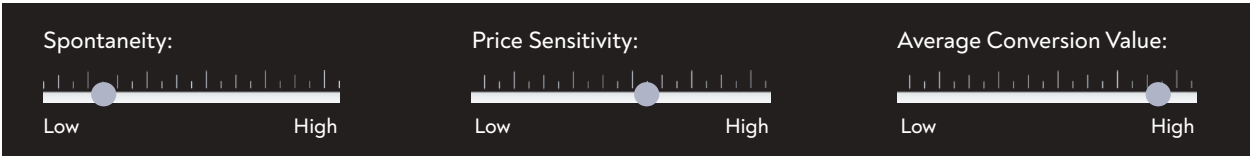


TRAVEL OBJECTIVE

Find a vacation spot that will please everyone during the school holidays.



FAMILY TRAVEL HABITS



WHO THEY ARE

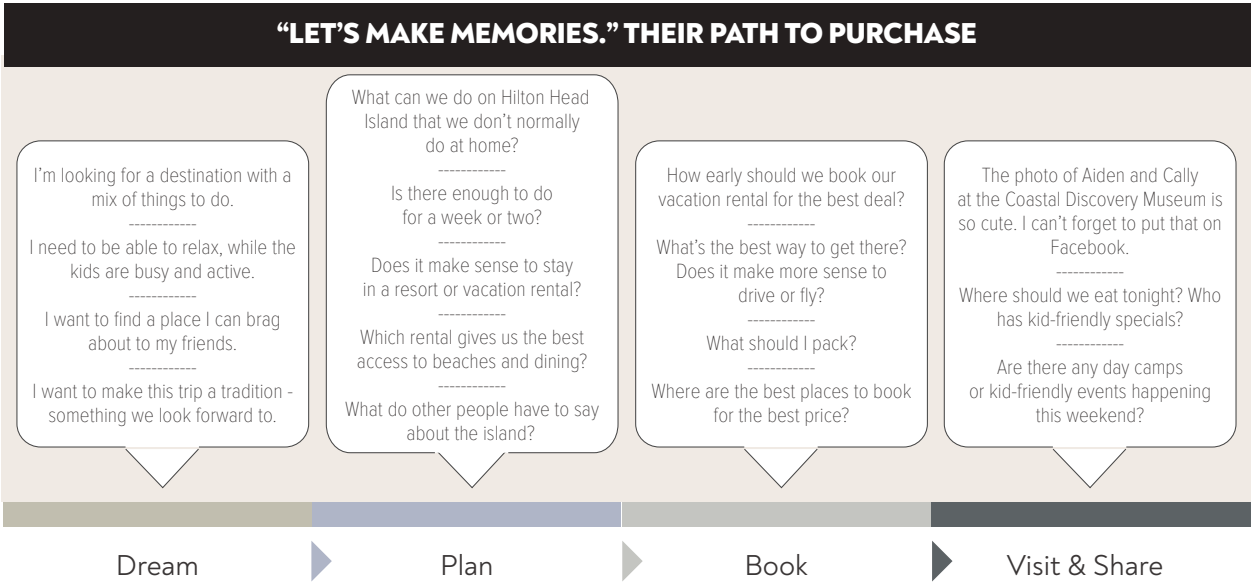
- ★ Upscale & Status Oriented
- 🏠 Values Family Time
- ❤️ Creating a Legacy
- 🍏 Active & Health Conscious

PREFERRED ACTIVITIES & ATTRACTIONS

- Vacation Rentals & Resorts
- Beach & Water Activities
- Biking & Hiking
- Tennis & Pickleball
- Festivals & Events
- Kid-friendly Dining
- Museums & Day Camps

MARKETING CHANNELS & FORMATS

- Facebook Videos
- Instagram
- TripAdvisor
- TV
- Online Video
- Forums & Blogs
- Pinterest



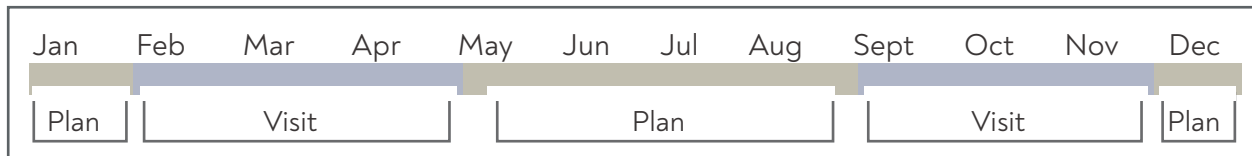


**ARTS, HISTORY & CULTURE**



## TRAVEL OBJECTIVE

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




## ARTS, HISTORY & CULTURE TRAVEL HABITS




## WHO THEY ARE

  
Values  
Learning  
& Authenticity

  
Image  
Conscious

  
Seeking an  
Immersive  
Experience

  
Upscale  
& Status  
Oriented

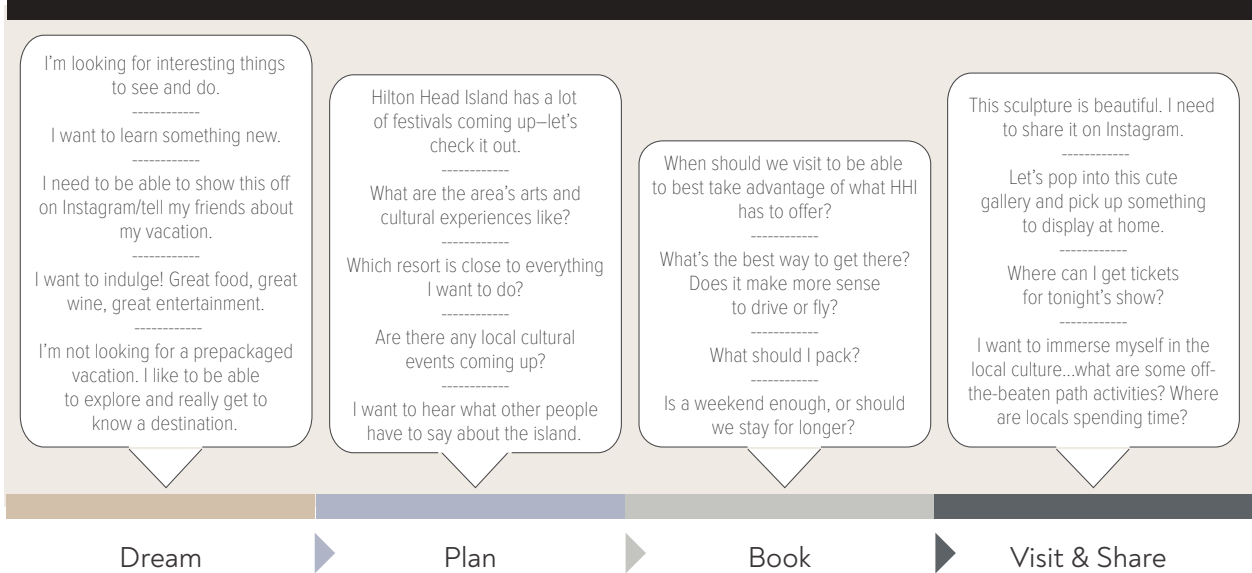
## PREFERRED ACTIVITIES & ATTRACTIONS

Historical Attractions  
Art Galleries  
Local Culture  
Culinary Experiences  
Festivals & Events  
Theater  
Music

## 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



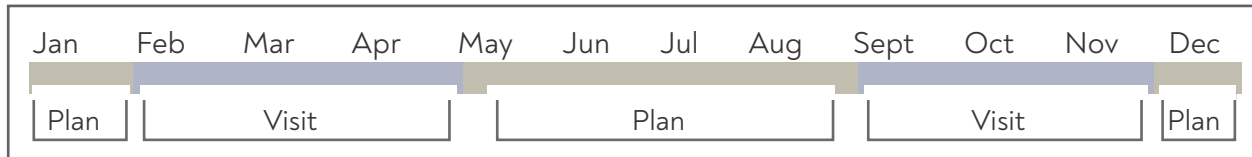


**WELLNESS TRAVELER**



## TRAVEL OBJECTIVE

Find a getaway that will accommodate relaxation and rejuvenation, and allow them to prioritize their healthy lifestyle.



## ARTS, HISTORY & CULTURE TRAVEL HABITS



## WHO THEY ARE



Upscale  
& Status  
Oriented



Active & Health  
Conscious



Enjoys the  
Finer Things



Leisure  
Lovers

## PREFERRED ACTIVITIES & ATTRACTIONS

Vacation Rentals & Resorts  
Golf  
Tennis & Pickleball  
Biking  
Spas

## MARKETING CHANNELS & FORMATS

Facebook  
Instagram  
Forums & Blogs  
TripAdvisor  
Pinterest

## “EXPERIENCES ARE GREATER THAN THINGS.” THEIR PATH TO PURCHASE



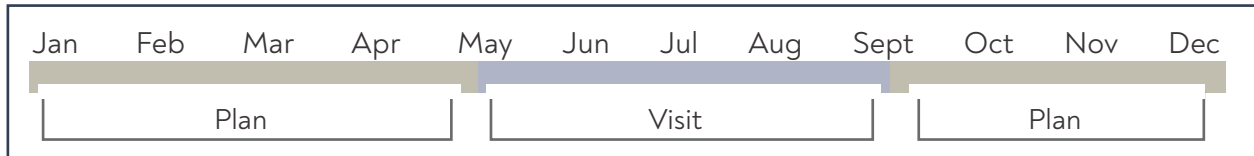


**SPORTS ENTHUSIAST**

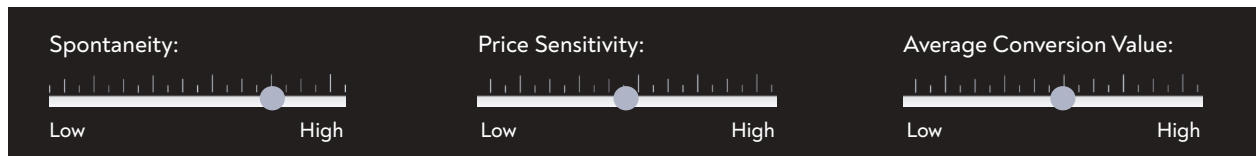


## TRAVEL OBJECTIVE

Find a destination where they can pursue their interests on their downtime.



## SPORTS ENTHUSIAST TRAVEL HABITS



## WHO THEY ARE

  
Sports Fans  
(Golf & Tennis)

  
Leisure  
Lovers

  
Spontaneous  
& Social

  
Active & Health  
Conscious

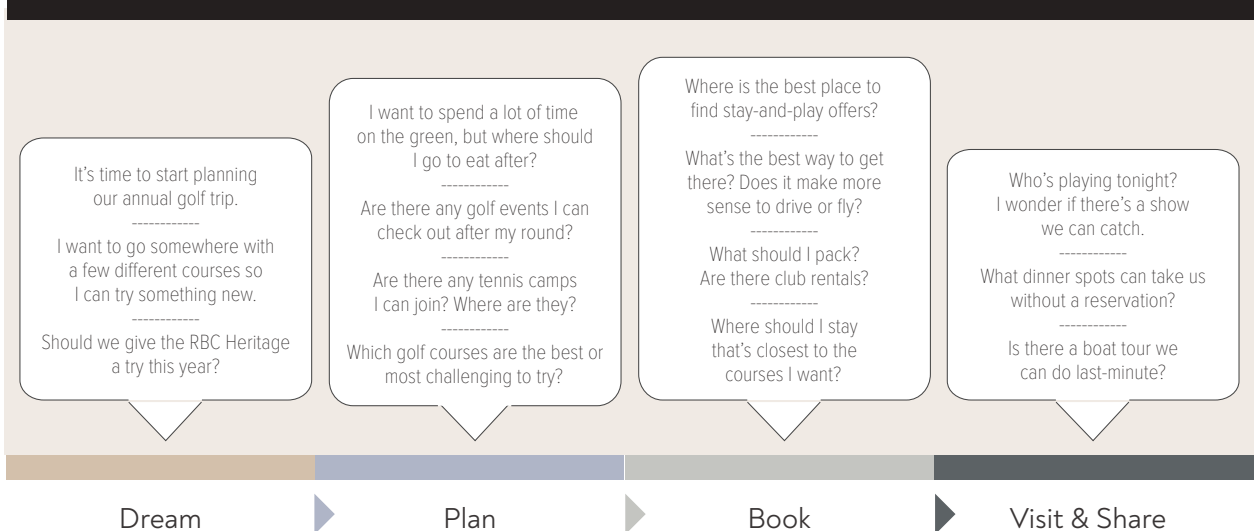
## PREFERRED ACTIVITIES & ATTRACTIONS

Golf  
Tennis & Pickleball  
Boating & Water Activities  
Hiking & Biking  
Nightlife

## MARKETING CHANNELS & FORMATS

Facebook Videos  
Instagram  
Twitter  
TripAdvisor  
TV  
Online Video  
Forums & Blogs

## “LET’S EXPLORE.” THEIR PATH TO PURCHASE



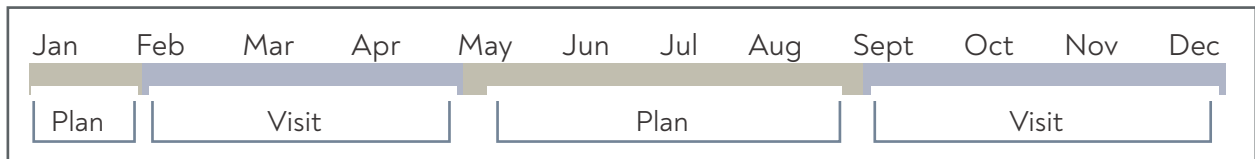


CULINARY



## TRAVEL OBJECTIVE

Be immersed in a new destination (or an old favorite) by exploring the pursuit of unique and memorable culinary experiences.




## CULINARY TRAVEL HABITS



## WHO THEY ARE

  
Values  
Authenticity

  
Seeking an  
Immersive  
Experience

  
Spontaneous  
& Social

  
Unconventional

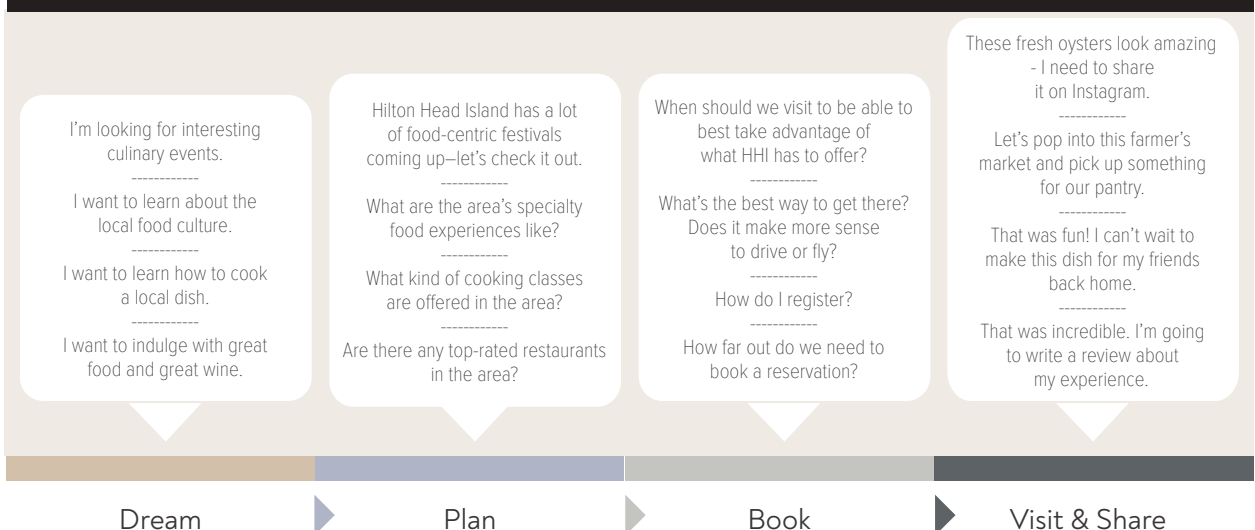
## PREFERRED ACTIVITIES & ATTRACTIONS

Cooking Classes  
Food Tours  
Wine, Beer, and Food Festivals  
Specialty Dining Experiences

## MARKETING CHANNELS & FORMATS

Facebook Videos  
Instagram  
TripAdvisor  
Forums & Blogs  
Pinterest

## “EXPERIENCE AUTHENTIC, LOCAL CUISINE.” THEIR PATH TO PURCHASE





**SNOWBIRDS**



TRAVEL OBJECTIVE

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



SNOWBIRD TRAVEL HABITS



WHO THEY ARE

Traditional

Values  
Family Time

Enjoys the  
Finer Things

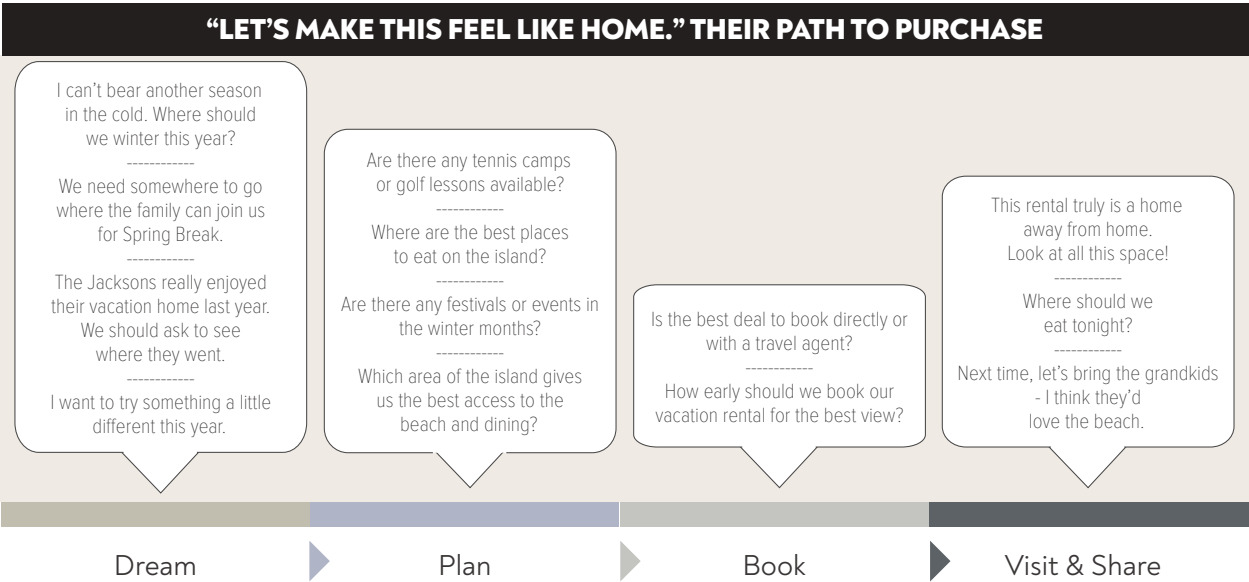
Active & Health  
Conscious

PREFERRED ACTIVITIES & ATTRACTIONS

- Vacation Rentals & Resorts
- Dining
- Golfing
- Tennis & Pickleball
- Biking

MARKETING CHANNELS & FORMATS

- Facebook
- Print
- TripAdvisor
- Radio
- TV
- Online Video





**THE WEEKENDERS**



TRAVEL OBJECTIVE

Find a fairweather weekend escape from work and city life.



