



2026 DMO ANNUAL PACKAGE

**HILTON HEAD
ISLAND**

SOUTH CAROLINA

BUDGET

ARTICLE 5.II

BUDGET REQUIREMENTS

	VCB TOTAL	TOWN OF HHI DMO	VCB PRIVATE SECTOR	SCPRT FUNDING	TOWN OF BLUFFTON DMO	BEAUFORT COUNTY DMO
REVENUES						
Town of HHI DMO	\$3,700,000	\$3,700,000				
Town of Bluffton DMO	\$340,000				\$340,000	
Southern BC DMO	\$260,000					\$260,000
SCPRT Destination Specific	\$2,000,000			\$2,000,000		
SCPRT Tourism Recovery	\$1,000,000			\$1,000,000		
Private Match Coop	\$2,150,000		\$2,150,000			
Private Sector-Other	\$580,000		\$580,000			
Total Revenues	\$10,030,000	\$3,700,000	\$2,730,000	\$3,000,000	\$340,000	\$260,000
Membership Revenue						\$2,200,000
Total Revenues with Membership	\$12,230,000					

The FY 2026–2027 budget was developed using the 30% (Nonprofit DMO) Budget Form established by the South Carolina Tourism Expenditure Review Committee (TERC).

As a result, this format differs significantly from prior years. The line items shown for FY 2026-2027 include only those funded by the 30% allocation of State accommodations tax (ATAX). Any items not included do not utilize these funds and are therefore not reported on the SC TERC Form, consistent with standard reporting practices.

Additionally, prior-year budgets and year-to-date (YTD) spending are not directly comparable to the FY 2026–2027 budget. In previous years, these line items were supported by a mix of funding sources, with final allocations determined at the end of the fiscal year. For FY 2026–2027, these items will be funded exclusively by State ATAX dollars, and comparisons should be viewed in that context.

YTD spending reflects total expenditures for these line items, as the portion allocated to State ATAX is not finalized until the end of the fiscal year.



BUDGET FORM

Name of Government: Town of Hilton Head Island
Contact Person: Ariana Pemice
Phone: 843-341-8366
Email: apemice@hiltonheadisland.org
Name of Organization Designated to Receive Special Fund: Hilton Head Island & Bluffton Chamber of Commerce/ Visitor & Convention Bureau

30 Percent (NONPROFIT DMO) Budget Form (Adopted October 14, 2022)

Project Category and Brief Explanation				GL Code	Amount Budgeted for 25-26	ACTUAL Spent for 25-26	Amount Budgeted for 26-27
1 - Advertising (Print, digital, broadcast, social, etc.)							
	1.a. Media Buys	exp: Smithsonian Magazine, Conde Nast Traveler, Garden & Gun, Southern Living		6460-200	\$ 488,546.00	\$ 1,132,526.00	\$ 240,000.00
	1.b. Golf Marketing	Golf microsite, digital promotion (digital ads and social ads), print partnerships, public relations, email		6479-200	\$ 135,981.00	\$ 63,415.00	\$ 100,000.00
	1.c. Digital Agency	Digital agency retainer		6519-200	\$ 67,991.00	\$ 66,666.00	\$ 100,000.00
	1.d. Marketing Strategy & Council	Marketing Strategy & Council		6527-200	\$ 28,556.00	\$ -	\$ 42,000.00
		Destination ads on Google, Meta, Bing		6520-200	\$ 503,871.00	\$ 436,594.00	\$ 750,000.00
		Digital agency retainer		6521-200	\$ 61,191.00	\$ 60,000.00	\$ 102,000.00
		Website hosting and updates		6522-200	\$ 40,794.00	\$ 16,063.00	\$ 60,000.00
	1.h. Paid Brand Social Media	Paid advertising exp: Meta, YouTube, Spotify		6525-200	\$ 163,177.00	\$ 210,259.00	\$ 250,000.00
	1.i. International Promotions & Events	Media partnerships exp: Virtuoso, Brand USA, Travel South		7115-200	\$ 105,664.00	\$ 158,238.00	\$ 150,000.00
	1.j. International Tradeshows	Virtuoso, Brand USA, Travel South		7127-200	\$ 67,991.00	\$ 38,002.00	\$ 100,000.00
2 - Promotional Materials/Publications							
	1.a Kennickell	Fulfillment and distribution		6430-200	\$ 81,589.00	\$ 25,777.00	\$ 75,000.00
3 - Marketing support (creative, photography, videography)							
	3.a. Destination Photography	Professional photography for destination marketing		6490-200	\$ 16,996.00	\$ 13,440.00	\$ 75,000.00
	3.b. Zarico	Market level geolocation and visitor tracking		7155-200	\$ 26,782.00	\$ 24,291.67	\$ 28,192.00
	3.c. Placer.ai	Property level geolocation and visitor tracking		7155-200	\$ 52,500.00	\$ 33,390.00	\$ 51,030.00
	3.d. CoIC Reports (Economic Impact, Visitor Profile Study)	Economic Impact Reports, Visitor Profile Studies		7155-200	\$ 21,750.00	\$ -	\$ 10,875.00
	3.e. USCB Event Research for Local Events	Ground level surveying for event attendance and sentiment		7155-200	\$ 15,100.00	\$ 500.00	\$ 15,500.00
	3.f. Keydata Dashboard	Market level lodging KPIs for performance tracking		7155-200	\$ 48,187.00	\$ 47,783.00	\$ 45,360.00
4 - Group Sales & Marketing							
	4.a. National Tradeshows & Direct Planner Engagement	Corporate, Association, Incentive trade shows and partnership events (Exp:MPI, Northstar, Connect Tours)		various	\$ 99,266.00	\$ 105,994.00	\$ 40,000.00
	4.b. SEM Meetings Focused	Paid digital advertising on Google, Bing with Geo-targeting key feeder markets		6886-200	\$ 44,194.00	\$ 37,352.00	\$ 65,000.00
	4.c. Social Media Planner Targeting	Paid social media advertising exp: Meta, LinkedIn campaigns and job life targeting		6887-200	\$ 33,995.00	\$ 33,333.00	\$ 50,000.00
	4.d. Planner Incentive and Conversion Fund	Familiarization (FAM) tours, air support for sites, shoulder season incentives designed to drive closure		various	\$ 1,360.00	\$ 2,380.00	\$ 30,000.00
	4.e. Marketing Collateral, CRM & Website Redesign	Meetings landing page, digital planner, RFP ready collateral, video and digital meeting assets, CRM enhancements		various	\$ 20,398.00	\$ -	\$ 25,000.00
	5.a. PR Strategy, Maintenance & Support	Public Relations Firm Retainer		6950-200	\$ 203,972.00	\$ 200,000.00	\$ 285,000.00
Marketing Total					\$ 2,329,851.00	\$ 2,706,003.67	\$ 2,689,957.00
	7.a. VCB Management - Payroll	VCB management payroll paid by 30% funds					\$ 247,155.00
	7.b. VCB Management - Payroll Taxes	VCB management payroll taxes paid by 30% funds (7%)					\$ 17,301.00
	7.c. VCB Management - 401K Expenses	VCB management 401K expenses paid by 30% funds (6%)					\$ 14,829.00
	7.d. VCB Management - Insurance Expenses	VCB management insurance expenses paid by 30% funds					\$ 9,000.00
	7.e. VCB Management - Operational Expenses	VCB management operational expenses paid by 30% funds by FTE (1.5)					\$ 21,196.00
	7.f. VCB Management - Building Expenses	VCB Management building expenses paid by 30% funds by FTE (1.5)					\$ 14,674.00
	7.g. VCB Support - Payroll	VCB support payroll paid by 30% funds					\$ 250,017.00
	7.h. VCB Support - Payroll Taxes	VCB support payroll taxes paid by 30% funds (7%)					\$ 17,501.00
	7.i. VCB Support - 401K Expenses	VCB support 401K expenses paid by 30% funds (6%)					\$ 15,001.00
	7.j. VCB Support - Insurance Expenses	VCB support insurance expenses paid by 30% funds					\$ 17,250.00
	7.k. VCB Support - Operational Expenses	VCB support operational expenses paid by 30% funds by FTE (2.88)					\$ 40,625.00
	7.l. VCB Support - Building Expenses	VCB support building expenses paid by 30% funds by FTE (2.88)					\$ 28,125.00
	7.m. Communications - Payroll	Communications payroll paid by 30% funds					\$ 95,839.00
	7.n. Communications - Payroll Taxes	Communications payroll taxes paid by 30% funds (7%)					\$ 6,709.00
	7.o. Communications - 401K Expenses	Communications 401K expenses paid by 30% funds (6%)					\$ 5,750.00
	7.p. Communications - Insurance Expenses	Communications insurance expenses paid by 30% funds					\$ 5,400.00
	7.q. Communications - Operational Expenses	Communications operational expenses paid by 30% funds by FTE (0.9)					\$ 12,717.00
	7.r. Communications - Building Expenses	Communications building expenses paid by 30% funds by FTE (0.9)					\$ 8,804.00
	7.s. Finance - Payroll	Finance payroll paid by 30% funds					\$ 133,942.00
	7.t. Finance - Payroll Taxes	Finance payroll taxes paid by 30% funds (7%)					\$ 9,376.00
	7.u. Finance - 401K Expenses	Finance 401K expenses paid by 30% funds (6%)					\$ 8,037.00
	7.v. Finance - Insurance Expenses	Finance insurance expenses paid by 30% funds					\$ 6,300.00
	7.w. Finance - Operational Expenses	Finance operational expenses paid by 30% funds by FTE (1.05)					\$ 14,837.00
	7.x. Finance - Building Expenses	Finance building expenses paid by 30% funds by FTE (1.05)					\$ 10,272.00
Personnel Total					\$ 1,053,000.00		\$ 1,010,657.00
Grand Total							\$ 3,700,614.00

Certification that the Local Accommodations Tax Advisory Committee Reviewed Budgets Submitted and Made Recommendations per Section 6-4-25 of the SC Code of Laws.

(Please type YES or NO below.
If NO, please offer explanation)

Use space below to offer brief explanation of difference between budget and actual expenses or attach supplemental documentation from DMO.

Project Categories - All must attract or provide for tourists.

- 1 - Advertising (Print, digital, broadcast, social, etc.)
- 2 - Promotional Materials/Publications
- 3 - Marketing support (creative, photography, videography)
- 4 - Group Sales Efforts and Tradeshows



HILTON HEAD ISLAND DESTINATION MARKETING PLAN

HILTON HEAD
ISLAND
SOUTH CAROLINA

TABLE OF CONTENTS

EXECUTIVE SUMMARY

It Starts With A Visit	8
Defining Our Cornerstone	10
Visitor Experience Foundations	12
Shared Values	14
Destination Goals	16
Strategic Plan	18
Surveys and Metrics	22
Stakeholder Satisfaction Surveys	32
What's Ahead in FY 2026-2027	34
Destination Public Relations	40
Appendix	46



IT STARTS WITH A VISIT

Millions of people think we're a pretty special place, and we do, too. We believe that balance is critical to our way of life and vital to keeping our tourism-based economy healthy and to resident quality of life.

We are the Designated Marketing Organization (DMO) for the Town of Hilton Head Island. Destination marketing is funded through South Carolina's accommodations tax (ATAX), which is paid by visitors, not residents, and governed by strict state and local regulations. No property taxes or resident-paid taxes are used for tourism marketing.

The Chamber serves as a contracted marketing vendor to the Town of Hilton Head Island, responsible for delivering defined marketing services within an approved budget. Each year, we outline how state ATAX funds will be invested in our annual marketing plan, which is developed with local tourism leaders and reviewed by the Chamber of Commerce Marketing Council, the Chamber of Commerce Board of Directors, Town of Hilton Head Island Accommodations Tax Committee, Town of Hilton Head Island Finance & Administrative Committee, Town of Hilton Head Island Town Council, and the South Carolina Tourism Expenditure Review Committee (TERC).

The FY 2026-2027 DMO Strategic 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

To ensure Hilton Head Island is a welcoming community, focused on 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 community 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 Designated Marketing Organization 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.

OUR SHARED VALUES



Arts & Culture



Ecotourism



History



Recreation



Wellness

VISITOR EXPERIENCE FOUNDATIONS



COASTAL OUTDOORS

Core Values

- Year-round access to nature and outdoor recreation
- Ecotourism
- Sustainability
- Beaches
- Leisure Trails
- Sea Turtle Nesting
- Kayaking & Paddle-boarding
- Nature Preserves & Parks
- Birding & Wildlife Viewing
- Coastal Discovery
- Wellness



GOLF, RACQUET, AND SPORTS

Core Values

- A world-class hub for golf and racquet sports
- Championship Golf Courses
- Golf Events (eg. Kingdom Cup, RBC Heritage)
- Tennis
- Pickleball
- Padel
- Instruction Programs + Academies
- Racquet Events
- Active Lifestyles
- Wellness
- Skateparks
- Gold Level Bicycle Friendly Community



CULINARY + DINING

Core Values

- A diverse and thriving food scene shaped by sea, land and culture
- Local Seafood + Lowcountry Cuisine
- Chef-Owned Restaurants
- Culinary Events + Festivals
- Waterfront Dining
- Gullah-Inspired Cuisine
- Farmers Markets



CULTURE + HERITAGE

Core Values

- A deep sense of place rooted in Gullah history and creative expression
- Gullah Heritage
- Mitchelville Freedom Park
- Native Islander Traditions
- Museums & Public Art
- Performance Arts
- Cultural Tours
- Storytelling
- Mariculture



EVENTS + COMMUNITY

Core Values

- Celebrations that bring the Island's culture and community to life
- Music + Art Festivals
- Food + Wine Events
- Sports Tournaments
- Local Traditions
- Family + Seasonal
- Weddings + Celebrations
- Signature Island Events
- Philanthropy



TRANSLATING OUR SHARED VALUES

ARTICLE 6.I



COASTAL OUTDOORS

Building upon our established positioning in both sustainable tourism and outdoor recreation, we will craft integrated messaging encouraging visitors and residents to adventure responsibly in the great outdoors. Our focus will be on enjoying the Island’s natural beauty while acting as stewards of the land. Leveraging existing assets and activations, including our rich wildlife and general recreation storytelling and imagery, we will position conservation as lifestyle, spotlighting seasonally appropriate activities to inspire visitors to experience the natural beauty of Hilton Head Island, leaving our main message of leaving nothing but your footprints.



GOLF, RACQUET, AND SPORTS

Golf, tennis, and pickleball have all seen a significant surge in popularity in recent years. With growing consumer appetite for active vacations and golf-centric travel, Hilton Head Island is perfectly positioned to capture this demand through storytelling, images, and creative campaigns highlighting the Island’s world-class tennis facilities and booming pickleball scene alongside existing assets that reinforce its status as a premier golf destination. In addition, we will elevate Hilton Head Island’s designation as a Gold Level Bicycle Friendly Community by showcasing its extensive network of leisure pathways, scenic coastal routes, and commitment to safe, accessible cycling, positioning the Island as an ideal destination for both recreational riders and cycling enthusiasts seeking immersive, active travel experiences.



CULINARY + DINING

A core experiential pillar of Hilton Head Island, culinary, and dining represents a major new area of focus. Our approach combines visual and written storytelling, moving beyond a mere directory of the Island’s 250+ restaurants to spotlight Hilton Head Island as a true culinary destination. Utilizing our website, social media, display campaigns, and search engine marketing, we will develop content spotlighting the Island’s sea-to-table dining, unique Gullah cuisine, year-round outdoor dining options, and annual culinary events like the Hilton Head Oyster Festival, Hilton Head Island Seafood Festival, and Hilton Head Island Wine & Food Festival.



CULTURE + HERITAGE

We are dedicated to promoting Hilton Head Island’s unique arts, culture, and heritage by translating traditional historical narratives, including those rooted in Gullah history and culture, into compelling, visitor-focused experiences such as tours, festivals, and live performances. This approach emphasizes bringing the Island’s stories to life in ways that feel engaging, immersive, and relevant to today’s travelers. By leveraging visual storytelling, curated itineraries, and integrated digital and social campaigns, we will further position Hilton Head Island as a premier destination for authentic cultural experiences and meaningful connections to its history.



EVENTS + COMMUNITY

Events & Community represents a prime opportunity to drive year-round engagement, while highlighting the vibrant community behind the destination. Weaving this content into all destination touchpoints, website, digital, social, and beyond, creates a dynamic opportunity for storytelling that changes with the seasons, emphasizing the wealth of diverse festivals, events, and experiences offered while showcasing the one-of-a-kind spirit of the Island’s community.



DESTINATION GOALS

INSPIRING NEW VISITS, NURTURING LOYAL GUESTS, AND CARING FOR OUR COMMUNITY

This year, tried-and-true tactics are augmented with advances in AI optimizations and new technology channels, an attention-grabbing brand campaign, curating targeted content for Leisure Visitors, Meetings, Incentives, Conferences and Events (MICE) and Travel Advisor audiences. Our values are rooted in the community and continue to guide visitors as we continue to connect with what’s best for our destination. and helping them be good stewards of the Island.

GOALS 1-4

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

DESTINATION ALIGNMENT & COMMUNITY ENGAGEMENT
- 2

SUSTAINABLE TOURISM & INFRASTRUCTURE PRESERVATION AND DEVELOPMENT
- 3

REJUVENATE AND ELEVATE THE DESTINATION WITH A FOCUS ON QUALITY OVER QUANTITY
- 4

PRIORITY SALES AND MARKETING INITIATIVES



STRATEGIC PLAN ARTICLE 6.II (b)

HILTON HEAD ISLAND & BLUFFTON CHAMBER OF COMMERCE

2027-2029 STRATEGIC PLAN EXECUTIVE SUMMARY

1 DESTINATION ALIGNMENT & COMMUNITY ENGAGEMENT

Foster Increased Community Support for Tourism
Strengthen Partnerships with Local Government & Industry Leaders
Measure and Monitor Community Sentiment

2 SUSTAINABLE TOURISM & INFRASTRUCTURE PRESERVATION AND DEVELOPMENT

Support Sustainable Infrastructure Growth & Mobility
Enhance Outdoor Recreation Infrastructure
Foster Resident and Guest Culture of Sustainability

3 REJUVENATE AND ELEVATE THE DESTINATION WITH A FOCUS ON QUALITY OVER QUANTITY

Attract a High-Value but Diverse Visitor Mix
Expand Off-Season & Shoulder Season Offering
Integrate Sustainability & Stewardship into Visitor Experience
Strengthen Connections Across the Destination

4 PRIORITY SALES AND MARKETING INITIATIVES

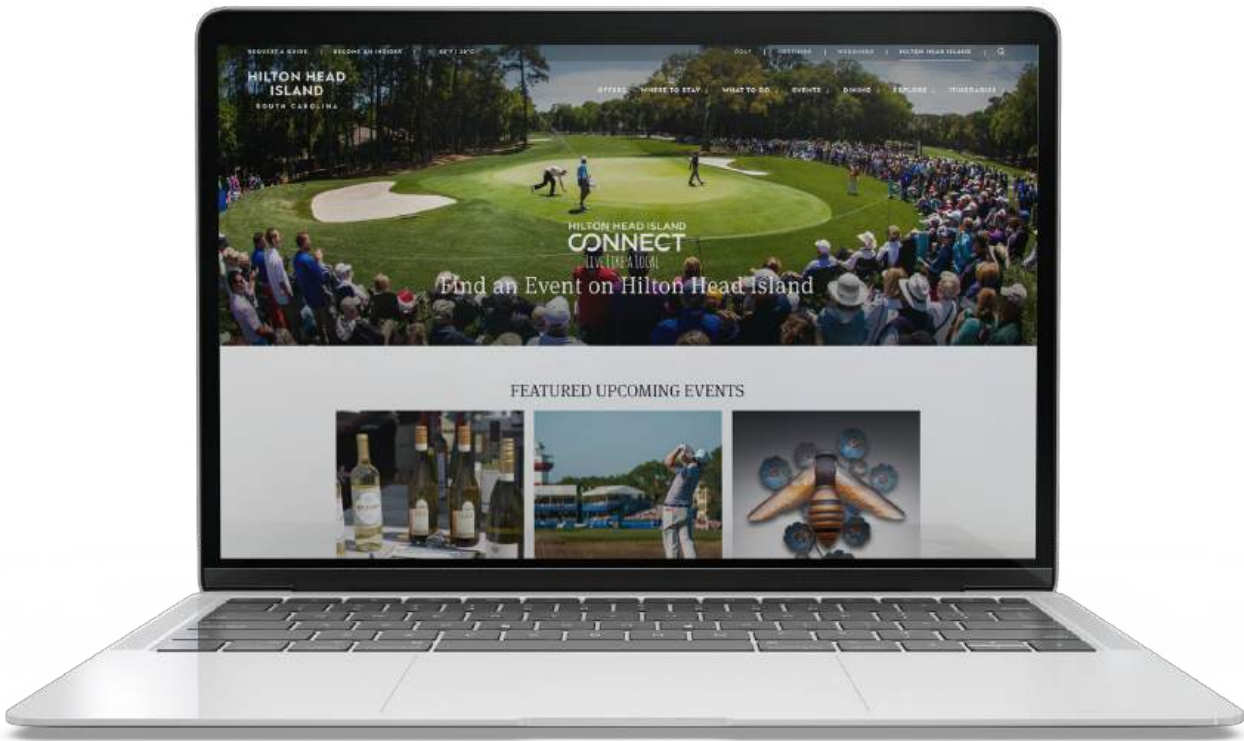
Build a Robust Group, MICE, Leisure, and Weddings Sales Strategy
Focused International Market Research
Leverage Technology & AI to Drive Engagement
Strategic Partnership & Sponsorship Programs
Evolve Owned Media & Co-op Investment Opportunities
Develop a Tactical Sales & Marketing Culture

LOCAL EVENTS

ARTICLE 6.II (C)

HILTON HEAD ISLAND
CONNECTIONS AND EXPERIENCES

We are committed to elevating Hilton Head Island’s vibrant events calendar as a key driver of visitation, community connection, and year-round engagement. Through our Events page, we provide a centralized, always-on platform to promote and amplify local events, ensuring prospective visitors have access to timely, comprehensive information that supports trip planning and enhances the overall visitor experience. This effort is further supported through ongoing organic social media, where we highlight events in real time, extend their reach, and reinforce the Island’s dynamic, experience-driven identity. Together, these channels serve as a foundational ecosystem for showcasing the breadth of events taking place across Hilton Head Island.



In partnership with the University of South Carolina Beaufort, we support on-the-ground event research when requested, providing valuable, real-time insights into attendance, visitor origin, and engagement. These efforts are complemented by Placer.ai reporting, enabling deeper, data-driven analysis of event performance and visitor behavior to inform future strategy and optimize impact.

With a strategic emphasis on driving out-of-market and overnight visitation, we deploy targeted paid media and campaign support behind key demand-driving events. These efforts are designed to extend reach beyond the region, attract high-value visitors, and maximize economic impact. These events include:

- » Hilton Head Island Gullah Celebration
- » Hilton Head Island Seafood Festival

- » Hilton Head Island Wine & Food Festival
- » Hilton Head Island Concours d'Elegance and Motoring Festival
- » Crescendo Celebration of Arts & Culture

Looking ahead to FY 2026–2027, we plan to further strengthen this approach by working closely with the Town of Hilton Head Island and other community partners to identify, and promote new events with strong potential to generate overnight visitation and economic impact. These events may include: The Hilton Head Island Lantern Parade, RBC Heritage, Hilton Head Island Jam Songwriter Festival, and the Juneteenth Celebration. Over the past year, these combined efforts have generated meaningful reach, engagement, and visitation.

Combined, these campaigns drove:

- » 25K visits/session to event landing pages
- » 6K conversions to event partners

	Hilton Head Island Gullah Celebration	Hilton Head Island Wine & Food Festival	Hilton Head Island Seafood Festival	Hilton Head Island Concours d'Elegance and Motoring Festival	Crescendo Celebration of Arts & Culture	RBC Heritage*	Hilton Head Island Jam Songwriter Festival*	Juneteenth Celebration*
2025 Social Impressions	60,081	321,937	143,565	125,897	48,644			
2025 Social Engagements	1,525	11,683	4,992	3,174	2,219			
2025 Social Link Clicks	86	1,552	192	396	566			
2025 Website Views	1,004	12,552	3,425	2,848	5,709			
2025 Website Link Clicks	339	2,537	1,921	688	1,326			
2025 Attendance	2.4K visits	2.5K visits	2.4K visits	2K visits	9.5K visits			
2025 % of Visitors with Origin >50 miles away	37%	65%	37%	43%	49%			
FY 2026-2027 Promotional Budget	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
FY 2026-2027 Research Budget	\$600-\$1200	\$600-\$1200	\$600-\$1200	\$600-\$1200	\$600-\$1200	\$600-\$1200	\$600-\$1200	\$600-\$1200

* Denotes new events that will be incorporated in FY 2026-2027

2025 attendance and origins as reported by Placer.ai. In cases where an event encompassed multiple days or locations, only the marquee event is included. All data is approximate.

Promotional budget includes paid promotion on social media and through digital ads. Rather than being separate line items, the budgets are allocated from the existing budget outlined in sections 1.e and 1.h of the FY 2026-2027 budget form.

Research budget includes on-the-ground event research produced in partnership with the event, the Hilton Head Island & Bluffton Chamber of Commerce, and USC Beaufort. The budgets fluctuate based on the needs of event partners and the scope of the research, and they are allocated from the existing budget outlined in section 3.e of the FY 2026-2027 budget form.

SURVEYS AND METRICS

ARTICLE 6.II (d)



MEASURING WHAT MATTERS, TOGETHER

Guided by Destinations International best practices, we have identified thirteen core metrics to measure performance. Looking ahead to FY 2026–2027, we will introduce additional metrics that reflect the evolving technology landscape, particularly the continued rise of artificial intelligence (AI) and generative search.

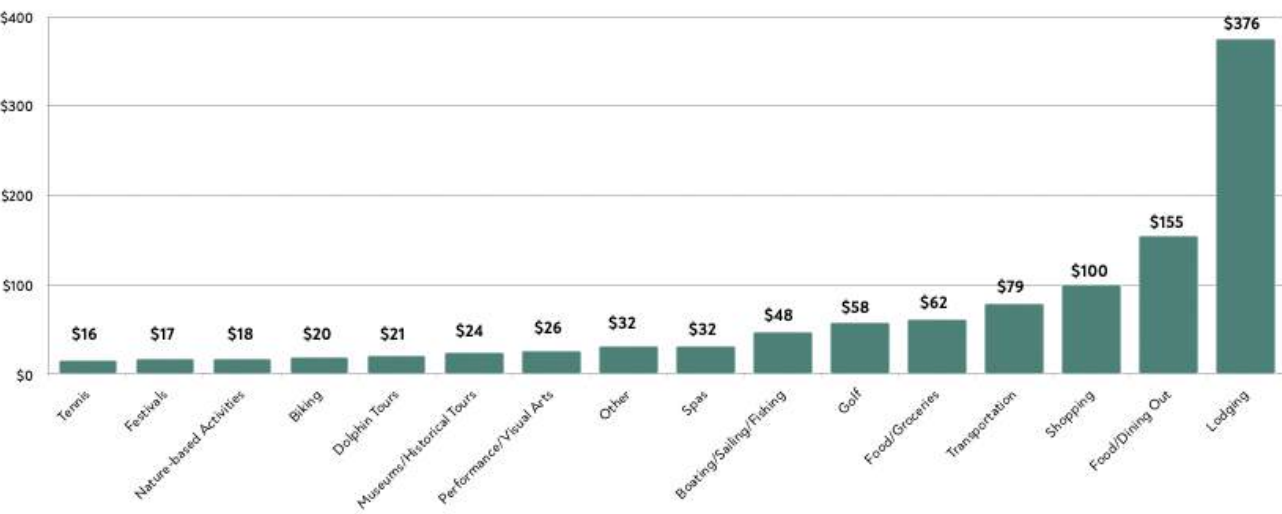
- | | |
|---|--|
| 1. Visitor and resident sentiment | 9. Group sales metrics including number of leads sent to partners |
| 2. Revenue per available room (RevPAR) | 10. Public relations performance (media stories/mentions, impressions, and ad-value equivalency) |
| 3. Occupancy rates for Hilton Head Island and comparisons of occupancy rates with comparable destinations | 11. Jobs supported by tourism |
| 4. Visitor spending and economic impact, including average spend per visitor and by category with comparisons to comparable destinations* | 12. Event attendance and out-of-market participation |
| 5. Return on investment (visitor spending per dollar invested) | 13. Industry recognition and awards |
| 6. Local tax revenues generated by visitors | 14. Referral traffic from AI and generative search platforms as identifiable within available analytics tools* |
| 7. Number of visitors by season and demographic categories, including insights into overnight visitation | 15. Visibility of Hilton Head Island content within generative search results, including presence in AI-generated responses for priority travel queries* |
| 8. Website engagement and referrals to local businesses | |

**Denotes new metrics that will be tracked in FY 2026-2027*

Along with the selected metrics called out later in this plan, the full metrics are published annually in our DMO Metrics Book, which can be found in the appendix. Additionally, the DMO Metrics Book, along with our annual economic impact reports, visitor profile studies, marketing plans (inclusive of budget), and independent audits are published on THINK: Transparency in Tourism Marketing.

AVERAGE SPEND PER VISITOR AND BY CATEGORY

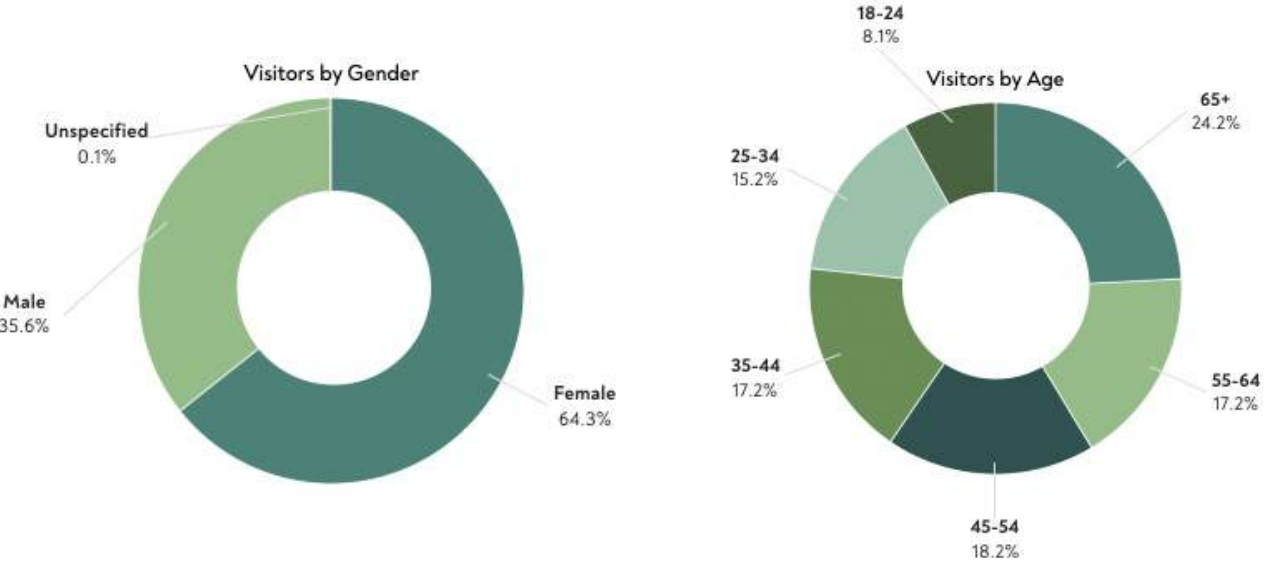
ARTICLE 6.II(d)(i)(1)



Source: 2025 Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina - College of Charleston Office of Tourism Analysis

VISITOR DEMOGRAPHICS BY CATEGORY

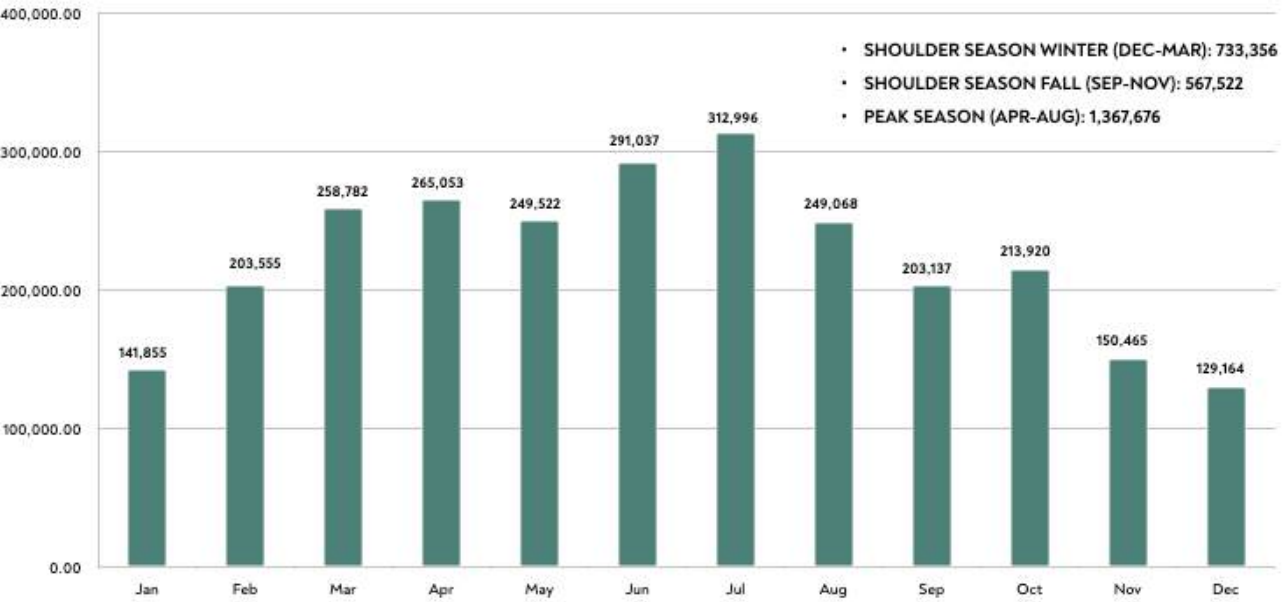
ARTICLE 6.II(d)(i)(2)



Source: 2025 Estimated Total Impact of Tourism on Hilton Head Island on Beaufort County, South Carolina College of Charleston Office of Tourism Analysis

NUMBER OF VISITORS BY SEASON

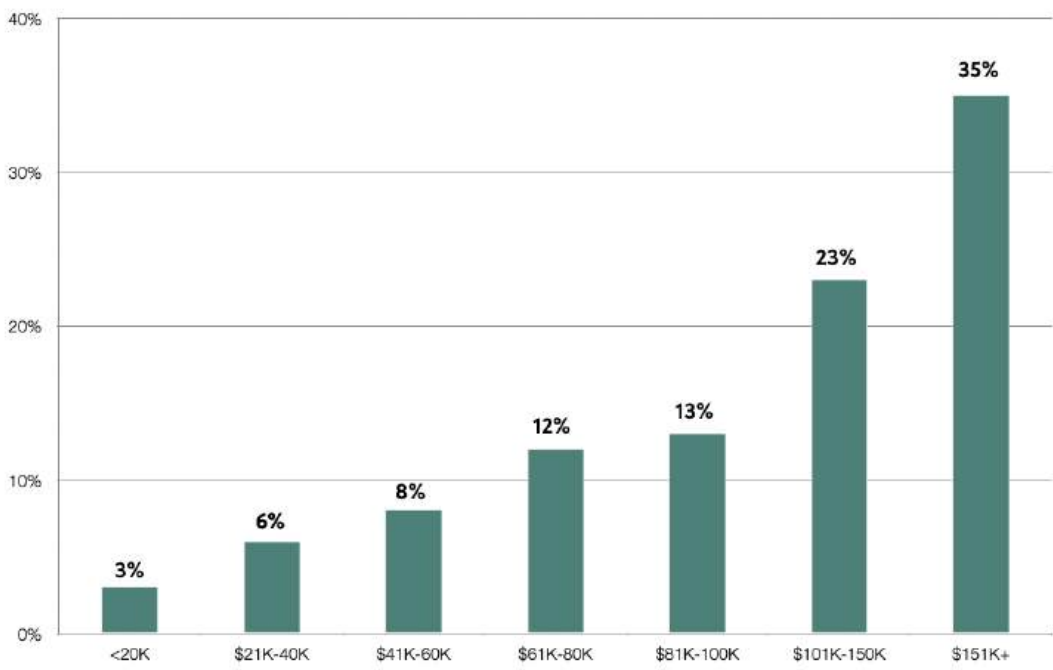
ARTICLE 6.II(d)(i)(2)



Note: This visitor number is inclusive of all visitors. This includes: villa rentals, hotels, timeshares, second homeowners, non-paying guests, and daytrippers. Source: College of Charleston Office of Tourism Analysis

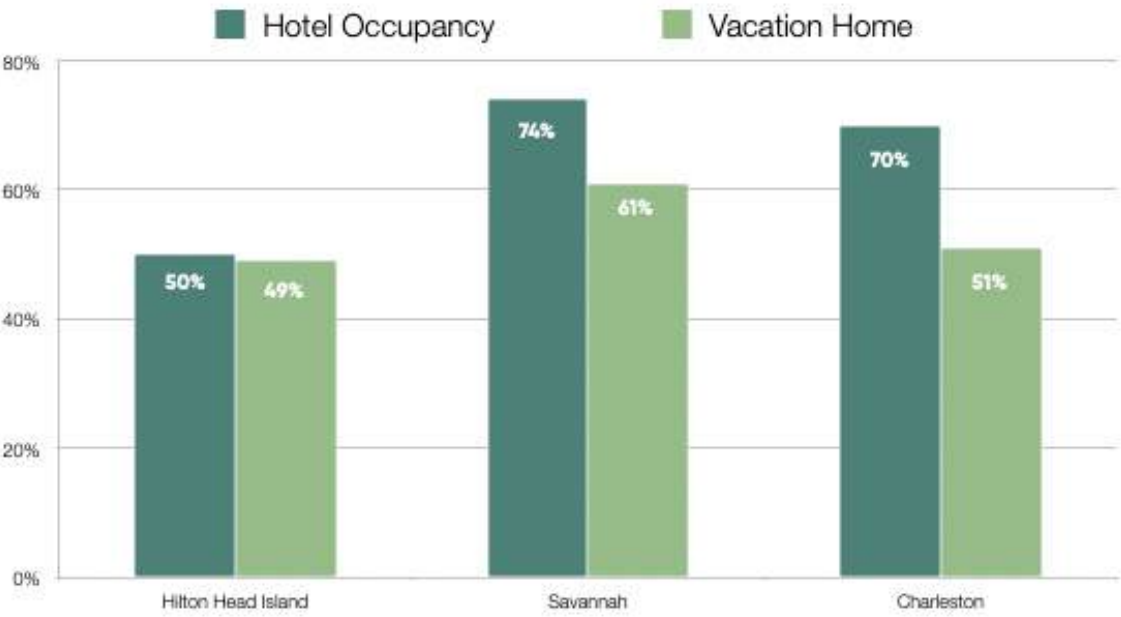
VISITORS BY INCOME

ARTICLE 6.II(d)(i)(2)



Source: 2025 Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina - College of Charleston Office of Tourism Analysis

OCCUPANCY COMPARISON
ARTICLE 6.II(d)(i)(3)



Source: KeyData

GROUP SALES METRICS
ARTICLE 6.II(d)(iii)

LEAD GENERATION (DMO OUTREACH)			
	2026 YTD	2025 Full Year	YOY Pacing
# of Leads	37	63	59%
Room Nights Requested	2,926	6,727	43%
Planner Touchpoints	320	291	110%
New Accounts Created	173	96	180%
Trade Shows Attended	2	12	17%

LEAD GENERATION (DMO OUTREACH)			
	2026 YTD	2025 YTD	YOY Pacing
Definite Groups	12	19	63%
Definite Room Nights	999	1,744	57%
Conversion Rate	32%	30%	

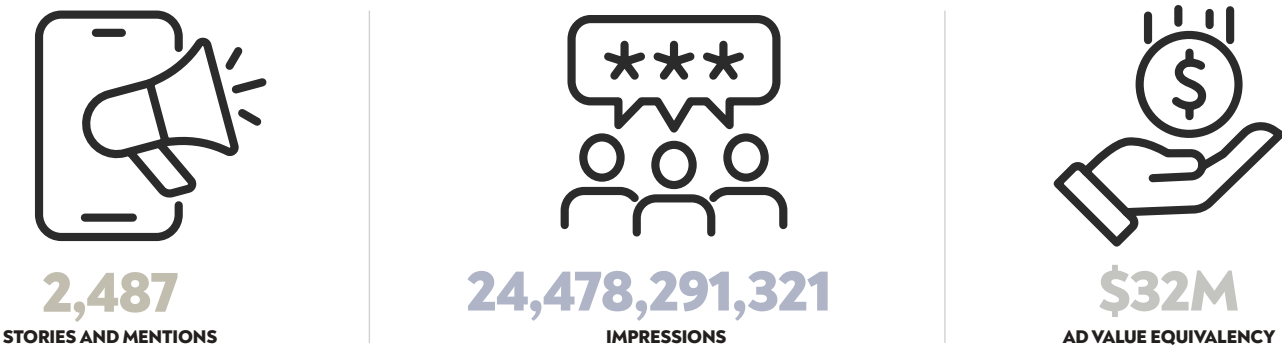
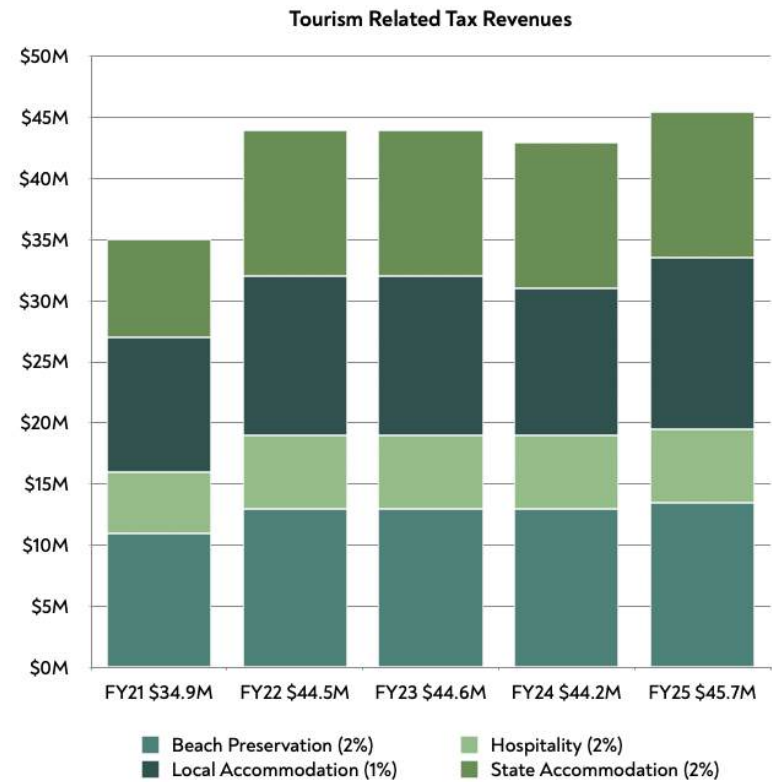
ECONOMIC IMPACT	
DEFINITE 2026	
Total Economic Impact	\$3.5M
Avg Spend per Attendee	\$275

Source: Simpleview CRM
Note: 2026 data reflects performance through March 1, 2026, and should be viewed as early-year pace. 2025 data reflect full calendar year totals. Directional comparisons are intended to show pacing and trends rather than direct year-over-year equivalency. Additionally, a new data tracking process implemented in September 2025 may impact comparability across periods.

