



Town of Hilton Head Island

Accommodations Tax Advisory Committee Meeting

Thursday, April 4, 2024, 9:00 AM

**1 Town Center Court, Hilton Head Island, SC
Benjamin M. Racusin Council Chambers**

The Accommodations Tax Advisory Committee meeting will be held in person at Town Hall in the Benjamin M. Racusin Council Chambers.

- 1. Call to Order**
- 2. Roll Call**
- 3. Adoption of the Agenda**
- 4. Approval of the Minutes**
 - a. Regular Meeting Minutes of October 30, 2023
- 5. Appearance by Citizens:** Citizens who wish to speak on the matters being discussed during the meeting may do so by contacting the Committee Secretary at 843-715-3241 no later than 4:30 p.m. the day prior to the meeting.
- 6. New Business**
 - a. Hearing Regarding the Hilton Head Island-Bluffton Chamber of Commerce/Visitor & Convention Bureau's proposed 2024-2025 Marketing Plan and Budget of Expenditures of the 30% Allocation of State Accommodations Tax Funds for the Advertising and Promotion of Tourism - Jeff Herriman, Interim Finance Director
 - b. Discussion Regarding Potential Amendments to the Calendar Year 2025 Accommodations Tax Grant Application - Shena Smith, Finance Assistant
 - c. Consideration and Approval of the Revised Calendar Year 2024 Accommodations Tax Advisory Committee Meeting Dates - Shena Smith, Finance Assistant
- 7. Adjournment**

FOIA Compliance: Public notification of this meeting has been published, posted, and distributed in compliance with the South Carolina Freedom of Information Act and the requirements of the Town of Hilton Head Island.

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Hilton Head Island will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Hilton Head Island ADA Coordinator as soon as possible but no later than 48 hours before the scheduled event.

Municipal Association of South Carolina (MASC) Civility Pledge:

"I pledge to build a stronger and more prosperous community by advocating for civil engagement, respecting others and their viewpoints, and finding solutions for the betterment of my city or town."



Town of Hilton Head Island
Accommodations Tax Advisory Committee
Thursday, October 30, 2023, at 9:00 a.m.
MEETING MINUTES

Present from the Committee: Jim Fluker, *Chairman*; Stephen Arnold, *Vice-Chairman*; Margaret Johnson, John Farrell, Cecile Eck, Martin Lesch, and Keith Schlegel

Absent from the Committee: None

Present from Town Council: Steve Alfred and Patsy Brison

Present from Town Staff: Josh Gruber, *Deputy Town Manager*; Jeff Herriman, *Interim Finance Director*; Erica Madhere, *Budget Analyst*; and Shena Smith, *Finance Assistant*

Present from the Media: None

1. Call to Order

The meeting was called to order at 9:00 a.m.

2. FOIA Compliance

Public notification of this meeting has been published, posted, and mailed in compliance with the Freedom of Information Act and the Town of Hilton Head Island requirements.

3. Roll Call- See as noted above.

4. Approval of the Agenda

- a. Chairman Fluker asked for a motion to approve the agenda. Mr. Arnold moved to approve the agenda as submitted. Mrs. Johnson seconded. By show of hands, the motion was approved by a vote of 7-0-0.

5. Approval of Minutes

- a. Accommodations Tax Advisory Committee Meeting, September 28, 2023

Chairman Fluker asked for a motion to approve the meeting minutes from September 28, 2023. Mrs. Johnson moved to approve the meeting minutes as submitted. Mr. Arnold seconded. By show of hands, the motion was approved by a vote of 7-0-0.

- b. Accommodations Tax Advisory Committee Meeting, October 12, 2023

Chairman Fluker asked for a motion to approve the meeting minutes from October 12, 2023. Mr. Schlegel moved to approve the meeting minutes as submitted. Mr. Lesch seconded. By way show of hands, the motion was approved by a vote of 6-0-1 with Mr. Arnold abstaining.

- c. Accommodations Tax Advisory Committee Meeting, October 19, 2023

Chairman Fluker asked for a motion to approve the meeting minutes from October 19, 2023. Mr. Arnold moved to approve the meeting minutes as submitted. Mr. Schlegel seconded. By show of hands, the motion was approved by a vote of 7-0-0.

6. Appearance by Citizens

Shena Smith, Committee Secretary, stated that comments concerning agenda items were to be submitted electronically via the Town's Open Town Hall portal. The public comment period closed the day prior to the meeting at 4:30 p.m. At the conclusion of the Open Town Hall, there was no public comment and no citizens signed up to speak.

7. Unfinished Business - None

8. New Business

a. Review & Recommendation for the 2024 Accommodations Tax Grants.

Jeff Herriman, Interim Finance Director, displayed a spreadsheet listing all applicants along with the amount each applicant requested. Mr. Fluker, Chairman, spoke with the Committee regarding the process of funding for organizations that applied and how best to navigate the list for awarding each amount.

Committee members made their way through the list alphabetically and discussed each individual application. Ultimately, the Accommodations Tax Advisory Committee decided upon the following recommendations:

Town of Hilton Head Island			
Accommodations Tax Grants 2024 Requests and Recommendations			
Grantee Agency	2024 GRANTS		
	2024 Applicant Request	ATAC Recommendation	Town Council Award
Art League of Hilton Head	75,000	75,000	
Arts Center of Coastal Carolina	430,000	430,000	
David M. Carmines Memorial Foundation	181,000	181,000	
Gullah Museum of Hilton Head Island	150,000	150,000	
Gullah Roots Historical Foundation	200,000	-	
Habitat for Humanity of the Lowcountry	150,000	-	
Harbour Town Merchants Association	29,000	29,000	
HHI Audubon Society	20,100	20,100	
HHI Choral Society	15,000	15,000	
HHI Concours d'Elegance	362,000	362,000	
HHI Dance Theater	20,000	20,000	
Hilton Head Island Airport	150,000	150,000	
Hilton Head Island Bridge Association	15,000	15,000	
Hilton Head Island Land Trust	37,300	36,632	
HHI Rec Assoc.(Wingfest & Other Festivals)	60,000	60,000	
HHI St. Patrick's Day Parade	86,000	74,065	
HH MLK Committee for Justice	5,000	4,513	
HHI Wine & Food, Inc (Rhythm and Brews)	30,000	30,000	
HHI Wine and Food Fest)	130,000	130,000	
HHI Symphony Orchestra	330,000	330,000	

Lean Ensemble Theatre	50,000	50,000	50,000
Lowcountry Golf Course Owners Assoc.	100,000	100,000	100,000
Long Cove Club	59,240	56,653	56,653
Lowcountry Gullah	100,000	100,000	100,000
Mitchelville Preservation Project	190,000	190,000	190,000
Native Island Business & Community	225,000	225,000	225,000
Palmetto Quilt Guild	7,500	7,500	7,500
Paul Miller Fund	50,000	16,500	16,500
Sea Pines Forest Preserve	40,000	40,000	40,000
Sea Turtle Patrol HHI	70,000	55,040	70,000
Shelter Cove Harbour Company	244,600	244,600	244,600
TEDx Hilton Head	45,000	45,000	45,000
The Boys & Girls Club of Hilton Head	40,000	40,000	40,000
The Coastal Discovery Museum	375,000	375,000	375,000
Coastal Disc. Museum(Honey Horn)	300,000	300,000	300,000
The First Tee of the Lowcountry	40,000	40,000	40,000
The Heritage Library	135,000	135,000	135,000
The Outside Foundation	72,000	72,000	72,000
The Sandbox	60,765	60,765	60,765
University of South Carolina	83,188	2,000	2,000
World Affairs Council of HHI	5,000	-	-
Subtotal	4,767,693	4,267,368	4,282,328
Total Grants	4,767,693	4,267,368	4,282,328

Mr. Schlegel made a motion to approve the recommendations as assigned and displayed on the projected spreadsheet (summarized in the table above). Mr. Arnold seconded the motion. All Committee members voted unanimously to approve with the final vote of 7-0-0, (except for individual line items where individual committee members recused themselves. *

*During the presentation of the Lowcountry Golf Course Owners Association and First Tee of the Lowcountry, Mr. Farrell disclosed a potential conflict of interest and did not participate. During the Hilton Head MLK Committee for Justice presentation, Mrs. Johnson recused herself for a potential conflict of interest and did not participate. The required disclosure forms are on file.

9. Chairmans's Report

Mr. Fluker thanked members of the committee and the hours put in to review all the applications. There is a lot of consideration that goes into the process of reviewing requests in addition to the time spent on each of the applicant's documents.

10. Adjournment

At 10:36 a.m. Mr. Fluker adjourned the meeting.

Submitted by: Shena Smith, Secretary

Approved:

DRAFT



TOWN OF HILTON HEAD ISLAND

Staff Report Memo

TO: Accommodations Tax Advisory Committee
FROM: Jeff Herriman, Interim Finance Director
VIA: Marc Orlando, Town Manager
CC: Josh Gruber, Deputy Town Manager
CC: Angie Stone, Assistant Town Manager
DATE: March 28, 2023
SUBJECT: Hearing Regarding the Hilton Head Island-Bluffton Chamber of Commerce/Visitor & Convention Bureau's proposed 2024-2025 Marketing Plan & Budget of Expenditures of the 30% Allocation of State Accommodations Tax Funds for the Advertising and Promotion of Tourism

RECOMMENDATION:

Staff recommends the Accommodations Tax Advisory Committee review for recommendation the Fiscal Year 2024-2025 VCB Marketing Plan and Budget. Once recommended, it will then be forwarded to the Finance & Administrative Committee for review and discussion and then to Town Council for final review and approval.

BACKGROUND:

On April 4, 2024, the VCB will present in detail to ATAC its proposed budget and marketing plan for 2024-2025. The plan is presented in a format as previously recommended by ATAC and Town Council. The budget breaks down expected revenues and expenses in rows by functional categories and in columns by the major funding sources with the Town of Hilton Head Island on pages 16 - 17 with a budget of \$4,000,000.

SUMMARY:

According to State law, 30% of the two percent bed tax funds collected by the State of South Carolina is allocated to the pre-determined Destination Marketing Organization with an ongoing tourist program, which the Town Council has designated the VCB. Town Code requires ATAC to review the VCB's proposed budget and marketing plan each year and make a recommendation to Town Council.

ATTACHMENTS:

1. 2024-2025 Hilton Head Island Destination Marketing Plan & Budget

An aerial photograph of Hilton Head Island, South Carolina, showing a wide sandy beach, ocean waves, and coastal vegetation. In the distance, a cluster of buildings is visible on the right side of the island.

FISCAL YEAR 2024-2025

HILTON HEAD ISLAND DESTINATION MARKETING PLAN

HILTON HEAD ISLAND
SOUTH CAROLINA

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STRATEGIC MARKETING PLAN

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IT STARTS WITH A VISIT

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

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

The FY 2024-2025 Destination Marketing Plan ladders into our organization's three-year Strategic Plan and ultimately into our community-centric 10-year Destination Management Plan. Our approach

to long-term tourism success sits alongside the Town of Hilton Head Island's 20-year comprehensive plan. Our efforts complement and support a vibrant and collaborative partnership with the Town of Hilton Head Island to ensure the future of the destination for residents and visitors.



VISION

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

MISSION

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



DEFINING OUR COMMUNITY CORNERSTONE

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

For any destination to ensure its competitive advantage and increase visitor revenue, there must be a clear strategic framework for developing, articulating, and promoting the destination brand. That is why destination marketing and management organizations exist. They have the unique mandate to

steward the community's identity and reputation in the global visitor marketplace daily.

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

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

DESTINATION VALUES

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



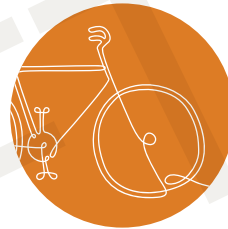
Ecotourism



History



Arts & Culture



Recreation



Wellness

DEMONSTRATING OUR VALUES

ECOTOURISM

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

ARTS & CULTURE

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

HISTORICAL HERITAGE

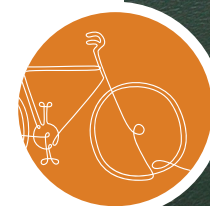
As we look to further establish the destination as a place for heritage travel we will work alongside the community to gather assets, collecting the rich history it holds and documenting it through various touchpoints for visitors to explore. We will also engage our partners within the community and tour operators to document and preserve the rich history of the island through visual storytelling, robust itineraries, and digital campaigns.

WELLNESS

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

RECREATION

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





DESTINATION GOALS

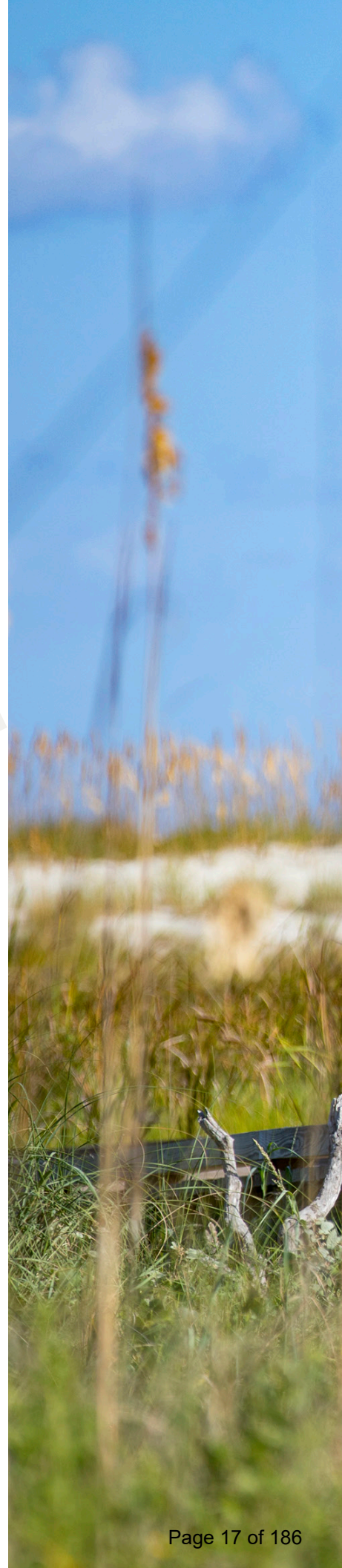
A PLAN OF ACTION. A VISION FOR THE COMMUNITY.

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

GOALS 1-5

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

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





GOALS 1-5

GOALS	STRATEGIES
1 CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE	Community campaign and brand bootcamp Resident and visitor surveys Put the Beach to Bed campaign
2 CREATE AN UNDERSTANDING OF AND RESPECT FOR OUR DELICATE ECOSYSTEM	Eco Campaign
3 DRIVE THE DISCOVERY AND EXPLORATION OF THE DESTINATION	Lead generation ads Island Time Blog Paid social media Search optimization Social media video/Reels/stories User generated content Chatbot evolution and optimization Digital experience personalization
4 BUILD BRAND AWARENESS	Digital display Connected TV and traditional broadcast Programmatic advertising Audio advertising Traditional ad placements (print and digital) Social media marketing (Facebook, Instagram, Spotify, Pinterest, Twitter) User generated content curation Public relations (media outreach, partnerships, influencers, and earned media placements)
5 ENHANCE LEISURE AND MEETING AND GROUP BUSINESS BY SUPPORTING QUALIFIED VISITATION	Email marketing Social and display remarketing advertising Search engine marketing Search engine optimization and local search Digital experience personalization LinkedIn (organic and paid) Networking Meetings and groups paid digital media

KEY PERFORMANCE INDICATORS

Community sentiment survey and continued benchmarking
Visitor Profile study

Campaign landing page visits

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

Brand lift study
Website traffic
Paid media impressions

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

2023 RESULTS

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

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

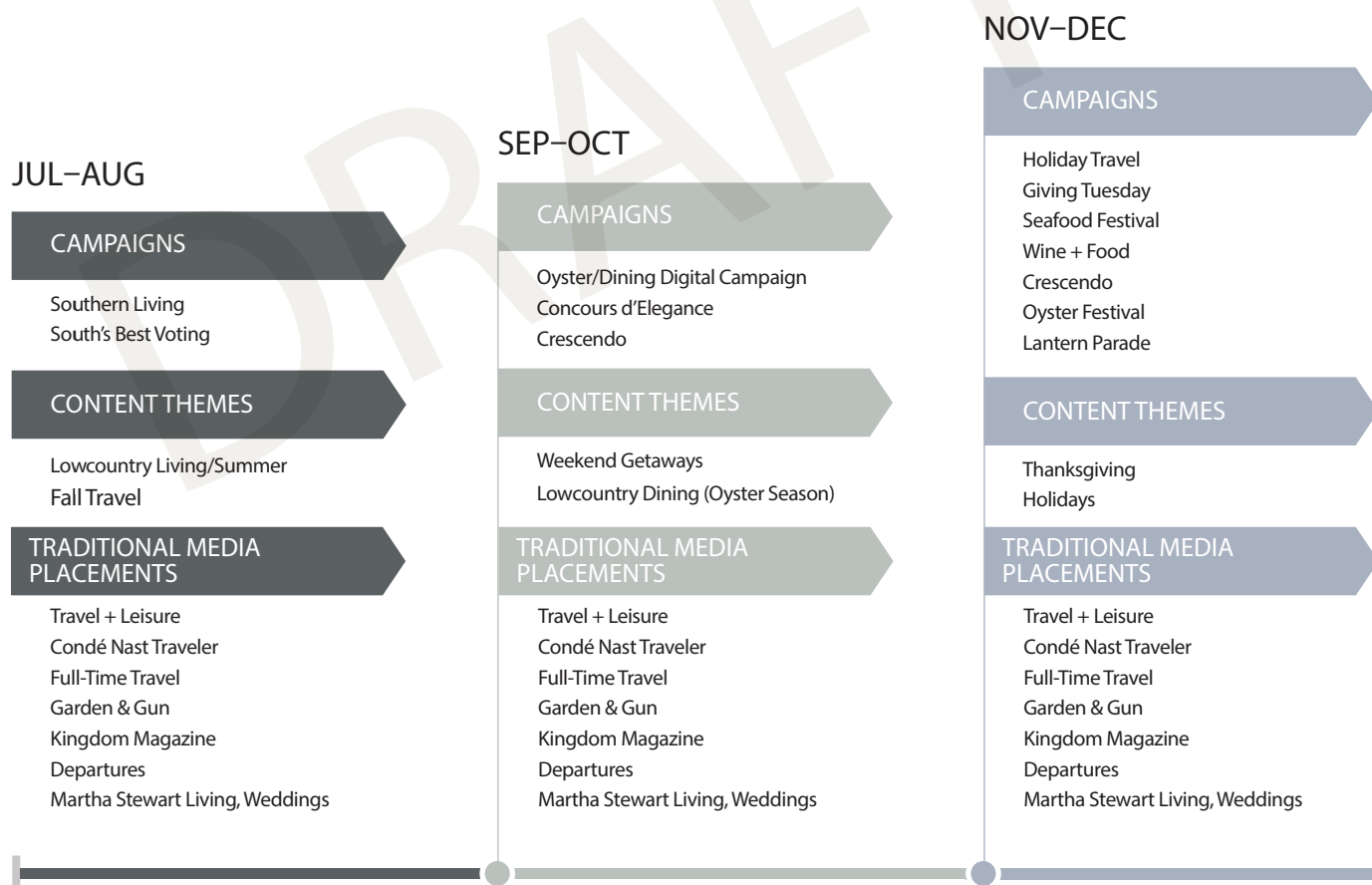
Email list growth of 143,826 (8.9%)
Time spent on blog 3:04 (flat)
Social referrals 345,816 (+12.4%)
Bounce rate 46% (-8.8)
Time on site 1:50 (+2.1%)
Pages per visit 1.8 (+2.2%)
Chatbot engagements 2,685 (+60.3%)

Brand lift study being will be completed this fiscal year.
Website traffic 3,064,623 (-10.2%)
129 million paid partner media impressions

Website traffic 3,064,623 (-10.2%)
1,610,210 partner referrals (-5.2%)
Home and Villa
Occupancy 45% (+4%) ADR \$496.00 (+13%) RevPar \$221.00 (+18%)
Hotel
Occupancy 59.7% (-2.2%) ADR \$246.82 (+2.9%) RevPar \$147.39 (+0.7%)
Direct solicitations 535 (phone calls, emails, social outreaches)
Sales appointments 352
101 (+73.2%) leads sent to properties

2024-2025 MARKETING ROADMAP

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



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



JAN-FEB

CAMPAIGNS

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

CONTENT THEMES

Fresh Start
Lowcountry Love

TRADITIONAL MEDIA PLACEMENTS

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

MAR-APR

CAMPAIGNS

RBC Heritage
Travel + Leisure Voting
Condé Nast Traveler Voting
WingFest

CONTENT THEMES

RBC Heritage
Spring in Swing: Golf, Fishing, Biking

TRADITIONAL MEDIA PLACEMENTS

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

MAY-JUN

CAMPAIGNS

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

CONTENT THEMES

Wildlife/Conservation
Ready for Summer

TRADITIONAL MEDIA PLACEMENTS

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

BUDGET

HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

Hilton Head Island Visitor & Convention Bureau Schedule of Functional Revenues and Expenditures

FY 2024-2025 BUDGET

	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co. DMO	Membership
Revenues								
Town of HHI DMO	4,000,000	4,000,000						
Private Sector	475,000		475,000					
SCPRT Destination Specific	625,000			625,000				
SCPRT Coop	625,000				625,000			
Private Match Coop	2,600,000				2,600,000			
Town of Bluffton DMO	350,000					350,000		
B/C Bluffton & Dauskie	365,000						365,000	
Total Revenues	9,040,000	4,000,000	475,000	625,000	3,225,000	350,000	365,000	1,950,000
Membership Revenue								
Total Revenues with Membership	10,990,000							
Expenses								
Media Partnerships								
Media Buys	960,000	776,107	49,337	134,556				
	960,000	776,107	49,337	134,556				
Social Media								
Partner Promotions	60,000	48,507	3,084	8,410				
Paid Brand Social Media	170,000	137,436	8,737	23,828				
Social Media Management	76,317	61,698	3,922	10,697				
Sub-total	306,317	247,640	15,743	42,934				
Digital Marketing								
Digital Strategy, Web Maintenance & Support	80,000	64,676	4,111	11,213				
Technology Improvements	60,000	48,507	3,084	8,410				
SEO	24,000	19,403	1,233	3,364				
SEM / Display	569,754	460,614	29,281	79,858				
Managed Web Hosting and Content Delivery Network	1,800	1,455	93	252				
eNewsletter/Drip Campaign	30,000	24,253	1,542	4,205				
Digital Contingency	0	0	0	0				
Sub-total	765,554	618,908	39,344	107,302				
Destination PR								
PR Strategy, Maintenance & Support	276,000	223,131	14,184	38,685				
Journalists/Influencers/Partnerships	50,000	40,422	2,570	7,008				
Monitoring Services (Print/Online/Broadcast Tracking)								
PR Contingency	18,300	14,795	940	2,565				
Sub-total	394,300	318,770	20,264	55,266				
Group Sales & Marketing								
Promotional Giveaways	50,000	40,422	2,570	7,008				
Program Incentives	2,000	1,617	103	280				
VCB Dues, Subscriptions and Training	90,000	72,760	4,625	12,615				
Tradeshows	35,000	28,296	1,799	4,906				
In-Market Events	15,000	12,127	771	2,102				

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

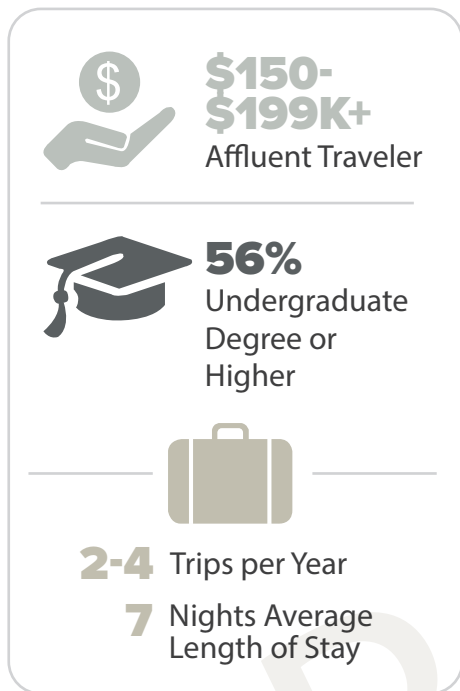
VCB Sales, Mkt. Services & Ops:

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

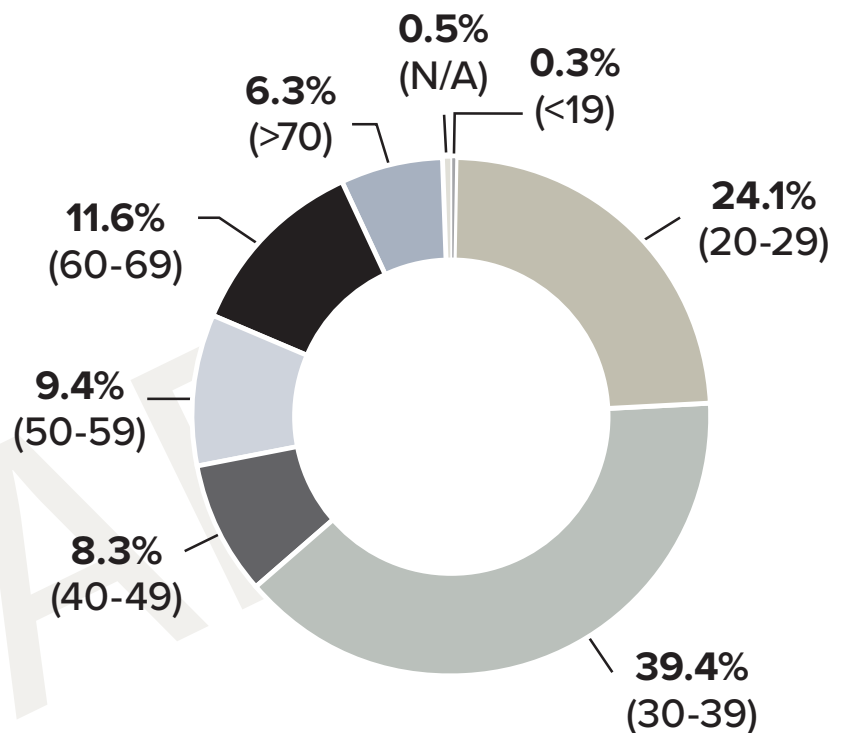
	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co. DMO	Membership
SCPRT								
SC PRT - Leisure	1,300,000				1,300,000			
SC PRT - Sports	1,002,749				1,002,749			
SC PRT - Meetings & Groups	828,500				828,500			
Sub-total	3,131,249				0	3,131,250		
Town of Bluffton DMO						218,750		
Promotions	218,750							
B/C Bluffton & Daufuskie DMO								
Promotions	228,125						228,125	1,950,000
TOTAL VCB EXPENSES	9,040,000	4,000,000	475,000	625,000	3,225,000	350,000	365,000	10,990,000
Difference btw Revenue & Expense	0	0	0	0	0	0	0	0
Total Expenses with Membership	10,990,000							
Revenues Minus Expenses:	0							
Revenues & Expenses for HHI-related marketing programs								
Revenues & Expenses for other marketing programs								

OUR TARGET LEISURE TRAVELER

2023 VISITOR PROFILE STUDY



AGE DISTRIBUTION



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

DEMOGRAPHICS AND PERSONAS



Weekenders



Families



Snowbirds

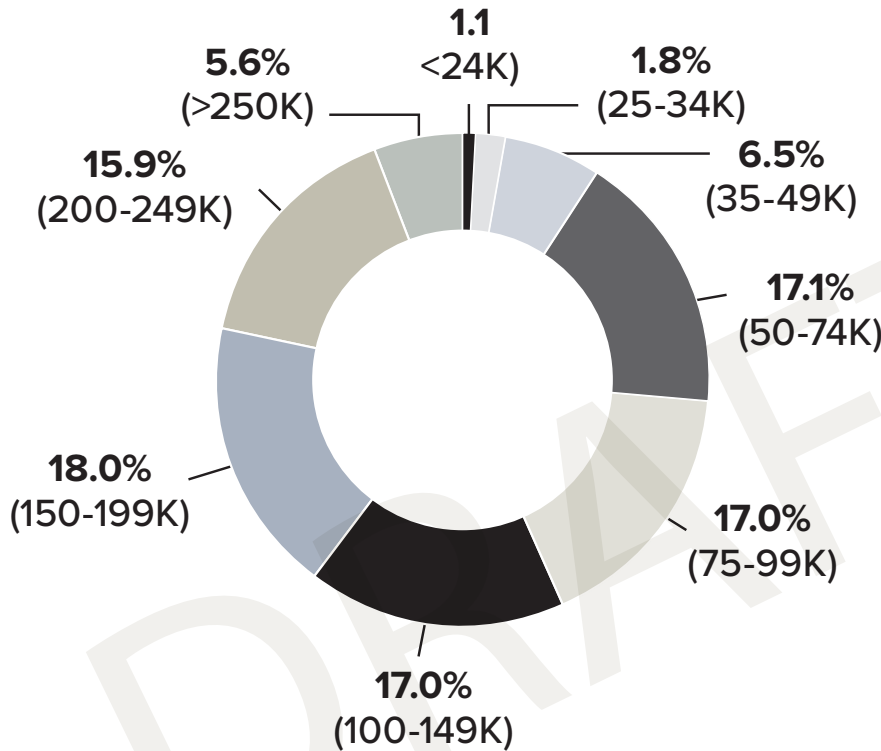


Sports
Enthusiasts

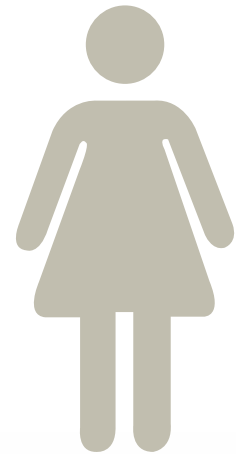


Culinary
Explorers

HOUSEHOLD INCOME DISTRIBUTION



**45%
MALE**



**55%
FEMALE**



Wellness
Traveler



Arts, History &
Cultural Enthusiasts



International
Travelers

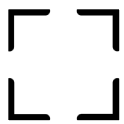




STRATEGIC MARKETING PLAN

MARKETING PLAN STRATEGIES & TACTICAL DETAILS

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



AREAS OF FOCUS

LEADING WITH COMMUNITY IN MARKETING

We will highlight, celebrate, and feature our locals, their businesses, offerings, and unique identities across all our marketing channels and touchpoints. We will strive to add layers of additional authenticity by engaging with the Gullah community, sustainability and conservation partners, and others.