THE WEEKENDERS TRAVEL HABITS



WHO THEY ARE

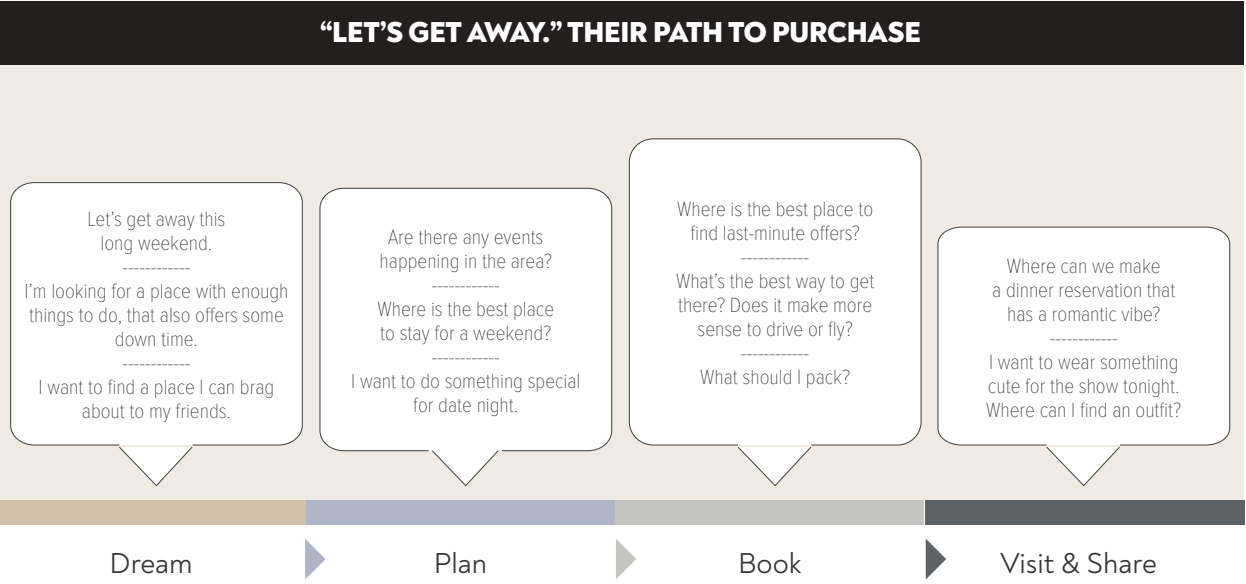
- ★ Upscale & Status Oriented
- 🏙 Urban Dwellers
- 💬 Spontaneous & Social

PREFERRED ACTIVITIES & ATTRACTIONS

- Vacation Rentals & Resorts
- Beach & Water Activities
- Dining & Shopping
- Romantic Things to Do
- Festivals & Events
- Weddings

MARKETING CHANNELS & FORMATS

- Facebook Videos
- Instagram
- TripAdvisor
- TV
- Online Video
- Forums & Blogs
- Pinterest



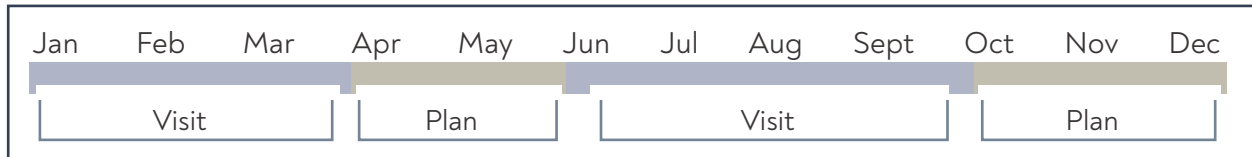


**INTERNATIONAL VISITORS**

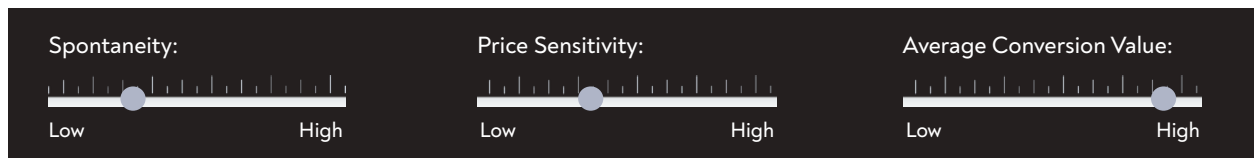


## TRAVEL OBJECTIVE

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.



## INTERNATIONAL TRAVEL HABITS



## WHO THEY ARE



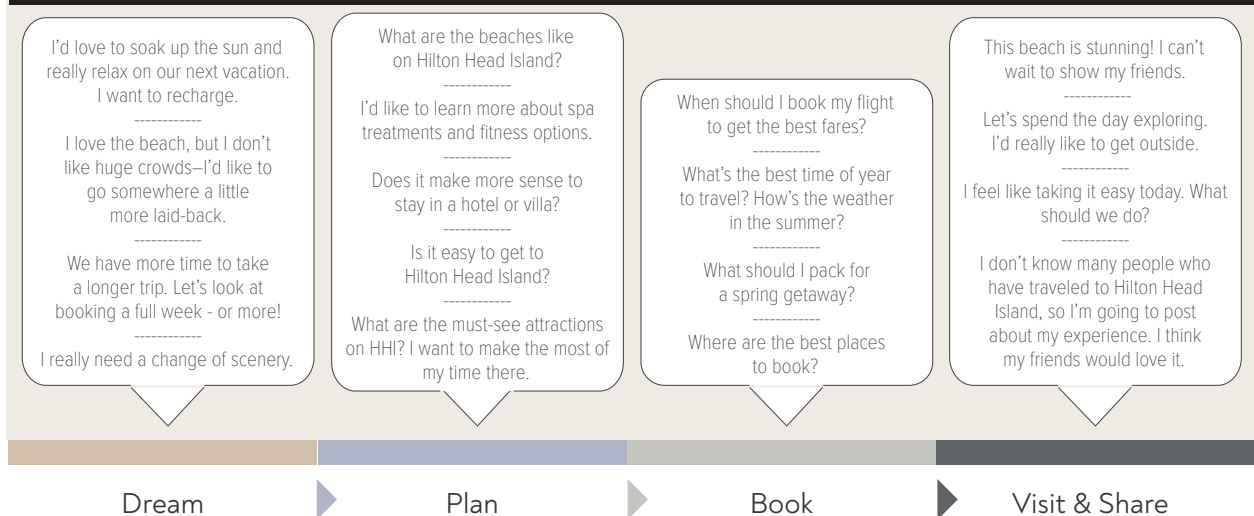
## PREFERRED ACTIVITIES & ATTRACTIONS

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



**MMGY INTELLIGENCE**

Community Sentiment Survey Executive Summary, Wave 3





HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE

# Community PERSPECTIVES™

WAVE 3 RESIDENT SENTIMENT STUDY | 2023



# Survey METHODOLOGY



## Survey Methodology

- MMGY Travel Intelligence conducted an online survey of 2,830 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 28, 2023 – September 17, 2023. 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.

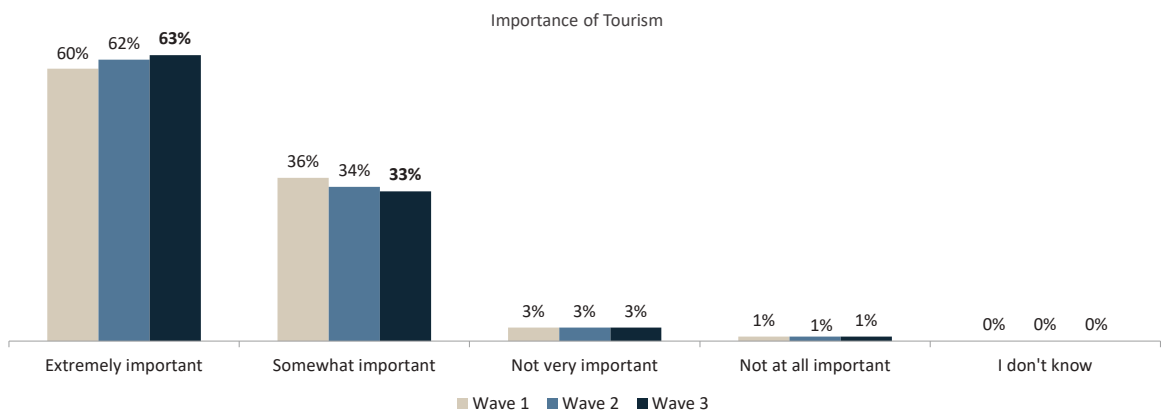


## Key INSIGHT #1

Perceptions of the importance of tourism are up slightly from Wave 1 and fewer residents indicate it has a negative impact on their lives. While the majority of residents continue to feel that Summer is too crowded, fewer feel that each season is too crowded compared to Wave 1.



63% of residents believe tourism is extremely important to the local economy.



Key Insight #1

- 5 -

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



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%	60%	59%	61%
Somewhat important	27%	36%	36%	34%
Not very important	2%	3%	4%	4%
Not at all important	0%	1%	1%	1%
I don't know	0%	0%	0%	0%

Key Insight #1

- 6 -

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

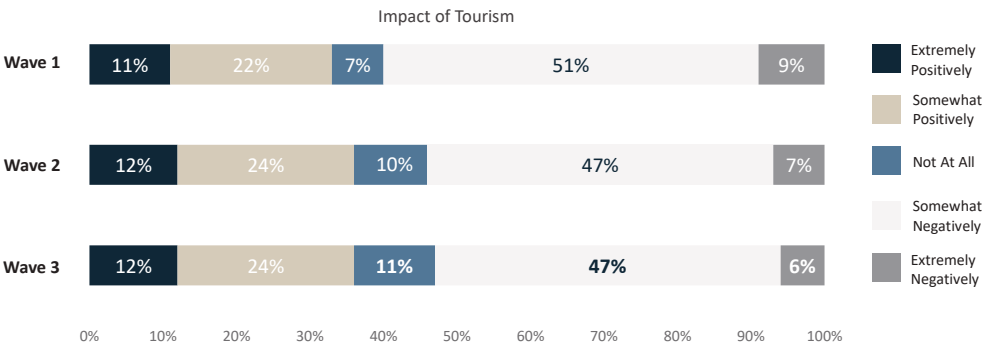


Those who work off-island are more likely to find tourism to be extremely important to the Hilton Head Island economy than those who are retired or currently work on Hilton Head Island.

By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely important	63%	71%	62%
Somewhat important	33%	26%	35%
Not very important	3%	3%	3%
Not at all important	1%	0%	1%
I don't know	0%	0%	0%

Key Insight #1

Compared to Wave 1, fewer residents feel tourism impacts them negatively.



Key Insight #1



**Those who have lived here longer are more likely to feel that tourism impacts 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	15%	9%	9%	13%
Somewhat positively	28%	24%	21%	23%
Not at all	14%	9%	11%	8%
Somewhat negatively	41%	52%	52%	48%
Extremely negatively	3%	6%	7%	9%

Key Insight #1

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



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

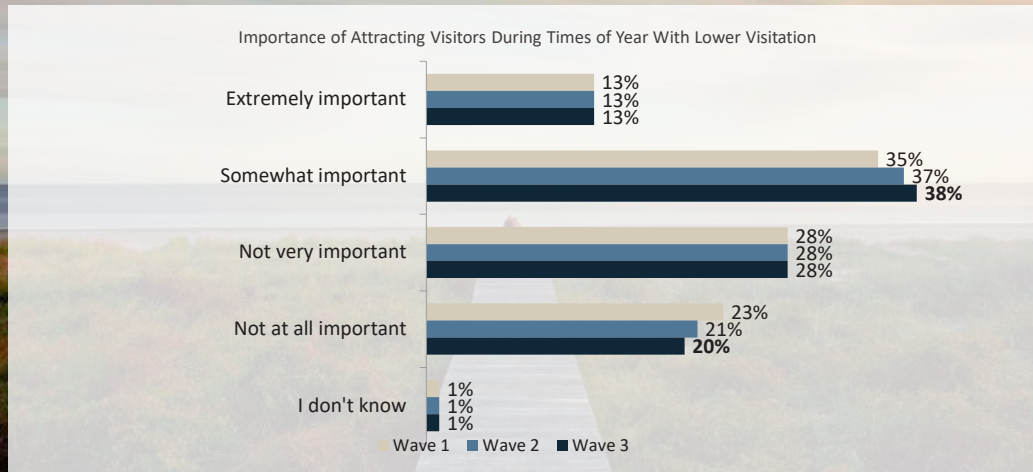
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely positively	16%	17%	9%
Somewhat positively	25%	27%	24%
Not at all	8%	14%	11%
Somewhat negatively	43%	39%	51%
Extremely negatively	8%	3%	6%

Key Insight #1

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

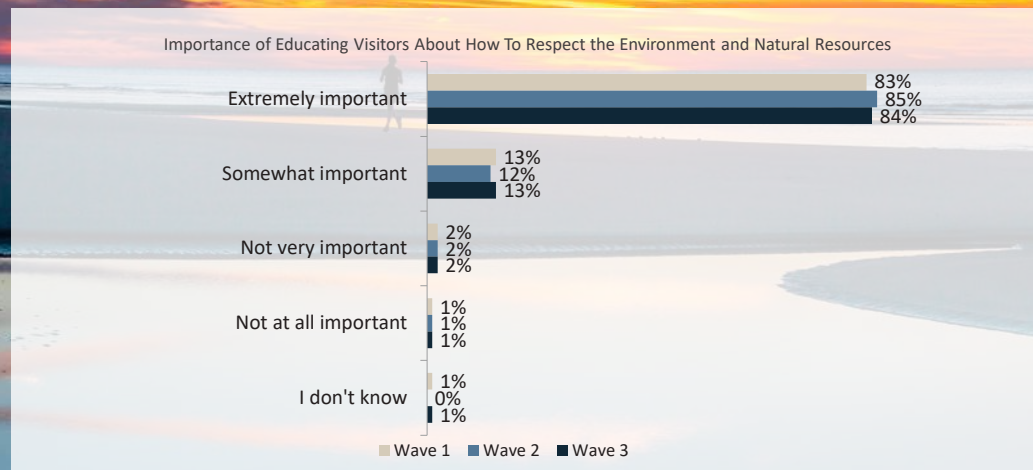


## Half of residents believe that it is important to attract visitors during times of the year with lower visitation, up slightly from Wave 1.



**Question:** Please indicate how important you believe it is to attract visitors to Hilton Head Island during times of the year that usually have lower visitation (October – March)?

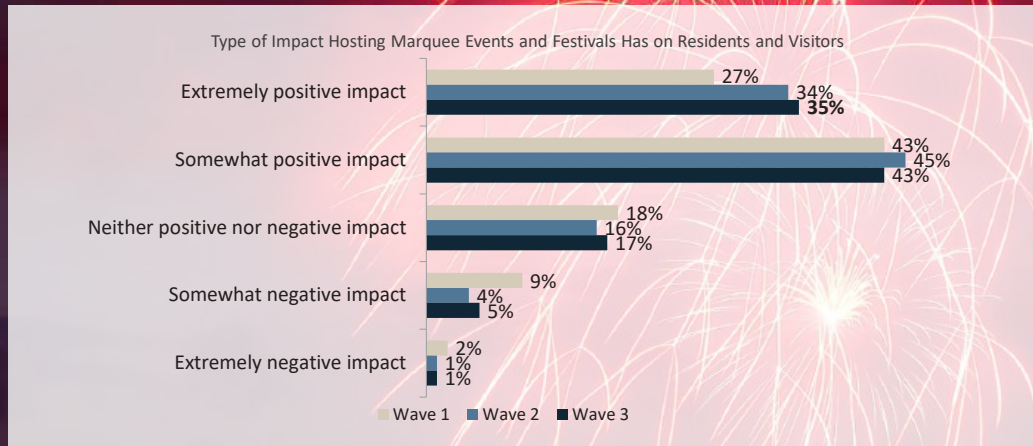
## Nearly all residents believe it is important to educate visitors about how to respect the environment and natural resources when they visit, unchanged from previous waves.



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



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



Key Insight #1

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

**Compared to Wave 1, significantly more residents support efforts to fund art and cultural attractions, to promote attractions and festivals on Hilton Head Island, and in branding and marketing Hilton Head Island for tourism.**

	Wave 1	Wave 2	Wave 3
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in educating visitors about how to be responsible in protecting and preserving our natural resources when visiting Hilton Head Island	87%	87%	87%
I support efforts by our town in the funding and installation of local public art, exhibits, and cultural attractions	67%	70%	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%	67%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in branding and marketing Hilton Head Island for tourism	47%	51%	50%

Key Insight #1

**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
- Supports local business creation
- Generates tax revenues for state, county and local governments.
- Supports existing small businesses throughout the year
- Helps create a positive ambiance/vibe in the local community
- Is an important factor in making our community a great place to live
- Helps to offset the costs for public safety personnel, streets/roads, schools
- Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)
- Covers the cost of beach renourishment
- Increases real estate values

**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

Key Insight #2



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

▲ Indicates a significant difference from Wave 2. For these positive statements, a green, up arrow indicates a more **positive perception** (more people agree).

▼ Indicates a significant difference from Wave 2. For these positive statements, a red, down arrow indicates a more **negative perception** (more people disagree).

Positive Statements (% Agree) – Top 6	Wave 1	Wave 2	Wave 3
Generates tax revenues for state, county and local governments	76%	80%	81% ▲
Creates jobs for area residents	71%	73%	74% ▲
Provides restaurants that local residents can also enjoy	63%	68%	71% ▲
Supports local business creation	64%	68%	69% ▲
Increases real estate values	64%	66%	67% ▲
Provides amenities and attractions that local residents can also enjoy	56%	62%	64% ▲

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



Key Insight #2

# Compared to Wave 1, significantly more residents agree with the least agreed upon positive statements.

▲ Indicates a significant difference from Wave 2. For these positive statements, a green, up arrow indicates a more **positive perception** (more people agree).

▼ Indicates a significant difference from Wave 2. 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	Wave 3
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55%	56% ▲
Covers the cost of beach renourishment	50%	53%	54% ▲
Is an important factor in making our community a great place to live	39%	45%	46% ▲
Helps create a positive ambiance/vibe in the local community	33%	37%	38% ▲

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



Key Insight #2

# Compared to Wave 1, significantly more residents feel that tourism causes prices to rise while fewer residents agree with the remaining negative statements.

▲ Indicates a significant difference from Wave 2. For these negative statements, a red, up arrow indicates a more negative perception (more people agree). ▼ Indicates a significant difference from Wave 2. For these negative statements, a green, down arrow indicates a more positive perception (more people disagree).

Negative Statements (% Agree)	Wave 1	Wave 2	Wave 3
Creates traffic congestion problems for residents	86%	82%	82% ▼
Brings too many people to Hilton Head Island	65%	59%	58% ▼
Causes local restaurant & entertainment prices to rise	49%	52%	58% ▲
Negatively impacts our natural resources	61%	57%	57% ▼

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



Key Insight #2

## Tourism on Hilton Head Island...

All Statements (% Agree)	Wave 1	Wave 2	Wave 3
Creates traffic congestion problems for residents	86%	82%	82%
Generates tax revenues for state, county and local governments	76%	80%	81%
Creates jobs for area residents	71%	73%	74%
Provides restaurants that local residents can also enjoy	63%	68%	71%
Supports local business creation	64%	68%	69%
Increases real estate values	64%	66%	67%
Provides amenities and attractions that local residents can also enjoy	56%	62%	64%
Helps to offset the costs for public safety personnel, streets/roads, schools	53%	58%	61%
Supports existing small businesses throughout the year	56%	59%	60%
Brings too many people to Hilton Head Island	65%	59%	58%
Causes local restaurant & entertainment prices to rise	49%	52%	58%
Negatively impacts our natural resources	61%	57%	57%
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55%	56%
Covers the cost of beach renourishment	50%	53%	54%
Is an important factor in making our community a great place to live	39%	45%	46%
Helps create a positive ambiance/vibe in the local community	33%	37%	38%

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



Key Insight #2

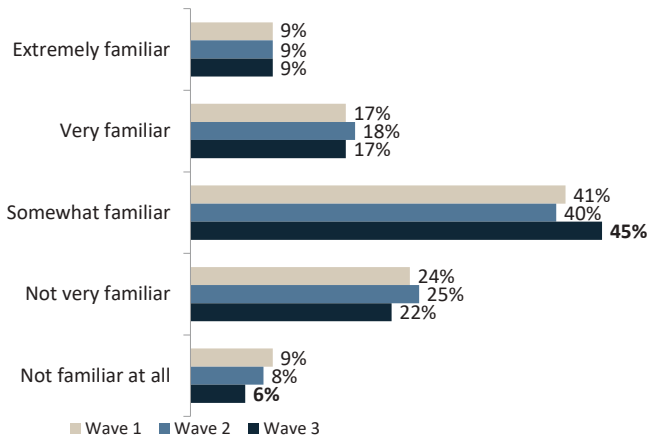


# Key INSIGHT #3

Familiarity with the Hilton Head Island-Bluffton Chamber of Commerce is relatively unchanged from Wave 1. The Chamber continues to be one of the top sources of information residents suggest to their visitors.

## Familiarity with the Hilton Head Island-Bluffton Chamber of Commerce is relatively unchanged from previous waves.

Familiarity with the Hilton Head Island-Bluffton Chamber of Commerce



Key Insight #3

/ **Question:** To what extent, if at all, are you familiar with the Hilton Head Island-Bluffton Chamber of Commerce, the local organization responsible for marketing tourism for Hilton Head Island?