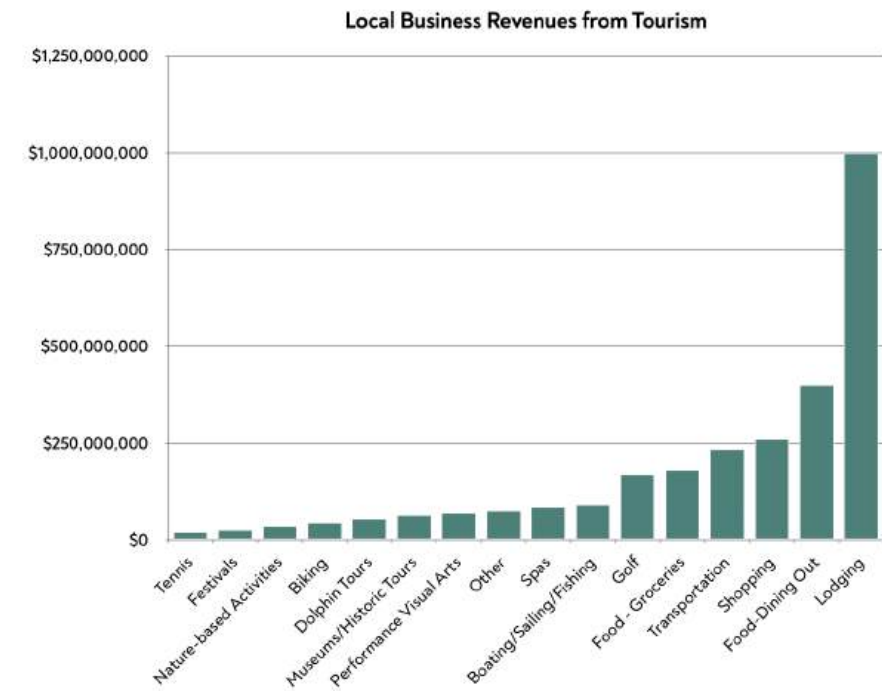
SURVEYS AND METRICS
ARTICLE 6.II(d)(iv)

ECONOMIC IMPACT
ARTICLE 6.II(d)(v)

MEDIA & BRAND AWARENESS METRICS
ARTICLE 6.II(d)(vi)



Source: Cision/Critical Mention

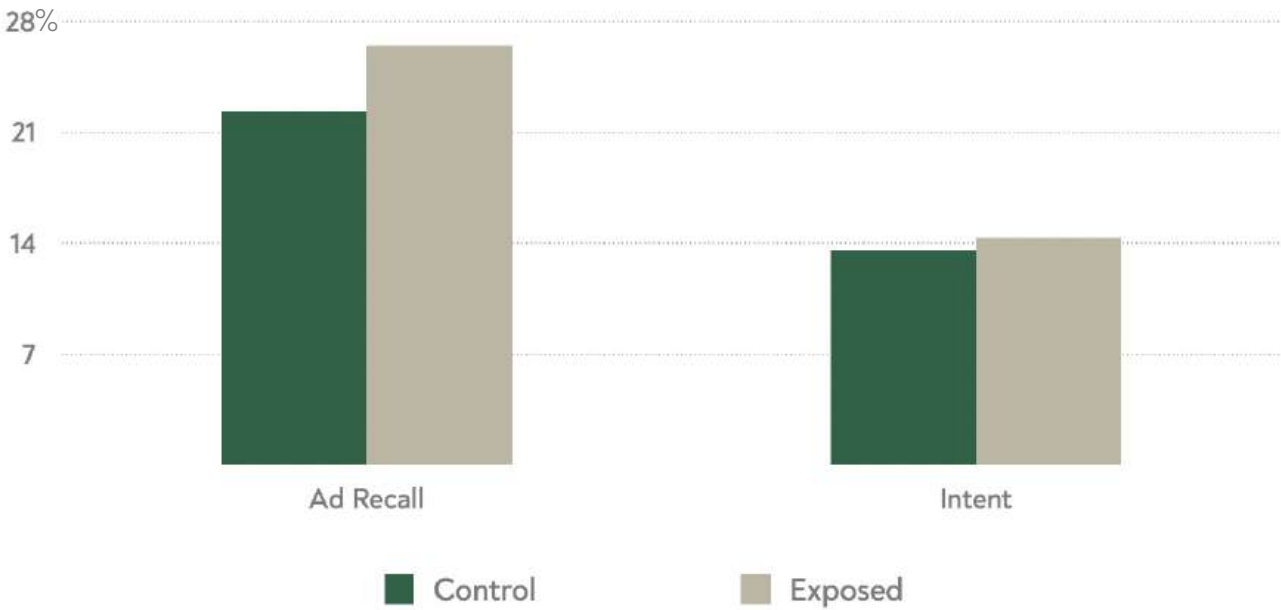
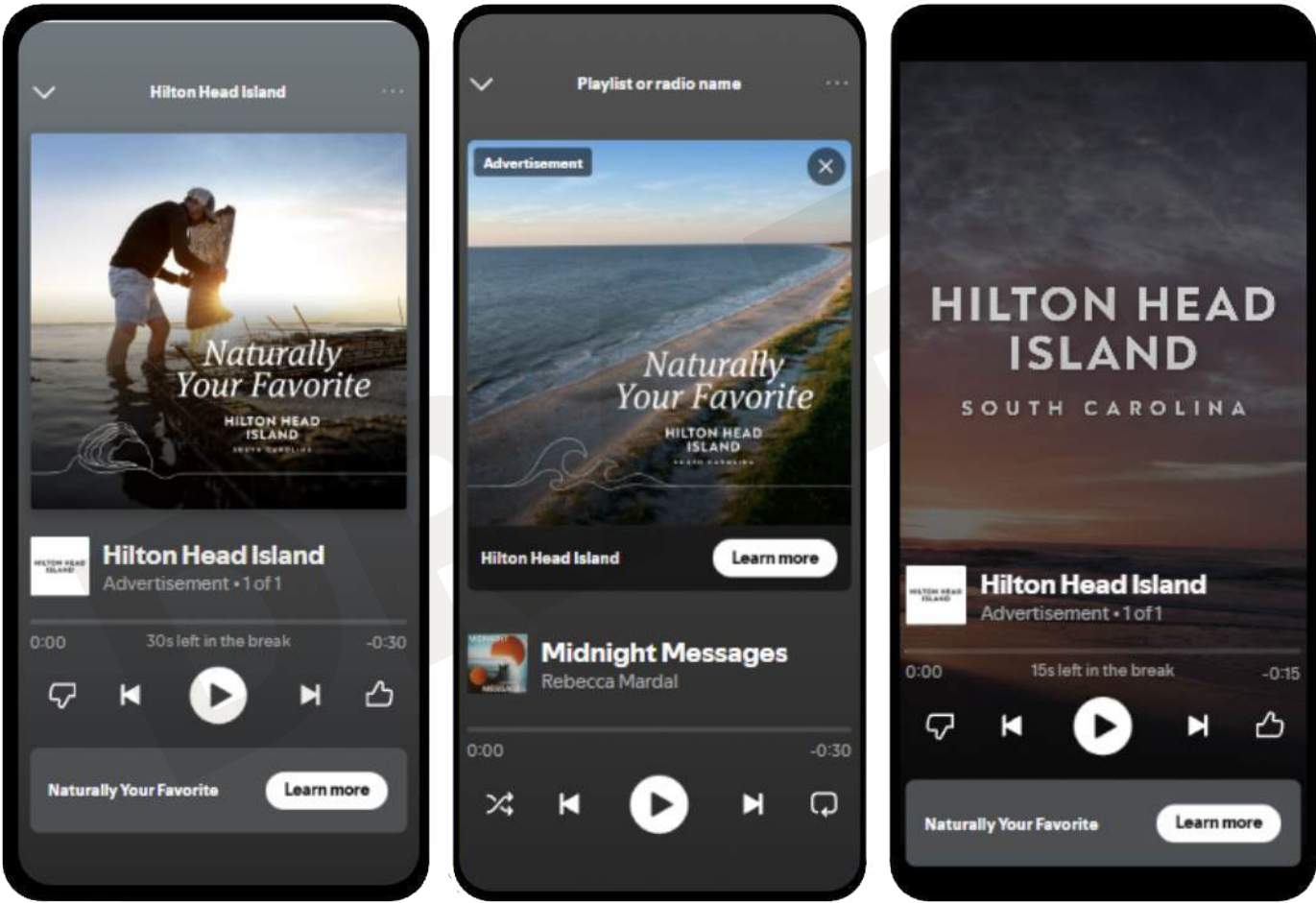


Source: 2025 Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina - College of Charleston Office of Tourism Analysis



BRAND AWARENESS BENCHMARK STUDY RESULTS

The Naturally Your Favorite campaign included a Brand Lift Study through Spotify, with results collected in-app through a three-question survey. The campaign successfully drove a **significant increase** in ad recall and intent.



SEASONAL IMPACT METRICS
ARTICLE 6.II(d)(vii)



Source: KeyData



**STAKEHOLDER
SATISFACTION SURVEYS**
ARTICLE 6.II(d)(viii)

Measuring stakeholder satisfaction is a critical component of our marketing strategy, ensuring alignment with the priorities of Hilton Head Island residents. In partnership with MMGY Travel Intelligence, we conduct and publish an annual Resident Sentiment Survey to assess perceptions of tourism’s impact on the Island. This provides valuable insight to help guide our efforts in a way that reflects community priorities.

In addition, we administer an annual Membership Survey to better understand the needs and perspectives of our business community.

Together, these insights inform our strategic direction, supporting a balanced and collaborative approach that benefits visitors, residents, and local businesses alike.

The full Resident Sentiment Survey and key highlights from the Membership Survey are included in the appendix.

WHAT’S AHEAD IN FY 2026-2027

ADVERTISING

Our advertising strategy ensures we meet travelers at every stage of their journey, while adapting to the rapidly evolving way people search, discover, and plan travel. By optimizing for Generative Engine Optimization (GEO) and traditional SEO, our approach ensures Hilton Head Island remains visible, relevant, and easy to choose.

THE OLD WAY

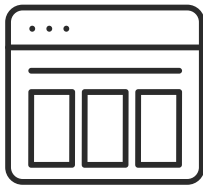


THE NEW WAY



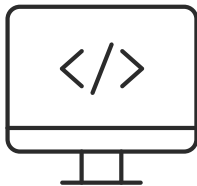
SEO & GEO - LAYING THE GROUNDWORK

A successful data-informed content strategy that will grow the organic search footprint for your brand both on traditional SERPs (Search Engine Results Page) as well as within Generative AI applications can be focused on the following core pillars:



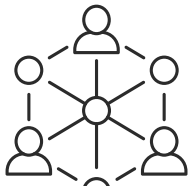
ONPAGE

The optimization and data-informed creation of content will drive increased exposure in search engines leading to better engagement.



TECHNICAL

Ongoing technical audit and comprehensive review of the existing website to ensure current issues in the technical infrastructure are identified.

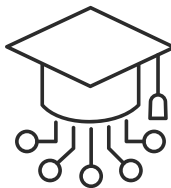


OFF PAGE

Link building through a personalized outreach program, and amplified exposure through influencer outreach and a targeted social media strategy.

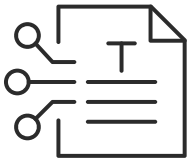
AI AND THE OPPORTUNITY TO SUPPORT AI DISCOVERABILITY

A strong GEO strategy is crucial for DMOs and operators to remain visible and relevant in a changing digital landscape.



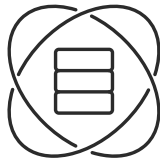
BECOME THE ANSWER

Position your brand as an authority so your content is the source for direct AI answers.



STAND OUT WITH AI

Clear, structured website information makes it more likely that your organization will be featured in these direct answers.



FUTURE-PROOF YOUR STRATEGY

Continuing to follow SEO best practices and investing in a strong website foundation sets you up for long-term success.



TRACK AND ANALYZE BRAND PERFORMANCE

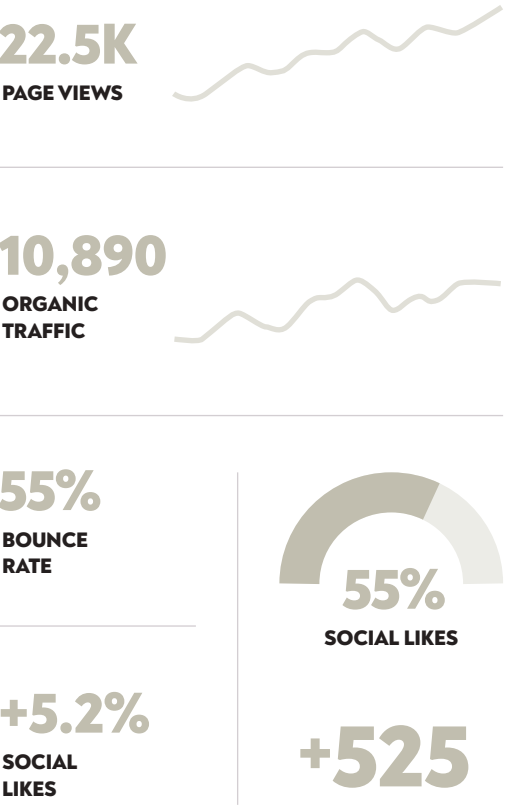
Continuing to follow SEO best practices and investing in a strong website foundation sets you up for long-term success.

Traditional key performance indicators (KPIs), such as views and organic traffic, no longer tell the full story. In this new environment, new KPIs could include:

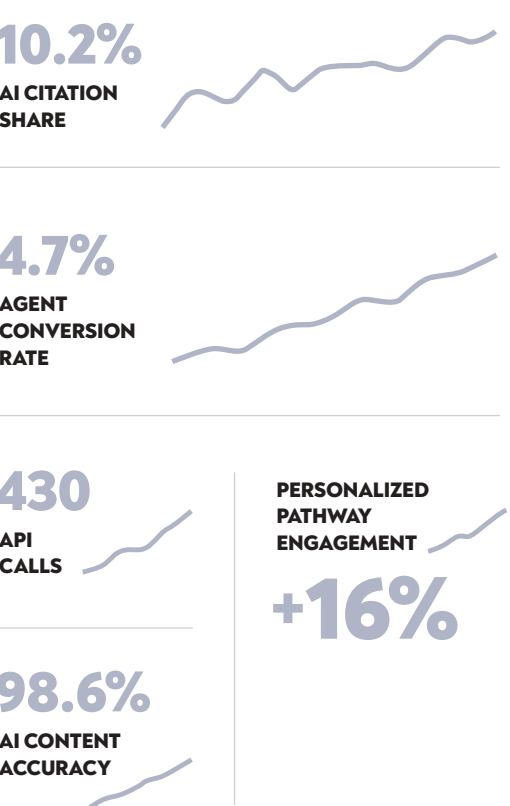
- » AI search visibility - Share of citations in generative AI results for target queries.
- » Agent-driven conversions - Number and value of bookings completed through AI agents.
- » API engagement - Call volume, uptime, and usage by third-party platforms.
- » Audience engagement - Interaction with personalized pathways and tailored content.
- » Content performance in AI - Frequency and accuracy of brand mentions in AI responses.

This represents an emerging and continually evolving paradigm in marketing. As technology and processes advance, we will remain leaders in the destination marketing space by staying nimble and adaptable, continually refining our KPIs and strategies to leverage new developments.

OLD METRICS



NEW METRICS



GEO IS THE NEW DIGITAL PR

A successful data-informed content strategy that will grow the organic search footprint for your brand both on traditional SERPs (Search Engine Results Page) as well as within Generative AI applications can be focused on the following core pillars:

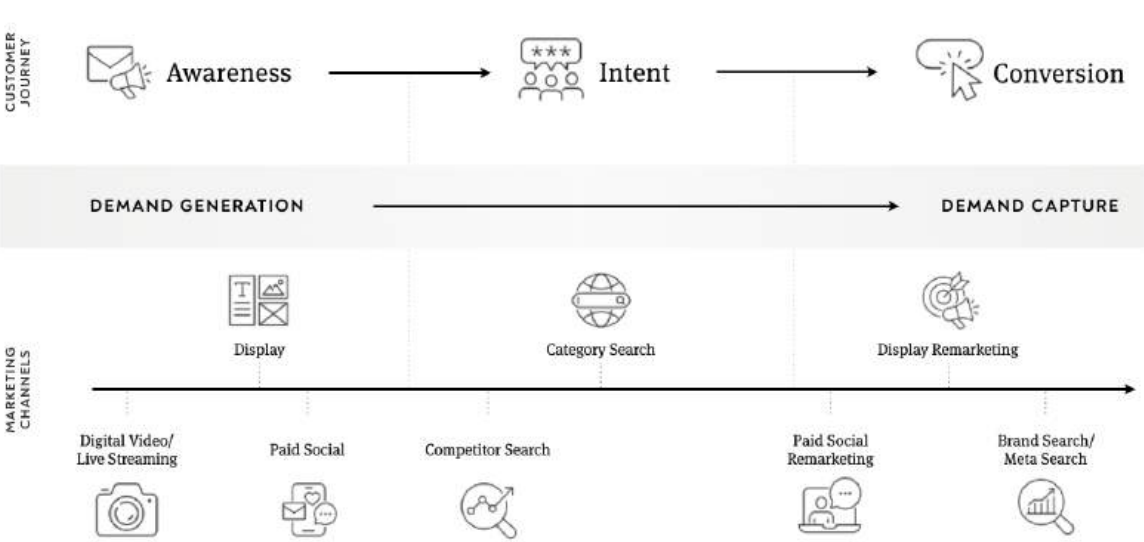
BE TECHNICALLY IMPECCABLE
Keep your site fast, error-free, and structured so AI can read and trust it. Use emerging tools (like llms.txt) to give Large Language Models extra context about your brand.

BUILD DIGITAL CREDIBILITY
Cultivate partnerships, manage your online reputation, and earn authoritative backlinks. Keep your brand details (NAP) consistent so LLMs see you as a trusted source.

CREATE AI-READY CONTENT
Publish high-value, relevant, and diverse content designed to be cited in AI answers—then test and refine for the new search landscape.

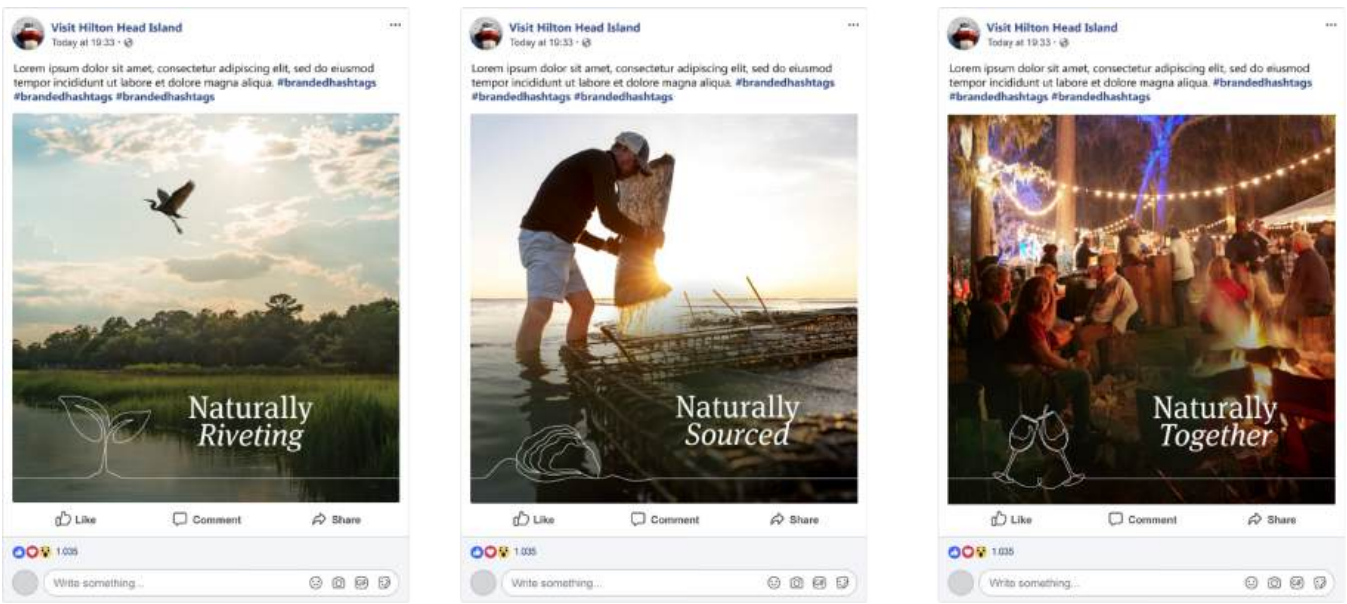
SOCIAL AND DIGITAL STRATEGY

Our social and digital strategy plays a critical role in shaping how travelers discover and engage with Hilton Head Island. Across platforms, we deliver visually compelling, on-trend content that reflects the Island’s experiences while positioning the destination within the moments and conversations that influence travel decisions.



Short-form video, curated itineraries, and partner storytelling work together to inspire new visitors and encourage return trips. Paid and organic efforts are closely aligned, allowing us to reach highly targeted audiences while maintaining an authentic and engaging brand presence.

Local creators and influencers are central to this approach, bringing a credible, on-the-ground perspective that strengthens storytelling and expands reach. By elevating these voices, we create a steady stream of relevant content that resonates with today’s traveler.



HILTONHEADISLAND.ORG

HiltonHeadIsland.org serves as the foundation of our marketing ecosystem, evolving to meet the expectations of today’s AI-driven traveler. Through ongoing enhancements, the site is designed not only to inspire, but to seamlessly guide users toward planning and booking.

Our focus on Generative Engine Optimization (GEO) ensures that content is structured to perform across both traditional and AI-powered search, increasing visibility in how travelers now discover destinations. This is complemented by the integration of Mindtrip’s AI-powered chatbot and itinerary tools, which transform the website into an interactive planning experience.

Together, these enhancements allow us to connect inspiration with action, ensuring visitors can easily explore, personalize, and plan their Hilton Head Island experience in real time.



FULFILLMENT

The Hilton Head Island Vacation Planner is a premium, “coffee table” style publication that showcases the destination through high-quality design, photography, and storytelling, offering a tangible, immersive way for potential visitors to engage with the Island.

Our focus is on ensuring this piece reaches the right audience. Through direct mail fulfillment

to individuals who actively request it, along with placement in all South Carolina welcome centers and other key touchpoints, the planner is delivered into the hands of travelers already in a planning mindset. This targeted distribution makes it a highly effective and worthwhile investment, extending the reach of the destination in a way that is both memorable and impactful.

MARKETING SUPPORT

Research is not simply a support function. It is a strategic pillar that guides how we position, target, and grow Hilton Head Island as a destination. Every major marketing decision is grounded in data, ensuring our efforts are aligned with both visitor demand and community priorities.

Through a combination of first-party research and third-party data partnerships, we develop a clear, evolving understanding of who our visitors are, how they behave, and what motivates them to choose Hilton Head Island. This foundation allows us to move beyond assumptions and make informed, confident decisions that strengthen both performance and long-term sustainability.

Our research framework reflects a deliberate shift from volume to value. Success is not defined by increasing visitation, but by attracting the right visitors, those who support the Island’s economy and increase the Island’s quality of life.

To guide this approach, we utilize cutting-edge tools such as Placer.ai and Zartico to better understand who our visitors are, where they come from, and what drives them to choose Hilton Head Island. These insights allow us to refine targeting and focus on high-value audiences rather than broad demand.

This makes measuring economic impact essential. Through an annual economic impact report and ongoing visitor and resident sentiment research, we ensure tourism delivers meaningful economic benefit while preserving the character of the Island.

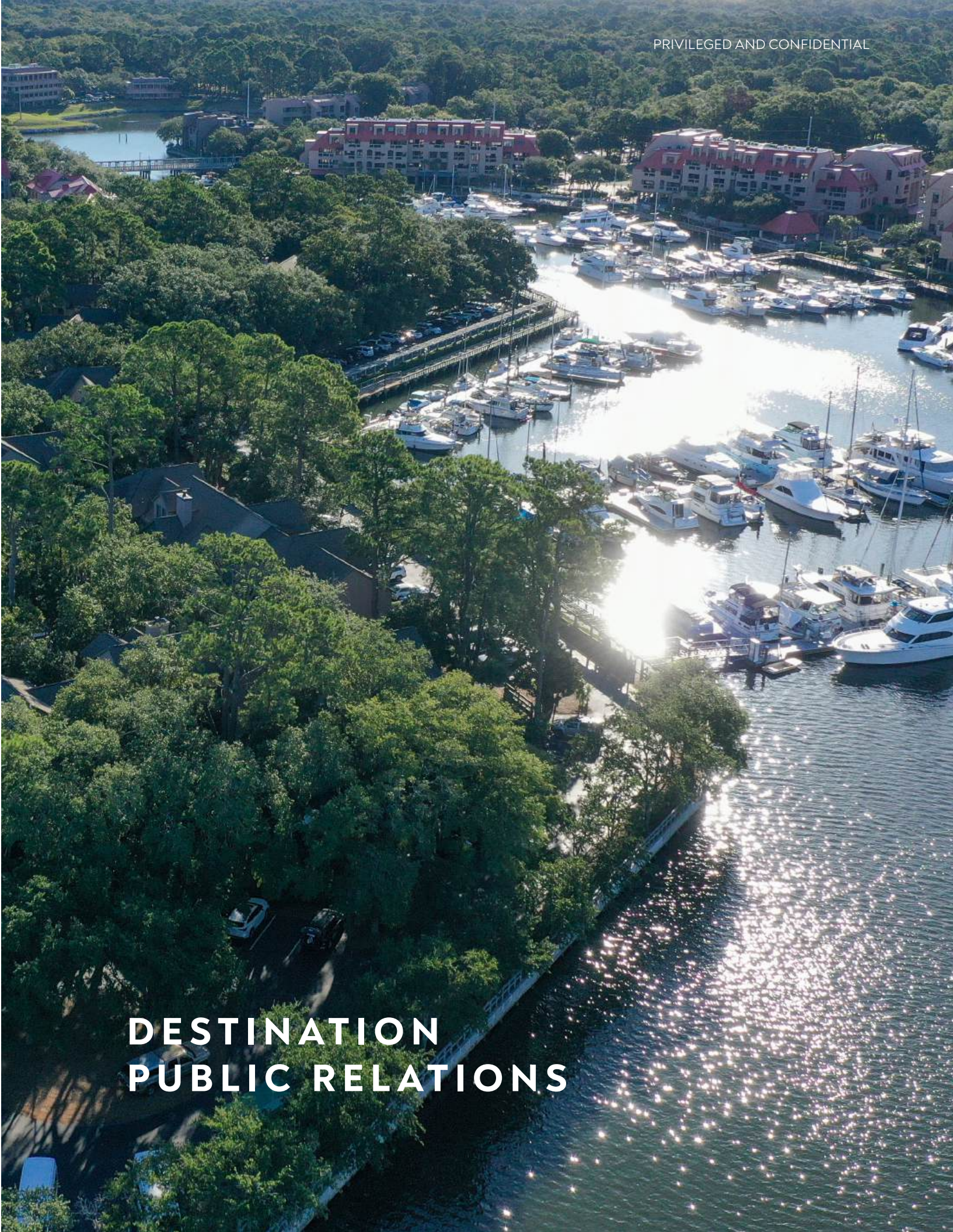
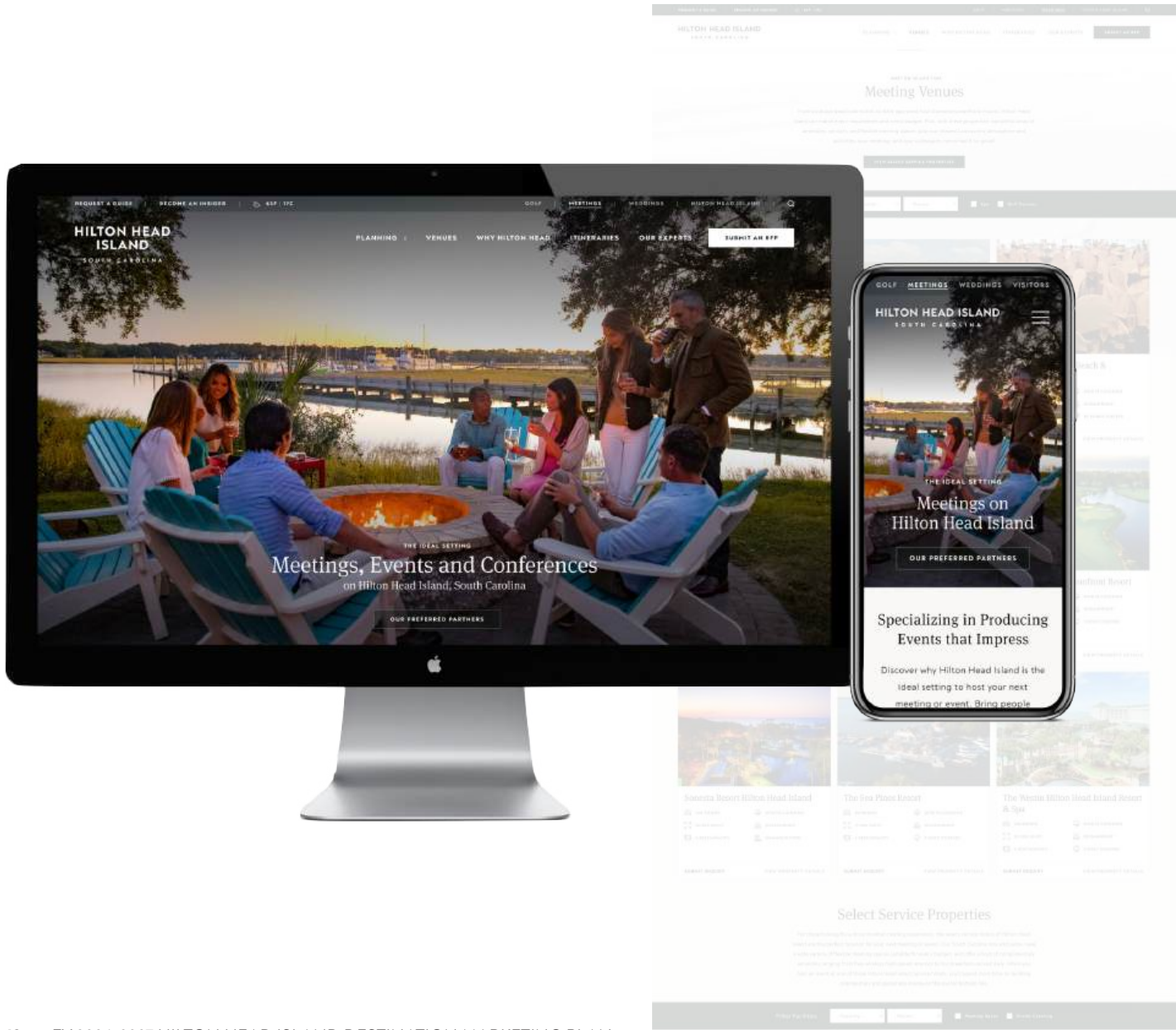
All economic impact reports, visitor profile studies, marketing plans (inclusive of budget), DMO metrics books, and independent audits are available at THINK: Transparency in Tourism Marketing.

GROUP SALES & MARKETING

Group sales play a strategic role in delivering high-value visitation that aligns with Hilton Head Island’s focus on quality over quantity. By targeting meetings, corporate retreats, and small-to-mid-size groups, we are able to drive meaningful economic impact while maintaining balance within the destination.

Our efforts focus on core drive and short-haul markets, including the Southeast and key feeder states such as South Carolina, North Carolina, Georgia, and Florida, as well as markets like Ohio, New York, Pennsylvania, and Illinois. Within these markets, we prioritize corporate retreats, leadership meetings, association groups, incentive travel, and wellness-focused gatherings that align with the Island’s upscale, experiential offering.

By focusing on groups that generate strong return, higher average daily rates, increased spending, and year-round demand, we support local businesses while helping to fill need periods without adding pressure to peak seasons.



DESTINATION
PUBLIC RELATIONS

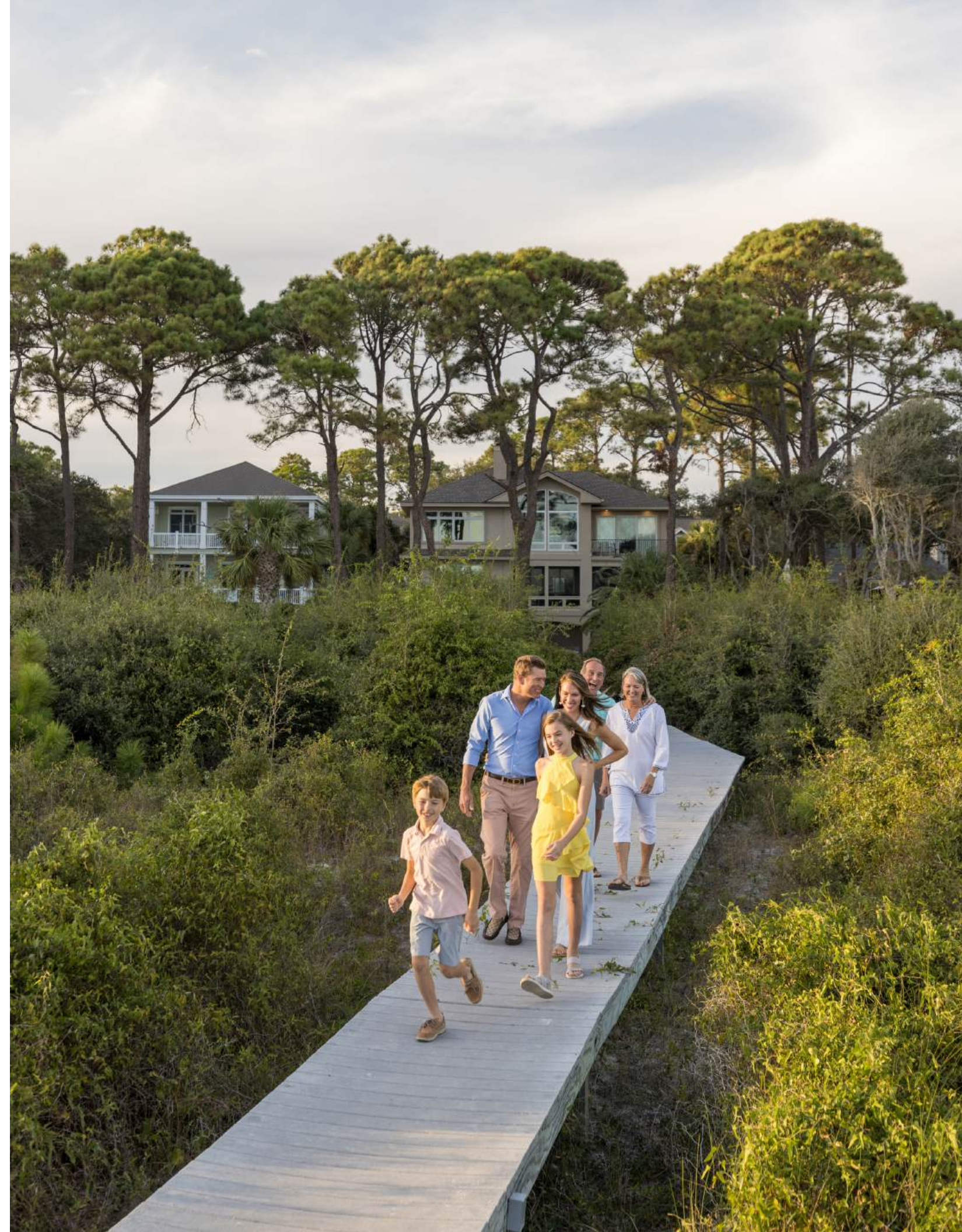
The Hilton Head Island & Bluffton Chamber of Commerce’s FY 2026–2027 public relations strategy is designed to differentiate the destination in an increasingly competitive travel landscape while converting first-time visitors into repeat guests.

Despite economic uncertainty, travel demand remains strong, with consumers prioritizing meaningful, experience-driven trips, particularly to destinations that offer sustainability, culture, and a sense of escape from crowded hotspots. Hilton Head Island is well-positioned to capitalize on these trends, and the plan will build on established PR tactics while leveraging strong media relationships and evolving platforms to maintain visibility as a premier domestic island destination.

The media landscape continues to shift rapidly, with traditional outlets declining and digital platforms, freelancers, and social media playing a larger role in shaping travel narratives. Influencers are now a major driver of travel decisions, particularly among younger audiences, making their integration into earned media strategies essential. At the same time, journalists are planning further in advance and increasingly require firsthand destination experiences, necessitating earlier outreach and more strategic press trip planning. These changes will require a more agile, forward-looking PR approach that blends traditional media relations with influencer and digital-first storytelling.

Consumer travel trends present key opportunities for Hilton Head Island to align its messaging with what travelers are seeking today. These include interest in “detour destinations” that offer proximity and authenticity, slower joy of missing out (JOMO)-style travel experiences, deeper cultural and heritage exploration, and sustainable tourism practices. The destination will also continue targeting core audiences such as families, regional drive markets, and high-value travelers, while expanding into new channels like podcasts, lifestyle programming, and influencer-driven platforms to reach broader and more diverse audiences.

To bring this strategy to life, the plan prioritizes storytelling across key themes including Gullah culture, ecotourism, events and festivals, wellness, recreation, and culinary experiences. Execution will be driven through a mix of tactics such as customized journalist and influencer visits, paid influencer partnerships, always-on media relations, and strategic brand collaborations. Together, these efforts aim to amplify Hilton Head Island’s unique identity, drive sustained media coverage, and inspire year-round visitation.



DESTINATION ACCOLADES

Women’s Health

2025 Health Travel Awards
Best Wellness Program Hilton
Head Health & Wellness
Resort & Spa

Golf Digest

America’s 100 Greatest
Golf Courses

USA Today 10Best

Best Beach in South Carolina
- Coligny Beach

USA Today 10Best

Best Resort Airport
(Hilton Head Island Airport)

US News & World Report

12 Best Places to Visit
in South Carolina

Yahoo Lifestyle

These Are the Best Spa
Resorts in the U.S. for a
Relaxing Weekend

MSN Travel

20 Best Islands to Visit
Without Leaving the U.S.

Travel + Leisure

12 Best Beach Towns
on the East Coast

Travel Noire

Domestic Wellness Destinations
To Relax, Relate, And Release

USA Today 10Best

Best Beach Bar -
The Beach House

USA Today 10Best

Best Wellness
Retreat Center

US News & World Report

2 SC Hotels are the
Best in the US for 2025

DESTINATION ACCOLADES

Condé Nast Traveler

Hilton Head Island among
the Best Beaches in the
United States

Travel + Leisure

“Hilton Head Island one of
the Best Beach Towns to Live
in Year-Round”

Travel & Leisure

16 Best Spa Weekend
Getaways in the U.S.

Travel & Leisure

Travel + Leisure Readers’
15 Favorite Islands in the
Continental U.S. of 2025

Southern Living

“Hilton Head Beach has the
Bluest Water in S.C.”

