



Town of Hilton Head Island

Finance and Administrative Committee Meeting

Tuesday, April 9, 2024, 10:00 AM

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

The meeting can be viewed on the [Town's YouTube Channel](#), the [Beaufort County Channel](#), and Spectrum Channel 1304.

- 1. Call to Order**
- 2. Adoption of the Agenda**
- 3. Approval of the Minutes**
 - a. Regular Meeting Minutes of March 12, 2024
- 4. Appearance by Citizens:** Citizens who wish to speak on the matters being discussed during the meeting may do so by submitting the [Request to Speak form](#) no later than the day prior to the meeting.
- 5. Presentations and Recognitions**
 - a. Town of Hilton Head Island Fiscal Year 2024 Year to Date Update - Jeff Herriman, Treasurer
- 6. New Business**
 - a. Consideration of Award Recommendations for the Fiscal Year 2024-2025 Affiliated Agency Budget Request - Memory Matters - Jeff Herriman, Treasurer
 - b. Review of the 2023 Hilton Head Island Destination Marketing Organization (DMO) Industry Metrics Report - Angie Stone, Assistant Town Manager, Community Engagement
 - c. Consideration of a Resolution Recommending the 2024-2025 Destination Marketing Organization (DMO) Marketing Plan & Budget - Jeff Herriman, Treasurer
- 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
FINANCE AND ADMINISTRATIVE COMMITTEE
MEETING
Tuesday, March 12, 2024, 10:00 AM
Minutes

Call to Order

Chair Brown called the meeting to order at 10:00 a.m.

Committee Members present: Alex Brown, Chair, Ward 1; Steve Alfred, Ward 5; David Ames, Ward 3; Tamara Becker, Alternate, Ward 4

Committee Members absent: Glenn Stanford, Ward 6

Adoption of the Agenda

Mr. Ames moved to approve. Mr. Alfred seconded. Motion carried 4-0.

Approval of the Minutes

Regular Meeting Minutes of February 13, 2024

Mr. Ames moved to approve. Mr. Alfred seconded. Motion carried 4-0.

Appearance by Citizens

None.

New Business

Consideration of a Resolution to Authorize Submittal of the Community Development Block Grant Entitlement Program Annual Action Plan for Program Year 2024 to the U.S. Department of Housing and Urban Development - Marcy Benson, Senior Grants Administrator

Ms. Benson conducted a presentation. She explained in order to meet the HUD requirements public input must be solicited during the Annual Action Plan development process. From January 3 through January 27, 2024, a CDBG survey was posted on the Open Town Hall portal requesting input and comments from the public for funding needs and priorities. A public meeting was conducted on January 10, 2024. Three comments were submitted via the Open Town Hall portal, and no comments were submitted at the public meeting. Open Town Hall commenters ranked housing activities and other real property improvements as tied for the highest priority followed by public improvements receiving the

second highest ranking. Public facilities ranked third and public services ranked last. Project suggestions from commenters included: drainage maintenance and improvements across all major and minor arterial roads in Native Island neighborhoods, park investments in all Native Island neighborhoods, acquisition of land and development rights in Native Island neighborhoods, annual investments to preserve and improve quality of life in the historic Native neighborhoods, affordable workforce housing, support of the CCDC, and enforcement of existing housing codes.

The CDBG Five Year Consolidated Plan (2020 – 2024) was approved by HUD in July 2020 and amended in October 2020, January 2021, and August 2022. The Five-Year Consolidated Plan describes the planned uses for HUD allocated CDBG funds. Attached is a copy of the five-year project table from the most current Town of Hilton Head Island HUD approved Five Year Consolidated Plan. In program year one, based on HUD allowances due to the Covid-19 pandemic, all Town 2020 CDBG funds were allocated to public services and program administration. Five percent of the 2020 CDBG allocation was expended on program administration (\$41,262) and 95% (\$831,674) was distributed to public service organizations servicing low- and moderate-income residents, within the Town, to assist with response and recovery efforts to the COVID-19 pandemic. In program year two the Patterson Park project was selected for funding with 2021 CDBG funds. In program year three the Taylor Family Neighborhood Park project was selected for funding with 2022 CDBG funds. In program year four the Fords Shell Ring Park project was selected for funding with 2023 CDBG funds. In program year five, the project category included flexibility to select a project for the 2024 Annual Action Plan that could address public facilities & improvements, or housing activities, or economic development, or public services to benefit low-and-moderate income residents.

Based on CDBG program caps, the maximum amount allowed for public services is 15% of the 2024 CDBG allocation and the maximum amount allowed for program administration costs is 20% of the 2024 CDBG allocation. In past years the administrative costs have accounted for between 2% and 5% of the total CDBG allocation. If administrative costs are less than the allowed 20% cap and public services less than the allowed 15% cap this would allow for the majority of CDBG funds to be used for the Patterson Park project.

The draft 2024 Annual Action Plan details \$2,500 of the 2024 CDBG funds, to be used for program administration and the remaining 2024 funds to be used for the Patterson Park project. This park project is being recommended because the HUD-required environmental review has been completed for this project. With the environmental review complete this lets expenditures begin promptly upon executing the 2024 CDBG grant agreement allowing for compliance with timeliness requirements.

In order to meet the May 17, 2024, HUD submittal deadline, the draft 2024 Annual Action Plan was released for the required 30-day public comment period on February 14, 2024, and the comment period will close on March 15, 2024. Public comments received by the end of the comment period will be included in the final plan. Approval of the final 2024 Annual Action Plan by resolution is scheduled for the April 2, 2024, Town Council meeting.

Recommendation of the resolution to authorize the submittal of the Town's 2024 CDBG Annual Action Plan to HUD will allow the 2024 funding allocation to be used for the Patterson Park project. As of the writing of this memo HUD has not yet announced the 2024 CDBG funding allocation. However, the draft of the 2024 Annual Action Plan expresses the use of funds based on the 2023 CDBG allocation and includes language stating the funding allocation figures will be updated in accordance with the HUD allocation announcement when the final plan appears before Town Council for authorization to submit the plan to HUD.

Recommendation of the Patterson Park project is consistent with the current Five-Year Consolidated Plan, as well as several Our Plan goals, strategies, and tactics including Connected – Strategy 4.5 and Tactic 4.5.1; Inclusive – Goal 8 and Strategy 8.5; Priority Investment – Strategy 4.5; and Parks & Recreation – Goal 2, and Strategy 7.2. The CDBG program has been identified in the Our Plan Capital Improvement Program (CIP) section as a funding source for Town CIP projects.

Members of the Committee thanked Ms. Benson for her work regarding the Community Development Block Grant Entitlement Program Annual Action Plan. Chair Brown asked for public comment. There was none.

Mr. Ames moved to approve. Ms. Becker seconded. Motion carried 4-0.

Consideration of Award Recommendations for the Fiscal Year 2024-2025 Affiliated Agency Budget Requests - Jeff Herriman, Interim Finance Director

Mr. Herriman conducted a presentation noting Town Council voted on August 19, 2021, to establish a process and policy to accept and consider Affiliated Agency applications. Initial correspondence was sent to all current Town Affiliates on December 14, 2023, to inform them of the application opening date, January 2, 2024. In addition, the Town issued a press release on January 10, 2024, informing the public of this opportunity as well. The due date for all applications to be submitted in their entirety was on or before January 31, 2024, at 4:30 pm.

For reference, an Affiliated Agency is defined as an integral partner contracted by the Town to deliver services that benefit the public on the Town's behalf. The funding review process is conducted with a commitment to transparency and accountability, and is guided by the following criteria to assess the public purpose served by each project:

- Clear Public Goal or Benefit: Evaluation of the presence of a distinct goal or benefit to the public resulting from the proposed project.
- Primary Beneficiary: Assessment of the extent to which public or private parties will be primary beneficiaries of the project.

- Speculation Level: Consideration of the level of speculation inherent in the project to determine its feasibility and potential impact.
- Probability of Public Interest: Evaluation of the overall probability that the public interest will be served, and the degree to which it will be served.

As part of the Fiscal Year 2025 Affiliated Agency Application process, the Town has received eleven applications for the Finance & Administrative Committee to review. A funding request is also included pursuant to the MOU that was recently approved by the Town Council for the USCB Center for Lowcountry Hospitality Education. The MOU provides a two-year agreement for funding in the amount of \$235,000 for Fiscal Year 2025 and is subject to an inflation factor of three percent (3%) for Fiscal Year 2026.

A summary of all Affiliated Agency funding requests that were received for Fiscal Year 2025 are as follows:

Town of Hilton Head Island					
Affiliated Agency Funding Requests FY 2024 and FY 2025					
	FY 2024		FY 2025		
	Applicant Request	Adopted Budget	Applicant Request	F & A Recommendation	Adopted Budget
Hilton Head Island Recreation Association	\$ 1,123,766	\$ 1,123,766	\$ 1,167,366		
Coastal Discovery Museum	\$ 102,432	\$ 102,432	\$ 107,700		
Mitchelville Preservation Project	\$ 105,000	\$ 105,000	\$ 105,000		
USCB Event Management & Hospitality Training	\$ 238,985	\$ 238,985	\$ 235,000		
LRTA - Palmetto Breeze	\$ 249,911	\$ 277,842	\$ 253,595		
14th Circuit Solicitor - Multidisciplinary Court	\$ 50,000	\$ 50,000	\$ 50,000		
14th Circuit Solicitor - Career Criminal Program	\$ 118,500	\$ 118,500	\$ 118,500		
Beaufort County Economic Development Corporation	\$ 40,000	\$ 40,000	\$ 40,000		
Hilton Head Regional Habitat for Humanity	\$ 500,000		\$ -		
Beaufort Jasper Economic Opportunity Commission			\$ 100,000		
BlacQuity			\$ 75,000		
Memory Matters			\$ 50,000		
Sea Turtle Patrol Hilton Head Island		\$ -	\$ 73,480		
Total	\$ 2,528,594	\$ 2,056,525	\$ 2,375,641	\$ -	\$ -

To support this effort, and to assist in the preliminary development of the Town's Fiscal Year 2025 budget, staff have prepared an initial assessment of the anticipated revenues for the next fiscal year. Based upon this information, staff believes that revenues for the next year will remain flat at the previous Fiscal Year 2024 budgeted levels. Because of this, any additional funding that may be recommended by the Finance and Administrative Committee will have a corresponding impact on the Fiscal Year 2025 budget development.

The Finance and Administrative Committee is requested to review and recommend funding

website at www.hiltonheadislandsc.gov



TOWN OF HILTON HEAD ISLAND

Finance & Administrative Committee

TO: Finance and Administrative Committee
FROM: Jeff Herriman, Treasurer
CC: Marc Orlando, ICMA-CM, Town Manager
Josh Gruber, Deputy Town Manager
Adriana Burnett, Finance Director
DATE: April 2, 2024
SUBJECT: Financial Update

RECOMMENDATION:

Town staff recommends the Finance and Administrative Committee hear and discuss the financial update presented by the Treasurer.

BACKGROUND:

The Finance Department seeks to keep the Finance and Administrative Committee up to date on the Town's financial status and financial activity. The financial update has proven to be a useful method to keep the Finance and Administrative Committee informed and prepared to take any action that may be required.

SUMMARY:

The Treasurer will provide the Finance and Administrative Committee with an update on the Town's financial status and financial activity through February 2024.



TOWN OF HILTON HEAD ISLAND

Finance & Administrative Committee

TO: Finance & Administrative Committee
FROM: Jeff Herriman, *Treasurer*
VIA: Marc Orlando, *ICMA-CM, Town Manager*
CC: Josh Gruber, *Deputy Town Manager*
Adriana Burnett, *Finance Director*
DATE: April 2, 2024
SUBJECT: Fiscal Year 2025 Affiliated Agency Funding Request – Memory Matters

RECOMMENDATION:

The Finance & Administrative Committee is requested to review the request and corresponding presentation from Affiliated Agency applicant Memory Matters and recommend corresponding funding level to be included in the proposed Fiscal Year 2025 budget for Town Council's consideration.

BACKGROUND:

The Finance & Administrative Committee met on March 12, 2024, and reviewed the requests and presentations for Affiliated Agency applicants. The Committee voted unanimously to recommend funding requests for nine applicants be included in the FY2025 Budget proposal that will be considered by Town Council on May 7, 2024.

Three organizations, including Memory Matters, were not recommended for funding at this time. Memory Matters did not appear at the meeting on March 12, 2024. On March 14, Stacey Floyd, Development Director for Memory Matters contacted Staff to follow-up on the Affiliated Agency application that Memory Matters submitted on January 26, 2024.

After the February 13, 2024, Finance & Administrative meeting, Staff sent an email to all Affiliated Agency applicants requesting that each applicant make a presentation at the March 12, 2024, meeting. An email was sent to Memory Matters with this request; however, an incorrect email address was used. Staff did not receive a bounce back message notifying that an incorrect email address was used. The Town's IT staff researched and determined that the email address used was valid and had been accepted by a recipient; however, not the recipient that was intended at Memory Matters.

Since the error was on the Town's part, Memory Matters will be provided with the opportunity to make a presentation at the Committee meeting on April 9, 2024.

For reference, an Affiliated Agency is defined as an integral partner contracted by the Town to deliver services that benefit the public on the Town's behalf. The funding review process is conducted with a commitment to transparency and accountability, and is guided by the following criteria to assess the public purpose served by each project:

- Clear Public Goal or Benefit: Evaluation of the presence of a distinct goal or benefit to the public resulting from the proposed project.
- Primary Beneficiary: Assessment of the extent to which public or private parties will be primary beneficiaries of the project.
- Speculation Level: Consideration of the level of speculation inherent in the project to determine its feasibility and potential impact.
- Probability of Public Interest: Evaluation of the overall probability that the public interest will be served, and the degree to which it will be served.

A summary of all Affiliated Agency funding requests that were received for Fiscal Year 2025 and the Committee's recommendations from the March 12, 2024, meeting are as follows:

Town of Hilton Head Island					
Affiliated Agency Funding Requests FY 2024 and FY 2025					
	FY 2024		FY 2025		
	Applicant Request	Adopted Budget	Applicant Request	F & A Recommendation	Adopted Budget
Hilton Head Island Recreation Association	\$ 1,123,766	\$ 1,123,766	\$ 1,167,366	\$ 1,167,366	
Coastal Discovery Museum	\$ 102,432	\$ 102,432	\$ 107,700	\$ 107,700	
Mitchelville Preservation Project	\$ 105,000	\$ 105,000	\$ 105,000	\$ 105,000	
USCB Event Management & Hospitality Training	\$ 238,985	\$ 238,985	\$ 235,000	\$ 235,000	
LRTA - Palmetto Breeze	\$ 249,911	\$ 277,842	\$ 253,595	\$ 253,595	
14th Circuit Solicitor - Multidisciplinary Court	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	
14th Circuit Solicitor - Career Criminal Program	\$ 118,500	\$ 118,500	\$ 118,500	\$ 118,500	
Beaufort County Economic Development Corporation	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	
Hilton Head Regional Habitat for Humanity	\$ 500,000		\$ -	\$ -	
Beaufort Jasper Economic Opportunity Commission			\$ 100,000		
BlacQuity			\$ 75,000		
Memory Matters			\$ 50,000		
Sea Turtle Patrol Hilton Head Island		\$ -	\$ 73,480	\$ 73,480	
Total	\$ 2,528,594	\$ 2,056,525	\$ 2,375,641	\$ 2,150,641	\$ -

To support this effort, and to assist in the development of the Town's Fiscal Year 2025 budget, staff have prepared an assessment of the anticipated revenues for the next fiscal year. Based upon this information, staff believes that revenues for the next year will remain flat at the previous Fiscal Year 2024 budgeted levels. Because of this, any additional funding that may be recommended by the Finance and Administrative Committee will have a corresponding impact on the Fiscal Year 2025 budget development.

SUMMARY:

The Finance and Administrative Committee is requested to review and recommend funding level for Fiscal Year 2025 Affiliated Agency Application for Memory Matters. This recommendation along with the recommendations from the March 12, 2024, meeting will be included in the Fiscal Year 2025 budget proposal that will be considered by the Town Council on May 7, 2024.

ATTACHMENTS:

1. Spreadsheet of Fiscal Year 2025 Affiliated Agency Funding Requests and Finance & Administrative Committee recommendations from the March 12, 2024, meeting.
2. Fiscal Year 2025 Affiliated Agency Application – Memory Matters
3. Memo regarding approved Affiliated Agency Town Funding Standardization Process (approved by Town Council on August 19, 2021)

Attachment 1

Town of Hilton Head Island
Affiliated Agency Funding Requests FY 2024 and FY 2025

	FY 2024		FY 2025		
	Applicant Request	Adopted Budget	Applicant Request	F & A Recommendation	Adopted Budget
Hilton Head Island Recreation Association	\$ 1,123,766	\$ 1,123,766	\$ 1,167,366	\$ 1,167,366	
Coastal Discovery Museum	\$ 102,432	\$ 102,432	\$ 107,700	\$ 107,700	
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14th Circuit Solicitor - Career Criminal Program	\$ 118,500	\$ 118,500	\$ 118,500	\$ 118,500	
Beaufort County Economic Development Corporation	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	
Hilton Head Regional Habitat for Humanity	\$ 500,000		\$ -	\$ -	
Beaufort Jasper Economic Opportunity Commission			\$ 100,000		
BlacQuity			\$ 75,000		
Memory Matters			\$ 50,000		
Sea Turtle Patrol Hilton Head Island		\$ -	\$ 73,480	\$ 73,480	
Total	\$ 2,528,594	\$ 2,056,525	\$ 2,375,641	\$ 2,150,641	\$ -

Fiscal Year 2025

Affiliated Agency Grant Application

Organization Name: Memory Matters

Project Name: Memory Matters Programs and Services

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

Fiscal Year 2025

Affiliated Agency Grant Application

Date Received: 01/26/2024

Time Received: 03:25 PM

By: Online Submittal

Applications will not be accepted if submitted after 4 pm on January 31, 2024

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Memory Matters

Project/Event Name: Memory Matters Programs and Services

Contact Name: Stacy Floyd

Title: Development Director

Address: 117 William Hilton Parkway, Hilton Head Island, SC 29926

Email Address:

stacy@mymemorymatters.org

Contact Phone: 843-842-6688

Total Budget: \$1,461,724.00

Grant Amount Requested:
\$50,000.00

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

Funding is requested to support Memory Matters education/wellness events and programs for families facing Alzheimer's Disease and Related Dementia (ADRD) in the Town of Hilton Head. The 2023-2025 SC Statewide Plan to Address ADRD states, "There are an estimated 197,000 caregivers in South Carolina providing almost 300 million hours of unpaid care. That unpaid care provided by family members or friends is valued at over \$4.4 billion. Caregivers of people with dementia indicate substantial financial, emotional, and physical health difficulties." Providing education for caregivers and comprehensive dementia care and support will directly impact the caregiver and individual living with ADRD.