**74%**  
Wave 3

Funding Source	Wave 1	Wave 2	Wave 3
Accommodations tax dollars collected from hotel and home & villa guests	63%	58%	58%
Hospitality tax	57%	54%	54%
Local sales tax	31%	34%	31%
Resident taxes	24%	23%	23%
Private funding	20%	20%	20%
State funding	17%	17%	15%
Other	3%	4%	3%



**34%**  
Wave 3

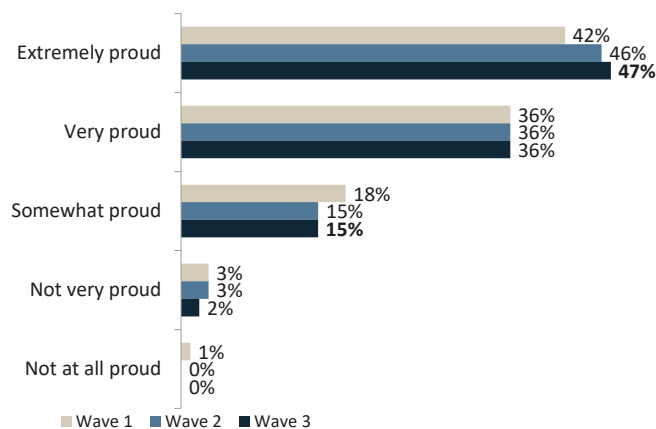




## Key INSIGHT #4

Pride in residency is up from Wave 1 while and perceptions of safety are down slightly. Perceptions of the airports, outdoor public spaces, community parks, shopping, road quality, sports facilities and museum/cultural attractions increased from Wave 1, as well as culinary experiences such as breweries/wineries/distilleries, food trucks, and walk-up stands.

**83 percent of residents are proud to be residents of Hilton Head Island, up from Wave 1.**



Key Insight #4

- 27 -

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

**MM**  
**GY** Travel  
Intelligence

Those who have lived here less than 5 years are more likely to be extremely proud in their residency 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 proud	56%	42%	39%	46%
Very proud	34%	37%	40%	34%
Somewhat proud	8%	19%	17%	17%
Not very proud	1%	2%	4%	2%
Not at all proud	1%	1%	0%	1%

Key Insight #4

- 28 -

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



Those who work off-island are more likely to be extremely proud in their residency than retirees and those who work on-island.

By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely proud	47%	57%	44%
Very proud	35%	32%	38%
Somewhat proud	15%	10%	16%
Not very proud	3%	1%	2%
Not at all proud	0%	0%	1%

Key Insight #4

- 29 -

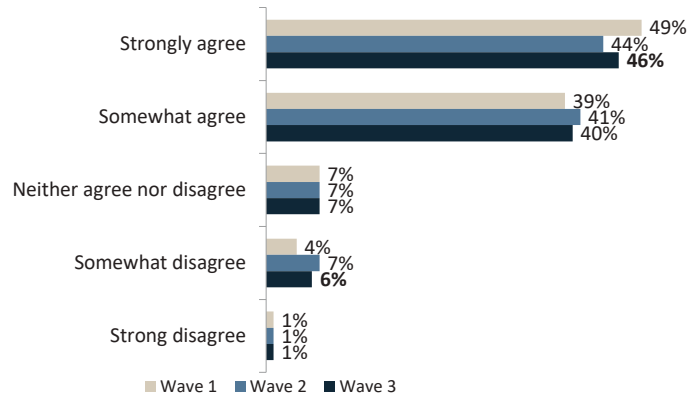
/ **Question:** Please indicate the level of pride you feel in being a resident of Hilton Head Island.





## 86 percent of residents believe Hilton Head Island is a safe place to live, down slightly from Wave 1.

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



Key Insight #4

- 30 -

/ **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	Wave 3
Beaches	91%	92%	92%
Golf courses	91%	91%	92%
Leisure pathways and bike trails	86%	86%	87%
Outdoor/nature activities	80%	82%	82%
Savannah/Hilton Head International Airport	79%	80%	82%
Outdoor public spaces for festivals and events	69%	77%	81%
Water sports/activities	77%	79%	79%
Community parks	70%	77%	78%
Surface street bike paths	70%	70%	72%
Hilton Head Island Airport	55%	57%	58%
Retail shopping	49%	54%	52%
Road quality	42%	44%	51%
Playing fields for sports leagues, tournaments and competitions	44%	48%	50%
Museums/Cultural attractions	38%	43%	47%
Public pools/aquatic centers	27%	32%	31%
Indoor facilities for sports leagues, tournaments and competitions	18%	22%	23%

- The highest perceived Hilton Head Island experiences continue to be its beaches, golf courses, and leisure pathways and bike trails.
- Compared to Wave 1, significantly more residents perceive the following Hilton Head Island experiences to be good quality:
  - Savannah/Hilton Head International Airport
  - Outdoor public spaces
  - Community parks
  - Hilton Head Island Airport
  - Retail shopping
  - Road quality
  - Playing fields
  - Museums/cultural attractions
  - Public pools
  - Indoor sports facilities

Key Insight #4

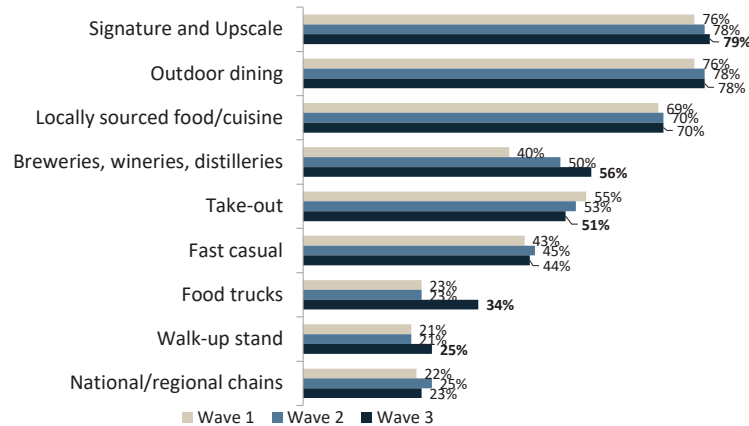
- 31 -

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



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

Dining Options in Hilton Head Island Perceived To Be High Quality



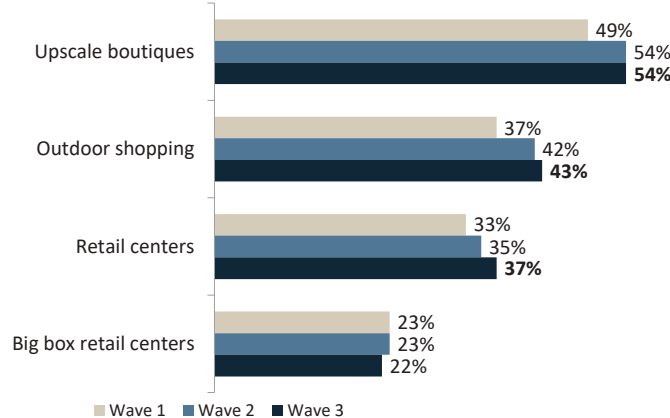
**Question:** Please indicate your perception of the quality of each of the following categories of dining and restaurant options on Hilton Head Island.



Key Insight #4

## After displaying increases in Wave 2, we're seeing a similar percentage of residents reporting that they believe Hilton Head Island to have high quality upscale boutiques and outdoor shopping.

Shopping Options in Hilton Head Island Perceived To Be High Quality



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



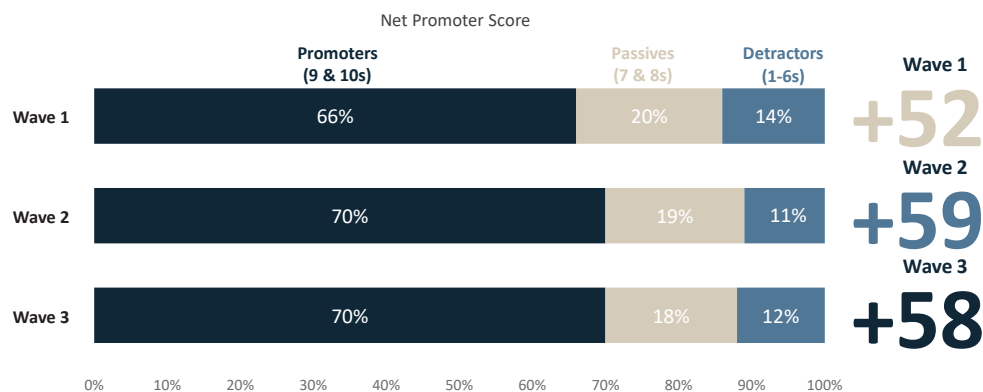
Key Insight #4



# Key INSIGHT #5

The Net Promoter Score of residents is up from Wave 1 and slightly more consider themselves passionate advocates. The most cited positive and negative aspects of tourism were similar to those reported in previous waves with economic benefits and amenities cited as positive impacts and overcrowding, overdevelopment, and the quality of the current visitor cited most frequently as negative aspects.

Residents report a higher Net Promoter Score for Hilton Head Island than they did in Wave 1.



/ **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)	79%	69%	67%	63%
Passives (7+8s)	15%	19%	20%	20%
Detractors (1-6s)	6%	12%	13%	17%
NPS	<b>+73</b>	<b>+57</b>	<b>+54</b>	<b>+46</b>

Key Insight #5

**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?



- 36 -

**Net Promoter Scores are higher for those who work off-island 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)	65%	82%	69%
Passives (7+8s)	21%	11%	19%
Detractors (1-6s)	14%	7%	12%
NPS	<b>+51</b>	<b>+71</b>	<b>+57</b>

Key Insight #5

**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?



- 37 -

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

**83%**  
Wave 3

of residents consider themselves passionate advocates for Hilton Head Island. Compared to 81% in Wave 1 and 82% in Wave 2.



Key Insight #5

/ **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?

- 38 -

MMGY Travel Intelligence

## Positive Aspects to Tourism on Hilton Head Island

The positive aspects of tourism cited by residents are similar to responses reported last wave.

### Economic Benefits

The most cited responses were related to the revenue tourism brings into Hilton Head Island. Many residents recognize that this revenue reduces their taxes, supports local businesses, and supports the amenities they enjoy year-round. Tourism also increases their property values and employs many residents.

### Amenities

Residents frequently mentioned the golf courses, restaurants, bike paths, and shopping they get to enjoy year-round are made possible by tourism. They also know that tourism revenue funds beach renourishment and festivals and events on Hilton Head Island.

### Positive Atmosphere

Some residents cited the positive atmosphere tourism creates by attracting interesting and diverse visitors. They also feel positively about the generations of families who visit year after year and eventually become residents themselves.

Key Insight #5

MMGY Travel Intelligence



# Negative Aspects to Tourism on Hilton Head Island

### Overcrowding

The most cited negative aspects of tourism relate to overcrowding, congestion, and traffic. Residents feel that the infrastructure on the island can not keep up with the number of tourists. They cite lack of parking, traffic on the bridge, and the inability to go to restaurants during the Summer.

### Overdevelopment

Residents also cited overdevelopment as a negative aspect of tourism. They feel that the natural aspects of the Island are being destroyed in order to accommodate more tourists. They worry about becoming too commercialized like Myrtle Beach rather than keeping the charm and natural focus that Hilton Head Island has always been known for.

### Quality of Visitor

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

### Rising Prices

Residents also cited the rising prices as a negative aspect of tourism, specifically in restaurants and stores. Many are also concerned about the lack of affordable housing for residents and Island workers which results in more traffic and a shortage of service industry workers to accommodate the number of visitors.



Key Insight #5

# Top Concerns Facing The Community

	Wave 2	Wave 3
Workforce shortage	48%	44%
278 Corridor project	38%	39%
On-island workforce housing	36%	35%
Overall development	29%	34%
Environmental/open spaces protection	26%	27%
General infrastructure needs (e.g. water/sewer, roads, other utilities)	20%	18%
Short-term rental noise and parking	16%	18%
South-end traffic	16%	17%
Repurposing/modernizing Island commercial buildings	14%	14%
Mid-Island initiative and redevelopment (Northridge Plaza, Port Royal Plaza, Mid-Island Park)	12%	12%
North-island traffic	11%	12%
Bike safety	9%	7%
Arts and development of cultural assets (e.g. Mitchelville Freedom Park)	4%	4%
Other	9%	10%
None of the above	0%	1%

- The top concerns residents feel are facing their community are the workforce shortage, the 278 Corridor project, on-island workforce housing, and overall development. Compared to Wave 2, fewer residents are concerned about the workforce shortage, infrastructure needs, and bike safety, while more are concerned about overall development, and short-term rental noise and parking.

Key Insight #5

This question was not asked in Wave 1 so comparisons have been made to Wave 2.  
 / **Question:** What are your top three concerns facing our community?



## What can Hilton Head Island do to make the town more attractive?

Host more arts, festivals and cultural events.

Stay true to its character.

Bring in more dining and shopping options.

Continue preservation and protection efforts.

Provide more workforce housing.

Continue to develop family-friendly offerings.

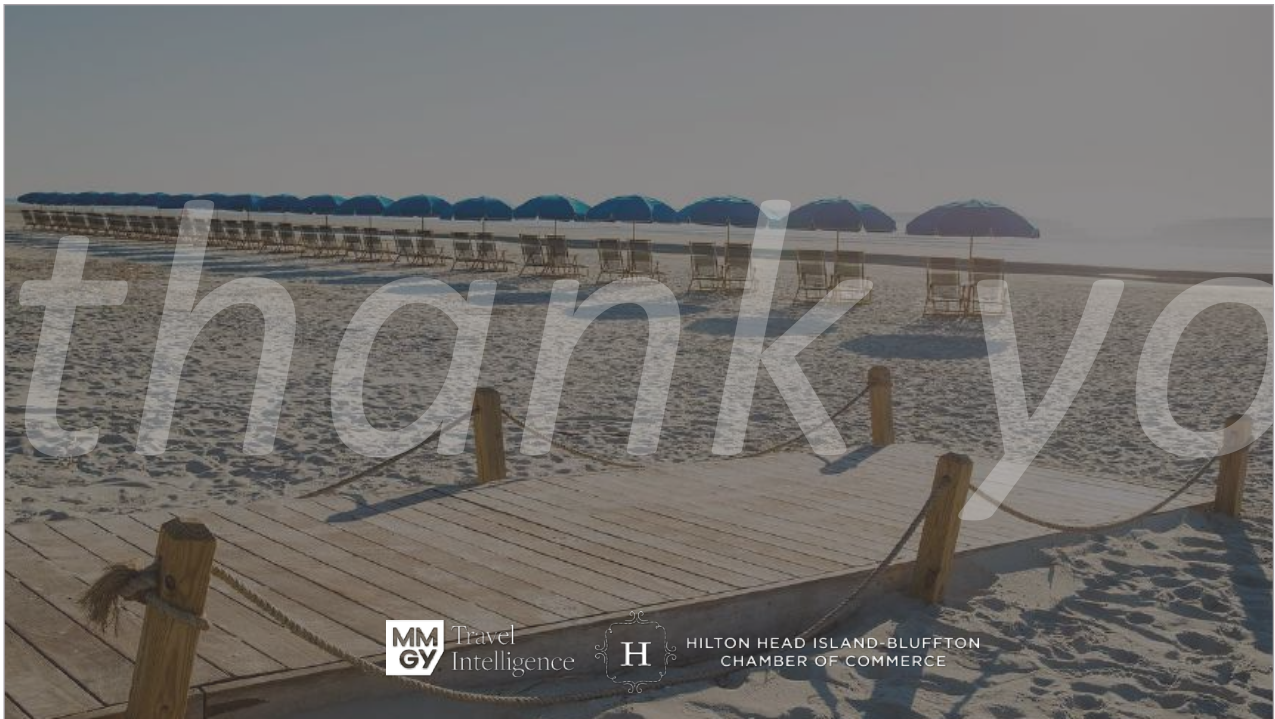
Modernize the airport and offer more direct flights.

Have stricter controls on rental properties.

Ease traffic flow.

Advertise to a higher income traveler.

Key Insight #5



**OFFICE OF TOURISM ANALYSIS,  
COLLEGE OF CHARLESTON**

2023 Visitor Profile Study





# Hilton Head Island Visitor Profile Survey

2023

Melinda Patience  
Mark Witte, Ph.D.



HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE



COLLEGE of  
CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

PREPARED FOR:  
HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE

BY:  
OFFICE OF TOURISM ANALYSIS  
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## EXECUTIVE SUMMARY

### SAMPLE DEMOGRAPHICS

Millennials represented 61% of the respondents, followed by Gen X (17.7%), and then Baby Boomers (17.9%). Over 56% 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, nearly 90% of the respondents were married.

### POINT OF ORIGIN

The respondents resided in 140 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from east to west coast. More respondents resided in California than any other state (13.0%). Second was Texas (7.8%), followed then by Pennsylvania (7.1%), New York (6.5%), Ohio (5.5%), and Georgia (5.1%). In-state visitors did not make up a significantly large portion of the respondents (4.8%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: Los Angeles-Long Beach-Anaheim, CA; New York-Newark-Jersey City, NY-NJ; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; San Francisco-Oakland-Fremont, CA; Washington-Arlington-Alexandria, DC-VA-MD-WV; and Chicago-Naperville-Elgin, IL-IN.

Canada was the top international origin market amongst respondents (38.0%), followed by the Middle East (26.8%), and Europe (16.9%).

### THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (40.7%), relaxation (31.7%), and spending time with family (22.2%), followed by nature-based activities (19.5%), biking (17.4%), culinary experiences (14.3%), and shopping (14.3%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include water excursions, museums, and wellness activities.

Amongst Hilton Head Island's overnight visitors, 70.6% indicated they had visited Hilton Head Island, SC for the first time, suggesting that the destination continues to appeal to new visitors.

**TRIP CHARACTERISTICS**

The average group size of those surveyed was 4.7 for overnight visitors and 5.3 for day trip visitors. While the main mode of transportation around the island continues to be personal/family car (31.7%), transportation to the saw significant increase in flying into the destination from the prior survey (36.9% to 52.8%), with the majority of visitors flying into Hilton Head Island Airport.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 8.1 nights, hotel visitors stayed 6.5 nights, timeshare visitors stayed 8.0 nights, and second homeowners stayed 9.7 nights. The overall average was 6.9 nights.

Resorts stood out as the most popular choice of paid accommodation for overnight visitors (56.1%), followed by home/villa rentals (15.6%), hotels (13.7%), timeshares (6.1%), and second homes (3.0%).

**TRAVEL PLANNING**

VRBO remains by far the most popular online booking platform for villas/homes (32.2%), followed by local vacation rental companies (22.2%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (10.8%). The percentage of respondents booking via Airbnb remains steady year-to-year at around 11%.

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

Top reasons for choosing to visit Hilton Head Island were beach destination (32.6%), wanting to visit nature-based attractions (23.4%), previous visitation (20.4%), wanting to visit heritage attractions (18.2%), and word-of-mouth/recommendation (12.2%).

Of those visitors surveyed, 80.2% 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=169), 33.7% had never visited the Hilton Head Island / Bluffton area before, and 50.3% had visited one to five times before.

Of those non-visitors, 47.0% traveled elsewhere, 26.0% plan to visit in the future, 4.0% were hesitant because of unpredictable weather events, 3.0% mentioned health reasons, 2.0% did not find what they were looking for, and 2.0% did not travel at all. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (42.0%) and South (27.0%) were the most popular. Nonetheless, 48.8% 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 (50.6%) take two to four leisure/vacation trips per year, and they are most likely to travel between May and October. The top five most appealing experiences for leisure trips/vacations were: relaxation & rejuvenation (72.2%), beaches (71.2%), passive outdoor adventures (63.7%), historic attractions (0.9%), and romantic couple getaways (60.8%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (76.9%), quality of dining options (74.6%), ease of access (73.3%), affordability (73.0%), quality of lodging options (72.6%), diversity of dining options (70.4%), and diversity of lodging options (65.9%).