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



DESTINATION WEBSITE PLATFORMS

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

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

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

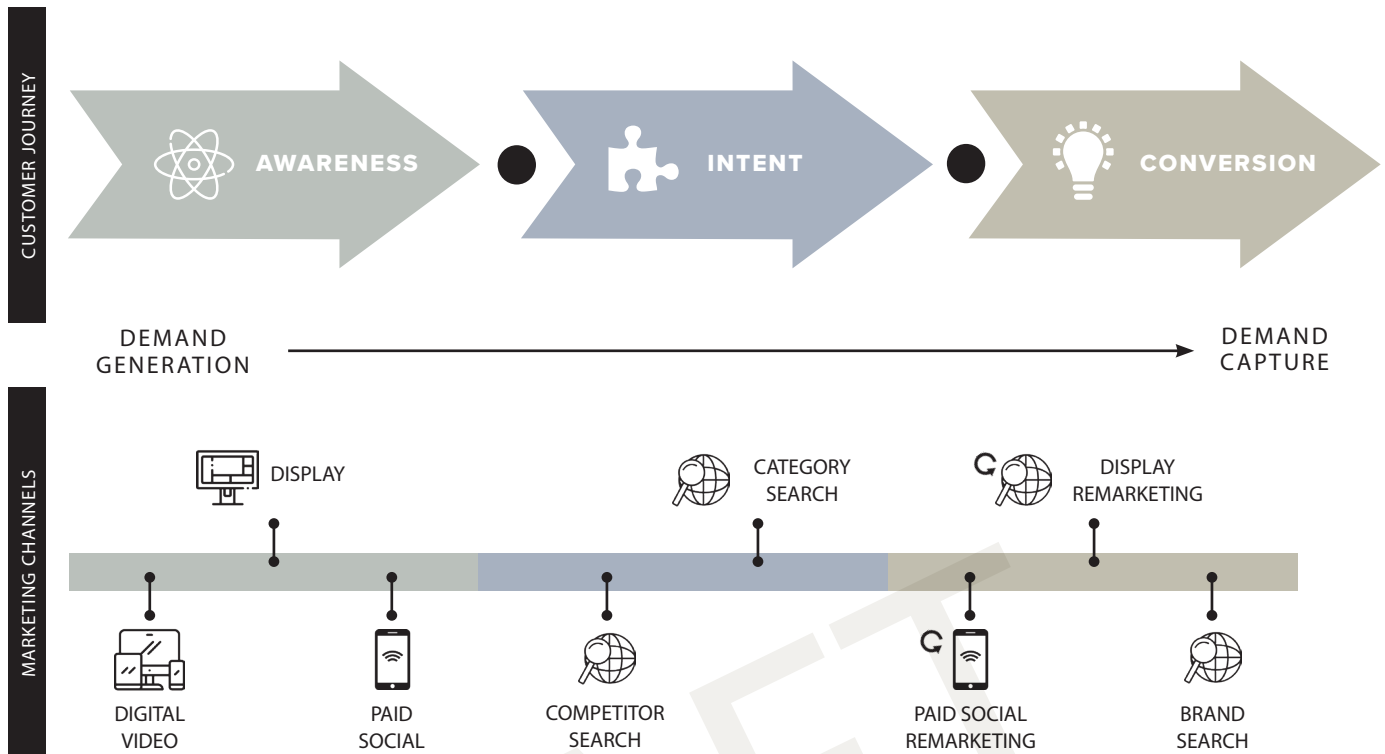
As we embark on this journey, our commitment to excellence remains unwavering. We will continue to listen to feedback, analyze data, and implement innovative solutions to deliver an exceptional online experience that truly reflects the essence of our destination.



RESIDENT AND VISITOR SATISFACTION SURVEYS

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

AUDIENCE TARGETING WITH DIGITAL MEDIA



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

The 2024-2025 marketing plan will consist of the following marketing channels:

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



VIDEO IN CONTENT MARKETING

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

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



DIGITAL ADVERTISING

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

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

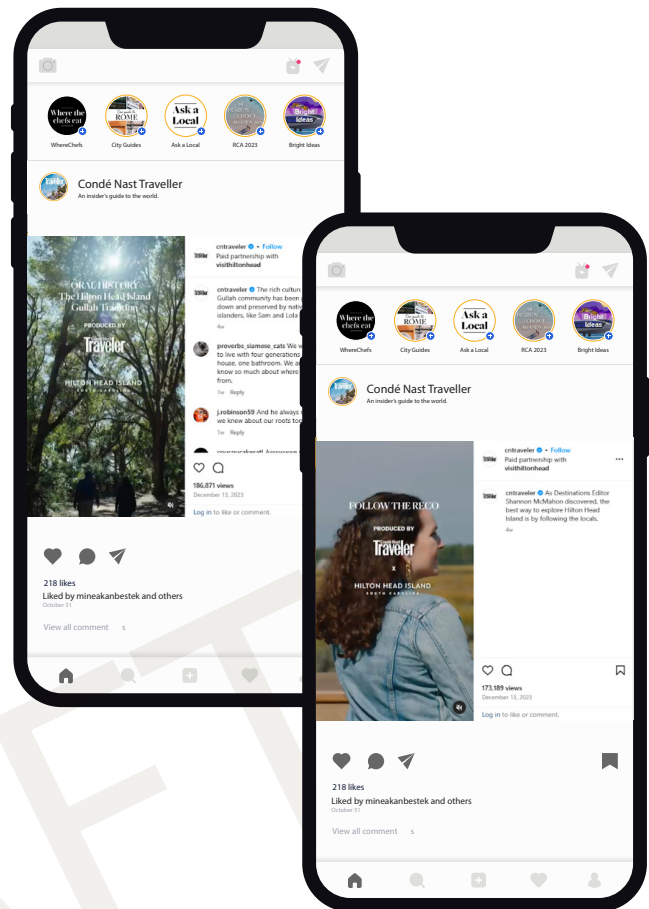


EMAIL

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

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

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



EVENT CONTENT

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

BEFORE

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

DURING

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

AFTER

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

SOCIAL CHANNEL PRIORITIES FOR 2024-2025

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

FACEBOOK

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

INSTAGRAM

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

TIKTOK

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

PINTEREST

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

SPOTIFY

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

YOUTUBE

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

LINKEDIN

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

TOTAL ORGANIC AUDIENCE 357,284

ISLAND TIME BLOG

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

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

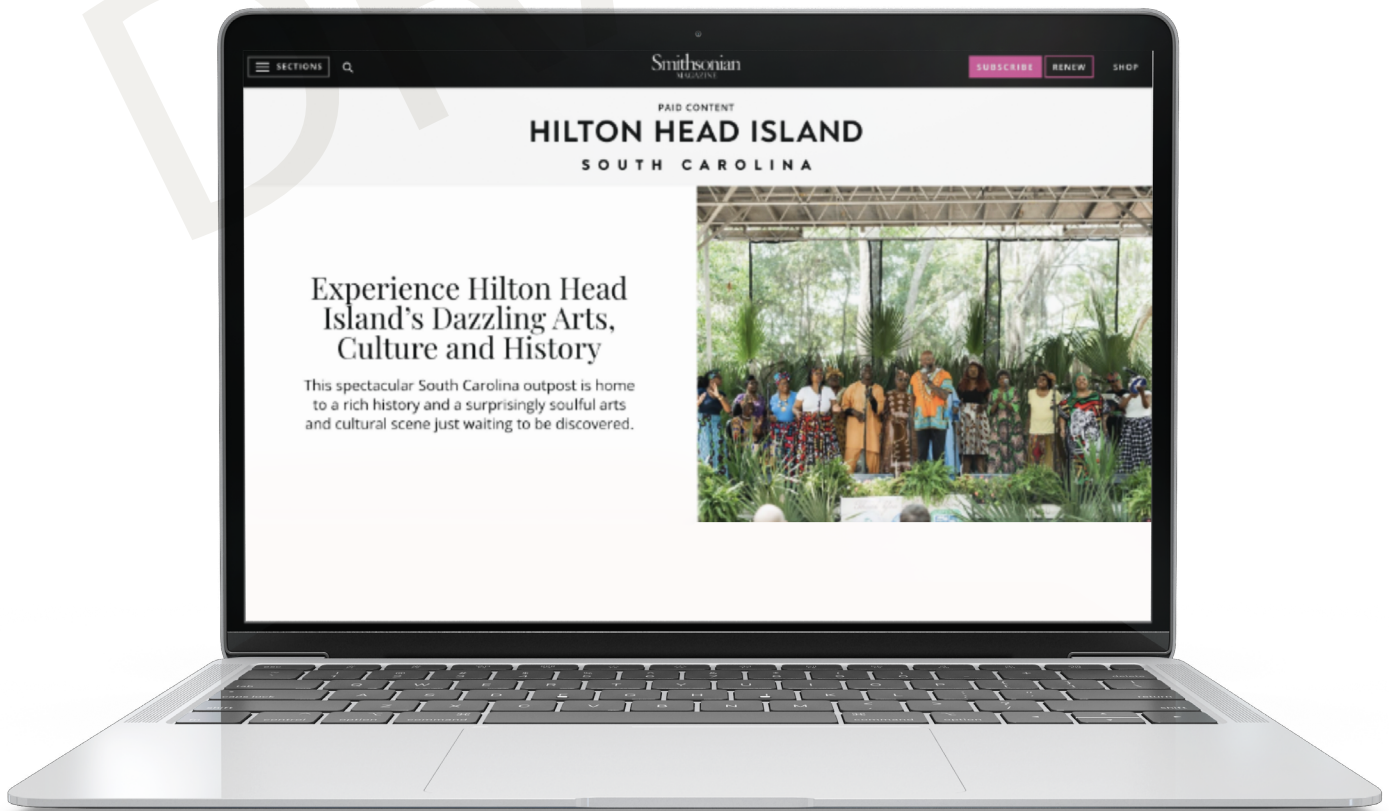
- » For Different Demographics
- » For Different Interests
- » For Different Vacation Lengths

LEISURE MEDIA PARTNERSHIPS

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

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

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



MEDIA PARTNERSHIPS

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

DEPARTURES

BY THE NUMBERS

95.4B
TRAVEL

\$19.4B
FASHION &
ACCESSORIES

\$13.9B
AIRLINES

\$2.4B
WINE & SPIRITS

\$18B
LODGING

\$383.6B
OVERALL CARD
MEMBER SPEND

35-64
CARD MEMBER
AGE RANGE

\$5.7B
JEWELRY & WATCHES

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

AUDIENCE

BY THE NUMBERS

9.9MM
AFFLUENT AUDIENCE

962,867
CIRCULATION

11.3MM
DIGITAL UVS

15.7MM
SOCIAL MEDIA
FOLLOWERS

DIGITAL ENGAGEMENT

BY THE NUMBERS

12.8MM
UNIQUE VISITORS

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

27.7MM
VIEWS

3:13
AVERAGE MINUTES
SPENT ON A PAGE

CONDÉ NAST TRAVELER

BY THE NUMBERS

\$11B
SPENT ON TRAVEL

1.2X
LUXURY TRAVELERS

1.5X
CULTURE SEEKERS

1.3X
CULINARY TRAVELERS

3.2M
PRINT READERS

4.6M
AVG. MONTHLY
DIGITAL UNIQUES

22M
AVG. MONTHLY
VIDEO VIEWS

9M
SOCIAL FOLLOWERS

KINGDOM

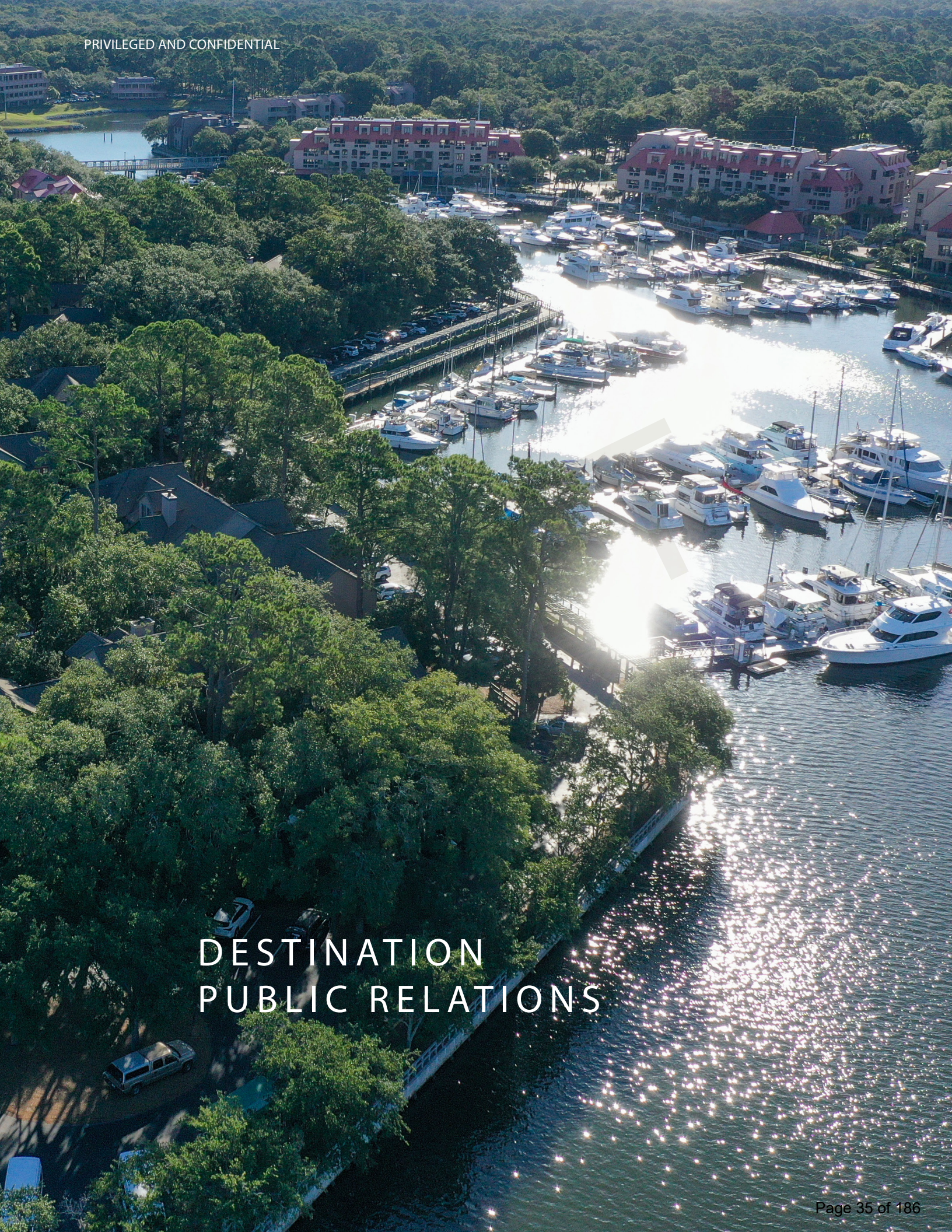
BY THE NUMBERS

761K
TOTAL READERSHIP

171K
SOCIAL FOLLOWERS

205K
PRINT DISTRIBUTION

60K
EMAIL SUBSCRIBERS



DESTINATION PUBLIC RELATIONS

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

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

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

MEDIA LANDSCAPE

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

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

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

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

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

TRENDS TO CONSIDER FOR HILTON HEAD

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

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

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

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

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

TARGET AUDIENCES

While our targets are familiar, we'll find new and engaging verticals to reach audiences that are most likely to travel and return to Hilton Head Island:

FAMILIES AND GROUPS: Family travel will remain top of mind, especially considering new travel trends such as skip-gen travel, where grandparents are taking their grandkids on vacation.

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

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

PRIORITY FOCUS AREAS

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

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

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

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

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

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

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

2024-2025 PR TACTICS

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

VISITING JOURNALIST/INFLUENCER PROGRAM: Craft narratives that will meaningfully resonate with travelers by customizing media and influencer itineraries that highlight priority verticals and evergreen offerings.

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

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

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





MEETINGS & GROUP SALES

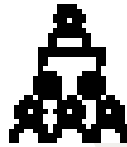
The meetings and group industry continues to recover, and Hilton Head Island offers a unique opportunity for groups of all sizes.

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



Corporate Hosting

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



Association Events

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



Reunions

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



Family & Military Groups

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



Motorcoach Tours

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



Religious Groups

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



Government Groups

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





INTERNATIONAL MARKETING

OUR STRATEGY

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

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

COLLATERAL AND FULFILLMENT

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

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

PROMOTIONS AND BROCHURE DISTRIBUTION

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

The books are distributed through:

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



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



OUR COMMUNITY CORNERSTONE

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





APPENDIX

GLOSSARY OF TERMS

HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

Board of Directors & DMO Marketing Council

DEMOGRAPHICS

COMMUNITY CORNERSTONE PLAN

2023 Performance, Goals 1-5

MMGY INTELLIGENCE

Community Sentiment Survey Executive Summary, Wave 3

OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

2023 Visitor Profile Study

OFFICE OF TOURISM ANALYSIS, COLLEGE OF CHARLESTON

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

VERB INTERACTIVE

2023 Digital and Social Media Marketing Recap

WEBER SHANDWICK

2023 Public Relations Recap



GLOSSARY OF TERMS

FULFILLMENT

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

HOTEL, HOME & VILLA OCCUPANCY

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

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

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

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

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

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

MEDIA PARTNERSHIPS

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

HHI - Household Income noted in Media Partnership section

PUBLIC RELATIONS

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

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

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

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

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

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

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

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

REPORTING PLATFORMS

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

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

STR - Smith Travel Research (STR).

SOCIAL MEDIA

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

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

Total Audience - Number of followers across each platform combined.

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

WEBSITE PERFORMANCE

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

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

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

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

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



2024 BOARD OF DIRECTORS

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The Beach House,
Hilton Head Island

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Lola Campbell, Esq.
Binya Boutique, LLC

VICE CHAIR, VISITOR & CONVENTION BUREAU

Mike Tighe
Westin Hilton Head Island
Resort & Spa

IMMEDIATE PAST CHAIR

Susana Cook
Hilton Garden Inn

VICE CHAIR, FINANCE

Ray Warco
Center for Strategic Planning -
USCB

PRESIDENT & CEO

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

VICE CHAIR, BLUFFTON REGIONAL BUSINESS COUNCIL

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Ahmad Ward
Historic Mitchelville
Freedom Park

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Sonesta Resort Hilton Head Island

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Forsythe Jewelers

Caleb Graham
Ocean Oak Resort by
Hilton Grand Vacations

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Palmetto Dunes P.O.A.

Joel Braun
Hargray

Greg Kelly
Savannah/Hilton Head
International Airport

Joel Taylor
Hilton Head Regional Healthcare

Joe Caruso
Disney's Hilton Head
Island Resort

Steve Wilmot
Heritage Classic Foundation

Alan Wolf
SERG Restaurant Group

FY 2024-2025 MARKETING COUNCIL MEMBERS

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

Vice Chairman, Visitor & Convention Bureau
Mike Tighe
Westin Hilton Head Island Resort & Spa

Arts Seat
Natalie Harvey
Director of Cultural Affairs
Town of Hilton Head Island

Attractions Seat
Rex Garniewicz, Ph.D.
President & CEO
Coastal Discovery Museum

Convention Property Seat
Teresa Manzollilo
Director of Sales and Marketing
Hilton Beachfront Resort and Spa

Convention Property Seat
OPEN

Cultural/ Historical Seat
Ahmad Ward
Executive Director, Historic Mitchelville Freedom Park

Ecotourism Seat
Mike Overton
Founder & CEO
Outside Brands

Entertainment Seat
Ryan Larson
Director of Marketing
SERG Group

Festival & Event Seat
Chris Brewer
President
Hilton Head Island Concours d'Elegance & Motoring Festival

Golf Seat
Brad Marra
Chief Operating Officer
Palmetto Dunes Oceanfront Resort

Home & Villa Seat
Dru Brown
Managing Partner
Island Time Hilton Head

Outdoor Recreation/ Sports
Julie Jilly
Vice President
Professional Tennis Registry

Restaurant Seat
Catherine Reilley
Director of Marketing and Operations
Coastal Restaurants & Bars (CRAB)

Retail Seat
Beth Patton
Marketing Manager
Forsythe Jewelers

Transportation & Tours Seat
Lori Lynah
Director of Marketing and Air Service Development
Savannah/Hilton Head International Airport

Transportation & Tours Seat
Jon Rembold
Airports Director
Hilton Head Island Airport/Beaufort Executive Airport

Town Council
Councilman Alex Brown
Ward 1

Town Representatives
Angie Stone
Assistant Town Manager
Town of Hilton Head Island

Andrew Davis
Marketing & Communications Director
Town of Hilton Head Island

Kelly Spinella
Marketing & Brand Manager
Town of Hilton Head Island

COMMUNITY CORNERSTONE PLAN

GOAL #1

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.

STRATEGY

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

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.

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.

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

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.

TACTICS

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

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

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

Implement annual resident sentiment survey.

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

Benchmark and update resident sentiment results annually.

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.

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.

COMMUNITY CONERSTONE PLAN (CONTINUED)

GOAL #2

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.

STRATEGY	TACTICS
Assist in the awareness of career opportunities and recruitment of talent for all residents and throughout the region.	Start a local job sourcing platform pulling in local career opportunities. Simultaneously position the Lowcountry lifestyle and real estate opportunities within this framework. e.g. aggregate all real estate listings, pull in VCB channels to showcase lifestyle. Showcase the diversity of career opportunities that exist throughout the destination.
Assess availability of existing structures and government-owned land to potentially develop workforce housing on/off island.	Chamber to establish a working relationship with the Affordable Housing Committee to understand current efforts in place, plan for future efforts, and overall need that Hilton Head Island can support. Town and Chamber representatives work closely to understand the private initiatives on island that are, or have implemented, workforce housing for their employees. exp: The Sea Pines Resort Town works to identify grants and other funding opportunities to support affordable workforce housing efforts on island.
Work in partnership and enhance industry workforce development initiatives with the public sector, area schools, and industry partners.	Introduce new, formalized internship programs within the Lowcountry that include diverse offerings and hiring opportunities postintern ship. Work to enhance presence with TCL/ Culinary Institute/ USCB/ high school guidance counselors/ career fairs in an effort to build support for tourism and hospitality as a long-term viable career. Chamber's continued support of SC Apprentice Program, Chamber Junior and Senior Leadership programs that support the retention efforts regarding workforce and the tourism industry for this region.
Develop strategic understanding of requirements for hiring senior and strategic talent to support local businesses in their talent search.	Survey large, local hospitality businesses (The Sea Pines Resort etc.) and compile resourcing roadmap for required senior-level and strategic talent. Conduct salary analysis and competitive hiring practices in comparable communities. Understand and support collaborative efforts to ensure a competitive landscape on salaries, benefits and lifestyle opportunities.
Enhance and promote awareness of hospitality and cultural training programs in collaboration with local educational institutions and industry partners.	Establish a joint social media campaign between the Town and Chamber that speaks to the Live, Work, Play opportunities on Hilton Head Island. Create and promote a tourism & hospitality industry recruitment video.