B. DESCRIPTION OF OPERATIONS:

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

Memory Matters is the only local non-profit organization serving individuals and families affected by Alzheimer's Disease and Related Dementias (ADRD) in southern Beaufort County. Caring for a loved one diagnosed with ADRD is overwhelming for most families who don't have the coping skills to manage the journey on their own. The cornerstone of Memory Matter's mission is to provide support and services for family caregivers and individuals affected by ADRD. For 26 years, Memory Matters has provided this support in Hilton Head and surrounding communities through its programs and services including free memory screenings, community and caregiver education, support groups, respite care day programs and care planning. Beaufort County has seen a 354% increase in documented dementia cases since 2000. (SC Alzheimer's Disease Registry) In 2023, Memory Matters served more than 5,000 Beaufort and Jasper County residents through community programs, education and outreach efforts. This grant would provide public function to the Town by creating an opportunity for Memory Matters to offer free baseline memory screenings which can lead to earlier diagnosis and access to treatments and services. This program will also increase access to underserved Hilton Head Island residents by providing fee assistance to attend dementia support programs and services. It will help Memory Matters reach more families affected by ADRD and provide comprehensive dementia resources, guidance, support, programs and services decreasing burden on healthcare and emergency services, ultimately creating a healthier community.

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

Grant funds would be used to provide fee assistance for Hilton Head families in need of financial support to attend the Memory Care Adult Day Respite Program. We assist with fees up to 90% and in some cases 100%. The Memory Care Adult Day Respite Program provides participants with ADRD a social day with interactive activities and a nutritious meal while the caregiver receives valuable respite time for self-care, medical and legal appointments, rest, etc. Funds will also support education and outreach programs such as The Savvy Caregiver, Friday's for Caregivers, community education events, and support groups. These programs are designed to provide knowledge and skills to support caregivers and help improve quality of life for both the caregiver and individual with ADRD. Funds will help provide free memory screenings in the Town of Hilton Head. Free baseline memory screenings are often our initial contact with a family in need of guidance and resources as they navigate their journey with ADRD and their physician. Memory Matters builds relationships and assists families throughout the disease process. Free Memory Screenings lead to earlier diagnosis and access to treatments and resources. Community education and outreach are also important components of this project to bring information to the community about Memory Matters programs and services and to provide hope and support for families affected by ADRD living in the Town of Hilton Head. We seek funding year round through private donations, foundations, grants, and events to support the remainder of the project budget.

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)*

Partial funding may reduce opportunities for residents with ADRD to benefit from programs such as participating in the fee assistance program to attend the Memory Care Adult Day Respite Program. If partial funding is received it could reduce the number of days a participant can attend the respite program. We will not turn anyone away, but it may mean the difference of attending one day per week

instead of two, until more funding is secured. We will continue providing community and caregiver education, however, partial funding may mean less opportunities to bring the services into the community.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

The expected public benefit Memory Matters will make through this project is to improve the lives of vulnerable individuals affected by ADRD and their caregivers by increasing access to free memory screenings, dementia care support and resources for the underserved in our community and raise awareness throughout the community about our programs and services within the Town. We will increase collaboration and partnerships with other non-profits, faith-based, and health organizations serving low-income communities. By tracking and reporting data collected during this project we will learn more about the needs for dementia care in the underserved populations in our area.

5. Additional comments. *(250 words or less)*

Memory Matters evidence based programs are a proven resource for Hilton Head Island residents faced with ADRD. They improve quality of life for seniors, increase self-efficacy in managing one's health and increase independence. Memory Matters also improves the mental health of caregivers and has positive effects on depression by offering the Savvy Caregiver, a program designed to empower caregivers with skills and knowledge to help them better care for themselves and their loved one with ADRD.

C. FUNDING:

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

Memory Matters seeks and receives funding year-round through various sources including individual donations, special events, program fees and grants. Memory Matters prepares financially for contingencies to maintain programs and services for those affected by ADRD during difficult times such as recessions, natural disasters like hurricanes and most recently, the Covid Pandemic. We have weathered all these situations over the past 26 years and after each occurrence have been able to continue to grow programs and services driven by increased demand and need in our HHI community.

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

1%	Government Sources	73%	Private Contributions, Donations and Grants
3%	Corporate Support, Sponsors		Membership, Dues, Subscriptions
23%	Ticket Sales, or Sales and Services		Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. *(100 words or less)*

Church Mouse Thrift Store-\$1,660 received.

Hilton Head Fire Department-\$5,000 received.

Community Foundation of the Lowcountry-\$44,000 received.

Women in Philanthropy-\$25,000 submitted.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

Church Mouse Thrift Store-\$1,660 received.

Hilton Head Fire Department-\$5,000 received.

Community Foundation of the Lowcountry-\$44,000 received.

Women in Philanthropy-\$25,000 submitted.

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: January 1, 2024 End Month: December 31, 2024

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

A Current Profit & Loss Report has been attached to this Application.

Profit and Loss Years Provided:

2022

2023

3. The previous two years and current year **balance sheets**.

A Current Balance Sheet has been attached to this Application.

Balance Sheet Years Provided:

2022

2023

E. MEASURING EFFECTIVENESS:

1. List any award amounts received in fiscal year 2023 and/or 2024.

2023	\$25,000.00	Mobile MoCA's-Free Baseline Memory Screening for Underserved Communities
2023	\$3,000.00	Community Education and Outreach
2023	\$2,000.00	2023 Memories Do Matter Speaker Series
2023	\$10,000.00	Savvy Caregiver Program-Caregiver Education
2023	\$5,000.00	Savvy Caregiver Program-Caregiver Education
2023	\$18,000.00	Memory Care Day Program Meals
2023	\$5,000.00	Volunteer Support
2023	\$20,000.00	Fee Assistance to Attend the Memory Care Day Program
2023	\$15,000.00	Memory Care Day Program Expansion in Bluffton
2023	\$7,500.00	Fee Assistance to Attend the Memory Care Day Program
2023	\$2,000.00	Memory Care Day Program
2023	\$13,000.00	Memory Care Day Program
2023	\$2,500.00	Community Education and Outreach
2023	\$44,000.00	Memory Care Day Program
2023	\$10,000.00	Community Education and Outreach

2. How were those funds used? To what extent were the objectives achieved?
(200 words or less)

The funds above were used to support the delivery of Memory Matters Programs and Services and connect resources and support with

families affected by ADRD in our local community.

In 2023 Memory Matters was able to achieve the following:

- 458 Free base-line Memory Screenings (MoCA's) were administered by staff.
- 255 MoCA's were conducted the in Greater Beaufort County Community and 203 were conducted on HHI.
- More than 200 caregiver resource meetings were conducted.
- More than 100 community education presentations were conducted.
- 135 attended Brain Boosters classes.
- 65 individuals attended the Savvy Caregiver training program.
- 111 individuals participated in support groups in 2023.
- More than 5,000 community members were reached through community education, programs, and services.
- 75 Individuals were served in the Memory Care Adult Day Respite Program compared to

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

These grants had a significant impact in the community by providing support for Memory Matters to increase awareness and access to Memory Matters resources in low-income communities in our geographic area. Offering free base-line memory screenings in the community helped us reduce travel barriers and assist with establishing trust in underserved communities that are not as familiar with Memory Matters services. We used social media and traditional advertising to help raise awareness for the programs and services Memory Matters offers. This project helped Memory Matters increase access to dementia care support and resources in our community and raised

awareness throughout the community about our programs and services.

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

Memory Matters tracks attendance in all programs and classes. We evaluate and measure effectiveness based on feedback from participants, caregivers, volunteers, community partners, and staff members. We have also implemented an evidence-based software program (BRI Care Consultation) which will help us with tracking overall activity and follow up with individuals after initial contact often from taking a MoCA and help us build relationships, offer support and resources in rural communities by eliminating the transportation barrier, and much more.

F. EXECUTIVE SUMMARY

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

An Effectiveness Measurement spreadsheet has been attached to this application.

Signature: Stacy Floyd

Title/Position: Development Director

Mailing Address: 117 William Hilton Parkway, Hilton Head Island, SC 29926

Email Address: stacy@mymemorymatters.org

Phone Number: 843-842-6688

	2024 Approved Budget
GROSS REVENUE	
PROGRAM FEES	\$356,611.00
Compass-HHI	\$202,356.00
Compass-Bluffton	\$48,618.00
Connections-HHI	\$51,840.00
Connections-Bluffton/2.0	\$17,280.00
Registration Fee	\$2,640.00
Private Counseling	
Brain Boosters	\$14,157.00
Caregiver Partner Program	\$1,800.00
Savvy Caregivers	\$7,920.00
Music Therapy	
Caregiver Series (Brain Health Summit)	\$10,000.00
DONATIONS	
Unrestricted	\$400,000.00
Annual Appeal	\$315,000.00
Birdies for Charity	\$40,000.00
Contributions – General	\$24,000.00
Memorials/ Honorariums	\$19,000.00
Minot Endowment / CFL	\$2,000.00
Misc income (removing)	\$0.00
Special Events:	\$308,500.00
Social Event (Gala)	\$265,000.00
5K/10K Move Your Mind	\$43,500.00
Temp Restricted (Grants)	\$348,000.00
Grants	\$255,500.00
Individual Rest Major Gifts	\$92,500.00
TOTAL GROSS REVENUE:	\$1,413,111.00
EXPENSES	2024 Budget
PROGRAM – Direct	\$260,986.90
Participant Supplies (art, tools, games)	\$34,000.00
Program Enrichment (yoga, museum, etc.)	\$9,000.00
Contract Labor (C.N.A., etc....)	\$47,661.50
IT Support	\$4,860.00
IT Subscriptions	\$11,102.40
Technology Equipment	\$10,000.00
Catered Meals	\$32,055.00
Pantry Items/Snacks	\$3,900.00
Brain Boosters	\$600.00
Vol Support	\$3,000.00
Cleaning/Laundry Items	\$2,400.00
Professional Cleaning-Reg	\$10,200.00
Professional Ceaning-Extra	\$1,000.00
Water / Sewer	\$840.00
Electric	\$9,600.00
Dumpster	\$3,000.00
Facility Maintenance	\$50,000.00
Security	\$1,000.00
Landscaping	\$3,900.00

	2024 Approved Budget
HVAC	\$3,000.00
Telephone & Internet	\$12,780.00
Caregiver Series	\$7,088.00
HUMAN RESOURCES	\$994,750.00
Payroll/Salaries	\$840,000.00
Employer Taxes	\$58,800.00
Insurance - Health	\$60,000.00
Insurance - Workers Comp	\$2,100.00
Retirement Plan charges	\$1,300.00
401K Match	\$9,850.00
Continuing Education/Staff Dev	\$8,400.00
HR & Payroll Fees	\$14,300.00
ED Search / Relocation	\$0.00
Com Ed / Marketing	\$21,610.00
Caregivers 1ST Fridays	\$660.00
Media (was Marketing)	\$12,800.00
Community Presentations	\$1,800.00
Website Support	\$1,350.00
Promotional Materials	\$5,000.00
DEVELOPMENT EXPENSES	\$48,050.00
Annual Appeal Fund	\$5,000.00
Social Event (Gala)	\$30,000.00
Donor Cultivation	\$1,800.00
5k/10k Move your Mind	\$6,250.00
Donor software license	\$5,000.00
ADMINISTRATION	\$136,326.79
Accounting fees (Jill Locker)	\$0.00
Audit fees	\$8,200.00
Bank Service Charges	\$15,000.00
Copier	\$6,600.00
Insurance	\$35,000.00
Rent	\$49,826.79
Office Supplies	\$6,000.00
Dues and Subscriptions	\$3,000.00
License and Registration	\$2,000.00
Property Taxes	\$0.00
Travel Expenses/ cell phones	\$3,500.00
Postage and Shipping	\$3,000.00
Printing	\$1,200.00
Hub move	\$3,000.00
Contingency Fund	
TOTAL EXPENSES	\$1,461,723.69
Gross Revenue	\$1,413,111.00
Operating Expenses	\$1,461,723.69
EBITDA	-\$48,612.69

Memory Matters

Profit and Loss

January 1-24, 2024

	TOTAL
Income	
4000 Revenue	
4100 Program Fees	
4110 Compass	0.00
4112 Compass HH / 5.0	14,335.00
4114 Compass Bluff / 3.5	3,030.00
Total 4110 Compass	17,365.00
4115 Connections	
4116 Connections HH / 2.0	4,200.00
4118 Connections Bluff / 2.0	2,300.00
Total 4115 Connections	6,500.00
4120 Brain Boosters	792.00
4122 Registration Fee	75.00
4150 Savvy	396.00
4265 Caregiver Series	1,450.00
Total 4100 Program Fees	26,578.00
5000 Donations	
5100 Unrestricted Gifts	
5140 Annual	50,375.00
5165 Legacy/Memorials	2,020.00
Total 5100 Unrestricted Gifts	52,395.00
5200 Unrestricted Special Events	
5190 Gala	4,500.00
Total 5200 Unrestricted Special Events	4,500.00
5400 Grants / Major Gifts	
5440 Temp Rest	
5450 Temp Rest Grants	27,910.00
Total 5440 Temp Rest	27,910.00
5470 Major Gifts	
5475 Major Gifts Temp Rest	26,698.97
Total 5470 Major Gifts	26,698.97
Total 5400 Grants / Major Gifts	54,608.97
Total 5000 Donations	111,503.97
Total 4000 Revenue	138,081.97
Unapplied Cash Payment Income	200.00
Total Income	\$138,281.97
GROSS PROFIT	\$138,281.97

	TOTAL
Expenses	
6000 Operating Expenses	
6100 Program-Direct	
6115 Program Enrichment	350.00
6178 C.N.A.	1,841.50
6185 Electric	764.00
6205 Facility Maintenance	45.00
6210 Security	105.00
6215 Pantry Items/Snacks	41.08
6220 Catered Meals	1,299.40
6235 HVAC	129.00
6240 Professional Cleaning - Regular	738.00
6255 Water / Sewer	59.44
6275 Telephone/Internet	1,058.19
Total 6100 Program-Direct	6,430.61
6400 Human Resources	
6410 Payroll - Salaries	30,611.02
6425 Employer Taxes	2,190.38
6440 Insurance - Health	2,493.45
6465 HR/Payroll Fees	521.16
6470 Insurance - Workers Comp	64.28
6505 Retirement Match	387.68
Total 6400 Human Resources	36,267.97
6700 Comn Ed/Brain Wellness	
6790 Media	263.06
Total 6700 Comn Ed/Brain Wellness	263.06
7000 Development Direct	
7040 Gala Expense	598.25
Total 7000 Development Direct	598.25
7400 Administrative	
7015 Bank Service Charges	1,273.00
7480 Copier	498.38
7785 Travel Expense	170.00
Total 7400 Administrative	1,941.38
Total 6000 Operating Expenses	45,501.27
Misc expenses	1,226.50
Total Expenses	\$46,727.77
NET OPERATING INCOME	\$91,554.20
NET INCOME	\$91,554.20

Memory Matters

Profit and Loss

January - December 2023

	TOTAL
Income	
4000 Revenue	
4100 Program Fees	
4110 Compass	
4112 Compass HH / 5.0	168,636.00
4113 Compass Bluff / 2.0	2,335.00
4114 Compass Bluff / 3.5	28,050.00
Total 4110 Compass	199,021.00
4115 Connections	
4116 Connections HH / 2.0	58,450.00
4118 Connections Bluff / 2.0	20,150.00
Total 4115 Connections	78,600.00
4120 Brain Boosters	14,060.00
4122 Registration Fee	3,025.00
4125 Private Counseling	29,327.75
4140 Caregiver Partner Program	1,470.00
4150 Savvy	6,435.00
4265 Caregiver Series	4,960.00
Total 4100 Program Fees	336,898.75
5000 Donations	
5100 Unrestricted Gifts	
5140 Annual	318,501.38
5160 Contributions - Individuals/Gro	42,468.17
5165 Legacy/Memorials	18,066.00
5170 Minot Endowment	2,100.00
5240 Birdies for Charity	40,560.78
5250 Misc. Income	0.00
Total 5100 Unrestricted Gifts	421,696.33
5200 Unrestricted Special Events	
4290 5K/10K	46,502.00
5190 Gala	266,644.00
Total 5200 Unrestricted Special Events	313,146.00
5400 Grants / Major Gifts	
5440 Temp Rest	
5450 Temp Rest Grants	285,950.00
5460 Temp Rest Donations	7,348.12
Total 5440 Temp Rest	293,298.12
5470 Major Gifts	
5480 Major Gifts Unrestricted	89,678.38
Total 5470 Major Gifts	89,678.38