### 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](http://www.hiltonheadisland.org) or [www.visitbluffton.org](http://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 (%)
<b>Villa/Home Rentals</b>	962,686	951,126	-1.2%
<b>Hotels/Resorts</b>	508,977	497,574	-2.2%
<b>Timeshares</b>	481,934	481,461	-0.1%
<b>Second Homeowners</b>	719,302	710,673	-1.2%
<b>Non-paying Guests</b>	186,667	184,428	-1.2%
<b>Day trippers</b>	267,290	264,083	-1.2%
<b>Total Visitors</b>	<b>3,126,856</b>	<b>3,089,346</b>	<b>-1.2%</b>

Table 1: Visitor Estimates for 2021 and 2022





**SURVEY FINDINGS****SAMPLE DEMOGRAPHICS**

	2019	2021	2022	2023
<b>Gender</b>				
Female	67.4%	62.5%	48.8%	54.1%
Male	32.6%	37.4%	51.1%	45.7%
Self-identify	-	0.1%	-	0.3%
<b>Marital Status</b>				
Married	76.7%	76.7%	77.3%	86.4%
Single	8.5%	9.2%	9.9%	6.7%
Divorced	7.4%	7.7%	5.8%	3.4%
Living as Married	3.8%	-	-	-
Widowed	3.1%	5.3%	5.9%	2.8%
Separated	0.5%	1.1%	1.1%	0.7%
<b>Education (highest level completed)</b>				
Grade School	0.2%	0.7%	0.4%	0.9%
High School	8.0%	8.0%	6.5%	3.8%
Some College	19.6%	20.9%	21.5%	22.6%
Associates Degree (2 years)	13.1%	13.6%	13.2%	16.0%
Bachelor's Degree (4 years)	31.5%	32.9%	32.3%	33.0%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%
<b>Age</b>				
19 years or younger	0.1%	0.1%	0.1%	0.3%
20 to 29 years	0.9%	10.5%	23.8%	24.1%
30 to 39 years	5.9%	16.5%	28.8%	39.4%
40 to 49 years	15.3%	12.6%	13.1%	8.3%
50 to 59 years	26.8%	18.7%	10.9%	9.4%
60 to 69 years	34.4%	25.8%	14.2%	11.6%
70 years and over	15.9%	14.5%	8.6%	6.3%
Not Applicable	0.6%	1.4%	0.3%	0.5%
<b>Household Income</b>				
Under \$24,999	1.4%	2.3%	1.5%	1.1%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%
Not Applicable	18.8%	-	-	-
N	1,682	1,884	1,913	1,154

Table 2: Demographics

## SAMPLE POINT OF ORIGIN

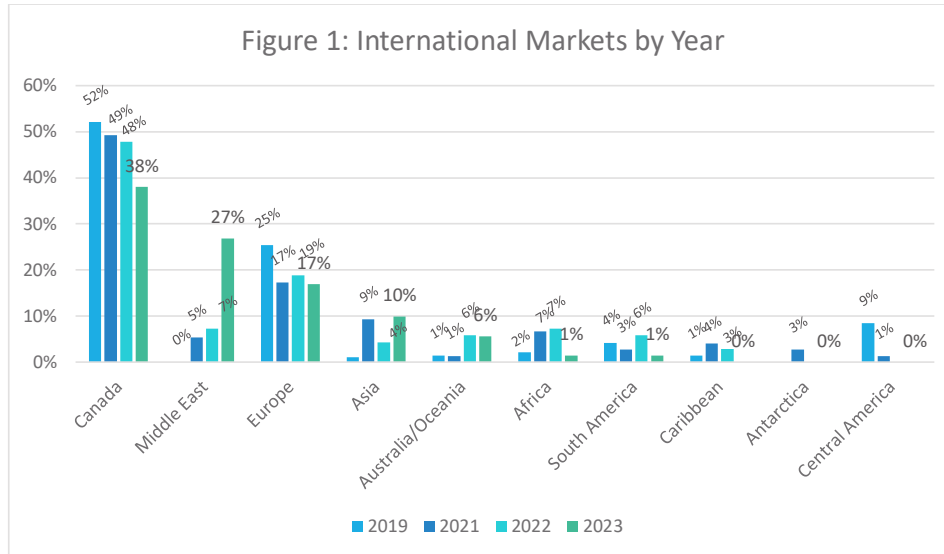
## ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	Los Angeles-Long Beach-Anaheim, CA	106	9.3%
2	New York-Newark-Jersey City, NY-NJ	79	6.9%
3	Atlanta-Sandy Springs-Roswell, GA	44	3.9%
4	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
5	San Francisco-Oakland-Fremont, CA	39	3.4%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
7	Chicago-Naperville-Elgin, IL-IN	34	3.0%
8	Pittsburgh, PA	33	2.9%
9	Charlotte-Concord-Gastonia, NC-SC	23	2.0%
10	Columbus, OH	23	2.0%
11	Detroit-Warren-Dearborn, MI	20	1.8%
12	Charleston-North Charleston, SC	17	1.5%
13	Louisville/Jefferson County, KY-IN	17	1.5%
14	Rural OH	16	1.4%
15	Boston-Cambridge-Newton, MA-NH	15	1.3%
16	Cincinnati, OH-KY-IN	15	1.3%
17	Houston-Pasadena-The Woodlands, TX	15	1.3%
18	Kansas City, MO-KS	15	1.3%
19	Albany-Schenectady-Troy, NY	14	1.2%
20	Baltimore-Columbia-Towson, MD	14	1.2%
21	Austin-Round Rock-San Marcos, TX	13	1.1%
22	Riverside-San Bernardino-Ontario, CA	13	1.1%
23	San Diego-Chula Vista-Carlsbad, CA	13	1.1%
24	Jacksonville, FL	12	1.1%
25	Wisconsin Rapids-Marshfield, WI	12	1.1%
26	Greenville-Anderson-Greer, SC	11	1.0%
27	St. Louis, MO-IL	11	1.0%
28	Akron, OH	10	0.9%
29	Columbia, SC	10	0.9%
30	Rural TX	10	0.9%
	Other	408	35.8%
	Total	1,141	

Table 3: ZIP Code Analysis – Top 30 MSAs



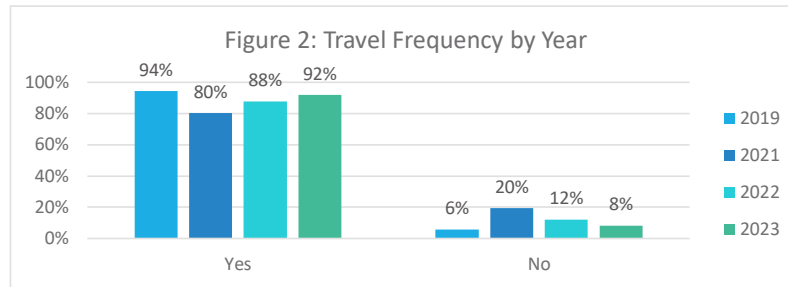
## International Markets



	2019	2021	2022	2023
Canada	52.1%	49.3%	47.8%	38.0%
Middle East	0.0%	5.3%	7.2%	26.8%
Europe	25.4%	17.3%	18.8%	16.9%
Asia	1.0%	9.3%	4.3%	9.9%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%
Africa	2.1%	6.7%	7.2%	1.4%
South America	4.2%	2.7%	5.8%	1.4%
Caribbean	1.4%	4.0%	2.9%	-
Antarctica	-	2.7%	-	-
Central America	8.5%	1.3%	-	-
N	71	75	69	71

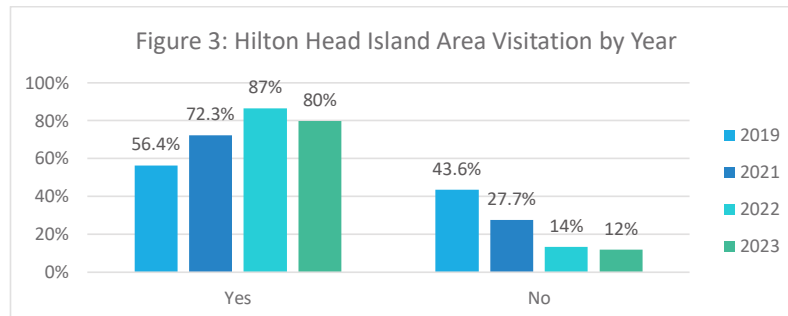
Table 4: International Markets by Year

## TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

Within the last 12 months have you traveled or taken a vacation?<sup>1</sup>

	2019	2021	2022	2023
<b>Yes</b>	94.3%	80.4%	87.8%	91.8%
<b>No</b>	5.7%	19.6%	12.2%	8.2%
<b>N</b>	1,684	2,084	2,918	1,710

TABLE 5: Travel Frequency by Year

Did you visit Hilton Head Island, SC or Bluffton, SC in the last 12 months?<sup>1</sup>

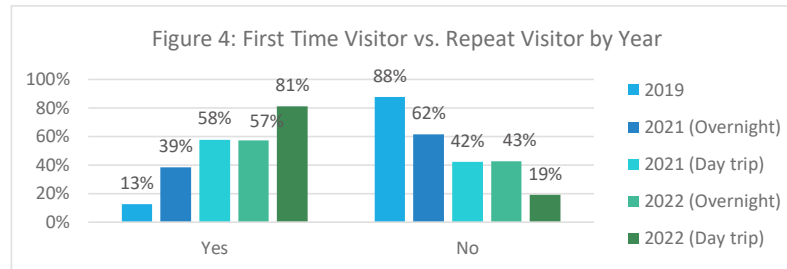
	2019	2021	2022	2023
<b>Yes</b>	56.4%	72.3%	86.5%	79.8%
<b>No</b>	43.6%	27.7%	13.5%	12.0%
<b>N</b>	1,713	1,675	2,547	1,570

TABLE 6: Hilton Head Island Area Visitation by Year

<sup>1</sup> For the 2019 report, these questions asked about the last 18 months instead of the last 12 months. Also, in 2019 the second question was asked of all respondents, whereas in 2021 and 2022 it was just asked of those who had travelled.

## HILTON HEAD ISLAND VISITORS

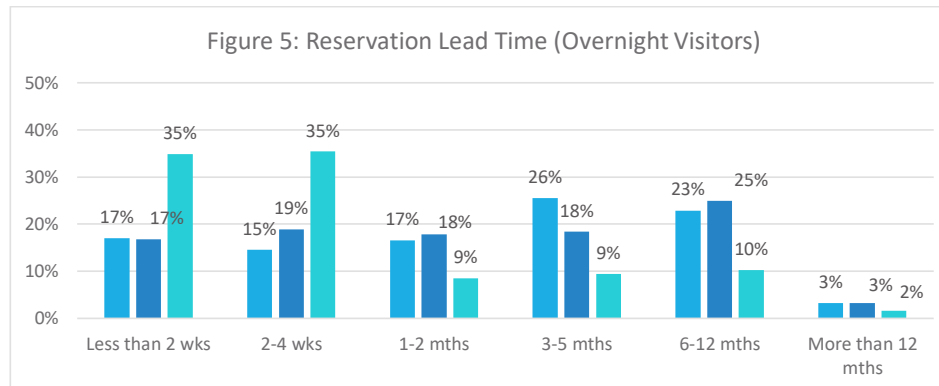
## Was that your first time visiting Hilton Head Island?



	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
<b>Yes</b>	12.5%	38.5%	57.8%	57.4%	81.0%	28.0%	70.6%
<b>No</b>	87.5%	61.5%	42.2%	42.6%	19.0%	72.0%	29.4%
<b>N</b>	946	991	45	1,477	79	1,077	34

TABLE 7: First Time Visitor vs. Repeat Visitor by Year

## Approximately how long before your trip to Hilton Head Island did you make your first reservation (e.g., accommodation, transportation, etc.)?



	2021	2022	2023
<b>Less than 2 weeks</b>	17.0%	16.8%	34.9%
<b>2 weeks to 4 weeks</b>	14.6%	18.9%	35.4%
<b>1 to 2 months</b>	16.6%	17.8%	8.5%
<b>3 to 5 months</b>	25.5%	18.4%	9.4%
<b>6 to 12 months</b>	22.9%	24.9%	10.2%
<b>More than 12 months</b>	3.3%	3.2%	1.6%
<b>N</b>	991	1,479	1,076

TABLE 8: Reservation Lead Time



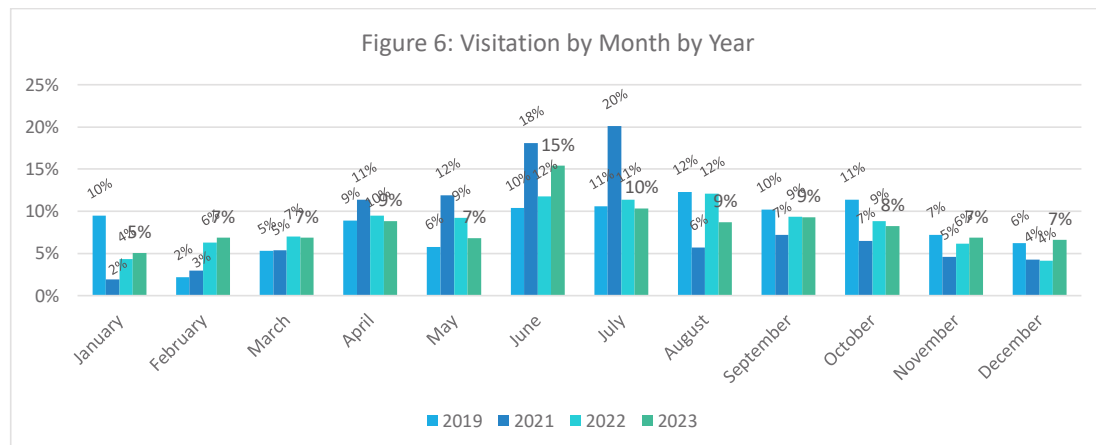
## When did you make your most recent trip to Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
2018	12.9%						
2019	77.8%						
2020	9.3%	14.1%	26.5%				
2021		85.9%	73.5%				
2022				100.0%	100.0%		
2023						100.0%	100.0%
N	951	1,040	34	1,477	79	1,044	33

TABLE 9: Visitation Year by Year

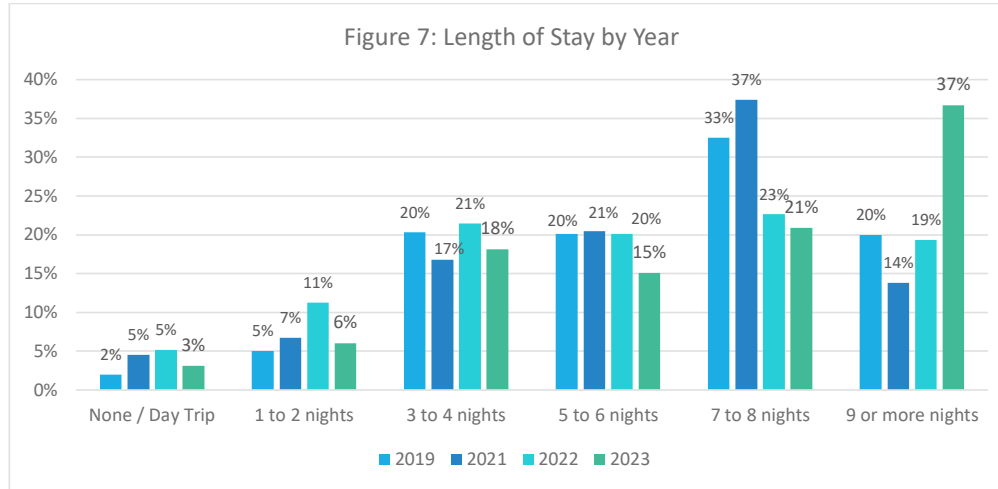
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
January	9.5%	1.9%	0.0%	4.3%	4.3%	5.1%	3.0%
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	0.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%
November	7.2%	4.7%	0.0%	6.3%	2.9%	6.9%	0.0%
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%
N	951	1,504	34	1,361	70	1044	33

TABLE 10: Visitation by Month by Year



Note: For the 2019 survey, data collection occurred exclusively in January/February; for the 2021 survey, data collection occurred on a continuous basis from June onwards; and for the 2022 survey forward, data collection occurred on a continuous basis throughout the year.

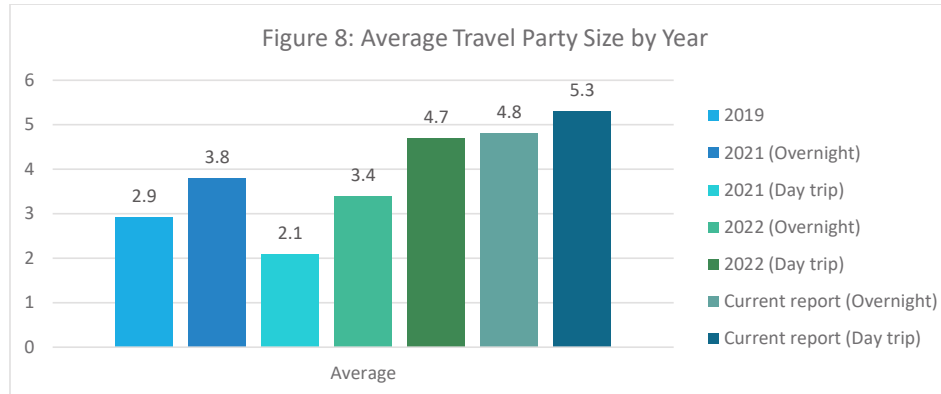
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023
<b>None/day trip only</b>	2.0%	4.5%	5.2%	3.1%
<b>1 night</b>	1.9%	1.8%	2.4%	0.4%
<b>2 nights</b>	3.1%	4.9%	8.9%	5.6%
<b>3 nights</b>	10.3%	7.5%	11.3%	10.2%
<b>4 nights</b>	10.0%	9.3%	10.2%	7.9%
<b>5 nights</b>	7.7%	9.6%	10.5%	7.5%
<b>6 nights</b>	12.4%	10.9%	9.5%	7.6%
<b>7 nights</b>	30.4%	34.0%	19.3%	15.4%
<b>8 nights</b>	2.1%	3.4%	3.4%	5.5%
<b>9 nights</b>	2.3%	2.6%	1.8%	3.7%
<b>10 nights</b>	3.4%	3.1%	3.2%	3.7%
<b>11 nights</b>	0.5%	0.4%	1.3%	2.6%
<b>12 nights</b>	0.8%	0.9%	1.4%	3.7%
<b>13 nights</b>	0.6%	0.7%	0.8%	2.9%
<b>14 nights</b>	4.8%	4.2%	3.6%	4.4%
<b>15 nights</b>	0.5%	0.8%	1.1%	2.9%
<b>More than 15 nights</b>	7.1%	1.1%	6.2%	12.8%
<b>N</b>	950	996	1,519	1,103

TABLE 11: Length of Stay by Year

Please indicate how many people (including yourself) were in your travel party.



	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
<b>Average</b>	2.9	3.8	2.1	3.4	4.7	4.8	5.3
<b>N</b>	951	995	45	1,477	79	1,042	30

TABLE 12: Travel Party Size by Year

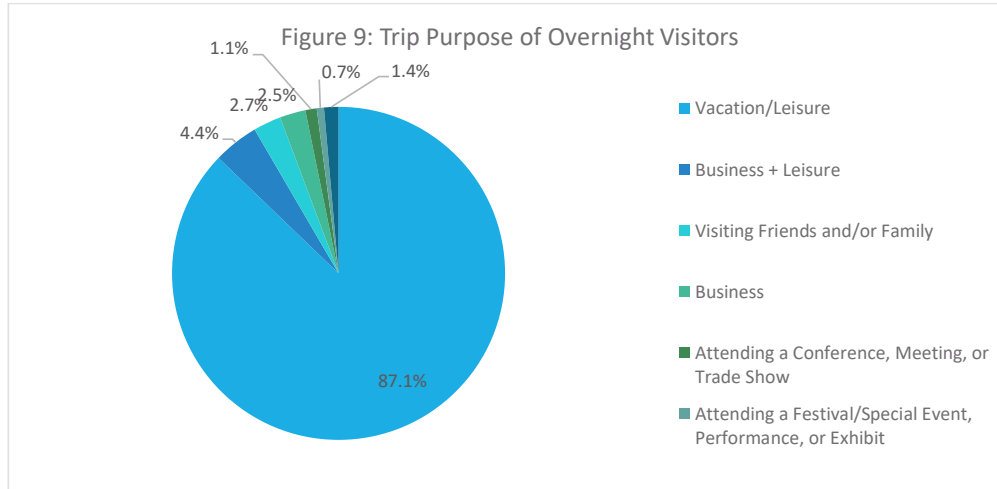
Please indicate by age category how many people were in your travel party.