TIMING



LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/Town		•		Successful launch of job portal.
Town/Private Partner		•		Establish relationships with local realtors / communities and work to pull in their listings and community detail to the site.
Town		•		The platform shows many different types of job options with a filter feature.
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Chamber		•		Relationship established between the Town, the Chamber, and the Committee.
Town/Private Partner/ Chamber		•		Town and Chamber have identified and established relationships with island partners.
Town/ Chamber		•		10% of funding opportunities identified to support overarching plan.
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Beaufort County/ Town/ Chamber		•		Social impressions and engagements
Beaufort County/ Town/ Chamber	•			
Chamber	•			Social impressions and engagements
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/Private Partner/ Chamber		•		Establish base understanding and create a Hilton Head Island senior-level recruitment handbook.
Town/Private Partner/ Chamber		•		Report on comparable towns/cities and their hiring efforts.
Town/Private Partner/ Chamber			•	Report out on partner offerings/ packages in efforts to establish competitive effort for recruitment.
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/Town		•		Create and implement program. Establish key metrics for measurement.
Chamber/Town		•		Confirm creation of video and plan to support promotion.

COMMUNITY CORNERSTONE PLAN (CONTINUED)

GOAL #3

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.

STRATEGY

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.

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

COMMUNITY CORNERSTONE PLAN (CONTINUED)

GOAL #4

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.

STRATEGY	TACTICS
Develop an arts, cultural & entertainment district with recreation and event facilities appropriately designed to fit our community and development aesthetic.	Bring the Parks and Rec Master Plan forward and learn about upcoming integration touchpoints and opportunities. Develop branding and marketing approach for an arts, cultural & entertainment district.
Partner with the Town of Hilton Head Island on building out a strategy for Island branding.	Collaborate with the Town of Hilton Head Island to create a cohesive branding strategy for the island.
Seek a 5-star property or resort designation to further elevate the Hilton Head Island brand in the luxury leisure and group marketplace.	Develop outreach plan and strategy for hospitality brands that align with Hilton Head Island's current offerings and existing corporate presence on-island. (For example, this initiative would be designed to plan and pitch Hilton Head Island to corporations such as Marriott to consider an Autograph Collection property on-island).
Evaluate current incentives for investment in new and existing venue capital to compete with other like-size coastal destinations.	Conduct competitive assessment to evaluate our destination compared to other like-minded destinations and competitive product offerings. Collaborate with our local and state representatives to inform, educate and influence decisions as it relates to capital investment and infrastructure funding. Work to develop holistic economic development strategy influenced by the 10-year destination management plan.

TIMING

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Chamber		•		Schedule time with the Town Staff/ Lead POC to walk through the Parks & Rec Plan.
Chamber/Town			•	Scope of work established that includes timing, assets and budget.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Chamber		•		Identify Town Staff POC and work with them to understand and determine the scope of work and budget for this project.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/Private Partner			•	Support the development/ redevelopment of a 5-star property.

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

COMMUNITY CORNERSTONE PLAN (CONTINUED)

GOAL #5

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.

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

TIMING



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

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

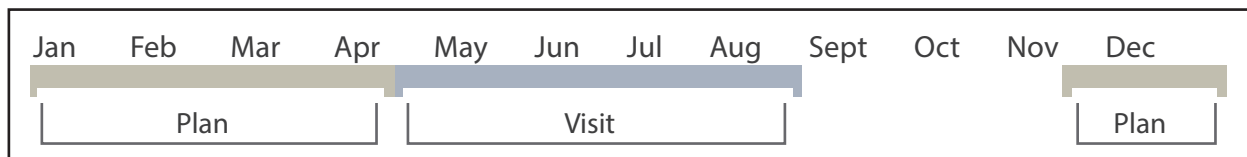
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Private Sector/ Chamber		•		Engage three rideshare partners.
Town/ Private Sector/ Chamber	•			RFP responses and successful bidding process.
Town/ Private Sector/ Chamber			•	Identification of ways to work alongside rideshare regulations and serve residents and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



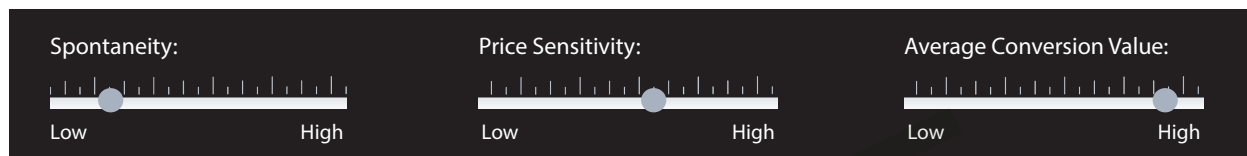
FAMILY

TRAVEL OBJECTIVE

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



FAMILY TRAVEL HABITS



WHO THEY ARE

★
Upscale & Status
Oriented

🏠
Values
Family Time

❤️
Creating a
Legacy

🍏
Active & Health
Conscious

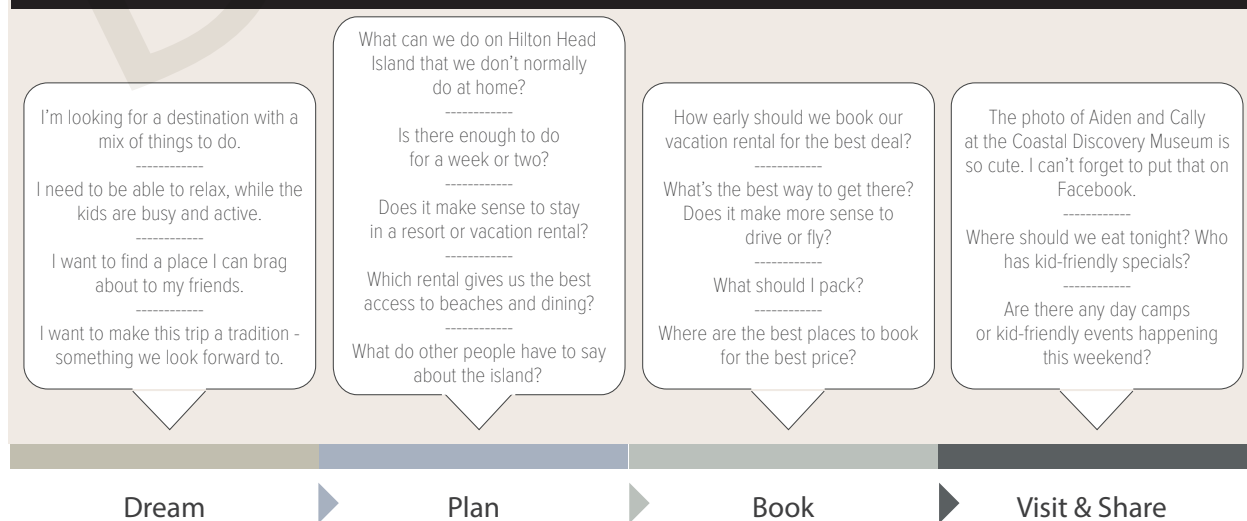
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
TV
Online Video
Forums & Blogs
Pinterest

"LET'S MAKE MEMORIES:" THEIR PATH TO PURCHASE

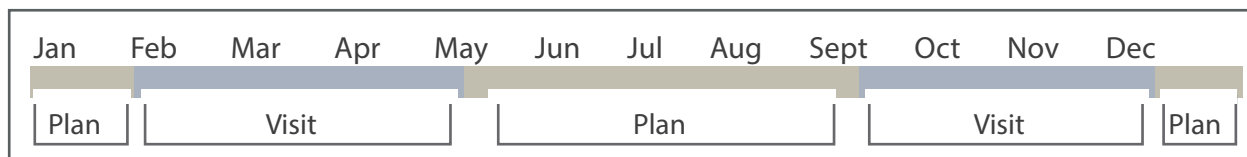




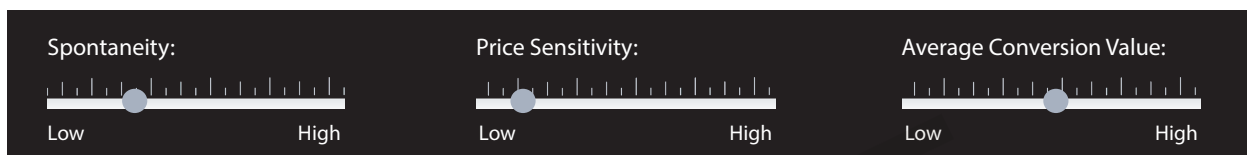
ARTS, HISTORY & CULTURE

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

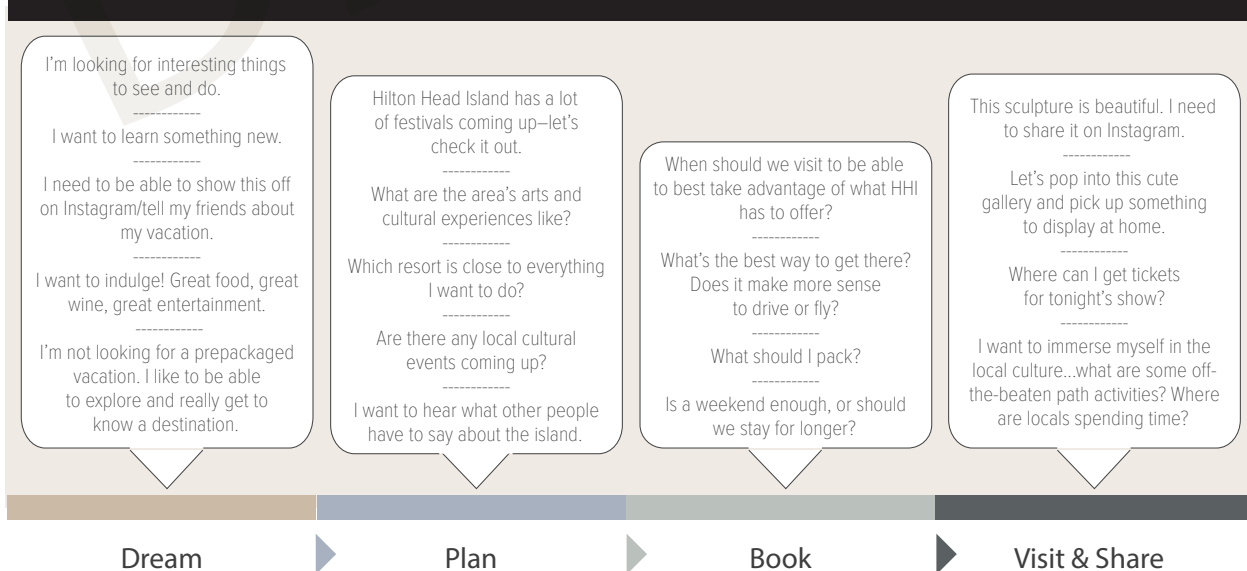
PREFERRED ACTIVITIES & ATTRACTIONS

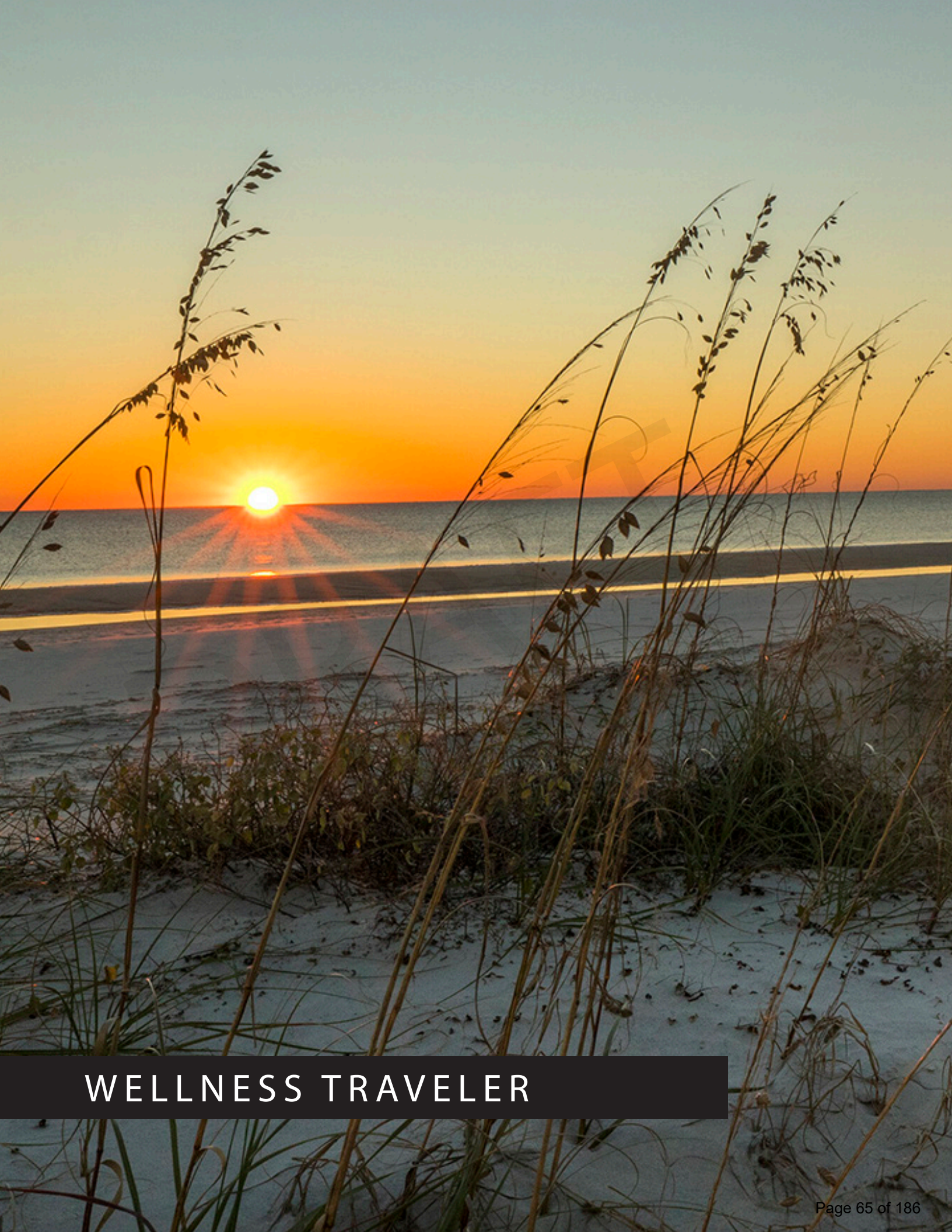
Historical Attractions
Art Galleries
Local Culture
Culinary Experiences
Festivals & Events
Theater
Music

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

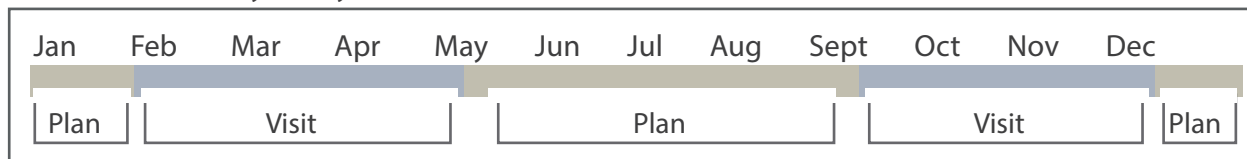




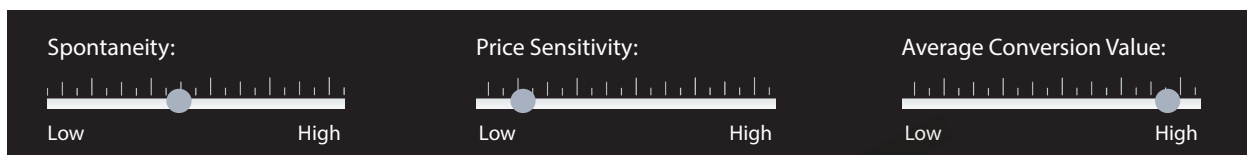
WELLNESS TRAVELER

TRAVEL OBJECTIVE

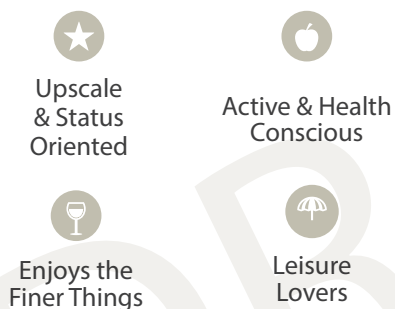
Find a getaway that will accommodate relaxation and rejuvenation, and allow them to prioritize their healthy lifestyle.



ARTS, HISTORY & CULTURE TRAVEL HABITS



WHO THEY ARE



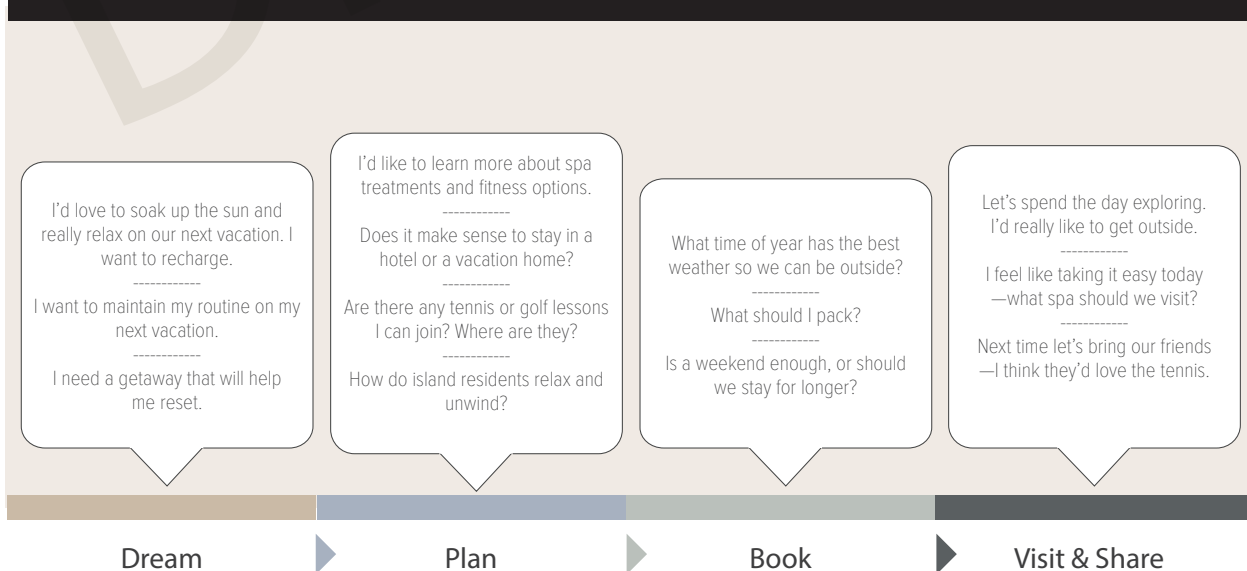
PREFERRED ACTIVITIES & ATTRACTIONS

Vacation Rentals & Resorts
Golf
Tennis & Pickleball
Biking
Spas

MARKETING CHANNELS & FORMATS

Facebook
Instagram
Forums & Blogs
TripAdvisor
Pinterest

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

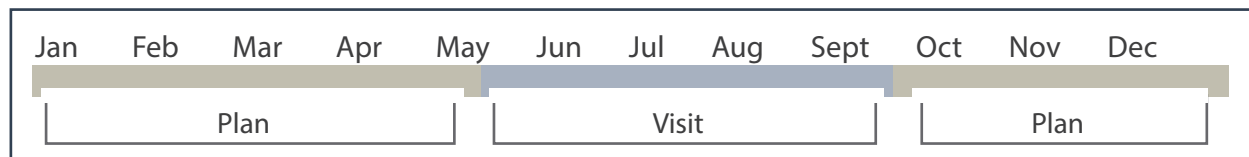




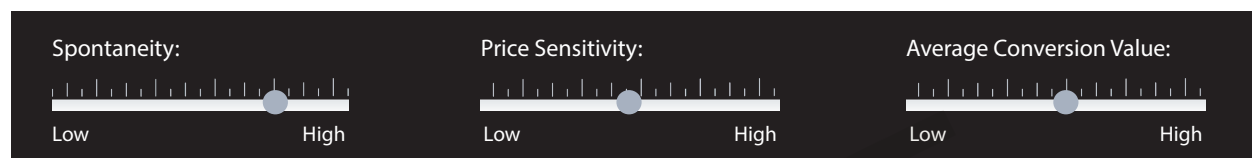
SPORTS ENTHUSIAST

TRAVEL OBJECTIVE

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



SPORTS ENTHUSIAST TRAVEL HABITS



WHO THEY ARE

Sports Fans
(Golf & Tennis)

Leisure Lovers

Spontaneous
& Social

Active & Health
Conscious

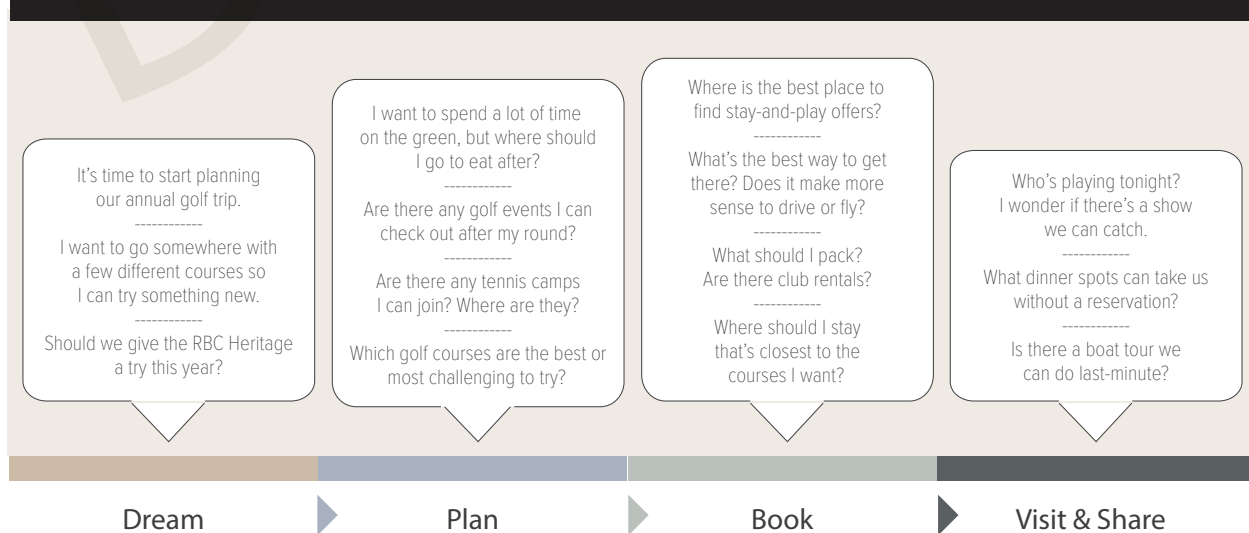
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
Twitter
TripAdvisor
TV
Online Video
Forums & Blogs

"LET'S EXPLORE." THEIR PATH TO PURCHASE

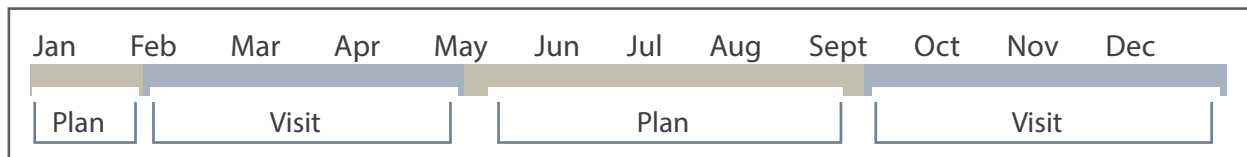




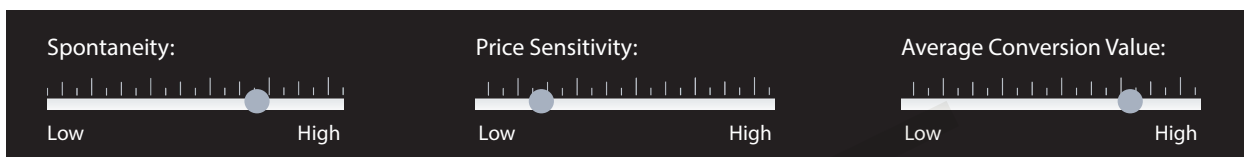
CULINARY

TRAVEL OBJECTIVE

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



CULINARY TRAVEL HABITS



WHO THEY ARE


Values
Authenticity


Seeking an
Immersive
Experience


Spontaneous
& Social


Unconventional

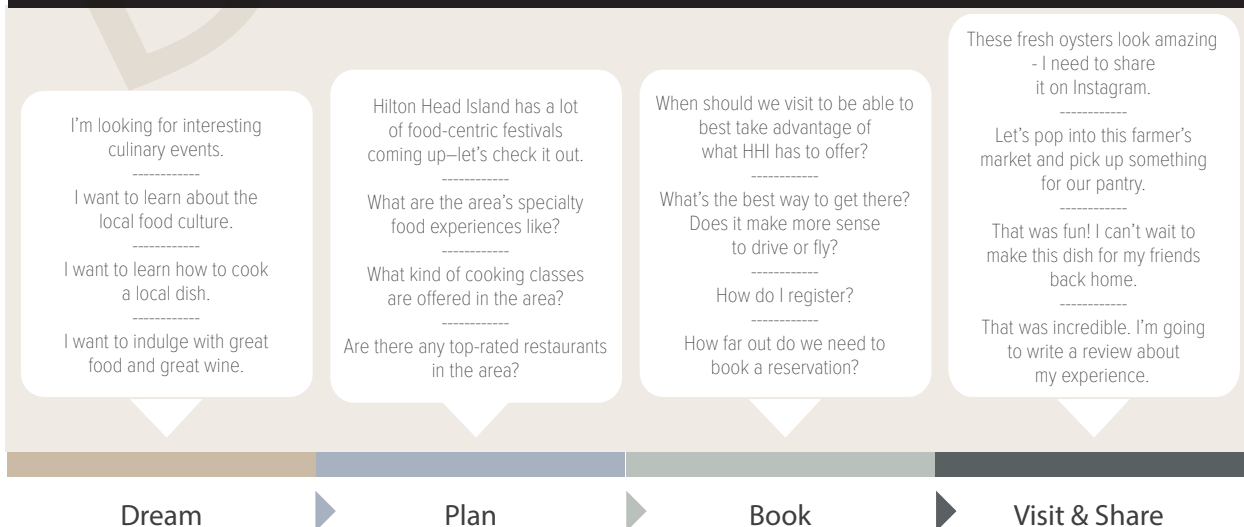
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
Forums & Blogs
Pinterest

"EXPERIENCE AUTHENTIC, LOCAL CUISINE." THEIR PATH TO PURCHASE





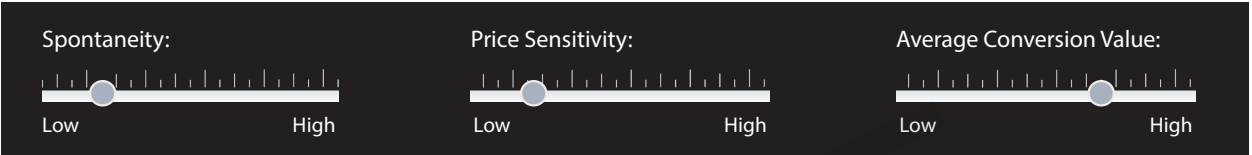
SNOWBIRDS

TRAVEL OBJECTIVE

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



SNOWBIRD TRAVEL HABITS



WHO THEY ARE

Icons and labels for traveler characteristics:

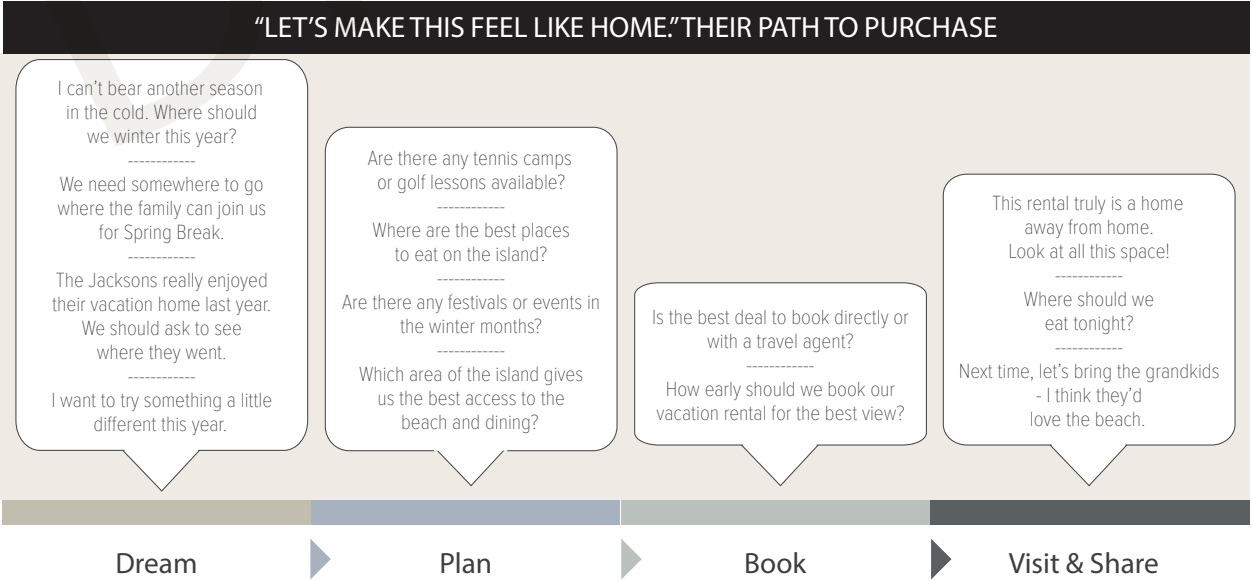
- Traditional (shell icon)
- Values Family Time (house icon)
- Enjoys the Finer Things (wine glass icon)
- Active & Health Conscious (apple icon)

PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

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

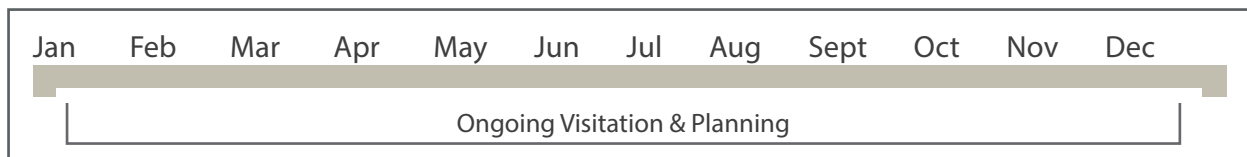




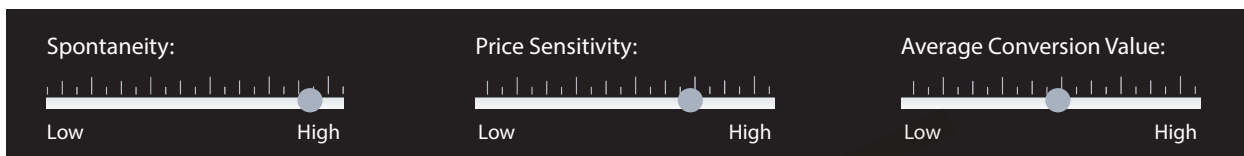
THE WEEKENDERS

TRAVEL OBJECTIVE

Find a fairweather weekend escape from work and city life.