	TOTAL
Total 5400 Grants / Major Gifts	382,976.50
Total 5000 Donations	1,117,818.83
Total 4000 Revenue	1,454,717.58
5800 Investment Income	
5810 Investment Income - Capital	43,891.00
5830 Investment Income - Endowment	115,372.83
5840 Investment Income - Operating	-12,124.95
5850 Fidelity Income	16,834.71
Total 5800 Investment Income	163,973.59
Unapplied Cash Payment Income	5,000.00
Total Income	\$1,623,691.17
GROSS PROFIT	\$1,623,691.17
Expenses	
6000 Operating Expenses	
6100 Program-Direct	
6110 Participant Supplies	7,795.44
6115 Program Enrichment	7,869.50
6125 IT Support	10,682.50
6130 IT Subscriptions	18,648.46
6135 Technology / Equipment	9,461.19
6170 Cleaning/Laundry Supplies	2,402.81
6178 C.N.A.	28,906.50
6180 Dumpster	3,219.55
6185 Electric	9,085.37
6205 Facility Maintenance	12,981.73
6210 Security	872.35
6215 Pantry Items/Snacks	4,205.18
6220 Catered Meals	27,629.79
6226 Landscaping	3,228.00
6230 Professional Cleaning - Extras	600.00
6235 HVAC	9,579.90
6240 Professional Cleaning - Regular	9,008.95
6252 Volunteer Expense	1,543.10
6255 Water / Sewer	757.63
6275 Telephone/Internet	12,624.71
6725 Brain Boosters	165.67
Total 6100 Program-Direct	181,268.33
6400 Human Resources	
6410 Payroll - Salaries	809,598.64
6425 Employer Taxes	58,784.06
6440 Insurance - Health	40,164.04
6465 HR/Payroll Fees	13,158.40
6470 Insurance - Workers Comp	1,700.19
6505 Retirement Match	10,048.49
6590 Continuing Education/Staff Dev	9,872.36
Total 6400 Human Resources	943,326.18

	TOTAL
6700 Comn Ed/Brain Wellness	
6715 1st Fridays	74.20
6785 Community Outreach	1,529.86
6790 Media	21,417.35
6795 Website Support	1,334.53
6800 Promotional Items	2,545.04
Total 6700 Comn Ed/Brain Wellness	26,900.98
7000 Development Direct	
6777 Brain Health Summit	7,939.80
7010 Annual Fund	4,621.53
7020 Donor Cultivation	439.90
7025 Donor Software License	5,863.65
7040 Gala Expense	59,332.53
7290 5K/10K Expenses	5,913.47
Total 7000 Development Direct	84,110.88
7400 Administrative	
7015 Bank Service Charges	14,623.18
7380 Postage and Shipping	3,228.32
7440 Accounting fees	41.75
7470 Audit Fees	8,200.00
7480 Copier	6,235.16
7490 Insurance	34,673.32
7680 Office Supplies	5,627.58
7710 Dues and Subscriptions	2,704.43
7740 License and Registration	2,051.20
7770 Property taxes	2,997.10
7775 Printing	910.96
7780 Rent	1,735.00
7785 Travel Expense	3,159.57
Total 7400 Administrative	86,187.57
Total 6000 Operating Expenses	1,321,793.94
8000 Other Expenses	
7560 Investment Fees - Capital	1,893.54
7620 Investment Fees - Endowment	-32,467.52
7650 Investment Fees -Operating	4,478.50
8010 Depreciation	74,328.39
Total 8000 Other Expenses	48,232.91
Total Expenses	\$1,370,026.85
NET OPERATING INCOME	\$253,664.32
NET INCOME	\$253,664.32

Memory Matters

Profit and Loss

January - December 2022

	TOTAL
Income	
4000 Revenue	
4100 Program Fees	
4110 Compass	135,439.75
4115 Connections	50,360.00
4120 Brain Boosters	9,555.00
4122 Registration Fee	2,875.00
4125 Private Counseling	45,950.25
4140 Caregiver Partner Program	1,610.00
4150 Savvy	3,564.00
4265 Caregiver Series	22,190.00
Total 4100 Program Fees	271,544.00
5000 Donations	
5100 Unrestricted Gifts	
5140 Annual	305,283.68
5160 Contributions - Individuals/Gro	52,721.38
5165 Legacy/Memorials	34,875.17
5170 Minot Endowment	2,000.00
5240 Birdies for Charity	27,233.30
5250 Misc. Income	-313.99
Total 5100 Unrestricted Gifts	421,799.54
5200 Unrestricted Special Events	
4290 5K/10K	35,411.09
5190 Gala	163,048.16
4270 Community Events	440.00
5197 Arts and Appetizers	3,933.00
Total 5190 Gala	167,421.16
Total 5200 Unrestricted Special Events	202,832.25
5400 Grants / Major Gifts	343,133.54
Total 5000 Donations	967,765.33
Total 4000 Revenue	1,239,309.33
5800 Investment Income	
5810 Investment Income - Capital	-71,517.97
5830 Investment Income - Endowment	-96,149.02
5840 Investment Income - Operating	-115,735.27
5850 Fidelity Income	-3,183.19
Total 5800 Investment Income	-286,585.45
Total Income	\$952,723.88
GROSS PROFIT	\$952,723.88

	TOTAL
Expenses	
6000 Operating Expenses	
6100 Program-Direct	
6110 Participant Supplies	381.96
6115 Program Enrichment	3,374.55
6125 IT Support	9,282.60
6130 IT Subscriptions	16,207.26
6135 Technology / Equipment	10,722.18
6170 Cleaning/Laundry Supplies	839.48
6178 C.N.A.	18,107.25
6180 Dumpster	2,555.09
6185 Electric	8,831.65
6205 Facility Maintenance	7,352.54
6210 Security	517.20
6215 Pantry Items/Snacks	1,548.65
6220 Catered Meals	15,641.51
6226 Landscaping	3,580.00
6235 HVAC	1,080.00
6240 Professional Cleaning - Regular	9,902.94
6252 Volunteer Expense	795.23
6255 Water / Sewer	995.40
6275 Telephone/Internet	11,275.42
6725 Brain Boosters	338.49
Total 6100 Program-Direct	123,329.40
6400 Human Resources	
6410 Payroll - Salaries	763,642.54
6425 Employer Taxes	56,777.12
6440 Insurance - Health	29,431.16
6465 HR/Payroll Fees	13,243.86
6470 Insurance - Workers Comp	1,635.25
6500 Retirement Plan	1,300.00
6505 Retirement Match	10,062.53
6590 Continuing Education/Staff Dev	7,932.65
6595 ED Search & Relocation	49,985.67
Total 6400 Human Resources	934,010.78
6700 Comn Ed/Brain Wellness	
6715 1st Fridays	292.50
6785 Community Outreach	1,126.93
6790 Media	7,283.35
6795 Website Support	717.74
6800 Promotional Items	2,648.55
Total 6700 Comn Ed/Brain Wellness	12,069.07

	TOTAL
7000 Development Direct	
6777 Brain Health Summit	18,526.17
7010 Annual Fund	4,773.08
7020 Donor Cultivation	376.52
7025 Donor Software License	3,635.00
7040 Gala Expense	21,514.48
6779 Community Events Expenses	1,225.72
7045 Arts & Apps	744.33
Total 7040 Gala Expense	23,484.53
7290 5K/10K Expenses	7,407.30
Total 7000 Development Direct	58,202.60
7400 Administrative	
7015 Bank Service Charges	14,559.68
7380 Postage and Shipping	2,469.19
7440 Accounting fees	268.75
7470 Audit Fees	7,800.00
7480 Copier	5,937.70
7490 Insurance	25,369.64
7680 Office Supplies	3,564.78
7710 Dues and Subscriptions	1,312.14
7740 License and Registration	847.85
7770 Property taxes	1,569.77
7775 Printing	2,444.18
7780 Rent	9,617.00
7785 Travel Expense	2,740.78
Total 7400 Administrative	78,501.46
Total 6000 Operating Expenses	1,206,113.31
8000 Other Expenses	
7560 Investment Fees - Capital	1,982.51
7620 Investment Fees - Endowment	2,932.38
7650 Investment Fees -Operating	5,037.70
8010 Depreciation	73,412.88
Total 8000 Other Expenses	83,365.47
Total Expenses	\$1,289,478.78
NET OPERATING INCOME	\$ -336,754.90
Other Expenses	
Reconciliation Discrepancies-1	-7.00
Total Other Expenses	\$ -7.00
NET OTHER INCOME	\$7.00
NET INCOME	\$ -336,747.90

Memory Matters

Balance Sheet

As of January 24, 2024

		TOTAL
ASSETS		
Current Assets		
Bank Accounts		
1020 South State Bank	192,691.14	
Petty Cash	356.04	
Total Bank Accounts	\$193,047.18	
Accounts Receivable		
1150 Grants Receivable	55,500.00	
Total Accounts Receivable	\$55,500.00	
Other Current Assets		
Undeposited Funds	400.00	
Total Other Current Assets	\$400.00	
Total Current Assets	\$248,947.18	
Fixed Assets		
1510 Building & Improvements	1,205,302.13	
1520 Furniture & equipment	139,481.45	
1530 Land & Improvements	601,862.31	
1540 Intangible Assets	31,310.00	
1580 Accumulated Depreciation	-795,052.04	
Total Fixed Assets	\$1,182,903.85	
Other Assets		
1705 Fidelity	516,094.73	
1750 Morgan Stanley-Operating Reserve 069	699,766.18	
1760 Morgan Stanley-Capital Reserve 067	254,176.97	
1770 Morgan Stanley - Endowment Fund - 068	320,499.58	
Total Other Assets	\$1,790,537.46	
TOTAL ASSETS	\$3,222,388.49	
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3100 Restricted Endowment Fund	202,770.21	
3110 Temp.Restricted Bldg. Fund	170,605.84	
3120 Temporarily Restricted Grants	92,121.80	
3130 Unrestricted Fund	2,221,789.62	
Opening Bal Equity	0.00	
Unrestrict (retained earnings)	442,570.05	
Net Income	92,530.97	
Total Equity	\$3,222,388.49	
TOTAL LIABILITIES AND EQUITY	\$3,222,388.49	

Memory Matters

Balance Sheet

As of December 31, 2023

		TOTAL
ASSETS		
Current Assets		
Bank Accounts		
1020 South State Bank		250,560.17
Petty Cash		356.04
Total Bank Accounts		\$250,916.21
Accounts Receivable		
1150 Grants Receivable		55,500.00
Total Accounts Receivable		\$55,500.00
Other Current Assets		
Undeposited Funds		0.00
Total Other Current Assets		\$0.00
Total Current Assets		\$306,416.21
Fixed Assets		
1510 Building & Improvements		1,205,302.13
1520 Furniture & equipment		139,481.45
1530 Land & Improvements		601,862.31
1540 Intangible Assets		31,310.00
1580 Accumulated Depreciation		-795,052.04
Total Fixed Assets		\$1,182,903.85
Other Assets		
1705 Fidelity		366,094.73
1750 Morgan Stanley-Operating Reserve 069		699,766.18
1760 Morgan Stanley-Capital Reserve 067		254,176.97
1770 Morgan Stanley - Endowment Fund - 068		320,499.58
Total Other Assets		\$1,640,537.46
TOTAL ASSETS		\$3,129,857.52
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3100 Restricted Endowment Fund		202,770.21
3110 Temp.Restricted Bldg. Fund		170,605.84
3120 Temporarily Restricted Grants		92,121.80
3130 Unrestricted Fund		2,221,789.62
Opening Bal Equity		0.00
Unrestrict (retained earnings)		188,905.73
Net Income		253,664.32
Total Equity		\$3,129,857.52
TOTAL LIABILITIES AND EQUITY		\$3,129,857.52

Memory Matters

Balance Sheet

As of December 31, 2023

		TOTAL
ASSETS		
Current Assets		
Bank Accounts		
1020 South State Bank	250,560.17	
Petty Cash	356.04	
Total Bank Accounts	\$250,916.21	
Accounts Receivable		
1150 Grants Receivable	55,500.00	
Total Accounts Receivable	\$55,500.00	
Other Current Assets		
Undeposited Funds	0.00	
Total Other Current Assets	\$0.00	
Total Current Assets	\$306,416.21	
Fixed Assets		
1510 Building & Improvements	1,205,302.13	
1520 Furniture & equipment	139,481.45	
1530 Land & Improvements	601,862.31	
1540 Intangible Assets	31,310.00	
1580 Accumulated Depreciation	-795,052.04	
Total Fixed Assets	\$1,182,903.85	
Other Assets		
1705 Fidelity	366,094.73	
1750 Morgan Stanley-Operating Reserve 069	699,766.18	
1760 Morgan Stanley-Capital Reserve 067	254,176.97	
1770 Morgan Stanley - Endowment Fund - 068	320,499.58	
Total Other Assets	\$1,640,537.46	
TOTAL ASSETS	\$3,129,857.52	
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3100 Restricted Endowment Fund	202,770.21	
3110 Temp.Restricted Bldg. Fund	170,605.84	
3120 Temporarily Restricted Grants	92,121.80	
3130 Unrestricted Fund	2,221,789.62	
Opening Bal Equity	0.00	
Unrestrict (retained earnings)	188,905.73	
Net Income	253,664.32	
Total Equity	\$3,129,857.52	
TOTAL LIABILITIES AND EQUITY	\$3,129,857.52	

Memory Matters

Balance Sheet

As of December 31, 2022

		TOTAL
ASSETS		
Current Assets		
Bank Accounts		
1020 South State Bank		168,492.57
Total Bank Accounts		\$168,492.57
Total Current Assets		\$168,492.57
Fixed Assets		
1510 Building & Improvements		1,205,302.13
1520 Furniture & equipment		139,481.45
1530 Land & Improvements		601,862.31
1540 Intangible Assets		31,310.00
1580 Accumulated Depreciation		-720,723.65
Total Fixed Assets		\$1,257,232.24
Other Assets		
1705 Fidelity		349,260.02
1750 Morgan Stanley-Operating Reserve 069		626,585.41
1760 Morgan Stanley-Capital Reserve 067		212,179.51
1770 Morgan Stanley - Endowment Fund - 068		262,443.45
Total Other Assets		\$1,450,468.39
TOTAL ASSETS		\$2,876,193.20
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3100 Restricted Endowment Fund		202,770.21
3110 Temp.Restricted Bldg. Fund		170,605.84
3120 Temporarily Restricted Grants		92,121.80
3130 Unrestricted Fund		2,221,789.62
Opening Bal Equity		0.00
Unrestrict (retained earnings)		525,653.63
Net Income		-336,747.90
Total Equity		\$2,876,193.20
TOTAL LIABILITIES AND EQUITY		\$2,876,193.20

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

*Please refer to the SAMPLE Effectiveness Measurement Form for examples. When completing this form, please expand, contract, or add to the sections as needed (but contain the form to a total of approximately 2 pages). You may choose to use your own format instead of this form, and if doing so, please use the criteria below as a guideline. Regardless of format, **each applicant should choose how they measure degree of success. Applicants need to explain why this is an effective measurement technique that reflects results and how that relates to the objective.***

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Marketing and Community Outreach for all MM Programs and Services				
First Friday	Provide 9 free Zoom caregiver meetings with guest speakers on various topics related to ADRD	\$ 660.00	\$ 74.20	Attendance exceeded 160 participants in both 2022 and 2023.
Community Outreach	Increase Community Outreach through Marketing, Community Presentations, Community events, etc.	\$ 1,800.00	\$1,529.86	Presentation attendees grew from 3736 in 2022 to 4863 in 2023, Free Memory Screenings were up from 301 in 2022 to 458 in 2023
Media	Increase Digital and traditional advertising (print, billboard, TV, social media, etc.) to raise awareness about MM Programs and Services.	\$ 16,748.00	\$ 21,417.35	More than 5,000 served in 2023, compared to 4,000 in 2022 .Increased outreach efforts helped raise awareness about MM Programs and Services.
Web-site Support	Maintain IT support	\$ 1,000.00	\$ 1,334.53	IT support provided to maintain web-page, social media, e-mail marketing, etc.
Promotional Items	Provide Communtiy Events, Speaker Series, Farmers Market and increase attendance for MM classes and programs.	\$ 1,000.00	\$ 2,545.04	Savvy Caregiver increased from 36 attendees in 2022 to 65 in 2023. Speaker Series reached more than 400 individuals. Participation in local events like the Bluffon Farmer's Market and Shelter Cove Volunteer Event has helped increase awareness and attendace as evidenced by increased participation numbers.

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Total		\$ 21,208.00	\$ 26,900.98	

Program Direct-Memory Care Adult Day Respite Program and Early Memory Loss Classes, Brain Boosters				
Certified Nursing Assistant	Provide a C.N.A. to support participants with safety, ambulation, toileting, dining, activities, behavior redirection, etc.	\$ 20,628.25	\$ 28,906.50	C.N.A. provided support for Memory Care day program participants. 75 individuals attended in 2023 compared to 66 in 2022. Expanded day program from 3 days per week to 5 days per week and one day in Bluffton in 2023 from 2022 which increased need for more C.N.A. hours.
Participant Supplies	Provide dementia specific, engaging activity programs.	\$ 1,800.00	\$ 7,795.44	Purchased new supplies (activity supplies, crafts, etc.) for increased day program days and locations.
Program Enrichment	Provide engaging social and sensory stimulating programs.	\$ 3,600.00	\$ 7,869.50	Increased entertainers, instructors, artists, etc. to provide enriching programs for the increased day program days and locations.
Catered Meals/Snacks	Provide nutritious lunch and snacks for participants.	\$ 21,495.00	\$ 31,834.97	Increased meals and snacks for added days and increase in food costs.
Brain Boosters	Increase attendees for the Brain Wellness Classes.	\$ 200.00	165.67	Administrative costs, printing. Increased attendance from 97 to 135 from 2022 to 2023.
Volunteers	Increase volunteer program support.	\$ 1,200.00	\$ 1,543.10	Volunteers have increased from 31 to 53. Volunteers help serve participant meals, assist with activities, provide additional safety and assistance during the day program.
IT/Tech Support	Maintain IT support and subscriptions.	\$ 25,000.00	\$ 29,330.96	Tech support to maintain all IT systems, and subscriptions to operate database, tracking software, etc.
Utilities	Maintain utilities.	\$ 24,900.00	\$ 25,687.26	Water, Dumpster, Phone, Electric
Tech/Equipment	Install cameras, update old cameras.	\$ 5,000.00	\$ 9,461.19	New Cameras installed for safety.