Southern Living

The 8 Most Beautiful Places On
The South Carolina Coast

Condé Nast Traveler

11 Coastal Hotels in the US
for a Sunny Spring Break

Travel & Leisure

11 Best Places to Live
in South Carolina

Travel & Leisure

10 Best Vacation Destinations
for Seniors

Southern Living

The 50 Best Beach Towns
In The South 2025

Tripadvisor

Top 10 of Tripadvisor’s
Top Trending Destinations
in the US

APPENDIX

GLOSSARY OF TERMS

HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

Board of Directors & DMO Marketing Council

DEMOGRAPHICS

COMMUNITY CORNERSTONE PLAN

2025 Performance, Goals 1-5

MMGY INTELLIGENCE

Community Sentiment Survey Executive Summary, Wave 3

OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

2025 Visitor Profile Study

OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

2025 Estimated Total Impact of Tourism in
Hilton Head Island on Beaufort County

VERB INTERACTIVE

2025 Digital and Social Media Marketing Recap

WEBER SHANDWICK

2025 Public Relations Recap

HIGHLIGHTS FROM THE CHAMBER MEMBERSHIP SURVEY

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

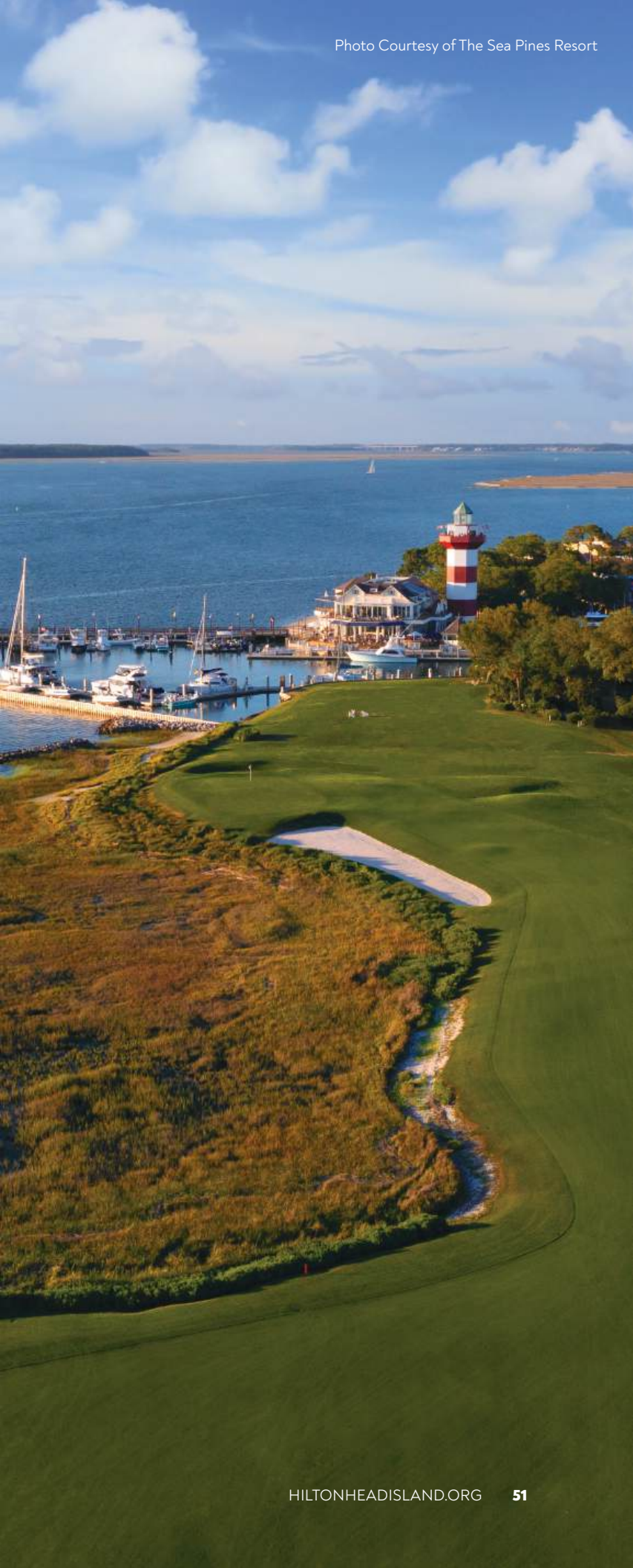
Demand Generation - The strategic efforts aimed at creating interest and awareness among potential customers for a product or service. It involves utilizing various digital channels and tactics to attract, engage, and ultimately convert prospects into leads or customers.

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.



2025 BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

CHAIR

Susana Cook
Hilton Garden Inn

VICE CHAIR, BLUFFTON
REGIONAL BUSINESS
COUNCIL

Diana McDougall
Coastal States Bank

VICE CHAIR, BUSINESS
EDUCATION PARTNERSHIP

Ray Warco
Center for Strategic Planning/USC
Beaufort

VICE CHAIR, BUSINESS
WORKFORCE COALITION

Mike Overton
Outside Brands

VICE CHAIR, FINANCE

Joel Taylor
Hilton Head Regional Healthcare

VICE CHAIR, MEMBERSHIP

Lola Campbell
Binya Boutique, LLC

VICE CHAIR,
PUBLIC POLICY

Mary Lee Carns
Technical College of the
Lowcountry

VICE CHAIR, VISITOR &
CONVENTION BUREAU

Bob Cosgrove
Sonesta Resort Hilton Head
Island

PRESIDENT & CEO

William G. Miles, IOM, CCE
Hilton Head Island & Bluffton
Chamber of Commerce

FY 2025-2026 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

Bob Cosgrove
General Manager
Sonesta Resort Hilton Head Island

Convention Property Seat
Mark Goodwin

Director of Sales & Marketing The
Sea Pines Resort

Cultural/ Historical Seat

Natalie Harvey
Director of Culture
Hilton Head Island

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

Rex Garniewicz
President & CEO
Coastal Discovery Museum

Golf Seat

Brad Marra
Chief Operating Officer
Palmetto Dunes Oceanfront Resort

Transportation & Tours Seat

Lori Lynah
Director of Airline Recruitment
and Marketing
Savannah/Hilton Head
International Airport

Transportation & Tours Seat

Jon Rembold
Airport Director
Hilton Head Airport

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
Partner
Coastal Restaurants & Bars (CRAB)

Retail Seat

Beth Patton
Marketing Manager
Forsythe Jewelers

Town Council

Councilwoman Melinda
Tunner
Ward 6

Marketing & Brand Manager

Kelly Spinella
Town of Hilton Head Island

BOARD OF DIRECTORS

Calvin Belknap

Omni Hilton Head
Oceanfront Resort

Steve Birdwell

The Sea Pines Resort

Andrea Bragg

Forsythe Jewelers

Karen Cline

Sparklight

Berl Davis

Palmetto Electric
Cooperative

Darrell Naylor-Johnson

Savannah College of
Art & Design

Greg Kelly

Savannah/Hilton Head
International Airport

Jon McGaunn

Montage Palmetto Bluff

Walter Nester

Burr & Forman

Dr. Al Panu

University of SC,
Beaufort

Jon Rembold

Hilton Head Island Airport

Mike Tighe

Westin Hilton Head Island Resort &
Spa

Ahmad Ward

Historic Mitchelville Freedom Park

Steve Wilmot

Heritage Classic Foundation

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.	Continue to build out and promote The Promise campaign, a VCB initiative that promotes the importance of our environment and efforts to protect and preserve our delicate ecosystem.
	Bring awareness to environmental programs; e.g. Loggerhead Sea Turtles, Dolphins, Piping Plovers through The Promise campaign, through touchpoints such as a Sustainability Tool Kit and e-Commerce platform.
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.	Partner with Coastal Discovery Museum, Outside Foundation, Sea Turtle Patrol, & Office of Cultural Affairs creating in-depth programming to further emphasize the importance of our environment.
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.	Implement annual resident sentiment survey.
	Present findings to key stakeholders; Town, residents, businesses partners, etc. Benchmark and update resident sentiment results annually.
Develop community-wide programs to increase awareness and support of tourism & hospitality as a key economic driver providing growth opportunities for all.	Host bi-annual community engagement events.
	Regular cadence of Chamber driven communications to local businesses, e.g. Monthly Power Hour, Monday Briefing, Chamber social, Chamber website, email campaign, regional and local media outlets. Designated resident & community communications, outreach and informational meetings. Deployment of annual resident sentiment surveys.
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.	Connect with USCB and develop a Brand Boot Camp program. These could be extensions of the existing Island Ambassador Program or a hybrid program.
	In partnership with USCB, create a Brand Tool Kit to complement the program. Once a business engages with the program, the BrandTool Kit would be a leave behind local businesses could use to showcase through their channels. Tourism economy health check -town integration/ cadence 1x per year.
	Data management platform examples: Zartico, Simpleview, Keydata.
	Hiring dedicated headcount to support these new platforms and analytics. Liaise with community counterparts to share insights and promote a data-driven ecosystem for the destination.

TIMING

LEAD	FY 2024	FY 2025	FY 2026	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.
Assess availability of existing structures and government-owned land to potentially develop workforce housing on/off island.	Showcase the diversity of career opportunities that exist throughout the destination.
	Chamber to establish a working relationship with the Affordable Housing Committee to understand current efforts in place, plan for future efforts, and overall need that Hilton Head Island can support.
Work in partnership and enhance industry workforce development initiatives with the public sector, area schools, and industry partners.	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.
Develop strategic understanding of requirements for hiring senior and strategic talent to support local businesses in their talent search.	Introduce new, formalized internship programs within the Lowcountry that include diverse offerings and hiring opportunities postintern ship.
	Work to enhance presence with TCL/ Culinary Institute/ USCB/ high school guidance counselors/ career fairs in an effort to build support for tourism and hospitality as a long-term viable career.
Enhance and promote awareness of hospitality and cultural training programs in collaboration with local educational institutions and industry partners.	Chamber's continued support of SC Apprentice Program, Chamber Junior and Senior Leadership programs that support the retention efforts regarding workforce and the tourism industry for this region.
	Survey large, local hospitality businesses (The Sea Pines Resort etc.) and compile resourcing roadmap for required senior-level and strategic talent.
	Conduct salary analysis and competitive hiring practices in comparable communities.
	Understand and support collaborative efforts to ensure a competitive landscape on salaries, benefits and lifestyle opportunities.
	Establish a joint social media campaign between the Town and Chamber that speaks to the Live, Work, Play opportunities on Hilton Head Island.
	Create and promote a tourism & hospitality industry recruitment video.

TIMING

LEAD	FY 2024	FY 2025	FY 2026	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	TACTICS
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.	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 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.	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.
Enhance and support the historic and cultural locations on the island-programming and promotion.	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.
Diversify the visitor by sharing different perspectives and representation across marketing touchpoints.	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.
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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.
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 and implement strategy for delivering 5G/ Ultra wideband throughout the destination.
Increase rideshare and airport transportation options.	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

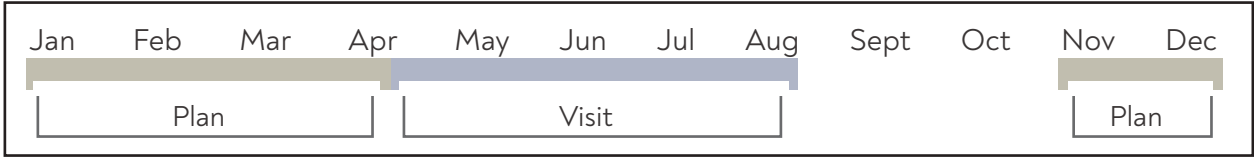
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Private Sector/ Chamber		•		Engage three rideshare partners.
Town/ Private Sector/ Chamber	•			RFP responses and successful bidding process.
Town/ Private Sector/ Chamber			•	Identification of ways to work alongside rideshare regulations and serve residents and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



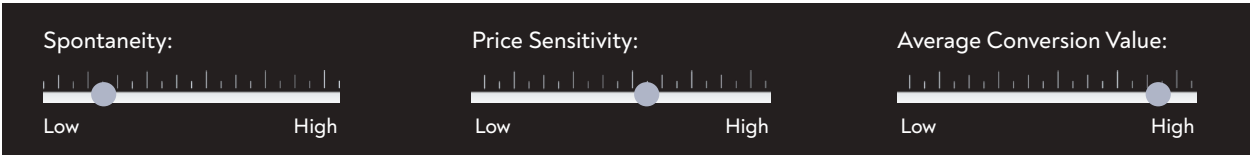
FAMILY

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

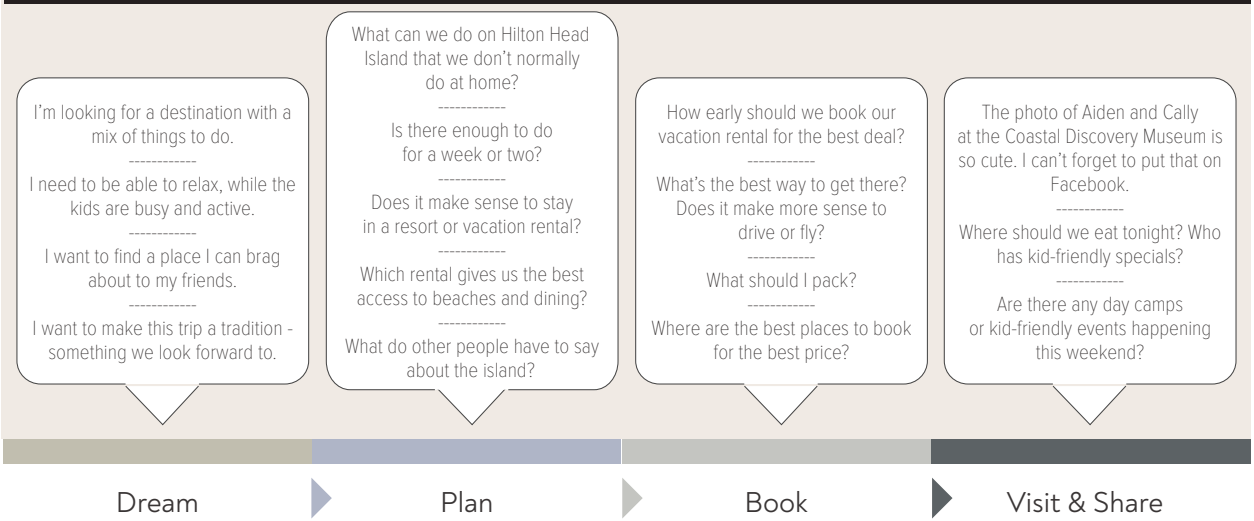
PREFERRED ACTIVITIES & ATTRACTIONS

- 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

“LET’S MAKE MEMORIES.” THEIR PATH TO PURCHASE

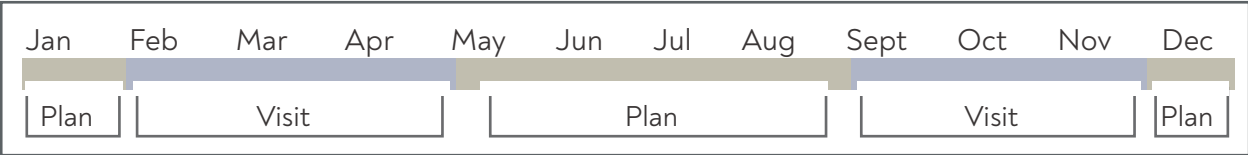




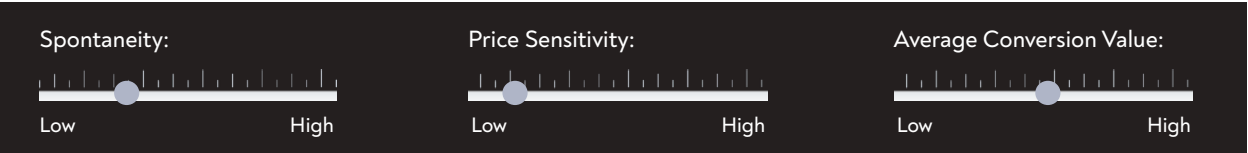
ARTS, HISTORY & CULTURE

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

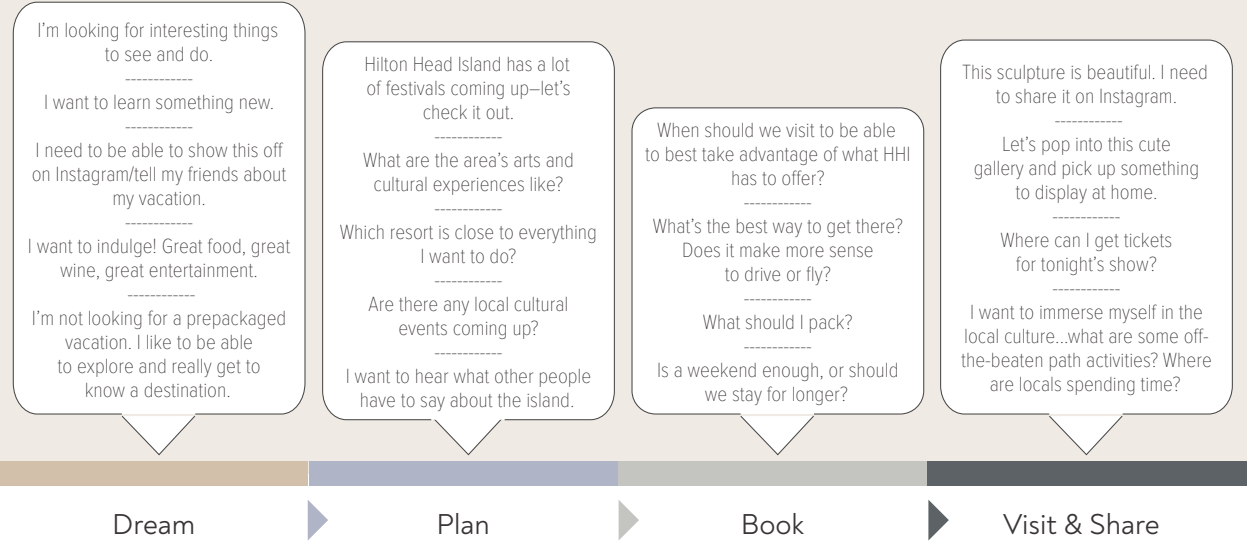
PREFERRED ACTIVITIES & ATTRACTIONS

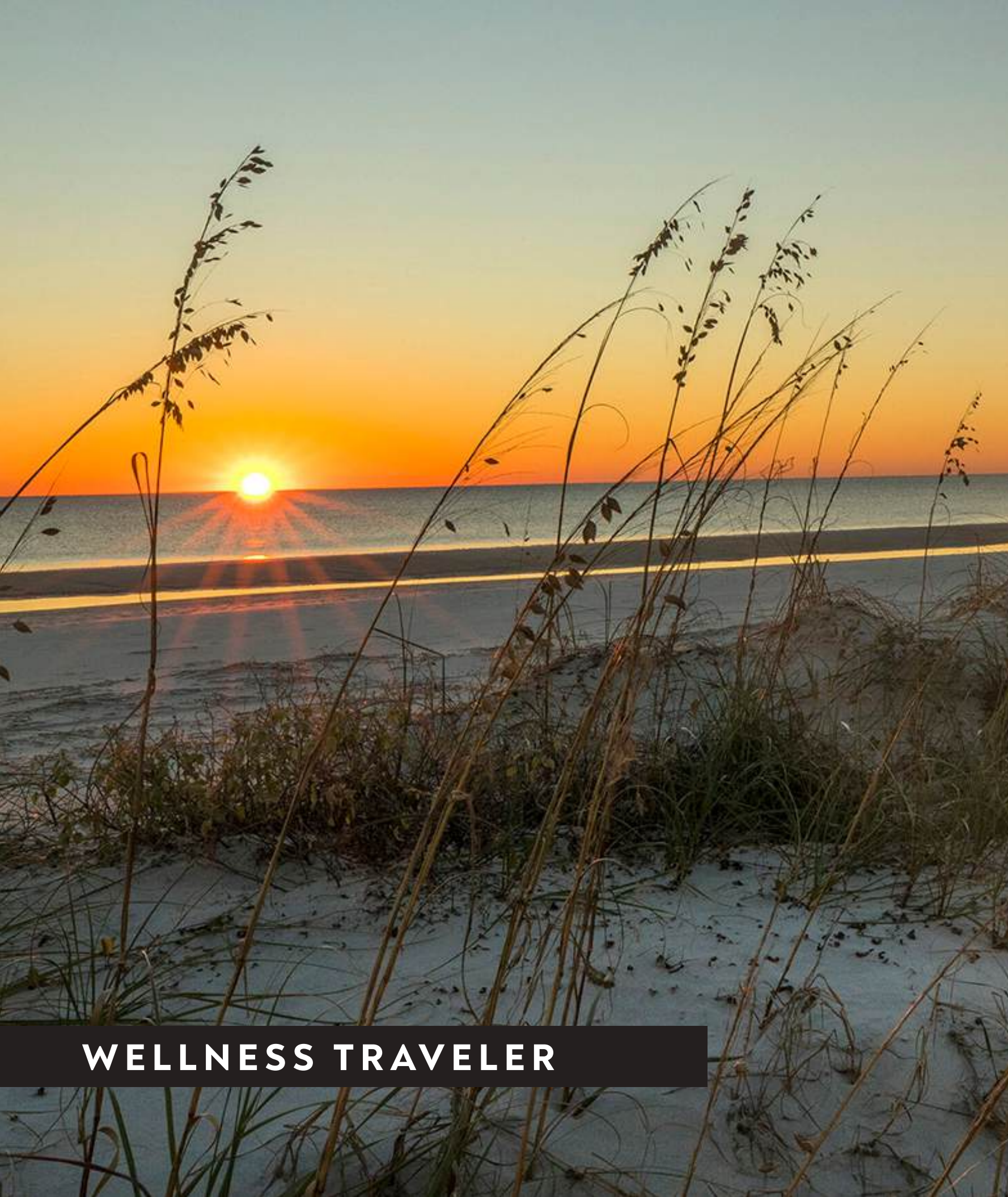
- Historical Attractions
- Art Galleries
- Local Culture
- Culinary Experiences
- Festivals & Events
- Theater
- Music

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

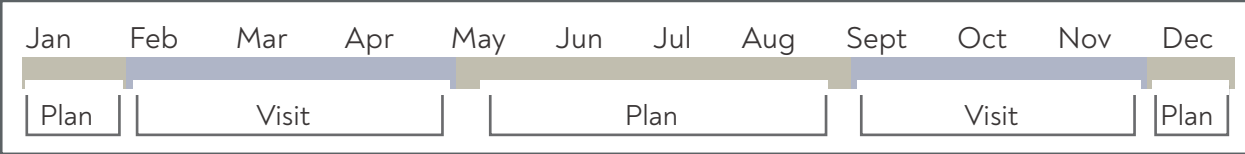




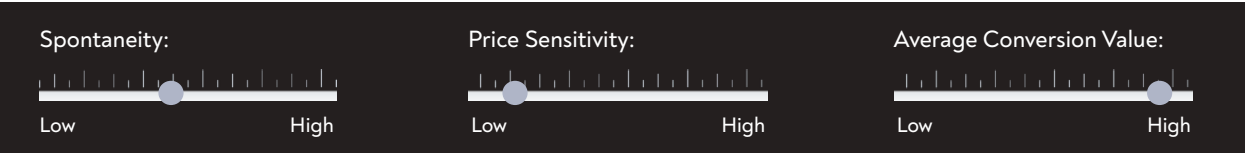
WELLNESS TRAVELER

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

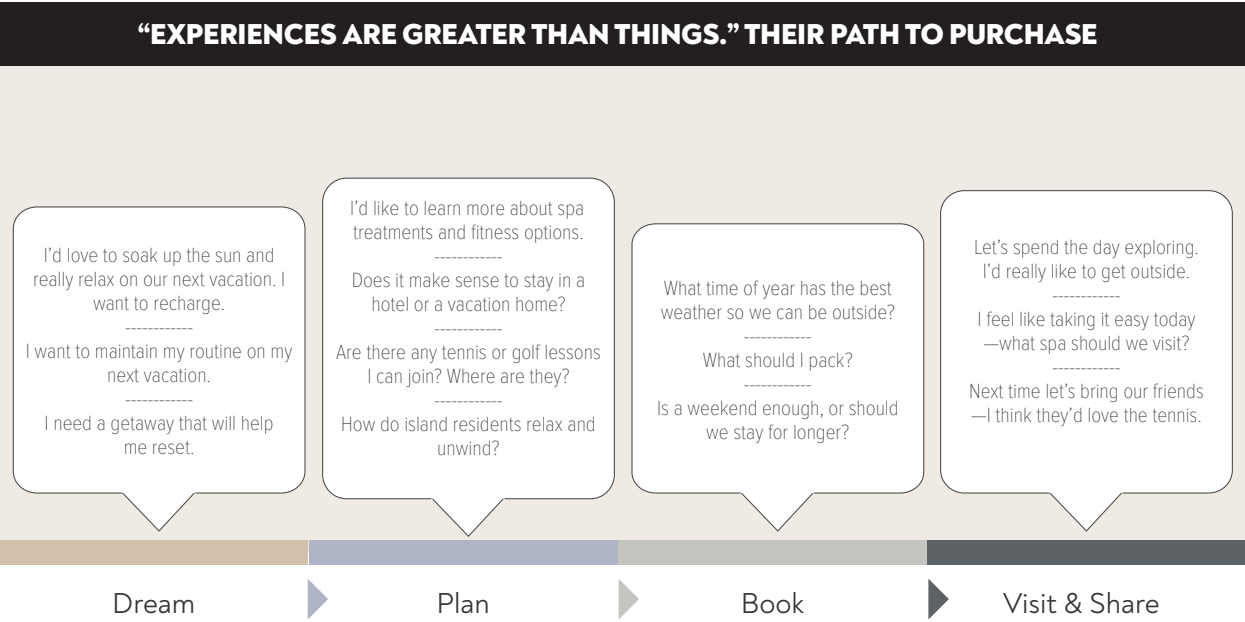
- ★ Upscale & Status Oriented
- 🍏 Active & Health Conscious
- 🍷 Enjoys the Finer Things
- ☂️ Leisure Lovers

PREFERRED ACTIVITIES & ATTRACTIONS

- Vacation Rentals & Resorts
- Golf
- Tennis & Pickleball
- Biking
- Spas

MARKETING CHANNELS & FORMATS

- Facebook
- Instagram
- Forums & Blogs
- TripAdvisor
- Pinterest

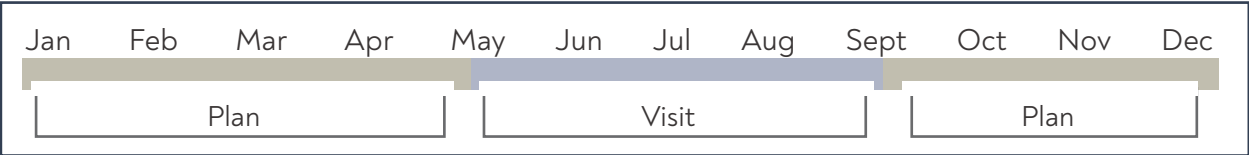




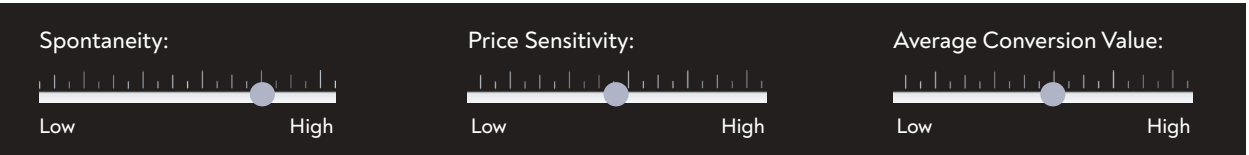
SPORTS ENTHUSIAST

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

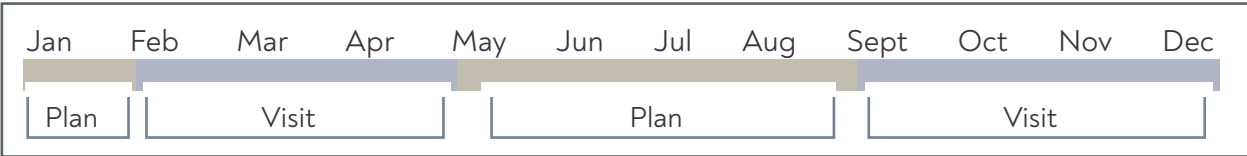




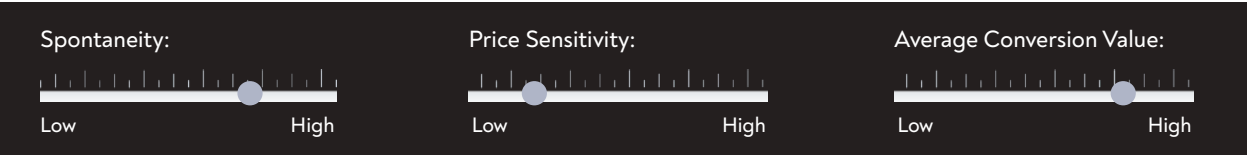
CULINARY

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
- Spontaneous & Social
- Seeking an Immersive Experience
- Unconventional

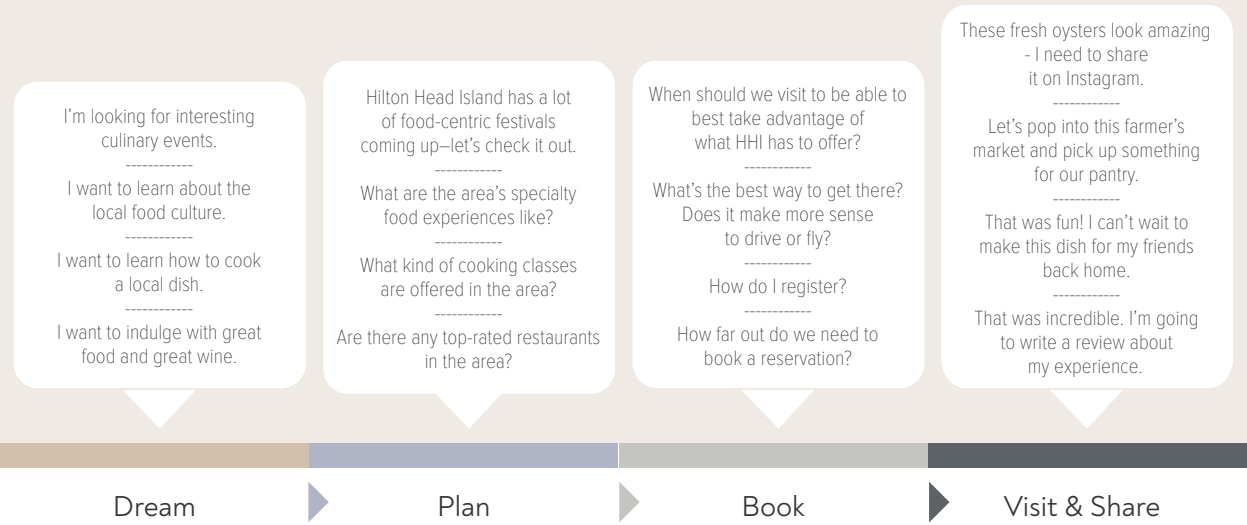
PREFERRED ACTIVITIES & ATTRACTIONS

- 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

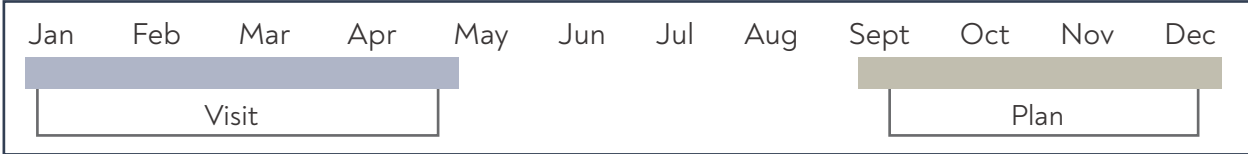




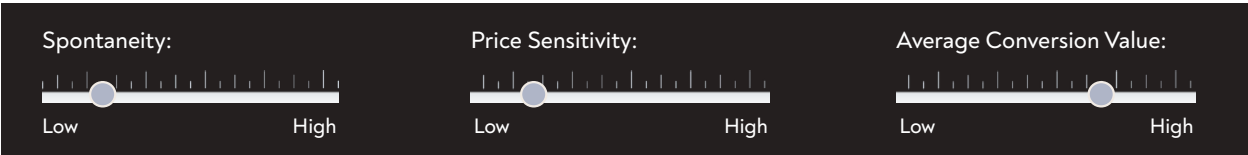
SNOWBIRDS

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

“LET’S MAKE THIS FEEL LIKE HOME.” THEIR PATH TO PURCHASE

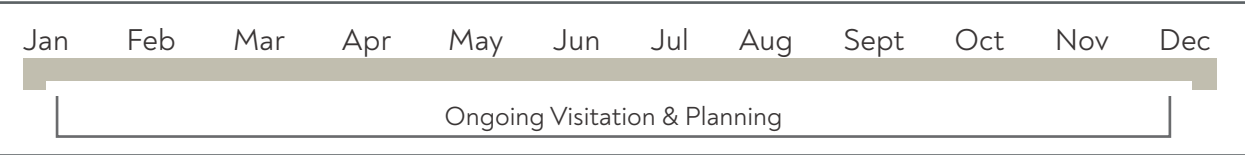




THE WEEKENDERS

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

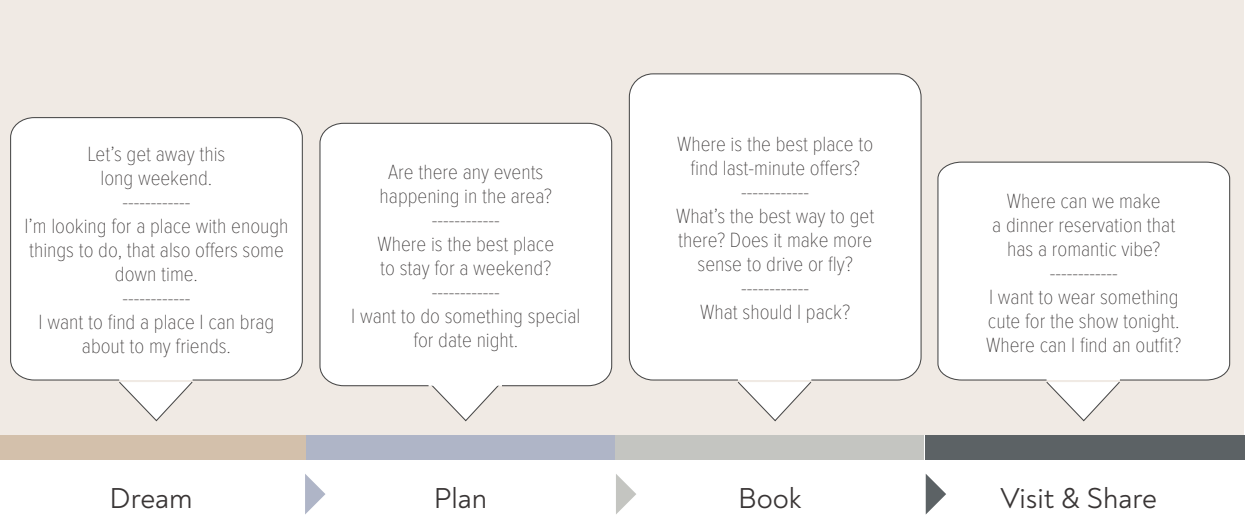
PREFERRED ACTIVITIES & ATTRACTIONS

- 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

“LET’S GET AWAY.” THEIR PATH TO PURCHASE

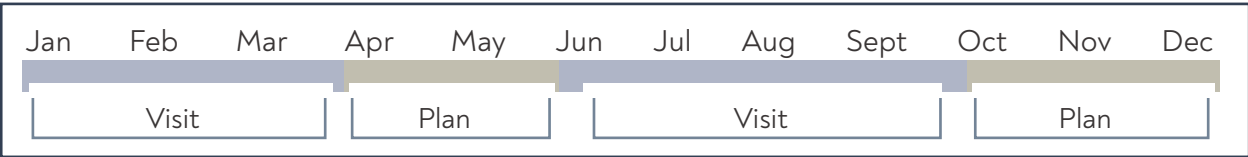




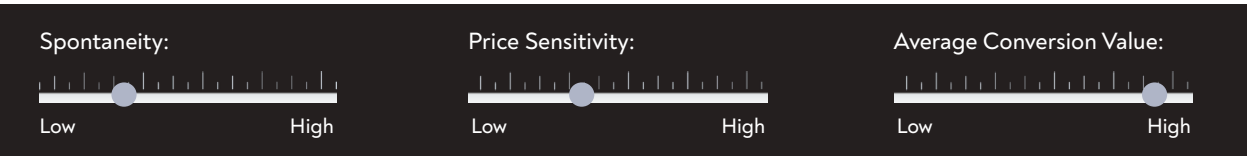
INTERNATIONAL VISITORS

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

- ★ Upscale & Status Oriented
- 🏠 Values Family Time
- 🏥 Wellness-Focused
- 📷 Making Memories
- 🍏 Active & Health Conscious

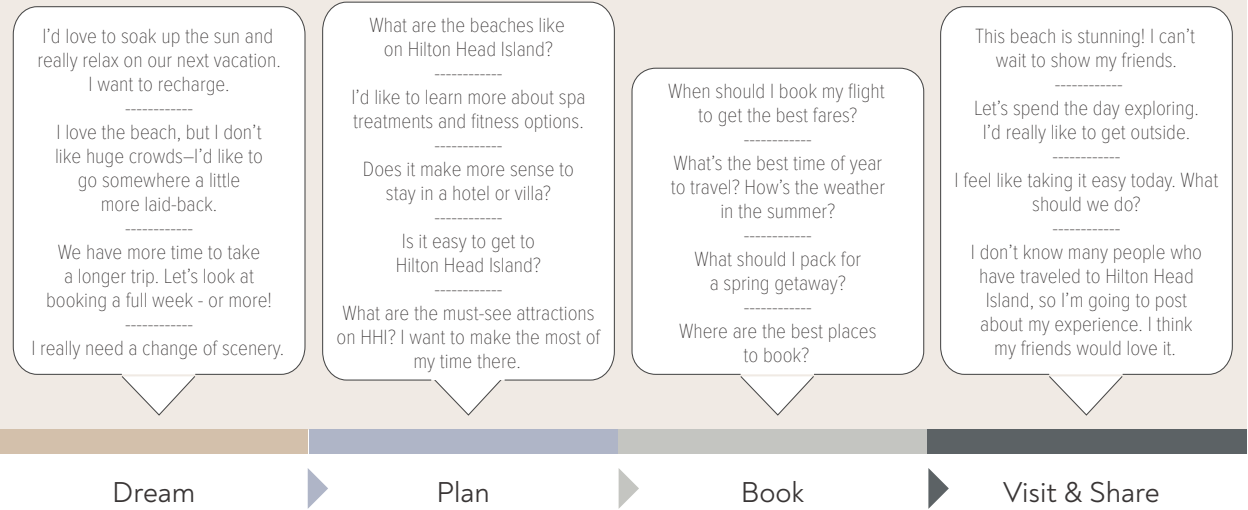
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

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

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



RESIDENT SENTIMENT
SURVEY OUTREACH PLAN

Resident Sentiment Survey on Tourism Resident Outreach Plan

2025 Survey Highlights

3,025+ Responses; exceeded 3,000 required	±1.4% Margin of error at 95% confidence	Year 6 2026 will be the 6 th annual deployment
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The Hilton Head Island Resident Sentiment Survey on Tourism is fielded annually by MMGY Travel Research, a nationally recognized leader in destination and tourism market research. MMGY brings best-practice survey methodology, consistent instrument design for year-over-year trending, and the ability to informally benchmark findings against comparable destinations.

The survey deploys in late August and early September, deliberately timed so residents can respond while the full impact of the island's peak summer season is fresh. Results are analyzed for demographic representation and reported with key findings analysis and benchmarking prepared by MMGY prior to broader distribution.

PART 1 — SURVEY DEPLOYMENT: AUDIENCES, CHANNELS AND CADENCE

Audience	Channels	Cadence
Island residents and property owners	Dedicated resident & business email campaign Chamber social media & other comms outlets <i>Residency verified; non-residents cannot participate</i>	Launch: late August – early September.
Gated community residents	Resident email channels <i>Distributed through each community's resident communications with results tracked by neighborhood</i>	Coordinated launch concurrent with Chamber deployment.
Non-gated and broader community residents	Targeted social media & chamber resident lists <i>Monitored throughout deployment to ensure balanced representation between gated and non-gated communities</i>	Concurrent with full deployment window; supplemental outreach triggered if representation balance warrants.
Town of Hilton Head Island	Town communications channels <i>Town has collaboratively amplified the survey through its own channels in past deployments</i>	Concurrent with deployment window as an amplification partner.

PART 2 — RESULTS DISSEMINATION: AUDIENCES, FORMAT AND TIMING

Audience	Format	Timing
Chamber board, staff and marketing and PR partners	MMGY key findings report Internal briefing	Following MMGY analysis; prior to public release.
Town Council & Town staff leadership	In-person presentations of Full findings report	Following board and done in person to allow for questions, input and discussion.
General public	Live presentations to POA groups, civic groups and in Annual metrics report, Tourism transparency site	Following Town Council presentation; publicly available at thinkhiltonheadisland.org.