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	35.3%	25.6%	20.0%	15.7%	1.1%	0.5%	1.7%
	18-24	85.8%	6.9%	3.4%	1.1%	0.1%	0.1%	2.5%
	25-34	35.3%	6.5%	16.8%	13.0%	11.7%	13.6%	2.9%
	35-44	35.3%	21.5%	21.3%	17.9%	0.6%	0.6%	2.8%
	45-54	86.8%	5.6%	5.0%	0.6%	0.1%	0.2%	1.8%
	55-64	84.4%	7.7%	5.3%	0.4%	0.6%	0.1%	1.7%
	65+	83.3%	5.4%	9.2%	0.6%	-	0.2%	2.4%
Day Trip	Under 18	64.7%	14.7%	14.7%	-	-	2.9%	2.9%
	18-24	67.6%	14.7%	5.9%	-	-	5.9%	5.9%
	25-34	44.1%	14.7%	8.8%	5.9%	5.9%	5.9%	14.7%
	35-44	64.7%	14.7%	8.8%	-	2.9%	2.9%	5.9%
	45-54	79.4%	11.8%	5.9%	2.9%	-	-	-
	55-64	79.4%	5.9%	2.9%	2.9%	-	2.9%	5.9%
	65+	82.4%	11.8%	5.9%	-	-	-	-

TABLE 13: Travel Party Ages by Year



### What was the main purpose of your overnight visit to Hilton Head Island?



	2021	2022	2023
Vacation/Leisure	82.1%	74.3%	87.1%
Business + Leisure	6.7%	6.9%	4.4%
Visiting Friends and/or Family	3.9%	5.0%	2.7%
Business	2.1%	5.3%	2.5%
Attending a Conference, Meeting, or Trade Show	2.3%	4.2%	1.1%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%	2.5%	0.7%
Other <sup>2</sup>	1.9%	1.7%	1.4%
N	995	1,491	1,081

TABLE 14: Trip Purpose of Overnight Visitors

### Day Trip Visitors:

#### Was this visit part of an overnight vacation or a day trip from home?

	2021	2022	2023
Part of a vacation	57.8%	72.2%	76.5%
Day trip from home	42.2%	27.8%	23.5%
N	45	79	34

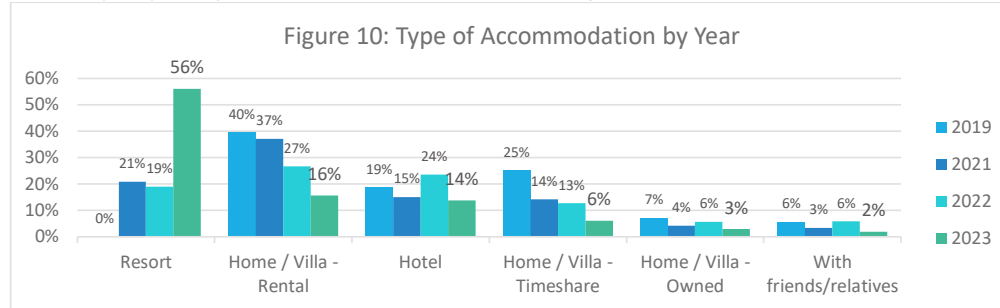
TABLE 15: Day Trip as Part of a Vacation or Day Trip from Home

#### Where did you stay overnight?

	2021	2022	2023
Charleston	19.2%	50.9%	26.9%
Savannah	42.3%	19.3%	23.1%
Tybee Island	7.7%	10.5%	19.2%
Beaufort	19.2%	14.0%	15.4%
Jacksonville	3.8%	3.5%	11.5%
Fripp Island	3.8%	-	-
Other	3.8%	1.8%	3.8%
N	26	57	26

TABLE 16: Day Trip Visitors' Overnight Location

<sup>2</sup> Other responses for trip purpose include research for relocation to HHI, golf or tennis tournament, birthday, or anniversary trip.

**Overnight Visitors:****What was your primary form of accommodation while visiting Hilton Head Island?**

	2019	2021	2022	2023
<b>Resort</b>	-	20.9%	19.0%	56.1%
<b>Home / Villa - Rental</b>	39.5%	37.2%	26.6%	15.6%
<b>Hotel</b>	18.6%	15.0%	23.6%	13.7%
<b>Home / Villa - Timeshare</b>	25.2%	14.2%	12.7%	6.1%
<b>Home / Villa - Owned</b>	7.1%	4.3%	5.6%	3.0%
<b>With friends/relatives</b>	5.6%	3.4%	5.9%	2.0%
<b>RV park</b>	1.1%	0.4%	1.5%	0.4%
<b>Other</b>	1.4%	0.3%	0.1%	-
<b>None – Day Trip only</b>	1.7%	4.3%	5.0%	3.0%
<b>N</b>	951	1,040	1,570	1,115

TABLE 17: Types of Accommodation by Year

**What was the name of the Hotel/Resort where you stayed?**

<b>Hampton Inn &amp; Suites Bluffton-Sun City</b>	14.7%
<b>Sonesta Resort Hilton Head Island</b>	10.5%
<b>Hilton Beachfront Resort &amp; Spa</b>	10.0%
<b>The Westin Hilton Head Island Resort</b>	7.9%
<b>Omni Hilton Head Oceanfront Resort</b>	5.8%
<b>Sea Pines Resort</b>	3.7%
<b>Barony Beach Club</b>	3.2%
<b>Beach House Hilton Head Island</b>	3.2%
<b>Comfort Suites Bluffton-Hilton Head Island</b>	3.2%
<b>Grand Hilton Head Inn</b>	3.2%
<b>N</b>	190

TABLE 18: Top 10 Hotels or Resorts

**Which of the following online platforms did you use to make your home/villa reservation?**

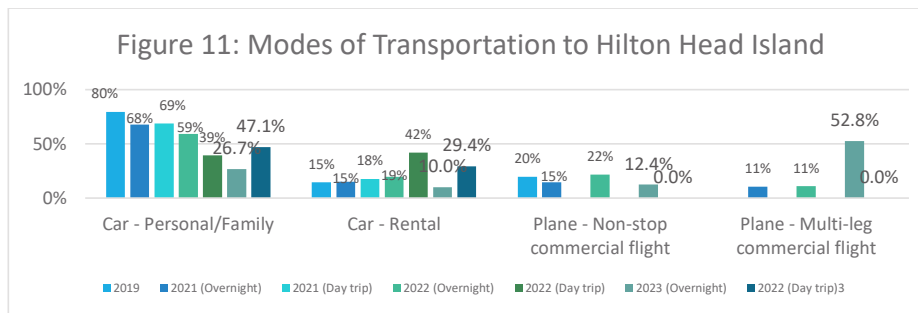
	2019	2021	2022	2023
Directly with owner	-	6.2%	6.0%	-
VRBO	32.8%	34.2%	29.2%	32.3%
A Local vacation rental company	22.7%	22.9%	24.7%	22.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%
Airbnb	2.4%	10.0%	12.0%	10.2%
Vacasa	-	4.9%	5.5%	6.6%
HomeAway	-	2.2%	3.5%	4.2%
TurnKey	-	1.3%	-	3.0%
I don't remember	3.5%	0.8%	3.0%	1.2%
Booking.com	-	0.3%	2.2%	0.6%
None	-	0.5%	0.5%	0.6%
Other	23.5%	1.6%	0.5%	8.4%
<b>N</b>		371	401	167

TABLE 19: Booking Platforms for Home/Villa Rental

## What type of transportation did you use to travel to Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Car - Personal/Family	79.5%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%
Car - Rental	14.7%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%
Plane - Non-stop commercial flight	19.5% <sup>3</sup>	14.8%	-	21.5%	-	12.4%	-
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-
Plane - Private	0.2%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%
Personal RV	1.1%	2.2%	-	4.9%	1.3%	1.9%	17.6%
Motor Coach/Tour bus	0.0%	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%
Other	0.6%	0.6%	-	0.1%	-	0.2%	-
N	953	995	45	1,477	79	1,115	34

TABLE 20: Modes of Transportation to Hilton Head Island



## Visitors Arriving by Plane:

## At which airport did you land?

	2019	2021	2022	2023
Hilton Head Island	12.8%	39.8%	33.8%	81.6%
Savannah/Hilton Head International	69.5%	40.6%	38.1%	12.1%
Charleston	9.2%	8.8%	12.7%	3.3%
Atlanta	2.8%	5.6%	6.1%	1.4%
Jacksonville	1.4%	2.0%	5.5%	1.1%
Charlotte	1.4%	2.0%	3.3%	0.3%
Other	2.8%	1.2%	0.4%	0.3%
N	114	251	488	728

TABLE 21: Arrival Airport by Year

## Which commercial airline did you use?

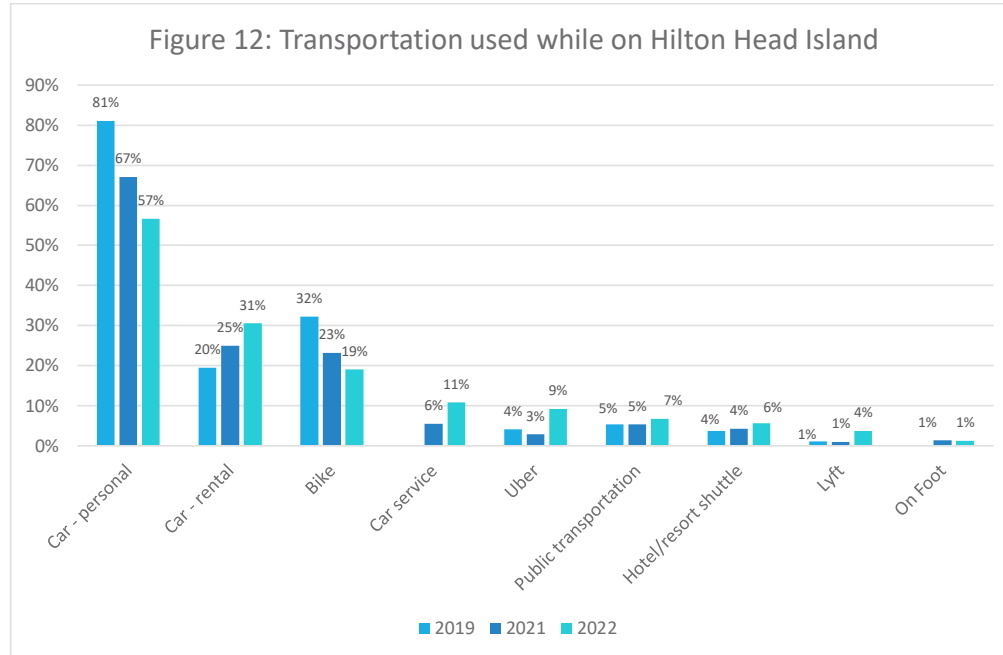
	2021	2022	2023
American Airlines	38.9%	44.8%	25.4%
Southwest	8.1%	9.0%	14.2%
Silver Airways	0.8%	1.8%	14.2%
Air Canada	5.3%	6.8%	12.8%
JetBlue	6.5%	3.6%	12.2%
Frontier	1.6%	2.3%	11.9%
Frontier	0.4%	2.3%	11.9%
Delta	16.6%	7.0%	2.6%
Allegiant	10.1%	8.1%	2.1%
Alaska	2.8%	10.4%	1.7%
Breeze	1.2%	3.2%	1.4%
Sun Country Airlines	0.4%	0.9%	0.1%
United	6.9%	1.8%	-
Spirit	0.4%	0.2%	-
N	247	442	720

TABLE 22: Commercial Airlines Used

<sup>3</sup> The 2019 survey did not divide commercial flights into non-stop and multi-leg, so stated percentage is for all commercial flights.



Once on Hilton Head Island, what mode(s) of transportation did you use?



	2019	2021	2022	2023
Car - personal	81.1%	67.1%	56.7%	31.7%
Car - rental	19.5%	25.0%	30.5%	19.4%
Bike	32.2%	23.2%	19.1%	15.2%
Car service	-	5.5%	10.9%	14.5%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%	6.8%	12.5%
Shuttle offered by the hotel/resort	3.7%	4.2%	5.7%	11.1%
Uber	4.1%	2.9%	9.2%	8.5%
Lyft	1.1%	1.0%	3.7%	5.8%
On Foot	-	1.4%	1.3%	0.8%
Other	-	0.1%	0.1%	-
N	948	995	1,477	1,115

TABLE 23: Transportation Used While on Hilton Head

Please indicate the approximate total amount of money that was spent by your party/group for each category while in the Hilton Head Island area.

	Villa Rental	Hotel	Timeshare	Second Homeowner	Non-paying Guests	Day Trip	Overall
Transportation	\$201	\$335	\$185	\$107	\$162	\$57	\$274
Lodging	\$2,834	\$1,004	\$1,229	\$0	\$0	\$0	\$1,315
Food - Dining	\$606	\$833	\$907	\$579	\$401	\$166	\$763
Food - Grocery	\$338	\$692	\$251	\$314	\$171	\$107	\$573
Shopping	\$485	\$795	\$274	\$415	\$479	\$157	\$684
Spas	\$29	\$276	\$25	\$46	\$49	\$73	\$187
Golf	\$54	\$260	\$72	\$96	\$150	\$29	\$189
Biking	\$69	\$74	\$39	\$16	\$37	\$20	\$63
Performance/Visual Arts	\$35	\$272	\$18	\$12	\$57	\$71	\$183
Festivals	\$12	\$260	\$6	\$18	\$37	\$45	\$168
Museums/Historical Tours	\$42	\$242	\$32	\$12	\$33	\$74	\$163
Boating/Sailing/Fishing	\$137	\$288	\$203	\$31	\$175	\$91	\$231
Nature-based Activities	\$18	\$258	\$17	\$15	\$38	\$41	\$169
Dolphin Tours	\$56	\$272	\$34	\$8	\$48	\$58	\$187
Tennis	\$13	\$259	\$3	\$159	\$11	\$55	\$173
Other Expenses	\$55	\$288	\$64	\$75	\$161	\$13	\$204
<b>Total Expenditure</b>	<b>\$4,864</b>	<b>\$5,890</b>	<b>\$3,352</b>	<b>\$1,894</b>	<b>\$1,917</b>	<b>\$1,414</b>	<b>\$5,241</b>

Table 24: Average Per Travel Party Trip Expenditures by Category and Visitor Type

## What are the three primary reasons why you visited Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
<b>Beaches</b>	73.5%	75.4%	55.6%	62.0%	38.0%	40.7%	44.1%
<b>Relaxation</b>	58.6%	51.5%	31.1%	34.1%	12.7%	31.7%	20.6%
<b>Time with family/friends</b>	48.4%	46.6%	24.4%	32.6%	10.1%	22.2%	26.5%
<b>Nature-based activities (dolphin/turtle tours, fishing, etc.)</b>	11.3%	12.0%	2.2%	13.3%	3.8%	19.5%	23.5%
<b>Biking</b>	15.7%	16.4%	11.1%	21.3%	27.8%	17.4%	11.8%
<b>Culinary</b>	13.9%	12.2%	31.1%	14.2%	27.8%	14.3%	20.6%
<b>Shopping</b>	11.7%	10.9%	24.4%	10.7%	8.9%	14.3%	20.6%
<b>Golf</b>	16.3%	13.7%	8.9%	10.4%	13.9%	14.1%	2.9%
<b>Business trip (convention, meeting, etc.)</b>	1.2%	5.1%	4.4%	10.5%	24.1%	13.1%	2.9%
<b>Health/wellness/fitness</b>	2.1%	3.4%	11.1%	5.9%	6.3%	13.1%	8.8%
<b>Boating / Sailing / Kayaking</b>	1.6%	7.5%	11.1%	13.6%	16.5%	12.3%	26.5%
<b>Festivals</b>	4.0%	3.6%	6.7%	8.2%	3.8%	11.6%	8.8%
<b>Attend sporting event</b>	0.6%	4.7%	15.6%	11.2%	10.1%	11.3%	2.9%
<b>Parks</b>	1.4%	1.8%	6.7%	4.9%	5.1%	11.1%	2.9%
<b>Heritage attractions / Museum / Historical tours</b>	3.3%	6.5%	20.0%	10.6%	16.5%	6.1%	32.4%
<b>Tennis</b>	2.1%	1.7%	6.7%	2.6%	11.4%	3.9%	2.9%
<b>Other</b>	8.1%	4.1%	-	3.9%	2.5%	1.8%	5.9%
<b>Wedding</b>	-	1.2%	-	1.6%	0.0%	0.9%	2.9%
<b>N</b>	953	995	45	1,477	79	1,115	34

TABLE 25: Three Primary Reasons for Visitation



## Which of the following activities did you actively participate in?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
<b>Beaches</b>	83.2%	81.8%	42.2%	69.4%	51.9%	46.%	44.1%
<b>Biking</b>	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%
<b>Relaxation</b>	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%
<b>Shopping</b>	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%
<b>Time with family/friends</b>	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%
<b>Water excursions</b>	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%
<b>Attend sporting event</b>	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%
<b>Nature-based activities (dolphin/turtle tours, fishing, etc.)</b>	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%
<b>Culinary</b>	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%
<b>Museum / Historical tours</b>	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%
<b>Health / Wellness / Fitness</b>	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%
<b>Golf</b>	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%
<b>Music or theatrical performance / Visual arts exhibit</b>	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%
<b>Festivals</b>	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%
<b>Business/work</b>	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%
<b>Spas</b>	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%
<b>Tennis</b>	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%
<b>Sports activities</b>	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%
<b>Other</b>	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%
<b>University visit / Education / Intellectual programs</b>	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%
<b>N</b>	950	995	45	1,477	79	1,115	34

TABLE 26: Activities Visitors Participated In

## Which shopping locations did you visit?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Coligny Plaza	68.8%	64.7%	26.7%	54.4%	32.9%	31.6%	23.5%
Harbour Town	60.2%	55.8%	26.7%	44.2%	39.2%	29.2%	23.5%
Shelter Cove Harbour	47.8%	42.0%	17.8%	36.9%	21.5%	23.0%	20.6%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%	25.0%	8.9%	21.2%	29.4%
Downtown Bluffton	30.5%	25.4%	28.9%	31.1%	34.2%	20.4%	38.2%
Tanger Outlets	53.2%	34.9%	37.8%	26.1%	22.8%	19.6%	5.9%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%	21.7%	20.3%	18.3%	20.6%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%	25.5%	6.3%	18.1%	35.3%
Main Street Village	25.0%	20.2%	8.9%	24.6%	25.3%	14.9%	20.6%
South Beach Marina	25.2%	21.5%	11.1%	17.7%	15.2%	14.9%	23.5%
Village at Wexford	16.4%	10.9%	6.7%	12.8%	11.4%	10.9%	11.8%
Buckwalter shopping areas	2.9%	4.9%	11.1%	8.3%	10.1%	10.1%	8.8%
Other	5.5%	2.1%	2.2%	2.3%	1.3%	2.1%	67.6%
None	2.1%	1.5%	2.2%	0.7%	1.3%	0.7%	23.5%
N	945	995	45	1,477	79	1,115	34

TABLE 27: Shopping Locations Visited

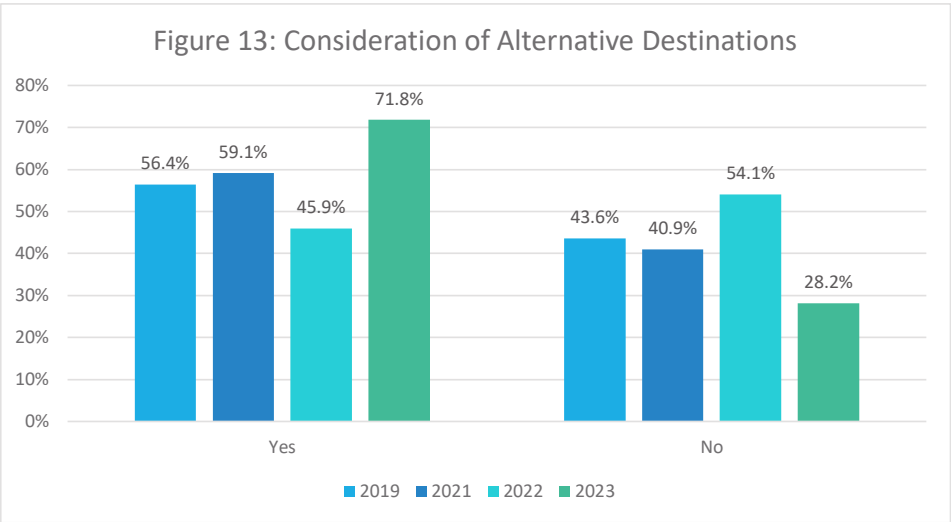
## Did you visit any of the following cities while staying on Hilton Head Island?

	2021	2022	2023
Bluffton	37.0%	37.4%	66.2%
Tybee Island	7.3%	10.0%	51.1%
Savannah	29.3%	26.0%	16.0%
Charleston	15.7%	20.8%	10.5%
Beaufort	17.7%	23.2%	9.4%
Daufuskie Island	13.0%	17.1%	7.8%
Jacksonville	5.4%	11.3%	4.8%
Other	0.9%	0.5%	0.9%
I did not visit any other cities.	28.8%	20.1%	12.2%
N	995	1,477	1,115

TABLE 28: Other Cities Visited While on Hilton Head

TRAVEL PLANNING

Before deciding to visit Hilton Head Island, did you consider any other destinations?