THE WEEKENDERS TRAVEL HABITS



WHO THEY ARE

★
Upscale & Status
Oriented

🏠
Urban
Dwellers

💬
Spontaneous
& Social

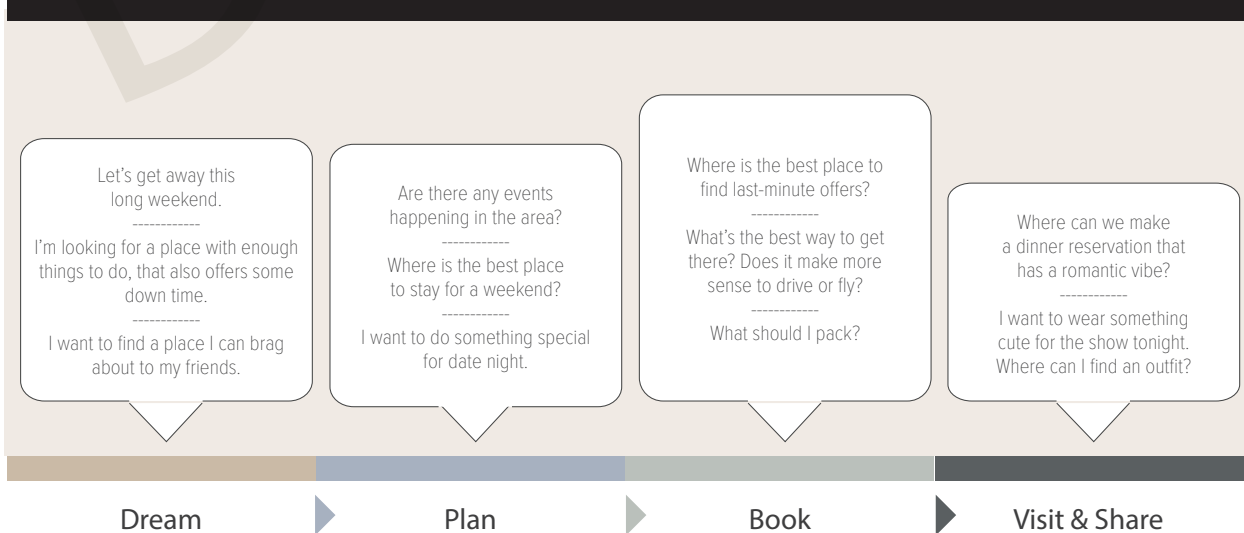
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
TV
Online Video
Forums & Blogs
Pinterest

"LET'S GET AWAY." THEIR PATH TO PURCHASE

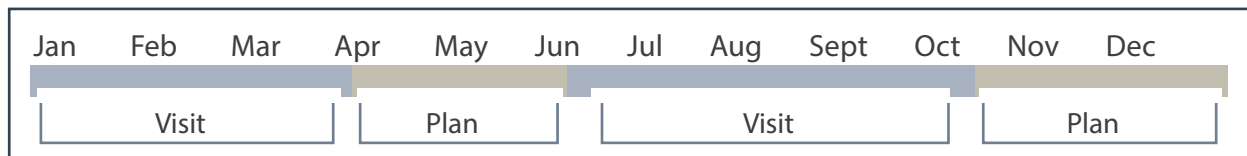




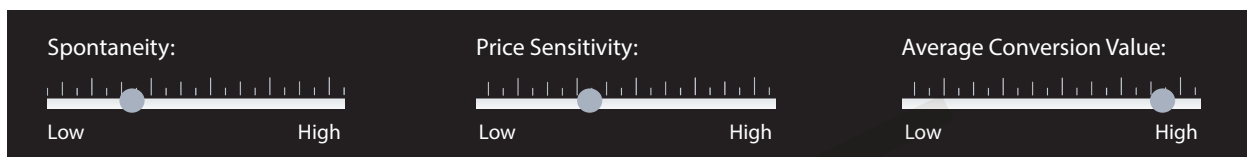
INTERNATIONAL VISITORS

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

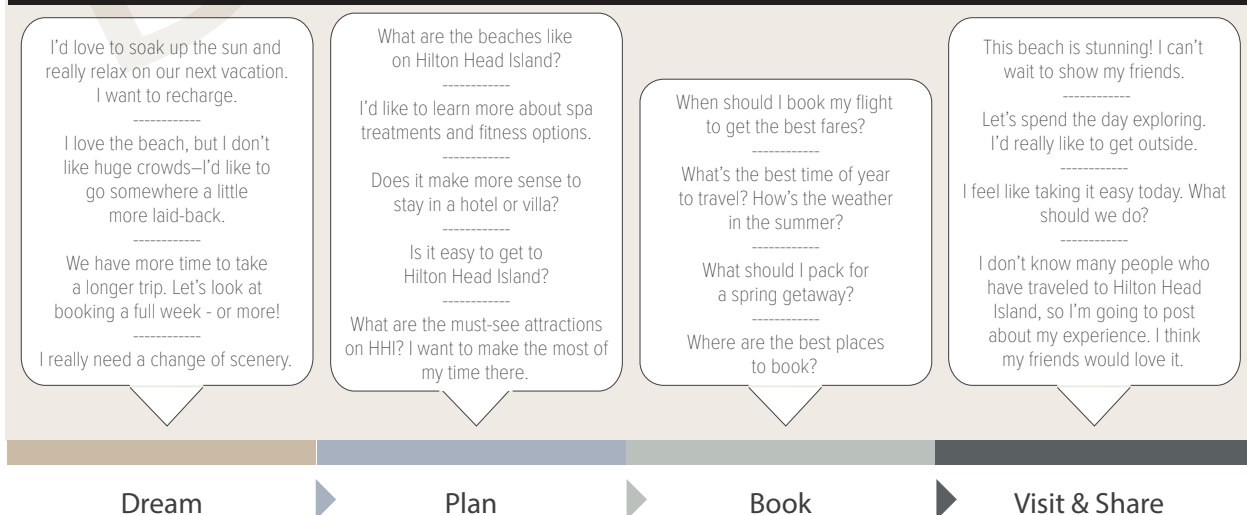
PREFERRED ACTIVITIES & ATTRACTIONS

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

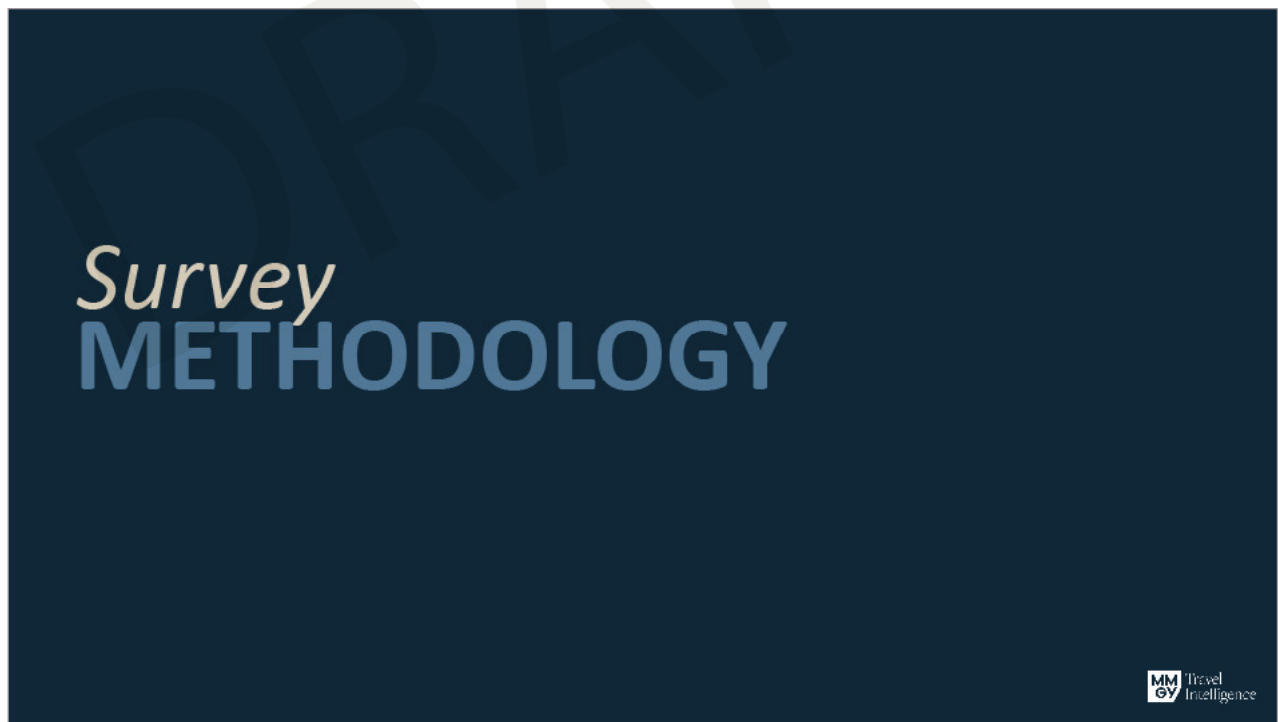
MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
TV
Online Video
Forums & Blogs
Pinterest

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



MMGY INTELLIGENCE
Community Sentiment Survey Executive Summary, Wave 3

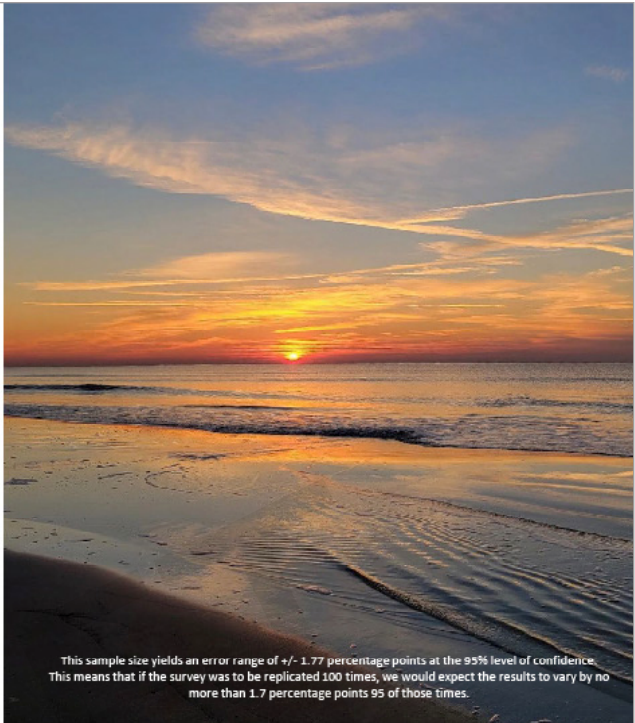


Survey Methodology

- MMGY Travel Intelligence conducted an online survey of 2,830 Hilton Head Island residents.
- Residents were invited to complete the online survey through the Chamber website, social media channels, and email outreach.
- The survey was fielded August 28, 2023 – September 17, 2023. Data were tabulated and analyzed by MMGY Travel Intelligence.
- The participants met the following criteria:
 - / Must be a resident or property owner of Hilton Head Island;
 - / 18 years of age or older.

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

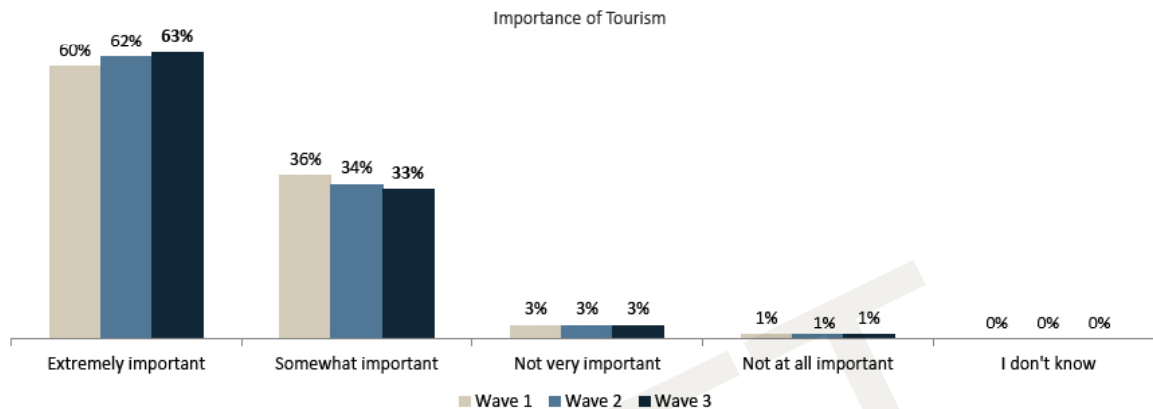
Throughout this report, data in **bold** indicates a significant difference.



Key INSIGHT #1

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

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



Key Insight #1

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

MMGY Travel Intelligence

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

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Extremely important	70%	60%	59%	61%
Somewhat important	27%	36%	36%	34%
Not very important	2%	3%	4%	4%
Not at all important	0%	1%	1%	1%
I don't know	0%	0%	0%	0%

Key Insight #1

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

MMGY Travel Intelligence

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

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

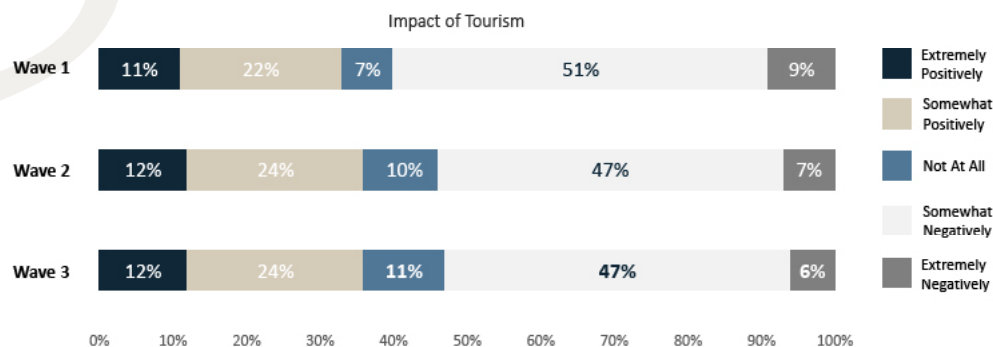
Key Insight #1

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



-7-

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



Key Insight #1

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



-8-

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

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Extremely positively	15%	9%	9%	13%
Somewhat positively	28%	24%	21%	23%
Not at all	14%	9%	11%	8%
Somewhat negatively	41%	52%	52%	48%
Extremely negatively	3%	6%	7%	9%

Key Insight #1

- 9 -

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



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

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

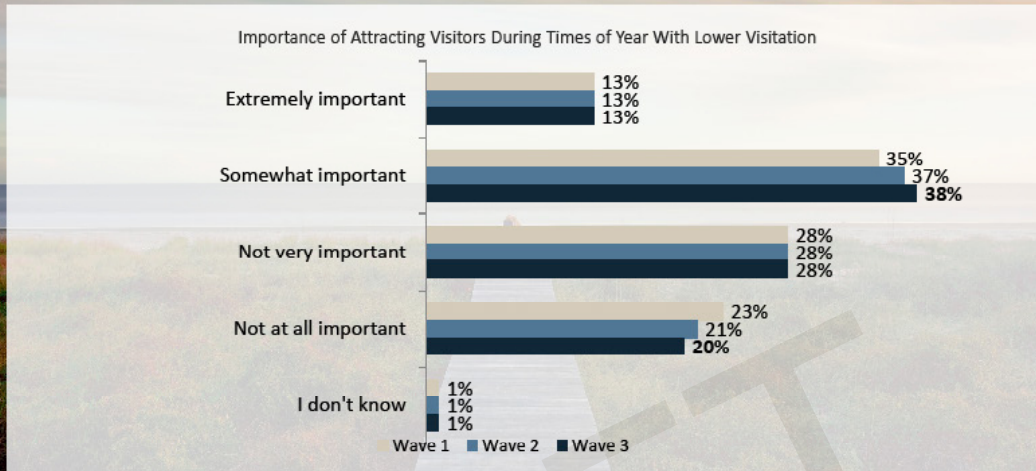
Key Insight #1

- 10 -

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



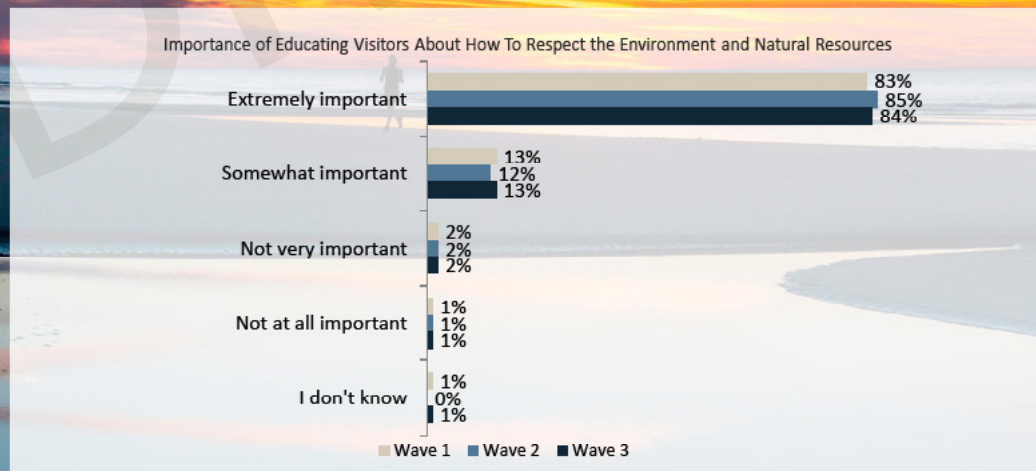
Half of residents believe that it is important to attract visitors during times of the year with lower visitation, up slightly from Wave 1.



Key Insight #1

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

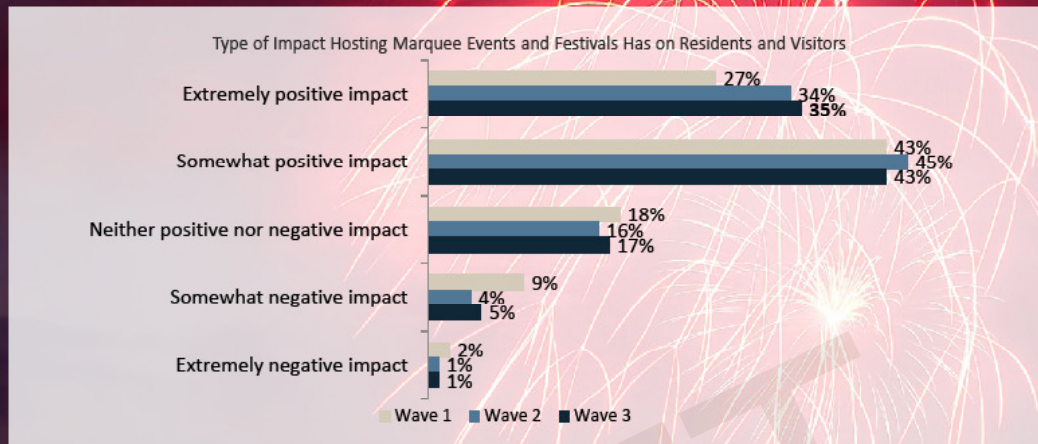
Nearly all residents believe it is important to educate visitors about how to respect the environment and natural resources when they visit, unchanged from previous waves.



Key Insight #1

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

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



Key Insight #1

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

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

	Wave 1	Wave 2	Wave 3
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in educating visitors about how to be responsible in protecting and preserving our natural resources when visiting Hilton Head Island	87%	87%	87%
I support efforts by our town in the funding and installation of local public art, exhibits, and cultural attractions	67%	70%	70%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in promoting attractions, festivals, exhibits and similar on Hilton Head Island	57%	67%	67%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in branding and marketing Hilton Head Island for tourism	47%	51%	50%

Key Insight #1

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





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

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

Positive: Tourism on Hilton Head Island...

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

Negative: Tourism on Hilton Head Island...

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

Key Insight #2

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

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

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

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

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



Key Insight #2

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

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

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

Positive Statements (% Agree) – Bottom 4	Wave 1	Wave 2	Wave 3
Reduces taxes for residents (ex. property taxes, county and city sales taxes, school taxes etc.)	51%	55%	56% ▲
Covers the cost of beach renourishment	50%	53%	54% ▲
Is an important factor in making our community a great place to live	39%	45%	46% ▲
Helps create a positive ambiance/vibe in the local community	33%	37%	38% ▲

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



Key Insight #2

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

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

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

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

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



Key Insight #2

Tourism on Hilton Head Island...

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

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



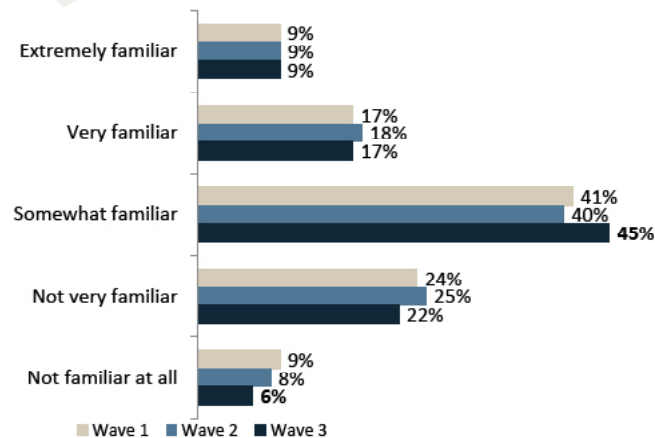
Key Insight #2

Key INSIGHT #3

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

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

Familiarity with the Hilton Head Island-Bluffton Chamber of Commerce



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

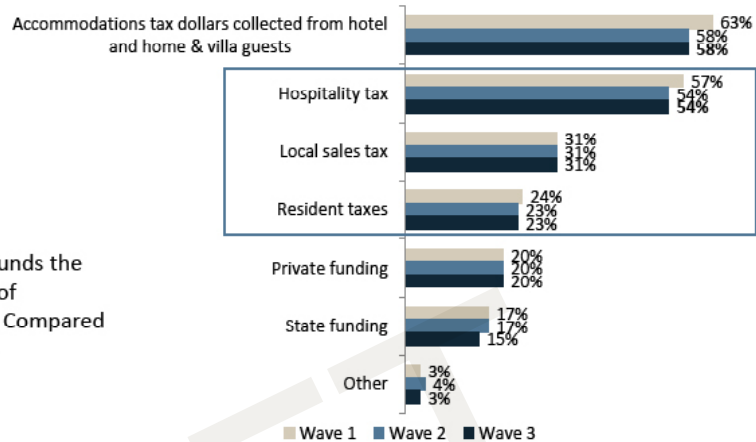
MMGY Travel Intelligence

Key Insight #3

Hilton Head Island-Bluffton Chamber of Commerce Funding

74%
Wave 3

of residents believe they know what funds the Hilton Head Island-Bluffton Chamber of Commerce tourism marketing efforts. Compared to 76% in Wave 1 and 74% in Wave 2.



Key Insight #3

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

MMGY Travel Intelligence

Resources Provided to Family and Friends When Visiting.