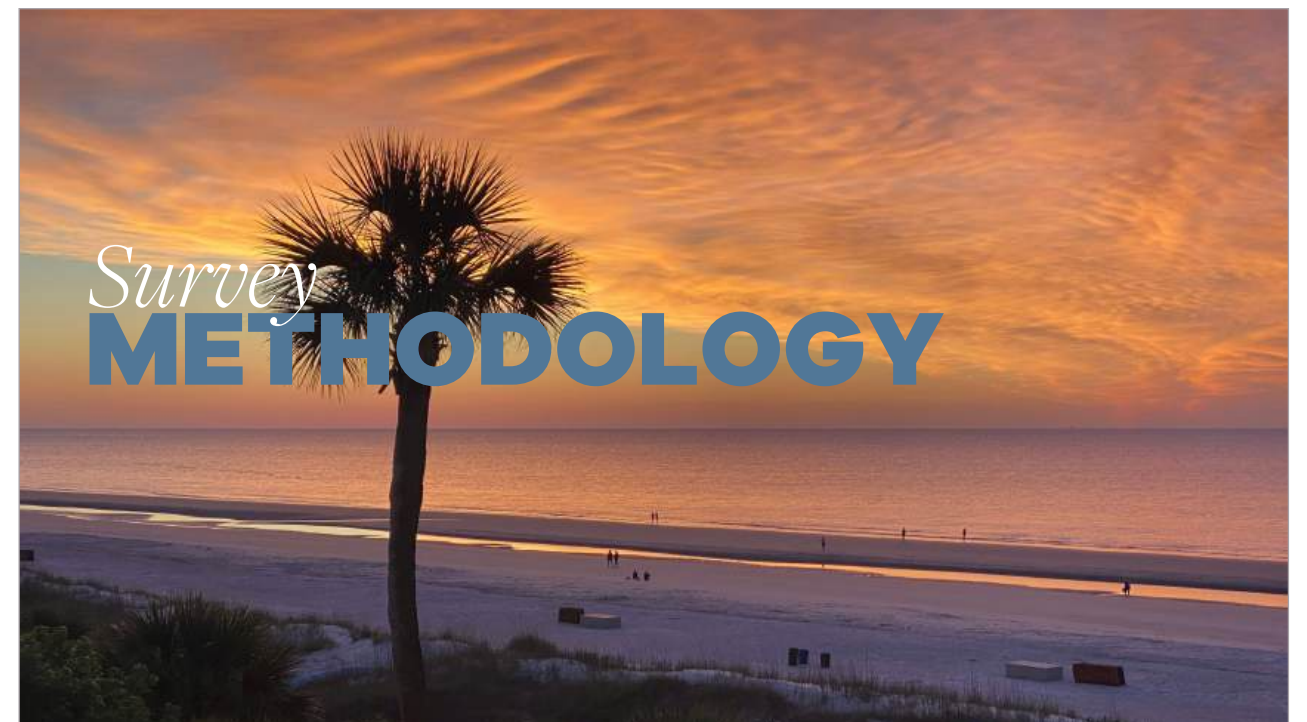
Audience	Format	Timing
Resident community and civic organizations	In-person presentations Chamber programs	Scheduled throughout the year

PART 3 — METHODOLOGY, CREDIBILITY AND THE VALUE OF YEAR-OVER-YEAR CONTINUITY

Why MMGY Travel Research - National leaders in DMO and destination research - Best-practice survey design and fielding protocols - Consistent survey instrument enables year-over-year trending - Results analyzed for demographic representativeness - Informal benchmarking context against comparable destinations	The value of six consecutive deployment years - Trend lines, not just annual snapshots, now available - Prior-year findings help inform the destination management priorities - Statistically robust: 3,025+ responses at 95% confidence, margin of error ±1.4% - Late summer timing captures peak-season sentiment while it is current - Collaborative outreach model has proven repeatable and reliable - Survey platform verifies residency; non-residents cannot participate
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MMGY INTELLIGENCE

Community Sentiment Survey Executive Summary, Wave 4

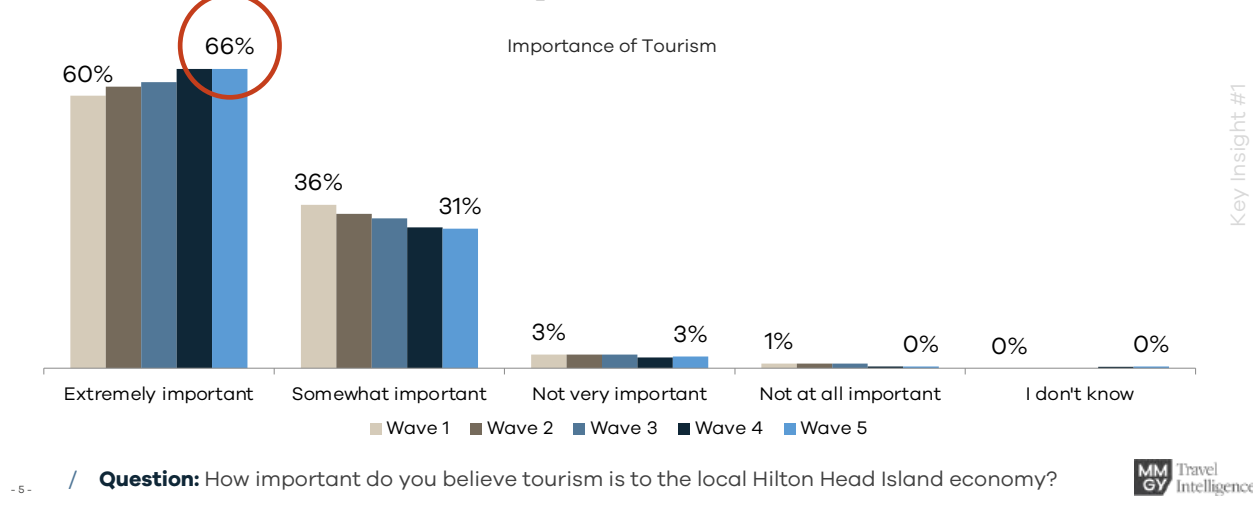


Survey Methodology

- An online survey of 3,025 Hilton Head Island residents.
- Residents were invited to complete the online survey through the Chamber website, social media channels, and email outreach.
- In the field August 21st through September 25th, 2025.
- The participants met the following criteria:
 - / Must be a resident or property owner of Hilton Head Island;
 - / 18 years of age or older.
- Throughout this report, data in **bold** indicates a significant difference.
- This sample size yields an error range of +/- 1.48 percentage points at the 95% level of confidence.



Similar to previous waves, two-thirds of residents believe tourism is extremely important to the local economy.



Key INSIGHT #1

Perceptions of the overall importance of tourism remained similar to Wave 4, but perceptions of overall positive impact of tourism on lives of residents rose significantly.

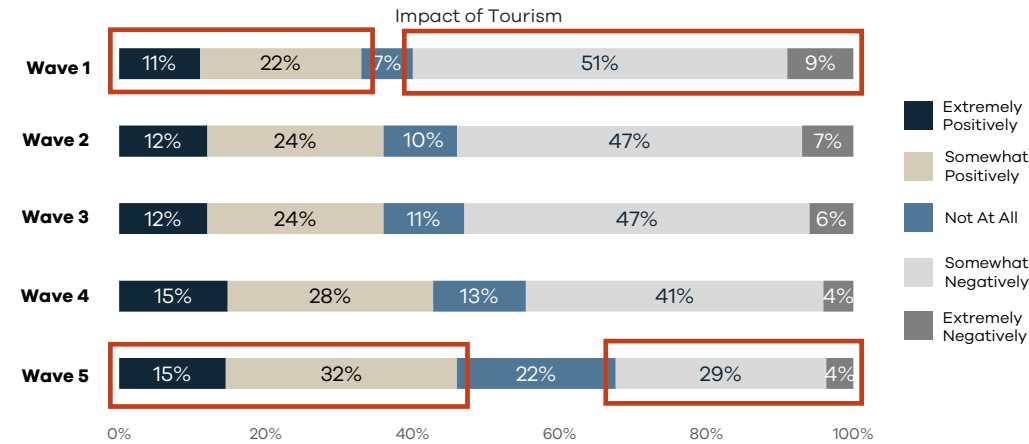
Recent arrivals are significantly more likely to describe tourism as very important to the economy.

By Length of Residency	Less than 5 years	5-10 years	11-20 years	More than 20 years
Extremely important	74%	65%	61%	63%
Somewhat important	24%	32%	34%	33%
Not very important	1%	3%	3%	4%
Not at all important	0%	0%	1%	1%
I don't know	0%	0%	1%	0%

Key Insight #1

MMGY Travel Intelligence

Perceptions of the impact of tourism on residents continue to increase.



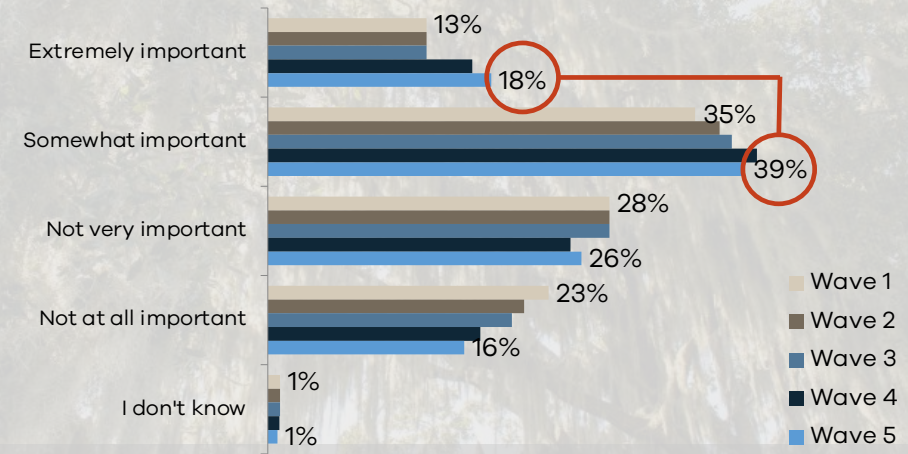
Question: How would you say Hilton Head Island tourism impacts your life as a resident?



Key Insight #1

Nearly 6 in 10 residents believe it is important to attract visitors during times of year with lower visitation.

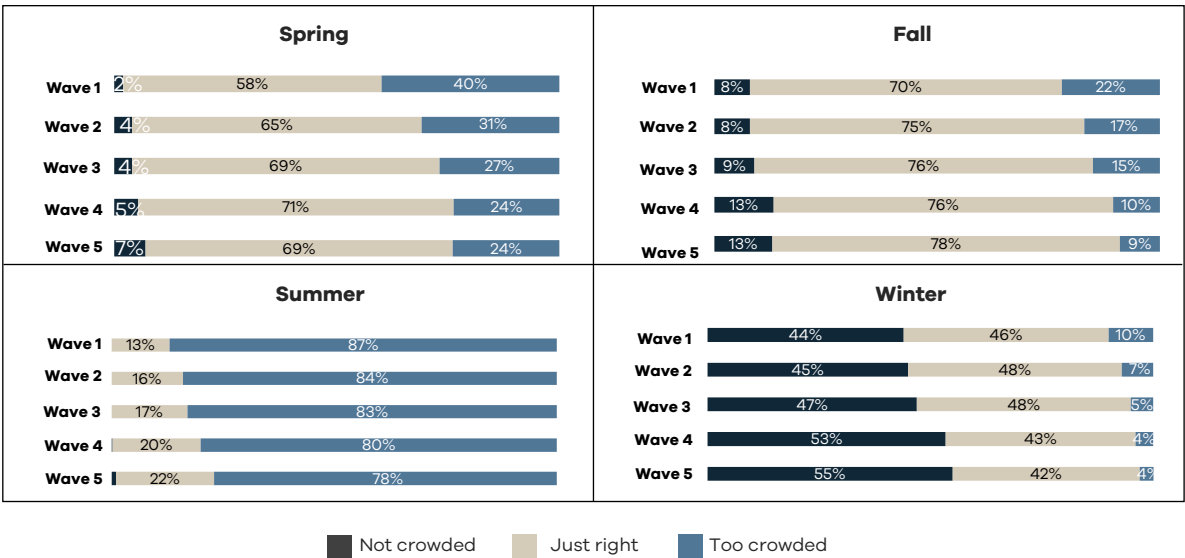
Importance of Attracting Visitors During Times of Year With Lower Visitation



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)?

Key Insight #1

Seasonal Perceptions



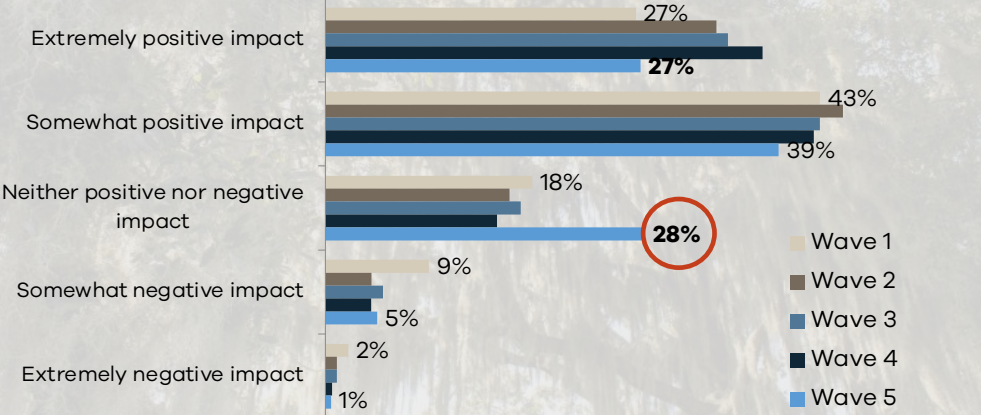
Question: Please indicate your perception of the level of visitation during the following seasons.



Key Insight #1

The perception of the positive impacts of marquee events and festivals declined in this most recent wave.

Type of Impact Hosting Marquee Events and Festivals Has on Residents and Visitors



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.

Key Insight #1

Key
INSIGHT #2

Residents agree that tourism is a boon to the local economy, generating tax revenue and creating jobs for local residents. However, traffic remains a lingering concern for residents, followed by overcrowding and the negative impact on natural resources.

Recognition that tourism covers the cost of beach renourishment and reduces taxes for residents rises.

Positive Statements (% Agree) – Bottom 6	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	
Helps to offset the costs for public safety personnel, streets/roads, schools	51%	58%	61%	63%	66%	
Supports existing small businesses throughout year	56%	59%	60%	64%	64%	
Covers the cost of beach renourishment	50%	53%	54%	57%	62%	▲
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55%	56%	55%	62%	▲
Is an important factor in making our community a great place to live	39%	45%	46%	50%	51%	
Helps create a positive ambiance/vibe in the local community	33%	37%	38%	43%	42%	

/

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

MM
GY

Travel
Intelligence

Key Insight #2

Residents continue to agree that tourism generates tax revenue and creates jobs for area residents.

Positive Statements (% Agree) – Top 6	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	
Generates tax revenues for state, county and local governments	76%	80%	81%	83%	84%	
Creates jobs for area residents	71%	73%	74%	78%	78%	
Provides restaurants that local residents can also enjoy	63%	68%	71%	74%	74%	
Increases real estate values	64%	66%	67%	72%	68%	▼
Supports local business creation	64%	68%	69%	70%	72%	
Provides amenities and attractions that local residents can also enjoy	56%	62%	64%	68%	69%	

/

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

MM
GY

Travel
Intelligence

Key Insight #2

Nearly 8 in 10 residents acknowledge that tourism creates traffic congestion problems for residents.

Negative Statements (% Agree)	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	
Creates traffic congestion problems for residents	86%	82%	82%	76%	78%	
Brings too many people to Hilton Head Island	65%	59%	58%	53%	55%	
Negatively impacts our natural resources	61%	57%	57%	51%	54%	
Causes local restaurant & entertainment prices to rise	49%	52%	58%	52%	53%	

/

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

MM
GY

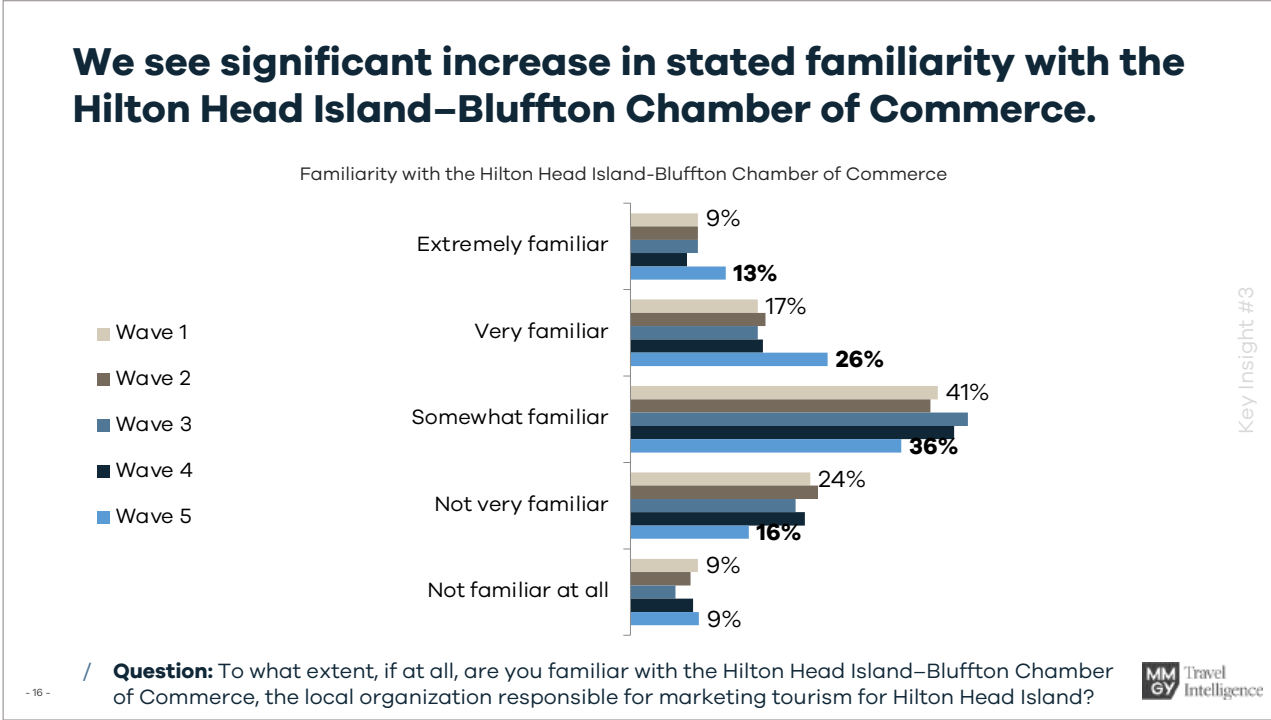
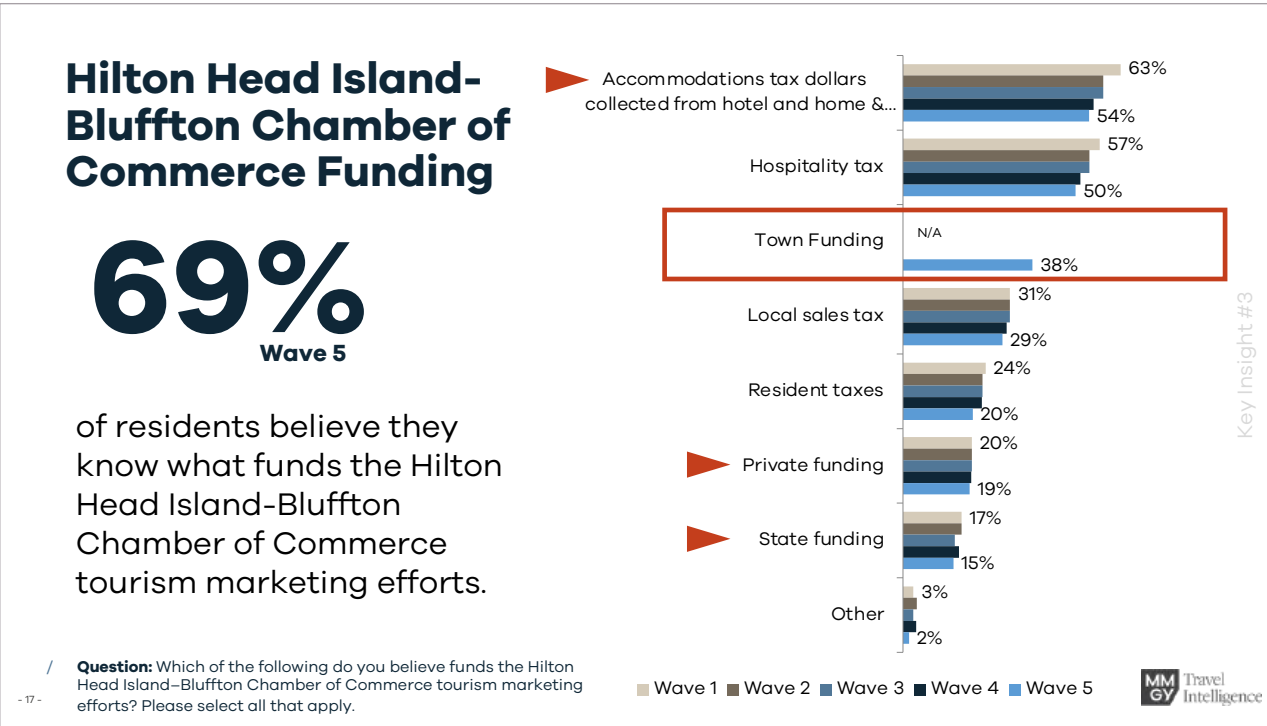
Travel
Intelligence

Key Insight #2

Key

INSIGHT #3

Familiarity with the Hilton Head Island-Bluffton Chamber of Commerce rose significantly versus Wave 4, with the majority of local residents saying they're at least somewhat familiar.



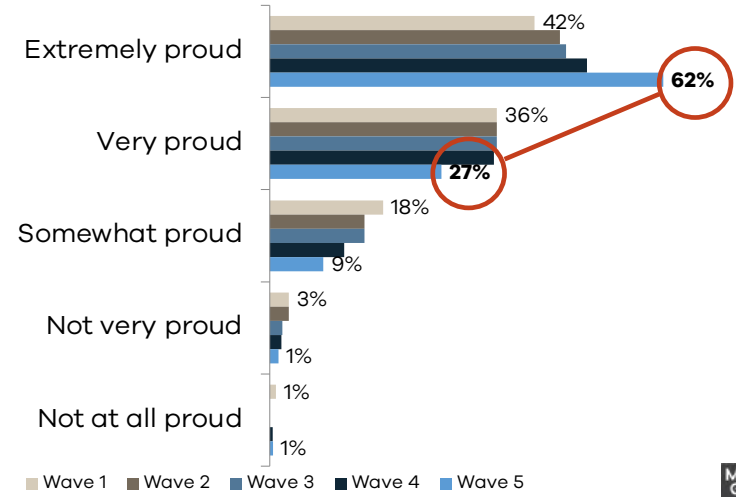
Key

INSIGHT #4

Resident pride rose significantly compared to previous wave, with 6 in 10 residents saying they're extremely proud to live on Hilton Head Island.

Pride rose to an all time high, with 89% of residents saying they are extremely/very proud to be residents of Hilton Head Island.

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



Key Insight #4

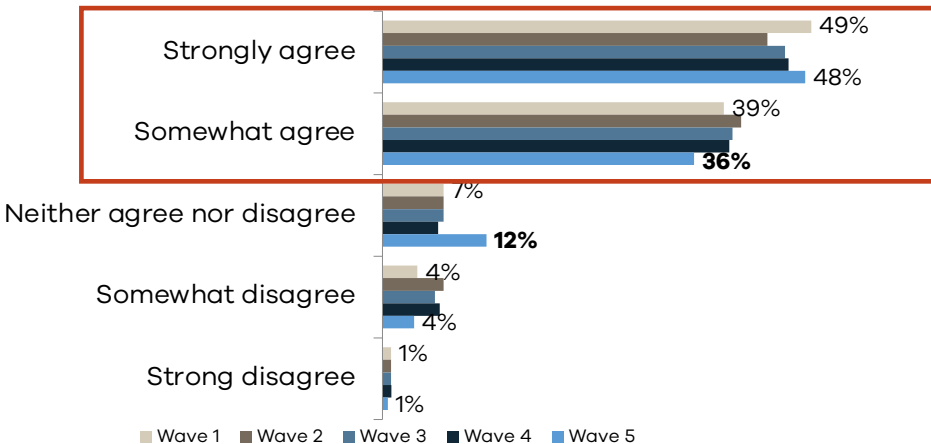
Perceived Quality of Hilton Head Island Experiences

Top 2 Box	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Beaches	91%	92%	92%	94%	94%
Golf courses	91%	91%	92%	93%	93%
Leisure pathways and bike trails	86%	86%	87%	88%	89%
Outdoor/nature activities	80%	82%	82%	84%	84%
Savannah/Hilton Head International Airport	79%	80%	82%	82%	85%
Outdoor public spaces for festivals and events	69%	77%	81%	83%	82%
Water sports/activities	77%	79%	79%	80%	80%
Community parks	70%	77%	78%	77%	78%
Hilton Head Island Airport	55%	57%	58%	57%	63%
Retail shopping	49%	54%	52%	57%	55%
Road quality	42%	44%	51%	59%	54%
Playing fields for sports leagues, tournaments and competitions	44%	48%	50%	51%	51%
Museums/Cultural attractions	38%	43%	47%	49%	47%
Public pools/aquatic centers	27%	32%	31%	31%	32%
Indoor facilities for sports leagues, tournaments and competitions	18%	22%	23%	24%	26%

Key Insight #4

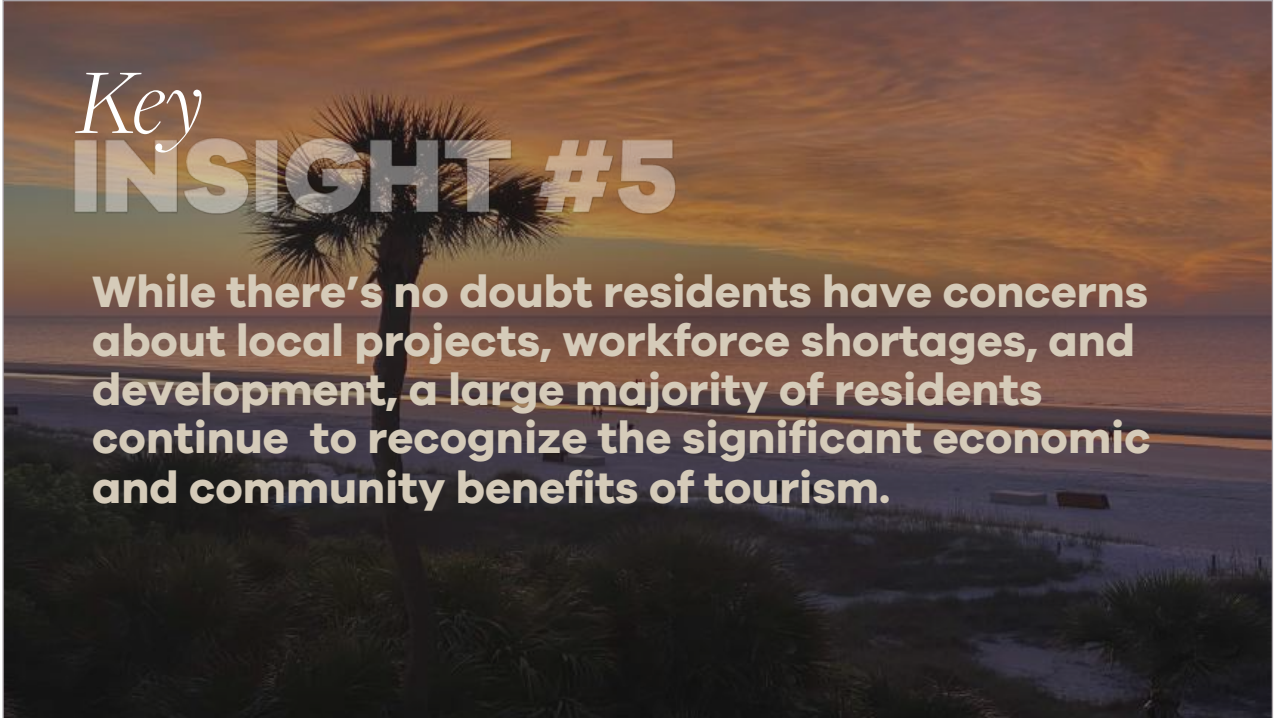
Question: Please indicate your perception of the quality of the following services, products and infrastructure on Hilton Head Island to serve visitors and residents alike.

84% of residents agree that Hilton Head Island is a very safe place to live.



Key Insight #4

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



Top Concerns Facing The Community

	Wave 2	Wave 3	Wave 4	Wave 5
278 Corridor project	38%	39%	40%	51%
Workforce shortage	48%	44%	40%	43%
Overall development	29%	34%	33%	43%
On-island workforce housing	36%	35%	33%	33%
Short-term rental noise and parking	16%	18%	21%	32%
General infrastructure needs (e.g. water/sewer, roads, other utilities)	20%	18%	20%	28%
Repurposing/modernizing Island commercial buildings	14%	14%	14%	17%
Sea Pines Circle/Coligny Traffic	16%	17%	17%	14%
Mid-Island initiative and redevelopment (Northridge Plaza, Port Royal Plaza, Mid-Island Park)	12%	12%	11%	13%
Arts and development of cultural assets (e.g. Mitchelville Freedom Park)	4%	4%	4%	4%
Other	9%	10%	9%	6%
None of the above	0%	1%	1%	1%

*South-end traffic in previous years

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



Key Insight #5

Summary Positive Aspects of Tourism

Economic Benefits

- Support for local businesses
- Lower property taxes
- Decreased economic burden on residents
- Helps create jobs

Amenities

- Variety of amenities supported by tourism
- Restaurants, parks and outdoor areas, golf courses and cultural activities
- Infrastructure improvements

Family Friendly and Safety

- Family-oriented atmosphere and amenities
- High level of safety



Key Insight #5

Summary Negative Aspects of Tourism

Overcrowding

- Congestion, traffic and limited parking
- Overcrowding highest during summer months

Quality of Visitor

- Day visitors mentioned most often
- Concern around disrespect to the environment and ignoring bike and traffic laws

Overdevelopment

- Possibly leading to overpopulation
- Increase of short-term rentals

Rising Prices

- Limited affordable housing
- Prices as high as large metropolitan areas



Key Insight #5



Overall...

81%

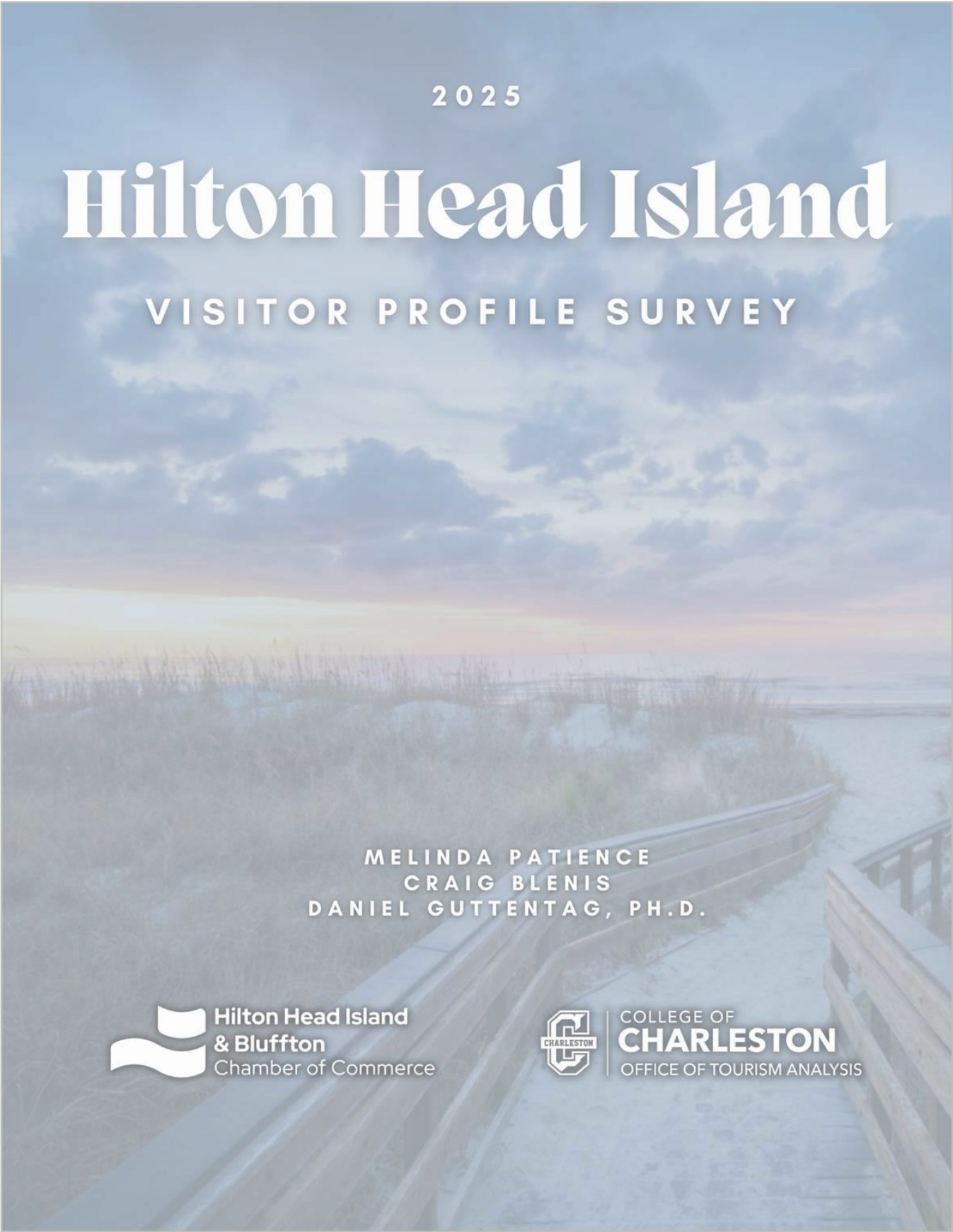
of residents consider themselves passionate advocates for Hilton Head Island.



Key Insight #5



**OFFICE OF TOURISM ANALYSIS,
COLLEGE OF CHARLESTON**
2025 Visitor Profile Study



Hilton Head Island Visitor Profile Survey

2025

PREPARED FOR:

HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

BY:

OFFICE OF TOURISM ANALYSIS
BENNETT SCHOOL OF HOSPITALITY AND TOURISM MANAGEMENT
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TABLE OF CONTENTS

Executive Summary 1

Methodology..... 4

Visitors’ Demographic and Geographic Profile 5

Demographics5

Point of Origin6

Survey Findings 9

Sample Demographics9

Sample Point of Origin 10

Travel to the Hilton Head Island / Bluffton Area 12

Hilton Head Island Visitors 13

Travel Planning 27

Non-Visitors..... 30

Travel Behavior – All Respondents 32

Appendix 35

All ZIP Codes Collected by MSA 35

EXECUTIVE SUMMARY

VISITOR AND SAMPLE DEMOGRAPHICS

Baby Boomers (62+ years old) represented 56.8% of the survey respondents, followed by Millennials (30-45 years old) (20.5%), Gen X (46-61 years old) (18.8%), and then Gen Z (19-29 years old) (2.5%). The visitor intelligence company Zartico, which analyzes geolocation data, estimates visitor age follows a somewhat similar pattern, with visitors 45-64 years old being the largest segment (35.0%), followed by 25-44 years old (32.0%), 65 years old and up (24.0%), and then 18-24 years old (8.0%). Over 64% of those surveyed had a Bachelor’s degree or higher, and more than 79% had an annual household income of \$75,000 or more. Zartico also estimates that visitors have high household incomes, with 71.0% earning \$81,000 or more. Approximately 80% of the respondents were married.

POINT OF ORIGIN

The respondents resided in 294 geographic areas (Metropolitan Statistical Areas) across the U.S., from the East Coast to the West Coast. More respondents resided in Ohio than in any other state (12.5%). Second was Pennsylvania (6.6%), followed by North Carolina (6.2%), New York (5.6%), Georgia (5.4%), and Illinois (5.3%). Data provider Placer.ai, which like Zartico also analyzes geolocation data, estimates the top states of visitor origin to be Georgia (16.8%), North Carolina (10.3%), Ohio (8.8%), New York (6.4%), and Virginia (6.4%). In-state visitors represented 8.2% of the survey respondents.

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ; Chicago-Naperville-Elgin, IL-IN; Atlanta-Sandy Springs-Roswell, GA; Charlotte-Concord-Gastonia, NC-SC; Cincinnati, OH-KY-IN; Pittsburgh, PA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Columbus, OH; Minneapolis-St. Paul-Bloomington, MN-WI; and Akron, OH. Both Zartico and Placer.ai estimate the top 10 metropolitan areas to be Atlanta, GA; Charlotte, NC; New York, NY; Greenville-Spartanburg-Anderson, SC-Asheville, NC; Columbia, SC; Augusta, GA-Aiken, SC; Raleigh-Durham-Fayetteville, NC; Cleveland-Akron-Canton, OH; Washington, DC-Hagerstown, MD; and Charleston, SC.

Canada was the top origin market amongst international respondents (69.2%), followed by Europe (15.4%) and the Caribbean (7.7%).



THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (76.0%), relaxation (61.4%), and spending time with family and friends (46.6%). These motivations were followed by culinary experience (16.1%), biking (13.2%), shopping (10.5%), nature-based activities (10.4%), golf (8.0%), and heritage attractions (6.9%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include historical tours, water excursions, and arts performances or exhibits.

Among Hilton Head Island’s overnight visitors, 37.6% indicated they were visiting Hilton Head Island for the first time, suggesting that the destination continues to appeal to new visitors.

TRIP CHARACTERISTICS

The average group size of those surveyed was 3.6 for overnight visitors and 4.7 for day trip visitors. The main mode of transportation to and around the island continues to be personal/family car (68.3%), followed by various modes of flying to the destination (22.1%). The majority of visitors fly into Hilton Head Island Airport, followed by Savannah/Hilton Head Island International Airport.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.7 nights, hotel visitors stayed 6.4 nights, timeshare visitors stayed 7.3 nights, and second homeowners stayed 9.1 nights. The overall average was 6.9 nights.



Villa/home rentals stood out as the most popular choice of paid accommodation for overnight visitors (38.5%), followed by resorts (22.6%), timeshare units (17.8%), and hotels (11.9%).

TRAVEL PLANNING

VRBO was the most popular online booking platform for villas/homes (29.1%), followed by local vacation rental companies (25.1%), Airbnb (14.2%), and the local resorts’ online booking platforms (e.g., Sea Pines, Palmetto Dunes) (12.4%).

Savannah, Charleston, Myrtle Beach, Outer Banks, and Tybee Island were the top competitors for Hilton Head Island as alternative beach destinations. The top competing market was Savannah.



The top reasons for choosing Hilton Head Island were previous visit experience (56.8%), wanting to visit a beach destination (50.2%), wanting to visit someplace new (24.0%), word-of-mouth recommendation (23.7%), and wanting to visit someplace within driving distance from home (22.8%).

Of those visitors surveyed, 88.2% 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=331), 53.5% had never visited the Hilton Head Island / Bluffton area before, and 39.6% had visited one to five times before.

Of those non-visitors, 39.3% traveled elsewhere, 34.7% plan to visit in the future, 6.6% found it too expensive, 3.6% mentioned health reasons, and 1.2% didn’t find what they were looking. Only 0.9% did not travel at all. Alternative destinations of those who did not visit the Hilton Head Island / Bluffton area included destinations most commonly in the Southeast (48.9%) and West (24.2%). Nonetheless, 51.1% of the non-visitors indicated they had plans to visit the Hilton Head Island / Bluffton area within one year.

TRAVEL BEHAVIOR

Looking at the travel behavior of both visitors and non-visitors together, the majority (59.4%) 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: beaches (75.9%), relaxation and rejuvenation (73.2%), historic attractions (51.4%), passive outdoor adventures (47.3%), and romantic couple getaways (37.9%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (90.7%), ease of access (89.3%), quality of lodging options (88.1%), affordability (86.9%), and quality of dining options (86.7%).

METHODOLOGY

The 2025 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid- January 2025 and January 2026, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited www.hiltonheadisland.org or www.visitbluffton.org and submitted their email addresses, and they were contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted multiple times during the same period on the Hilton Head Island Visitor & Convention Bureau's and Explore Bluffton's social media channels.

A total of 1,539 completed surveys were collected. This report is largely based on the 1,086 respondents who visited Hilton Head Island as an overnight or day trip, along with 331 individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton. The remaining 122 responses were individuals who only visited Bluffton and are covered in a separate report.

This report represents the results of the present study, together with comparative results from the last five times this study was completed, examining visitation in 2019, 2021, 2022, 2023, and 2024. 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 and for 2021 through 2025. 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	2023	2024	2025	%Chg vs 2021	%Chg vs 2022	%Chg vs 2023	%Chg vs 2025
Villa/Home Rentals	962,686	951,126	920,345	834,495	795,108	-17.4%	-16.4%	-13.6%	-4.7%
Hotels/Resorts	508,977	497,574	481,328	453,826	408,261	-19.8%	-17.9%	-15.2%	-10.0%
Timeshares	481,934	481,461	477,628	483,070	476,094	-1.2%	-1.1%	-0.3%	-1.4%
Second Homeowners	719,302	710,673	674,278	652,215	603,999	-16.0%	-15.0%	-10.4%	-7.4%
Non-paying Guests	186,667	184,428	174,983	169,258	156,745	-16.0%	-15.0%	-10.4%	-7.4%
Day trippers	267,290	264,083	255,358	242,361	228,346	-14.6%	-13.5%	-10.6%	-5.8%
Total Visitors	3,126,856	3,089,346	2,983,919	2,835,224	2,668,553	-14.7%	-13.6%	-10.6%	-5.9%

Table 1: Visitor Estimates for 2021-2025 and Percent Change Comparison

VISITORS' DEMOGRAPHIC AND GEOGRAPHIC PROFILE

The profile characteristics presented in this section are derived from smartphone-based geolocation data provided by Zartico and Placer.ai.