	2019	2021	2022	2023
Yes	56.4%	59.1%	45.9%	71.8%
No	43.6%	40.9%	54.1%	28.2%
N	1,691	1,039	1,570	1,114

TABLE 29: Consideration of alternative destinations by year



## Which of the following destinations did you consider visiting?

	2019	2021	2022	2023
Gulf Shores, AL	14.9%	19.8%	28.1%	18.3%
Alabama Golf Trail	1.6%	23.8%	31.9%	15.1%
Hawaiian Islands	4.8%	15.8%	24.4%	14.4%
Other	11.3%	13.2%	13.6%	12.4%
Outer Banks, NC	22.6%	28.9%	20.0%	12.3%
Caribbean	12.5%	23.1%	20.4%	12.1%
Marco Island/Naples, FL	12.1%	14.4%	18.2%	11.8%
The Florida Keys	19.4%	12.5%	8.5%	11.6%
Savannah, GA	33.9%	20.0%	19.3%	11.3%
Aspen, CO	2.0%	11.5%	10.1%	10.4%
Jekyll Island, GA	12.5%	13.2%	10.1%	10.4%
Telluride, CO	0.8%	7.8%	12.4%	10.3%
Orlando, FL	12.1%	19.3%	15.0%	9.5%
Sea Island, GA	4.8%	10.4%	12.5%	9.4%
Charleston, SC	45.2%	24.2%	19.3%	8.5%
Sandestin, FL	8.5%	9.2%	13.1%	8.4%
Reynolds Plantation, GA	1.2%	8.9%	10.7%	8.3%
St. Simons Island, GA	-	10.1%	10.4%	7.6%
Kiawah Island, SC	14.1%	15.5%	10.8%	7.5%
Sanibel Island, FL	13.7%	13.4%	13.8%	7.5%
Myrtle Beach, SC	37.5%	20.5%	12.9%	7.0%
Pinehurst, NC	3.2%	9.9%	12.2%	7.0%
Isle of Palms, SC	12.5%	18.1%	16.1%	6.9%
Sarasota, FL	6.9%	7.3%	9.6%	6.9%
Napa/Sonoma, CA	2.8%	8.5%	8.9%	6.4%
Tampa/St. Petersburg, FL	10.1%	9.6%	6.5%	6.3%
Tybee Island, GA	18.2%	14.6%	8.8%	6.3%
Ponte Vedre, FL	3.6%	8.5%	8.9%	5.5%
Santa Fe, NM	1.6%	2.8%	4.0%	5.4%
Bluffton, SC	0.0%	1.9%	4.4%	1.5%
<b>Total</b>	<b>248</b>	<b>425</b>	<b>720</b>	<b>800</b>

TABLE 30: Alternative Destinations by Year

**How did Hilton Head Island make it to your list of places to consider for your vacation?**

	2019	2021	2022	2023
Wanted to visit a beach destination.	48.3%	49.7%	45.7%	32.6%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%	23.3%	23.4%
Had visited in the past and wanted to return.	80.3%	60.0%	42.5%	20.4%
Wanted to visit heritage attractions.	4.6%	7.8%	20.3%	18.2%
It was recommended by friends/family.	18.2%	24.1%	26.2%	12.2%
Wanted to visit someplace new.	8.6%	18.1%	17.8%	10.6%
Wanted to visit some place within driving distance.	22.7%	23.9%	19.4%	7.9%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%	10.1%	4.7%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%	9.9%	4.4%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%	9.3%	4.2%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%	6.3%	3.2%
Wanted to attend a sporting event.	1.7%	2.9%	4.3%	1.9%
Other	14.2%	8.5%	5.1%	2.9%
<b>Total</b>	<b>953</b>	<b>1,039</b>	<b>1,570</b>	<b>1,288</b>

TABLE 31: Reasons for Visiting Hilton Head Island

**How likely are you to return to Hilton Head Island?**

	2021	2022	2023
<b>Very likely</b>	74.3%	62.7%	44.4%
<b>Likely</b>	15.0%	22.5%	24.3%
<b>Neutral</b>	7.6%	9.5%	17.2%
<b>Unlikely</b>	1.9%	3.7%	13.4%
<b>Very Unlikely</b>	1.3%	1.7%	0.6%
<b>Total</b>	<b>1,027</b>	<b>1,510</b>	<b>1,027</b>

TABLE 32: Likelihood of Visiting Hilton Head Island Again

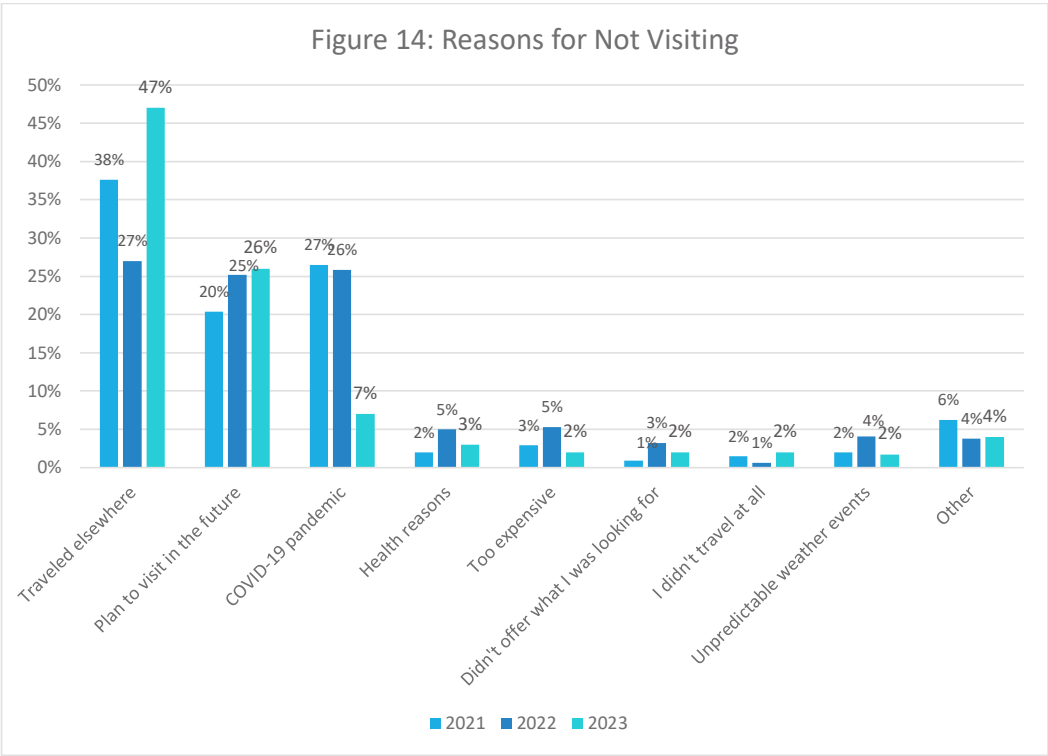
**How likely are you to recommend visiting Hilton Head Island to a friend or family member?**

	2021	2022	2023
<b>Definitely Recommend</b>	79.7%	70.2%	48.4%
<b>Probably Recommend</b>	14.9%	21.8%	22.8%
<b>May or May Not Recommend</b>	4.9%	6.2%	14.1%
<b>Probably Not Recommend</b>	0.5%	1.5%	14.4%
<b>Definitely Not Recommend</b>	0.0%	0.2%	0.2%
<b>Total</b>	<b>1,034</b>	<b>1,522</b>	<b>1,039</b>

TABLE 33: Likelihood of Recommending a Visit to Hilton Head Island

NON-VISITORS

Which of the following most accurately reflects why you did not visit Hilton Head Island-Bluffton during the last 12 months?



	2021	2022	2023
Traveled elsewhere	37.6%	27.0%	47.0%
Plan to visit in the future	20.4%	25.2%	26.0%
COVID-19 pandemic	26.5%	25.8%	7.0%
Health reasons	2.0%	5.0%	3.0%
Too expensive	2.9%	5.3%	2.0%
Didn't offer what I was looking for	0.9%	3.2%	2.0%
I didn't travel at all	1.5%	0.6%	2.0%
Unpredictable weather events	2.0%	4.1%	1.7%
Other	6.2%	3.8%	4.0%
Total	860	341	100

TABLE 34: Reasons for not visiting



Please indicate the region(s) that you traveled to in the past 12 months.

	2021	2022	2023
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%
Canada	1.4%	10.9%	16.0%
Europe	1.2%	7.3%	10.0%
Asia	0.5%	4.4%	8.0%
Latin America and Caribbean	2.1%	6.5%	6.0%
Australia/New Zealand	0.2%	3.2%	6.0%
Africa	0.3%	1.2%	1.0%
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
<b>Total</b>	<b>860</b>	<b>341</b>	<b>100</b>

TABLE 35: Regions Visited by Non-Visitors in the Past 12 Months

How many times have you visited Hilton Head Island-Bluffton in the past 10 years?

	2021	2022	2023
<b>Never visited</b>	38.9%	42.9%	33.7%
<b>1</b>	18.6%	14.0%	9.5%
<b>2 to 5</b>	30.2%	36.4%	40.8%
<b>6 to 10</b>	9.8%	5.0%	13.6%
<b>11 to 20</b>	1.9%	0.9%	1.2%
<b>21 or more</b>	0.9%	0.5%	1.2%
<b>Total</b>	<b>860</b>	<b>341</b>	<b>169</b>

TABLE 36: Visitation Frequency in the Past 10 Years by Non-Visitors

Do you have plans to visit Hilton Head Island-Bluffton in the near future?

	2021	2022	2023
<b>Yes, within one year</b>	49.2%	50.1%	48.8%
<b>Yes, but not sure when</b>	42.5%	49.0%	47.0%
<b>No</b>	8.3%	0.9%	4.2%
<b>Total</b>	<b>859</b>	<b>341</b>	<b>168</b>

TABLE 37: Plans of visiting Hilton Head Island in the Future by Non-Visitors

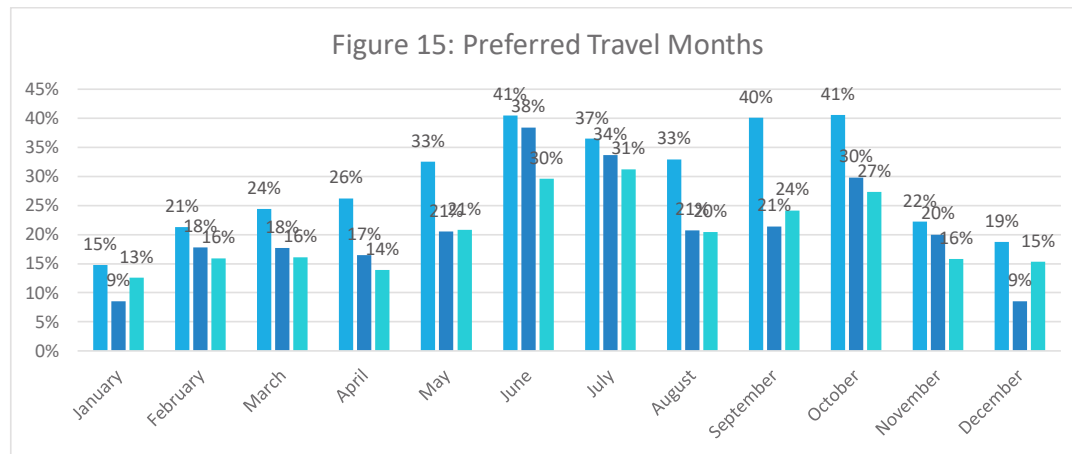
**TRAVEL BEHAVIOR – ALL RESPONDENTS**

On average, approximately how many leisure/vacation trips do you take each year?

	2021	2022	2023
0 to 1	15.3%	10.0%	7.3%
2 to 4	55.1%	47.3%	50.6%
5 to 7	19.2%	29.9%	23.4%
8 to 10	6.3%	8.2%	15.8%
More than 10	4.1%	4.7%	2.9%
<b>Total</b>	<b>1,042</b>	<b>984</b>	<b>1,625</b>

TABLE 38: Frequency of Leisure/Vacation Trips

Which month(s) are you most likely to travel for vacation purposes?



	2021	2022	2023
January	14.8%	8.5%	12.6%
February	21.3%	17.8%	15.9%
March	24.4%	17.7%	16.1%
April	26.2%	16.5%	13.9%
May	32.5%	20.5%	20.8%
June	40.5%	38.4%	29.6%
July	36.5%	33.7%	31.3%
August	32.9%	20.7%	20.4%
September	40.1%	21.4%	24.1%
October	40.6%	29.8%	27.3%
November	22.2%	20.0%	15.8%
December	18.7%	8.5%	15.3%
<b>Total</b>	<b>1,042</b>	<b>984</b>	<b>1,625</b>

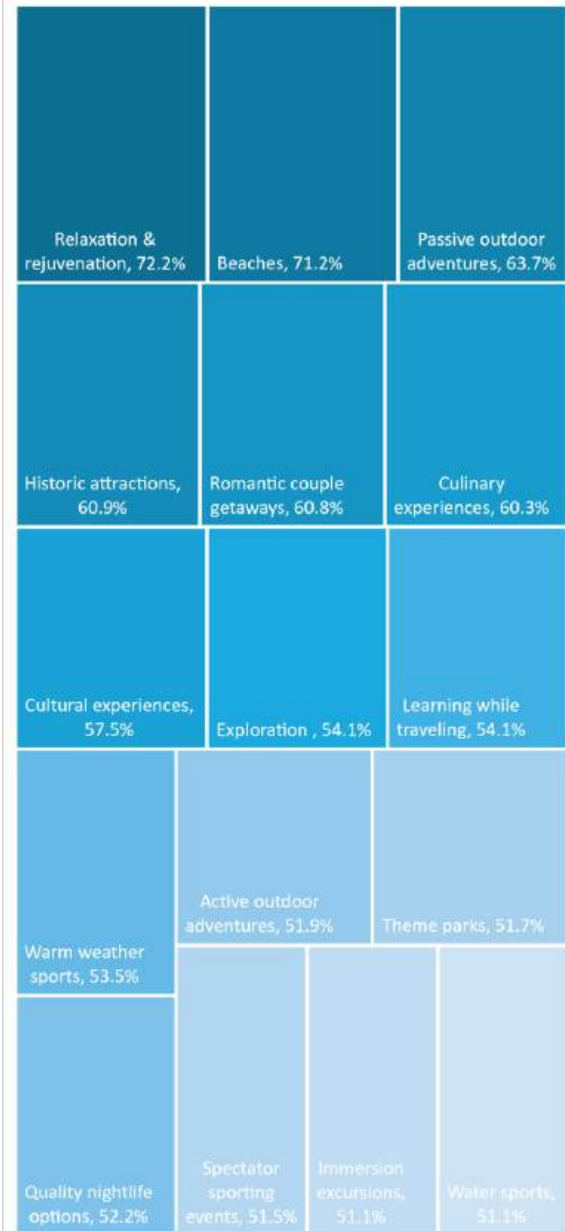
TABLE 39: Preferred Travel Months

To what extent do the following types of vacations/leisure trips and/or travel experiences appeal to you?

"Appealing" + "Very Appealing"	2021	2022	2023
Relaxation & rejuvenation	85.4%	66.9%	72.2%
Beaches	88.4%	65.1%	71.2%
Passive outdoor adventures	72.6%	64.4%	63.7%
Historic attractions	75.5%	64.4%	60.9%
Romantic couple getaways	70.0%	65.0%	60.8%
Culinary experiences	70.1%	63.7%	60.3%
Cultural experiences	70.7%	62.9%	57.5%
Exploration	57.5%	59.8%	54.1%
Learning while traveling	60.9%	56.3%	54.1%
Warm weather sports	52.7%	61.2%	53.5%
Quality nightlife options	52.6%	60.3%	52.2%
Active outdoor adventures	46.8%	59.6%	51.9%
Theme parks	44.7%	58.7%	51.7%
Spectator sporting events	49.2%	57.0%	51.5%
Immersion excursions	49.6%	57.4%	51.1%
Water sports	48.8%	60.4%	51.1%
Luxury camping	39.9%	55.0%	50.7%
Performing/cultural arts getaways	51.2%	58.6%	50.5%
Art	49.8%	57.1%	49.2%
Urban getaway	48.4%	58.5%	48.0%
Medical/wellness	40.8%	55.5%	47.9%
Waterparks	40.3%	54.4%	47.9%
Winter sports	30.2%	53.9%	42.5%
Golf getaways	37.4%	50.6%	41.9%
Voluntourism	29.5%	49.9%	40.8%
Tennis getaways	25.8%	48.5%	36.2%
<b>Total</b>	<b>949</b>	<b>1,005</b>	<b>1,625</b>

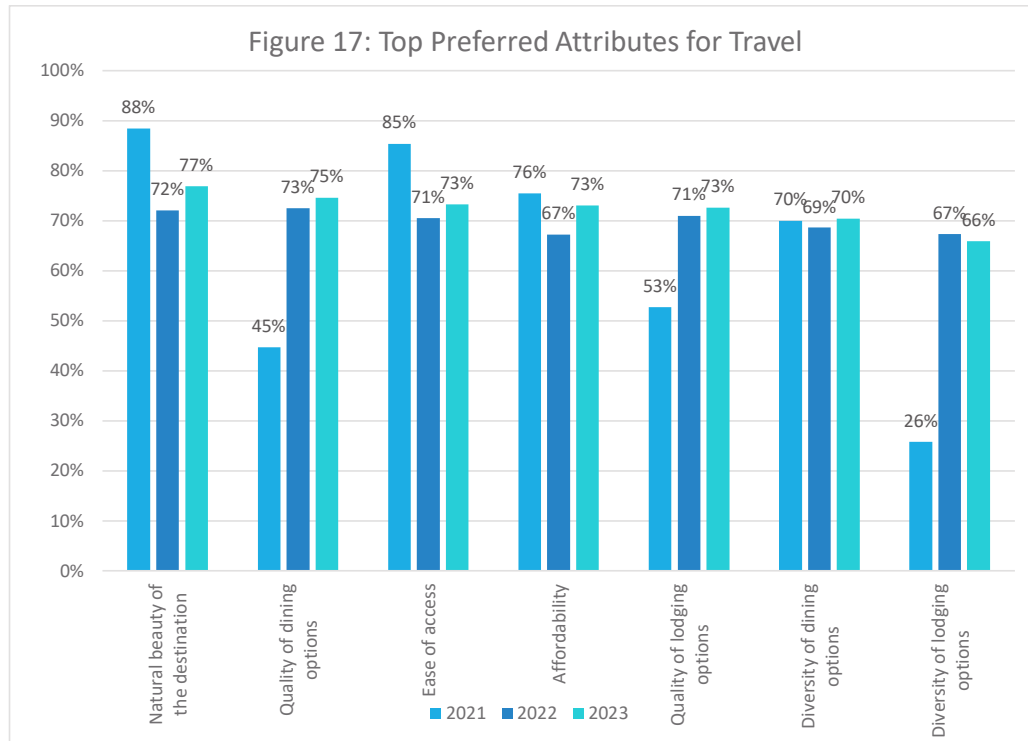
TABLE 40: Preferred Vacation/Leisure Travel Experiences

Figure 16: Preferred Travel Experiences





How important are the following attributes to you in choosing a leisure vacation?