34%
Wave 3

of residents provide resources to family and friends for trip planning when visiting Hilton Head Island. Compared to 29% in Wave 1 and 34% in Wave 2



Key Insight #3

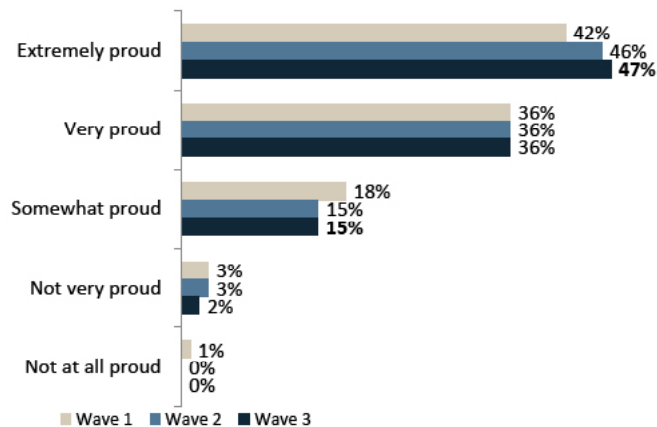
Question: When you are expecting out of town family or friends to visit you on Hilton Head Island, do you provide them with links to webpages and resources for their trip planning? / Which webpages and resources do you provide?

MMGY Travel Intelligence

Key INSIGHT #4

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

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



Key Insight #4

- 27 -

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

MMGY Travel Intelligence

Those who have lived here less than 5 years are more likely to be extremely proud in their residency than those who have lived here longer.

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Extremely proud	56%	42%	39%	46%
Very proud	34%	37%	40%	34%
Somewhat proud	8%	19%	17%	17%
Not very proud	1%	2%	4%	2%
Not at all proud	1%	1%	0%	1%

Key Insight #4

- 28 -

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



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

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

Key Insight #4

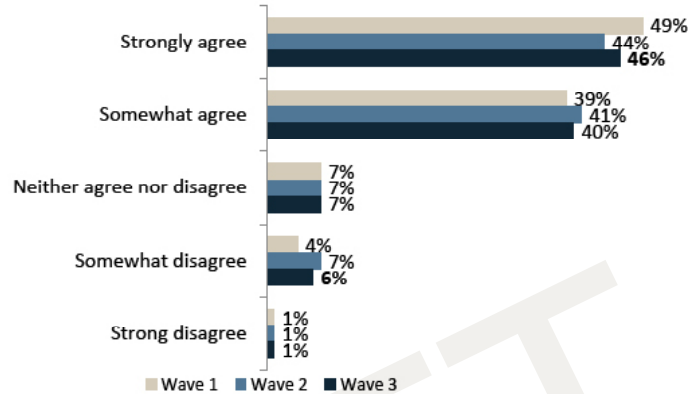
- 29 -

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



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

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



Key Insight #4

- 30 -

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

MMGY Travel Intelligence

Perceived Quality of Hilton Head Island Experiences

Top 2 Box	Wave 1	Wave 2	Wave 3
Beaches	91%	92%	92%
Golf courses	91%	91%	92%
Leisure pathways and bike trails	86%	86%	87%
Outdoor/nature activities	80%	82%	82%
Savannah/Hilton Head International Airport	79%	80%	82%
Outdoor public spaces for festivals and events	69%	77%	81%
Water sports/activities	77%	79%	79%
Community parks	70%	77%	78%
Surface street bike paths	70%	70%	72%
Hilton Head Island Airport	55%	57%	58%
Retail shopping	49%	54%	52%
Road quality	42%	44%	51%
Playing fields for sports leagues, tournaments and competitions	44%	48%	50%
Museums/Cultural attractions	38%	43%	47%
Public pools/aquatic centers	27%	32%	31%
Indoor facilities for sports leagues, tournaments and competitions	18%	22%	23%

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

Key Insight #4

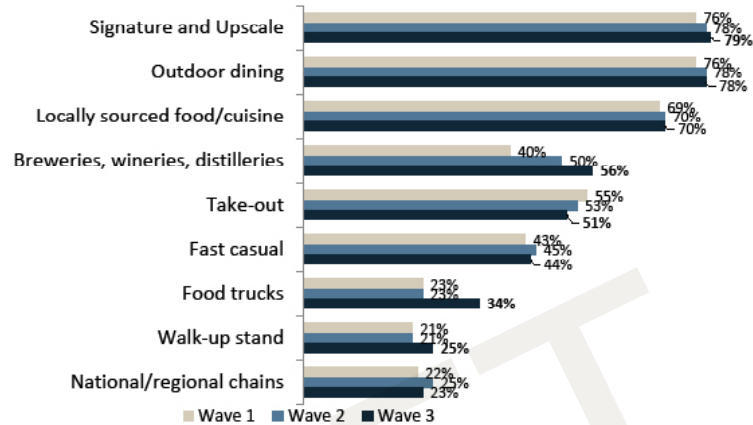
- 31 -

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

MMGY Travel Intelligence

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

Dining Options in Hilton Head Island Perceived To Be High Quality



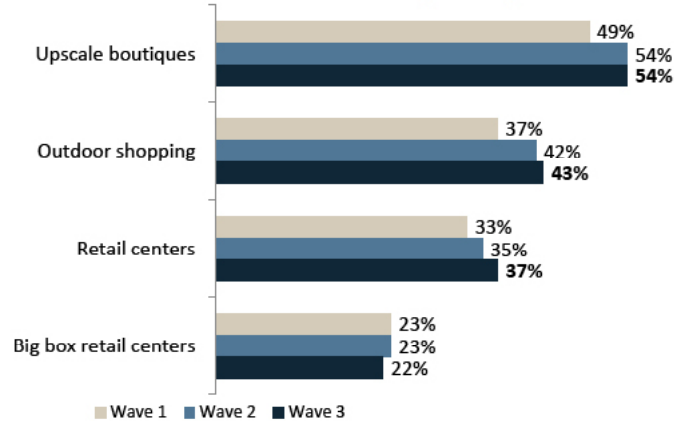
Key Insight #4

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

MMGY Travel Intelligence

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

Shopping Options in Hilton Head Island Perceived To Be High Quality



Key Insight #4

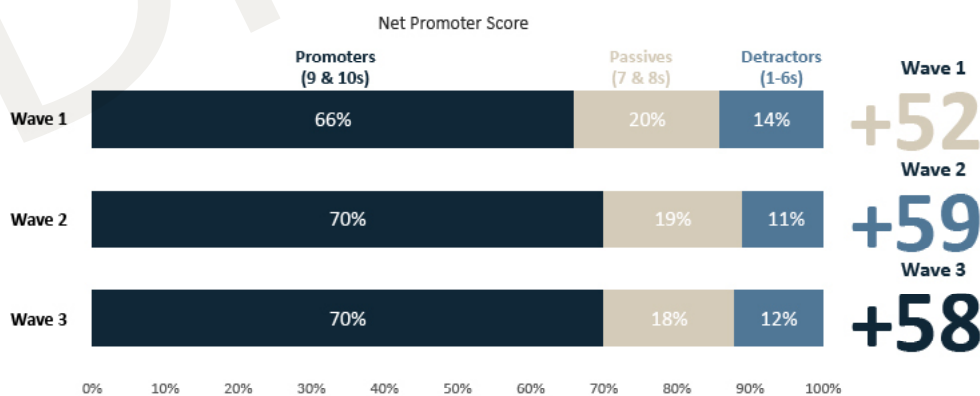
Question: Please indicate your perception of the quality of each of the following categories of shopping on Hilton Head Island.

MMGY Travel Intelligence

Key INSIGHT #5

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

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



Question: On a scale from 1-10, where 1 = Not Likely at All and 10 = Extremely Likely, how likely are you to recommend Hilton Head Island as a place to visit when talking to trusted friends and family members who do not live on Hilton Head Island?

Key Insight #5

MMGY Travel Intelligence

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

By Length of Residency	Less than 5 years	5–10 years	11–20 years	More than 20 years
Promoters (9+10s)	79%	69%	67%	63%
Passives (7+8s)	15%	19%	20%	20%
Detractors (1-6s)	6%	12%	13%	17%
NPS	+73	+57	+54	+46

Key Insight #5

/ **Question:** On a scale from 1-10, where 1 = Not Likely at All and 10 = Extremely Likely, how likely are you to recommend Hilton Head Island as a place to visit when talking to trusted friends and family members who do not live on Hilton Head Island?



- 36 -

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

By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Promoters (9+10s)	65%	82%	69%
Passives (7+8s)	21%	11%	19%
Detractors (1-6s)	14%	7%	12%
NPS	+51	+71	+57

Key Insight #5

/ **Question:** On a scale from 1-10, where 1 = Not Likely at All and 10 = Extremely Likely, how likely are you to recommend Hilton Head Island as a place to visit when talking to trusted friends and family members who do not live on Hilton Head Island?



- 37 -

83%
Wave 3

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

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

Negative Aspects to Tourism on Hilton Head Island

Overcrowding

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

Overdevelopment

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

Quality of Visitor

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

Rising Prices

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

Key Insight #5



Top Concerns Facing The Community

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

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

Key Insight #5

This question was not asked in Wave 1 so comparisons have been made to Wave 2.

-41- / **Question:** What are your top three concerns facing our community?



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

Host more arts, festivals and cultural events.

Stay true to its character.

Bring in more dining and shopping options.

Continue preservation and protection efforts.

Provide more workforce housing.

Continue to develop family-friendly offerings.

Modernize the airport and offer more direct flights.

Have stricter controls on rental properties.

Ease traffic flow.

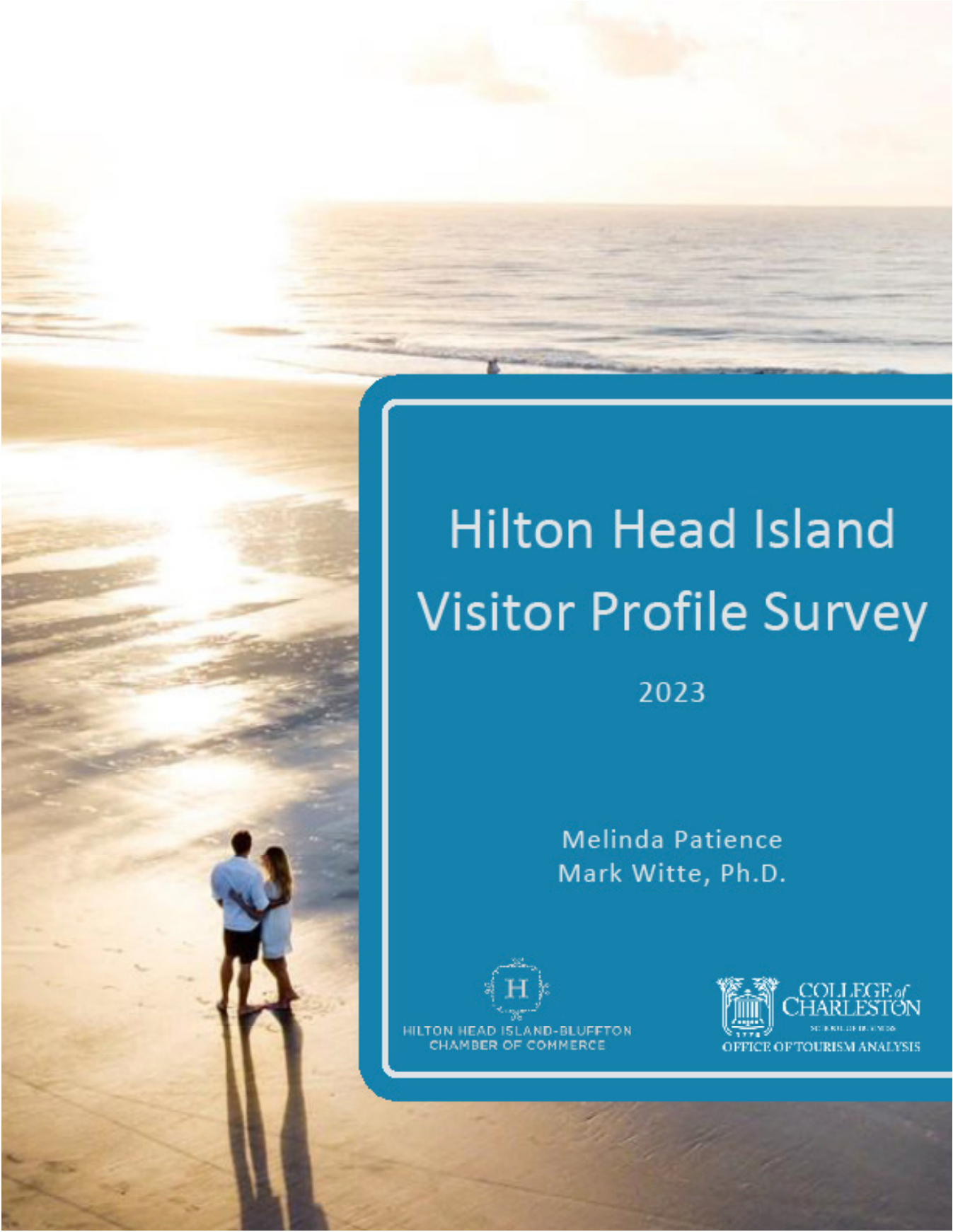
Advertise to a higher income traveler.

Key Insight #5

MMGY Travel Intelligence



OFFICE OF TOURISM ANALYSIS,
COLLEGE OF CHARLESTON
2023 Visitor Profile Study



Hilton Head Island Visitor Profile Survey

2023

Melinda Patience
Mark Witte, Ph.D.



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



COLLEGE of
CHARLESTON

OFFICE OF TOURISM ANALYSIS

**PREPARED FOR:
HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE**

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1

EXECUTIVE SUMMARY**SAMPLE DEMOGRAPHICS**

Millennials represented 61% of the respondents, followed by Gen X (17.7%), and then Baby Boomers (17.9%). Over 56% of those surveyed had a Bachelor's degree or higher, and more than 57% had an annual household income of \$100,000 or more per year. Also, nearly 90% of the respondents were married.

POINT OF ORIGIN

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

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

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

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

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

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

TRIP CHARACTERISTICS

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

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

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

**TRAVEL PLANNING**

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

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

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

Of those visitors surveyed, 80.2% indicated an intention to return to visit Hilton Head Island, which signals a high degree of trip satisfaction.

NON-VISITORS

Of those who indicated not to have traveled at all or not to have traveled to the Hilton Head Island / Bluffton area in the past 12 months (N=169), 33.7% had never visited the Hilton Head Island / Bluffton area before, and 50.3% had visited one to five times before.

Of those non-visitors, 47.0% traveled elsewhere, 26.0% plan to visit in the future, 4.0% were hesitant because of unpredictable weather events, 3.0% mentioned health reasons, 2.0% did not find what they were looking for, and 2.0% did not travel at all. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (42.0%) and South (27.0%) were the most popular. Nonetheless, 48.8% of the non-visitors indicated they had plans to visit the Hilton Head Island / Bluffton area within one year.

TRAVEL BEHAVIOR

Looking at the travel behavior of both visitors and non-visitors together, the majority (50.6%) take two to four leisure/vacation trips per year, and they are most likely to travel between May and October. The top five most appealing experiences for leisure trips/vacations were: relaxation & rejuvenation (72.2%), beaches (71.2%), passive outdoor adventures (63.7%), historic attractions (61.9%), and romantic couple getaways (60.8%).

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



METHODOLOGY

The 2022 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2022 and January 2023, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited www.hiltonheadisland.org or www.visitbluffton.org and submitted their email addresses, and they were contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted multiple times during the same time period on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,918 completed surveys were collected. This report is based largely on the 1,913 respondents who visited Hilton Head Island as an overnight or day trip, along with individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton.

This report presents the results of the present study, together with comparative results from the last two times this study was completed, examining visitation in 2019 and 2021. When 2019 data is not presented, it is because the question was not asked in that survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2021, and 2022. The estimates are based on secondary data for hotel, timeshare, and villa visitors, as well as primary data collected regarding second homeowners, their guests, and day trippers.

Visitor Segment	2021	2022	Change (%)
Villa/Home Rentals	962,686	951,126	-1.2%
Hotels/Resorts	508,977	497,574	-2.2%
Timeshares	481,934	481,461	-0.1%
Second Homeowners	719,302	710,673	-1.2%
Non-paying Guests	186,667	184,428	-1.2%
Day trippers	267,290	264,083	-1.2%
Total Visitors	3,126,856	3,089,345	-1.2%

Table 1: Visitor Estimates for 2021 and 2022



SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021	2022	2023
Gender				
Female	67.4%	62.5%	49.8%	54.1%
Male	32.6%	37.4%	51.1%	45.7%
Self-identify	-	0.1%	-	0.3%
Marital Status				
Married	76.7%	76.7%	77.3%	86.4%
Single	8.5%	9.2%	9.9%	6.7%
Divorced	7.4%	7.7%	5.8%	3.4%
Living as Married	3.8%	-	-	-
Widowed	3.1%	5.3%	5.9%	2.8%
Separated	0.5%	1.1%	1.1%	0.7%
Education (highest level completed)				
Grade School	0.2%	0.7%	0.4%	0.9%
High School	8.0%	8.0%	6.5%	3.8%
Some College	19.6%	20.9%	21.5%	22.6%
Associates Degree (2 years)	13.1%	13.6%	13.2%	16.0%
Bachelor's Degree (4 years)	31.5%	32.9%	32.3%	33.0%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%
Age				
19 years or younger	0.1%	0.1%	0.1%	0.3%
20 to 29 years	0.9%	10.5%	23.8%	24.1%
30 to 39 years	5.9%	16.5%	28.8%	39.4%
40 to 49 years	15.3%	12.6%	13.1%	8.3%
50 to 59 years	26.8%	18.7%	10.9%	9.4%
60 to 69 years	34.4%	25.8%	14.2%	11.6%
70 years and over	15.9%	14.5%	8.6%	6.3%
Not Applicable	0.6%	1.4%	0.3%	0.5%
Household Income				
Under \$24,999	1.4%	2.3%	1.5%	1.1%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%
Not Applicable	18.8%	-	-	-
N	1,682	1,884	1,913	1,154

Table 2: Demographics

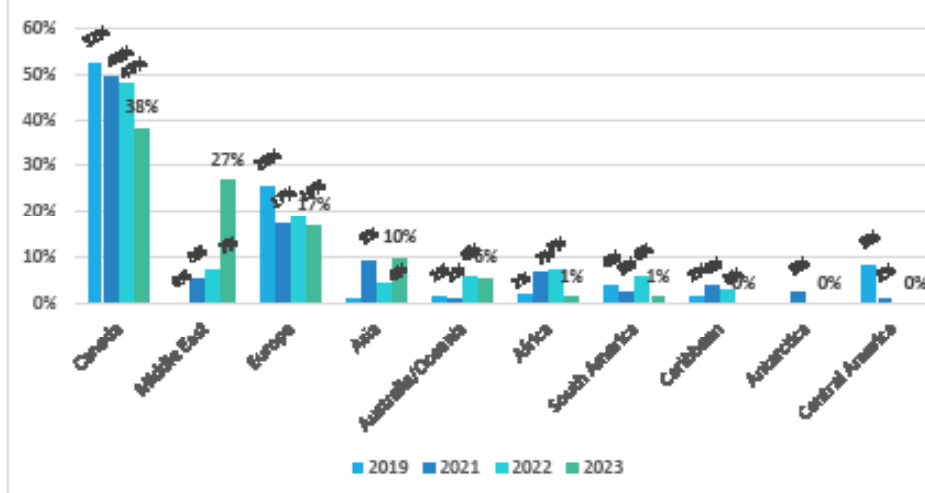
SAMPLE POINT OF ORIGIN**ZIP Code Analysis – Top 30 MSAs**

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

Table 3: ZIP Code Analysis – Top 30 MSAs

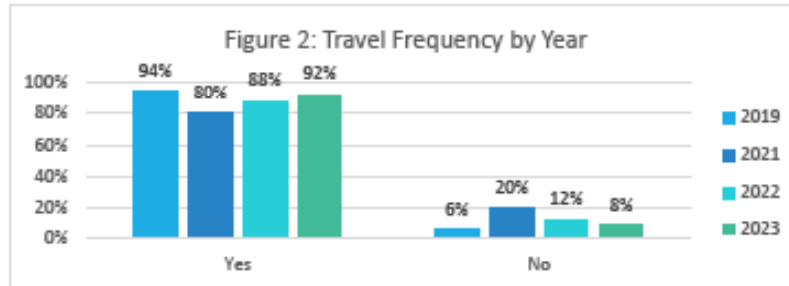
International Markets

Figure 1: International Markets by Year

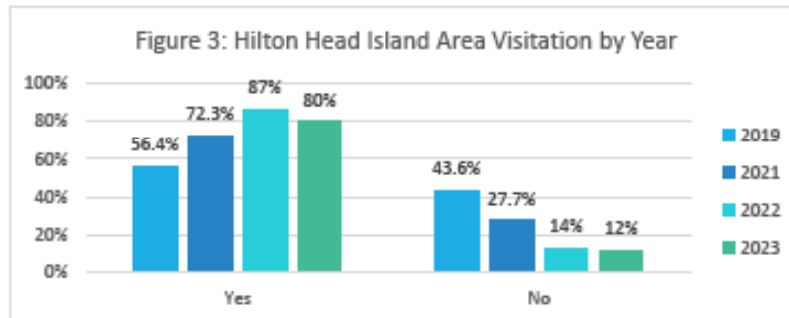


	2019	2021	2022	2023
Canada	52.1%	49.3%	47.8%	38.0%
Middle East	0.0%	5.3%	7.2%	26.8%
Europe	25.4%	17.3%	18.8%	16.9%
Asia	1.0%	9.3%	4.3%	9.9%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%
Africa	2.1%	6.7%	7.2%	1.4%
South America	4.2%	2.7%	5.8%	1.4%
Caribbean	1.4%	4.0%	2.9%	-
Antarctica	-	2.7%	-	-
Central America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

Table 4: International Markets by Year

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA**Within the last 12 months have you traveled or taken a vacation?¹**

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

TABLE 5: Travel Frequency by Year**Did you visit Hilton Head Island, SC or Bluffton, SC in the last 12 months?¹**

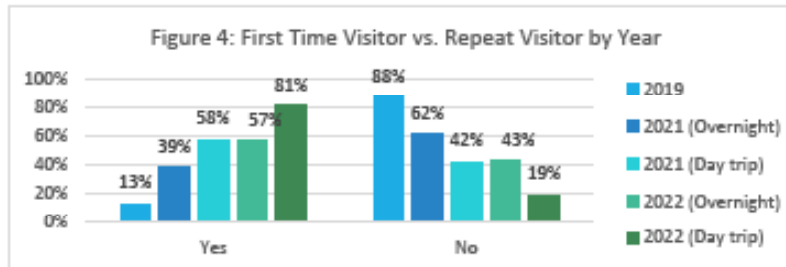
	2019	2021	2022	2023
Yes	56.4%	72.3%	86.5%	79.8%
No	43.6%	27.7%	13.5%	12.0%
N	1,713	1,675	2,547	1,570

TABLE 6: 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 2021 and 2022 it was just asked of those who had travelled.

HILTON HEAD ISLAND VISITORS

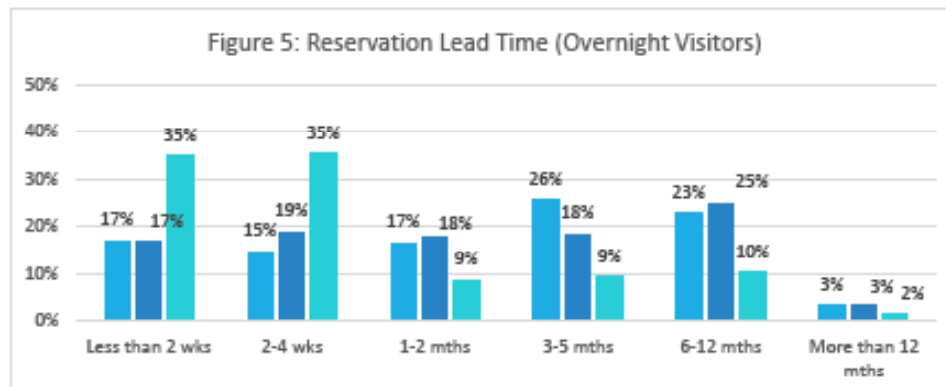
Was that your first time visiting Hilton Head Island?



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

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

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



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

TABLE 8: Reservation Lead Time

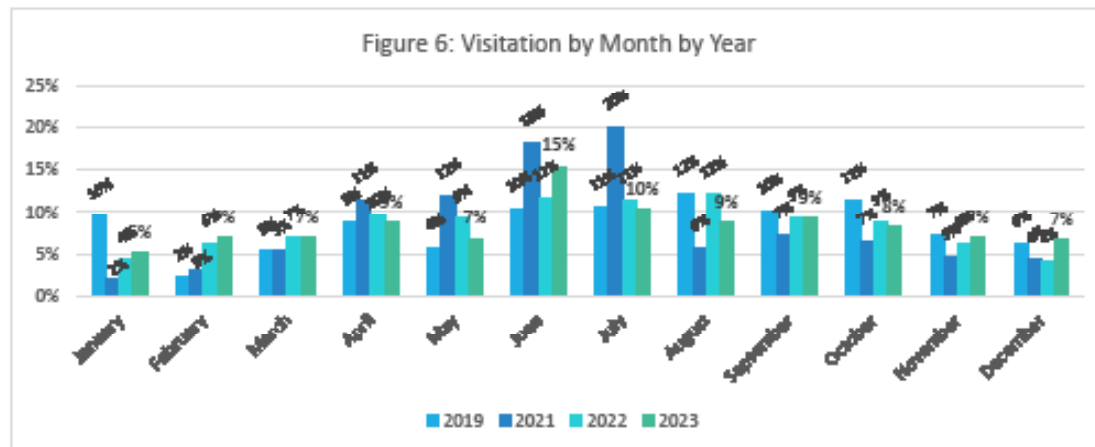
When did you make your most recent trip to Hilton Head Island?