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Cleaning	Maintain DHEC Requirements	\$ 14,200.00	\$ 12,011.76	Maintain clean and sanitized dining, activity, office and restroom spaces per DHEC Requirements.
Landscaping	Maintain Grounds	\$ 3,750.00	\$ 3,228.00	Create safe and clean walkways and parking lot for guests.
Maintenance	Maintain DHEC Requirements	\$ 4,000.00	\$ 12,981.73	Repairs as needed to maintain DHEC requirements.
Security	Maintain security system	\$ 420.00	\$ 872.35	System maintained to meet DHEC requirements.
HVAC	Maintain DHEC Requirements	\$ 1,600.00	\$ 9,579.90	New HVAC system installed to maintain DHEC requirements.
Total		\$ 127,793.25	\$ 181,268.33	

Supports Program and Service Delivery to the Community				
Staff to conduct Programs, Services, Administrative/Operational Duties	Retain, recruit and cultivate professional staff members to deliver high quality programs and services to the community.	\$ 957,585.33	\$ 943,326.18	Memory Matters Employs an Executive Director, Development Director, Marketing Director, Financial Services Director, Receptionist, Family Advocate, Social Worker, Programs and Services Director, 2 Program Specialists/Activity Coordinators, Community Education Director, and 1 part-time Volunteer Coordinator. Each employee either provides direct community education, programs/services or helps support programs and services through operational and administrative duties and serves to increase awareness about Memory Matters programs and services.

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
				In 2023, MM hired a new Recreation Therapist who is also bi-lingual to enhance programs and services and assist with translation as needed. We hired a part-time Volunteer Coordinator to help recruit, retain and acknowledge volunteers. We brought on a new Social Worker to assist families with guidance and resources. All staff receive annual and quarterly dementia training and ongoing professional development to ensure high quality services are being provided for the community. Memory Matters offers a full benefits package and generous vacation and holidays to attract and maintain staff.
Total		\$ 957,585.33	\$ 943,326.18	

Total		\$ -	\$ -	

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

*Please refer to the SAMPLE Effectiveness Measurement Form for examples. When completing this form, please expand, contract, or add to the sections as needed (but contain the form to a total of approximately 2 pages). You may choose to use your own format instead of this form, and if doing so, please use the criteria below as a guideline. Regardless of format, **each applicant should choose how they measure degree of success. Applicants need to explain why this is an effective measurement technique that reflects results and how that relates to the objective.***

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Marketing and Community Outreach for all MM Programs and Services				
First Friday	Provide 9 free Zoom caregiver meetings with guest speakers on various topics related to ADRD	\$ 660.00	\$ 74.20	Attendance exceeded 160 participants in both 2022 and 2023.
Community Outreach	Increase Community Outreach through Marketing, Community Presentations, Community events, etc.	\$ 1,800.00	\$1,529.86	Presentation attendees grew from 3736 in 2022 to 4863 in 2023, Free Memory Screenings were up from 301 in 2022 to 458 in 2023
Media	Increase Digital and traditional advertising (print, billboard, TV, social media, etc.) to raise awareness about MM Programs and Services.	\$ 16,748.00	\$ 21,417.35	More than 5,000 served in 2023, compared to 4,000 in 2022 .Increased outreach efforts helped raise awareness about MM Programs and Services.
Web-site Support	Maintain IT support	\$ 1,000.00	\$ 1,334.53	IT support provided to maintain web-page, social media, e-mail marketing, etc.
Promotional Items	Provide Community Events, Speaker Series, Farmers Market and increase attendance for MM classes and programs.	\$ 1,000.00	\$ 2,545.04	Savvy Caregiver increased from 36 attendees in 2022 to 65 in 2023. Speaker Series reached more than 400 individuals. Participation in local events like the Bluffon Farmer's Market and Shelter Cove Volunteer Event has helped increase awareness and attendance as evidenced by increased participation numbers.

**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Total		\$ 21,208.00	\$ 26,900.98	

Program Direct-Memory Care Adult Day Respite Program and Early Memory Loss Classes, Brain Boosters				
Certified Nursing Assistant	Provide a C.N.A. to support participants with safety, ambulation, toileting, dining, activities, behavior redirection, etc.	\$ 20,628.25	\$ 28,906.50	C.N.A. provided support for Memory Care day program participants. 75 individuals attended in 2023 compared to 66 in 2022. Expanded day program from 3 days per week to 5 days per week and one day in Bluffton in 2023 from 2022 which increased need for more C.N.A. hours.
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**AFFILIATED AGENCIES
EFFECTIVENESS MEASUREMENT**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
				Memory Matters offers a full benefits package and generous vacation and holidays to attract and maintain staff.
Total		\$ 957,585.33	\$ 943,326.18	

Total		\$ -	\$ -	

EFFECTIVENESS MEASUREMENT

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS <i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Total		\$ -	\$ -	

Total Budget to Actual	\$ 1,106,586.58	\$ 1,151,495.49
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TOWN OF HILTON HEAD ISLAND

Executive Department

TO: Town Council
FROM: Marc Orlando, ICMA-CM – Town Manager
DATE: 08/03/2021
SUBJECT: Affiliated Agency Town Funding Standardization Process
CC: Joshua Gruber, Deputy Town Manager
 John Troyer, Finance Director

Background:

The Town receives requests from various commercial and nonprofit entities for funding that supports a wide range of matters and with varying degrees of public purpose justification. These requests became the subject of significant Town Council discussion during the COVID-19 pandemic and ultimately resulted in Council approval of a one-time emergency General Fund distribution for the Arts Center of Coastal Carolina and the Concourse d'Elegance & Motoring festival. Following these discussions, it was requested that staff examine the legal aspects of funding outside agencies both during a declared State of Emergency and as part of its annual budget adoption process. Additionally, it was requested that staff propose a standardized process that would ensure that the awarding of Town General Funds is done in a fair and transparent manner. This Memorandum sets forth information pertaining to the legal ability for local governments in South Carolina to provide funding to commercial and nonprofit organizations as well as a recommendation to establish a formal process to review and award Town General Funds.

Recommendation:

Staff recommends that the Town Council adopt a formal policy wherein all requests for Town funding from affiliated and/or outside agencies will be submitted to the Finance and Administration Committee for review and recommendation as part of the annual fiscal budget adoption. An outline of how this process could potentially function is as follows:

1. Requesting agency submits Town funding request application form containing the following:
 - a. Identification of the organization and its background
 - b. Copies of audited financial statements
 - c. Copy of current budget identifying all anticipated revenues and expenses
 - d. Summary of previous governmental funding that has been received
 - e. Justification/proposed uses of requested funding demonstrating how this funding will provide a public function of the Town
 - f. Identification of operational metrics that will be tracked to demonstrate goal achievement
 - g. Future capital projects or changes in service delivery scope that might impact future operations or financial requests
2. Finance & Administration Committee Receives Requests and selects agencies to make presentations.

3. Selected agencies make a presentation to the Finance & Administration Committee outlining their funding request and answer any questions.
4. Finance & Administration Committee submits recommendation on affiliated agency funding requests to Town Council as part of the annual fiscal year budget adoption process.

Any requests for funding made outside of the annual fiscal budget adoption process should be discouraged and the granting of funding outside of this process should be limited to only extraordinary circumstances. Should it become necessary to take up such an extraordinary request, the review and consideration process adopted by Town Council should be utilized in a manner to similar to that of the formal annual budget adoption process identified above.

General Fund Appropriations

The South Carolina Constitution provides certain prohibitions on the expenditure of public funds which are generally inclusive of all sources of ad valorem tax revenues maintained within a jurisdiction's General Fund. Under Title 10 Section 11 of the Constitution it states, "[t]he credit of neither the State nor of any of its political subdivisions shall be pledged or loaned for the benefit of any individual, company, association, corporation, or any religious or other private education institution except as permitted by Section 3, Article XI of this Constitution."

The South Carolina courts as well as the South Carolina Attorney General's Office have interpreted this provision to prohibit local governments from providing funding to non-governmental agencies unless the funds are being provided for an express "public purpose."

Public funds may be appropriated to a private nonprofit, nonsectarian organization if the funds are to be expended in the promotion of a valid public purpose. *Op. Atty. Gen., December 18, 1979, at 1*. The appropriation of public funds to these private entities is, in effect, an exchange of value which results in the performance by those entities of a public function for the State. *Op. Atty. Gen., November 16, 1983*. Our Supreme Court has also recognized generally that where the expenditure of public funds is 'primarily for the benefit of the State . . .' there is no violation of Article X, § 11. *South Carolina Farm Bureau Marketing Assn. v. South Carolina State Ports Authority*, 278 S.C. 198, 293 S.E.2d 854, 857 (1982).

Therefore the central question in identifying whether or not a transfer of public funds to a private entity is constitutionally valid is dependent upon such transfer being recognized as being for the benefit of the public.

Pursuant to this justification, the Town has annually contracted with certain "affiliated agencies" to provide management, programming, oversight, support, or ongoing maintenance of services offered to the public on behalf of the Town. These services have historically been performed and carried out by nonprofit third-parties with such expenditures being stated on an individual basis within the Town's annual adopted budget. Based upon the most recently adopted Fiscal Year 2022 budget, the following affiliated agencies received Town General Funds:

FY2022	Funding Amount	Public Services
Island Recreation Association	\$1,087,578	Offers youth and adult recreational programming on

		Town and County owned property. Manages special event rentals of certain Town owned properties.
Coastal Discovery Museum	\$180,000	Operates the Town owned Honey Horn Plantation and provides public access to the site. Funding within this category also supports the Historic Mitchelville Freedom Park.
USCB Island Ambassador Program	\$186,367	Provides certification program to become an Island Ambassador through studying Island knowledge, Island culture and Island ecology. This program was created through a partnership between the Town and USCB.
Palmetto Breeze	\$225,165	This is the local matching funds for the Town's urban and rural federal transportation grant funding.
Solicitor/Court Services	\$168,500	These services provide criminal prosecution and other judicial services for offenses occurring on Hilton Head Island.
Beaufort County Economic Development Corporation	\$25,000	This is the Town's local matching funds to be a participating member of the Beaufort County Economic Development Corporation.

South Carolina Courts have examined the question of what constitutes a "public purpose" and have also long determined that whether an act of a governmental body is for a public purpose is primarily one for the Legislature to determine and the courts will not interfere unless the determination by that body is clearly wrong. *Elliott v. McNair*, 250 S.C. at 86-87.

"The consensus of modern legislative and judicial thinking is to broaden the scope of activities which may be classes as involving a public purpose. 37 *Am.Jur.*, *Municipal Corporations*, Sec. 132. It reaches perhaps its broadest extent under the view that economic welfare is one of the main concerns of the city, state and the federal governments." *State ex rel. Jardon v. Industrial Development Authority of Jasper County*, 570 S.W.(2d) 666 (Mo. 1978)."

As such, public funding can be provided for the provision of direct public services or for the overall economic welfare of a community when there is a specific legislative funding by a governmental body that such purpose does in fact exist and that the benefit to the community from the investment of public funds will substantially justify its investment.

Pandemic Related Funding Sources

Due to the unprecedented public health crisis that has been created by the COVID-19 pandemic, several unique funding opportunities have arisen that have not previously existed due to the restrictions contained with the South Carolina Constitution. Or, that have otherwise been altered so as to provide relief to individuals that have been negatively impacted by these events without running afoul of the aforementioned limitations.

CDBG Grant Process through Community Foundation of the Lowcountry

The Town sought approval from the United States Department of Housing and Urban Development to utilize its unspent allocation of Community Development Block Grant funding from the Fiscal Year 2020 budget as well as those funds received for the Fiscal Year 2021 to create grants to local nonprofit organizations that have been supporting residents who were impacted by the COVID-19 pandemic. The Town received such approval and partnered with the Community Foundation of the Lowcountry to distribute a total of \$730,833.00 to various local nonprofits that provided assistance to Hilton Head Island residents that needed support in the areas of rental and utility assistance, mortgage assistance, child care expenses, food insecurities, and more. A full listed of the entities who received Town funding under this program is as follows:

U.S. Department of Housing and Urban Development (HUD) Community Development Block Grants (CDBG)			
Organization	No. of Awards	Total Award Amount	Purpose of Grant
Boys & Girls Club of Hilton Head Island	3	\$79,739.00	1.Scholarship for Distance Learning Program 2.Cleaning Expenses, PPE
Foundation for Educational Excellence	2	\$61,000.00	Tutoring programs at HHI public schools, educational materials
Hilton Head Island Recreation Association	1	\$3,000.00	Virtual Learning Program
HH Regional Habitat for Humanity	1	\$25,000.00	Emergency Housing Assistance
Lowcountry Legal Volunteers	1	\$51,000.00	Workshops to help educate people facing potential housing evictions
Mental Health America (MHA) of Beaufort -Jasper	1	\$25,000.00	Scholarships for MHA group therapy assistance
Native Island Business & Community Affairs Association	1	\$25,000.00	Emergency Housing Assistance
Neighborhood Outreach Connection	2	\$79,500.00	1.Living Expenses for Clients 2. Program operation expenses
Sandalwood Community Food Pantry	4	\$40,500.00	Food and PPE for distribution to clients
Second Helpings	1	\$12,000.00	Food purchase for distribution
Society of St. Vincent de Paul Holy Family Conference	1	\$25,000.00	Rent and utility assistance for HHI clients
The Children's Center	3	\$87,094.00	1. Remediation and Sanitation Expenses 2. PPE, Safety Supplies, Remediation Expenses 3.Tuition assistance for families
The Hilton Head Island Deep Well Project	3	\$116,000.00	Emergency housing, rent and utilities

The Literacy Center	1	\$25,000.00	Technology & Instruction Cost for Distance Learning Service
Volunteers in Medicine Hilton Head Island	2	\$76,000.00	1. PPE for patients, staff, volunteers 2. Isolation boxes/lodging for COVID-19 positive individuals
Total	27	\$730,833.00	

Recently, the South Carolina Attorney General's Office was asked to examine the appropriateness of an emergency grant funding program that was being proposed by Lancaster County. *Op. Atty. Gen., April 29, 2020*. This grant program was predicated on the fact that an applicant had applied for, and exhausted, all federal relief funds that were available to the applicant business. The grant program also required that the applicant demonstrate a direct financial hardship as a result of the COVID-19 pandemic. The grant program was also not restricted to any particular category of business but were open to all and limited in eligibility only on the basis of the number of employees at the business.

In response to this inquiry, the Attorney General's Office stated that in order for such a program to be constitutionally authorized, the governing body of Lancaster County would need to find that the creation of such a grant program would serve a public purpose. The opinion went on to provide four specific factors that should be used when determining if an action serves a public purpose. Those are as follows:

1. **Is there an ultimate goal or benefit intended to the public by virtue of the project?**
2. **Will public or private parties be the primary beneficiary?**
3. **How speculative in nature is the project?**
4. **On balance, what is the probability that the public interest will ultimately be served and to what degree?**

Therefore, if the Town Council desires that a formalized process be created for providing grants from the Town's General Fund to entities on the Island or to entities that have been impacted by the COVID-19 Pandemic, then such action should first be precipitated by a formal legislative action of the Town Council that undertaking such action would serve a public purpose specifically addressing such items in the manner outlined above.

Conclusion:

The South Carolina Constitution and subsequent judicial jurisprudence has established clear restrictions on the types of activities or services that can receive a local government's General Fund financial support. In order to remain in compliance with these restrictions and to ensure a fair, equitable, and transparent review of the appropriation process, staff is recommending that Town Council develop a formal policy wherein the Finance and Administration Committee would receive and review all requests for funding from affiliated/outside agencies. It would then make award recommendations to Town Council as part of the annual fiscal budget adoption process. Any request for funding made outside of the annual fiscal budget adoption process would be discouraged and the granting of funding outside of this process would be limited to only extraordinary circumstances. Should it become necessary to take up such an extraordinary request, the review and consideration process adopted by Town Council would be utilized in a manner to similar to that of the formal annual budget adoption process identified above. A draft Affiliated Agency Funding Request Application as outlined within this Memorandum has been enclosed as an attachment for consideration.



TOWN OF HILTON HEAD ISLAND

Finance and Administrative Committee

TO: Finance and Administrative Committee
FROM: Angie Stone, Assistant Town Manager
DATE: April 9, 2024
SUBJECT: Review of the 2023 Hilton Head Island Destination Marketing Organization (DMO) Industry Metrics Report - Angie Stone, Assistant Town Manager, Community Engagement

RECOMMENDATION:

Staff recommends the Finance and Administrative Committee review the 2023 Hilton Head Island Destination Marketing Organization (DMO) Industry Metrics Report.