DEMOGRAPHICS

	2025
Income	
Less than \$20,000	3.0%
\$21,000-\$40,000	6.0%
\$41,000-\$60,000	8.0%
\$61,000-\$80,000	12.0%
\$81,000-\$100,000	13.0%
\$101,000-\$150,000	23.0%
\$151,000+	35.0%
Age	
18-24	8.0%
25-34	15.0%
35-44	17.0%
45-54	18.0%
55-64	17.0%
65+	24.0%

Table 2: Demographics(Zartico)

Origin Market	% of Visitors	Origin Market	% of Visitors
Atlanta GA	8.6%	Nashville TN	1.3%
Charlotte NC	7.0%	Tampa-St. PetersburgSarasota FL	1.2%
New York NY	5.8%	Detroit MI	1.2%
GreenvilleSpartanburgAnderson SCAsheville NC	4.5%	Savannah GA	1.1%
Columbia SC	3.3%	Indianapolis IN	1.1%
Raleigh-Durham-Fayetteville NC	3.2%	Tri-Cities TN-VA	1.0%
Cleveland-AkronCanton OH	3.2%	Macon GA	0.9%
Washington DCHagerstown MD	3.2%	RichmondPetersburg VA	0.8%
Charleston SC	2.6%	RoanokeLynchburg VA	0.8%
Augusta GA	2.5%	Lexington KY	0.8%
Philadelphia PA	2.4%	NorfolkPortsmouthNewport News VA	0.8%
Columbus OH	2.2%	Louisville KY	0.8%
Chicago IL	2.1%	Myrtle BeachFlorence SC	0.8%
Pittsburgh PA	2.1%	HarrisburgLancaster-LebanonYork PA	0.7%
Baltimore MD	2.1%	Dayton OH	0.7%
Cincinnati OH	1.9%	Hartford-New Haven CT	0.6%
Boston MAManchester NH	1.7%	Miami-Ft. Lauderdale FL	0.6%
GreensboroHigh PointWinston Salem NC	1.6%	St. Louis MO	0.6%
Jacksonville FL	1.6%	Los Angeles CA	0.5%
Buffalo NY	1.4%	Chattanooga TN	0.5%
Knoxville TN	1.4%	Charleston-Huntington WV	0.5%
Orlando-Daytona BeachMelbourne FL	1.3%	AlbanySchenectady-Troy NY	0.5%

Table 3: Visitor Origin by Market(Zartico)

POINT OF ORIGIN

Visitor Origin by State

State	% of Visitors	State	% of Visitors	State	% of Visitors
Georgia	16.84%	California	1.22%	Maine	0.21%
South Carolina	11.30%	Alabama	1.04%	Vermont	0.17%
North Carolina	10.25%	Maryland	1.04%	Nebraska	0.15%
Ohio	8.83%	Wisconsin	0.97%	Kansas	0.15%
New York	6.44%	West Virginia	0.93%	Nevada	0.14%
Virginia	6.43%	Colorado	0.81%	Oregon	0.13%
Florida	5.72%	Minnesota	0.81%	Louisiana	0.13%
Pennsylvania	5.29%	Connecticut	0.65%	N/A	0.12%
Tennessee	3.52%	Arizona	0.45%	South Dakota	0.08%
Illinois	2.76%	Mississippi	0.41%	New Mexico	0.07%
Michigan	2.09%	Iowa	0.36%	North Dakota	0.07%
Kentucky	2.04%	Washington	0.31%	Idaho	0.06%
Massachusetts	1.99%	Rhode Island	0.28%	Montana	0.05%
Texas	1.85%	Oklahoma	0.26%	Hawaii	0.03%
Indiana	1.56%	Utah	0.24%	Alaska	0.02%
Missouri	1.47%	Arkansas	0.23%	Wyoming	0.02%

Table 4: Visitor Origin by State (Placer.ai)

Visitor Origin by DMA

DMA Name	% of Visitors	DMA Name	% of Visitors
Atlanta	10.3%	Macon	1.1%
Charlotte	6.0%	Tampa-St. Pete (Sarasota)	1.1%
New York	4.9%	Indianapolis	1.1%
Greenvll-Spart-Ashevl-And	4.8%	Baltimore	0.9%
Augusta-Aiken	3.7%	Lexington	0.9%
Columbia, SC	3.0%	Dallas-Ft. Worth	0.9%
Washington, DC (Hagrstwn)	2.9%	Louisville	0.9%
Cleveland-Akron (Canton)	2.9%	St. Louis	0.8%
Charleston, SC	2.7%	Richmond-Petersburg	0.8%
Raleigh-Durham (Fayetteville)	2.3%	Minneapolis-St. Paul	0.8%
Cincinnati	2.3%	Chattanooga	0.7%
Chicago	2.3%	Myrtle Beach-Florence	0.7%
Philadelphia	2.1%	Roanoke-Lynchburg	0.7%
Columbus, OH	2.1%	Denver	0.7%
Pittsburgh	2.0%	Charleston-Huntington	0.7%
Boston (Manchester)	1.8%	Hartford & New Haven	0.7%
Knoxville	1.5%	Buffalo	0.6%
Orlando-Daytona Bch-Melbrn	1.4%	West Palm Beach-Ft. Pierce	0.6%
Savannah	1.3%	Miami-Ft. Lauderdale	0.6%
Nashville	1.2%	Harrisburg-Lncstr-Leb-York	0.6%
Tri-Cities, TN-VA	1.2%	Los Angeles	0.5%
Greensboro-H.Point-W.Salem	1.2%	Norfolk-Portsmth-Newpt Nws	0.5%
Jacksonville	1.2%	Birmingham (Ann and Tusc)	0.5%
Detroit	1.2%	Dayton	0.5%

DMA Name	% of Visitors	DMA Name	% of Visitors
Grand Rapids-Kalmzoo-B.Crk	0.5%	N/A	0.1%
Milwaukee	0.5%	Gainesville	0.1%
Ft. Myers-Naples	0.4%	Paducah-Cape Girard-Harsbg	0.1%
Wilmington	0.4%	Colorado Springs-Pueblo	0.1%
Kansas City	0.4%	Springfield, MO	0.1%
Houston	0.4%	Las Vegas	0.1%
Toledo	0.4%	Erie	0.1%
Phoenix (Prescott)	0.4%	Traverse City-Cadillac	0.1%
Rochester, NY	0.3%	Portland, OR	0.1%
Youngstown	0.3%	Omaha	0.1%
San Francisco-Oak-San Jose	0.3%	Parkersburg	0.1%
Wilkes Barre-Scranton-Hztn	0.3%	Tulsa	0.1%
Providence-New Bedford	0.3%	Clarksburg-Weston	0.1%
Albany-Schenectady-Troy	0.3%	Davenport-R.Island-Moline	0.1%
Greenville-N.Bern-Washngtn	0.3%	Salisbury	0.1%
Columbus, GA (Opelika, AL)	0.3%	Ft. Smith-Fay-Sprngdl-Rgrs	0.1%
Memphis	0.2%	Wichita-Hutchinson Plus	0.1%
Huntsville-Decatur (Flor)	0.2%	Tucson (Sierra Vista)	0.1%
Seattle-Tacoma	0.2%	Bowling Green	0.1%
Salt Lake City	0.2%	Montgomery-Selma	0.1%
Tallahassee-Thomasville	0.2%	Panama City	0.1%
Green Bay-Appleton	0.2%	Terre Haute	0.1%
Austin	0.2%	Rockford	0.1%
Madison	0.2%	Albuquerque-Santa Fe	0.1%
Evansville	0.2%	Lima	0.1%
Syracuse	0.2%	Sioux Falls(Mitchell)	0.1%
Johnstown-Altoona-St Colge	0.2%	Columbia-Jefferson City	0.1%
Champaign&Sprngfld-Decatur	0.2%	Waco-Temple-Bryan	0.1%
Des Moines-Ames	0.2%	La Crosse-Eau Claire	0.1%
Mobile-Pensacola (Ft Walt)	0.2%	Columbus-Tupelo-West Point	0.1%
Bluefield-Beckley-Oak Hill	0.2%	Jackson, MS	0.05%
Burlington-Plattsburgh	0.2%	Zanesville	0.05%
Albany, GA	0.2%	Lincoln & Hastings-Krny	0.05%
Ft. Wayne	0.2%	Spokane	0.05%
Portland-Auburn	0.2%	Bangor	0.05%
South Bend-Elkhart	0.2%	Elmira (Corning)	0.05%
Springfield-Holyoke	0.2%	Fargo	0.05%
Oklahoma City	0.1%	Shreveport	0.05%
Lansing	0.1%	Tyler-Longview(Lfkn&Ncgd)	0.04%
Charlottesville	0.1%	Lafayette, IN	0.04%
San Diego	0.1%	Dothan	0.04%
Flint-Saginaw-Bay City	0.1%	Boise	0.04%
Cedar Rapids-Wtrlo-IWC&Dub	0.1%	Binghamton	0.04%
San Antonio	0.1%	Utica	0.04%
Sacramnto-Stkton-Modesto	0.1%	Baton Rouge	0.04%
Little Rock-Pine Bluff	0.1%	Reno	0.04%
Wheeling-Steubenville	0.1%	Topeka	0.03%
Peoria-Bloomington	0.1%	Jackson, TN	0.03%
Harrisonburg	0.1%	Honolulu	0.03%

DMA Name	% of Visitors	DMA Name	% of Visitors
Watertown	0.03%	Rapid City	0.01%
Amarillo	0.03%	Butte-Bozeman	0.01%
Duluth-Superior	0.03%	Lake Charles	0.01%
Sioux City	0.03%	Meridian	0.01%
Rochestr-Mason City-Austin	0.03%	Monroe-El Dorado	0.01%
Monterey-Salinas	0.03%	Chico-Redding	0.01%
Joplin-Pittsburg	0.03%	Corpus Christi	0.01%
Quincy-Hannibal-Keokuk	0.03%	Beaumont-Port Arthur	0.01%
Yakima-Pasco-Rchlnd-Knnwck	0.03%	Cheyenne-Scottsbluff	0.01%
Wausau-Rhinelande	0.02%	Anchorage	0.01%
El Paso (Las Cruces)	0.02%	Ottumwa-Kirksville	0.01%
Grand Junction-Montrose	0.02%	Wichita Falls & Lawton	0.01%
Sherman-Ada	0.02%	Bakersfield	0.01%
Bismarck-Mnt-Dcknsn(Wlstn)	0.02%	Harlingen-Wslco-Brnsvl-Mca	0.01%
Marquette	0.02%	Bend, OR	0.01%
Palm Springs	0.02%	Twin Falls	0.01%
Eugene	0.02%	Alexandria, LA	0.01%
Lubbock	0.02%	Yuma-El Centro	0.01%
Biloxi-Gulfport	0.02%	St. Joseph	0.01%
Mankato	0.02%	Greenwood-Greenville	0.01%
Santabarbra-Sanmar-Sanluob	0.02%	Helena	0.01%
Lafayette, LA	0.02%	Casper-Riverton	0.01%
Fresno-Visalia	0.02%	San Angelo	0.01%
Odessa-Midland	0.02%	Juneau	0.005%
Jonesboro	0.02%	Medford-Klamath Falls	0.004%
Billings	0.02%	Laredo	0.003%
Idaho Fals-Pocatllo(Jcks)	0.02%	Great Falls	0.002%
Missoula	0.02%	Presque Isle	0.001%
Hattiesburg-Laurel	0.02%	Fairbanks	0.001%
Abilene-Sweetwater	0.02%		

Table 5: Visitor Origin by Market (Placer.ai)

SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021	2022	2023	2024	2025
Gender						
Female	67.4	62.5%	48.8%	54.1%	49.0%	64.2%
Male	32.6	37.4%	51.1%	45.7%	50.7%	35.6%
Self-identify	-	0.1%	-	0.3%	0.3%	0.1%
Marital Status						
Married	76.7%	76.7%	77.3%	86.4%	72.7%	80.0%
Single	8.5%	9.2%	9.9%	6.7%	14.9%	6.9%
Divorced	7.4%	7.7%	5.8%	3.4%	6.6%	7.1%
Widowed	3.1%	5.3%	5.9%	2.8%	4.3%	5.5%
Separated	0.5%	1.1%	1.1%	0.7%	1.5%	0.5%
Living as Married	3.8%	-	-	-	-	-
Education (highest level completed)						
Grade School	0.2%	0.7%	0.4%	0.9%	0.6%	0.4%
High School	8.0%	8.0%	6.5%	3.8%	7.2%	7.9%
Some College	19.6%	20.9%	21.5%	22.6%	24.0%	14.3%
Associate’s Degree (2 years)	13.1%	13.6%	13.2%	16.0%	14.2%	12.6%
Bachelor’s Degree (4 years)	31.5%	32.9%	32.3%	33.0%	35.2%	37.3%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%	18.8%	27.5%
Age						
19 years or younger	0.1%	0.1%	0.1%	0.3%	0.6%	0.1%
20 to 29 years	0.9%	10.5%	23.8%	24.1%	33.0%	2.4%
30 to 39 years	5.9%	16.5%	28.8%	39.4%	32.1%	8.0%
40 to 49 years	15.3%	12.6%	13.1%	8.3%	12.1%	12.5%
50 to 59 years	26.8%	18.7%	10.9%	9.4%	7.1%	18.8%
60 to 69 years	34.4%	25.8%	14.2%	11.6%	8.6%	31.8%
70 years and over	15.9%	14.5%	8.6%	6.3%	6.0%	25.0%
Prefer not to say	0.6%	1.4%	0.3%	0.5%	0.5%	1.5%
Household Income						
Under \$24,999	1.4%	2.3%	1.5%	1.1%	3.2%	1.4%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%	5.8%	2.7%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%	9.9%	5.0%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%	18.4%	11.4%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%	21.0%	15.8%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%	22.0%	25.6%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%	9.7%	16.8%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%	5.0%	9.6%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%	5.0%	11.8%
Not Applicable	18.8%	-	-	-	-	-
N	1,682	1,884	1,913	1,154	1,040	1,539

Table 6: Demographics

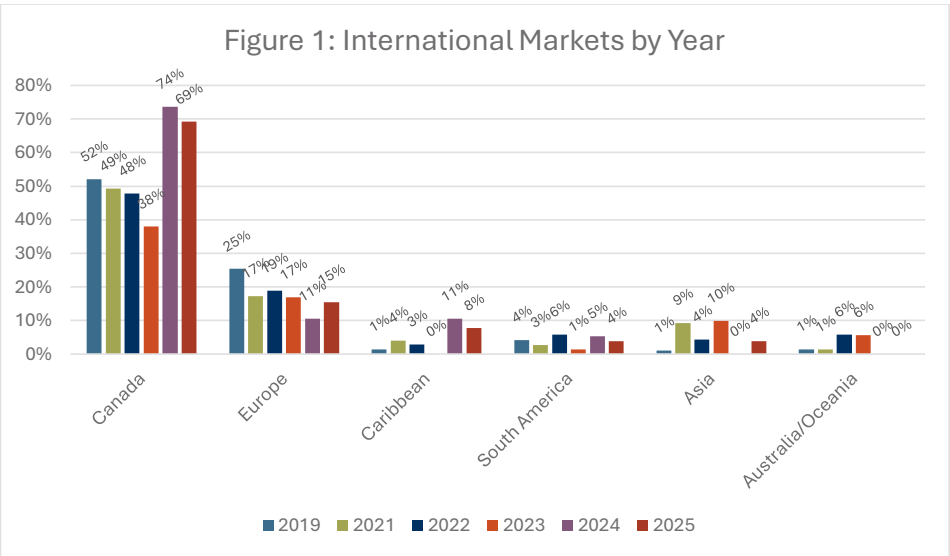
SAMPLE POINT OF ORIGIN

ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	New York-Newark-Jersey City, NY-NJ	71	4.6%
2	Chicago-Naperville-Elgin, IL-IN	57	3.7%
3	Atlanta-Sandy Springs-Roswell, GA	44	2.9%
4	Charlotte-Concord-Gastonia, NC-SC	40	2.6%
5	Cincinnati, OH-KY-IN	40	2.6%
6	Rural OH	39	2.5%
7	Pittsburgh, PA	37	2.4%
8	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	35	2.3%
9	Columbus, OH	34	2.2%
10	Minneapolis-St. Paul-Bloomington, MN-WI	31	2.0%
11	Akron, OH	30	1.9%
12	Hilton Head Island-Bluffton-Port Royal, SC	29	1.9%
13	Boston-Cambridge-Newton, MA-NH	26	1.7%
14	Dallas-Fort Worth-Arlington, TX	24	1.6%
15	Greenville-Anderson-Greer, SC	23	1.5%
16	Washington-Arlington-Alexandria, DC-VA-MD-WV	22	1.4%
17	Indianapolis-Carmel-Greenwood, IN	20	1.3%
18	Louisville/Jefferson County, KY-IN	20	1.3%
19	Toledo, OH	19	1.2%
20	Myrtle Beach-Conway-North Myrtle Beach, SC	18	1.2%
21	St. Louis, MO-IL	18	1.2%
22	Augusta-Richmond County, GA-SC	17	1.1%
23	Columbia, SC	16	1.0%
24	Grand Rapids-Wyoming-Kentwood, MI	16	1.0%
25	Asheville, NC	15	1.0%
26	Detroit-Warren-Dearborn, MI	14	0.9%
27	Milwaukee-Waukesha, WI	14	0.9%
28	Baltimore-Columbia-Towson, MD	13	0.8%
29	Buffalo-Cheektowaga, NY	13	0.8%
30	Rochester, NY	13	0.8%
	Other	731	47.5%
	N	1,539	

Table 7: ZIP Code Analysis – Top 30 MSAs

International Markets

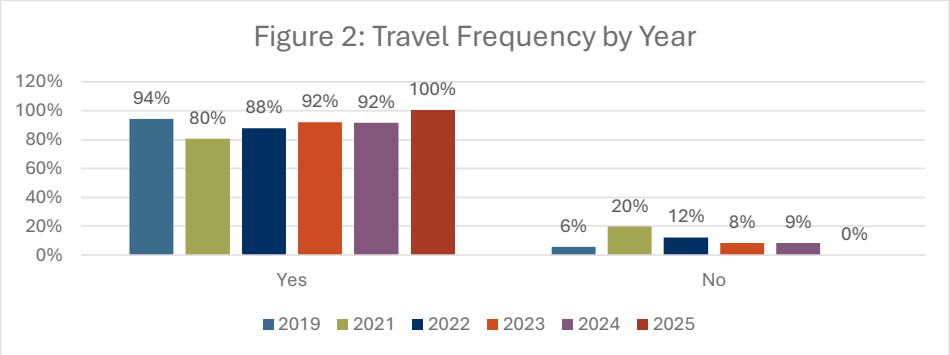


	2019	2021	2022	2023	2024	2025
Canada	52.1%	49.3%	47.8%	38.0%	73.7%	69.2%
Europe	25.4%	17.3%	18.8%	16.9%	10.5%	15.4%
Caribbean	1.4%	4.0%	2.9%	-	10.5%	7.7%
South America	4.2%	2.7%	5.8%	1.4%	5.3%	3.8%
Asia	1.0%	9.3%	4.3%	9.9%	-	3.8%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%	-	-
Africa	2.1%	6.7%	7.2%	1.4%	-	-
Antarctica	-	2.7%	-	-	-	-
Central America	8.5%	1.3%	-	-	-	-
Middle East	-	5.3%	7.2%	26.8%	-	-
N	71	75	69	71	19	26

Table 8: International Markets by Year

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

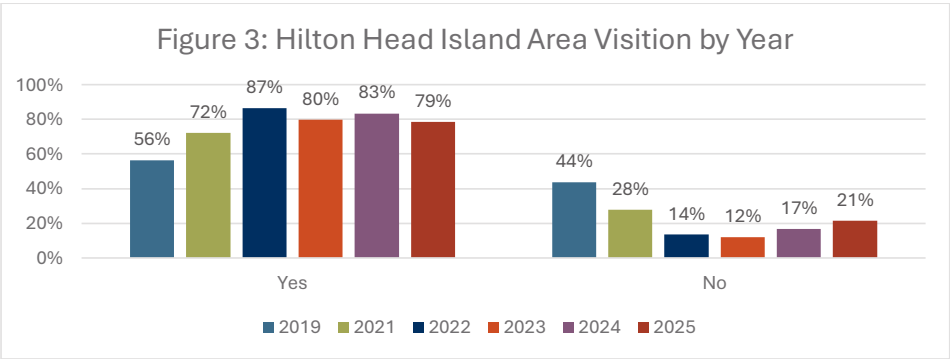
Within the last 12 months have you traveled or taken a vacation?¹



	2019	2021	2022	2023	2024	2025
Yes	94.3%	80.4%	87.8%	91.8%	91.5%	100.0%
No	5.7%	19.6%	12.2%	8.2%	8.5%	-
N	1,684	2,084	2,918	1,710	1,040	1,539

Table 9: Travel Frequency by Year

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



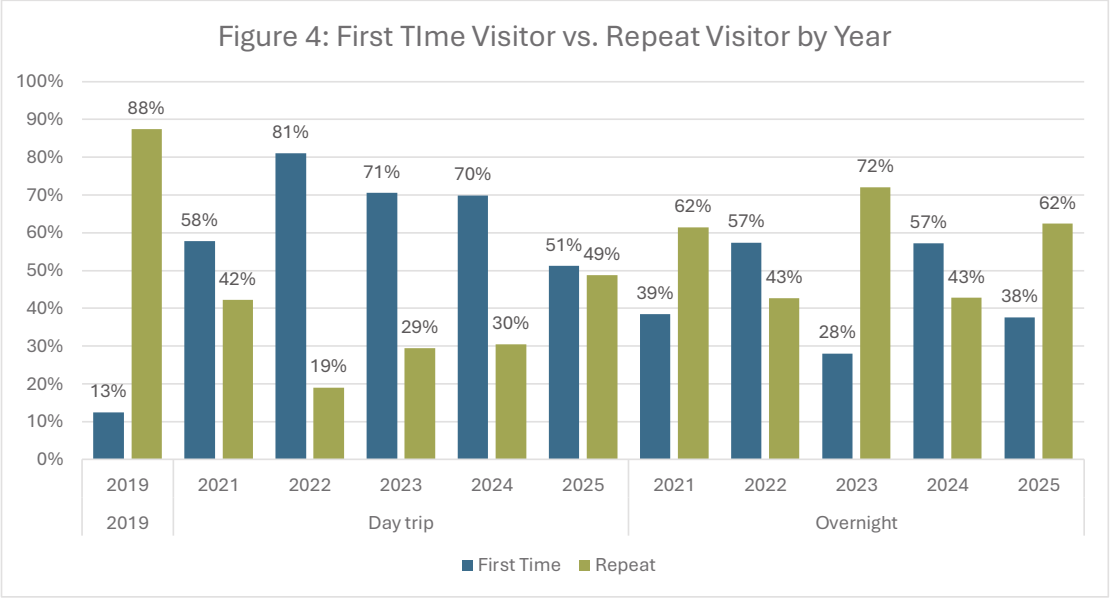
	2019	2021	2022	2023	2024	2025
Yes	56.4%	72.3%	86.5%	79.8%	83.4%	78.6%
No	43.6%	27.7%	13.5%	12.0%	16.6%	21.4%
N	1,713	1,675	2,547	1,570	952	1,539

Table 10: Hilton Head Island Area Visitation by Year

¹ 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 subsequent years it was just asked of those who had travelled.

HILTON HEAD ISLAND VISITORS

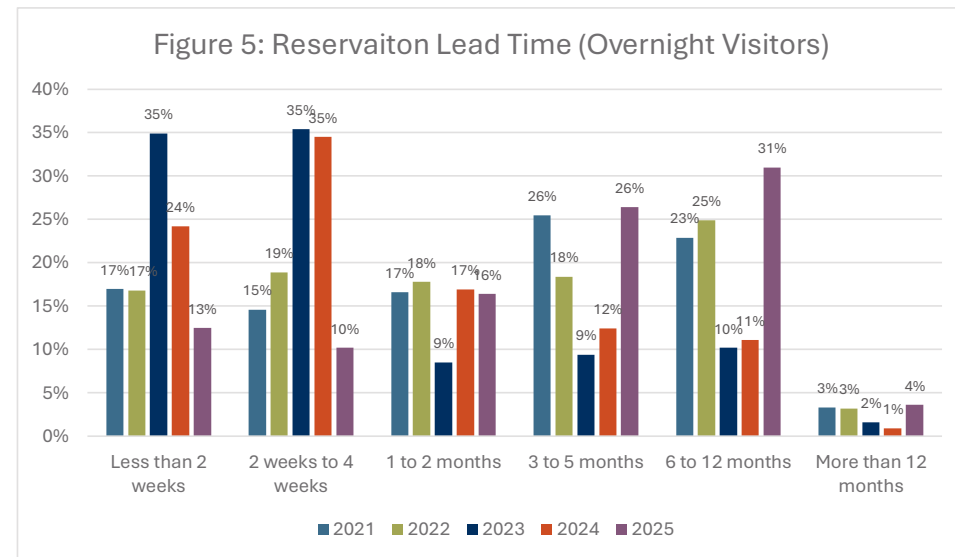
Was this your first time visiting Hilton Head Island?



	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Yes	12.5%	38.5%	57.8%	57.4%	81.0%	28.0%	70.6%	57.2%	69.9%	37.6%	51.2%
No	87.5%	61.5%	42.2%	42.6%	19.0%	72.0%	29.4%	42.8%	30.4%	62.4%	48.8%
N	946	991	45	1,477	79	1,077	34	547	23	1,043	43

Table 11: First Time Visitors vs. Repeat Visitors by Year

Approximately how long before your trip to Hilton Head Island did you make your first reservation?



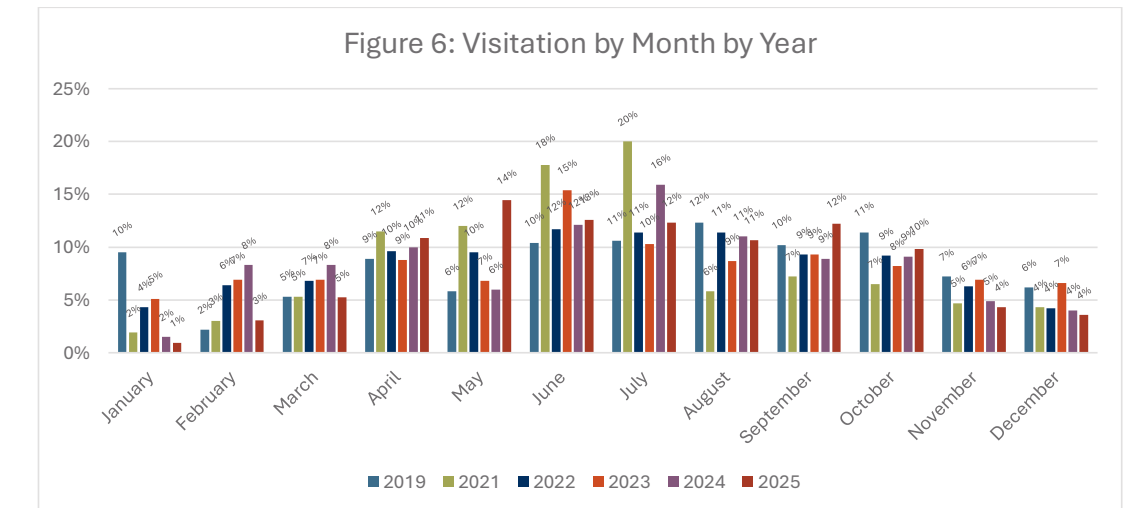
	2021	2022	2023	2024	2025
Less than 2 weeks	17.0%	16.8%	34.9%	24.2%	12.5%
2 weeks to 4 weeks	14.6%	18.9%	35.4%	34.5%	10.2%
1 to 2 months	16.6%	17.8%	8.5%	16.9%	16.4%
3 to 5 months	25.5%	18.4%	9.4%	12.4%	26.4%
6 to 12 months	22.9%	24.9%	10.2%	11.1%	31.0%
More than 12 months	3.3%	3.2%	1.6%	0.9%	3.6%
N	991	1,479	1,076	550	1,036

Table 12: Reservation Lead Time

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

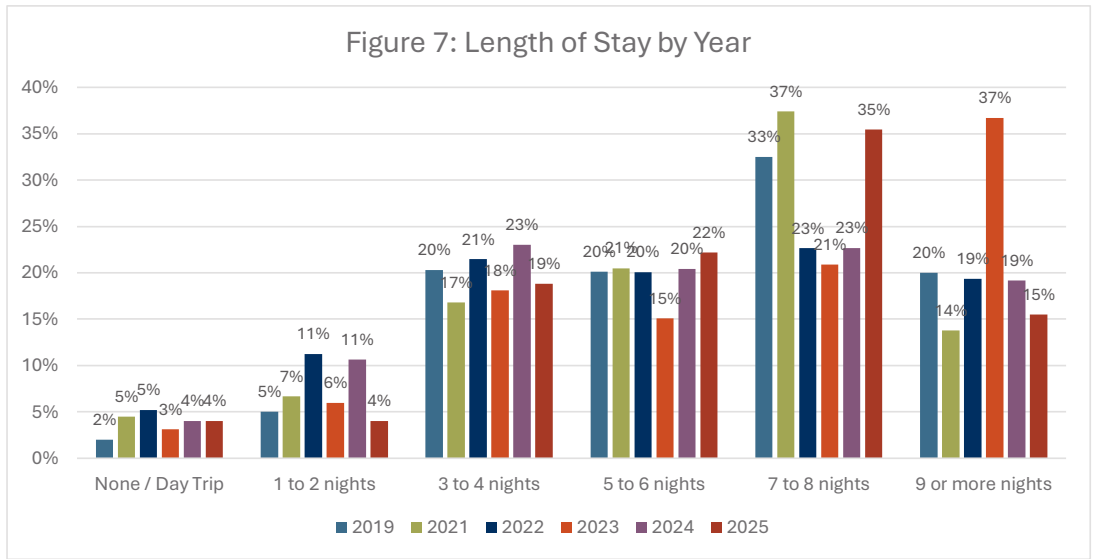
	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
January	9.5%	1.9%	-	4.3%	4.3%	5.1%	3.0%	1.5%	-	0.9%	-
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	-	8.3%	4.8%	3.1%	5.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%	8.3%	4.8%	5.2%	17.5%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%	10.0%	9.5%	10.9%	7.5%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%	6.0%	23.8%	14.4%	20.0%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%	12.1%	9.5%	12.6%	10.0%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%	15.9%	9.5%	12.3%	5.0%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%	11.0%	4.8%	10.7%	2.5%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%	8.9%	4.8%	12.2%	10.0%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%	9.1%	28.6%	9.8%	15.0%
November	7.2%	4.7%	-	6.3%	2.9%	6.9%	-	4.9%	-	4.3%	5.0%
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%	4.0%	-	3.6%	2.5%
N	951	1,504	34	1,361	70	1,044	33	529	21	976	40

Table 13: 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 and subsequent surveys, data collection occurred on a continuous basis throughout the year.

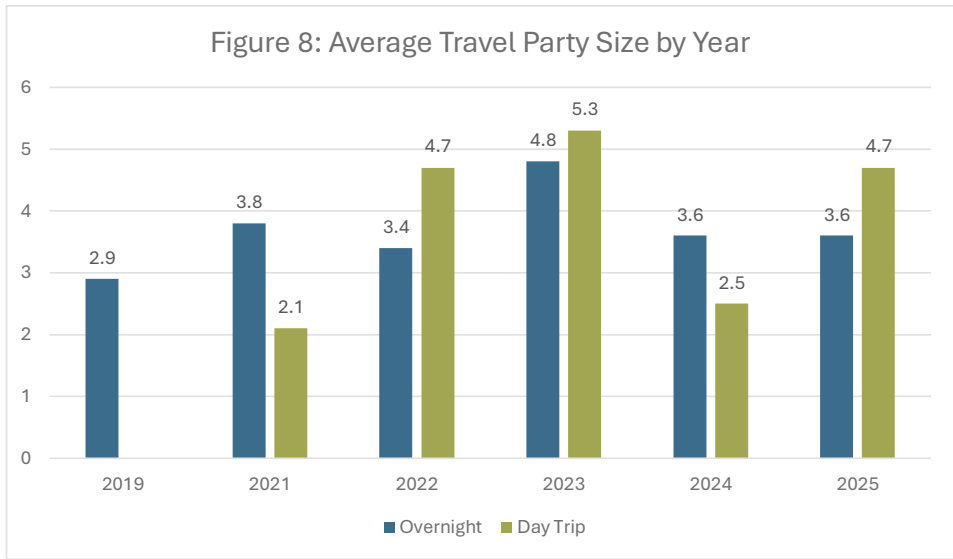
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023	2024	2025
None/day trip only	2.0%	4.5%	5.2%	3.1%	4.0%	4.0%
1 night	1.9%	1.8%	2.4%	0.4%	1.9%	1.1%
2 nights	3.1%	4.9%	8.9%	5.6%	8.7%	2.9%
3 nights	10.3%	7.5%	11.3%	10.2%	11.3%	8.3%
4 nights	10.0%	9.3%	10.2%	7.9%	11.7%	10.4%
5 nights	7.7%	9.6%	10.5%	7.5%	11.5%	9.6%
6 nights	12.4%	10.9%	9.5%	7.6%	8.9%	12.6%
7 nights	30.4%	34.0%	19.3%	15.4%	19.0%	31.5%
8 nights	2.1%	3.4%	3.4%	5.5%	3.7%	3.9%
9 nights	2.3%	2.6%	1.8%	3.7%	3.0%	1.5%
10 nights	3.4%	3.1%	3.2%	3.7%	5.8%	4.0%
11 nights	0.5%	0.4%	1.3%	2.6%	1.6%	0.5%
12 nights	0.8%	0.9%	1.4%	3.7%	1.6%	1.1%
13 nights	0.6%	0.7%	0.8%	2.9%	1.0%	0.8%
14 nights	4.8%	4.2%	3.6%	4.4%	3.5%	3.3%
15 nights	0.5%	0.8%	1.1%	2.9%	0.9%	0.5%
More than 15 nights	7.1%	1.1%	6.2%	12.8%	1.9%	3.8%
N	950	996	1,519	1,103	573	1090

Table 14: Length of Stay by Year

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



	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Average	2.9	3.8	2.1	3.4	4.7	4.8	5.3	3.6	2.5	3.6	4.7
N	951	995	45	1,477	79	1,042	30	551	23	1,044	44

Table 15: Travel Party Size by Year

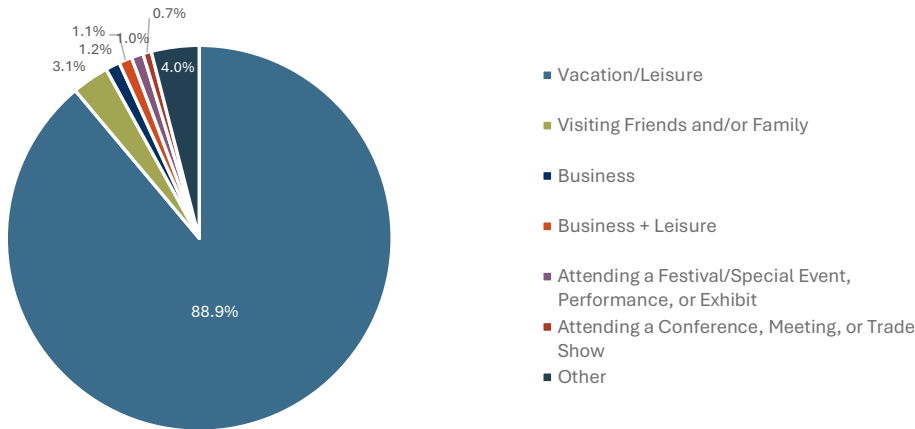
Please indicate by age category how many people were in your travel party.

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	72.2%	9.0%	10.2%	3.5%	1.3%	1.3%	1.0%
	18-24	87.5%	5.7%	3.5%	1.0%	0.4%	0.1%	0.5%
	25-34	85.2%	5.1%	4.9%	1.6%	0.6%	0.7%	0.6%
	35-44	78.6%	5.7%	10.9%	1.6%	1.2%	0.4%	0.2%
	45-54	77.6%	10.3%	9.2%	0.6%	0.4%	0.5%	0.1%
	55-64	66.6%	14.3%	15.5%	1.0%	0.9%	0.1%	0.3%
	65+	46.0%	15.7%	31.7%	1.7%	2.4%	0.1%	1.0%
Day Trip	Under 18	70.5%	15.9%	2.3%	-	-	4.5%	-
	18-24	77.3%	9.1%	4.5%	-	-	-	2.3%
	25-34	84.1%	4.5%	-	2.3%	-	-	2.3%
	35-44	79.5%	6.8%	4.5%	-	-	-	2.3%
	45-54	63.6%	13.6%	9.1%	4.5%	-	-	2.3%
	55-64	61.4%	11.4%	15.9%	2.3%	-	2.3%	-
	65+	47.7%	11.4%	25.0%	2.3%	2.3%	-	4.5%

Table 16: Travel Party by Age Group

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

Figure 9: Trip Purpose of Overnight Visitors



	2021	2022	2023	2024	2025
Vacation/Leisure	82.1%	74.3%	87.1%	77.1%	88.8%
Visiting Friends and/or Family	3.9%	5.0%	2.7%	4.2%	3.1%
Business	2.1%	5.3%	2.5%	3.8%	1.2%
Business + Leisure	6.7%	6.9%	4.4%	9.8%	1.1%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%	2.5%	0.7%	1.5%	1.0%
Attending a Conference, Meeting, or Trade Show	2.3%	4.2%	1.1%	2.9%	0.7%
Other	1.9%	1.7%	1.4%	0.4%	4.0%
N	995	1,491	1,081	551	1,056

Table 17: 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	2024	2025
Part of a vacation	57.8%	72.2%	76.5%	73.9%	79.1%
Day trip from home	42.2%	27.8%	23.5%	26.1%	20.9%
N	45	79	34	15	43

Table 18: Day Trip as Part of a Vacation or Day Trip from Home

Where did you stay overnight?

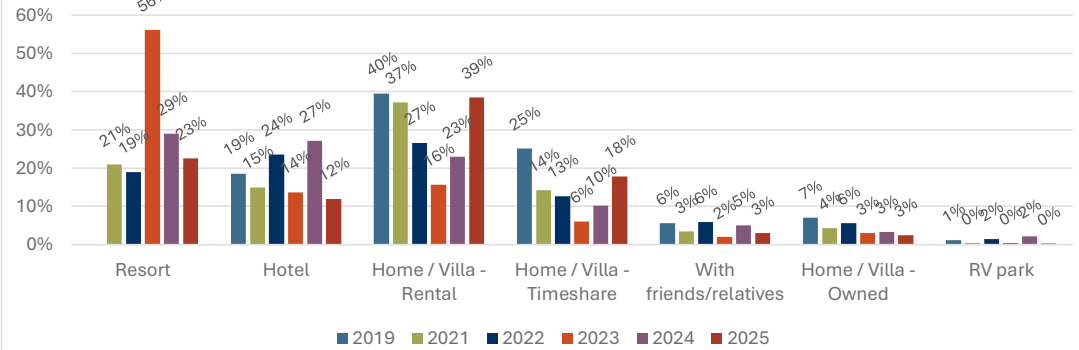
	2021	2022	2023	2024	2025
Savannah	42.3%	19.3%	23.1%	26.7%	50.0%
Charleston	19.2%	50.9%	26.9%	26.7%	11.8%
Beaufort	19.2%	14.0%	15.4%	6.7%	14.7%
Tybee Island	7.7%	10.5%	19.2%	6.7%	8.8%
Jacksonville	3.8%	3.5%	11.5%	20.0%	-
Fripp Island	3.8%	-	-	-	-
Other	3.8%	1.8%	3.8%	13.3%	-
N	26	57	26	15	29

Table 19: Day Trip Visitors' Overnight Location

Overnight Visitors:

What was your primary form of accommodation while visiting Hilton Head Island?