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

TABLE 9: Visitation Year by Year

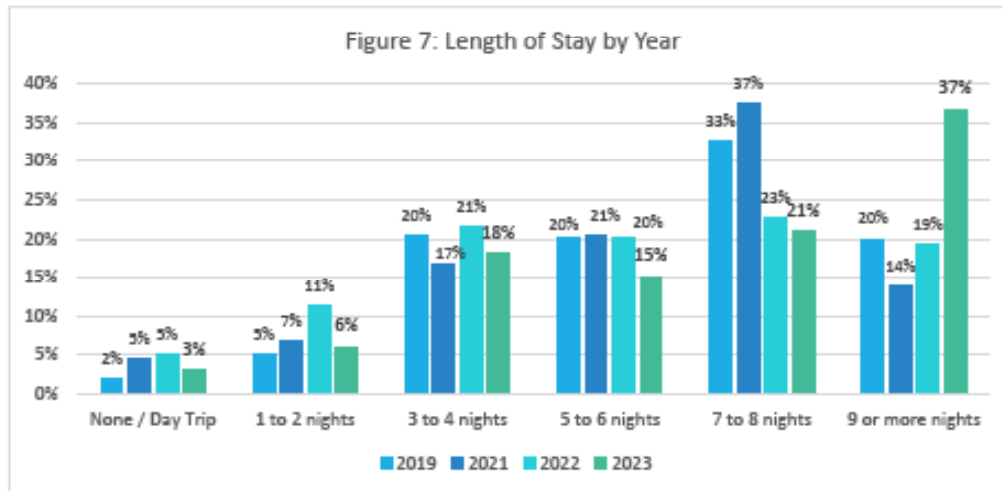
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
January	9.5%	1.9%	0.0%	4.3%	4.3%	5.1%	3.0%
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	0.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%
November	7.2%	4.7%	0.0%	6.3%	2.9%	6.9%	0.0%
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%
N	951	1,504	34	1,361	70	1,044	33

TABLE 10: Visitation by Month by Year



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

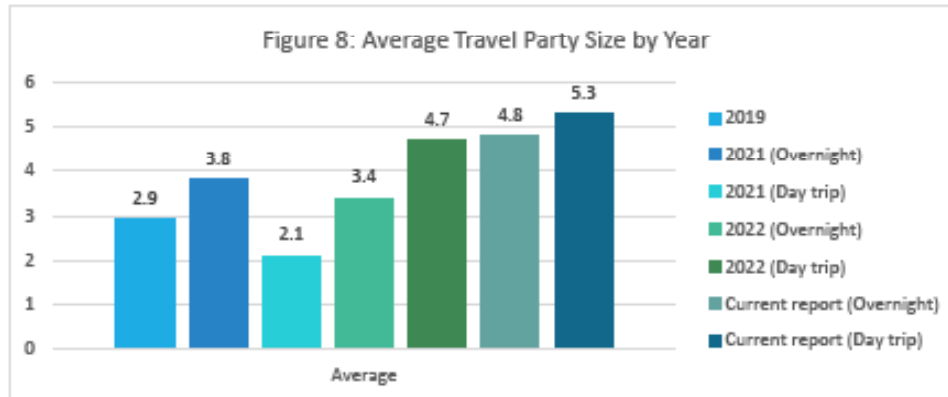
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023
None/day trip only	2.0%	4.5%	5.2%	3.1%
1 night	1.5%	1.8%	2.4%	0.4%
2 nights	3.1%	4.9%	8.9%	5.6%
3 nights	10.3%	7.5%	11.3%	10.2%
4 nights	10.0%	9.3%	10.2%	7.9%
5 nights	7.7%	9.6%	10.5%	7.5%
6 nights	12.4%	10.9%	9.5%	7.6%
7 nights	30.4%	34.0%	19.3%	15.4%
8 nights	2.1%	3.4%	3.4%	5.5%
9 nights	2.3%	2.6%	1.8%	3.7%
10 nights	3.4%	3.1%	3.2%	3.7%
11 nights	0.5%	0.4%	1.3%	2.6%
12 nights	0.8%	0.9%	1.4%	3.7%
13 nights	0.6%	0.7%	0.8%	2.9%
14 nights	4.8%	4.2%	3.6%	4.4%
15 nights	0.5%	0.8%	1.1%	2.9%
More than 15 nights	7.1%	1.1%	6.2%	12.8%
N	950	996	1,519	1,103

TABLE 11: Length of Stay by Year

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



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

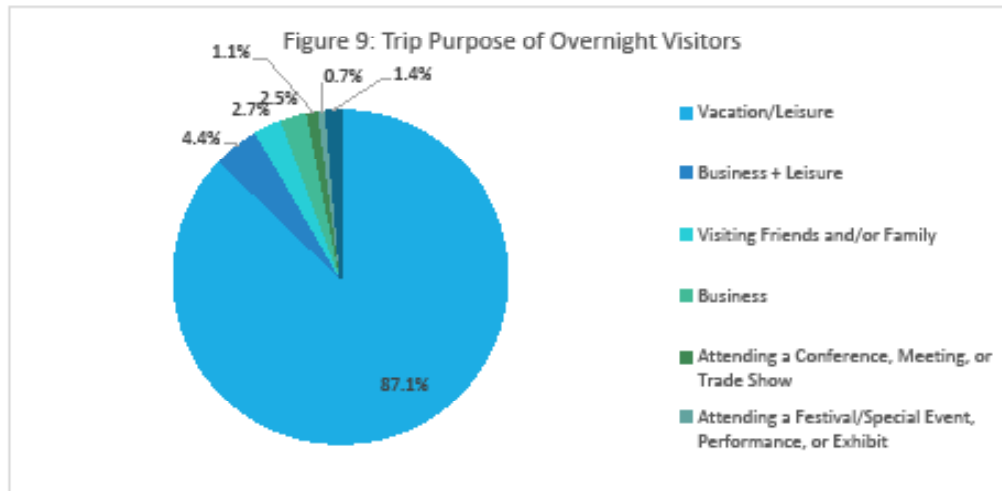
TABLE 12: Travel Party Size by Year

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

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	35.3%	25.6%	20.0%	15.7%	1.1%	0.5%	1.7%
	18-24	25.8%	6.9%	3.4%	1.1%	0.1%	0.1%	2.5%
	25-34	35.3%	6.5%	16.8%	13.0%	11.7%	13.6%	2.9%
	35-44	35.3%	21.5%	21.3%	17.9%	0.6%	0.6%	2.8%
	45-54	86.8%	5.6%	5.0%	0.6%	0.1%	0.2%	1.8%
	55-64	84.4%	7.7%	5.3%	0.4%	0.6%	0.1%	1.7%
	65+	83.3%	5.4%	9.2%	0.6%	-	0.2%	2.4%
Day Trip	Under 18	64.7%	14.7%	14.7%	-	-	2.9%	2.9%
	18-24	67.6%	14.7%	5.9%	-	-	5.9%	5.9%
	25-34	44.1%	14.7%	8.8%	5.9%	5.9%	5.9%	14.7%
	35-44	64.7%	14.7%	8.8%	-	2.9%	2.9%	5.9%
	45-54	79.4%	11.8%	5.9%	2.9%	-	-	-
	55-64	79.4%	5.9%	2.9%	2.9%	-	2.9%	5.9%
	65+	82.4%	11.8%	5.9%	-	-	-	-

TABLE 13: Travel Party Ages by Year

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



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

TABLE 14: Trip Purpose of Overnight Visitors

Day Trip Visitors:

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

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

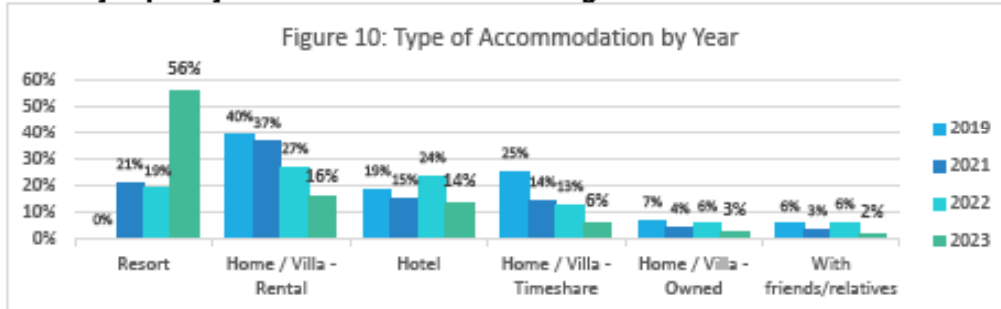
TABLE 15: Day Trip as Part of a Vacation or Day Trip from Home

Where did you stay overnight?

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

TABLE 16: Day Trip Visitors' Overnight Location

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

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

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

TABLE 17: Types of Accommodation by Year**What was the name of the Hotel/Resort where you stayed?**

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

TABLE 18: Top 10 Hotels or Resorts**Which of the following online platforms did you use to make your home/villa reservation?**

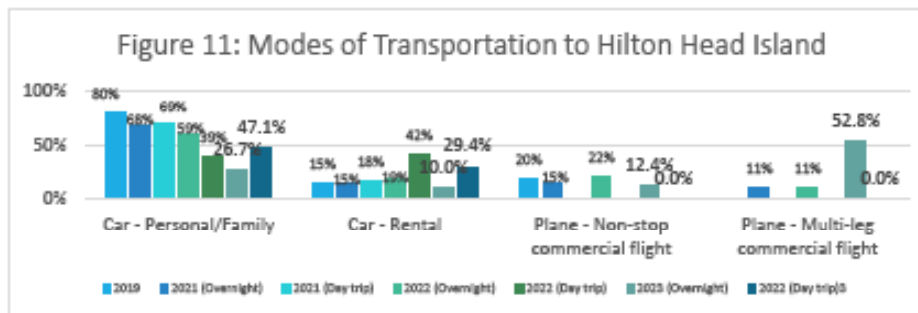
	2019	2021	2022	2023
Directly with owner	-	6.2%	6.0%	-
Vrbo	32.8%	34.2%	29.2%	32.3%
A Local vacation rental company	22.7%	22.9%	24.7%	22.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%
Airbnb	2.4%	10.0%	12.0%	10.2%
Vacasa	-	4.9%	5.5%	6.6%
HomeAway	-	2.2%	3.5%	4.2%
TurnKey	-	1.3%	-	3.0%
I don't remember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

TABLE 19: Booking Platforms for Home/Villa Rental

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

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Car - Personal/Family	79.5%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%
Car - Rental	14.7%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%
Plane - Non-stop commercial flight	19.5% ⁴	14.8%	-	21.5%	-	12.4%	-
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-
Plane - Private	0.2%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%
Personal RV	1.1%	2.2%	-	4.9%	1.3%	1.9%	17.6%
Motor Coach/Tour bus	0.0%	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%
Other	0.6%	0.6%	-	0.1%	-	0.2%	-
N	953	995	45	1,477	79	1,115	34

TABLE 20: Modes of Transportation to Hilton Head Island



Visitors Arriving by Plane:

At which airport did you land?

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

TABLE 21: Arrival Airport by Year

Which commercial airline did you use?

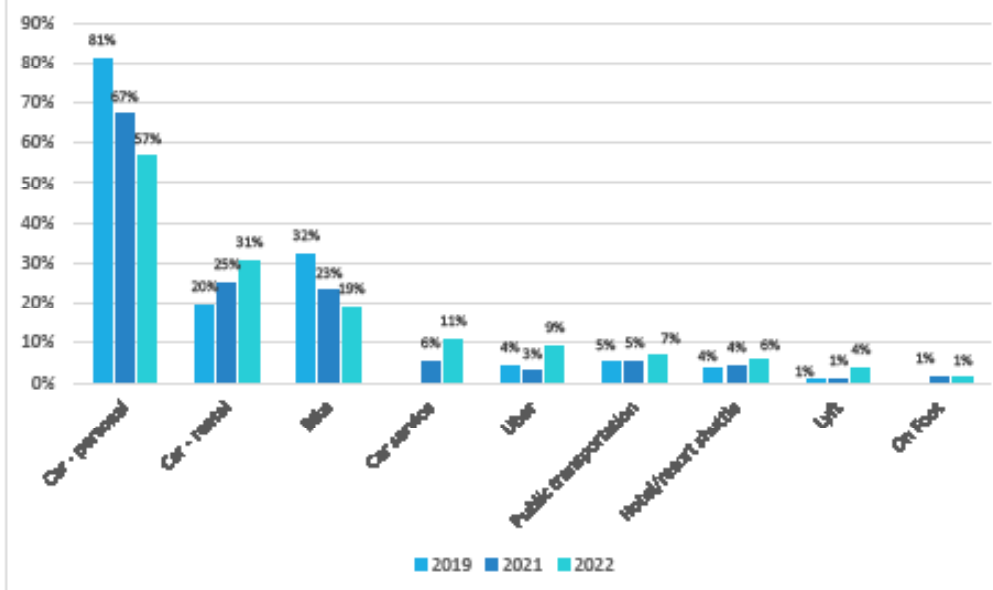
	2021	2022	2023
American Airlines	38.9%	44.8%	25.4%
Southwest	8.1%	9.0%	14.2%
Silver Airways	0.8%	1.8%	14.2%
Air Canada	5.3%	6.8%	12.8%
JetBlue	6.5%	3.6%	12.2%
Frontier	1.6%	2.3%	11.9%
Frontier	0.4%	2.3%	11.9%
Delta	16.6%	7.0%	2.6%
Allegiant	10.1%	8.1%	2.1%
Alaska	2.8%	10.4%	1.7%
Breeze	1.2%	3.2%	1.4%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

TABLE 22: Commercial Airlines Used

⁴ The 2019 survey did not divide commercial flights into non-stop and multi-leg, so stated percentage is for all commercial flights.

Once on Hilton Head Island, what mode[s] of transportation did you use?

Figure 12: Transportation used while on Hilton Head Island



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

TABLE 23: Transportation Used While on Hilton Head

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

	Villa Rental	Hotel	Timeshare	Second Homeowner	Non-paying Guests	Day Trip	Overall
Transportation	\$201	\$335	\$185	\$107	\$162	\$57	\$274
Lodging	\$2,834	\$1,804	\$1,229	\$0	\$0	\$0	\$1,315
Food - Dining	\$606	\$833	\$907	\$579	\$401	\$166	\$763
Food - Grocery	\$338	\$692	\$251	\$314	\$171	\$107	\$573
Shopping	\$485	\$795	\$274	\$415	\$479	\$157	\$684
Spas	\$29	\$276	\$25	\$46	\$49	\$73	\$187
Golf	\$54	\$260	\$72	\$96	\$150	\$29	\$189
Biking	\$69	\$74	\$39	\$16	\$37	\$20	\$63
Performance/Visual Arts	\$35	\$272	\$18	\$12	\$57	\$71	\$183
Festivals	\$12	\$260	\$6	\$18	\$37	\$45	\$168
Museums/Historical Tours	\$42	\$242	\$32	\$12	\$33	\$74	\$163
Boating/Sailing/Fishing	\$137	\$288	\$203	\$31	\$175	\$91	\$231
Nature-based Activities	\$18	\$258	\$17	\$15	\$38	\$41	\$169
Dolphin Tours	\$56	\$272	\$34	\$8	\$48	\$58	\$187
Tennis	\$13	\$259	\$3	\$159	\$11	\$55	\$173
Other Expenses	\$55	\$288	\$64	\$75	\$161	\$13	\$204
Total Expenditure	\$4,864	\$5,890	\$3,352	\$1,894	\$1,917	\$1,414	\$5,241

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

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

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

TABLE 25: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Beaches	83.2%	81.8%	42.2%	69.4%	51.9%	46.5%	44.1%
Biking	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%
Relaxation	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%
Shopping	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%
Time with family/friends	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%
Water excursions	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%
Attend sporting event	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%
Culinary	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%
Museums / Historical tours	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%
Health / Wellness / Fitness	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%
Golf	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%
Festivals	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%
Business/work	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%
Spas	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%
Tennis	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%
Sports activities	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%
Other	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%
N	950	995	45	1,477	79	1,115	34

TABLE 26: Activities Visitors Participated In

Which shopping locations did you visit?

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

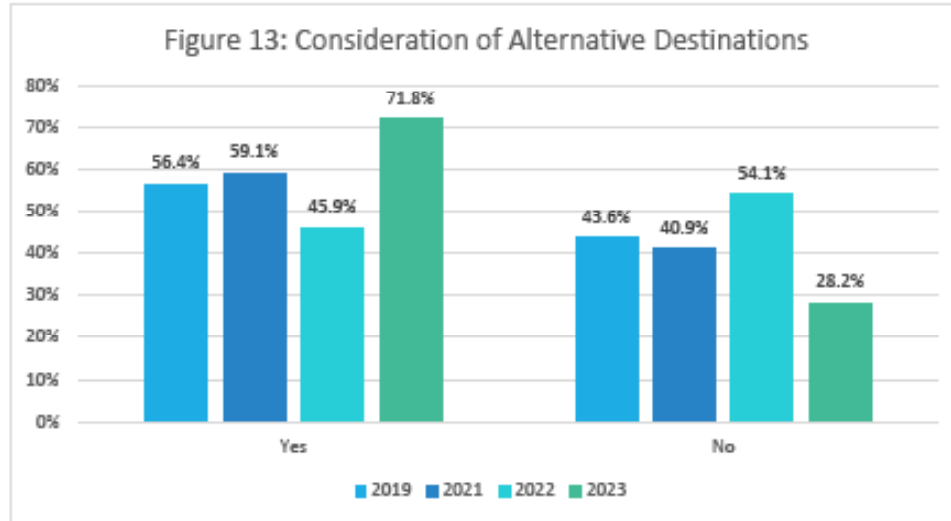
TABLE 27: Shopping Locations Visited**Did you visit any of the following cities while staying on Hilton Head Island?**

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

TABLE 28: Other Cities Visited While on Hilton Head

TRAVEL PLANNING

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



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

TABLE 29: Consideration of alternative destinations by year

Which of the following destinations did you consider visiting?

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

TABLE 30: Alternative Destinations by Year

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

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

TABLE 31: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

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

TABLE 32: Likelihood of Visiting Hilton Head Island Again

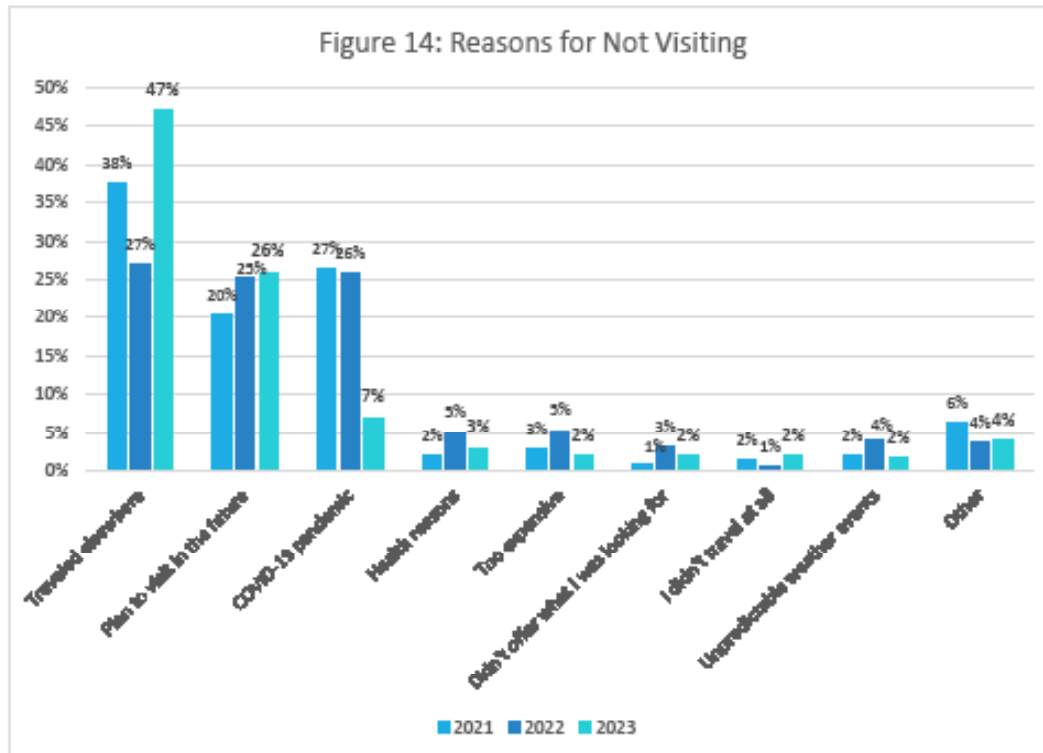
How likely are you to recommend visiting Hilton Head Island to a friend or family member?

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

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

Non-Visitors

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



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

TABLE 34: Reasons for not visiting

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

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

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

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

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

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

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

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

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

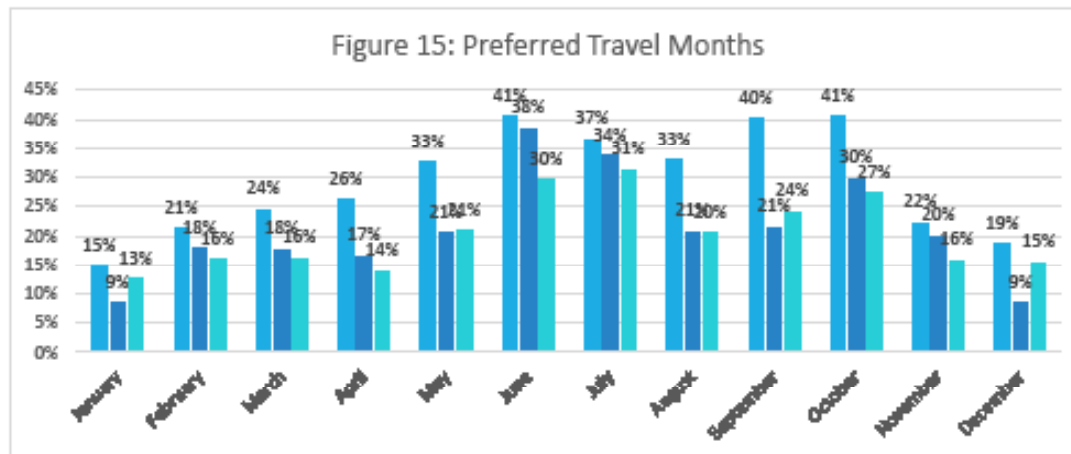
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

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

TABLE 38: Frequency of Leisure/Vacation Trips

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



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

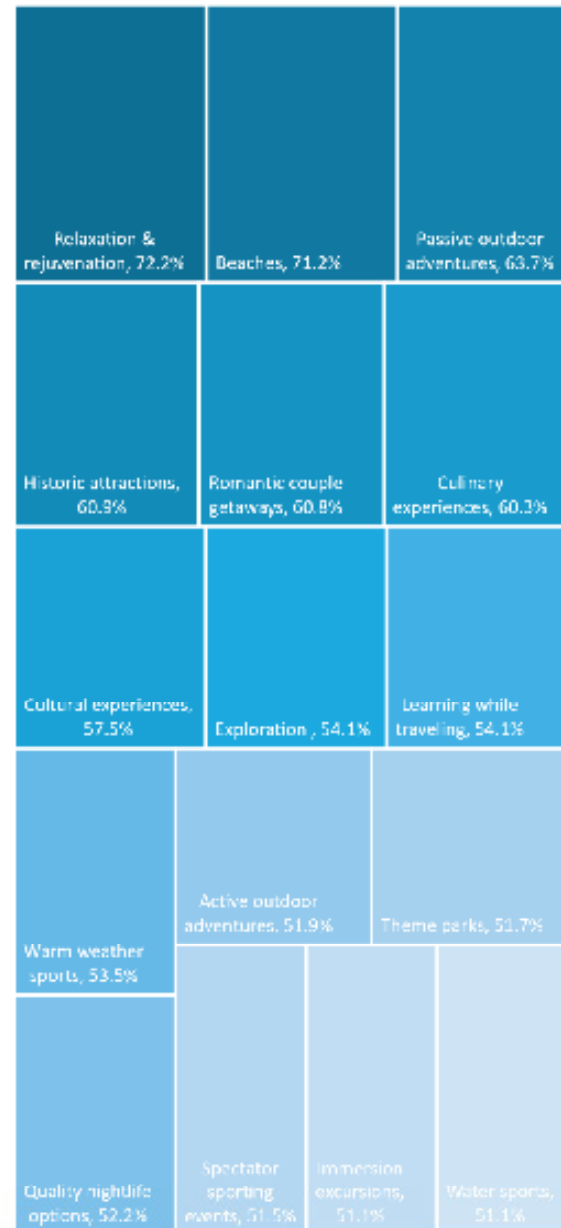
TABLE 39: Preferred Travel Months

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

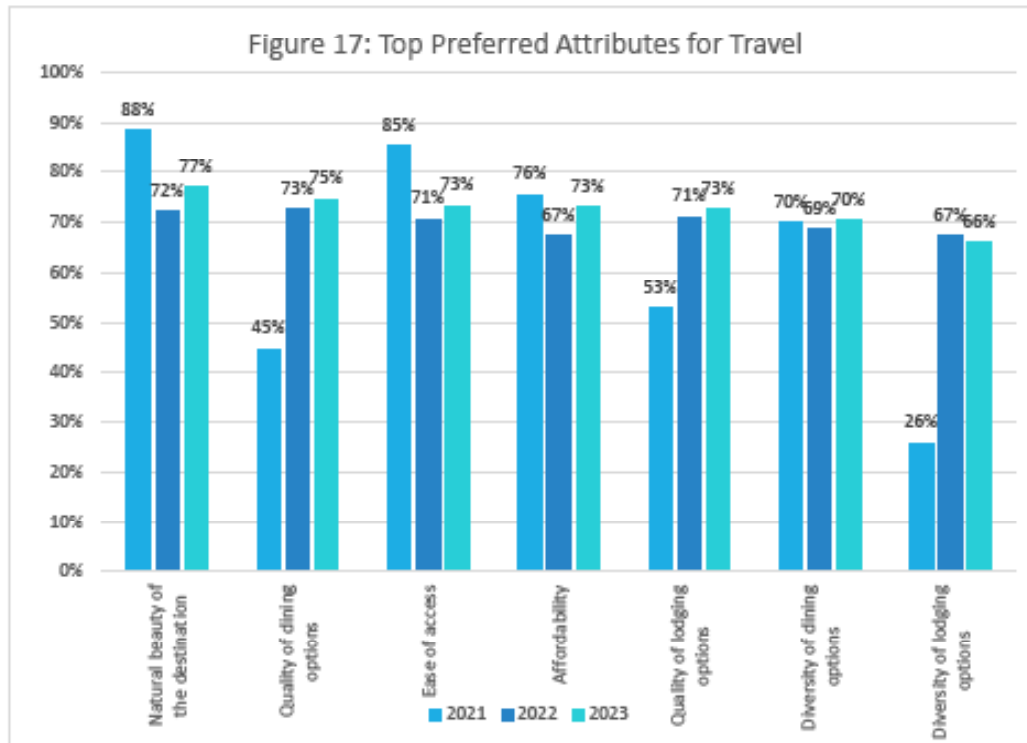
"Appealing" + "Very Appealing"	2021	2022	2023
Relaxation & rejuvenation	85.4%	66.9%	72.2%
Beaches	88.4%	65.1%	71.2%
Passive outdoor adventures	72.6%	64.4%	63.7%
Historic attractions	75.5%	64.4%	60.9%
Romantic couple getaways	70.0%	65.0%	60.8%
Culinary experiences	70.1%	63.7%	60.3%
Cultural experiences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

TABLE 40: Preferred Vacation/Leisure Travel Experiences

Figure 16: Preferred Travel Experiences



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



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

TABLE 41: Preferred Attributes for Vacation/Leisure Travel

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

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

TABLE 42: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

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

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

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

OFFICE OF TOURISM ANALYSIS,
COLLEGE OF CHARLESTON
2023 Estimated Total Impact of Tourism in
Hilton Head Island on Beaufort County

ESTIMATED TOTAL IMPACT OF TOURISM IN

Hilton Head Island

ON BEAUFORT COUNTY, SOUTH CAROLINA 2023



MARCH 2024

CONDUCTED BY:

MELINDA PATIENCE
MARK WITTE, PH.D.