SUMMARY:

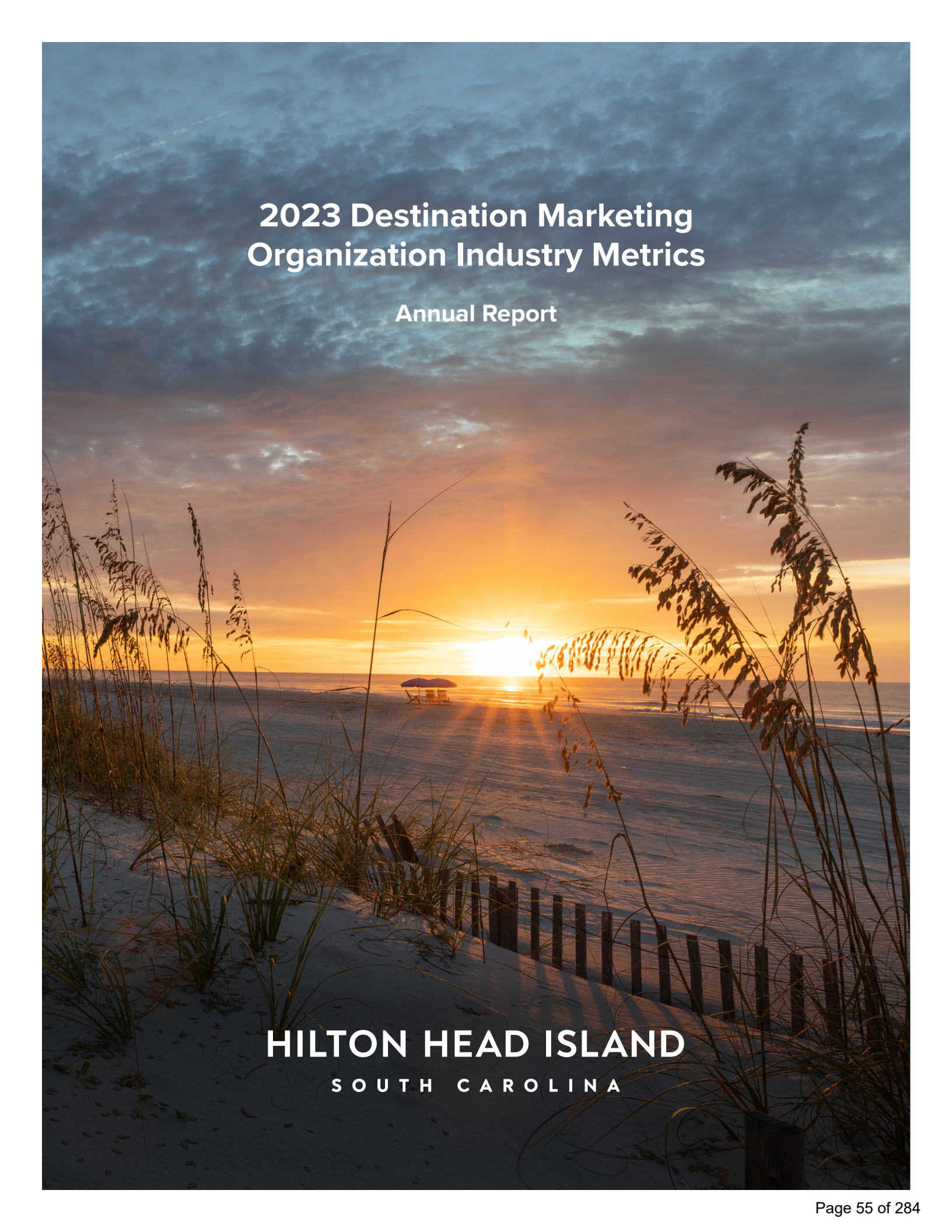
According to State law, 30% of the two percent bed tax funds collected by the State of South Carolina is allocated to the pre-determined Destination Marketing Organization with an ongoing tourist program, which the Town Council has designated the Hilton Head Island - Bluffton Chamber of Commerce Visitor and Convention Bureau. The Industry Metrics will provide background information for the Finance and Administrative Committee to consider when reviewing the proposed budget and marketing plan for a recommendation to Town Council.

BACKGROUND:

On April 9, 2024, the VCB will present the 2023 Hilton Head Island Destination Marketing Organization (DMO) Industry Metrics Report. This is part of the normal, annual performance review of the Town's contractual relationship with its DMO.

ATTACHMENTS:

1. 2023 DMO Metrics Report



2023 Destination Marketing Organization Industry Metrics

Annual Report

HILTON HEAD ISLAND
SOUTH CAROLINA

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



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Visitor and Resident Satisfaction Surveys

Executive Summary

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

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

- 2023 Visitor Profile Study Executive Summary, Office Tourism Analysis, College of Charleston
- Wave 3 Community Sentiment Survey Executive Summary, MMGY Travel Intelligence



Revenue Per Available Room, Occupancy Rates & Average Daily Rate

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

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

RevPar

ROOM REVENUE
ROOMS AVAILABLE

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

OCC

ROOMS SOLD
ROOMS AVAILABLE

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

ADR

ROOM REVENUE
ROOMS SOLD

Details on the next page provide 2023 performance metrics for Hilton Head Island in a two-source combined calculation that includes both home & villa and hotels as well as broken out separately for comparison. There are also additional metrics for the hotel industry that show Hilton Head Island compared against the U.S. as a whole and top competitors, Charleston and Savannah.

Home & villa numbers are based on 3,349 units/keys and could vary, as an example from a one-bedroom villa to a ten-bedroom house. The hotel numbers are based on 3,198 total hotel rooms at eighteen properties on the island.

2023 Hilton Head Island Lodging Performance

2-SOURCE (Combined Home & Villa and Hotel Report)

HOME & VILLA

HOTELS

RevPAR	\$167.00  -6%	\$205.00  -7%	\$139.00  -5%
OCC	57.0%  -3%	59.0%  -3%	58.0%  -3%
ADR	\$290.00  -3%	\$375.00  -4%	\$240.00  -2%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPar up +4.9%
- Occupancy up +0.6%
- ADR up +4.3%

Competitor Set

Charleston

- RevPar up +2.6%
- Occupancy up +0.8%
- ADR up +1.8%

Savannah

- RevPar up +1.7%
- Occupancy up +1.1%
- ADR up +0.6%

Source: 2023 Keydata and 2023 Smith Travel Research

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

Note: In 2023 we transitioned to a different data set in Keydata that removed owner occupancy from the occupancy percentage.

2022 Hilton Head Island Lodging Performance

2-SOURCE (combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$175.00 ↑ +8%	\$221.00 ↑ +18%	\$147.00 ↑ +1%
OCC	54.0% ↔ 0% FLAT	45.0% ↑ +4%	60.0% ↓ -2%
ADR	\$323.00 ↑ +8%	\$496.00 ↑ +13%	\$247.00 ↑ +3%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +29.8%
- Occupancy up +8.9%
- ADR up +19.1%

Competitor Set

Charleston

- RevPAR up +19.4 %
- Occupancy up +6.1%
- ADR up +12.5%

Savannah

- RevPAR up +24.2%
- Occupancy up +7.7%
- ADR up +15.4 %

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

2021 Hilton Head Island Lodging Performance

2-SOURCE (Combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$175.00 ↑ +44.9%	\$191.00 ↑ +36.2%	\$150.00 ↑ +81.9%
OCC	59.9% ↑ +26.9%	60.4% ↑ +26.2%	60.3% ↑ +29.9%
ADR	\$292.00 ↑ +14.2%	\$317.00 ↑ +8.0%	\$249.00 ↑ +40.1%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +58.1%
- Occupancy up +31%
- ADR up +20.7%

Competitor Set

Charleston

- RevPAR up +92.2%
- Occupancy up +39.1%
- ADR up +38.2%

Savannah

- RevPAR up +77.2%
- Occupancy up +35.0%
- ADR up +31.2%

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

2020 Hilton Head Island Lodging Performance

2-SOURCE (Combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$131.00 ↑ +4.4%	\$164.00 ↑ +19.4%	\$81.59 ↓ -28.5%
OCC	47.7% ↓ -6.9%	49.0% ↑ +5.4%	47.7% ↓ -23.5%
ADR	\$275.00 ↑ +12.1%	\$335.00 ↑ +13.3%	\$171.11 ↓ -6.6%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR down -47.5%
- Occupancy down -33.3%
- ADR down -21.3%

Competitor Set

Charleston

- RevPAR down -48.6%
- Occupancy down -33.4%
- ADR down -22.8%

Savannah

- RevPAR down -42.0%
- Occupancy down -29.9%
- ADR down -17.3%

Source: 2020 Inntopia DestiMetrics and 2020 Smith Travel Research Inc.
COVID-19

2019 Hilton Head Island Lodging Performance

2-SOURCE (Combined Home & Villa and Hotels Report)

HOME & VILLA

HOTELS

RevPAR	\$126.00 ↑ +3.1%	\$136.00 ↑ +3.6%	\$142.31 ↑ +4.1%
OCC	51.4% ↑ +4.2%	47.0% ↑ +4.2%	63.4% ↑ +2.4%
ADR	\$246.00 ↓ -1.0%	\$290.00 ↓ -0.6%	\$224.43 ↑ +3.6%

HOTEL INDUSTRY COMPARISON

Nationwide

- RevPAR up +0.9%
- Occupancy Flat YoY
- ADR up +1.0%

Competitor Set

Charleston

- RevPAR down -2.3%
- Occupancy down -1.9%
- ADR down -0.5%

Savannah

- RevPAR 0.0%
- Occupancy down -0.9%
- ADR up +0.9%

Source: 2019 Inntopia DestiMetrics and 2019 Smith Travel Research Inc.
Hurricane Dorian - September 2019

Visitor Spending Studies

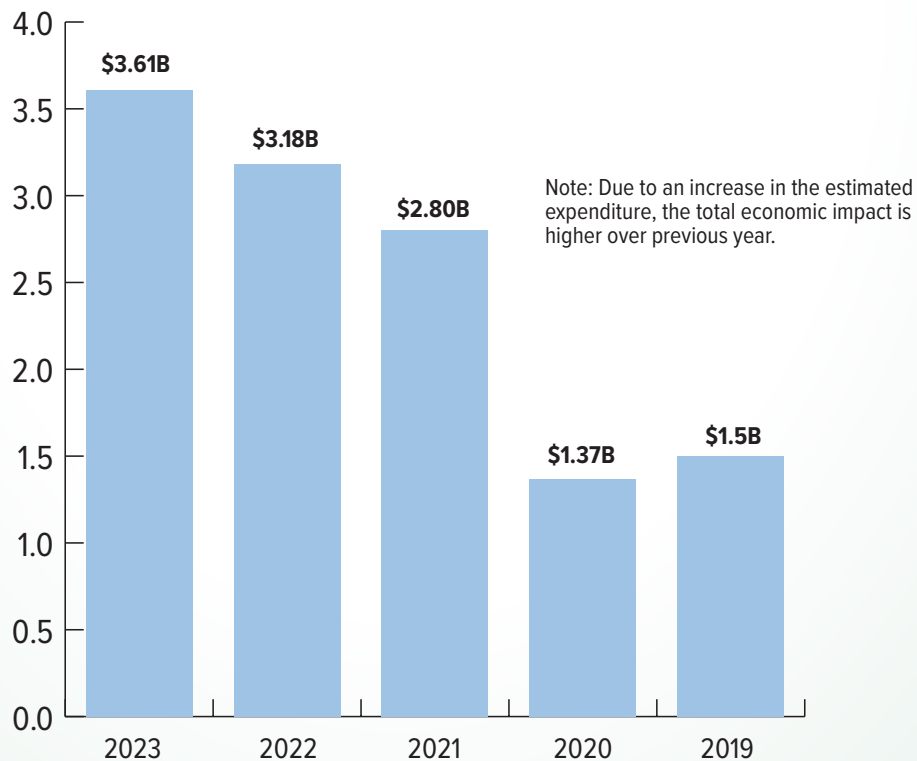
This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2023 was performed by the College of Charleston School of Business, Office of Tourism Analysis.

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



\$3.61 BILLION

ECONOMIC IMPACT OF HILTON HEAD ISLAND TOURISM IN 2023



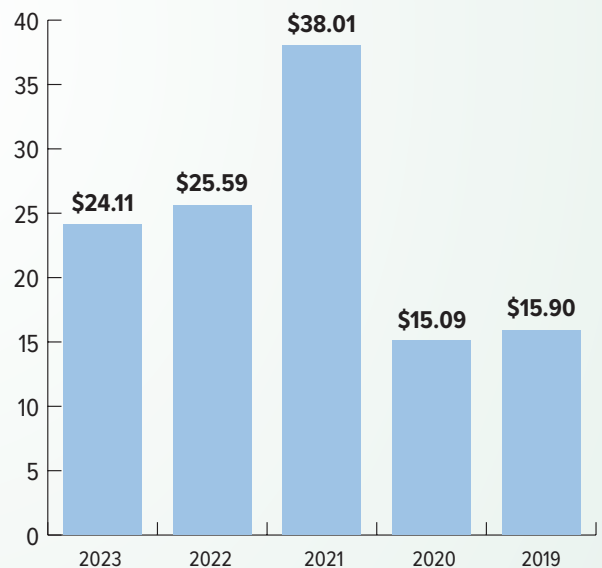
Source: *Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2023*

ROI for Visitor Spending Per Dollar of Investment

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

The marketing efforts put forth by the Visitor & Convention Bureau are delivered consistently to a well-defined target consumer set that aligns with our visitor research. Hilton Head Island experienced a slight decrease in visitation by 3.4% compared to 2022.

FOR EVERY TAX DOLLAR INVESTED IN MARKETING



Source: *Estimated Total Impact of Tourism in Hilton Head Island on Beaufort County, South Carolina 2023*