"Important" + "Very Important"	2021	2022	2023
Natural beauty of the destination	88.4%	72.1%	76.9%
Quality of dining options	44.7%	72.5%	74.6%
Ease of access	85.4%	70.5%	73.3%
Affordability	75.5%	67.2%	73.0%
Quality of lodging options	52.7%	71.0%	72.6%
Diversity of dining options	70.0%	68.6%	70.4%
Diversity of lodging options	25.8%	67.3%	65.9%
Low traffic congestion	60.9%	64.8%	63.6%
Travel distance	70.7%	63.1%	63.3%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%
Activities like events/festivals	49.6%	64.2%	55.4%
Nightlife activity options	48.4%	61.4%	53.2%
Medical/wellness	37.4%	60.4%	52.6%
Public transportation	57.5%	57.0%	49.2%
<b>Total</b>	<b>949</b>	<b>1,005</b>	

TABLE 41: Preferred Attributes for Vacation/Leisure Travel

Please indicate the extent to which you agree with the following statements.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
I would rather rely on a travel agent or tour operator than make my own travel arrangements.	10.6%	21.7%	29.9%	26.4%	11.3%
I try to support the local economy of places that I visit.	22.9%	42.8%	19.4%	12.3%	2.5%
N 973					

TABLE 42: Travel Preferences

## APPENDIX

### ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
Los Angeles-Long Beach-Anaheim, CA	106	9.3%
New York-Newark-Jersey City, NY-NJ	79	6.9%
Atlanta-Sandy Springs-Roswell, GA	44	3.9%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
San Francisco-Oakland-Fremont, CA	39	3.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
Chicago-Naperville-Elgin, IL-IN	34	3.0%
Pittsburgh, PA	33	2.9%
Charlotte-Concord-Gastonia, NC-SC	23	2.0%
Columbus, OH	23	2.0%
Detroit-Warren-Dearborn, MI	20	1.8%
Charleston-North Charleston, SC	17	1.5%
Louisville/Jefferson County, KY-IN	17	1.5%
Rural OH	16	1.4%
Boston-Cambridge-Newton, MA-NH	15	1.3%
Cincinnati, OH-KY-IN	15	1.3%
Houston-Pasadena-The Woodlands, TX	15	1.3%
Kansas City, MO-KS	15	1.3%
Albany-Schenectady-Troy, NY	14	1.2%
Baltimore-Columbia-Towson, MD	14	1.2%
Austin-Round Rock-San Marcos, TX	13	1.1%
Riverside-San Bernardino-Ontario, CA	13	1.1%
San Diego-Chula Vista-Carlsbad, CA	13	1.1%
Jacksonville, FL	12	1.1%
Wisconsin Rapids-Marshfield, WI	12	1.1%
Greenville-Anderson-Greer, SC	11	1.0%
St. Louis, MO-IL	11	1.0%
Akron, OH	10	0.9%
Columbia, SC	10	0.9%
Rural TX	10	0.9%
Indianapolis-Carmel-Greenwood, IN	9	0.8%
La Crosse-Onalaska, WI-MN	9	0.8%
Rural KY	9	0.8%
San Jose-Sunnyvale-Santa Clara, CA	9	0.8%
Miami-Fort Lauderdale-West Palm Beach, FL	8	0.7%
Minneapolis-St. Paul-Bloomington, MN-WI	8	0.7%
Allentown-Bethlehem-Easton, PA-NJ	7	0.6%
Buffalo-Cheektowaga, NY	7	0.6%
Cape Coral-Fort Myers, FL	7	0.6%
Clarksburg, WV	7	0.6%
Denver-Aurora-Centennial, CO	7	0.6%
Fayetteville-Springdale-Rogers, AR	7	0.6%
Milwaukee-Waukesha, WI	7	0.6%
Orlando-Kissimmee-Sanford, FL	7	0.6%
Rochester, NY	7	0.6%
San Antonio-New Braunfels, TX	7	0.6%



MSA	Count	Percent
Dayton-Kettering-Beavercreek, OH	6	0.5%
Fresno, CA	6	0.5%
Jackson, MS	6	0.5%
Johnstown, PA	6	0.5%
Lancaster, PA	6	0.5%
Las Vegas-Henderson-North Las Vegas, NV	6	0.5%
Little Rock-North Little Rock-Conway, AR	6	0.5%
Sacramento-Roseville-Folsom, CA	6	0.5%
Beaumont-Port Arthur, TX	5	0.4%
Birmingham, AL	5	0.4%
Fayetteville, NC	5	0.4%
Killeen-Temple, TX	5	0.4%
Lansing-East Lansing, MI	5	0.4%
Memphis, TN-MS-AR	5	0.4%
Phoenix-Mesa-Chandler, AZ	5	0.4%
Rural IA	5	0.4%
Rural ME	5	0.4%
Rural NY	5	0.4%
Savannah, GA	5	0.4%
Seattle-Tacoma-Bellevue, WA	5	0.4%
Toledo, OH	5	0.4%
Anchorage, AK	4	0.4%
Boise City, ID	4	0.4%
Brainerd, MN	4	0.4%
Calhoun, GA	4	0.4%
Findlay, OH	4	0.4%
Lafayette-West Lafayette, IN	4	0.4%
Ocala, FL	4	0.4%
Providence-Warwick, RI-MA	4	0.4%
Richmond, VA	4	0.4%
Rural CO	4	0.4%
Rural ND	4	0.4%
Asheville, NC	3	0.3%
Athens-Clarke County, GA	3	0.3%
Atlantic City-Hammonton, NJ	3	0.3%
Deltona-Daytona Beach-Ormond Beach, FL	3	0.3%
Erie, PA	3	0.3%
Greensboro-High Point, NC	3	0.3%
Gulfport-Biloxi, MS	3	0.3%
Omaha, NE-IA	3	0.3%
Panama City-Panama City Beach, FL	3	0.3%
Roanoke, VA	3	0.3%
Rockingham, NC	3	0.3%
Rural AK	3	0.3%
Rural FL	3	0.3%
Rural KS	3	0.3%
Salinas, CA	3	0.3%
Stevens Point-Plover, WI	3	0.3%
Sumter, SC	3	0.3%

MSA	Count	Percent
Tucson, AZ	3	0.3%
Virginia Beach-Chesapeake-Norfolk, VA-NC	3	0.3%
Warner Robins, GA	3	0.3%
Albany, GA	2	0.2%
Augusta-Waterville, ME	2	0.2%
Chambersburg, PA	2	0.2%
Ellensburg, WA	2	0.2%
Fergus Falls, MN	2	0.2%
Keene, NH	2	0.2%
Kendallville, IN	2	0.2%
Maryville, MO	2	0.2%
Merced, CA	2	0.2%
Mobile, AL	2	0.2%
Modesto, CA	2	0.2%
Natchitoches, LA	2	0.2%
Pensacola-Ferry Pass-Brent, FL	2	0.2%
Port St. Lucie, FL	2	0.2%
Raleigh-Cary, NC	2	0.2%
Redding, CA	2	0.2%
Reno, NV	2	0.2%
Rural LA	2	0.2%
Rural MI	2	0.2%
Seneca, SC	2	0.2%
South Bend-Mishawaka, IN-MI	2	0.2%
Tallahassee, FL	2	0.2%
Terre Haute, IN	2	0.2%
Texarkana, TX-AR	2	0.2%
Torrington, CT	2	0.2%
Tulahoma-Manchester, TN	2	0.2%
Victoria, TX	2	0.2%
Cambridge, OH	1	0.1%
Decatur, IN	1	0.1%
El Paso, TX	1	0.1%
Jamestown-Dunkirk, NY	1	0.1%
Lake Havasu City-Kingman, AZ	1	0.1%
Las Vegas, NM	1	0.1%
Liberal, KS	1	0.1%
Manhattan, KS	1	0.1%
New Orleans-Metairie, LA	1	0.1%
Pullman, WA	1	0.1%
Russellville, AR	1	0.1%
Rutland, VT	1	0.1%
Sebastian-Vero Beach-West Vero Corridor, FL	1	0.1%
St. Cloud, MN	1	0.1%
Thomasville, GA	1	0.1%

**OFFICE OF TOURISM ANALYSIS,  
COLLEGE OF CHARLESTON**

2023 Estimated Total Impact of Tourism in  
Hilton Head Island on Beaufort County



ESTIMATED TOTAL IMPACT OF TOURISM IN

# Hilton Head Island

ON BEAUFORT COUNTY, SOUTH CAROLINA 2023



MARCH 2024

CONDUCTED BY:

MELINDA PATIENCE  
MARK WITTE, PH.D.



COLLEGE of  
CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

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## Introduction

This study estimates the economic impact generated by tourism to the Town of Hilton Head Island in the year 2023. 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. Mark Witte and Melinda Patience of the Office of Tourism Analysis, which is part of 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., CoStar 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 2023 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 2023, 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 input-output (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	920,345
Hotel	481,328
Timeshare	477,628
Second Homeowner	674,278
Non-Paying Guests	174,983
Day Trip	255,358
<b>Total Visitors</b>	<b>2,983,919</b>

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 industry-specific mix of full-time, part-time, and seasonal employment. Seasonal jobs are adjusted to annual equivalents.

**Table 2. 2023 Estimated Total Expenditure by Spending Category**

Category	Totals
Transportation (around the destination)	\$125,971,387
Lodging	\$900,075,506
Food – Dining Out	\$450,188,097
Food – Groceries	\$237,565,102
Shopping	\$309,837,707
Spas	\$52,742,751
Golf	\$82,444,207
Biking	\$36,645,071
Performance/Visual Arts	\$44,619,961
Festivals	\$37,384,228
Museums/Historical Tours	\$45,162,778
Boating/Sailing/Fishing	\$112,463,225
Nature-based Activities	\$39,205,349
Dolphin Tours	\$53,253,515
Tennis	\$63,269,618
Other Expenses	\$76,625,335
<b>Total Expenditure</b>	<b>\$2,667,453,836</b>

- **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

After a record high number of visitors in 2021, the total number of visitors slightly declined in 2022 and 2023. Notably, while villa rental visitors, timeshare visitors and hotel visitors waned, there was an increase in second homeowner stays, non-paying guests and daytrippers. Even as the “paying” clientele may have decreased in total number, the total spent on lodging increased. Indeed, the decline in total visitors did not create a contraction in total expenditures and total economic impact.



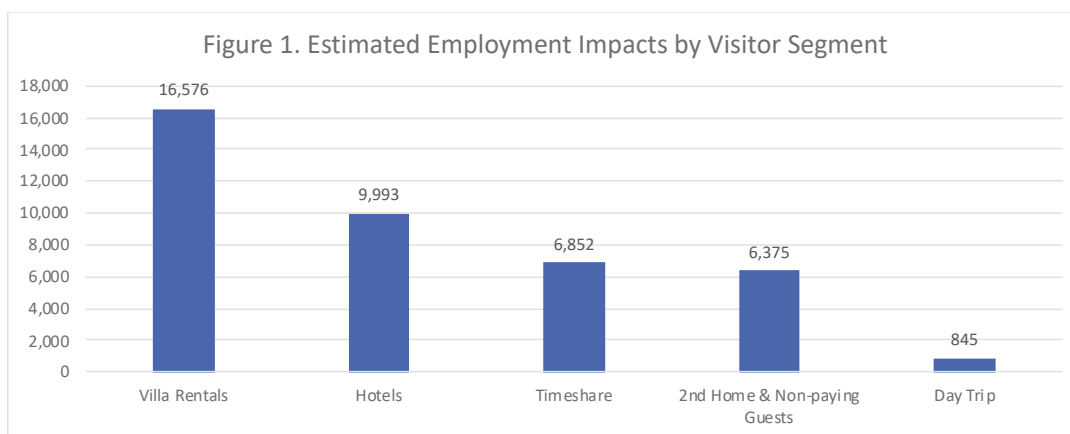
Why? Simply, there were increased expenditures by fewer visitors. Particularly, greater direct visitor spending accrued to boating/sailing/fishing, dolphin tours and nature-based activities; roughly \$128 million of the \$206 million increase in year-over-year direct expenditures (61%) were earned by these industries. And this increase in direct expenditures led to an overall increase in economic impact.

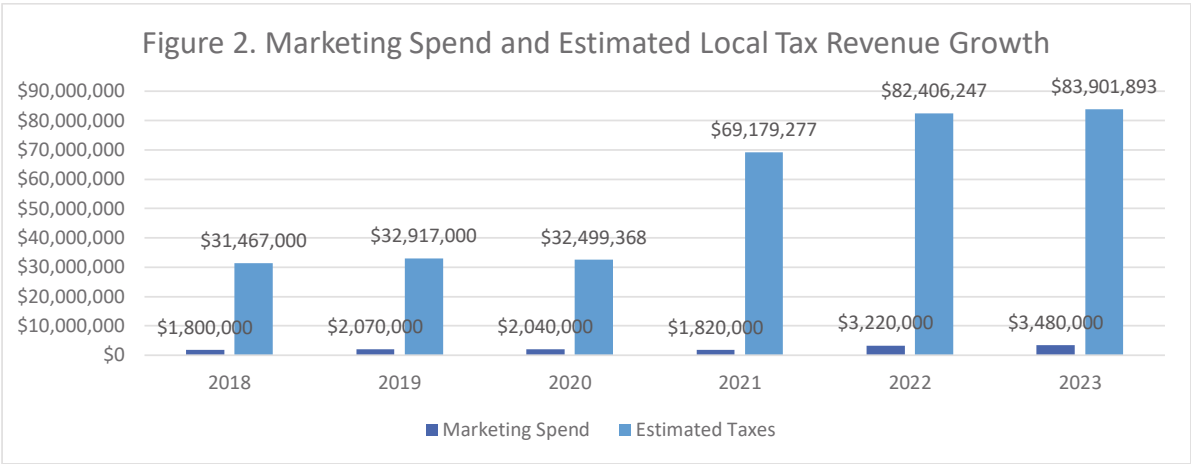
A total of **2.98 million visitors** came to Hilton Head Island in 2023, down 3.4% compared to 2022, down 4.6% compared to 2021, up 14.4% compared to 2020, and up 111.2% compared to 2019. The overall economic impact of this tourism for Beaufort County was **\$3.61 billion**, up 13.5% compared to 2022, up 27.7% compared to 2021, up 162.9% compared to 2020, and up 139.0% 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 **40,641 jobs**, which represent 33.3% 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, part-time, 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 **1.35**. This signifies that every dollar spent by tourists on Hilton Head Island increased output in the overall Beaufort County economy by a total of \$1.35.

The tourist expenditures generated an estimated **\$39.31 million** in tax revenues for local Beaufort County governments. The Town of Hilton Head Island earned an additional **\$44.59 million** in accommodations tax, hospitality tax, and beach preservation fees, as reported by the Town of Hilton Head Island Revenue Services. Together, this **\$83.90 million** in tax revenue represents a Return on Tax Investment (ROTI) of 24.11, based on the \$3.48 million that was spent on destination marketing in 2023. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **\$24.11** in local tax revenue.





## Appendix

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

	Employment	Labor Income	Output
<b>Direct</b>	13,398	\$532,560,202	\$985,790,272
<b>Indirect</b>	1,490	\$69,650,074	\$224,864,209
<b>Induced</b>	1,687	\$78,295,036	\$278,711,172
<b>Total</b>	<b>16,576</b>	<b>\$680,505,312</b>	<b>\$1,489,365,653</b>

**Table A2. Hotel – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	7,982	\$238,231,162	\$557,654,579
<b>Indirect</b>	1,179	\$52,613,736	\$189,837,592
<b>Induced</b>	832	\$38,583,898	\$137,357,950
<b>Total</b>	<b>9,993</b>	<b>\$329,428,796</b>	<b>\$884,850,122</b>

**Table A3. Timeshare – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	5,475	\$188,671,793	\$412,291,086
<b>Indirect</b>	747	\$35,002,352	\$116,462,503
<b>Induced</b>	630	\$29,239,830	\$104,087,729
<b>Total</b>	<b>6,852</b>	<b>\$252,913,976</b>	<b>\$632,841,318</b>

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

	Employment	Labor Income	Output
<b>Direct</b>	5,163	\$145,845,761	\$333,156,603
<b>Indirect</b>	705	\$32,115,330	\$116,983,739
<b>Induced</b>	507	\$23,535,055	\$83,783,008
<b>Total</b>	<b>6,375</b>	<b>\$201,496,146</b>	<b>\$533,923,349</b>

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

	Employment	Labor Income	Output
<b>Direct</b>	672	\$19,429,091	\$43,545,413
<b>Indirect</b>	104	\$4,591,891	\$16,690,979
<b>Induced</b>	69	\$3,197,778	\$11,384,320
<b>Total</b>	<b>845</b>	<b>\$27,218,759</b>	<b>\$71,620,711</b>

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

	Employment	Labor Income	Output
<b>Direct</b>	32,691	\$1,124,738,008	\$2,332,437,953
<b>Indirect</b>	4,225	\$193,973,383	\$664,839,022
<b>Induced</b>	3,725	\$172,851,597	\$615,324,178
<b>Total</b>	<b>40,641</b>	<b>\$1,491,562,988</b>	<b>\$3,612,601,153</b>
<b>Estimated Local Tax Revenue</b>			\$39,311,249
<b>Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)</b>			\$44,590,644
<b>Total Estimated Local Tax Revenue</b>			<b>\$83,901,893</b>



**Table A7. Top 50 Industries Impacted by HHI Tourism**

	Industry	Output
1	Non-hotel accommodations	\$807,597,480
2	Full-service restaurants	\$481,808,252
3	Other real estate	\$184,932,587
4	Miscellaneous store retailers	\$184,899,693
5	Fitness and recreational sports centers	\$182,488,285
6	Transit and ground passenger transportation	\$127,765,129
7	Owner-occupied dwellings	\$117,721,364
8	Water transportation	\$113,547,739
9	Hotels and motels, including casino hotels	\$99,855,058
10	Food and beverage stores	\$96,549,029
11	Scenic and sightseeing transportation and support activities for transportation	\$94,733,851
12	Museums, historical sites, zoos, and parks	\$81,425,303
13	Personal care services	\$55,360,322
14	Performing arts companies	\$46,764,182
15	Other amusement and recreation industries	\$39,575,925
16	Other local government enterprises	\$35,144,058
17	All other food and drinking places	\$34,555,753
18	Monetary authorities and depository credit intermediation	\$34,373,087
19	Management of companies and enterprises	\$32,290,629
20	Insurance agencies, brokerages, and related activities	\$29,559,500
21	Legal services	\$28,042,044
22	Employment services	\$26,227,830
23	Nonstore retailers	\$25,573,272
24	Services to buildings	\$24,097,285
25	Limited-service restaurants	\$23,914,117
26	Offices of physicians	\$23,707,668
27	Securities and commodity contracts intermediation and brokerage	\$21,799,352
28	Management consulting services	\$21,035,158
29	Advertising, public relations, and related services	\$20,292,263
30	Other financial investment activities	\$18,215,169
31	Accounting, tax preparation, bookkeeping, and payroll services	\$16,945,483
32	Maintenance and repair construction of nonresidential structures	\$16,303,522
33	Nondepository credit intermediation and related activities	\$14,208,414
34	General merchandise stores	\$12,849,479
35	Automotive repair and maintenance, except car washes	\$12,831,984
36	Tenant-occupied housing	\$12,698,137
37	Landscape and horticultural services	\$12,068,274
38	Internet publishing and broadcasting and web search portals	\$11,404,456
39	Postal service	\$11,384,978

*Impact of Tourism in HHI on Beaufort County, 2023*

	Industry	Output
40	Electric power transmission and distribution	\$10,588,935
41	Waste management and remediation services	\$10,509,716
42	Travel arrangement and reservation services	\$10,448,081
43	Hospitals	\$10,341,644
44	Gasoline stores	\$9,594,428
45	Insurance carriers, except direct life	\$9,149,583
46	Building material and garden equipment and supplies stores	\$9,041,051
47	Clothing and clothing accessories stores	\$9,039,248
48	Truck transportation	\$8,908,954
49	Car washes	\$8,597,883
50	Radio and television broadcasting	\$8,520,030

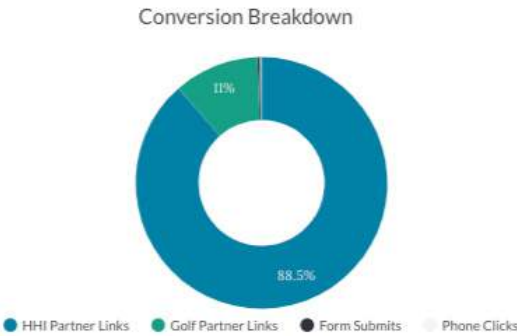
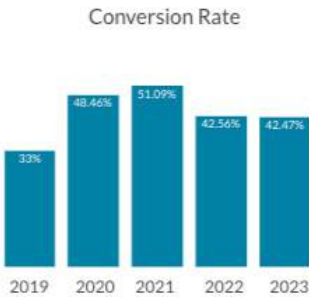
## **VERB INTERACTIVE**

2023 Digital and Social Media Marketing Recap

# HILTON HEAD ISLAND PROPER

## CONVERSION RATE OVERVIEW

- Compared to 2022, our overall conversion rate remained flat.
- The majority of conversions are outgoing links to partners (88.5%), Golf accounts for 11% of conversions. Form Submits and Click to Call actions drove 0.48% between the two.

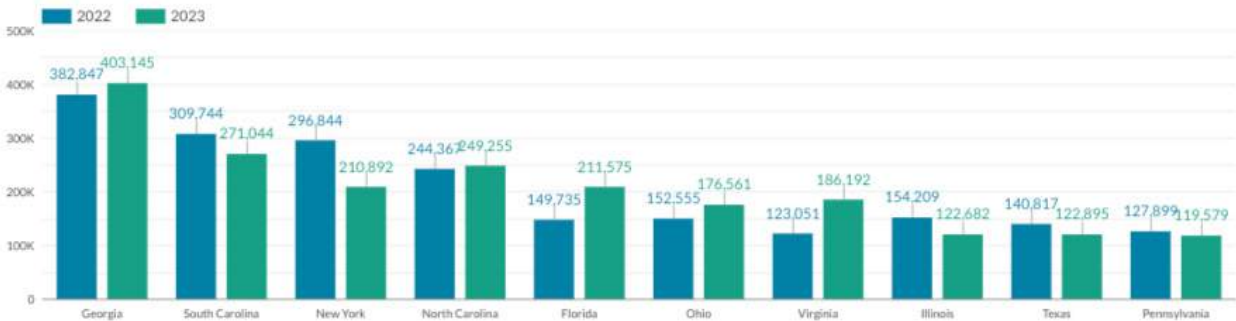


# HILTON HEAD ISLAND PROPER

## DMA

- In 2023, the top 10 DMA traffic remained fairly steady compared to the PY. The top 5 DMAs drive 64% of all traffic to the website. We saw the largest YoY decreases from New York and Illinois. However we increased traffic by +41% for Florida and +51% Virginia.