COLLEGE of
CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

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DRAFT

Introduction

This study estimates the economic impact generated by tourism to the Town of Hilton Head Island in the year 2023. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and takes into account the direct spending of the visitors along with the positive secondary effects of such expenditures. The analysis entailed individually estimating the economic impacts associated with various tourist segments, as classified by the visitors' lodging type – villa rental, hotel, timeshare, second homeowners and their non-paying guests, and same-day visitors – and then summing them together for an overall total.

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

Methodology

The economic impact estimations undertaken for this analysis involved various steps and diverse data. Initially, visitor volume estimates for each lodging type were produced using data on lodging demand, as provided by various third-party entities (e.g., CoStar and Key Data), combined with visitor behavior data that is collected via a Visitor Profile Survey. The estimated total number of visitors in each segment for 2023 can be observed in Table 1. These figures then were used to estimate the total direct visitor spending associated with each segment. Such spending estimates also relied upon visitor expenditure data collected as part of the previously mentioned Visitor Profile Survey, which asks respondents about their spending in over a dozen categories (e.g.,

lodging, food, transportation, and activities). The list of expenditure categories, and the total estimated direct expenditure in each category for 2023, can be observed in Table 2.

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

Table 1. Number of HHI Visitors

Segment	Visitors
Villa Rental	920,345
Hotel	481,328
Timeshare	477,628
Second Homeowner	674,278
Non-Paying Guests	174,983
Day Trip	255,358
Total Visitors	2,983,919

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

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

Table 2. 2023 Estimated Total Expenditure by Spending Category

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

- **Labor income:** All forms of employment income, including employee compensation (wages and benefits) and proprietor income.
- **Output:** The total value of industry production, which for the service sector represents total sales, for the retail sector represents gross margins, and for the manufacturing sector represents sales minus inventory change.
- **Direct:** The initial effects to local industries that are directly receiving the expenditures of interest.
- **Indirect:** The secondary effects resulting from business-to-business purchases in the supply chain occurring throughout the region, as triggered by or in support of the direct expenditure activity.
- **Induced:** The ripple effects in the region resulting from household spending of income, after the removal of taxes, savings, and commuters.
- **Taxes:** These revenues take into account a variety of taxes, including sales tax, property tax, and income tax. These figures do not account for tourism taxes, such as accommodation taxes.

Results

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

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

A total of 2.98 million visitors came to Hilton Head Island in 2023, down 3.4% compared to 2022, down 4.6% compared to 2021, up 14.4% compared to 2020, and up 111.2% compared to 2019. The overall economic impact of this tourism for Beaufort County was \$3.61 billion, up 13.5% compared to 2022, up 27.7% compared to 2021, up 162.9% compared to 2020, and up 139.0% compared to 2019. This economic impact represents not just the direct expenditure by visitors, but also the secondary ripple effects of such economic activity that occur as tourism businesses spend operating funds and as tourism dollars are re-spent within the region. Hilton Head Island tourism also supported an estimated 40,641 jobs, which represent 33.3% of all jobs in Beaufort County, as per employment data provided by the Bureau of Economic Analysis. Similar to the economic impact figure, this employment figure does not refer solely to jobs within the tourism sector, but rather to a combination of full-time, part-time, and seasonal jobs that are

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

A total output multiplier for tourist spending was calculated using the model estimates. This multiplier represents the ratio of total economic impact to direct spending. The estimated output multiplier for Hilton Head Island tourism on Beaufort County was 1.35. This signifies that every dollar spent by tourists on Hilton Head Island increased output in the overall Beaufort County economy by a total of \$1.35.

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

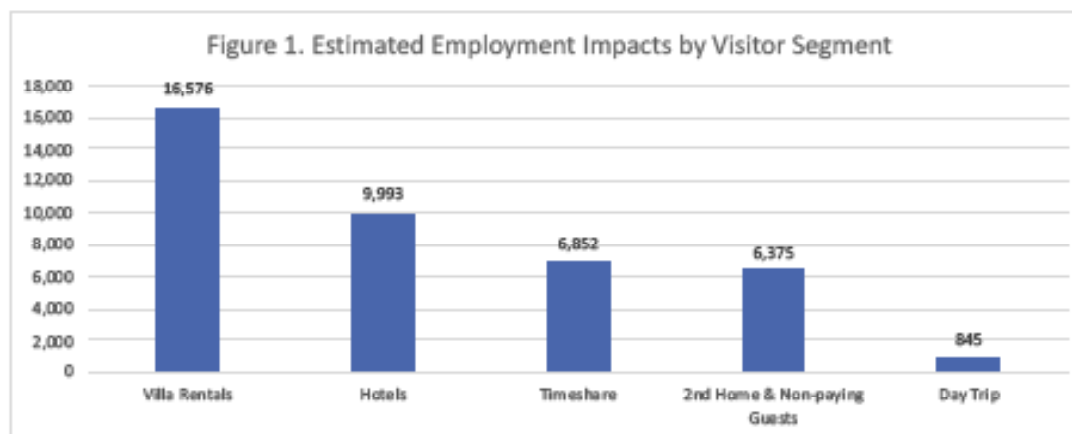
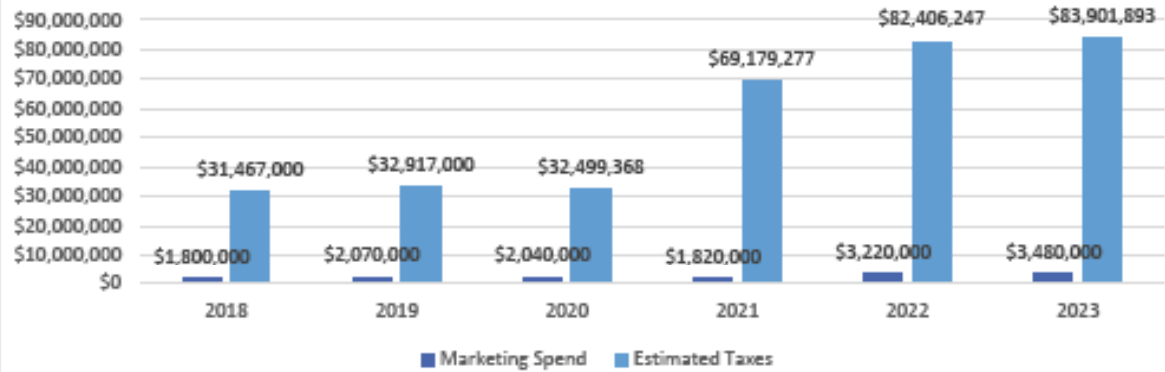


Figure 2. Marketing Spend and Estimated Local Tax Revenue Growth



Appendix

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

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

Table A2. Hotel – Estimated Economic Impact on Beaufort County

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

Table A3. Timeshare – Estimated Economic Impact on Beaufort County

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

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

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

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

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

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

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

Table A7. Top 50 Industries Impacted by HHI Tourism

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

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

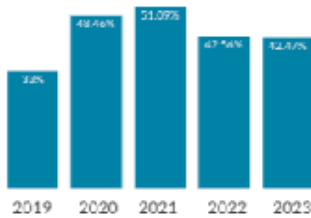
VERB INTERACTIVE
2023 Digital and Social Media Marketing Recap

HILTON HEAD ISLAND PROPER

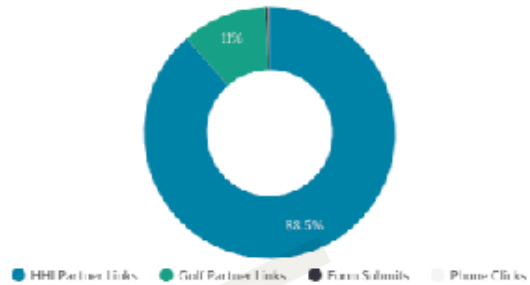
CONVERSION RATE OVERVIEW

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

Conversion Rate



Conversion Breakdown

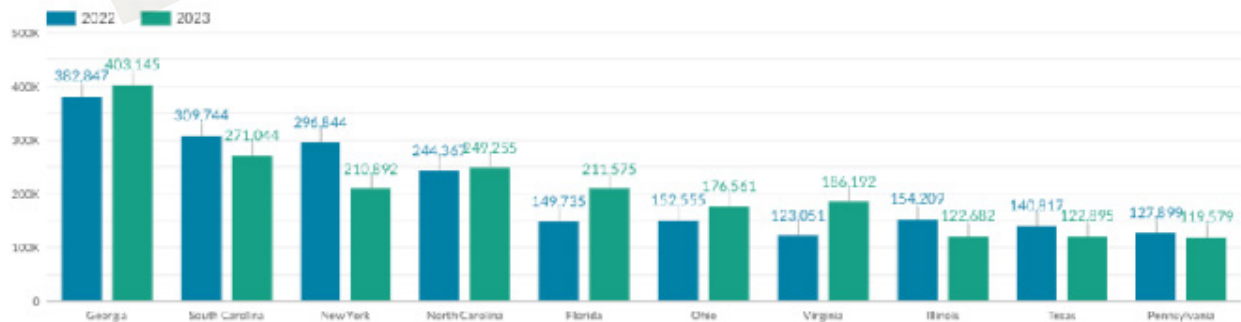


HILTON HEAD ISLAND PROPER

DMAs

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

Top 10 Markets



HILTON HEAD ISLAND PROPER

PAGE PERFORMANCE

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

Top Pages

	Page path and screen class	Pageviews	% of Total Pageviews	Avg Session Duration	Bounce Rate
1.	/	999,948	19%	01:25	41.23%
2.	/see-do	485,739	9%	01:05	50.29%
3.	/offers/hilton-head-island-escapes	431,209	8%	01:19	53.31%
4.	/stay/hotel-brims-resorts	213,315	4%	02:58	52.86%
5.	/events	136,130	3%	01:56	49.46%
6.	/stay	115,371	2%	01:11	57.71%
7.	/about-us	113,577	2%	01:13	43.81%
8.	/stay/vacation-homes-villas	97,953	2%	02:42	60.46%
9.	/see-do/beaches	95,448	2%	01:47	78.59%
10.	/golf/golf-courses	88,521	2%	02:55	46.82%
11.	/golf/golf-getaway	71,426	1%	01:25	52.79%
12.	/hilton-head-island-airport	61,263	1%	01:00	59.31%

HILTON HEAD ISLAND PROPER

GOOGLE PAID METRICS

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

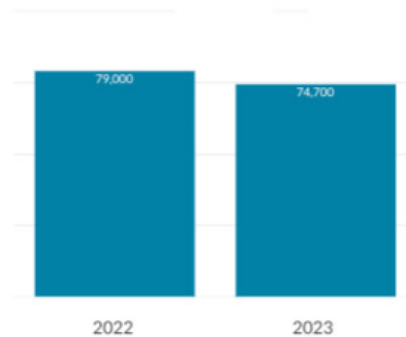
This data includes HHI, HHI Co-op, and SCRPT (when applicable).



HILTON HEAD ISLAND PROPER

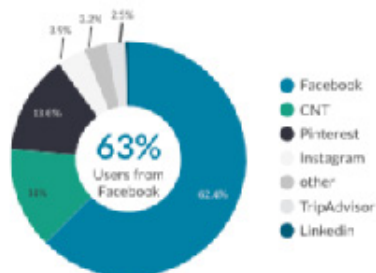
SEARCH INTEREST

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



HILTON HEAD ISLAND

SOCIAL TRAFFIC



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

Social Traffic Engagement

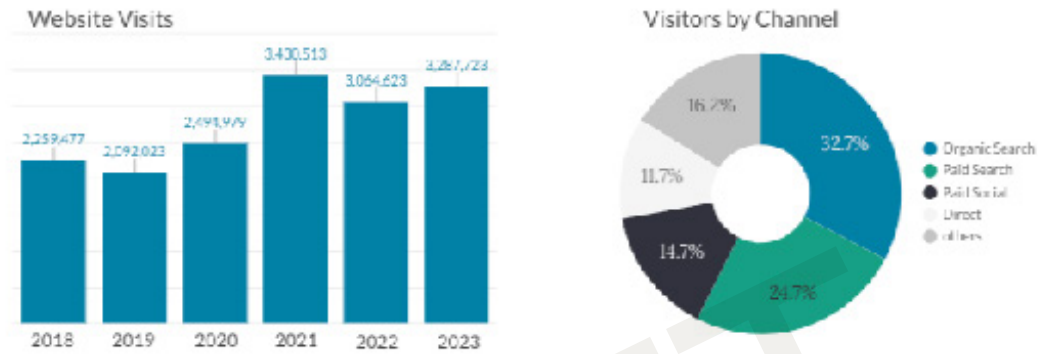
	Social Network	Sessions	% Sessions of Total	Pages / Session	Avg. Session Duration
1.	Facebook	25,795	62%	10.31	07:14
2.	CNT	5,777	14%	1.03	00:23
3.	Pinterest	5,634	14%	28.51	19:45
4.	Instagram	1,625	4%	7.61	10:24
5.	other	1,311	3%	51.00	10:42
6.	TripAdvisor	1,050	3%	15.44	04:05
7.	LinkedIn	163	0%	1.34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

6 7 8 9 10 11 12

HILTON HEAD ISLAND PROPER

TOTAL WEBSITE VISITATION

- In 2023, there were 3.28M visits to the hiltonheadisland.org website. Search traffic (organic and paid) contributed the majority of traffic to the website (69.3%). Traffic to the website increased by +7.27% vs. PY.
- 67.98% of users navigated to the site from a mobile device, followed by 26.62% on a desktop and 5.36% from a tablet.



WEBER SHANDWICK
2023 Public Relations Recap

HILTON HEAD ISLAND 2023 COVERAGE HIGHLIGHTS

COVERAGE HIGHLIGHTS HISTORY/GULLAH CULTURE

TRAVEL+ LEISURE

This Island in South Carolina Has the First Self-governed Town of Formerly Enslaved People in the U.S.



Historical marker for the first self-governed town of formerly enslaved people in the U.S.

During the 18th and 19th centuries, the first self-governed town of formerly enslaved people in the U.S. was established on Hilton Head Island. The town, known as Free Town, was founded by a group of formerly enslaved people who had been brought to the island by a ship captain. The town was self-governed and operated as a community for over 100 years. The town was eventually destroyed by a fire in 1862, but the site was later rediscovered and is now a historical site. The town is located on the eastern end of Hilton Head Island, near the town of Bluffton.

With its rich history and beautiful beaches, Hilton Head Island is a great destination for anyone looking for a relaxing vacation. The island is home to many historic sites, including the first self-governed town of formerly enslaved people in the U.S. The island is also known for its beautiful beaches and clear water, making it a great spot for swimming and sunbathing.

Hilton Head Island is a beautiful destination for anyone looking for a relaxing vacation. The island is home to many historic sites, including the first self-governed town of formerly enslaved people in the U.S. The island is also known for its beautiful beaches and clear water, making it a great spot for swimming and sunbathing.





It is likely that the two studies were conducted with different populations and applied slightly different procedures for the purpose of comparing findings and inferring a general conclusion about the relationship between the variables being studied. The authors of the first study conducted a literature search to identify relevant studies. They appeared to speak broadly and qualitatively about the relationship between the variables being studied. The authors of the second study conducted a literature search to identify relevant studies. They appeared to speak more quantitatively about the relationship between the variables being studied. The authors of the second study also conducted a meta-analysis of the studies they identified. This suggests that the two studies were conducted with different populations and applied slightly different procedures for the purpose of comparing findings and inferring a general conclusion about the relationship between the variables being studied.

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



Hilber Head Health on Hilber Head Island, South
Oceania

Ellen "Fast Health" is situated on Ellen Head Island, which is famous for its incredible beauty, world-class golf course, and Southern charm. Ellen "Fast Health" offers three different wellness retreat programs for women: a retreat



Abstract The objective of this study was to determine the effect of a 12-week intervention on the well-being of 180 men in a correctional facility. The intervention was a combination of physical activity and cognitive-behavioral therapy. The results showed that the intervention had a positive effect on the well-being of the men, with significant improvements in self-esteem, self-efficacy, and coping strategies. The findings suggest that a combination of physical activity and cognitive-behavioral therapy can be an effective intervention for improving the well-being of men in a correctional facility.

Anne Palmer, director of behavioral health at Hizon Health, defined self-care as any activity you do or pursue to preserve or improve your physical, emotional, or mental health. "It's taking time to listen to what your body and mind need—or, even then, taking action on that—is what self-care is all about," said Palmer. "It's taking control of your own self-care, and it doesn't mean..."

The Best Off-Season Trips To Plan Now



Hilton Head Island, South Carolina

Barriers to the use of information systems and health information systems in general have been studied extensively. These barriers are closely related to the types of systems in use, the quality of the technology, the users' knowledge, the education of providers, the culture of the organization, the facilities and the environment, and the social factors that govern human social behavior.

TRAVEL+LEISURE
Charleston, South Carolina, in Savannah, Georgia

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



From the historic streets of Charleston, South Carolina, to the scenic views of Savannah, Georgia, this road trip offers a mix of history, culture, and natural beauty. The trip includes visits to the historic district, the Savannah Historic District, and the beautiful beaches of the Atlantic coast. The trip is perfect for families looking for a mix of history, culture, and natural beauty.

VOGUE

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

Hilton Head Island, South Carolina



Hilton Head Island is a perfect destination for a bachelorette party. The island offers a mix of relaxation, adventure, and social activities. From the beautiful beaches to the historic lighthouses, there is something for everyone. The island is also known for its excellent dining and shopping options, making it a great choice for a girls' trip.

Southern Living

The Best South Carolina Beaches For A Relaxing Lowcountry Getaway

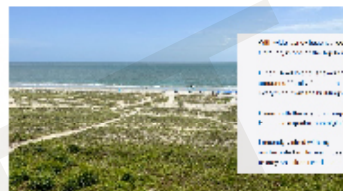


01 Hilton Head Island

Hilton Head Island is a beautiful beach destination that offers a mix of relaxation and adventure. The island is known for its pristine beaches, historic lighthouses, and excellent dining and shopping options. It is a perfect choice for a relaxing Lowcountry getaway.

THE POINTS GUY

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



Hilton Head Island is a great destination for families. The island offers a mix of relaxation, adventure, and social activities. From the beautiful beaches to the historic lighthouses, there is something for everyone. The island is also known for its excellent dining and shopping options, making it a great choice for a family vacation.

BEST LIFE

The 10 Best Beaches Only All-Purpose Resorts in the U.S.

Hilton Head Island, South Carolina



Hilton Head Island is a beautiful beach destination that offers a mix of relaxation and adventure. The island is known for its pristine beaches, historic lighthouses, and excellent dining and shopping options. It is a perfect choice for a relaxing Lowcountry getaway.

THE TRAVEL

Hilton Head Island, South Carolina

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



Hilton Head Island is a great destination for a fall vacation. The island offers a mix of relaxation, adventure, and social activities. From the beautiful beaches to the historic lighthouses, there is something for everyone. The island is also known for its excellent dining and shopping options, making it a great choice for a family vacation.

TOWN&COUNTRY

The 50 Best Beaches on the East Coast

Hilton Head Island, South Carolina



Hilton Head Island is a beautiful beach destination that offers a mix of relaxation and adventure. The island is known for its pristine beaches, historic lighthouses, and excellent dining and shopping options. It is a perfect choice for a relaxing Lowcountry getaway.

TRAVEL+LEISURE

11 All-inclusive Resorts Perfect for a Girls Trip

01 Hilton Head Health

Hilton Head Health is a great destination for a girls' trip. The resort offers a mix of relaxation, adventure, and social activities. From the beautiful beaches to the historic lighthouses, there is something for everyone. The resort is also known for its excellent dining and shopping options, making it a great choice for a family vacation.

Parents

11 Best Family Beach Towns for Your Next Vacation



1. Hilton Head Island, South Carolina

Over 100 miles of beautiful beaches, world-class golf courses, and a variety of family-friendly activities make Hilton Head Island a top destination for families. The island is known for its pristine beaches, world-class golf courses, and a variety of family-friendly activities. Hilton Head Island is a top destination for families, offering a variety of activities for all ages. The island is known for its pristine beaches, world-class golf courses, and a variety of family-friendly activities. Hilton Head Island is a top destination for families, offering a variety of activities for all ages. The island is known for its pristine beaches, world-class golf courses, and a variety of family-friendly activities.

TRAVEL PULSE

2023 Travel Guide to the United States

Best Places for Couples

Hilton Head Island, South Carolina

Hilton Head Island is a beautiful destination for couples, offering a variety of activities for all ages. The island is known for its pristine beaches, world-class golf courses, and a variety of family-friendly activities. Hilton Head Island is a top destination for families, offering a variety of activities for all ages. The island is known for its pristine beaches, world-class golf courses, and a variety of family-friendly activities.



OUTDOORS WIRE

Celebrate National Lighthouse Day with these 20 US Lighthouses

Hilton Head Island, South Carolina

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redbook

The Best Road Trips from Florida



6

Hilton Head, South Carolina

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Where to Go on the Perfect South Carolina Lowcountry Vacation

Beaches, Golf, and More on Hilton Head Island



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THE POINTS GUY

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

The South Carolina coast



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BAZAAR

Try These Affordable Summer Getaways In The US

Enjoy your vacation without also trying the bank.

12
Hilton Head Island, South Carolina



Whether it's a relaxing getaway to enjoy the beach, or a fun family vacation, Hilton Head Island, South Carolina, is a great choice for a summer getaway. The island is known for its beautiful beaches, historic lighthouse, and world-class golf courses. It's a perfect destination for anyone looking for a peaceful and affordable summer escape.

For summer, you'll find many great options for the family, including a variety of fun activities for kids, like beach games, fishing, and kayaking. The island is also home to some of the best restaurants and hotels in the area, so you can enjoy a delicious meal or a comfortable stay while you're there.

Hilton Head Island is a beautiful and affordable destination for a summer getaway. With its beautiful beaches, historic lighthouse, and world-class golf courses, it's a perfect choice for anyone looking for a peaceful and affordable summer escape.

Fodor's Travel

14 Classic American Summer & Towns That Are Also Perfect Winter Escapes



From Hilton Head Island to the historic town of Nantucket, these 14 classic American summer and winter escape destinations are perfect for anyone looking for a peaceful and affordable getaway.

All the classic American summer and winter escape destinations are perfect for anyone looking for a peaceful and affordable getaway. From Hilton Head Island to the historic town of Nantucket, these 14 classic American summer and winter escape destinations are perfect for anyone looking for a peaceful and affordable getaway.

redbook

Check Out These Underrated Spring Break Destinations

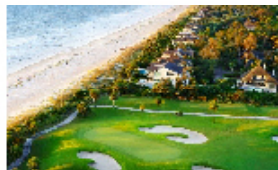
12
Hilton Head Island, South Carolina



Whether it's a relaxing getaway to enjoy the beach, or a fun family vacation, Hilton Head Island, South Carolina, is a great choice for a summer getaway. The island is known for its beautiful beaches, historic lighthouse, and world-class golf courses. It's a perfect destination for anyone looking for a peaceful and affordable summer escape.

TRAVELPULSE

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



Golf Traveler's Paradise

Hilton Head Island is a perfect destination for golf travelers. With its world-class golf courses, beautiful beaches, and historic lighthouse, it's a perfect choice for anyone looking for a peaceful and affordable summer escape.

Parade

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

Orchid Paulmeier

Owner, founder, and chef at **One Hot Mama's**, Hilton Head, South Carolina

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



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

Foodie Traveler's Delight

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

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

Hudson's Seafood Lounge on the Pines, an acclaimed seafood restaurant, is located on the waterfront, is known for its high catch options, the seafood favorites, and Lowcountry-style dishes. Hudson's is also one of the best restaurants to visit if you want to dine with sunset views it a must when visiting Hilton Head Island.



Seaside sunset in a beautiful location. Hudson's Seafood Lounge on the Pines is Hilton Head Island, South Carolina. Photo by Amy Zimmerman

2023 MEDIA MENTIONS

*Represents 2023 calendar year mentions

PRINT/ONLINE

1,430 MENTIONS

6,138,422,879

IMPRESSIONS

\$2,862,512.36

AD VALUE

BROADCAST

708 MENTIONS

238,538,080

IMPRESSIONS

\$18,165,638.07

AD VALUE

TOTAL

2,138 MENTIONS

6,376,960,959 IMPRESSIONS

\$21,028,150.43

AD VALUE



DRAFT



HILTON HEAD ISLAND
SOUTH CAROLINA



TOWN OF HILTON HEAD ISLAND

Staff Report Memo

TO: Accommodations Tax Advisory Committee
FROM: Shena Smith, Finance Assistant
VIA: Marc Orlando, Town Manager
CC: Jeff Herriman, Interim Finance Director
DATE: March 28, 2023
SUBJECT: Discussion Regarding Potential Amendments to the Accommodations Tax Grant Application for 2024

RECOMMENDATION:

Staff recommends that the Accommodations Tax Advisory Committee review and discuss last year's grant application to determine if any updates or changes are needed that could prove beneficial for the 2025 calendar year.

BACKGROUND:

The Accommodations Tax Advisory Committee annually discusses potential amendments to the Accommodations Tax Grant Application. By reviewing the previous year's submissions, the committee members work to provide additional clarity and efficiency within the application for both committee members and future potential applicants.

ATTACHMENTS:

1. 2024 Accommodations Tax Grant Application



ACCOMMODATIONS TAX ADVISORY COMMITTEE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA

2024 Accommodations Tax Grant Application

All applications must be fully completed and submitted electronically to the Town of Hilton Head Island no later than 4:00 p.m. on Friday, September 1, 2023.

This application package includes the following:

1. Guideline for Applications
2. Accommodations Tax Funds Application
3. Accommodations Tax Advisory Committee Members
4. Announcement of Application Preparation Workshop
5. Meeting Schedule
6. Copy of Accommodations Tax Laws

Applications will first be subjected to Town Staff and Committee review for compliance with the law as to eligibility. For those applications passing the initial review, the applicants will be asked to make personal presentations at Committee hearings. These presentations are scheduled for **October 12 and October 19, 2023**. Each applicant will be notified by email (please make sure to provide a valid email address) of the time scheduled for its presentation.

The Committee requests each applicant to adhere strictly to the guidelines and requirements provided herein.

Failure to correctly complete the application in its entirety, including the necessary board resolution and financial data, may disqualify what may be an otherwise qualifying application.