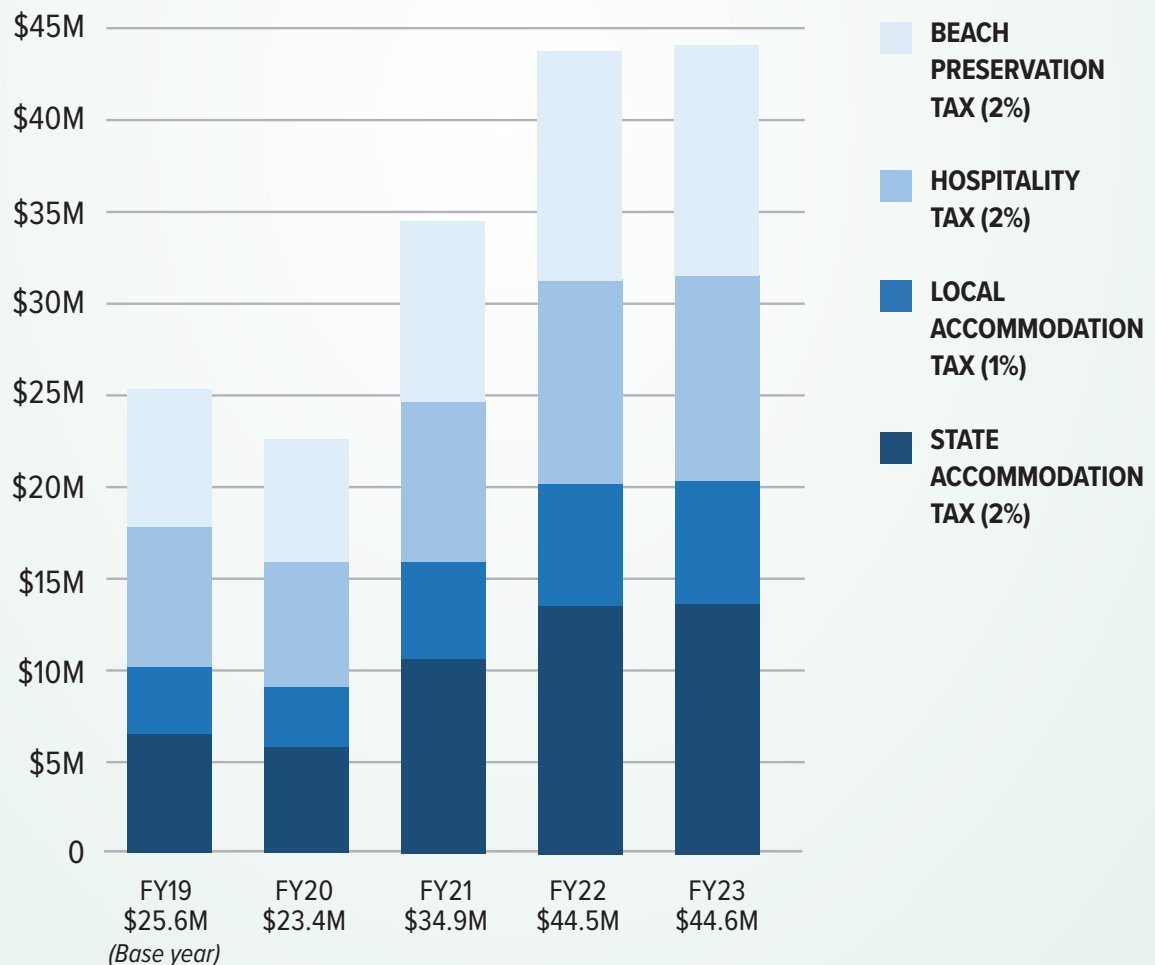
Local Tax Revenues Generated by Visitor

↑74%

ACCOMMODATION & HOSPITALITY TAX UP OVER 5 YEARS

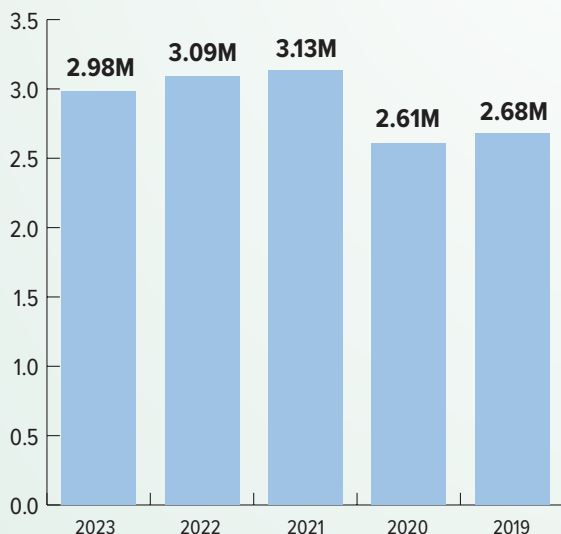
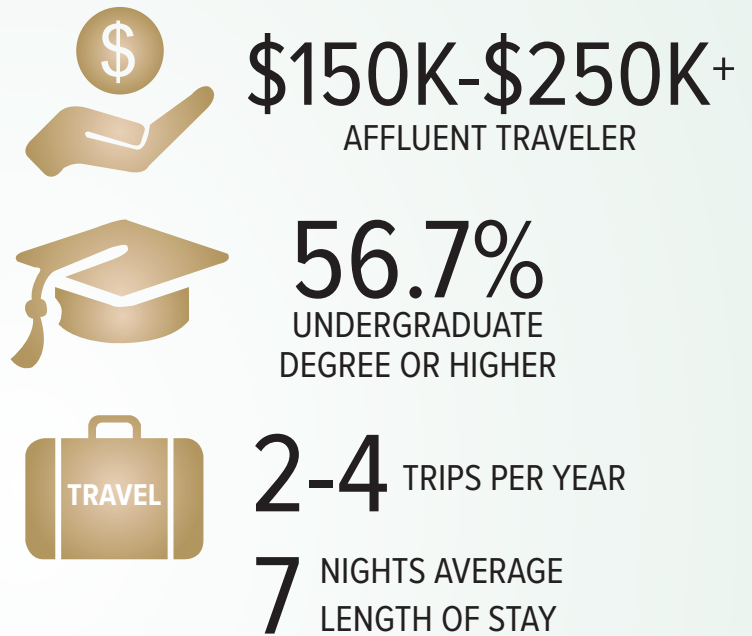
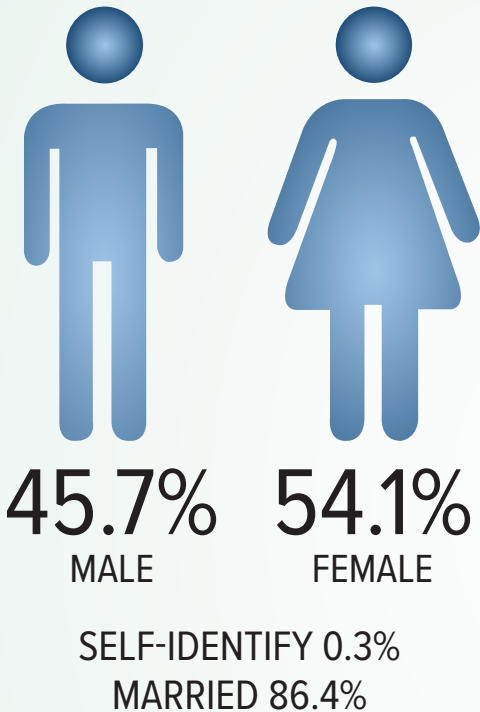
Source: Town of Hilton Head Island

TOWN OF HHI ATAX and HTAX COLLECTIONS



Number of Visitors

Based upon research gathered both locally and nationally, the Visitor & Convention Bureau is committed to attracting an affluent traveler with a household income of \$150K-\$250K+. Our target visitor skews Female (54.1%) and aged 20 - 39. This traveler has an undergraduate degree or higher (56.7%) and plans to take 2 to 4 trips per year lasting an average of 7 nights per trip. Our target key regions include the Northeast, Midwest, and Southeast markets.



2.98M
NUMBER OF
VISITORS IN 2023

Sources: 2023 Visitor Profile Study/Keydata/Smith Travel Research Inc./
College of Charleston

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

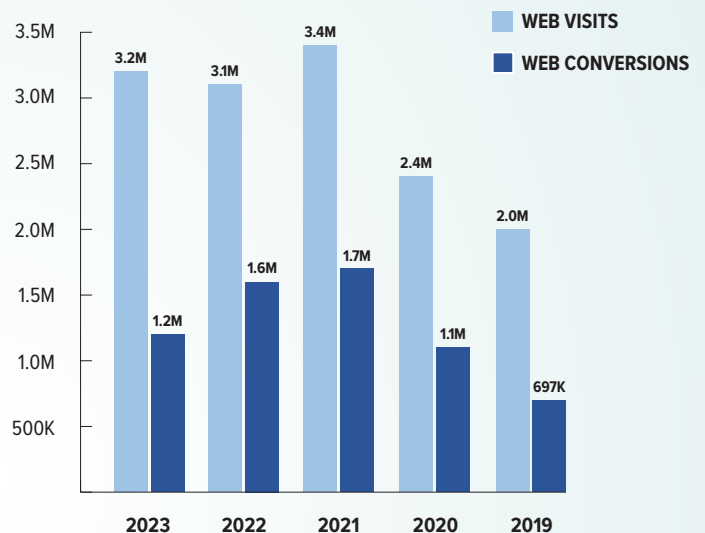
The HiltonHeadIsland.org website is our virtual storefront. The website serves as the window to our destination and plays an integral part in the decision-making process. The following metrics are important key indicators of overall brand health and allow insight into visitor behavior. The insight and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

3.2M

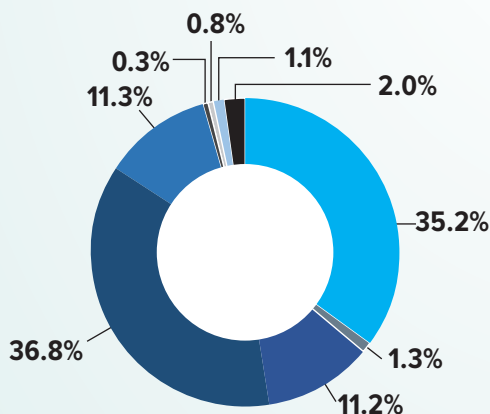
WEBSITE VISITS
IN 2023

1.2M

WEBSITE CONVERSIONS
TO PARTNERS IN 2023

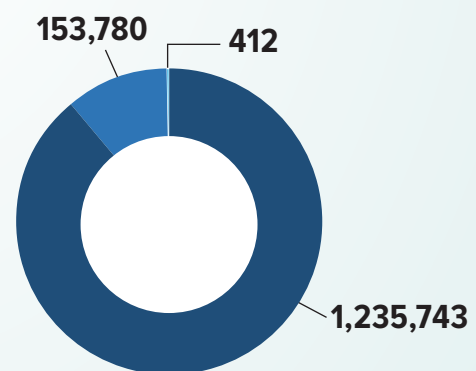


Visits by Source



ORGANIC SEARCH PAID MEDIA DIRECT DISPLAY EMAIL
REFERRAL OTHER CROSS NETWORK ORGANIC SOCIAL

Conversion by Category



HHI PARTNER LINKS GOLF PARTNER LINKS
NEWSLETTER LONG FORM SUBMIT

Source: Google Analytics & VERB Interactive

Numbers Related to Mail Fulfillment

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

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

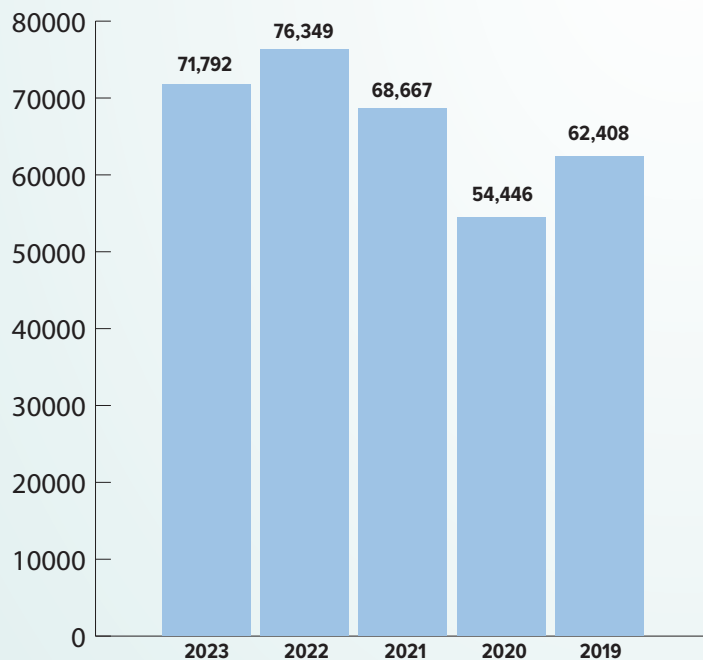
71,792

**HILTON HEAD ISLAND
VACATION PLANNERS
AND GOLF ISLAND
BROCHURES MAILED**

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

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

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



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

Spotlight on Accolades

America's Favorite Island®



Condé Nast Traveler
**“Top Island in the United
States Reader’s Choice 2023”**

NY Post
**Named among “Best Family-
Friendly Vacations of 2023”**

Town & Country
**Named Among “The 40 Best
Beaches on the East Coast”**

Spotlight on Accolades

AARP
**Named Among “Top Places
to Golf Your Way Into
Retirement”**

TripAdvisor
**Named among “Top 10
Trending Winter Destinations
for U.S. Travelers”**

Southern Living
**Named Among Top 20
Memorial Day Weekend
Destinations in the South**

Trip Savvy
**Named among
“15 Best Islands in the U.S.”**

Number of Jobs Created by Tourism

This study of the economic and fiscal impact of spending by visitors to Hilton Head Island in the year 2023 was performed by the College of Charleston School of Business, Office of Tourism Analysis.

The 40,641 jobs that comprise the estimated total employment impact generated by the five combined visitor segments in 2023 represent 33.3% of all jobs in Beaufort County.

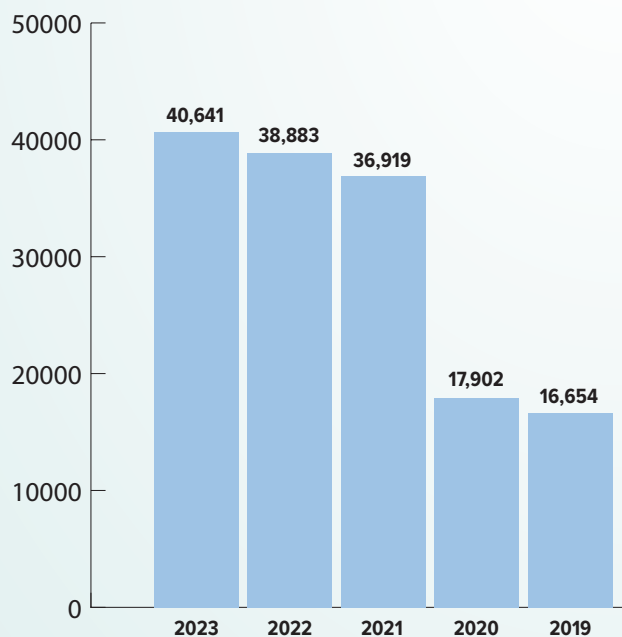
40,641 JOBS

GENERATED FROM
HILTON HEAD ISLAND TOURISM

TOURISM ON HHI
NOW ACCOUNTS FOR

33.3%

OF ALL JOBS IN
BEAUFORT COUNTY



*Source: Estimated Total Impact of
Tourism In Hilton Head Island On
Beaufort County, South Carolina 2023*

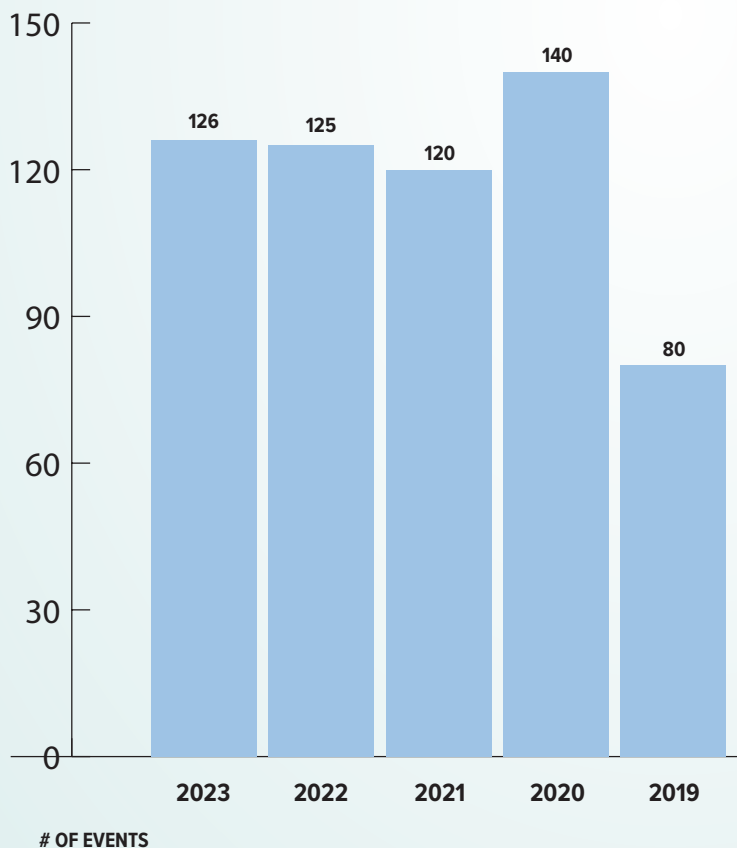
*Note: The number of jobs generated are based on
economic activity within different sectors of tourism.
(e.g. airlines, car rentals, coach services, etc).*

Networking Events, Workshops and Member/Community Events

In 2023, we celebrated 43 ribbon cuttings and groundbreaking ceremonies along with 83 in-person and virtual networking, learning seminars, and meetings, reaching 6,053 people.

83+ IN PERSON + VIRTUAL
CHAMBER EVENTS

43 RIBBON CUTTINGS
& GROUNDBREAKING
CEREMONIES



2023 EVENTS

JANUARY

01/06/2023

Ribbon Cutting: Nutrishop
[Hilton Head Island](#)

01/10/2023

Ribbon Cutting:
Mermaid of Hilton Head Island
[Bluffton](#)

CYP Networking at
Hilton Head Island Distillery
[Hilton Head Island](#)

01/11/2023

Power Hour Tele Town Hall
[Virtual](#)

Jr. Leadership Class Day:
Successful Living
[Bluffton](#)

Leadership Class -
Healthcare Day
[Hilton Head Island](#)

Ribbon Cutting:
Parker's Store 91
[Bluffton](#)

01/19/2023

Ribbon Cutting: Kind of Blue
[Hilton Head Island](#)

01/24/23

Ribbon Cutting: Pure Salt Studios
[Hilton Head Island](#)

01/25/2023

Biscuits + Benefits
[Hilton Head Island](#)

01/27/2023
Ribbon Cutting: Moor Spa
[Hilton Head Island](#)
01/28/2023 - 02/04/2023
Chamber Restaurant Week
[Hilton Head Island & Bluffton](#)

FEBRUARY

02/01/2023
Power Hour Tele Town Hall
[Virtual](#)
Executive Connection at
First Citizens Bank
[Bluffton](#)
02/08/2023
Leadership Program -
Education Day
[Bluffton](#)
02/15/2023
Jr. Leadership Program -
Civic Engagement
[Bluffton](#)
02/16/2023
Conversation + Cocktails
at AutoNation
[Bluffton](#)
02/21/2023
Chamber Young Professionals
at Palmetto Axes
[Bluffton](#)
02/22/2023
Ribbon Cutting: COAST
Brokered by eXp Realty
[Hilton Head Island](#)
02/23/2022
Ribbon Cutting: StretchZone
(Lowcountry Stretch)
[Bluffton](#)
Ribbon Cutting: StretchZone
(Lowcountry Stretch)
[Hilton Head Island](#)
02/28/2023
Ribbon Cutting: Pure Barre
[Hilton Head Island](#)

MARCH

03/01/2023
Power Hour Tele Town Hall
[Virtual](#)

03/07-08/2023
Leadership State
Government Overnight
[Columbia](#)
03/08/2023
Business Education
Partnership & Bluffton Regional
Business Council Meeting
[Hilton Head Island](#)

03/09/2023
Public Policy
Committee Meeting
[Hilton Head Island](#)
Ribbon Cutting:
Monkees of Bluffton
[Bluffton](#)
03/15/2023
Ribbon Cutting: Maid for You
[Hilton Head Island](#)
03/16/2023
Conversation + Cocktails
at Chronic Golf +Games
[Hilton Head Island](#)

03/22/2023
Biscuits + Benefits
[Hilton Head Island](#)

Jr. Leadership -
Lowcountry Day
[Hilton Head Island](#)

03/23/2023
Ribbon Cutting:
Kelly Caron Curated
[Bluffton](#)

03/24/2023
Chamber Young Professionals
at Skillets Cafe & Grill
[Hilton Head Island](#)

APRIL

04/01/2023
Chamber Ball: Mad for Plaid
[Hilton Head Island](#)
04/05/2023
Power Hour Tele Town Hall
[Virtual](#)

Leadership - Arts &
Environment Day
[Hilton Head Island & Bluffton](#)

04/06/2023
Ribbon Cutting: Corner Perk
Hilton Head Island
[Hilton Head Island](#)

Plaid Par-Tee at USCB Hilton
Head Island Campus
[Hilton Head Island](#)

04/18/2023
Leadership Program
Information Session
[Hybrid](#)

Ribbon Cutting:
Nonna Rosa
[Okatie](#)

04/19/2023
Executive Connection
at Vivid Gallery
[Hilton Head Island](#)

04/20/2023
Jr. Leadership -
Teambuilding 2.0
[Bluffton](#)

Ribbon Cutting: Head Island
Coffee Roasters
[Hilton Head Island](#)

04/25/2023
Ribbon Cutting:
Harley Davidson
[Hilton Head Island](#)

04/27/2023
Leadership Program
Information Session
[Hilton Head Island](#)

Ribbon Cutting: J Parker LTD
[Bluffton](#)

04/28/2023
Ribbon Cutting:
Deano's Wood Fired
[Hilton Head Island](#)