Figure 10: Type of Accommodation by Year



	2019	2021	2022	2023	2024	2025
Home / Villa - Rental	39.5%	37.2%	26.6%	15.6%	23.0%	38.5%
Resort	-	20.9%	19.0%	56.1%	29.0%	22.6%
Home / Villa - Timeshare	25.2%	14.2%	12.7%	6.1%	10.2%	17.8%
Hotel	18.6%	15.0%	23.6%	13.7%	27.2%	11.9%
With friends/relatives	5.6%	3.4%	5.9%	2.0%	5.1%	3.0%
Home / Villa - Owned	7.1%	4.3%	5.6%	3.0%	3.3%	2.5%
RV park	1.1%	0.4%	1.5%	0.4%	2.2%	0.3%
Other	1.4%	0.3%	0.1%	-	-	3.4%
N	951	1,040	1,570	1,115	551	1,044

Table 20: Types of Accommodation by Year

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

Hilton Beachfront Resort & Spa	16.2%
Omni Resort	15.0%
Hampton inn	8.3%
Sonesta	7.5%
Beach House Resort	3.8%
Doubletree	3.8%
Holiday Inn Express	3.4%
The Westin	2.6%
HHI Beach & Tennis Resort	2.3%
Marriott Barony Beach	2.3%
N	176

Table 21: Top 10 Hotels or Resorts

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

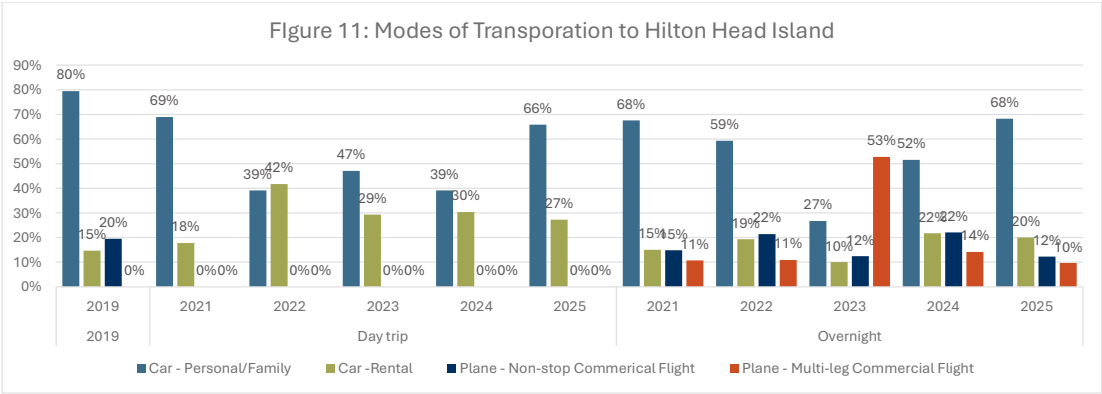
	2019	2021	2022	2023	2024	2025
VRBO	32.8%	34.2%	29.2%	32.3%	22.6%	29.1%
Local company	22.7%	22.9%	24.7%	22.2%	33.6%	25.1%
Airbnb	2.4%	10.0%	12.0%	10.2%	15.8%	14.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%	17.1%	12.4%
Vacasa	-	4.9%	5.5%	6.6%	3.4%	5.5%
Booking.com	-	0.3%	2.2%	0.6%	1.4%	1.2%
TurnKey	-	1.3%	-	3.0%	2.1%	0.0%
HomeAway	-	2.2%	3.5%	4.2%	0.7%	0.0%
Directly with owner	-	6.2%	6.0%	-	-	0.0%
I don't remember	3.5%	0.8%	3.0%	1.2%	1.4%	2.0%
None	-	0.5%	0.5%	0.6%	2.1%	0.5%
Other	23.5%	1.6%	0.5%	8.4%	-	10.0%
N		371	401	167	146	402

Table 22: Booking Platforms for Home/Villa Rental

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

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Car - Personal/Family	79.50%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%	51.5%	39.1%	68.3%	65.9%
Car - Rental	14.70%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%	21.8%	30.4%	20.1%	27.3%
Plane - Non-stop commercial flight	19.5% ²	14.8%	-	21.5%	-	12.4%	-	22.1%	-	12.4%	-
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-	14.2%	-	9.7%	-
Personal RV	1.10%	2.2%	-	4.9%	1.3%	1.9%	17.6%	5.1%	17.4%	1.1%	-
Motor Coach/Tour bus	-	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%	10.0%	21.7%	0.5%	-
Plane - Private	0.20%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%	2.2%	21.7%	0.3%	2.3%
Other	0.60%	0.6%	-	0.1%	-	0.2%	-	0.2%	-	1.2%	2.3%
N	953	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 23: Modes of Transportation to Hilton Head Island



² The 2019 survey did not divide commercial flights into non-stop and multi-leg, so the stated percentage is for all commercial flights.

Visitors Arriving by Plane:

At which airport did you land?

	2019	2021	2022	2023	2024	2025
Hilton Head Island	12.8%	39.8%	33.8%	81.6%	31.7%	50.5%
Savannah/Hilton Head Island International	69.5%	40.6%	38.1%	12.1%	56.5%	40.7%
Charleston	9.2%	8.8%	12.7%	3.3%	5.3%	3.6%
Atlanta	2.8%	5.6%	6.1%	1.4%	-	2.6%
Jacksonville	1.4%	2.0%	5.5%	1.1%	2.8%	1.0%
Charlotte	1.4%	2.0%	3.3%	0.3%	2.0%	0.8%
Other	2.8%	1.2%	0.4%	0.3%	2.0%	0.8%
N	114	251	488	728	246	386

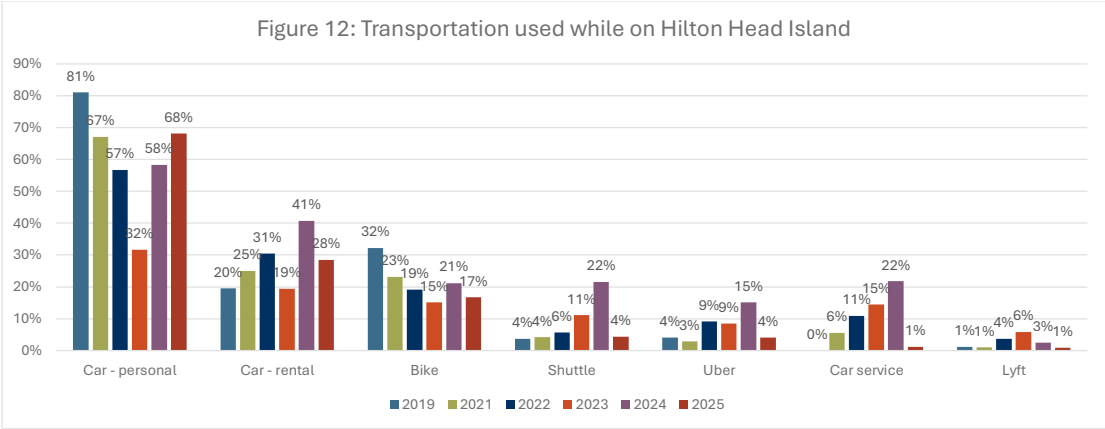
Table 24: Arrival Airport by Year

Which commercial airline did you use?

	2021	2022	2023	2024	2025
American Airlines	38.9%	44.8%	25.4%	59.3%	30.7%
Delta	16.6%	7.0%	2.6%	3.3%	18.9%
Southwest	8.1%	9.0%	14.2%	7.5%	18.9%
JetBlue	6.5%	3.6%	12.2%	3.3%	8.8%
Allegiant	10.1%	8.1%	2.1%	3.3%	3.5%
Breeze	1.2%	3.2%	1.4%	2.5%	3.1%
Alaska	2.8%	10.4%	1.7%	8.3%	0.9%
Frontier	1.6%	2.3%	11.9%	2.9%	0.9%
Silver Airways	0.8%	1.8%	14.2%	1.2%	0.9%
Sun Country Airlines	0.4%	0.9%	0.1%	-	0.9%
Air Canada	5.3%	6.8%	12.8%	7.5%	0.0%
Spirit	0.4%	0.2%	-	-	0.0%
United	6.9%	1.8%	-	0.8%	0.0%
Other	-	-	-	-	12.7%
N	247	442	720	241	228

Table 25: Commercial Airlines Used

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



	2019	2021	2022	2023	2024	2025
Car - personal	81.1%	67.1%	56.7%	31.7%	58.3%	68.2%
Car - rental	19.5%	25.0%	30.5%	19.4%	40.7%	28.4%
Bike	32.2%	23.2%	19.1%	15.2%	21.2%	16.7%
Shuttle offered by the hotel/resort	3.7%	4.2%	5.7%	11.1%	21.6%	4.4%
Uber	4.1%	2.9%	9.2%	8.5%	15.1%	4.1%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%	6.8%	12.5%	23.4%	3.9%
Car service	-	5.5%	10.9%	14.5%	21.8%	1.1%
On Foot	-	1.4%	1.3%	0.8%	-	1.2%
Lyft	1.1%	1.0%	3.7%	5.8%	2.5%	0.9%
Other	-	0.1%	0.1%	-	0.7%	1.4%
N	948	995	1,477	1,115	551	1,044

Table 26: Transportation Used While on Hilton Head Island

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	\$266	\$413	\$344	\$217	\$186	\$70	\$327
Lodging	\$3,225	\$1,372	\$1,417	\$0	\$0	\$0	\$2,242
Food - Dining	\$785	\$573	\$578	\$406	\$315	\$213	\$630
Food - Grocery	\$274	\$202	\$210	\$238	\$164	\$83	\$234
Shopping	\$353	\$382	\$322	\$334	\$409	\$190	\$353
Spas	\$145	\$164	\$100	\$80	\$65	\$50	\$147
Golf	\$374	\$305	\$164	\$67	\$58	\$30	\$284
Biking	\$145	\$113	\$30	\$20	\$20	\$10	\$105
Performance/Visual Arts	\$147	\$145	\$48	\$50	\$50	\$50	\$120
Festivals	\$86	\$84	\$19	\$50	\$46	\$60	\$70
Museums/Historical Tours	\$99	\$185	\$49	\$25	\$25	\$114	\$125
Boating/Sailing/Fishing	\$278	\$249	\$166	\$65	\$70	\$10	\$238
Nature-based Activities	\$89	\$106	\$10	\$70	\$44	\$30	\$87
Dolphin Tours	\$115	\$119	\$48	\$30	\$30	\$57	\$104
Tennis	\$78	\$82	\$50	\$25	\$40	\$20	\$69
Other Expenses	\$152	\$146	\$89	\$96	\$57	\$30	\$134
Total Expenditure	\$4,688	\$2,681	\$2,079	\$1,063	\$979	\$444	\$3,168

Table 27: 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		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Beaches	73.5%	75.4%	55.6%	62.0%	38.0%	40.7%	44.1%	61.9%	47.8%	76.0%	51.2%
Relaxation	58.6%	51.5%	31.1%	34.1%	12.7%	31.7%	20.6%	31.8%	13.0%	61.4%	46.5%
Time with family/friends	48.4%	46.6%	24.4%	32.6%	10.1%	22.2%	26.5%	32.1%	34.8%	46.6%	34.9%
Culinary	13.9%	12.2%	31.1%	14.2%	27.8%	14.3%	20.6%	8.3%	8.7%	16.1%	9.3%
Biking	15.7%	16.4%	11.1%	21.3%	27.8%	17.4%	11.8%	17.1%	21.7%	13.2%	4.7%
Shopping	11.7%	10.9%	24.4%	10.7%	8.9%	14.3%	20.6%	11.1%	8.7%	10.5%	37.2%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	11.3%	12.0%	2.2%	13.3%	3.8%	19.5%	23.5%	22.9%	0.0%	10.4%	9.3%
Golf	16.3%	13.7%	8.9%	10.4%	13.9%	14.1%	2.9%	11.3%	8.7%	8.0%	4.7%
Heritage attractions / Museum / Historical tours	3.3%	6.5%	20.0%	10.6%	16.5%	6.1%	32.4%	13.4%	17.4%	6.9%	0.0%
Boating / Sailing / Kayaking	1.6%	7.5%	11.1%	13.6%	16.5%	12.3%	26.5%	22.5%	8.7%	4.7%	0.0%
Parks	1.4%	1.8%	6.7%	4.9%	5.1%	11.1%	2.9%	5.6%	4.3%	3.2%	4.7%
Health/wellness/fitness	2.1%	3.4%	11.1%	5.9%	6.3%	13.1%	8.8%	5.8%	0.0%	3.1%	0.0%
Festivals	4.0%	3.6%	6.7%	8.2%	3.8%	11.6%	8.8%	10.0%	4.3%	2.3%	4.7%
Tennis	2.1%	1.7%	6.7%	2.6%	11.4%	3.9%	2.9%	2.4%	4.3%	2.2%	0.0%
Attend sporting event	0.6%	4.7%	15.6%	11.2%	10.1%	11.3%	2.9%	7.8%	4.3%	2.1%	0.0%
Business trip (convention, meeting, etc.)	1.2%	5.1%	4.4%	10.5%	24.1%	13.1%	2.9%	11.3%	13.0%	1.2%	2.3%
Wedding	-	1.2%	-	1.6%	-	0.9%	2.9%	2.7%	0.0%	0.9%	0.0%
Other	8.1%	4.1%	-	3.9%	2.5%	1.8%	5.9%	2.2%	8.7%	8.4%	9.3%
N	953	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 28: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Beaches	83.2%	81.8%	42.2%	69.4%	51.9%	46.0%	44.1%	67.5%	30.4%	87.2%	55.8%
Relaxation	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%	42.1%	26.1%	80.2%	46.5%
Shopping	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%	50.1%	26.1%	67.2%	58.1%
Time with family/friends	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%	40.3%	39.1%	64.1%	32.6%
Culinary	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%	21.8%	4.3%	36.7%	23.3%
Biking	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%	36.7%	30.4%	31.6%	7.0%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%	33.0%	21.7%	29.0%	14.0%
Museum / Historical tours	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%	24.3%	21.7%	20.9%	0.0%
Water excursions	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%	19.4%	17.4%	15.2%	7.0%
Golf	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%	18.5%	4.3%	12.6%	0.0%
Health / Wellness / Fitness	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%	15.4%	0.0%	10.4%	0.0%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%	14.7%	13.0%	8.6%	0.0%
Festivals	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%	16.2%	13.0%	7.5%	9.3%
Tennis	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%	5.8%	4.3%	4.8%	2.3%
Sports activities	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%	8.0%	4.3%	4.3%	2.3%
Attend sporting event	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%	7.3%	13.0%	3.3%	2.3%
Spas	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%	13.1%	4.3%	3.1%	0.0%
Business/work	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%	15.1%	13.0%	1.9%	2.3%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%	3.3%	0.0%	1.1%	0.0%
Other	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%	1.3%	17.4%	6.6%	2.3%
N	950	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 29: Activities Visitors Participated In

Which shopping locations did you visit?

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Coligny Plaza	68.8%	64.7%	26.7%	54.4%	32.9%	31.6%	23.5%	47.0%	13.0%	70.6%	30.2%
Harbour Town	60.2%	55.8%	26.7%	44.2%	39.2%	29.2%	23.5%	39.0%	13.0%	59.5%	18.6%
Shelter Cove Harbour	47.8%	42.0%	17.8%	36.9%	21.5%	23.0%	20.6%	29.0%	13.0%	47.7%	14.0%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%	25.0%	8.9%	21.2%	29.4%	30.3%	13.0%	37.9%	2.3%
Tanger Outlets	53.2%	34.9%	37.8%	26.1%	22.8%	19.6%	5.9%	20.5%	8.7%	32.4%	16.3%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%	25.5%	6.3%	18.1%	35.3%	26.0%	26.1%	31.7%	7.0%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%	21.7%	20.3%	18.3%	20.6%	19.6%	8.7%	31.0%	14.0%
Downtown Bluffton	30.5%	25.4%	28.9%	31.1%	34.2%	20.4%	38.2%	40.5%	52.2%	25.5%	41.9%
Main Street Village	25.0%	20.2%	8.9%	24.6%	25.3%	14.9%	20.6%	26.0%	4.3%	20.2%	16.3%
South Beach Marina	25.2%	21.5%	11.1%	17.7%	15.2%	14.9%	23.5%	22.0%	13.0%	14.7%	4.7%
Village at Wexford	16.4%	10.9%	6.7%	12.8%	11.4%	10.9%	11.8%	12.7%	8.7%	9.4%	4.7%
Buckwalter shopping areas	2.9%	4.9%	11.1%	8.3%	10.1%	10.1%	8.8%	14.9%	13.0%	1.8%	4.7%
Other	5.5%	2.1%	2.2%	2.3%	1.3%	2.1%	67.6%	-	-	5.2%	14.0%
None	2.1%	1.5%	2.2%	0.7%	1.3%	0.7%	23.5%	1.3%	8.7%	1.3%	11.6%
N	950	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 30: Shopping Locations Visited

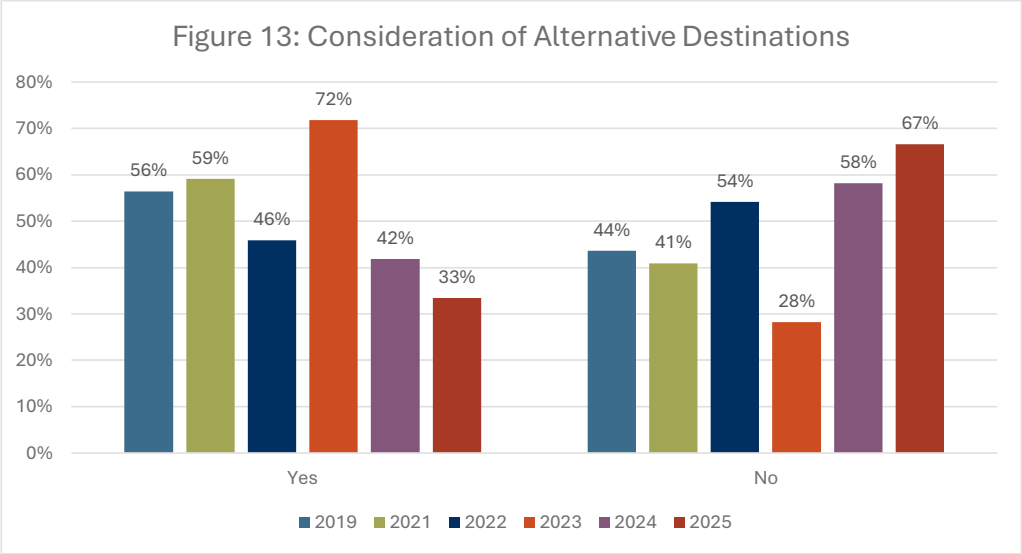
Did you visit any of the following cities while staying on Hilton Head Island?

	2021	2022	2023	2024	2025
Bluffton	37.0%	37.4%	66.2%	45.0%	38.3%
Savannah	29.3%	26.0%	16.0%	23.2%	34.3%
Beaufort	17.7%	23.2%	9.4%	19.8%	17.7%
Charleston	15.7%	20.8%	10.5%	23.6%	13.9%
Daufuskie Island	13.0%	17.1%	7.8%	18.7%	6.1%
Tybee Island	7.3%	10.0%	51.1%	16.5%	6.0%
Jacksonville	5.4%	11.3%	4.8%	15.6%	1.7%
Other	0.9%	0.5%	0.9%	0.5%	32.3%
I did not visit any other cities.	28.8%	20.1%	12.2%	18.0%	30.6%
N	995	1,477	1,115	551	1,044

Table 31: Other Cities Visited While on Hilton Head Island

TRAVEL PLANNING

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



	2019	2021	2022	2023	2024	2025
Yes	56.4%	59.1%	45.9%	71.8%	41.8%	33.4%
No	43.6%	40.9%	54.1%	28.2%	58.2%	66.6%
N	1,691	1,039	1,570	1,114	574	1,084

Table 32: Consideration of Alternative Destinations by Year

Which of the following destinations did you consider visiting?

	2019	2021	2022	2023	2024	2025
Savannah, GA	33.9%	20.0%	19.3%	11.3%	22.6%	29.7%
Charleston, SC	45.2%	24.2%	19.3%	8.5%	21.3%	28.9%
Myrtle Beach, SC	37.5%	20.5%	12.9%	7.0%	10.1%	28.6%
Outer Banks, NC	22.6%	28.9%	20.0%	12.3%	27.5%	26.9%
Tybee Island, GA	18.2%	14.6%	8.8%	6.3%	7.0%	18.4%
Orlando, FL	12.1%	19.3%	15.0%	9.5%	18.5%	17.0%
Gulf Shores, AL	14.9%	19.8%	28.1%	18.3%	26.1%	15.6%
Other	11.3%	13.2%	13.6%	12.4%	16.7%	14.7%
Sanibel Island, FL	13.7%	13.4%	13.8%	7.5%	15.7%	13.9%
The Florida Keys	19.4%	12.5%	8.5%	11.6%	7.7%	13.9%
Caribbean	12.5%	23.1%	20.4%	12.1%	29.6%	11.3%
Tampa/St. Petersburg, FL	10.1%	9.6%	6.5%	6.3%	8.7%	11.3%
Isle of Palms, SC	12.5%	18.1%	16.1%	6.9%	22.6%	10.5%
Jekyll Island, GA	12.5%	13.2%	10.1%	10.4%	11.1%	10.5%
Marco Island/Naples, FL	12.1%	14.4%	18.2%	11.8%	12.9%	9.6%
Kiawah Island, SC	14.1%	15.5%	10.8%	7.5%	13.9%	8.8%
Sarasota, FL	6.9%	7.3%	9.6%	6.9%	10.5%	8.5%
St. Simons Island, GA	-	10.1%	10.4%	7.6%	10.8%	8.2%
Hawaiian Islands	4.8%	15.8%	24.4%	14.4%	29.3%	7.1%
Sandestin, FL	8.5%	9.2%	13.1%	8.4%	12.5%	4.8%
Bluffton, SC	-	1.9%	4.4%	1.5%	5.2%	3.7%
Sea Island, GA	4.8%	10.4%	12.5%	9.4%	14.6%	3.4%
Napa/Sonoma, CA	2.8%	8.5%	8.9%	6.4%	11.8%	2.8%
Santa Fe, NM	1.6%	2.8%	4.0%	5.4%	7.0%	2.8%
Pinehurst, NC	3.2%	9.9%	12.2%	7.0%	9.8%	2.3%
Aspen, CO	2.0%	11.5%	10.1%	10.4%	13.2%	2.0%
Reynolds Plantation, GA	1.2%	8.9%	10.7%	8.3%	12.5%	1.7%
Telluride, CO	0.8%	7.8%	12.4%	10.3%	12.5%	1.4%
Alabama Golf Trail	1.6%	23.8%	31.9%	15.1%	27.5%	1.1%
Ponte Vedre, FL	3.6%	8.5%	8.9%	5.5%	12.9%	1.1%
Total	248	425	720	800	278	353

Table 33: Alternative Destinations by Year

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

	2019	2021	2022	2023	2024	2025
Had visited in the past and wanted to return.	80.3%	60.0%	42.5%	20.4%	40.6%	56.8%
Wanted to visit a beach destination.	48.3%	49.7%	45.7%	32.6%	52.3%	50.2%
Wanted to visit someplace new.	8.6%	18.1%	17.8%	10.6%	29.1%	24.0%
It was recommended by friends/family.	18.2%	24.1%	26.2%	12.2%	40.8%	23.7%
Wanted to visit some place within driving distance.	22.7%	23.9%	19.4%	7.9%	18.5%	22.8%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%	23.3%	23.4%	39.9%	11.3%
Wanted to visit heritage attractions.	4.6%	7.8%	20.3%	18.2%	32.6%	6.0%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%	10.1%	4.7%	19.2%	4.6%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%	9.9%	4.4%	18.3%	3.7%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%	9.3%	4.2%	7.8%	2.9%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%	6.3%	3.2%	14.1%	2.8%
Wanted to attend a sporting event.	1.7%	2.9%	4.3%	1.9%	6.6%	1.2%
Other	14.2%	8.5%	5.1%	2.9%	6.6%	12.2%
N	953	1,039	1,570	1,288	574	1,084

Table 34: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

	2021	2022	2023	2024	2025
Very likely	74.3%	62.7%	44.4%	53.7%	69.9%
Likely	15.0%	22.5%	24.3%	30.4%	18.3%
Neutral	7.6%	9.5%	17.2%	12.6%	6.8%
Unlikely	1.9%	3.7%	13.4%	2.2%	3.3%
Very Unlikely	1.3%	1.7%	0.6%	1.0%	1.7%
N	1,027	1,510	1,027	574	1,051

Table 35: Likelihood of Visiting Hilton Head Island Again

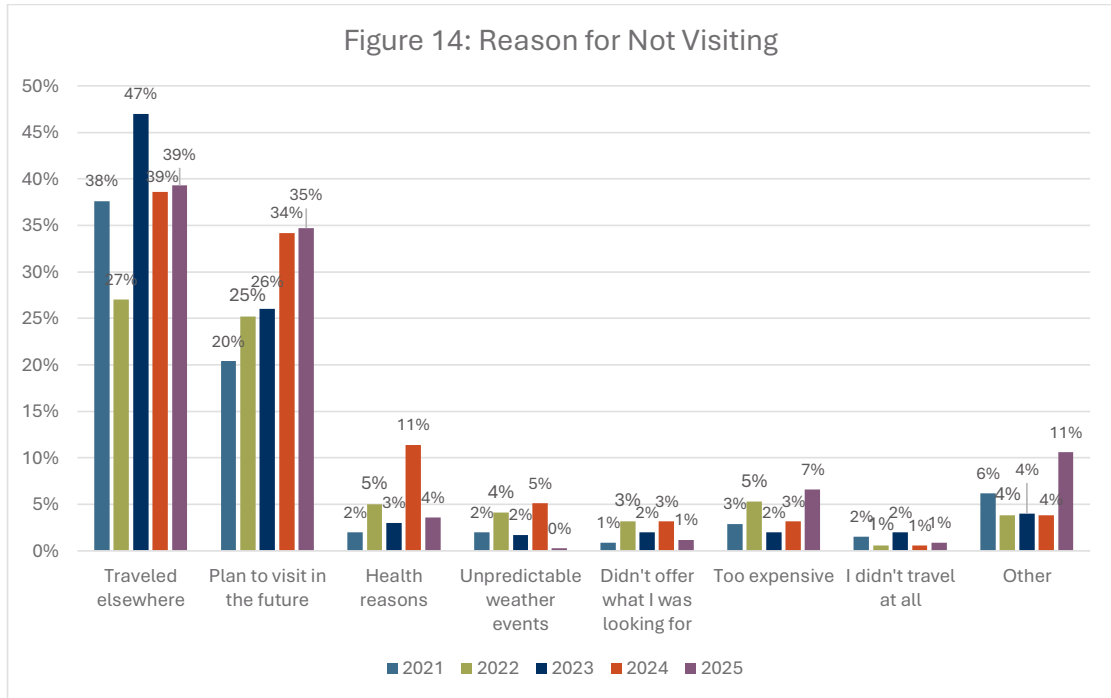
How likely are you to recommend visiting Hilton Head Island to a friend or family member?

	2021	2022	2023	2024	2025
Definitely Recommend	79.7%	70.2%	48.4%	65.6%	79.7%
Probably Recommend	14.9%	21.8%	22.8%	23.4%	12.4%
May or May Not Recommend	4.9%	6.2%	14.1%	9.0%	4.3%
Probably Not Recommend	0.5%	1.5%	14.4%	1.6%	1.3%
Definitely Not Recommend	-	0.2%	0.2%	0.3%	0.6%
N	1,034	1,522	1,039	574	1,071

Table 36: 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	2024	2025
Traveled elsewhere	37.6%	27.0%	47.0%	38.6%	39.3%
Plan to visit in the future	20.4%	25.2%	26.0%	34.2%	34.7%
Too expensive	2.9%	5.3%	2.0%	3.2%	6.6%
Health reasons	2.0%	5.0%	3.0%	11.4%	3.6%
Didn't offer what I was looking for	0.9%	3.2%	2.0%	3.2%	1.2%
Unpredictable weather events	2.0%	4.1%	1.7%	5.1%	0.3%
I didn't travel at all	1.5%	0.6%	2.0%	0.6%	0.9%
Other	6.2%	3.8%	4.0%	3.8%	10.6%
COVID-19 pandemic	26.5%	25.8%	7.0%	-	0.3%
N	860	341	100	158	331

Table 37: Reasons for Not Visiting

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

	2021	2022	2023	2024	2025
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%	34.4%	48.9%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%	25.5%	24.2%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%	14.0%	23.3%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%	23.6%	19.0%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%	33.1%	14.2%
Europe	1.2%	7.3%	10.0%	14.6%	11.5%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%	14.6%	10.3%
Latin America and Caribbean	2.1%	6.5%	6.0%	12.1%	8.2%
Canada	1.4%	10.9%	16.0%	16.6%	7.9%
Asia	0.5%	4.4%	8.0%	12.1%	0.9%
Africa	0.3%	1.2%	1.0%	2.5%	0.6%
Australia/New Zealand	0.2%	3.2%	6.0%	5.1%	0.0%
N	860	341	100	157	331

Table 38: Regions Visited by Non-Visitors in the Past 12 Months

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

	2021	2022	2023	2024	2025
Never visited	38.9%	42.9%	33.7%	29.7%	53.5%
1	18.6%	14.0%	9.5%	16.3%	14.5%
2 to 5	30.2%	36.4%	40.8%	45.5%	25.1%
6 to 10	9.8%	5.0%	13.6%	6.5%	4.8%
11 to 20	1.9%	0.9%	1.2%	1.6%	0.3%
21 or more	0.9%	0.5%	1.2%	0.4%	0.3%
N	860	341	169	246	331

Table 39: 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	2024	2025
Yes, within one year	49.2%	50.1%	48.8%	36.7%	51.1%
Yes, but not sure when	42.5%	49.0%	47.0%	55.9%	39.9%
No	8.3%	0.9%	4.2%	36.7%	6.9%
N	859	341	168	245	331

Table 40: Plans of visiting Hilton Head Island-Bluffton in the Future by Non-Visitors

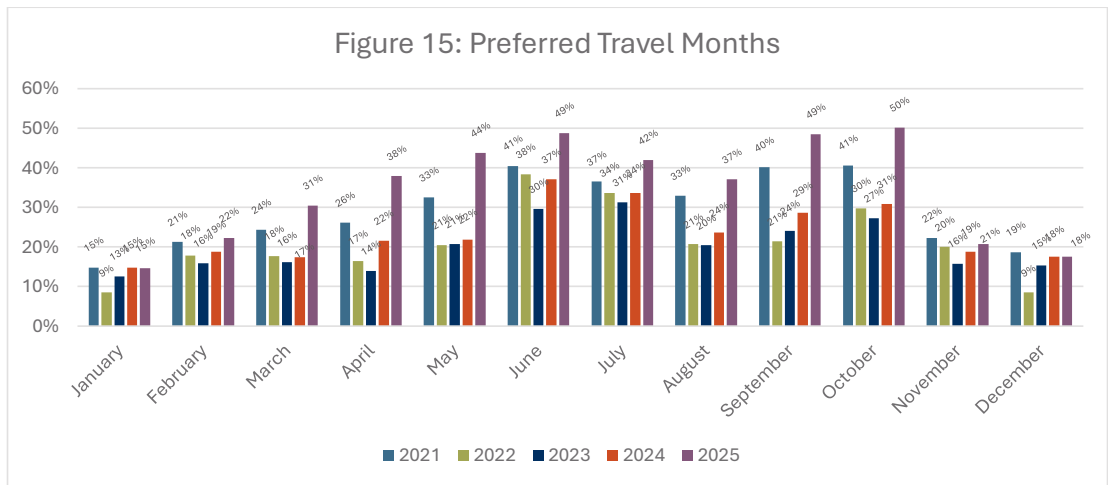
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2021	2022	2023	2024	2025
0 to 1	15.3%	10.0%	7.3%	11.7%	10.1%
2 to 4	55.1%	47.3%	50.6%	57.8%	59.4%
5 to 7	19.2%	29.9%	23.4%	18.8%	19.6%
8 to 10	6.3%	8.2%	15.8%	8.7%	5.9%
More than 10	4.1%	4.7%	2.9%	3.0%	5.1%
N	1,042	984	1,625	1,025	1,521

Table 41: Frequency of Leisure/Vacation Trips

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



	2021	2022	2023	2024	2025
January	14.8%	8.5%	12.6%	14.8%	14.7%
February	21.3%	17.8%	15.9%	18.8%	22.2%
March	24.4%	17.7%	16.1%	17.4%	30.5%
April	26.2%	16.5%	13.9%	21.6%	37.9%
May	32.5%	20.5%	20.8%	21.9%	43.8%
June	40.5%	38.4%	29.6%	37.1%	48.8%
July	36.5%	33.7%	31.3%	33.7%	41.9%
August	32.9%	20.7%	20.4%	23.6%	37.1%
September	40.1%	21.4%	24.1%	28.7%	48.5%
October	40.6%	29.8%	27.3%	30.8%	50.2%
November	22.2%	20.0%	15.8%	18.8%	20.8%
December	18.7%	8.5%	15.3%	17.6%	17.6%
N	1,042	984	1,625	1,040	1,521

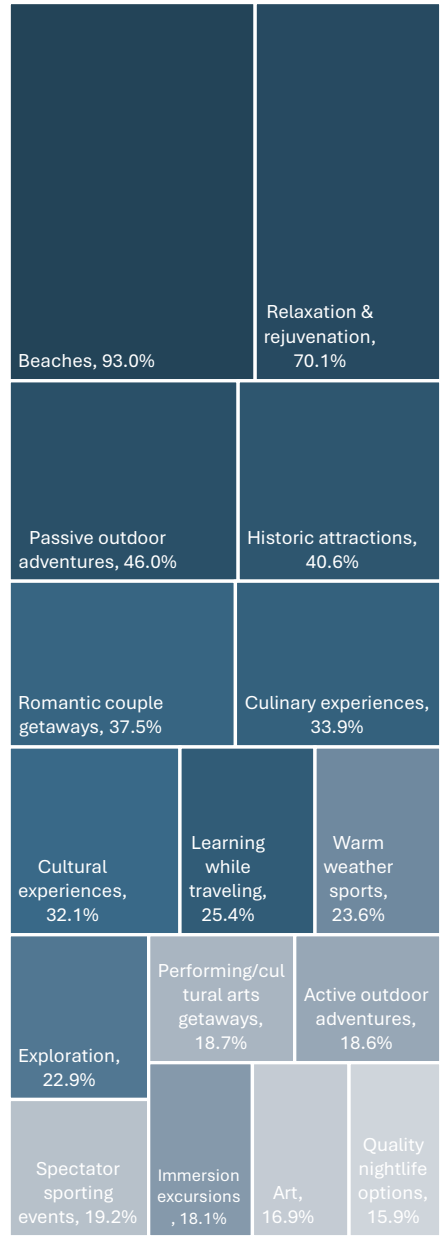
Table 42: Preferred Travel Months

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

“Appealing” + “Very Appealing”	2021	2022	2023	2024	2025
Beaches	88.4%	65.1%	71.2%	87.1%	93.0%
Relaxation & rejuvenation	85.4%	66.9%	72.2%	85.3%	70.1%
Passive outdoor adventures	72.6%	64.4%	63.7%	76.1%	46.0%
Romantic couple getaways	70.0%	65.0%	60.8%	74.7%	40.6%
Historic attractions	75.5%	64.4%	60.9%	73.6%	25.4%
Culinary experiences	70.1%	63.7%	60.3%	73.0%	33.9%
Cultural experiences	70.7%	62.9%	57.5%	72.1%	37.5%
Quality nightlife options	52.6%	60.3%	52.2%	66.7%	32.1%
Learning while traveling	60.9%	56.3%	54.1%	66.2%	22.9%
Immersion excursions	49.6%	57.4%	51.1%	66.1%	23.6%
Active outdoor adventures	46.8%	59.6%	51.9%	64.8%	18.1%
Exploration	57.5%	59.8%	54.1%	63.7%	18.6%
Art	49.8%	57.1%	49.2%	63.1%	18.7%
Theme parks	44.7%	58.7%	51.7%	63.1%	19.2%
Warm weather sports	52.7%	61.2%	53.5%	62.9%	16.9%
Water sports	48.8%	60.4%	51.1%	62.1%	15.9%
Performing/cultural arts getaways	51.2%	58.6%	50.5%	61.0%	15.4%
Luxury camping	39.9%	55.0%	50.7%	60.6%	14.9%
Urban getaway	48.4%	58.5%	48.0%	60.2%	12.8%
Spectator sporting events	49.2%	57.0%	51.5%	59.7%	13.9%
Waterparks	40.3%	54.4%	47.9%	58.4%	12.1%
Medical/wellness	40.8%	55.5%	47.9%	56.1%	8.4%
Golf getaways	37.4%	50.6%	41.9%	52.3%	10.9%
Winter sports	30.2%	53.9%	42.5%	51.7%	7.2%
Voluntourism	29.5%	49.9%	40.8%	47.6%	6.4%
Tennis getaways	25.8%	48.5%	36.2%	47.0%	5.9%
N	949	1,005	1,62	967	1,539

Table 43: 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	2024	2025
Natural beauty of the destination	88.4%	72.1%	76.9%	92.8%	90.7%
Ease of access	85.4%	70.5%	73.3%	85.5%	89.3%
Quality of lodging options	52.7%	71.0%	72.6%	84.9%	88.1%
Affordability	75.5%	67.2%	73.0%	80.6%	86.9%
Quality of dining options	44.7%	72.5%	74.6%	85.8%	86.7%
Diversity of dining options	70.0%	68.6%	70.4%	83.2%	78.9%
Travel distance	70.7%	63.1%	63.3%	71.1%	68.8%
Diversity of lodging options	25.8%	67.3%	65.9%	77.8%	64.5%
Low traffic congestion	60.9%	64.8%	63.6%	74.7%	63.9%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%	66.9%	54.1%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%	69.9%	49.4%
Activities like events/festivals	49.6%	64.2%	55.4%	66.0%	48.0%
Medical/wellness	37.4%	60.4%	52.6%	60.1%	35.7%
Nightlife activity options	48.4%	61.4%	53.2%	65.7%	28.2%
Public transportation	57.5%	57.0%	49.2%	57.9%	23.2%
Total	949	1,005	1,625	967	1,526

Table 44: Preferred Attributes for Vacations/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.	2.0%	4.9%	26.8%	35.3%	25.8%
I try to support the local economy of places that I visit.	32.4%	49.9%	7.2%	1.1%	4.1%
N	1,526				

Table 45: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent	MSA	Count	Percent
New York-Newark-Jersey City, NY-NJ	71	4.6%	Hartford-West Hartford-East Hartford, CT	7	0.5%
Chicago-Naperville-Elgin, IL-IN	57	3.7%	Jacksonville, FL	7	0.5%
Atlanta-Sandy Springs-Roswell, GA	44	2.9%	Nashville-Davidson--Murfreesboro--Franklin, TN	7	0.5%
Charlotte-Concord-Gastonia, NC-SC	40	2.6%	Orlando-Kissimmee-Sanford, FL	7	0.5%
Cincinnati, OH-KY-IN	40	2.6%	Savannah, GA	7	0.5%
Rural OH	39	2.5%	Athens-Clarke County, GA	6	0.4%
Pittsburgh, PA	37	2.4%	Austin-Round Rock-San Marcos, TX	6	0.4%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	35	2.3%	Birmingham, AL	6	0.4%
Columbus, OH	34	2.2%	Charleston-North Charleston, SC	6	0.4%
Minneapolis-St. Paul-Bloomington, MN-WI	31	2.0%	Des Moines-West Des Moines, IA	6	0.4%
Akron, OH	30	1.9%	Johnson City, TN	6	0.4%
Hilton Head Island-Bluffton-Port Royal, SC	29	1.9%	Lexington-Fayette, KY	6	0.4%
Boston-Cambridge-Newton, MA-NH	26	1.7%	Omaha, NE-IA	6	0.4%
Dallas-Fort Worth-Arlington, TX	24	1.6%	Port St. Lucie, FL	6	0.4%
Greenville-Anderson-Greer, SC	23	1.5%	Worcester, MA	6	0.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	22	1.4%	Appleton, WI	5	0.3%
Indianapolis-Carmel-Greenwood, IN	20	1.3%	Bridgeport-Stamford-Danbury, CT	5	0.3%
Louisville/Jefferson County, KY-IN	20	1.3%	Dayton-Kettering-Beavercreek, OH	5	0.3%
Toledo, OH	19	1.2%	Fort Wayne, IN	5	0.3%
Myrtle Beach-Conway-North Myrtle Beach, SC	18	1.2%	Greensboro-High Point, NC	5	0.3%
St. Louis, MO-IL	18	1.2%	Madison, WI	5	0.3%
Augusta-Richmond County, GA-SC	17	1.1%	Peoria, IL	5	0.3%
Columbia, SC	16	1.0%	Rural AL	5	0.3%
Grand Rapids-Wyoming-Kentwood, MI	16	1.0%	San Francisco-Oakland-Fremont, CA	5	0.3%
Asheville, NC	15	1.0%	Springfield, IL	5	0.3%
Detroit-Warren-Dearborn, MI	14	0.9%	Winston-Salem, NC	5	0.3%
Milwaukee-Waukesha, WI	14	0.9%	Allentown-Bethlehem-Easton, PA-NJ	4	0.3%
Baltimore-Columbia-Towson, MD	13	0.8%	Ann Arbor, MI	4	0.3%
Buffalo-Cheektowaga, NY	13	0.8%	Atlantic City-Hammonton, NJ	4	0.3%
Rochester, NY	13	0.8%	Barnstable Town, MA	4	0.3%
Durham-Chapel Hill, NC	12	0.8%	Binghamton, NY	4	0.3%
Los Angeles-Long Beach-Anaheim, CA	12	0.8%	Blacksburg-Christiansburg-Radford, VA	4	0.3%
Phoenix-Mesa-Chandler, AZ	12	0.8%	Bloomington, IL	4	0.3%
Richmond, VA	12	0.8%	Burlington-South Burlington, VT	4	0.3%
Kansas City, MO-KS	11	0.7%	Canton-Massillon, OH	4	0.3%
Miami-Fort Lauderdale-West Palm Beach, FL	11	0.7%	Harrisonburg, VA	4	0.3%
Virginia Beach-Chesapeake-Norfolk, VA-NC	11	0.7%	Lafayette-West Lafayette, IN	4	0.3%
Kingsport-Bristol, TN-VA	10	0.6%	Lancaster, PA	4	0.3%
Raleigh-Cary, NC	10	0.6%	Lynchburg, VA	4	0.3%
Wilmington, NC	10	0.6%	North Wilkesboro, NC	4	0.3%
Albany-Schenectady-Troy, NY	9	0.6%	Norwich-New London-Willimantic, CT	4	0.3%
Knoxville, TN	9	0.6%	Palm Bay-Melbourne-Titusville, FL	4	0.3%
Denver-Aurora-Centennial, CO	8	0.5%	Portland-Vancouver-Hillsboro, OR-WA	4	0.3%
Harrisburg-Carlisle, PA	8	0.5%	Rural GA	4	0.3%
Houston-Pasadena-The Woodlands, TX	8	0.5%	Rural MI	4	0.3%
Providence-Warwick, RI-MA	8	0.5%	Rural NH	4	0.3%
Rural IA	8	0.5%	Rural NY	4	0.3%