### Top 10 Markets





## HILTON HEAD ISLAND PROPER

### PAGE PERFORMANCE

- Other than the homepage, the See & Do page is the most popular page by pageviews. After the See & Do page, Offers page comes close to with total pageviews equalling 431,209

#### Top Pages

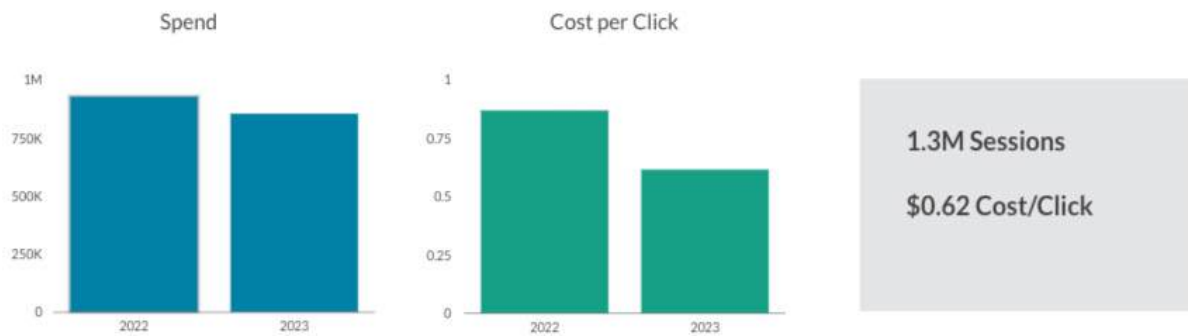
	Page path and screen class	Pageviews	% of Total Pageviews	Avg Session Duration	Bounce rate
1.	/	999,948	19%	01:25	41.23%
2.	/see-do	485,789	9%	01:05	50.29%
3.	/offers/hilton-head-island-escapes	431,209	8%	01:19	53.11%
4.	/stay/hotels-inns-resorts	213,315	4%	02:58	52.88%
5.	/events	134,130	3%	01:56	49.44%
6.	/stay	115,371	2%	01:11	57.71%
7.	/taufuskie	113,577	2%	01:13	43.81%
8.	/stay/vacation-homes-villas	97,933	2%	02:42	60.46%
9.	/see-do/beaches	95,468	2%	01:47	78.09%
10.	/golf/golf-courses	88,521	2%	02:35	46.32%
11.	/golf/golf-getaway	71,426	1%	01:25	32.79%
12.	/hilton-head-island-airport	61,363	1%	01:00	39.11%

## HILTON HEAD ISLAND PROPER

### GOOGLE PAID METRICS

- Comparing 2022 and 2023, the cost per click decreased from .87 to .62 cents. Under \$1 CPC is under the average benchmark. These ads drove over 1.3M users to the destination website.

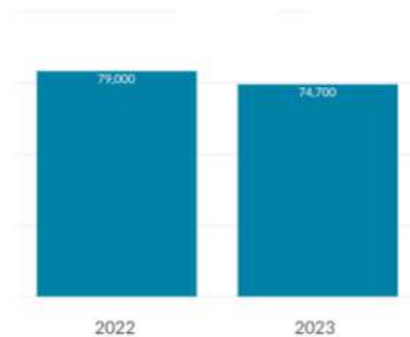
This data includes HHI, HHI Co op, and SCRPT (when applicable).



## HILTON HEAD ISLAND PROPER

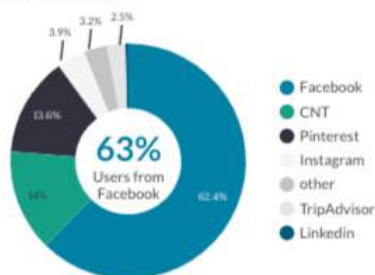
### SEARCH INTEREST

- In 2023, global monthly search volume decreased slightly by 5.4% vs PY. Search interest reached a peak in late June and the first week of July.
- Top terms used to search for Hilton Head Island were hilton head, hilton head island, hilton head weather, hilton head south carolina, hilton head island sc, hilton head hotels, hilton head resorts, hilton head golf courses, and things to do in hilton head.



## HILTON HEAD ISLAND

### SOCIAL TRAFFIC



- Facebook is the key driver for the majority of the social traffic to the website, accounting for 63% of the social sessions.
- We saw an overall decrease in Facebook sessions with Pinterest and Instagram showing relatively same volume

### Social Traffic Engagement

	Social Network	Sessions *	% Sessions of Total	Pages / Session	Avg. Session Duration
1.	Facebook	25,795	62%	10.31	07:14
2.	CNT	5,777	14%	1.03	00:23
3.	Pinterest	5,634	14%	28.51	19:45
4.	Instagram	1,625	4%	7.61	10:24
5.	other	1,311	3%	51.00	10:42
6.	TripAdvisor	1,050	3%	15.44	04:05
7.	LinkedIn	163	0%	1.34	02:06

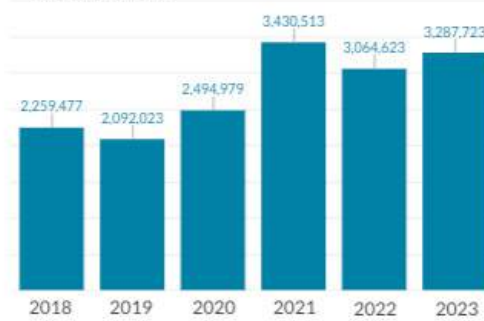
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## HILTON HEAD ISLAND PROPER

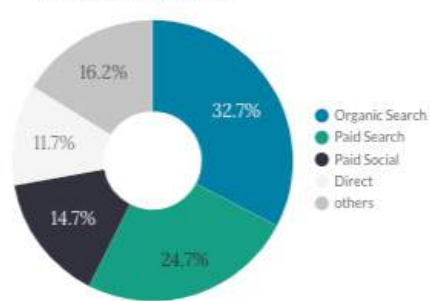
### TOTAL WEBSITE VISITATION

- In 2023, there were 3.28M 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 increased by +7.27% 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.

Website Visits



Visitors by Channel



# **WEBER SHANDWICK**

2023 Public Relations Recap







### The 21 Best Wellness Retreats in the U.S.

#### Hilton Head Health: Hilton Head, South Carolina

Hilton Head Health offers vacations with a purpose. With wellness education, fitness classes, a rejuvenating spa, beaches and gourmet dining. The property's holistic approach to better health equips guests with the knowledge to continue the plan once they return home. During your stay, you'll work with trainers, coaches, dietitians and counselors to gain a new perspective on living a healthy lifestyle. These steps to well-being include increased mobility, a nutritional meal plan, meditation and other ways to achieve longevity. And you can plan to stay for just a few days – or a week – to reach your goals. The property also offers weight loss retreats with an all-inclusive residential stay and an extended four-week comprehensive LowFest program. Guests can reserve accommodations at the new on-site 30-room Lowcountry-inspired Seagrass Inn or book a one-, two- or three-bedroom private villa.

## woman's day

### 14 Best Women's Wellness Retreats to Nurture Your Mind and Body in 2024



8

Hilton Head Health on Hilton Head Island, South Carolina

Hilton Head Health is situated on Hilton Head Island, which is famed for its incredible beaches, world-class golf courses, and Southern charm. Hilton Head Health offers three different wellness retreat programs for women to enjoy:



### DIY Wellness Retreat: A Treat for Your Mind and Body at Home

WebMD reached out to experts at Hilton Head Health, a renowned wellness resort in Hilton Head, SC, for tips on re-creating the wellness retreat experience at home.

Anne Poirier, director of behavioral health at Hilton Head Health, defined self-care as any activity you do on purpose to preserve or improve your physical, emotional, or mental health. "Taking time to listen to what your body and mind need – and then *taking action* on that – is what self-care is all about," said Poirier, noting how it eases stress, increases energy, and improves mood.

## Southern Living

### The Best Off-Season Trips To Plan Now



#### Hilton Head Island, South Carolina

Everyone dreams of ice cream cones and long bike rides on sunny summer days on this resort-ready island but the best time to visit isn't actually in the dog days of summer. Instead try April or May (right before school lets out) or September or October (right after its back in session). You'll still enjoy mild temperatures and everything the beloved beach town has to offer.

## TRAVEL+ LEISURE

Charleston, South Carolina, to Savannah, Georgia

### 10 of the Best U.S. Road Trips for Families



Explore two popular southern cities on one trip with this short-distance getaway. The drive from Charleston straight to Savannah takes just under two hours, but well worth the drive, taking a few stops for this itinerary so you can stop to enjoy the surrounding hotels and beaches along the way. You can stay at The Sanctuary on Hilton Head just an hour south of Charleston, or skip the time for a beach day at Hilton Head, which is only an hour further. Once you've soaked through Savannah, drive and coast back south for a day at The Ocean at Sea Island. This four-day route is another good option for families, with plenty of swimming, hiking, and nature walks.

## Southern Living

### The Best South Carolina Beaches For A Relaxing Lowcountry Getaway



#### 01 Hilton Head Island of 15

Hilton Head looks like a perfect beach town, with its soft, white sand and turquoise water. It's also one of the best places to visit in South Carolina, with its historic charm, excellent golfing, and Carolina beaches. You might even recognize it as having been awarded the title of South's Best Beach. Located on the coast, which is located near the Hilton Head's best beach, Hilton Head has "beach" as a collection of gated neighborhoods surrounded by beautiful, unspoiled, and picturesque island life. These beaches are bordered by 60 miles of coastline, and boasting clusters of markets, golf courses, and more than 250 restaurants. Doesn't sound like a bad trip?

READ OUR HILTON HEAD

## VOGUE

### The Best Bachelorette Party Destinations: 15 Places for the Ultimate Bridal Party Trip

Hilton Head Island, South Carolina



Hilton Head proves that the best bachelorette weekends are often the unexpected ones. Consider an oceanfront Airbnb rental, so you can spend your days soaking up the sun. Later, indulge in a wine-tasting experience at Island Winery, or grab a bite at a local eatery. Don't forget: Before going home, make a final stop at President's Dining Bar for a digestif and live music. —J.C.

## THE POINTS GUY

### Hilton Head for families: What to do and where to stay



With wide, sandy beaches, gentle surf and modern vacation amenities, Hilton Head Island, South Carolina, is one of the top beach destinations for families.

Hilton Head Island is less than 100 miles away, but it's a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer.

Parents will love the island's many amenities, including its beaches, parks, and schools. Hilton Head has a great location, too. It's just what you need for a family vacation.

Locally owned and operated, Hilton Head is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer.

## BEST LIFE

### The 11 Best Adults-Only All-Inclusive Resorts in the U.S.

LEAVE YOUR KIDS AND YOUR WORRIES AT HOME WHEN STAYING AT THESE PLACES.

When it comes to a family trip, there's nothing more relaxing than a beach vacation. Hilton Head Island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer.



## THE TRAVEL

Hilton Head Island, South Carolina



### These Are The 10 Most Less-Crowded US Destinations You Should Visit This Fall

Hilton Head Island is one of the best places to visit in the U.S. for the fall. The island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer. The island is a beautiful island with a lot to offer.

## TOWN&COUNTRY

### The 40 Best Beaches on the East Coast

Hilton Head Island, South Carolina



While Hilton Head Island features a variety of beautiful beaches, including the popular Folly Beach, keep in mind that a few are private. Find free parking at Coligny and Mitchellville, and paid parking at many other spots. With warm, clear water and white sand, these beaches seem almost tropical.

## TRAVEL+ LEISURE

### 11 All-inclusive Resorts Perfect for a Girls Trip

#### 04 Hilton Head Health of 11

Located on idyllic Hilton Head Island, guests at this wellness resort can enjoy a handful of amenities. Between soaks in the hot tub and services at the spa, you and your girlfriends can take cooking demos, sign up for dance classes, go kayaking, or practice pickleball. When it's time to refuel, head to the on-site restaurant and enjoy dishes like lobster tacos, flatbreads, quiches, and even cupcakes. When your day is done, you can retreat to your room at the Sweetgrass Inn, or choose one of the private cottages or villas for even more space.

## Parents

### 11 Best Family Beach Towns for Your Next Vacation



#### 1. Hilton Head Island, South Carolina

**Oceanfront Fun** You can't really go wrong with any of Hilton Head's 12-plus miles of white-sand beaches. "Driessen Beach and Islanders Beach parks are particularly good choices for families because they also have playgrounds and picnic shelters," says Steve Riley, town manager. While you'll probably spot tiny ocean critters, sea-turtle nests, or even dolphins at any of the beaches, Driessen Beach's wooden boardwalk actually takes you over a tidal marsh and sand dunes, so it's home to the most creatures. And Coligny Beach Park, which has a splash fountain, also stands out for its shallow, calm water. "You'd have to walk out 30 yards for it to get above 3 feet deep," says Riley. On the other side of the island, don't miss the candy-striped lighthouse—it's a manageable 114 steps to the top—in the Harbour Town area.

## TRAVELPULSE

### 2023 Travel Guide to the United States

#### Best Places for Couples

##### Hilton Head Island, South Carolina

There are tons of fun, relaxing and romantic things for couples to do on South Carolina's Hilton Head Island, a treasure of the Lowcountry. The island boasts miles of gorgeous and pristine beaches and even opportunities to view dolphins in the wild. Couples can sample some of the best dishes in the region, partake in local wine tastings and perhaps book a rejuvenating couples massage at one of the destination's many excellent spa resorts.



## OUTDOORS WIRE

### Celebrate National Lighthouse Day with these 20 US lighthouses

#### Hilton Head Island, South Carolina

**Climb** 114 steps to the top of this candy-striped tower for island views.

## redbook

### The Best Road Trips from Florida



#### 6

##### Hilton Head, South Carolina

**Hilton Head** is a beautiful island town located in the Lowcountry region of South Carolina. It is known for its stunning beaches, world-class golf courses, and upscale resorts. While there's golf, other activities include boating, fishing, hiking, and simply sunbathing on the beach with a margarita in hand. This is a mandatory stop for wedding lovers as romance is freshly caught here before it is served to your table. With many hotels, travelers also enjoy beachfront properties equipped with full kitchens to feel right at home.



### Where to Go on the Perfect South Carolina Lowcountry Vacation

#### Beaches, Golf, and More on Hilton Head Island



©2 View of Hilton Head in South Carolina, showcasing Driessen Beach (Hilton Head Island)

Many people view **Hilton Head** as a world-class family beach vacation spot and golf destination, but there's much more to do while on island time. You can soar to new heights and catch panoramic views from above with a parasailing flight at **USC Sports**, or take the **Gullah Heritage Trail**, a fascinating journey of Gullah heritage that shares the region's history and stories of the West African-based culture. There's also **The Gullah Museum of Black Island** to visit.

## THE POINTS GUY

### The 10 best road trips to take with your family this summer

#### The South Carolina coast



Coligny Beach Park, Hilton Head Island, South Carolina. (HILTON HEAD TOWN)

Start in Hilton Head Island and catch some rays at the popular Coligny Beach Park, or if you like a quiet scene, try Alder Lane or Barkley Beach.

Learn about South Carolina Lowcountry and Gullah history and culture at the Coastal Discovery Museum and enjoy the area's natural beauty at the Pinckney Island National Wildlife Refuge and Sea Pines Forest Preserve.

Later, slow down on authentic Gullah cuisine at Ruby Lee's, or enjoy seafood at Sea Creek Seafood. Book a night at an airport-filled beach resort like Omni Hilton Head. Oceanfront Resort (from \$200 per night), or if you have Marriott Bonvoy points to burn, check out the Westin Hilton Head Island Resort & Spa (from \$239 or 40,000 points per night).




# BAZAAR

## Try These Affordable Summer Getaways In The US

Enjoy your vacation without shattering the bank.

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Hilton Head, South Carolina



Whether travelers are looking to enjoy the island's natural beauty, relax, or sample Lowcountry fare, Hilton Head Island and its abundance of sun-filled excursions allow for an accessible domestic island getaway that won't break the bank. Palmetto Inn & Suites and Cannery by Marriott Hilton Head are affordable and quality options for accommodations.

For waterfront views and local history, dine at Hudson's on the Docks, a waterfront restaurant which is one of the only two remaining local fishing docks on the island that brings in fresh caught seafood from the docks to the table. Point a Lighthouse or many hotels provide one for you to navigate 60 miles of trails and hidden routes in the Lowcountry.

Travelers can also do good and volunteer with Oyster Reclamation where volunteers recycle used oyster shells to restore the mud shores near the island's Shelter Cove Marina. The reef acts as a home to 150+ species!

# Fodor's Travel

## 12 Classic American Summer Towns That Are Also Perfect Winter Escapes



Hilton Head Island

Hilton Head Island is a great summer getaway—but this spot can also serve as a charming, less crowded winter escape. In the chillier months, the island's natural beauty shines bright alongside the festive holiday lights. The Historic Holidays on Hilton Head Island allows visitors to support local authors and artists while also doing the double deed of shopping for unique holiday gifts.

At the annual Deck the Halls, A Christmas Boat Parade, enjoy the spirit of the season as the waterfront neighborhood transforms into a spectacular holiday celebration. Active explorers can rent bikes and explore on two wheels, traversing the 60 miles of multi-use trails that are emptier in the off-season. Or, embark on one of the island's many dolphin tours to encounter one of the island's most chatty inhabitants, the bottlenose dolphin, since these playful creatures can be spotted year-round. Be sure to visit Hudson's on the Docks, a waterfront restaurant known for its fresh and locally sourced seasonal seafood. One of the island's many festive beachfront resorts can be a great place to spend the night—including Seash House. Somerset Resort Hilton Head or Vestin Hilton Head Island Resort & Spa, all of which each offer easy proximity to the island's dozen miles of surf and sand.

# redbook

## Check Out These Underrated Spring Break Destinations

12  
Hilton Head Island, South Carolina




Known to avoid class golf courses, beautiful beaches, nature preserves and renowned historical sites, Hilton Head Island is a romantic coastal destination one hour from Lowcountry adventures. For spirited enthusiasts, you may just try some of the freshest dishes you've ever tasted.

Where to Stay: Point House Hilton Head Island features rooms with ocean views, a loggers style pool and live events at the tiki bar. It's the only beachside bar on the entire island.

# TRAVELPULSE

## Hilton Head Island: Golf Traveler's Paradise, Foodie Traveler's Delight



### Golf Traveler's Paradise

Golf in America is the ultimate vacation. Hilton Head Island, in the heart of the Lowcountry, is home to 16 world-class golf courses. Whether you're a seasoned golfer or a beginner, there is a course suited to accommodate your needs and style.

16 courses, world-class amenities and daily island fun await at Hilton Head Island. Located in the heart of the island, the Point House is a historic 18th-century plantation house that has been transformed into a luxurious resort. The resort features a mix of historic and modern architecture, including a golf clubhouse and a challenging golf course. The resort is also home to a variety of other amenities, including a spa, a pool, and a restaurant.

## Parade

Happy International Women's Day!  
13 of Our Favorite Female Chefs  
Share Their Go-To Off-Duty Meals

[Orchid Paulmeier](#)

Owner, founder, and chef at [One Hot Mama's](#), Hilton Head, South Carolina

"My dish is 'Filipino Fried Rice' or Tapsilog. I learned from my dad and Lola Virgie (she knew how to stretch a meal—she had 10 kids) how to make it through straight repetition. I had it at least once a week! We would take the Filipino house staples: day-old rice, leftover protein (not enough to be a meal by itself), onions, garlic, and of course, season with garlic salt and black pepper. If we had the extra ingredients, it was served with a fried egg on top and sliced tomatoes. As an adult, it soon became the standard in my house as no one wanted to eat BBQ after working in the restaurant all week. Because my three kids grew up on it, they now crave it while they are away at college. Always quick and easy by using all the leftovers in the house, and a reminder of our Filipino Heritage."



Hilton Head Island: Golf Traveler's Paradise, Foodie Traveler's Delight

## Foodie Traveler's Delight

When dining on vacation, you want each meal to be memorable, you want to savor the flavors and carry them home with you.

Hilton Head Island has a plethora of delicious eateries, with seafood spots of course dominating the scene. After all, when you're by the water, you want that fresh catch.

Hudson's Seafood House on the Docks, an acclaimed seafood restaurant is located on the waterfront, is known for its fresh catch options, the seafood favorites, and Lowcountry-style dishes. Hudson's is also one of the best restaurants to catch the sunset. Dining with sunset views is a must when visiting Hilton Head Island.



Sunset dinner at Hudson's Seafood House on the Docks in Hilton Head Island, South Carolina (photo by Eric Bowman)

## 2023 MEDIA MENTIONS

\*Represents 2023 calendar year mentions

PRINT/ONLINE

1,430 MENTIONS

6,138,422,879

IMPRESSIONS

\$2,862,512.36

AD VALUE

BROADCAST

708 MENTIONS

238,538,080

IMPRESSIONS

\$18,165,638.07

AD VALUE

TOTAL

2,138

MENTIONS

6,376,960,959

IMPRESSIONS

\$21,028,150.43

AD VALUE









**HILTON HEAD ISLAND**  
SOUTH CAROLINA