MAY

05/03/2023
Power Hour Tele Town Hall
[Virtual](#)

Jr. Leadership Graduation
at USCB Hilton Head Island
Gateway Campus
[Hilton Head Island](#)

05/04/2023
Ribbon Cutting: F45 Training
[Hilton Head Island](#)

05/15/2023
Small Business Week:
Pork in the Parking Lot
[Hilton Head Island](#)

05/17/2023
Small Business Week: Road
to Entrepreneurship at The
Culinary Institute of the South
[Bluffton](#)

05/18/2023
Small Business Week: Bluffton
Block Party at Lowcountry
Fresh Market & Cafe
[Bluffton](#)

05/19/2023
Ribbon Cutting:
Lucky Beach
[Hilton Head Island](#)

Small Business Week:
Chamber Food Truck Friday
[Hilton Head Island](#)

05/24/2023
Biscuits + Benefits
[Hilton Head Island](#)

05/25/2023
Ribbon Cutting: Black Marlin
[Hilton Head Island](#)

JUNE

06/06/2023
Ribbon Cutting: The Bank
[Hilton Head Island](#)

06/07/2023
Leadership Graduation
at The Sea Pines Resort
[Hilton Head Island](#)

06/08/2023
Public Policy
Committee Meeting
[Hilton Head Island](#)

06/15/2023
Business Education
Partnership & Bluffton
Regional Business Council
Meeting
[Hilton Head Island](#)

Conversation + Cocktails
at Skillets Cafe
[Hilton Head Island](#)

06/21/2023
Ribbon Cutting:
OneCare Clinic
[Hilton Head Island](#)

Ribbon Cutting: Branches
[Hilton Head Island](#)

Chamber Champions
at Wexford
[Hilton Head Island](#)

06/22/2023
Ribbon Cutting: Encompass
Health 5 Year Anniversary
[Bluffton](#)

06/23/2023
Ribbon Cutting: Okàn
[Bluffton](#)

06/26/2023
Business Golf Classic at The
Golf Club at Indigo Run
[Hilton Head Island](#)

06/28/2023
Ribbon Cutting: En Dentelle
[Bluffton](#)

Ribbon Cutting:
Live Oak Weight Loss
[Hilton Head Island](#)

06/29/2023
Ribbon Cutting: Daufuskie
Island Visitor Center
[Hilton Head Island & Bluffton](#)

JULY

07/11/2023
Ribbon Cutting:
Bayshore Villas
[Hilton Head Island](#)

07/12/2023
Power Hour Tele Town Hall
[Virtual](#)

07/13/2023
Public Policy Committee
[Hilton Head Island](#)

07/18/2023
Chamber Young Professionals
at Indy Karting
[Bluffton](#)

07/20/2023
Bluffton Regional Business
Council & Business Education
Partnership Committee
[Hilton Head Island](#)

07/20/2023
Bluffton Regional Business
Council / Business Education
Partnership Committee
[Hilton Head Island](#)

07/25/2023
Leadership Alumni Association
Networking at Street Meet
[Hilton Head Island](#)

07/26/2023
Biscuits + Benefits
[Hilton Head Island](#)

AUGUST

08/09/2023
Power Hour Tele Town Hall
[Virtual](#)

08/10/2023
Public Policy
Committee Meeting
[Chamber](#)

08/14/2023
Ribbon Cutting:
Mobility City
[Bluffton](#)

08/15/2023
Ribbon Cutting:
Hilton Head Island Prep
[Hilton Head Island](#)

08/16/2023
Leadership Orientation
[Chamber](#)

08/17/2023
Business Education Partnership
Bluffton Regional Business
Council
[Hilton Head Island](#)

Conversation + Cocktails
at Hampton Hall Club
[Bluffton](#)

08/24/2023
Ribbon Cutting:
Woof Gang Bakery
[Hilton Head Island](#)

Chamber Young Professionals
Networking at Aquatera
[Hilton Head Island](#)

08/27/2023
Jr. Leadership Orientation
at Hilton Garden Inn
[Hilton Head Island](#)

SEPTEMBER

09/08/2023-09/09/2023
Leadership Program Retreat
[Hilton Head Island](#)

09/08/2023
Ribbon Cutting: Avocado Bikes
[Hilton Head Island](#)

09/13/2023
Power Hour Tele Town Hall
[Virtual](#)

Jr. Leadership Class Day -
Teambuilding - Dockside
[Hilton Head Island](#)

Executive Connection at
Shoreline Construction
[Bluffton](#)

09/14/2023
Ribbon Cutting:
Skillet's 30th Anniversary
[Hilton Head Island](#)

09/15/2023
Public Policy Committee
Meeting / SC Chamber
Grassroots Annual Meeting
[Hilton Head Island & Virtual](#)

09/20/2023
Leadership Class Day -
Leadership Community
and Culture - Dockside
[Hilton Head Island](#)

09/21/2023
Business Education
Partnership Bluffton
Regional Business Council
[Hilton Head Island](#)

Conversation + Cocktails
at Okàn
[Bluffton](#)

09/27/2023
Business Workforce
Coalition
[Hilton Head Island](#)

Biscuits + Benefits
[Hilton Head Island](#)

09/28/2023
Chamber Young Professionals
Beach Clean Up at Marriott
Vacation Club International
[Hilton Head Island](#)

09/29/2023
Ribbon Cutting:
The Lofts at Coligny Beach
[Hilton Head Island](#)

OCTOBER

10/04/2023
Power Hour Tele Town Hall
[Virtual](#)

10/06/2023
Ribbon Cutting: Realty One
Group Lowcountry
[Hilton Head Island](#)

10/11/2023
Leadership Class Day - Town
of Hilton Head Island
Government
[Hilton Head Island](#)

10/12/2023
Public Policy
Committee Meeting
[Hilton Head Island](#)

Ribbon Cutting:
No Bull Mattress & More
[Hilton Head Island](#)

10/18/2023
Jr. Leadership Class Day -
College & Career
[Bluffton](#)

10/19/2023

Business Education
Partnership & Bluffton
Regional Business Council
[Hilton Head Island](#)

Ribbon Cutting: Holiday Inn
Express Bluffton
[Bluffton](#)

Conversation + Cocktails at
Holiday Inn Express Bluffton
[Bluffton](#)

10/25/2023
Leadership Alumni Event -
Zach Green
[Hilton Head Island](#)

Business Workforce
Coalition
[Hilton Head Island](#)

10/26/2023
Chamber Young Professionals
Networking at Deano's Wood
Fired Grill
[Hilton Head Island](#)

10/27/2023
Ribbon Cutting:
Bluffton Candle
[Bluffton](#)

10/31/2023
Power Hour Tele Town Hall
[Virtual](#)

NOVEMBER

11/08/2023
Jr. Leadership Class Day -
Community Leadership
[Bluffton](#)

11/9/2023
Public Policy
Committee Meeting
[Hilton Head Island](#)

11/10/2023
Ribbon Cutting:
Marsh on the May
[Bluffton](#)

11/15/2023
Leadership Class Day -
Town of Bluffton Government
[Bluffton](#)

Conversation + Cocktails:
Celeste Coastal Cuisine
[Hilton Head Island](#)

11/16/2023
Business Education Partnership
& Bluffton Regional Business
Council
[Hilton Head Island](#)

11/22/2023
Business Workforce Coalition
[Hilton Head Island](#)

DECEMBER

12/1/2023
State of the Region
[Hilton Head Island](#)

12/6/2023
Jr. Leadership Class Day -
Communication & Etiquette
[Bluffton](#)

12/8/2023
Sparkles & Spirits
[Hilton Head Island](#)

12/13/2023
Leadership Class Day -
Lowcountry Economy
[Hilton Head Island](#)



Media Impressions and the Dollar Equivalent

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

2,138

STORIES & MENTIONS

6,376,960,959

MEDIA IMPRESSIONS

\$21,028,150.43

AD EQUIVALENCY

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

2023

Stories & Mentions

2,138

Impressions

6,376,960,959

Ad Value

\$21,028,150.43

2022

Stories & Mentions

2,799

Impressions

11,119,754,831

Ad Value

\$21,119,046.34

2021

Stories & Mentions

2,316

Impressions

13,269,706,386

Ad Value

\$11,729,825.10

2020

Stories & Mentions

1,866

Impressions

8,129,666,977

Ad Value

\$19,015,478.70

2019

Stories & Mentions

3,751

Impressions

6,900,983,718

Ad Value

\$21,947,349.50

COVERAGE HIGHLIGHTS

TRAVEL+ LEISURE

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



From left: A replica homestead in Historic Mitchelville Freedom Park, in South Carolina; a historic marker. PHOTO: PHILIP NIX AND MEYRAM BULUCEK/COURTESY OF HISTORIC MITCHELVILLE FREEDOM PARK

During the Civil War, in late 1861, the Union Army captured Hilton Head. While plantation owners fled the advancing troops in boats, hundreds of enslaved people, then considered "contraband of war" by the Union Army, remained on the island. Because of Hilton Head's remoteness (the first bridge to the mainland wasn't built until 1956), not to mention the thousands of Union soldiers, the Confederate Army was unable to retake the land. In 1862, Union general Ormsby Mitchel worked with the community to establish the town of Mitchelville on the grounds of what had previously been the Fish Haul Creek Plantation. Some 3,000 formerly enslaved people lived in freedom there — a notable feat, considering slavery wasn't abolished until 1865. After the war ended, the departure of the Union Army created a dearth of jobs, causing many residents to leave the island in search of work. The land was returned to the heir of the former owner. By the 1930s, there was nothing left of Mitchelville.

My parents taught me that sharing Black American stories of ingenuity and joy — not just despair and hardship — is powerful, and I pass this message on to my four-year-old son, Langston. One of those stories is about Mitchelville, a town that once stood on South Carolina's Hilton Head Island.

Mitchelville's legacy remains largely unknown outside the Lowcountry. It was the first self-governed town of formerly enslaved people in the United States. From the first time I heard about it, I knew I had to see it, so I flew down from New York for a four-day trip last July.



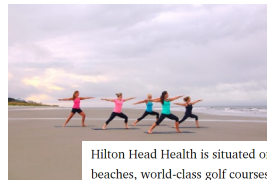
The 21 Best Wellness Retreats in the U.S.

Hilton Head Health: Hilton Head, South Carolina

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

woman's day

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



8

Hilton Head Health on Hilton Head Island, South Carolina

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

COVERAGE HIGHLIGHTS



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

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

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



The Best Off-Season Trips To Plan Now



Hilton Head Island, South Carolina

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



Charleston, South Carolina, to Savannah, Georgia



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

Explore two popular southern cities on one trip with this short-distance getaway. The drive from Charleston straight to Savannah takes just under two hours, but we'd recommend taking a few days for this itinerary so you can stop to enjoy the outstanding hotels and beaches along the way. You can stay at [The Sanctuary on Kiawah Island](#) just an hour south of Charleston, or fill up the tank for a beach day at [Hilton Head](#), which is only an hour further. Once you've passed through Savannah, drive one more hour south for a stay at [The Cloister at Sea Island](#). This five-star resort is another good option for families, with plenty of swimming, fishing, and nature walks.



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

Hilton Head Island, South Carolina



Hilton Head proves that the best bachelorette weekends are often the unexpected ones. Consider an oceanfront Airbnb rental, so you can spend your days soaking up the sun. Later, partake in a wine tasting experience at Island Winery, or grab [summer supper](#) at Skull Creek Boathouse. Before going home, make a final stop at Poseidon's rooftop bar for a digestif and live music. —B.C.



The Best South Carolina Beaches For A Relaxing Lowcountry Getaway



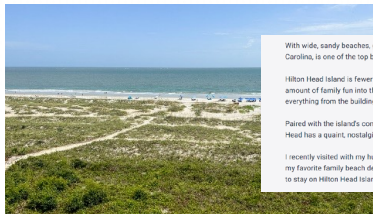
01 of 15 Hilton Head Island

Hilton Head feels like a grown-up beach town, which isn't to say it doesn't still embrace what made it so beloved in the first place: tranquil beaches, real-deal seafood joints, excellent golfing, and Carolina manatees. You might even recognize it as having been awarded the honor of [South's Best Beach Town](#) more than once, which touted many of Hilton Head's best attributes, like how HHI has "matured into a collection of gated neighborhoods surrounded by live oaks, magnolias, and palmettos; linked by neon-free boulevards bordered by bike paths; and boasting clusters of markets, bars, boutiques, and more than 250 restaurants." Doesn't sound half-bad, huh?

[MORE ON HILTON HEAD](#)



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



With wide, sandy beaches, gentle surf and endless outdoor activities, Hilton Head Island, South Carolina, is one of the top beach destinations for families.

Hilton Head Island is fewer than 5 miles wide and only 12 miles long, but it packs a surprising amount of family fun into that small area. The first thing you'll notice about Hilton Head is that everything from the buildings to the signage to the mailboxes blends with its surroundings.

Paired with the island's compact size and beautiful natural beaches, creeks and swamps, Hilton Head has a quaint, nostalgic feel that you don't often find in popular beach destinations.

I recently visited with my husband and three sons, and it immediately went on the short list of my favorite family beach destinations. Here are my recommendations for what to do and where to stay on Hilton Head Island.

COVERAGE HIGHLIGHTS

BEST LIFE

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

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

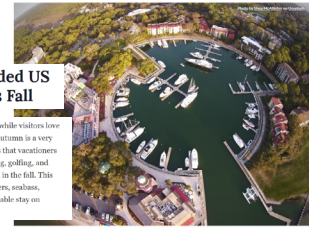
If you're looking for a getaway that will also bolster your physical health, you can head to South Carolina for a revitalizing spa experience. "Hilton Head Health is a wellness gem in an island setting, where guests have personalized experiences designed to rejuvenate the mind, body, and spirit," [Lynn Seiden](#), travel journalist behind *Hidden Ink*, tells *Best Life*. "Located on the South Carolina island, Hilton Head Health offers a number of all-inclusive wellness experiences designed to cater to specific guest needs from 'wellness' to self-care retreats. You can opt for different all-inclusive experiences, including the Retire program, which starts with a one-on-one meeting with a licensed therapist, who then helps you develop your own goals and address "all potential barriers, from stress to diet."

20. Hilton Head Health - Hilton Head Island, South Carolina



THE TRAVEL

Hilton Head Island, South Carolina



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

Hilton Head Island is one of the best hidden gems in the U.S. in the fall, and while visitors love to enjoy the island's pristine beaches, hiking, and boat rides in the summer, autumn is a very special time to explore it. The island is surrounded by brilliant autumn colors that vacationers can explore through hiking and taking sunset and sunrise walks. Birdwatching, golfing, and shopping are other fun activities to enjoy during a visit to Hilton Head Island in the fall. This island is known for its incredible seafood scene, which provides shrimp, oysters, crab, and more. Book a room at [Coral Sands Resort by Palmetto](#) for a memorable stay on Hilton Head Island in the fall.

TOWN&COUNTRY

The 40 Best Beaches on the East Coast

Hilton Head Island, South Carolina



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

TRAVEL+ LEISURE

11 All-inclusive Resorts Perfect for a Girls Trip

04 | Hilton Head Health

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

Parents

11 Best Family Beach Towns for Your Next Vacation



SEAN RAVICH/GETTY IMAGES

1. Hilton Head Island, South Carolina

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

TRAVEL PULSE

2023 Travel Guide to the United States

Best Places for Couples

Hilton Head Island, South Carolina

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



OUTDOORS WIRE

Celebrate National Lighthouse Day with these 20 US lighthouses

Hilton Head Island, South Carolina

[Climb](#) 114 steps to the top of this candy-striped tower for island views.

redbook

The Best Road Trips from Florida



6

Hilton Head, South Carolina

[Hilton Head](#) is a beautiful island town located in the Lowcountry region of South Carolina. It is known for its stunning beaches, world-class golf courses, and upscale resorts. Aside from golf, other activities include kayaking, hiking, biking and simply sunbathing on the beach with a margarita in-hand. This is a mandatory stop for seafood lovers as cuisine is freshly caught hours before it is served to your table. With many hotels, travelers also rent beachfront properties equipped with full kitchens to feel right at home.

COVERAGE HIGHLIGHTS



Where to Go on the Perfect South Carolina Lowcountry Vacation

Beaches, Golf, and More on Hilton Head Island



View of Hilton Head in South Carolina's Lowcountry (Photo: Hilton Head Island)

Many people know [Hilton Head](#) as a world-class [family beach vacation spot](#) and [golf destination](#), but there's much more to do while on island time. You can soar to new heights and catch panoramic views from above with a [parasailing flight at \\$200 Sports](#), or take the [Gullah Heritage Trails Tour](#) featuring guides of Gullah heritage that share the important history and stories of this West African-based culture. There's also [The Gullah Museum of Hilton Head Island](#) to visit.



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

The South Carolina coast



Coligny Beach Park, Hilton Head Island, South Carolina. MARGARET W. GETTY IMAGES

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

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

Later, chow down on authentic Gullah cuisine at Ruby Lee's, or enjoy seafood at Skull Creek Boathouse. Book a night at an amenity-filled beach resort like Omni Hilton Head Oceanfront Resort (from \$280 per night), or if you have Marriott Bonvoy points to burn, check out the Westin Hilton Head Island Resort & Spa (from \$339 or 40,000 points per night).

BAZAAR^{Harper's}

Try These Affordable Summer Getaways In The US

Enjoy your vacation without shattering the bank.

6

Hilton Head, South Carolina



JAMES L. AMOS // GETTY IMAGES

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

For waterfront views and local history, dine at [Hudson's on the Docks](#), a waterfront restaurant which is one of the only two remaining local fishing fleets on the island that brings in fresh-caught seafood from the docks to the table. Rent a bike or many hotels provide one for you to navigate 60 miles of trails and hidden routes in the lowcountry.