MSA	Count	Percent	MSA	Count	Percent
Scranton--Wilkes-Barre, PA	4	0.3%	Kingston, NY	2	0.1%
Seattle-Tacoma-Bellevue, WA	4	0.3%	Las Vegas-Henderson-North Las Vegas, NV	2	0.1%
Seneca, SC	4	0.3%	Manchester-Nashua, NH	2	0.1%
Albany, GA	3	0.2%	Marshall, MN	2	0.1%
Auburn, NY	3	0.2%	Marshalltown, IA	2	0.1%
Batavia, NY	3	0.2%	Morehead City, NC	2	0.1%
Beaver Dam, WI	3	0.2%	Norwalk, OH	2	0.1%
Cape Coral-Fort Myers, FL	3	0.2%	Ogden, UT	2	0.1%
Cedar Rapids, IA	3	0.2%	Oneonta, NY	2	0.1%
Celina, OH	3	0.2%	Parkersburg-Vienna, WV	2	0.1%
Charleston, WV	3	0.2%	Portsmouth, OH	2	0.1%
Charlottesville, VA	3	0.2%	Reading, PA	2	0.1%
Chattanooga, TN-GA	3	0.2%	Richmond-Berea, KY	2	0.1%
Eau Claire, WI	3	0.2%	Rochelle, IL	2	0.1%
Evansville, IN	3	0.2%	Rochester, MN	2	0.1%
Frankfort, KY	3	0.2%	Rockingham, NC	2	0.1%
Huntington-Ashland, WV-KY-OH	3	0.2%	Rural KY	2	0.1%
Jackson, MI	3	0.2%	Rural MO	2	0.1%
Jamestown-Dunkirk, NY	3	0.2%	Rural NC	2	0.1%
Lewisburg, PA	3	0.2%	Rural PA	2	0.1%
Macon-Bibb County, GA	3	0.2%	Rural VA	2	0.1%
Monroe, MI	3	0.2%	Somerset, KY	2	0.1%
Morristown, TN	3	0.2%	Somerset, PA	2	0.1%
New Haven, CT	3	0.2%	Springfield, OH	2	0.1%
North Port-Bradenton-Sarasota, FL	3	0.2%	Statesboro, GA	2	0.1%
Ocala, FL	3	0.2%	Syracuse, NY	2	0.1%
Roanoke, VA	3	0.2%	Tampa-St. Petersburg-Clearwater, FL	2	0.1%
Rural MN	3	0.2%	Torrington, CT	2	0.1%
Salem, OH	3	0.2%	Warner Robins, GA	2	0.1%
San Antonio-New Braunfels, TX	3	0.2%	Weirton-Steubenville, WV-OH	2	0.1%
Spartanburg, SC	3	0.2%	West Plains, MO	2	0.1%
Wichita, KS	3	0.2%	York-Hanover, PA	2	0.1%
Youngstown-Warren, OH	3	0.2%	Albuquerque, NM	1	0.1%
Adrian, MI	2	0.1%	Alexandria, LA	1	0.1%
Ashland, OH	2	0.1%	Altoona, PA	1	0.1%
Auburn, IN	2	0.1%	Amarillo, TX	1	0.1%
Baton Rouge, LA	2	0.1%	Anchorage, AK	1	0.1%
Bedford, IN	2	0.1%	Astoria, OR	1	0.1%
Bismarck, ND	2	0.1%	Athens, TN	1	0.1%
Boise City, ID	2	0.1%	Bangor, ME	1	0.1%
Boulder, CO	2	0.1%	Batesville, AR	1	0.1%
Burlington, NC	2	0.1%	Beaumont-Port Arthur, TX	1	0.1%
Champaign-Urbana, IL	2	0.1%	Billings, MT	1	0.1%
Charleston-Mattoon, IL	2	0.1%	Bloomington, IN	1	0.1%
Clewiston, FL	2	0.1%	Bloomsburg-Berwick, PA	1	0.1%
Columbus, IN	2	0.1%	Brainerd, MN	1	0.1%
Decatur, IN	2	0.1%	Brookings, SD	1	0.1%
Deltona-Daytona Beach-Ormond Beach, FL	2	0.1%	Brunswick-St. Simons, GA	1	0.1%
Erie, PA	2	0.1%	Bucyrus, OH	1	0.1%
Fort Collins-Loveland, CO	2	0.1%	Cañon City, CO	1	0.1%
Fresno, CA	2	0.1%	Cape Girardeau, MO-IL	1	0.1%
Greeneville, TN	2	0.1%	Chico, CA	1	0.1%
Holland, MI	2	0.1%	Clarksburg, WV	1	0.1%
Kalamazoo-Portage, MI	2	0.1%	Cleveland, TN	1	0.1%
Keene, NH	2	0.1%	Clinton, IA	1	0.1%

MSA	Count	Percent	MSA	Count	Percent
Colorado Springs, CO	1	0.1%	Owensboro, KY	1	0.1%
Columbus, NE	1	0.1%	Oxnard-Thousand Oaks-Ventura, CA	1	0.1%
Concord, NH	1	0.1%	Paducah, KY-IL	1	0.1%
Corpus Christi, TX	1	0.1%	Pierre, SD	1	0.1%
Crawfordsville, IN	1	0.1%	Portland-South Portland, ME	1	0.1%
Cumberland, MD-WV	1	0.1%	Provo-Orem-Lehi, UT	1	0.1%
Danville, IL	1	0.1%	Racine-Mount Pleasant, WI	1	0.1%
Daphne-Fairhope-Foley, AL	1	0.1%	Reno, NV	1	0.1%
Davenport-Moline-Rock Island, IA-IL	1	0.1%	Riverside-San Bernardino-Ontario, CA	1	0.1%
Decatur, AL	1	0.1%	Rockford, IL	1	0.1%
Decatur, IL	1	0.1%	Rural CA	1	0.1%
Defiance, OH	1	0.1%	Rural CO	1	0.1%
Duluth, MN-WI	1	0.1%	Rural IL	1	0.1%
Durant, OK	1	0.1%	Rural MD	1	0.1%
Elkhart-Goshen, IN	1	0.1%	Rural NE	1	0.1%
Eureka-Arcata, CA	1	0.1%	Rural WI	1	0.1%
Faribault-Northfield, MN	1	0.1%	Sacramento-Roseville-Folsom, CA	1	0.1%
Fayetteville-Springdale-Rogers, AR	1	0.1%	Salisbury, MD	1	0.1%
Findlay, OH	1	0.1%	San Angelo, TX	1	0.1%
Florence, SC	1	0.1%	San Diego-Chula Vista-Carlsbad, CA	1	0.1%
Fond du Lac, WI	1	0.1%	San Jose-Sunnyvale-Santa Clara, CA	1	0.1%
Fremont, OH	1	0.1%	Sandusky, OH	1	0.1%
Gaffney, SC	1	0.1%	Sault Ste. Marie, MI	1	0.1%
Gainesville, FL	1	0.1%	Sevierville, TN	1	0.1%
Gainesville, GA	1	0.1%	Sidney, OH	1	0.1%
Grand Junction, CO	1	0.1%	Spokane-Spokane Valley, WA	1	0.1%
Green Bay, WI	1	0.1%	Stevens Point-Plover, WI	1	0.1%
Hickory-Lenoir-Morganton, NC	1	0.1%	Sumter, SC	1	0.1%
Hilo-Kailua, HI	1	0.1%	Talladega-Sylacauga, AL	1	0.1%
Huntsville, AL	1	0.1%	Texarkana, TX-AR	1	0.1%
Jackson, MS	1	0.1%	Tupelo, MS	1	0.1%
Jefferson City, MO	1	0.1%	Vallejo, CA	1	0.1%
Jefferson, GA	1	0.1%	Victoria, TX	1	0.1%
Killeen-Temple, TX	1	0.1%	Waterloo-Cedar Falls, IA	1	0.1%
Lakeland-Winter Haven, FL	1	0.1%	Wooster, OH	1	0.1%
Lawrence, KS	1	0.1%			
Lawrenceburg, TN	1	0.1%			
Lewisburg, TN	1	0.1%			
Lima, OH	1	0.1%			
Logan, UT-ID	1	0.1%			
Longview, TX	1	0.1%			
Meadville, PA	1	0.1%			
Memphis, TN-MS-AR	1	0.1%			
Michigan City-La Porte, IN	1	0.1%			
Milledgeville, GA	1	0.1%			
Mobile, AL	1	0.1%			
Monroe, LA	1	0.1%			
Montgomery, AL	1	0.1%			
Muncie, IN	1	0.1%			
Natchitoches, LA	1	0.1%			
Newport, TN	1	0.1%			
Oak Harbor, WA	1	0.1%			
Oshkosh-Neenah, WI	1	0.1%			
Ottawa, IL	1	0.1%			
Owatonna, MN	1	0.1%			



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COLLEGE OF CHARLESTON**

2025 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 2025



FEBRUARY 2026
CONDUCTED BY:
MELINDA PATIENCE
DANIEL GUTTENTAG, PH.D.



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Table of Contents

INTRODUCTION 1

METHODOLOGY 1

RESULTS..... 2

APPENDIX 5

Introduction

This study estimates the economic impact of tourism on the Town of Hilton Head Island in 2025. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and considers the direct spending by visitors, along with the positive secondary effects of those expenditures. The analysis entailed individually estimating the economic impacts associated with various tourist segments, as classified by visitors’ lodging type – villa rental, hotel, timeshare, second homeowners and their non-paying guests, and same-day visitors – and then summing them to obtain an overall total.

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

Methodology

The economic impact estimations undertaken for this analysis involved several steps and diverse data sources. Initially, visitor volume estimates for each lodging type were produced using data on lodging demand from various third-party entities (e.g., Key Data), combined with visitor behavior data collected via a Visitor Profile Survey. The estimated total number of visitors for each segment in 2025 is shown 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 for each category in 2025 is shown 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	795,108
Hotel	408,261
Timeshare	476,094
Second Homeowner	603,999
Non-Paying Guests	156,745
Day Trip	228,346
Total Visitors	2,668,553

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. 2025 Estimated Total Expenditure by Spending Category

Category	Totals
Transportation (around the destination)	\$209,991,116
Lodging	\$1,003,246,352
Food – Dining Out	\$414,879,675
Food – Groceries	\$166,713,061
Shopping	\$267,845,799
Spas	\$85,381,926
Golf	\$153,558,010
Biking	\$52,784,745
Performance/Visual Arts	\$70,256,360
Festivals	\$46,386,053
Museums/Historical Tours	\$64,694,203
Boating/Sailing/Fishing	\$127,660,591
Nature-based Activities	\$48,709,382
Dolphin Tours	\$56,343,640
Tennis	\$43,427,850
Other Expenses	\$84,576,647
Total Expenditure	\$2,896,455,409

- **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

Visitation numbers to Hilton Head Island in 2025 were slightly below the previous year. This pattern mirrors the experience of many Southeastern coastal destinations, which have seen demand gradually decline after a dramatic rise following the pandemic, when people sought out domestic destinations offering outdoor recreation opportunities. In addition, economic uncertainties and a decline in international visitation dampened travel demand throughout 2025 across much of the

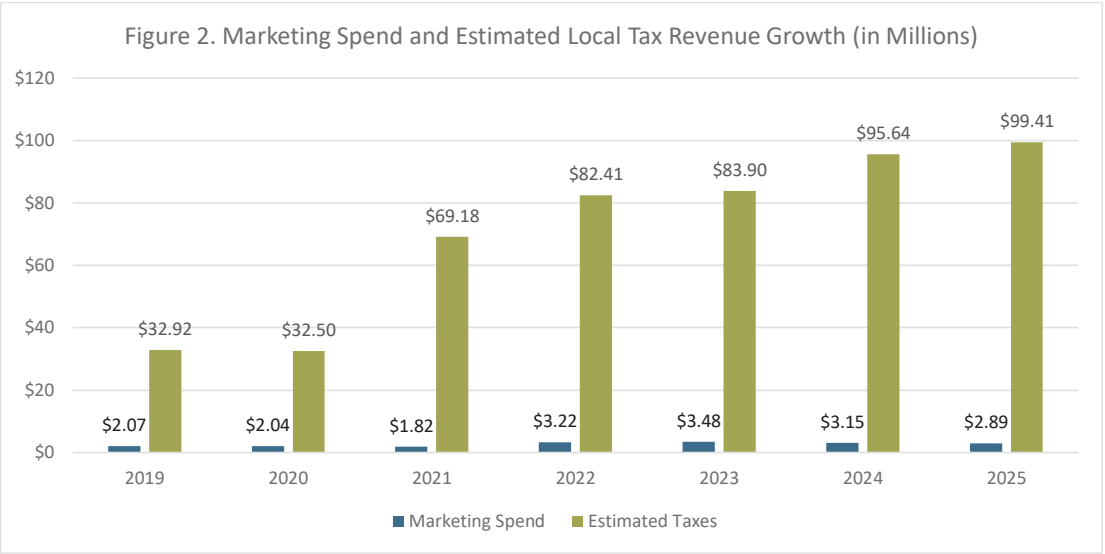
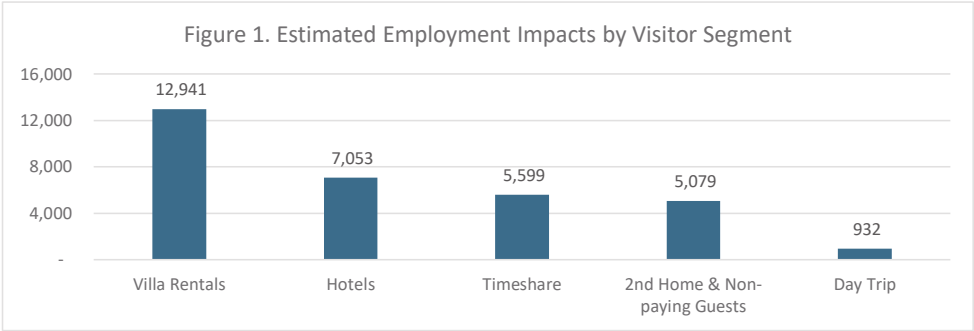
country. Nevertheless, Hilton Head Island visitor volume for 2025 was nearly identical to the pre-pandemic high that was reached in 2019. Furthermore, visitor expenditure levels increased in 2025, and consequently the total economic impact of Hilton Head Island tourism on the Beaufort County economy in 2025 exceeded that of 2024.

An estimated total of **2.67 million visitors** came to Hilton Head Island in 2025, down 5.9% compared to 2024 and down 0.6% from the pre-pandemic peak, reached in 2019. The overall economic impact of this tourism on Beaufort County was **\$3.95 billion**, up 6.2% compared to 2024. 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 **31,604 jobs**, which represent **35.4%** of all jobs in Beaufort County, as per employment data provided by the Bureau of Labor Statistics. 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 **1.37**. This signifies that every dollar spent by tourists on Hilton Head Island increased output in the overall Beaufort County economy by a total of \$1.37.

The tourist expenditures generated an estimated **\$49.58 million** in tax revenues for local Beaufort County governments. The Town of Hilton Head Island earned an additional **\$49.84 million** in accommodations tax, hospitality tax, and beach preservation fees, as reported by the Town of Hilton Head Island Revenue Services. Together, this **\$99.41 million** in tax revenue represents a Return on Tax Investment (ROTI) of 34.40, based on the \$2.89 million that was spent on destination marketing in 2025. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **\$34.40** in local tax revenue.



Appendix

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

	Employment	Labor Income	Output
Direct	9,605	\$350,616,959	\$1,171,484,315
Indirect	2,123	\$108,755,846	\$366,453,107
Induced	1,214	\$61,685,367	\$219,287,871
Total	12,941	\$521,058,172	\$1,757,225,294

Table A2. Hotel – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	5,306	\$159,076,138	\$551,229,309
Indirect	1,168	\$58,841,158	\$203,218,677
Induced	578	\$29,353,483	\$104,351,712
Total	7,053	\$247,270,780	\$858,799,698

Table A3. Timeshare – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	4,190	\$132,955,919	\$465,617,728
Indirect	931	\$47,938,835	\$160,637,121
Induced	479	\$24,322,997	\$86,467,336
Total	5,599	\$205,217,751	\$712,722,185

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

	Employment	Labor Income	Output
Direct	3,912	\$101,044,987	\$320,925,055
Indirect	793	\$39,520,883	\$138,953,280
Induced	374	\$19,000,070	\$67,547,123
Total	5,079	\$159,565,941	\$527,425,458

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

	Employment	Labor Income	Output
Direct	716	\$21,838,866	\$59,910,050
Indirect	140	\$6,807,261	\$24,309,517
Induced	76	\$3,864,687	\$13,739,239
Total	932	\$32,510,814	\$97,958,806

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

	Employment	Labor Income	Output
Direct	23,729	\$765,532,870	\$2,569,166,457
Indirect	5,155	\$261,863,984	\$893,571,702
Induced	2,721	\$138,226,603	\$491,393,282
Total	31,604	\$1,165,623,457	\$3,954,131,441
Estimated Local Tax Revenue			\$49,576,954
Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)			\$49,837,512
Total Estimated Local Tax Revenue			\$99,414,466

Table A7. Top 50 Industries Impacted by HHI Tourism

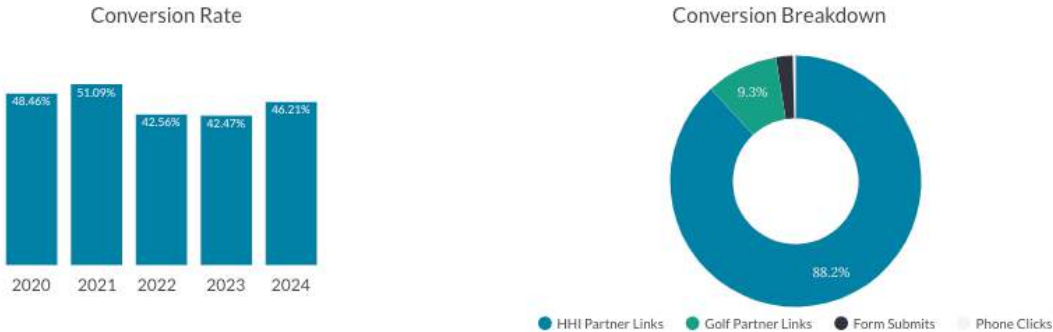
	Industry	Output
1	Non-hotel accommodations	\$822,889,518.65
2	Full-service restaurants	\$443,306,443.76
3	Fitness and recreational sports centers	\$251,435,561.60
4	Other real estate	\$232,876,295.11
5	Transit and ground passenger transportation	\$212,672,151.13
6	Hotels and motels, including casino hotels	\$181,321,631.15
7	Miscellaneous store retailers	\$148,643,562.94
8	Water transportation	\$127,914,716.19
9	Museums, historical sites, zoos, and parks	\$113,640,911.69
10	Owner-occupied housing	\$100,375,180.06
11	Truck transportation	\$97,767,253.22
12	Insurance agencies, brokerages, and related activities	\$80,202,613.00
13	Performing arts companies	\$72,910,574.30
14	Scenic and sightseeing transportation and support activities for transportation	\$68,304,589.26
15	Food and beverage stores	\$61,697,639.04
16	Other amusement and recreation industries	\$49,376,615.62
17	All other food and drinking places	\$37,810,002.38
18	Monetary authorities and depository credit intermediation	\$35,550,066.72
19	Other local government enterprises	\$31,119,623.71
20	Legal services	\$28,502,345.38
21	Maintenance and repair construction of nonresidential structures	\$27,063,775.60
22	Services to buildings	\$25,216,129.18
23	Employment services	\$24,547,143.00
24	Securities and commodity contracts intermediation and brokerage	\$22,775,503.97
25	Limited-service restaurants	\$21,813,950.10
26	Travel arrangement and reservation services	\$20,283,748.66
27	Management consulting services	\$20,036,143.43
28	Offices of physicians	\$19,873,227.34
29	Landscape and horticultural services	\$18,058,982.52
30	Advertising, public relations, and related services	\$18,003,110.31
31	Postal service	\$17,776,116.74
32	Management of companies and enterprises	\$16,851,483.91
33	Nondepository credit intermediation and related activities	\$16,657,563.63
34	Lessors of nonfinancial intangible assets	\$16,549,080.81
35	Accounting, tax preparation, bookkeeping, and payroll services	\$15,734,512.64
36	Other financial investment activities	\$15,383,027.58
37	Data processing, hosting, and related services	\$14,604,188.11
38	Automotive repair and maintenance, except car washes	\$13,258,147.40
39	Motor vehicle and parts dealers	\$12,626,802.31
40	Insurance carriers, except direct life	\$12,067,724.66
41	Commercial and industrial machinery and equipment rental and leasing	\$12,007,569.06
42	General merchandise stores	\$11,487,702.74
43	Couriers and messengers	\$11,323,509.03

	Industry	Output
44	Wholesale - Other nondurable goods merchant wholesalers	\$10,944,823.49
45	Tenant-occupied housing	\$10,818,011.66
46	Internet publishing and broadcasting and web search portals	\$10,809,468.38
47	Personal and household goods repair and maintenance	\$10,107,404.31
48	Waste management and remediation services	\$9,391,336.02
49	Gasoline stores	\$9,360,953.40
50	Electric power transmission and distribution	\$9,117,760.87

HILTON HEAD ISLAND PROPER

CONVERSION RATE OVERVIEW

- We were able to increase our conversion rate by a few points compared to 2023, up to 46%.
- The majority of conversions are outgoing links to partners (88.2%). Golf accounts for 9.3% of conversions. Form Submits and Click to Call actions drove 2.6% between the two.



HILTON HEAD ISLAND PROPER

DMAs

- In 2024 we see positive increases in many DMAs, and marginal decreases in some. Notably, traffic from Florida, New York and Texas saw really positive increases.
- While traffic remained quite consistent YOY, we were able to increase our visitation from key markets.

Top 10 Markets



HILTON HEAD ISLAND PROPER

PAGE PERFORMANCE

The homepage continues to be the top landing page on the website, followed by the See & Do page, and Co-op marketing page. The America's Favorite Escapes landing page, launched in October 2024, ranked as the 11th most visited page in 2024, contributing to both website sessions and partner referrals.

The Average Session Duration and Engagement Rate metrics indicate an interested and curious audience. Users are spending more time on site than in 2023, most notably on the homepage (+ 12 sec) and the co-op page (+ 1min 6 sec). Increasing our web visitation, as well as our core engagement metrics indicates users are deepening their knowledge of the destination.

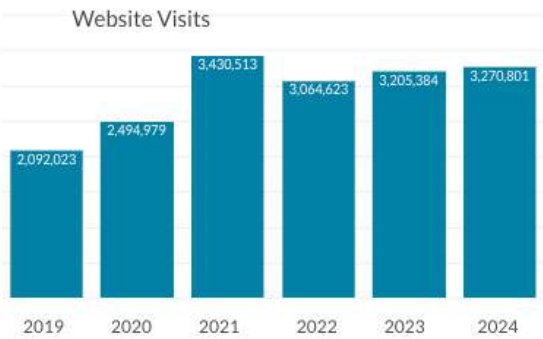
Top Pages

	Page path and screen class	Pageviews	Avg Session Duration	Engagement rate
1.	/	706,773	01:37	77.12%
2.	/see-do	367,218	01:19	61.36%
3.	/offers/hilton-head-island-escapes	315,430	02:25	81.29%
4.	/stay/hotels-inns-resorts	200,534	03:40	88.29%
5.	/events	149,577	02:26	79.03%
6.	/dining	100,012	00:28	28.8%
7.	/golf/golf-getaway	96,153	01:30	78.29%
8.	/hilton-head-island-airport	89,978	01:20	77.5%
9.	/stay/vacation-homes-villas	82,044	03:50	89.64%
10.	/chamber-restaurant-week	80,972	06:21	88.24%
11.	/americas-favorite-escapes	79,228	01:55	71.43%
12.	/offers	77,047	01:30	80.56%

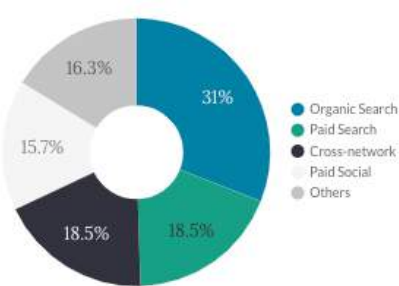
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TOTAL WEBSITE VISITATION

- In 2024, there were 3.27M visits to the hiltonheadisland.org website. Search traffic (organic and paid) contributed the majority of traffic to the website (65.2%). Traffic to the website increased by +2.7% vs. PY.
- 73.7% of users navigated to the site from a mobile device, followed by 20.3% on a desktop and 5.9% from a tablet.

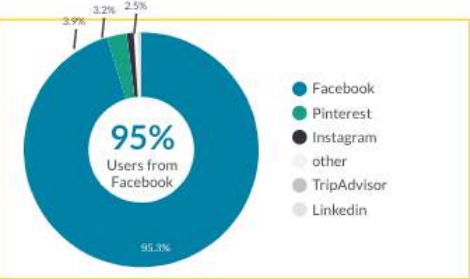


Visitors by Channel



HILTON HEAD ISLAND

ORGANIC SOCIAL TRAFFIC



- Facebook is the key driver for the majority of the social traffic to the website, accounting for 95% of the organic social sessions.
- Users are more likely to convert on Facebook than other organic platforms. On platforms like Instagram and Pinterest, we are able to share high quality content to deeper the connection followers have with the destination, while converting users from Facebook.

Social Traffic Engagement

	Social Network	Sessions	% Sessions of Total	Pages / Session	Avg. Session Duration
1.	Facebook	129,325	96%	15.38	19:13
2.	Pinterest	3,691	3%	21.64	11:20
3.	Instagram	1,307	1%	5.08	03:13
4.	other	877	1%	39.27	02:30
5.	TripAdvisor	371	0%	18.52	07:53
6.	Linkedin	149	0%	1.95	11:14



Sea Turtle Nest in Hilton Head Dedicated to Craig Melvin's Family

June 26, 2025

A sea turtle nest in Hilton Head, South Carolina, has been dedicated to Craig Melvin's family. A mama loggerhead just laid 138 eggs in the Sea Pines area and the eggs should hatch in about two months!

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Exchange Vows at These 12 Country Club Wedding Venues Across the United States

And the best part is, you don't have to be members.

Country Club of Hilton Head in Hilton Head, South Carolina



Indianapolis MONTHLY

Traveler: Hilton Head Island



HILTON HEAD ISLAND is South Carolina's Lowcountry's best-kept secret. Think relaxed coastal ambience, job grocery, antique shops, state-of-the-art trees blanketed in Spanish moss, and 12 miles of pristine Atlantic beaches.

The Gulf Stream-warmed waters are an indulgent delight even if you only make it to your knees. The beaches are wide enough to cruise bikes on the shoreline at low tide. You can sit out on a bright-to-waiting cruise or a guided kayak adventure.

Take up your fishing duties and explore the sweeping marshes and secluded coves of the Pritchard Island National Wildlife Refuge. Keep your eyes peeled for sea turtles skittering in the underbrush and migratory birds including the roseate spoonbills along with American alligators sunbathing on the sand. Another worthy look is at the Audubon Newhall Preserve. The a mile morning jaunt around a pond is led by dedicated volunteers.

Hilton Head is renowned for its oysters, crab cakes, and shrimp. Hilton's Seaside House on the beachfront, harbor, and shade its own oyster. More must-tries are the seafood gumbo, coconut shrimp with citrus Thai chili sauce, Atlantic salmon as thick as a ribeye, and hot, crispy crab poutine. It's no surprise that owner Brian Gorman reserves the island's annual seafood festival each February.

Perched, make your way to the Historic Mitchellville Freedom Park to learn about the first town self-governed by freedmen in America and vibrant Gullah community that called this part of the island home. Finally, wind down your trip by taking in the sunset from the top of the Harbor View Lighthouse Museum.

Condé Nast Traveler

23 Best Luxury Family Resorts in the US and Caribbean



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The Best Ideas for a Romantic Getaway in South Carolina

If you're looking to take a romantic getaway with Southern comfort, we have ideas for you.



TravelDreamsMagazine

Shoulder Season Vacation Ideas – Hilton Head Island, S.C.



TRAVEL+ LEISURE

15 Top Travel Destinations to Visit in February

Here are 15 of the best places to visit in February in the U.S. and around the world.

By Patricia Delaney | Updated on November 1, 2022

Hilton Head Island, South Carolina



THE EVERYGIRL

15 Coastal Grandma-Inspired Destinations That Look Straight Out of a Nancy Meyers Movie

13. Hilton Head, South Carolina



TV Insider



Craig Melvin Shares Family Vacation Photos After Week-Long 'Today' Absence

lonely planet



From Charleston to Savannah: the ultimate Lowcountry road trip

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Discover 25 of America's Best Beaches From Coast to Coast

From New York to Hawaii and California to Florida, find your perfect U.S. beach destination.

By Joanne B. Roberts | November 10, 2022

TRAVEL+ NOIRE

DOMESTIC WELLNESS DESTINATIONS TO RELAX, RELATE, AND RELEASE



HILTON HEAD, SOUTH CAROLINA: COASTAL HEALING AND SOUTHERN CHARM

TravelDreamsMagazine



No Passport, No Hassle – Your Perfect Getaway Awaits in Hilton Head Island

Reader's Digest

52 Affordable Quick Trips to Escape Without Breaking the Bank



SUSAN ASATE/GETTY IMAGES

Hilton Head, South Carolina

BOOK ON TRIPADVISOR

Why you'll love it: With everything from sun-soaked beaches to culinary hidden gems to miles and miles of golf courses on 33 different greens, Hilton Head Island offers the perfect backdrop for those looking for a safe domestic beach adventure and an affordable beach vacation.

Budget tip: Bring your bicycle with you for some of the best pedaling in the country. The American League of Bicyclists named the island a Gold Level Bicycle-Friendly Community, —and summer is the perfect time for a pedal. You can even ride on the flat and leveled sand.

Where to stay: Perched on Hilton Head Island's iconic white-sand beaches and framed by swaying palmetto trees, Westin Hilton Head Island Resort & Spa offers travelers a true Lowcountry oasis. With private access to a 12-mile swath of pristine beaches and an array of outdoor resort pools and amenities, the hotel feels like a tropical island vacation, but one you can drive to.

Condé Nast Traveler

A Day at the Condé Nast Traveler Points of View Summit

Travel trends, transforming technology, and deep insights.

By DANIELA HARRIS

November 14, 2022

People

Exclusive

How Craig Melvin Turned His 'Luddite' Hobby into a Family Business Benefiting Cancer Charities (Exclusive)

The NBC comedian exclusively tells PEOPLE about his candle company Melvin Made, launching Dec. 2 for Giving Tuesday.

By Alex Ross | Published on December 1, 2023 10:00am EST

2025 Media Coverage Results

**Results represent 2025 calendar year results*

TOTAL

2,487

STORIES/MENTIONS

24,478,291,321

IMPRESSIONS

\$31,719,802.95

AD VALUE

HILTON HEAD ISLAND

2025 DMO Metrics Report



2025 Destination Marketing Organization Industry Metrics

Annual Report

HILTON HEAD
ISLAND
SOUTH CAROLINA

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

The metrics presented in this document are aligned with the framework established under the previous DMO contract, which remained in effect through November 2025. With the implementation of the updated contract in December 2025, certain performance measures and reporting expectations have been refined to reflect evolving strategic priorities and industry standards. As such, there may be differences between the metrics included in this report and those outlined in the FY 2026-2027 Hilton Head Island Destination Marketing Plan. Metrics aligned with the updated contract will be fully incorporated beginning with the 2026 metrics report.

All reports referenced in this document, along with related materials such as marketing plans, economic impact studies, visitor profile studies, and independent audits, are available through THINK: Transparency in Tourism Marketing at thinkhiltonheadisland.org. This platform serves as a central hub where the public can access both current and past information related to Hilton Head Island’s tourism marketing efforts.

Table of Contents

Reports such as:

(i) visitor and satisfaction surveys	4
(ii) revenue per available room	5
(iii) occupancy rates	5
(iv) visitor spending studies	11
(v) return on investment for visitor spending per dollar of investment	12
(vi) local tax revenues generated by visitors	13
(vii) number of visitors	14
(viii) number of referrals made to area businesses and number of website hits and click-throughs made to area businesses	15
(ix) numbers related to mail fulfillment and other contacts.....	16
(x) industry awards received for marketing and public relations efforts	17
(xi) number of jobs created by tourism	20
(xii) events held and participation in events by Chamber members	21
(xiii) update on its public relations efforts to include the number of media impressions and the dollar equivalent for the media impressions	25

Appendix

2025 Hilton Head Island Visitor Profile Survey: Office of Tourism Analysis, College of Charleston	32
2025 Community Sentiment Survey: MMGY Travel Intelligence.....	75
2025 Hilton Head Island Economic Impact Report: College of Charleston.....	90

Visitor and Resident Satisfaction Surveys Executive Summary

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

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

- Visitor Profile Study Executive Summary, Office of Tourism Analysis, College of Charleston
- Community Sentiment Survey Executive Summary, MMGY Travel Intelligence
- Estimated Total Impact of Tourism in Hilton Head Island, College of Charleston



Revenue Per Available Room, Occupancy Rates & Average Daily Rate

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

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

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

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

RevPar	ROOM REVENUE ROOMS AVAILABLE
OCC	ROOMS SOLD ROOMS AVAILABLE
ADR	ROOM REVENUE ROOMS SOLD

Details on the next page provide 2025 performance metrics for Hilton Head Island in a two-source combined calculation that includes both home & villa and hotels as well as broken out separately for comparison. There are also additional metrics for the hotel industry that show Hilton Head Island compared against the U.S. as a whole and top competitors, Charleston and Savannah.

Home & villa numbers are based on a sample of 4,353 units/keys and could vary, as an example from a one-bedroom villa to a ten-bedroom house. The hotel numbers are based on a sample of 2,008 hotel rooms at 11 properties on the Island.

2025 Hilton Head Island Lodging Performance

	2-SOURCE (Combined Home & Villa and Hotel Report)	HOME & VILLA	HOTELS
RevPAR	\$161.00 -4.0%	\$183.00 0% FLAT	\$125.00 -12.0%
OCC	49.0% -7.0%	49.0% -4.0%	50.0% -13.0%
ADR	\$328.00 +4.0%	\$377.00 +4.0%	\$249.00 +1.0%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPar down -0.3%
- Occupancy down -1.2%
- ADR up 0.9%

Competitor Set

Charleston

- RevPar down -3.0%
- Occupancy down -3.0%
- ADR flat 0%

Savannah

- RevPar down -7.0%
- Occupancy down -4.0%
- ADR down -3.0%

Source: 2025 Keydata
Note: Data reflects a point-in-time snapshot. YoY % changes are based on adjusted prior-year data and may not exactly match prior-year snapshot values.

2024 Hilton Head Island Lodging Performance

	2-SOURCE (Combined Home & Villa and Hotel Report)	HOME & VILLA	HOTELS
RevPAR	\$173.00 -3.0%	\$194.00 -2.0%	\$143.00 -4.0%
OCC	55.0% -4.0%	53.0% -5.0%	58.0% -3.0%
ADR	\$313.00 +1.0%	\$364.00 +3.0%	\$248.00 -1.0%

HOTEL INDUSTRY COMPARISON

<u>Nationwide</u>	<u>Competitor Set</u>	
• RevPar up +1.0% • Occupancy up +0% • ADR up +1.0%	<u>Charleston</u> • RevPar up +0% • Occupancy up +1.0% • ADR down -1.0%	<u>Savannah</u> • RevPar up +1.0% • Occupancy up +3.0% • ADR down -1.0%

Source: 2024 Keydata
Note: Keydata adjusts reports annually, which can result in reporting variances.

2023 Hilton Head Island Lodging Performance

	2-SOURCE (Combined Home & Villa and Hotel Report)	HOME & VILLA	HOTELS
RevPAR	\$177.00 +1.1%	\$221.00 -7.0%	\$146.00 -3.0%
OCC	59.0% -2.0%	59.0% -2.3%	59.0% -2.2%
ADR	\$299.00 +2.4%	\$375.00 +18.3%	\$245.00 -2.0%

HOTEL INDUSTRY COMPARISON

<u>Nationwide</u>	<u>Competitor Set</u>	
• RevPar up +4.9% • Occupancy up +0.6% • ADR up +4.3%	<u>Charleston</u> • RevPar up +2.6% • Occupancy up +0.8% • ADR up +1.8%	<u>Savannah</u> • RevPar up +1.7% • Occupancy up +1.1% • ADR up +0.6%

Source: 2023 Keydata and 2023 Smith Travel Research
Note: The Smith Travel Research and Keydata platforms adjust reports annually, which can result in reporting variances.

2022 Hilton Head Island Lodging Performance

	2-SOURCE (combined Home & Villa and Hotels Report)	HOME & VILLA	HOTELS
RevPAR	\$175.00 +8.0%	\$221.00 +18%	\$147.00 +1.0%
OCC	54.0% 0% FLAT	45.0% +4.0%	60.0% -2.0%
ADR	\$323.00 +8.0%	\$496.00 +13%	\$247.00 +3.0%

HOTEL INDUSTRY COMPARISON

<u>Nationwide</u>	<u>Competitor Set</u>	
• RevPAR up +29.8%	Charleston	Savannah
• Occupancy up +8.9%	• RevPAR up +19.4 %	• RevPAR up +24.2%
• ADR up +19.1%	• Occupancy up +6.1%	• Occupancy up +7.7%
	• ADR up +12.5%	• ADR up +15.4 %

Source: 2022 Keydata and 2022 Smith Travel Research
Note: The Smith Travel Research and Keydata platforms adjust reports annually, which can result in reporting variances.

2021 Hilton Head Island Lodging Performance

	2-SOURCE (Combined Home & Villa and Hotels Report)	HOME & VILLA	HOTELS
RevPAR	\$175.00 +44.9%	\$191.00 +36.2%	\$150.00 +81.9%
OCC	59.9% +26.9%	60.4% +26.2%	60.3% +29.9%
ADR	\$292.00 +14.2%	\$317.00 +8.0%	\$249.00 +40.1%

HOTEL INDUSTRY COMPARISON

<u>Nationwide</u>	<u>Competitor Set</u>	
• RevPAR up +58.1%	Charleston	Savannah
• Occupancy up +31%	• RevPAR up +92.2%	• RevPAR up +77.2%
• ADR up +20.7%	• Occupancy up +39.1%	• Occupancy up +35.0%
	• ADR up +38.2%	• ADR up +31.2%

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

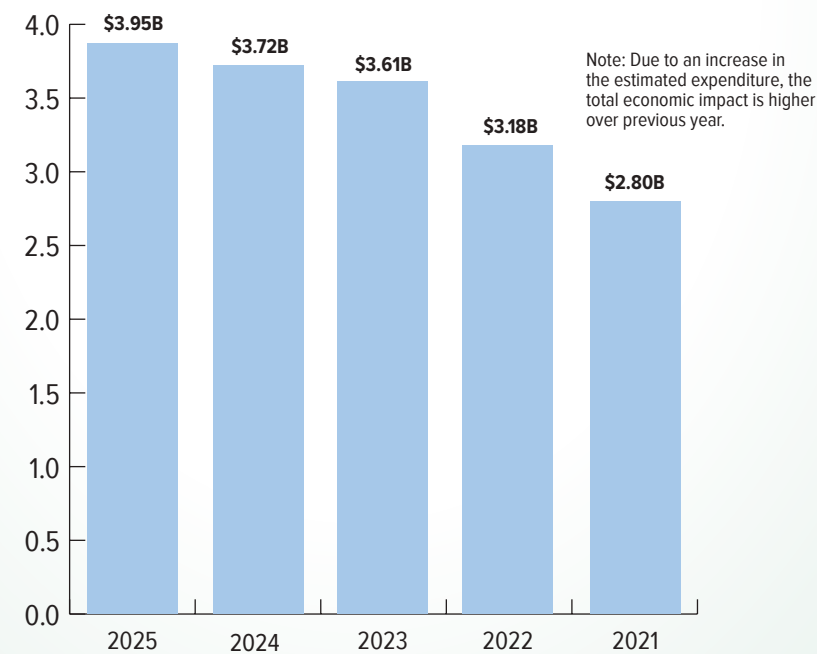
Visitor Spending Studies

This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2025 was performed by the College of Charleston Office of Tourism Analysis.

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



\$3.95 BILLION
ECONOMIC IMPACT OF
HILTON HEAD ISLAND TOURISM IN 2025



Source: Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2025.

ROI for Visitor Spending Per Dollar of Investment

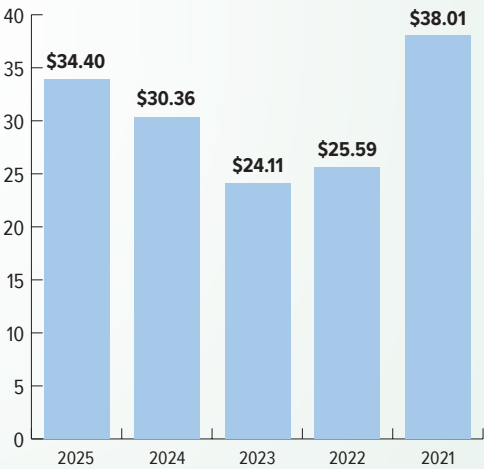
The Visitor & Convention Bureau is the destination marketing division of the Hilton Head Island & Bluffton Chamber of Commerce. This division works to increase tourism through its marketing efforts cultivating leisure as well as meetings and group business for Southern Beaufort County.

The marketing efforts put forth by the Visitor & Convention Bureau are delivered consistently to a well-defined target consumer set that aligns with our visitor research. Hilton Head Island experienced a slight decrease in visitation by 5.9% compared to 2024.