GUIDELINES FOR APPLICATIONS FOR ACCOMMODATIONS TAX FUNDS

A. INTRODUCTION

1. As applicable to Hilton Head Island, the State law (see copy attached and section 6-4-10 in particular) specifies three groups, in general, which are entitled to receive bed tax funds after other mandated distributions have been made from the total funds available:

- a. Town government: *"Based on the estimated percentage of costs directly attributed to tourists," Town expenditures for "the criminal justice system, law enforcement, fire protection, solid waste collection and health facilities when required to serve tourists and tourist facilities." See 6-4-10(b) and (b.4).*
 - b. Qualified groups advertising and promoting tourism *in order to develop and increase tourism. See 6-4-10(b.1).*
 - c. Qualified sponsors of arts and cultural events *and for construction, maintenance, and operation of facilities for civic and cultural activities. See 6-4-10(b.2 and b.3).*
2. The law requires that the funds be used for **tourism-related expenditures** "primarily in the geographical area ... (of Hilton Head Island)." See 6-4-10(d). Therefore, the committee will not look with favor on applications for funds to be spent outside the Town or for activities or enterprises conducted outside the Town. The Accommodations Tax Advisory Committee will consider how applications either drive tourism to the Town or enhance our visitors' experience.
 3. **Applications must be filed by the publicly announced filing deadline.**
The Committee may, for extraordinary reasons which prevent timely filing, extend the filing deadline.

B. NOTES REGARDING THE APPLICATION

1. Summary of Grant Request

- a. Provide the organization name and the name of the project/event.
- b. Provide the requested contact information for the organization and a primary contact.
- c. List the organization's total annual budget and its 2024 grant request amount.
- d. Provide a brief description of the intended use of the grant and outline how the money would be used. *The Committee uses this as a cover page summary – applicants will have an opportunity to provide more detail in the application.*
- e. Describe how the organization either drives tourism to the Island or enhances the visitor experience. Show how this is currently being measured. *This provides the Committee with the necessary insight as to how the organization/event impacts the general tourism industry on the Island.*
- f. Provide the annual number of patrons served by the organization/event. Also provide the total number of tourists served in this total annual number. *This provides the Committee with an estimated tourist ratio which may be used to determine grant award allocation based off TERC recommended practices.*

2. Description of Operations

- a. Describe the organization/event purpose and overall operation.
- b. The description must state what is intended to be accomplished by Accommodation Tax funds, and the source and amount of other funds to be committed to the operations.
- c. Describe the impact to the organization should it not be fully funded for the 2024 grant request.

- d. The "Impact on or Benefit to Tourism" statement should be supported by data and other records or history insofar as possible. All applicants must be able to provide the number of visitors served on an annual basis, or at the event for which funds are requested, and state how this number is calculated. Whenever possible, applicants should provide additional data on how its attendance numbers drive tourism. *(The State's legal definition of a "visitor" is someone who travels from beyond the government's limits, i.e., outside the Town of Hilton Head Island; however, strong consideration will be given to the State's Tourism Expenditure Review Committee (TERC) preferred definition that a "tourist" is someone who travels from outside a 50-mile radius.)*
- e. Per State requirements, please show how the grant request would be classified (as a percentage) by the categories listed. The total amount must equal 100%.
- f. To qualify for an award, all planned expenditures must fall into the categories described in Section B.5 of this application (Section 6-4-10 of State Law). Please ensure that the entire grant request is eligible and adequately described in Sections B.1-4 of this application. All details described must reconcile with the total request.

3. Funding

- a. Provide a brief description on how the organization is currently funded.
- b. As a percentage, show how the current funding is categorized.
- c. Please list the top 3 sources of public funding applied for, or received, for 2023 and 2024.

4. Financial Guarantees and Procedures

- a. Applicants must include a copy of their organization's official minutes wherein the organization approves the application and commits the organization to financial responsibility for carrying it out to the stage of completion contemplated in the application, should funding be approved.
- b. State whether the organization follows the Town's procurement guidelines, its own procurement guidelines, or does not follow procurement guidelines. For reference, a link to the Town's Standard Operating Procedures for Procurement/Contracting has been provided from within the on-line application portal.

5. Measuring Effectiveness:

- a. Provide a description of how the prior ATAX funds were used, and to what extent the organization's objectives were achieved. Numerics are encouraged. Bullets or an outline format may be used.
- b. Describe how the organization plans to reduce its dependency on ATAX funds in the future or increase its impact on tourism.

6. Executive Summary:

- a. Please use the link in the application portal to access and complete the "ATAX Effectiveness" form to report uses of the organization's prior ATAX grant, if applicable. When completing the form, reference the Categories in Section B.5 of this application, and report on the specifics of each Category awarded to your organization in its most recent ATAX grant. If you choose to create your own format for the Executive Summary instead of using the ATAX Effectiveness form, please reference the form and use the criteria as a guideline.

7. Application Submission

- a. Requests for funding must be submitted by a non-profit organization. Applications cannot be accepted from individuals, for-profit entities, or ad-hoc committees. Proof of non-profit status must accompany first time applications, e.g., IRS 501 (c) (3) letter.
- b. The full name, postal mailing address, email address and telephone number of a primary contact person, given the authority and responsibility to represent the application before the Committee, must be included in this section.

2024

ACCOMMODATIONS TAX FUNDS REQUEST APPLICATION

For Office Use Only	Time Received:	By:
Date Received:		

Applications will not be accepted if submitted after 4:00 P.M. on September 1, 2023

A. Summary of Grant Request:

ORGANIZATION NAME: _____

Project/Event Name: _____

Contact Name: _____ Title: _____

Address: _____

Email Address: _____ Contact Phone: _____

Event Date: _____ Event Location: _____

Total Budget: _____ **Grant Amount Requested:** _____

Provide a brief summary on the intended use of the grant and how the money would be used.
(100 words or less)

How does the organization/event either drive tourism to Hilton Head Island or enhance the visitor experience on Hilton Head Island? How is this impact being measured? (100 words or less)

- A. Total Number of Physical Tourists Served:** _____
(A Tourist is considered a non-resident, traveling more than 50 miles to the Town of Hilton Head Island)
- B. Total Number of Physical Visitors Served:** _____
(A Visitor is considered a non-resident, who travels 50 miles or less to visit the Town of Hilton Head Island)
- C. Total Number of Physical Residents Served:** _____
(A Resident is considered any person who claims their property address within the limits of the Town of Hilton Head Island as their primary residence.)
- D. Total Number of Physical Patrons Served (A+B+C=D)** _____

How was the Number of Visitors Documented? (250 words or less)

(Please explain if you had virtual events and approximately how many visitors attended).

B. DESCRIPTION OF OPERATIONS:

1. For state reporting purposes, give a brief description of the organization. (250 words or less)

2. Describe in detail how the requested grant funding would be used? (250 words or less)

3. **What impact would partial funding have on the activities if full funding were not received? What would the organization change to account for partial funding?** (100 words or less)

4. **What is the expected economic impact and benefit to the Island's tourism?** (100 words or less)

5. In order to comply with the State's *Tourism Expenditure Review Committee* annual reporting requirements, **please classify the current grant request into the following authorized categories:**

- | | |
|--|---------|
| 1 – <u>Destination Advertising/Promotion</u> | _____ % |
| <i>Advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity</i> | |
| 2 – <u>Tourism-Related Events</u> | _____ % |
| <i>Promotion of the arts and cultural events</i> | |
| 3 – <u>Tourism-Related Facilities</u> | _____ % |
| <i>Construction, maintenance and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities</i> | |
| 4 – <u>Tourism-Related Public Services</u> | _____ % |
| <i>The criminal justice system, law enforcement, fire protection, solid waste collection and health facilities when required to serve tourists and tourist facilities (This is based on the estimated percentage of costs directly attributed to tourists. It also includes public facilities such as restrooms, dressing rooms, parks and parking lots)</i> | |
| 5 – <u>Tourist Public Transportation</u> | _____ % |
| <i>Tourist shuttle transportation</i> | |
| 6 – <u>Waterfront Erosion/Control/Repair</u> | _____ % |
| <i>Control and repair of waterfront erosion</i> | |
| 7 – <u>Operation of Visitor Information Centers</u> | _____ % |
| <i>Operating visitor information centers</i> | |

Total: 100 %

6. If not covered elsewhere in the application, please describe measures the organization has already taken, is currently taking, and/or will be taking with other like tourism service providers to (a) explore opportunities for collaborative promotional or operational efforts to collectively enhance tourism, (b) better leverage spending to drive tourism, and/or (c) to provide a venue of service not otherwise available to tourists and visitors to the Town of Hilton Head Island.

7. Additional comments

C. FUNDING:

- 1. Please describe how the organization is currently funded. (100 words or less)**

- 2. Please also estimate, as a percentage, the source of the organization's total annual funding.**

_____ Government Sources	_____ Private Contributions, Donations & Grants
_____ Corporate Support, Sponsors	_____ Membership Dues, Subscriptions
_____ Ticket Sales, or Sales & Services	_____ Other

- 3. Has the organization requested other ATAX or any other funding from other public sources or organizations? If so, please list top 3 sources and amounts.**

D. FINANCIAL INFORMATION:

Fiscal year disclosure: Start Month: _____ End Month: _____

Financial Statement Requirements:

1. The upcoming fiscal year's operating budget for the organization.
2. The previous two fiscal years and current year-to-date profit and loss reports for the organization.
3. The previous two fiscal years and current year-to-date balance sheets.
4. The previous two years and current year IRS Form 990 or 990T.

E. FINANCIAL GUARANTEES AND PROCEDURES:

1. Provide a copy of the **official minutes** wherein the organization approves the submission of this application.
2. Indicate whether your organization follows Town procurement guidelines or has its own procurement guidelines which are utilized and followed in the expenditure of ATAX grant funds.
 - ☐ Follow Town procurement guidelines
 - ☐ Utilize and follow organization's own procurement guidelines
 - ☐ Our organization does have or follow procurement guidelines

F. MEASURING EFFECTIVENESS:

If you received 2022 or 2023 HHI ATAX funds

1. **List any ATAX award amounts received in 2022 and/or 2023? How were the ATAX funds used? To what extent were your objectives achieved? The ATAX Effectiveness Measurement spreadsheet available in the application portal will show the numerics. Use the space below for verbal comments. (200 words or less)**

2. **What impact did this have on the success of the organization/event and how did it benefit the community? (200 words or less)**

3. **How does the organization measure the effectiveness of both the overall activity and of individual programs?** (200 words or less)

G. Executive Summary:

Provide an executive summary using the ATAX Effectiveness Measurement spreadsheet provided via a link in the application portal, or your own format. If creating your own format, please refer to the ATAX Effectiveness Measurement spreadsheet and use the criteria as a guideline. (1300 words or less)



**ACCOMMODATION TAX ADVISORY COMMITTEE
TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA**

APPLICATION FINAL CHECKLIST

(Complete and return this list with the application)

- ☐ The application is being filed by the **September 1, 2023, 4:00 PM** deadline.
- ☐ We have reviewed and followed the application guidelines.
- ☐ We have provided a Board Resolution approving this application.
- ☐ We have supplied all required Financial Data necessary to complete this application.
- ☐ We will be prepared to make a verbal presentation to the Committee and answer questions when we are scheduled to do so.

ACCOMMODATIONS TAX ADVISORY COMMITTEE

NAME & SEAT	TERM EXPIRATION
Stephen Arnold Hospitality	June 30, 2022 (7/19-6/22) & (7/22-6/25)
John Farrell Hospitality	June 30, 2024 (10/20-6/21) & (7/21-6/24)
Keith Schlegel At-Large	June 30, 2026 (7/23-6/26)
James Fluker At-Large	June 30, 2024 (8/18-6/21) & (7/21-6/24)
Cecil Eck Lodging	June 30, 2026 (4/23-6/23 & 7/23-6/26)
Margaret Johnson Lodging	June 30, 2024 (7/21-6/24)
Martin Lesch Cultural	June 30, 2026 (7/23-6/26)

NOTICE

ACCOMMODATIONS TAX ADVISORY COMMITTEE

will hold a workshop

August 10, 2023 at 2:00 p.m.

in the

Benjamin M. Racusin Council Chambers

The purpose of this workshop is to assist potential applicants with completing the applications for Accommodations Tax funds.

It is suggested that potential applicants attend this session.

Please contact the Committee Secretary

Shena Smith

at (843) 715-3241 or shenas@hiltonheadislandsc.gov

if you have any questions or concerns.

NOTE: A Town Council quorum may result in the event four or more Council members attend this meeting.

ACCOMMODATIONS TAX ADVISORY COMMITTEE 2023 SCHEDULE

Thursday	April 6	9:00 a.m. – DMO Budget & Marketing Plan Presentation	Council Chambers
Thursday	July 6	9:00 a.m. – Swearing in of members & Election of officers	Council Chambers
Monday	July 31	8:00 a.m. – Grant Application available for electronic filing	www.hiltonheadislandsc.gov
Thursday	August 10	2:00 p.m. – ATAX Applicant Workshop	Council Chambers
Friday	September 1	4:00 p.m. – Application Deadline	www.hiltonheadislandsc.gov
Thursday	September 28	9:00 a.m. – Preliminary Review of Applications	Council Chambers
Thursday	October 12	9:00 a.m. – 4:30 p.m. Applicant Hearings	Council Chambers
Thursday	October 19	9:00 a.m. – 4:30 p.m. Applicant Hearings	Council Chambers
Thursday	November 2	9:00 a.m. – Review and Recommendations	Council Chambers

Note: Town Council will meet to award the Accommodations Tax Grant, date TBD.

CHAPTER 4.

ALLOCATION OF ACCOMMODATIONS TAX REVENUES

SECTION 6-4-5. Definitions.

As used in this chapter:

- (1) "County area" means a county and municipalities within the geographical boundaries of the county.
- (2) "Cultural", as it applies to members of advisory committees in Section 6-4-25, means persons actively involved and familiar with the cultural community of the area including, but not limited to, the arts, historical preservation, museums, and festivals.
- (3) "Hospitality", as it applies to members of the committees in item (2), means persons directly involved in the service segment of the travel and tourism industry including, but not limited to, businesses that primarily serve visitors such as lodging facilities, restaurants, attractions, recreational amenities, transportation facilities and services, and travel information and promotion entities.
- (4) "Travel" and "tourism" mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work.

SECTION 6-4-10. Allocation to general fund; special fund for tourism; management and use of special fund.

The funds received by a municipality or a county in county areas collecting more than fifty thousand dollars from the local accommodations tax provided in Section 12-36-2630(3) must be allocated in the following manner:

- (1) The first twenty-five thousand dollars must be allocated to the general fund of the municipality or county and is exempt from all other requirements of this chapter.
- (2) Five percent of the balance must be allocated to the general fund of the municipality or county and is exempt from all other requirements of this chapter.
- (3) Thirty percent of the balance must be allocated to a special fund and used for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity. To manage and direct the expenditure of these tourism promotion funds, the municipality or county shall select one or more organizations, such as a chamber of commerce, visitor and convention bureau, or regional tourism commission, which has an existing, ongoing tourist promotion program. If no organization exists the municipality or county shall create an organization with the same membership standard in Section 6-4-25. To be eligible for selection the organization must be organized as a nonprofit organization and shall demonstrate to the municipality or county that it has an existing, ongoing tourism promotion program or that it can develop an effective tourism promotion program. Immediately upon an allocation to the special fund, a municipality or county shall distribute the tourism promotion funds to the organizations selected or created to receive them. Before the beginning of each fiscal year, an

organization receiving funds from the accommodations tax from a municipality or county shall submit for approval a budget of planned expenditures. At the end of each fiscal year, an organization receiving funds shall render an accounting of the expenditure to the municipality or county which distributed them.

(4)(a) The remaining balance plus earned interest received by a municipality or county must be allocated to a special fund and used for tourism-related expenditures. This section does not prohibit a municipality or county from using accommodations tax general fund revenues for tourism-related expenditures.

(b) The funds received by a county or municipality which has a high concentration of tourism activity may be used to provide additional county and municipal services including, but not limited to, law enforcement, traffic control, public facilities, and highway and street maintenance, as well as the continual promotion of tourism. The funds must not be used as an additional source of revenue to provide services normally provided by the county or municipality but to promote tourism and enlarge its economic benefits through advertising, promotion, and providing those facilities and services which enhance the ability of the county or municipality to attract and provide for tourists.

“Tourism-related expenditures” include:

1. advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity;
2. promotion of the arts and cultural events;
3. construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities;
4. the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;
5. public facilities such as restrooms, dressing rooms, parks, and parking lots;
6. tourist shuttle transportation;
7. control and repair of waterfront erosion;
8. operating visitor information centers.

(c) Allocations to the special fund must be spent by the municipality or county within two years of receipt. If the allocations are not spent within two years, the municipality or county is subject to the provisions of Section 6-4-30(6). However, the time limit may be extended upon the recommendation of the county or municipality and approval of the South Carolina Accommodations Tax Oversight Committee in Section 6-4-30. An extension must include provisions that funds be committed for a specific project or program.

(d) In the expenditure of these funds, counties and municipalities are required to promote tourism and make tourism-related expenditures primarily in the geographical areas of the county or municipality in which the proceeds of the tax are collected where it is practical.

SECTION 6-4-15. Use of revenues to finance bonds.

A municipality or county may issue bonds, enter into other financial obligations, or create reserves to secure obligations to finance all or a portion of the cost of constructing facilities for civic activities, the arts, and cultural events which fulfill the purpose of this chapter. The annual

debt service of indebtedness incurred to finance the facilities or lease payments for the use of the facilities may be provided from the funds received by a municipality or county from the accommodations tax in an amount not to exceed the amount received by the municipality or county after deduction of the accommodations tax funds dedicated to the general fund and the advertising and promotion fund. However, none of the revenue received by a municipality or county from the accommodations tax may be used to retire outstanding bonded indebtedness unless accommodations tax revenue was obligated for that purpose when the debt was incurred.

SECTION 6-4-20. Administration account established; State Treasurer's duties; distribution of account revenues; exceptions to tourism spending mandate.

(A) An accommodations tax account is created to be administered by the State Treasurer.

(B) At the end of each fiscal year and before August first a percentage, to be determined by the State Treasurer, must be withheld from those county areas collecting four hundred thousand dollars or more from that amount which exceeds four hundred thousand dollars from the tax authorized by Section 12-36-2630(3), and that amount must be distributed to assure that each county area receives a minimum of fifty thousand dollars. The amount withheld from those county areas collecting four hundred thousand dollars or more must be apportioned among the municipalities and the county in the same proportion as those units received quarterly remittances in Section 12-36-2630(3). If the total statewide collections from the local accommodations tax exceeds the statewide collections for the preceding fiscal year, then this fifty-thousand-dollar figure must be increased by a percentage equal to seventy-five percent of the statewide percentage increase in statewide collections for the preceding fiscal year. The difference between the fifty thousand dollars minimum and the actual collections within a county area must be distributed to the eligible units within the county area based on population as determined by the most recent United States census.

(C) At the end of each fiscal year and before August first, the State Treasurer shall distribute to each county area collecting more than fifty thousand dollars but less than four hundred thousand dollars an additional fifteen thousand dollars. If the total statewide collections from the local accommodations tax exceed the statewide collections for the preceding fiscal year, this fifteen-thousand-dollar figure must be increased by a percentage equal to seventy-five percent of the statewide percentage increase in statewide collections for the preceding fiscal year. This amount must be distributed in the same manner as the fifty thousand dollars in subsection (B). The amount paid those qualified county areas under this subsection must be paid from the account created under this section.

(D) The amount withheld in excess must be distributed to the county areas whose collections exceed four hundred thousand dollars based on the ratio of the funds available to the collections by each county area.

(E) The accommodations tax funds received by a municipality or county in county areas collecting fifty thousand dollars or less are not subject to the tourism-related provisions of this chapter.

(F) Two percent of the local accommodations tax levied pursuant to Section 12-36-2630(3) must be remitted quarterly and equally to the eleven agencies designated by law and regional

organizations to administer multi-county tourism programs in the state tourism regions as identified in the promotional publications of the South Carolina Department of Parks, Recreation and Tourism. This remittance is in addition to other funds that may be allocated to the agencies by local governments.

(G) The State Treasurer may correct misallocations to counties and municipalities from accommodations tax revenues by adjusting subsequent allocations, but these adjustments may be made only in allocations made in the same fiscal year as the misallocation.

SECTION 6-4-25. Advisory Committee; guidelines for expenditures; annual reports; reports to Accommodations Tax Oversight Committee.

(A) A municipality or county receiving more than fifty thousand dollars in revenue from the accommodations tax in county areas collecting more than fifty thousand dollars shall appoint an advisory committee to make recommendations on the expenditure of revenue generated from the accommodations tax. The advisory committee consists of seven members with a majority being selected from the hospitality industry of the municipality or county receiving the revenue. At least two of the hospitality industry members must be from the lodging industry where applicable. One member shall represent the cultural organizations of the municipality or county receiving the revenue. For county advisory committees, members shall represent the geographic area where the majority of the revenue is derived. However, if a county which receives more in distributions of accommodations taxes than it collects in accommodations taxes, the membership of its advisory committee must be representative of all areas of the county with a majority of the membership coming from no one area.

(B) A municipality or county and its advisory committee shall adopt guidelines to fit the needs and time schedules of the area. The guidelines must include the requirements for applications for funds from the special fund used for tourism-related expenditures. A recipient's application must be reviewed by an advisory committee before it receives funds from a county or municipality.

(C) Advisory committees shall submit written recommendations to a municipality or county at least once annually. The recommendations must be considered by the municipality or county in conjunction with the requirements of this chapter.

(D) Municipalities and counties annually shall submit to the South Carolina Accommodations Tax Oversight Committee:

(1) end-of-the-year report detailing advisory committee accommodations tax recommendations;

(2) municipalities or county's action following the recommendations;

(3) list of how funds from the accommodations tax are spent, except for the first twenty-five thousand dollars and five percent of the balance in Section 6-4-10(2) allocated to the general fund. The list is due before October first and must include funds received and dispersed during the previous fiscal year;

(4) list of advisory committee members noting the chairman, business address if applicable, and representation of the hospitality industry including the lodging industry and cultural interests.

(E) The regional tourism agencies in Section 6-4-20 annually shall submit reports on their budgets and annual expenditure of accommodations tax funds pursuant to this chapter to the Accommodations Tax Oversight Committee.

SECTION 6-4-30. Repealed by 2003 Act No. 96, Section 3.MM, eff June 18, 2003.

SECTION 6-4-35. Tourism Expenditure Review Committee.

(A) There is established the Tourism Expenditure Review Committee consisting of eleven members as follows:

- (1) one member appointed by the Speaker of the House;
- (2) one member appointed by the President Pro Tempore of the Senate;
- (3) the Director of the South Carolina Department of Parks, Recreation and Tourism, or his designee, ex officio;
- (4) eight members appointed by the Governor as follows:
 - (a) one member on the recommendation of the South Carolina Association of Tourism Regions;
 - (b) one member on the recommendation of the South Carolina Association of Convention and Visitors Bureaus;
 - (c) one member on the recommendation of the South Carolina Travel and Tourism Coalition;
 - (d) one member on the recommendation of the Municipal Association of South Carolina;
 - (e) one member on the recommendation of the South Carolina Association of Counties;
 - (f) one member on the recommendation of the Hospitality Association of South Carolina;
 - (g) one member on the recommendation of the South Carolina Arts Commission; and
 - (h) one member at large.

Appointed members shall serve for terms of four years and until their successors are appointed and qualify, except that of those first appointed by the Governor, four shall serve for a term of two years and the term must be noted on the appointment. Regardless of the date of appointment, all terms expire July first of the applicable year. Members shall serve without compensation but may receive the mileage, subsistence, and per diem allowed by law for members of state boards, committees, and commissions. Vacancies must be filled in the manner of original appointment for the unexpired portion of the term.

(B)(1)(a) The Tourism Expenditure Review Committee shall serve as the oversight authority on all questionable tourism-related expenditures and to that end, all reports filed pursuant to Section 6-4-25(D)(3) must be forwarded to the committee for review to determine if they are in compliance with this chapter. The municipality or county must be notified if an expenditure is questioned, and the committee may consider any further supporting information the municipality or county may provide. If the committee finds an expenditure to be in noncompliance, it shall certify the noncompliance to the State Treasurer, who shall withhold

the amount of the expenditure found in noncompliance from subsequent distributions in accommodations tax revenue otherwise due the municipality or county. An appeal from an action of the committee under this subitem lies with the Administrative Law Judge Division.

(b) If the committee determines that a municipality or county has failed to file the reports required pursuant to Section 6-4-25(D)(3), it may impose a fee of five hundred dollars a month or part of a month for each month the report is not filed, but not more than five thousand dollars. The committee shall certify the penalty to the State Treasurer, who shall withhold the amount of the penalty from subsequent distributions otherwise due the municipality or county. An appeal from an action of the committee under this subitem lies with the Administrative Law Judge Division.

(c) Allocations withheld must be reallocated proportionately to all other recipients.

(2) The committee has jurisdiction to investigate and research facts on written complaints submitted to it with regard to the appropriate tourism-related expenditures and resolve these complaints as provided in item (1) of this subsection.

(3) The committee shall forward copies of information submitted by the local governments and regional tourism agencies pursuant to Section 6-4-25 arising under the tourism provisions of this chapter to the Department of Parks, Recreation and Tourism, which shall publish an annual report on the information submitted.



TOWN OF HILTON HEAD ISLAND

Staff Report Memo

TO: Accommodations Tax Advisory Committee
FROM: Shena Smith, Finance Assistant
VIA: Marc Orlando, Town Manager
CC: Jeff Herriman, Interim Finance Director
DATE: March 28, 2023
SUBJECT: Consideration and Approval of the Revised Calendar Year 2024 Accommodations Tax Advisory Committee Meeting Dates

RECOMMENDATION:

The Accommodations Tax Advisory Committee will need to approve the revised Calendar Year 2024 meeting dates due to scheduling conflicts with two previously approved dates.

The Thursday, July 11th meeting has been changed to Thursday, **July 18, 2024**.

The Thursday, October 3rd meeting has been changed to Monday, **October 7, 2024**.

BACKGROUND:

During the Accommodations Tax Advisory Committee Meeting on September 28, 2023, committee members unanimously approved the meeting schedule for the 2024 year.

SUMMARY:

The revised dates for consideration and approval of the 2024 Accommodations Tax Advisory Committee schedule are as follows:

Thursday, July 18, 2024, and Monday, October 7, 2024

ATTACHMENTS:

1. Accommodations Tax Advisory Committee 2024 Schedule

ACCOMMODATIONS TAX ADVISORY COMMITTEE 2024 SCHEDULE

Thursday	April 4	9:00 a.m. – DMO Budget & Marketing Plan Presentation	Council Chambers
Thursday	July 18	9:00 a.m. – Swearing in of members & Election of officers	Council Chambers
Monday	August 5	8:00 a.m. – Grant Application available for electronic filing	www.hiltonheadislandsc.gov
Thursday	August 15	9:00 a.m. – ATAX Applicant Workshop	Council Chambers
Friday	September 6	4:00 p.m. – Application Deadline	www.hiltonheadislandsc.gov
Monday	October 7	9:00 a.m. – Preliminary Review of Applications	Council Chambers
Thursday	October 17	9:00 a.m. – 4:30 p.m. Applicant Hearings	Council Chambers
Thursday	October 24	9:00 a.m. – 4:30 p.m. Applicant Hearings	Council Chambers
Thursday	November 7	9:00 a.m. – Review and Recommendations	Council Chambers

Note: Town Council will meet to award the Accommodations Tax Grant, date TBD.

APPROVED: TBD