FOR EVERY TAX DOLLAR INVESTED IN MARKETING



=
\$34.40



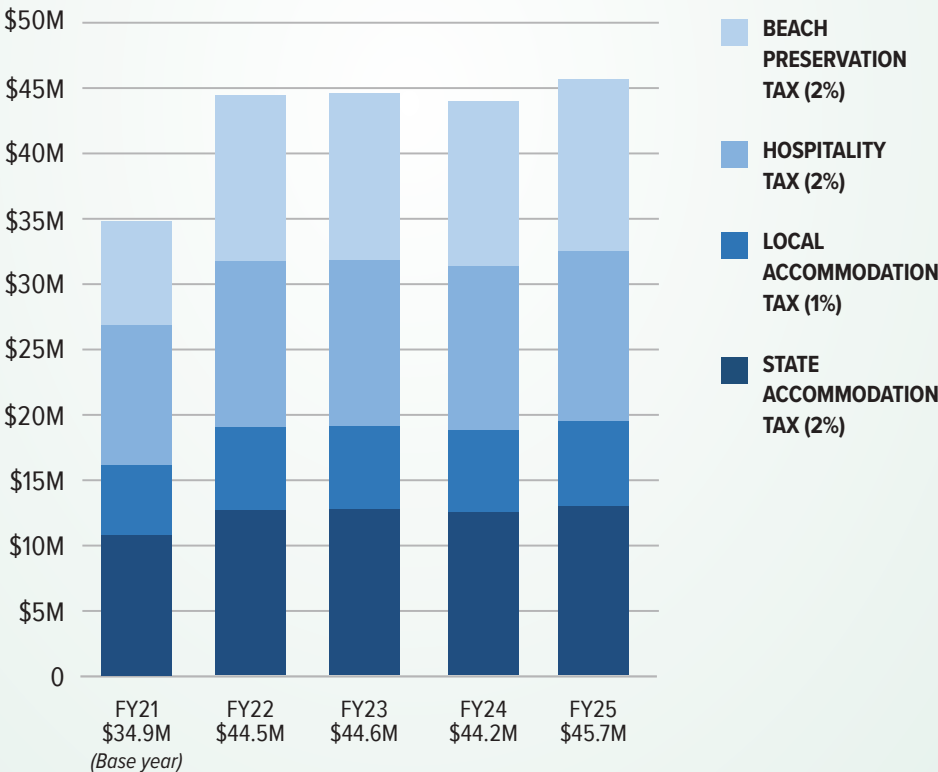
Source: Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2025

Local Tax Revenues Generated by Visitor

↑31%

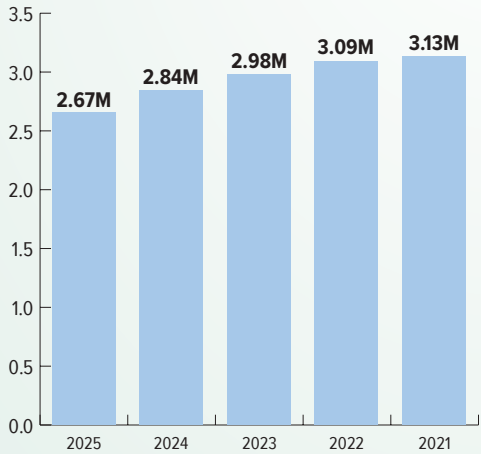
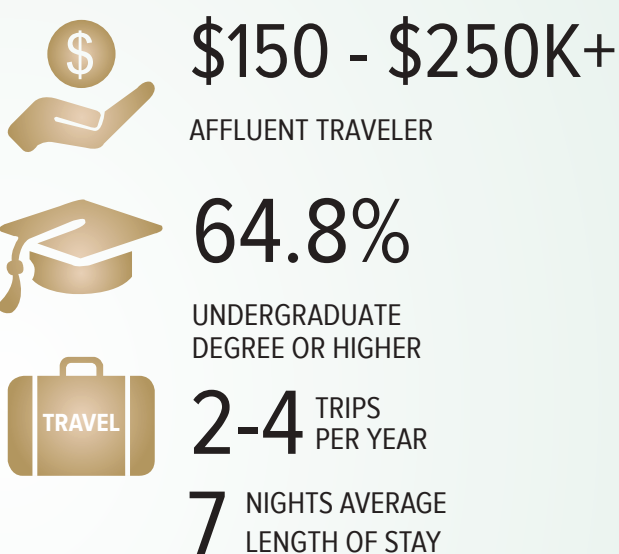
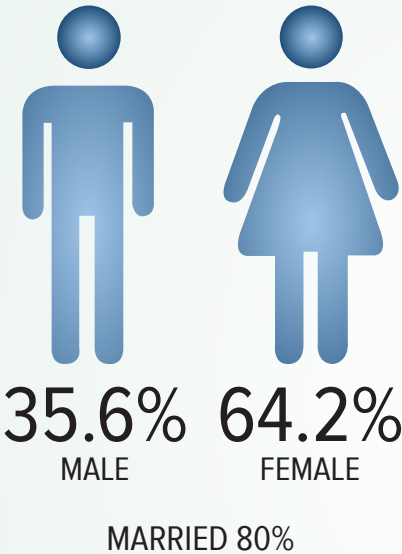
ACCOMMODATION & HOSPITALITY TAX UP OVER 5 YEARS
Source: Town of Hilton Head Island

TOWN OF HHI ATAX and HTAX COLLECTIONS



Number of Visitors

Based upon research gathered both locally and nationally, the Visitor & Convention Bureau is committed to attracting an affluent traveler with a household income of \$150K-\$250K+. Our target visitor skews Female (64%) and aged 45-55. This traveler has an undergraduate degree or higher (65%) and plans to take 2 to 4 trips per year lasting an average of 6 nights per trip. Our target key regions include the Northeast, Midwest, and Southeast markets.

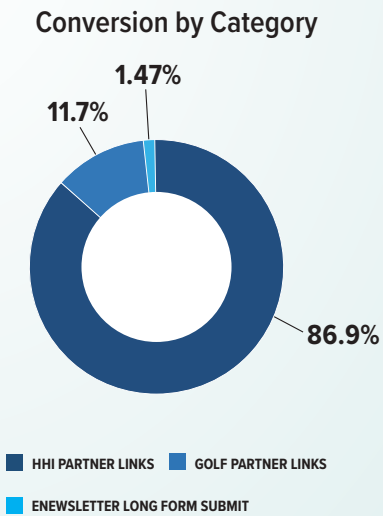
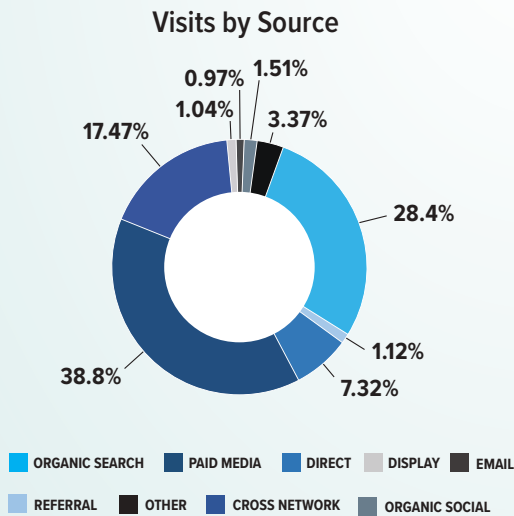
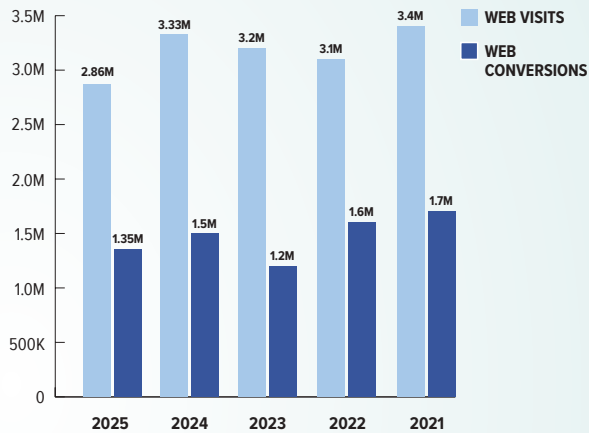
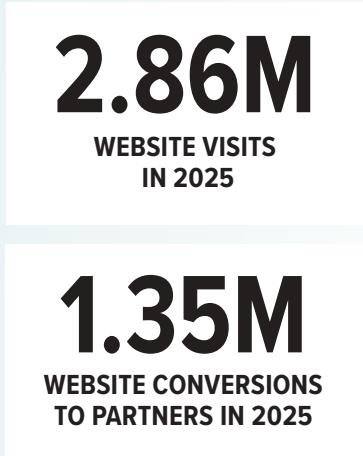


2.67M
NUMBER OF VISITORS IN 2025

Sources: 2025 Visitor Profile Study/Keydata/Smith Travel Research Inc./College of Charleston

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

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



Source: Google Analytics & VERB Interactive

Numbers Related to Mail Fulfillment

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

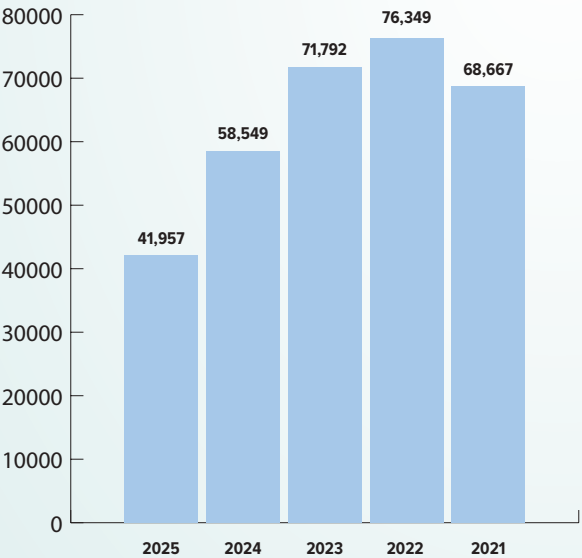
We receive requests for this piece from multiple platforms; online, media, and home inquiries. In addition, we also distribute the planner to state and local welcome centers, and airports, along with tradeshow and promotional events.



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

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

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



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

Spotlight on Accolades

America’s Favorite Island®



Condé Nast Traveler Hilton Head Island among the Best Beaches in the United States	Condé Nast Traveler 11 Coastal Hotels in the US for a Sunny Spring Break
Travel + Leisure “Hilton Head Island one of the Best Beach Towns to Live in Year-Round”	Travel + Leisure 12 Best Beach Towns on the East Coast
Travel & Leisure 16 Best Spa Weekend Getaways in the U.S.	Travel & Leisure 11 Best Places to Live in South Carolina
Travel & Leisure Travel + Leisure Readers’ 15 Favorite Islands in the Continental U.S. of 2025	Travel & Leisure 10 Best Vacation Destinations for Seniors

Spotlight on Accolades

America’s Favorite Island®

Southern Living “Hilton Head Beach has the Bluest Water in S.C.”	Southern Living The 50 Best Beach Towns In The South 2025
Southern Living The 8 Most Beautiful Places On The South Carolina Coast	Tripadvisor Top 10 of Tripadvisor’s Top Trending Destinations in the US
Women's Health 2025 Health Travel Awards Best Wellness Program Hilton Head Health & Wellness Resort & Spa	MSN Travel 20 Best Islands to Visit Without Leaving the U.S.
Golf Digest America’s 100 Greatest Golf Courses	Travel Noire Domestic Wellness Destinations To Relax, Relate, And Release

Spotlight on Accolades

America’s Favorite Island®

USA Today 10Best
Best Beach in South Carolina - Coligny Beach

USA Today 10Best
Best Beach Bar – The Beach House

USA Today 10Best
Best Resort Airport (Hilton Head Island Airport)

USA Today 10Best
Best Wellness Retreat Center

US News & World Report
12 Best Places to Visit in South Carolina

US News & World Report
2 SC Hotels are the Best in the US for 2025

Yahoo Lifestyle
These Are the Best Spa Resorts in the U.S. for a Relaxing Weekend

Number of Jobs Created by Tourism

This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2025 was performed by the College of Charleston School of Business, Office of Tourism Analysis.

The 31,604 jobs jobs that comprise the estimated total employment impact generated by the five combined visitor segments in 2025 represent 35.4% of all jobs in Beaufort County.

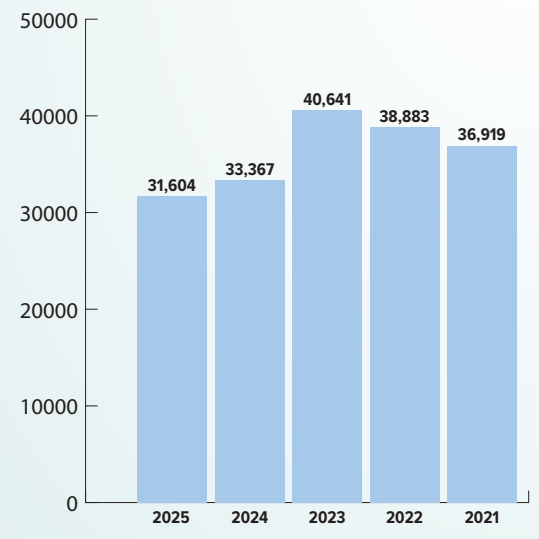
31,604
JOBS

GENERATED FROM
HILTON HEAD ISLAND TOURISM

TOURISM ON HHI
NOW ACCOUNTS FOR

35.4%

OF ALL JOBS IN
BEAUFORT COUNTY



Source: Estimated Total Impact of Tourism In Hilton head Island On Beaufort County, South Carolina 2025

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

Networking Events, Workshops and Member/Community Events

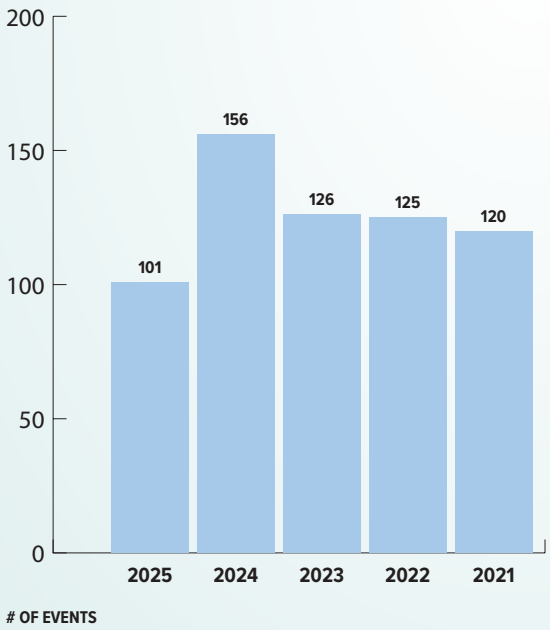
In 2025, we celebrated 58 ribbon cuttings and groundbreaking ceremonies along with 43 in-person and virtual networking, learning seminars, and meetings, reaching 6,000+ people.

58

RIBBON CUTTINGS
& GROUNDBREAKING
CEREMONIES

43

IN PERSON + VIRTUAL
CHAMBER EVENTS



thinkhiltonheadisland.org

2025 EVENTS

JANUARY

- 1/8/2025
Power Hour Tele Town Hall
[Virtual](#)
- 1/11/2025–01/18/2025
Chamber Wellness Week
[Hilton Head Island & Bluffton](#)
- 1/15/2025
First Presbyterian Day School Playground
Ribbon Cutting
[Hilton Head Island](#)
- 1/16/2025
Novant Health PT Solutions
Ribbon Cutting
[Hilton Head Island](#)
- 1/25/2025–2/1/2025
Chamber Restaurant Week
[Hilton Head Island & Bluffton](#)
- 1/30/2025
Conversation + Cocktails: Kung Fu Cantina
[Bluffton](#)
- Lennie & Remi Ribbon Cutting
[Bluffton](#)

FEBRUARY

- 2/4/2025
Power Hour Tele Town Hall
[Virtual](#)
- 2/3/2025
Ribbon Cutting at the Town of Bluffton
Squire Pope Carriage House
[Bluffton](#)

2025 DMO Industry Metrics Annual Report 21

- 2/18/2025
Biscuits & Benefits
[Hilton Head Island](#)
- 2/19/2025
Chamber Young Professionals -
Hawaii Fluid Art
[Hilton Head Island](#)
- 2/20/2025
Sparklight Ribbon Cutting
[Bluffton](#)
- 2/27/2025
Ribbon Cutting at Local Legend
Brewing Company
[Hilton Head Island](#)
- Conversation + Cocktails: Local
Legend Brewing Company
[Hilton Head Island](#)

MARCH

- 3/4/2025
Beautique Medical Aesthetics
Ribbon Cutting
[Bluffton](#)
- 3/5/2025
Power Hour Tele Town Hall
[Virtual](#)
- 3/7/2025
TCL Culinary Institute of the
South Foodseum Ribbon
Cutting
[Bluffton](#)
- 3/15/2025
Chamber Ball
[Hilton Head Island](#)
- 3/16/2025
Caring Transitions of Hilton
Head Ribbon Cutting
[Beaufort County](#)
- 3/19/2025
Hilton Head Christian Academy
Upper School Ribbon Cutting
[Bluffton](#)
- Chamber Young Professionals
at Uncorked
[Hilton Head Island](#)

thinkhiltonheadisland.org

- 3/20/2024
Conversation + Cocktails:
Nectar in Bluffton
[Bluffton](#)
- 3/25/2025
Collins Group Realty Ribbon
Cutting
[Bluffton](#)
- Leadership Alumni Speaker
Series Event
[Hilton Head Island](#)
- 3/22/2024
Ribbon Cutting: Eyemazy
Iris Photography
[Hilton Head Island](#)
- 3/27/2025
Outside Palmetto Bluff Ribbon
Cutting
[Bluffton](#)

APRIL

- 4/2/2024
Power Hour Tele Town Hall
[Virtual](#)
- Novant Health Groundbreaking
Ceremony for Bluffton
Emergency Department
[Bluffton](#)
- Pregnancy Center &
Clinic Ribbon Cutting and
Anniversary
[Hilton Head Island](#)
- 4/3/2024
Paid Par-Tee
[Hilton Head Island](#)
- 4/22/2025
Pure Salt Studios Ribbon
Cutting
[Hilton Head Island](#)
- 4/23/2025
Daniel Ravenel Sotheby's
International Realty Ribbon
Cutting
[Hilton Head Island](#)

- 4/25/2025
Venice Lash Lounge Ribbon
Cutting
[Hilton Head Island](#)
- 4/30/2025
Power Hour Tele Town Hall
[Virtual](#)

MAY

- 5/2/2025
Dill Dinkers Pickleball Ribbon
Cutting
[Hilton Head Island](#)
- Pops of Hilton Head
Anniversary Ribbon Cutting
[Hilton Head Island](#)
- 5/5/2025–5/8/2025
Small Business Week
[Hilton Head Island & Bluffton](#)
- 5/5/2025
Pork in the Parking Lot
[Hilton Head Island](#)
- 5/6/2025
AI Bootcamp
[Bluffton](#)
- 5/7/2025
Ethical AI Seminar
[Hilton Head Island](#)
- Beaufort Memorial Hospital
Groundbreaking for Bluffton
Community Medical Center
[Bluffton](#)
- Junior Leadership Graduation
[Hilton Head Island](#)
- 5/9/2025
Lotus Health Ribbon Cutting
[Bluffton](#)
- 5/15/2025
Bluffton Block Party at Agave
[Bluffton](#)
- 5/16/2025
Lowcountry Stone Boutique
Ribbon Cutting
[Hilton Head Island](#)

2025 DMO Industry Metrics Annual Report 22

5/16/2025
Lowcountry Stone Boutique
Ribbon Cutting
[Hilton Head Island](#)

5/20/2025
Leadership Class of 2025
Project Ribbon Cutting - Safe
to Shore
[Hilton Head Island](#)

5/21/2025
Biscuits & Benefits
[Hilton Head Island](#)

5/27/2025
Thai Smile Cuisine Ribbon
Cutting
[Hilton Head Island](#)

JUNE

6/2/2025
Power Hour Tele Town Hall
[Virtual](#)

6/4/2025
Leadership Graduation
[Hilton Head Island](#)

6/12/2025
Business Golf Classic
[Hilton Head Island](#)

6/18/2025
Juicebox Natural Wine and
Craft Beer Ribbon Cutting
[Bluffton](#)

6/24/2025
Chamber Champions
Reception
[Hilton Head Island](#)

6/25/2025
Conversation + Cocktails:
Hampton Hall
[Bluffton](#)

6/27/2025
Milkshake Factory Ribbon
Cutting
[Hilton Head Island](#)

Nala’s Beach Ribbon Cutting
[Hilton Head Island](#)

JULY

7/2/2025
Daily Café Ribbon Cutting
[Hilton Head Island](#)

7/9/2025
Power Hour Tele Town Hall
[Virtual](#)

7/30/2025
Origin Coffee Bar Ribbon
Cutting
[Hilton Head Island](#)

J. Banks in Residence Ribbon
Cutting
[Hilton Head Island](#)

Frank Babel Bike Path
Dedication
[Hilton Head Island](#)

AUGUST

8/12/2025
Hilton Head Preperatory 60th
Anniversary Ribbon Cutting
[Hilton Head Island](#)

8/13/2025
Leadership Class Orientation
[Hilton Head Island](#)

8/21/2025
Conversation + Cocktails:
Nectar Hilton Head Island
[Hilton Head Island](#)

South Carolina Chamber
Blueprint Luncheon
[Bluffton](#)

8/22/2025
Wildflower Girls Ribbon Cutting
[Bluffton](#)

8/24/2025
Junior Leadership Class
Orientation
[Hilton Head Island](#)

8/25/2025
Emry’s Bookshop Ribbon
Cutting
[Hilton Head Island](#)

8/27/2025
Historic Mitchelville Freedom
Park Groundbreaking for
the Archaeological Research
Facility and Auditorium
[Hilton Head Island](#)

8/29/2025
Ma Daisy’s Porch & Bluffton
Gullah Cultural Heritage
Center Ribbon Cutting
[Bluffton](#)

SEPTEMBER

9/10/2025
Links & Legacy Invitational
[Bluffton](#)

9/14/2025
Pockets Full of Sunshine
Ribbon Cutting
[Hilton Head Island](#)

9/17/2025
Biscuits & Benefits
[Hilton Head Island](#)

9/18/2025
Conversation + Cocktails: One
Hot Mama’s Hilton Head Island
[Hilton Head Island](#)

9/19/2025
Full Spectrum Studio Ribbon
Cutting
[Hilton Head Island](#)

9/24/2025
221B Studios Ribbon Cutting
[Bluffton](#)

9/25/2025
Executive Connection
at WaterWalk
[Hilton Head Island](#)

9/30/2025
Novant Health Westbury Park
Primary Care Ribbon Cutting
[Bluffton](#)

OCTOBER

10/6/2025
Gullah Museum of
Hilton Head Historic Outhouse
Ribbon Cutting
[Hilton Head Island](#)

10/9/2025
Chamber Young Professionals
at Hilton Head Distillery
[Hilton Head Island](#)

10/10/2025
Street Meet 20th Anniversary
Ribbon Cutting
[Hilton Head Island](#)

10/15/2025
State of the Region with
Governor Henry McMaster
[Hilton Head Island](#)

10/16/2025
Volunteers in Medicine “Edible
Parking Lot” Ribbon Cutting
[Hilton Head Island](#)

10/22/2025
Flowers by Katie Ford
Ribbon Cutting
[Bluffton](#)

10/23/2025
Conversation + Cocktails:
Palmetto Hall
[Hilton Head Island](#)

10/24/2025
Town of Bluffton Permanent Art
Structure Ribbon Cutting
[Bluffton](#)

Lavender Lounge Head Spa
Ribbon Cutting
[Bluffton](#)

Birdie James Bluffton
Ribbon Cutting
[Bluffton](#)

10/18/2024
Ribbon Cutting:
Hawaii Fluid Art HHI
[Hilton Head Island](#)

10/28/2025
Leadership Alumni Association
“Tales of the Lowcountry”
Speakers Event
[Hilton Head Island](#)

NOVEMBER

11/6/2025
Executive Connection
[Bluffton](#)

11/7/2025
Indigo Run Golf Club Re-
Opening Ribbon Cutting
[Hilton Head Island](#)

11/13/2025
Hail Mary’s Ribbon Cutting
[Bluffton](#)

Conversation + Cocktails:
Hail Mary’s
[Bluffton](#)

11/19/2025
Demure Head Spa Ribbon
Cutting
[Hilton Head Island](#)

11/20/2025
Beaufort Memorial
Hospital Emergency Room
Groundbreaking
[Hilton Head Island](#)

DECEMBER

12/3/2025
Nom Nom Poke Shop
Ribbon Cutting
[Bluffton](#)

Artware 25th Anniversary
Ribbon Cutting
[Hilton Head Island](#)

12/4/2025
Russel Stover Chocolates
Ribbon Cutting
[Hilton Head Island](#)

12/5/2025
Sandbox 20th Anniversary
Ribbon Cutting
[Hilton Head Island](#)

Historic Mitchelville Freedom
Park Era Garden Ribbon Cutting
[Hilton Head Island](#)

12/8/2025
Taylor Memorial Family Park
Groundbreaking
[Hilton Head Island](#)

12/9/2025
Radici Italian Chophouse
Ribbon Cutting
[Bluffton](#)

12/12/2025
Sparkles & Spirits
[Hilton Head Island](#)

12/19/2025
T2 Teaching and Tutoring
Ribbon Cutting
[Bluffton](#)

Media Impressions and the Dollar Equivalent

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

2,487
STORIES & MENTIONS

24,478,291,321
MEDIA IMPRESSIONS

\$31,719,802.95
AD EQUIVALENCY

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

2025

Stories & Mentions
2,487
Impressions
24,478,291,321
Ad Value
\$31,719,802.95

2024

Stories & Mentions
2,722
Impressions
24,796,409,713
Ad Value
\$32,430,886

2023

Stories & Mentions
2,138
Impressions
6,376,960,959
Ad Value
\$21,028,150.43

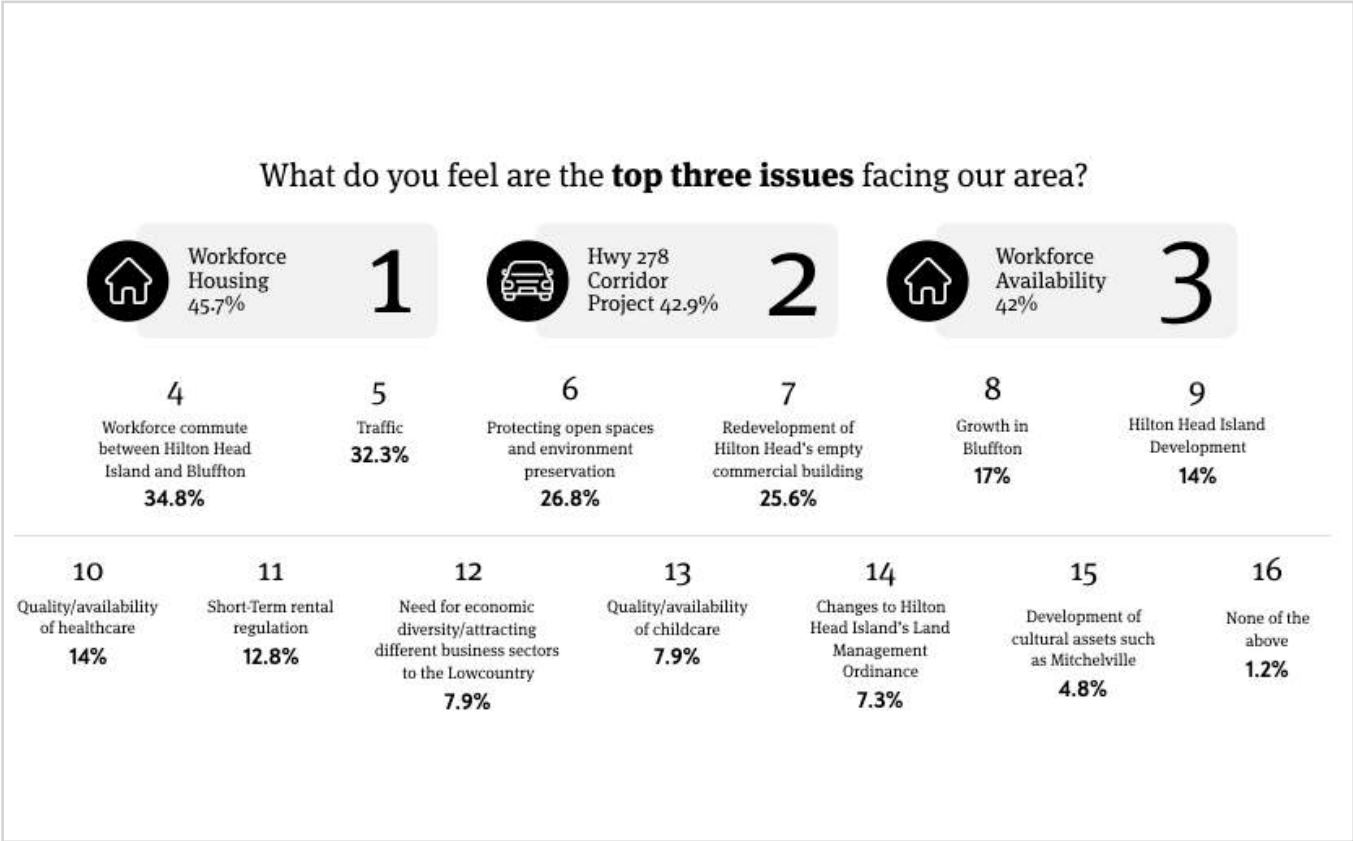
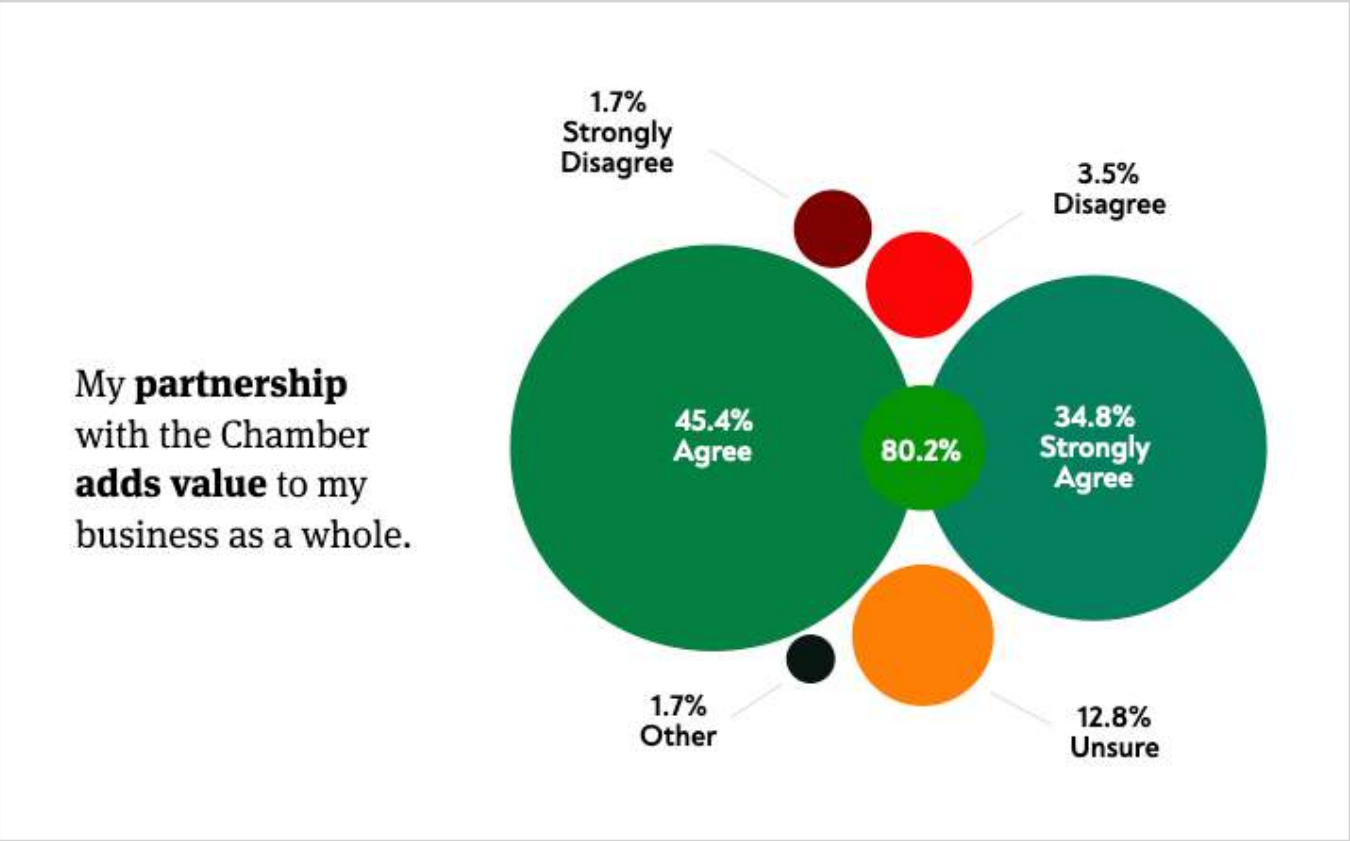
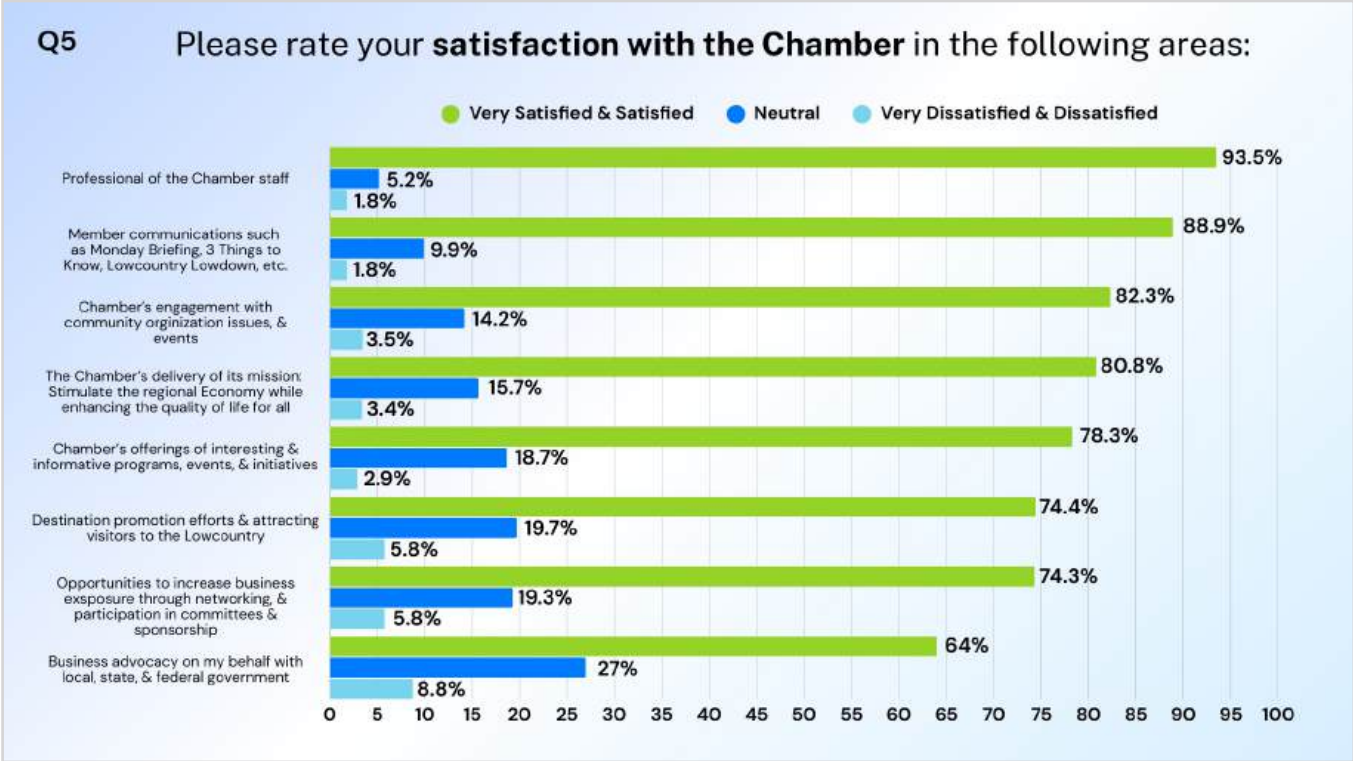
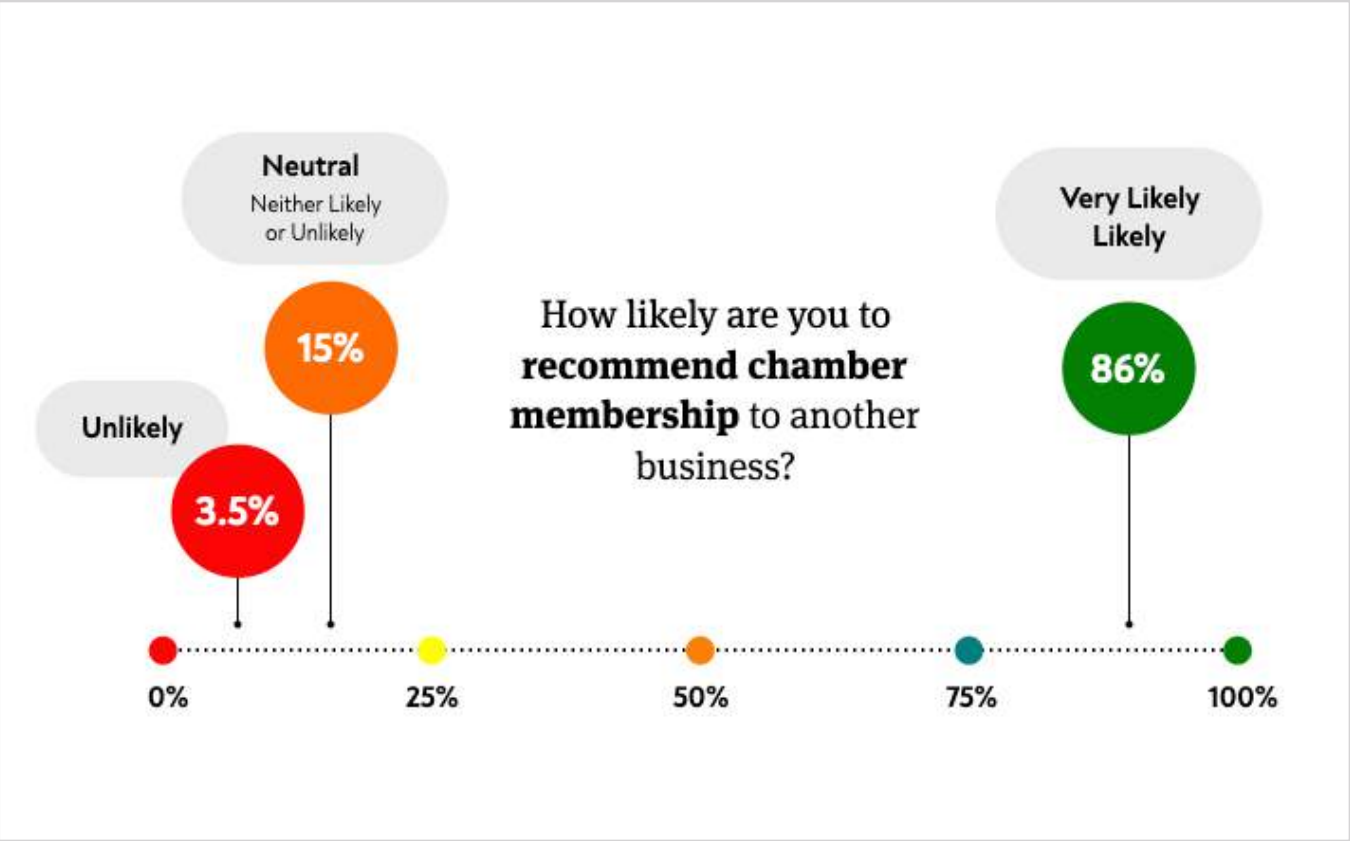
2022

Stories & Mentions
2,799
Impressions
11,119,754,831
Ad Value
\$21,119,046.34

2021

Stories & Mentions
2,316
Impressions
13,269,706,386
Ad Value
\$11,729,825.10

HIGHLIGHTS FROM THE CHAMBER MEMBERSHIP SURVEY





MARKETING COUNCIL MEETING SCHEDULE

November 18, 2026

Marketing Council Kick Off Meeting

January 27, 2027

Marketing Council Meeting

February 15, 2027

Draft Marketing Plan sent to Chamber Board of Directors & Marketing Council

February 22, 2027

Feedback due from Chamber Board of Directors & Marketing Council

March 1, 2027

Draft DMO Marketing Plan and FY 2027-2028 budget due to
Town of Hilton Head Island Town Manager

March 15, 2027

Feedback due from Town of Hilton Head Island Town Manager

March 18, 2027

DMO Workshop with Town of Hilton Head Island Town Council

April 6, 2027

Final Annual Package due to Town of Hilton Head Island Town Manager,
Assistant Town Manager, and Finance Director

April 22, 2027

Presentation to the Town of Hilton Head Island Accommodations Tax Advisory Committee

June 8, 2027

Presentation to the Town of Hilton Head Island Town Council

POINT OF CONTACT

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Hilton Head Island & Bluffton Chamber of Commerce

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**HILTON HEAD
ISLAND**
SOUTH CAROLINA