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

COVERAGE HIGHLIGHTS

Fodor's Travel

12 Classic American Summer Towns That Are Also Perfect Winter Escapes



4 OF 12
Hilton Head Island

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

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

redbook

Check Out These Underrated Spring Break Destinations

12

Hilton Head Island, South Carolina



Home to world class golf courses, beautiful beaches, nature preserves and treasured historical sites, [Hilton Head Island](#) is a majestic coastal destination overflowing with Lowcountry adventures. For seafood enthusiasts, you may just try some of the freshest dishes you've ever tasted.

Where to stay: [Beach House Hilton Head Island](#) features rooms with ocean views, a lagoon style pool and live events at the iconic Tiki Hut. It's the only toes-in-the-sand bar on the entire island.

TRAVELPULSE

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



Golf Traveler's Paradise

Golf enthusiasts will be in heaven on Hilton Head Island, as the destination is home to 24 world-class golf courses. Whether you're a seasoned pro or a beginner, there is a course suited to accommodate your style of play.

Of course, some courses certainly stand out more than others.

Harbour Town Golf Links: Located in the Sea Pines Resort, this course is home to the PGA Tour's RBC Heritage and is consistently ranked as one of the best courses in the country. The course features stunning views of the Calogue Sound and challenges golfers with its narrow fairways and strategically placed bunkers.

Parade

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

[Orchid Paulmeier](#)

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

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

TRAVELPULSE

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

Foodie Traveler's Delight

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

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

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



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

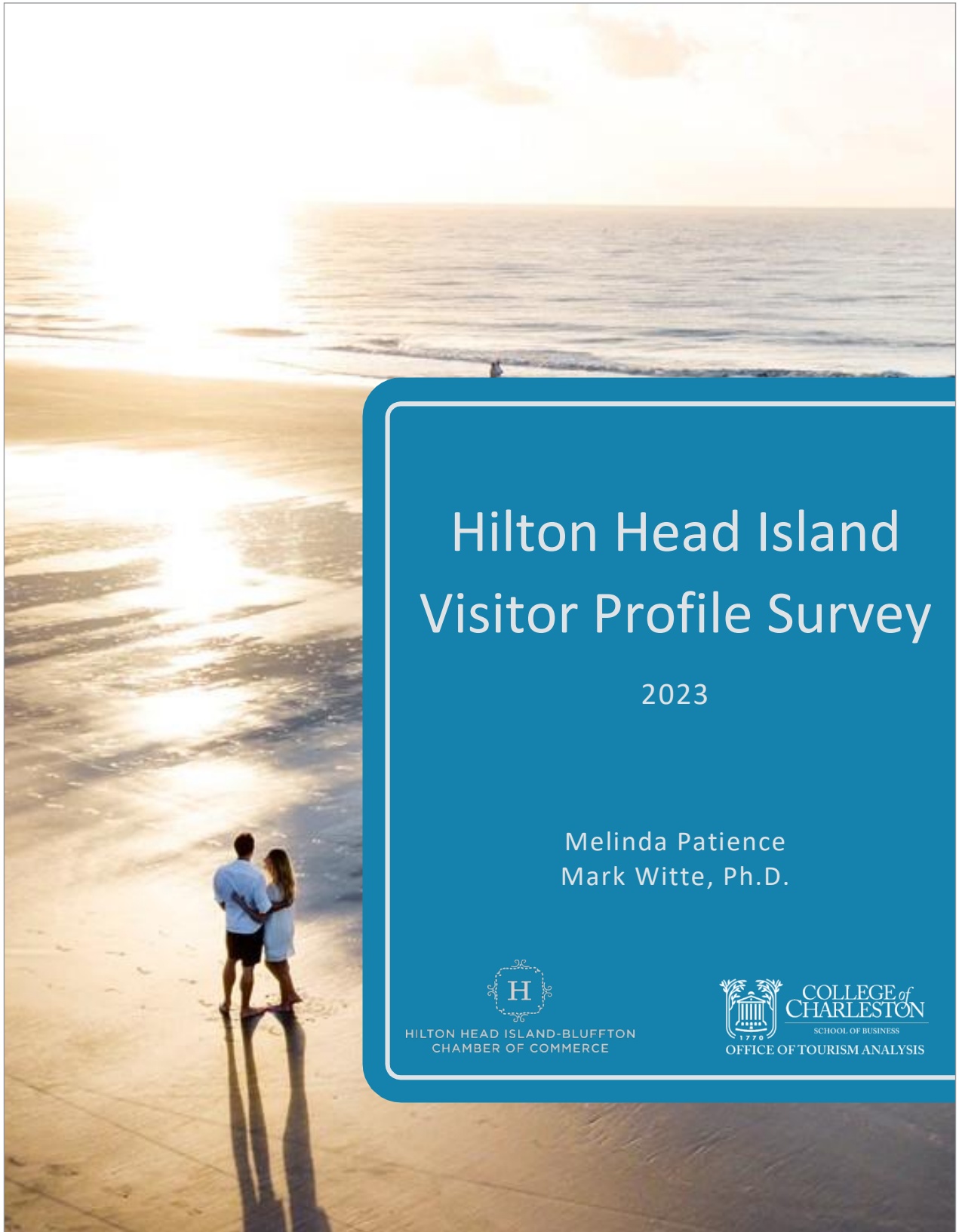
COVERAGE HIGHLIGHTS

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	

Appendix



PREPARED FOR:
HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

BY:
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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%), biking (17.4%), culinary experiences (14.3%), and shopping (14.3%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include water excursions, museums, and wellness activities.

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

TRIP CHARACTERISTICS

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

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

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

**TRAVEL PLANNING**

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

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

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

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

NON-VISITORS

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

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

TRAVEL BEHAVIOR

Looking at the travel behavior of both visitors and non-visitors together, the majority (50.6%) take two to four leisure/vacation trips per year, and they are most likely to travel between May and October. The top five most appealing experiences for leisure trips/vacations were: relaxation & rejuvenation (72.2%), beaches (71.2%), passive outdoor adventures (63.7%), historic attractions (0.9%), and romantic couple getaways (60.8%).

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



METHODOLOGY

The 2023 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2023 and January 2024, 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 1,710 completed surveys were collected. This report is based largely on the 1,115 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 three times this study was completed, examining visitation in 2019, 2021, and 2022. 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, 2022, and 2023. The estimates are based on secondary data for hotel, timeshare, and villa visitors, as well as primary data collected regarding second homeowners, their guests, and day trippers.

Visitor Segment	2021	2022	2023	Change (%) vs 2021	Change (%) vs 2022
Villa/Home Rentals	962,686	951,126	920,345	-4.4%	-3.2%
Hotels/Resorts	508,977	497,574	481,328	-5.4%	-3.3%
Timeshares	481,934	481,461	477,628	-0.9%	-0.8%
Second Homeowners	719,302	710,673	674,278	-6.3%	-5.1%
Non-paying Guests	186,667	184,428	174,983	-6.3%	-5.1%
Day trippers	267,290	264,083	255,358	-4.5%	-3.3%
Total Visitors	3,126,856	3,089,346	2,983,919	-4.6%	-3.4%

Table 1: Visitor Estimates for 2021-2022 and Percent Change Comparison



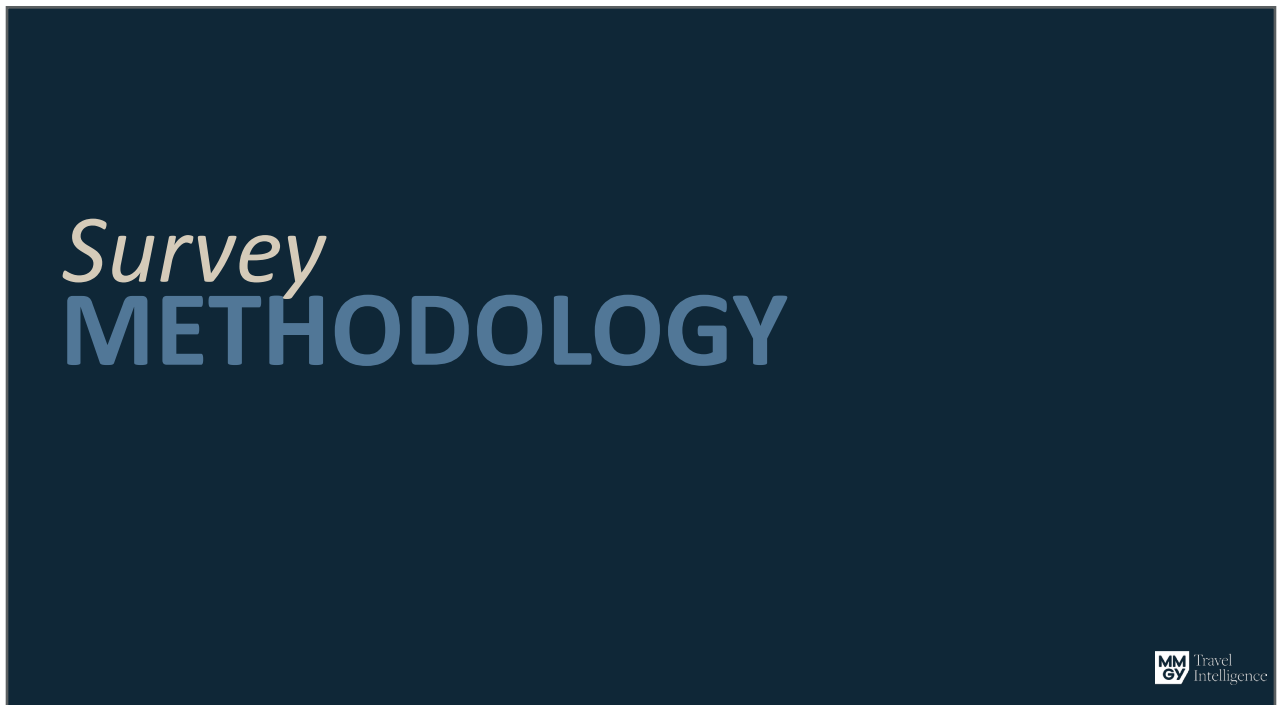
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SURVEY FINDINGS**SAMPLE DEMOGRAPHICS**

	2019	2021	2022	2023
Gender				
Female	67.4%	62.5%	48.8%	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

***Community Sentiment Survey
Wave 3 Executive Summary,
MMGY Travel Intelligence***

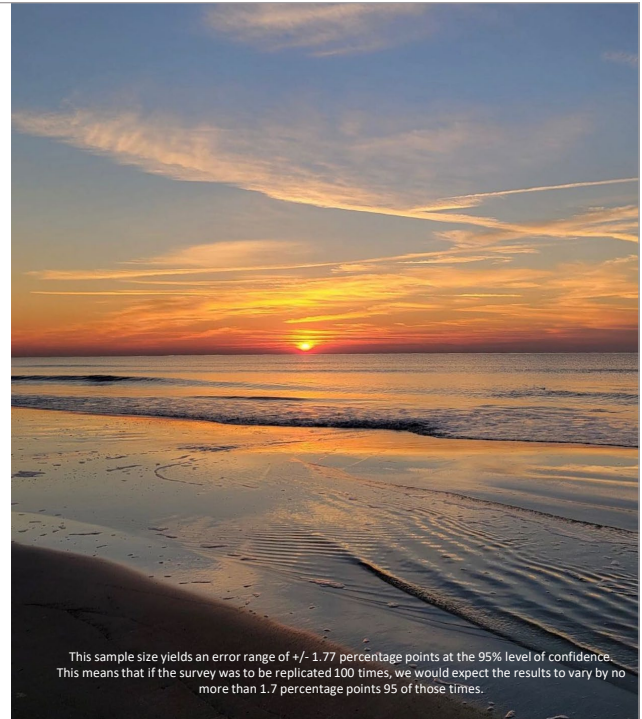


Survey Methodology

- 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.

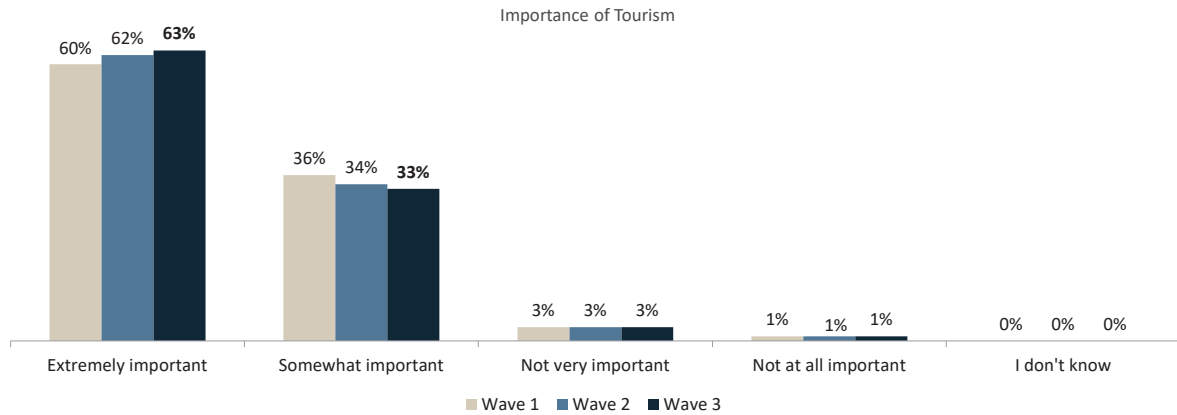
Throughout this report, data in bold indicates a significant difference.



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.



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



Key Insight #1

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%

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



Key Insight #1

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.

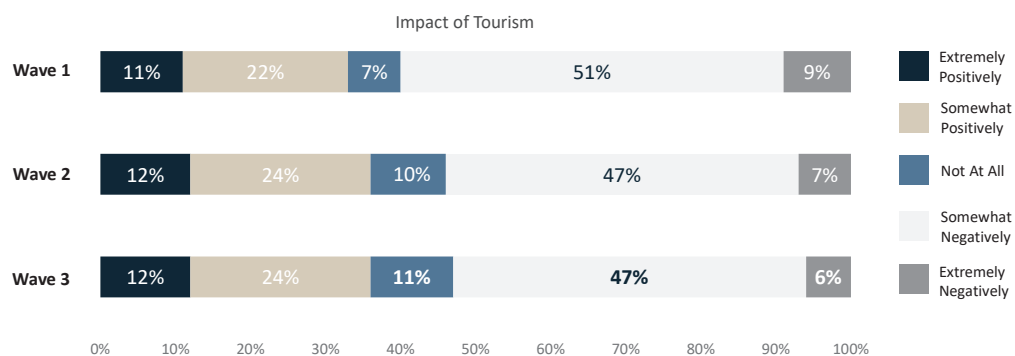
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely important	63%	71%	62%
Somewhat important	33%	26%	35%
Not very important	3%	3%	3%
Not at all important	1%	0%	1%
I don't know	0%	0%	0%

Key Insight #1

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



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?



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

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

Key Insight #1

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



- 9 -

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

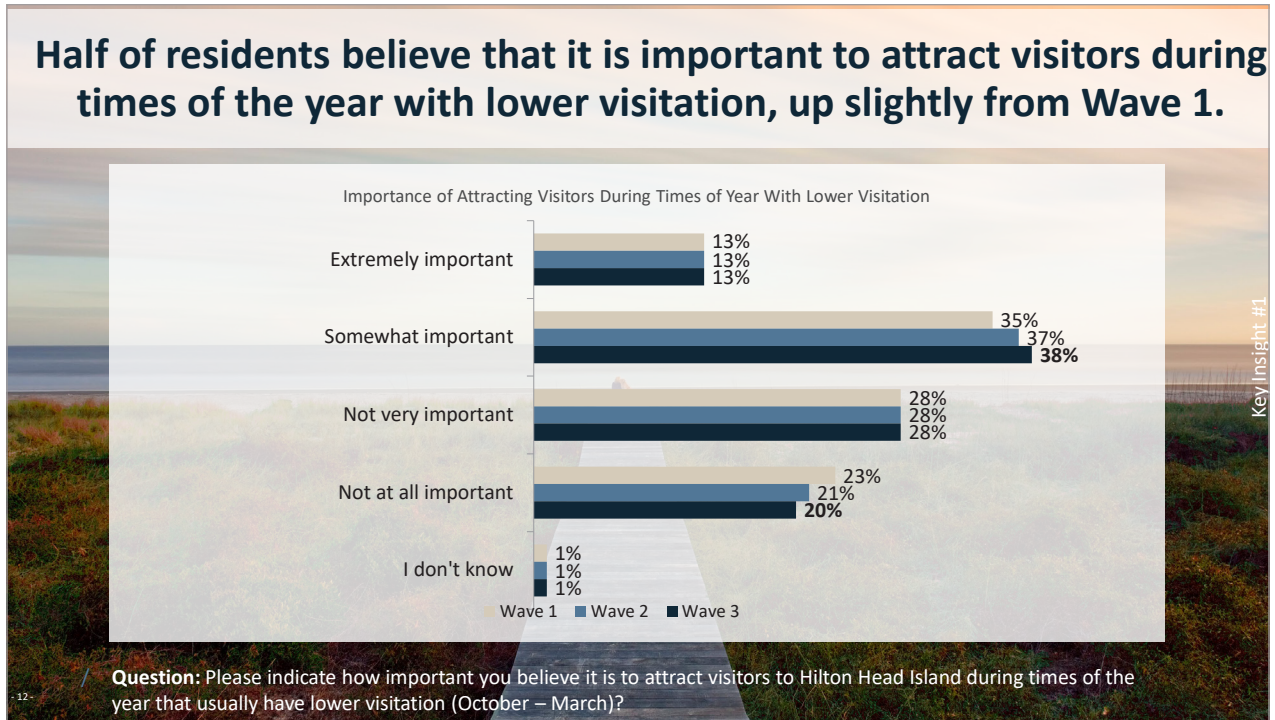
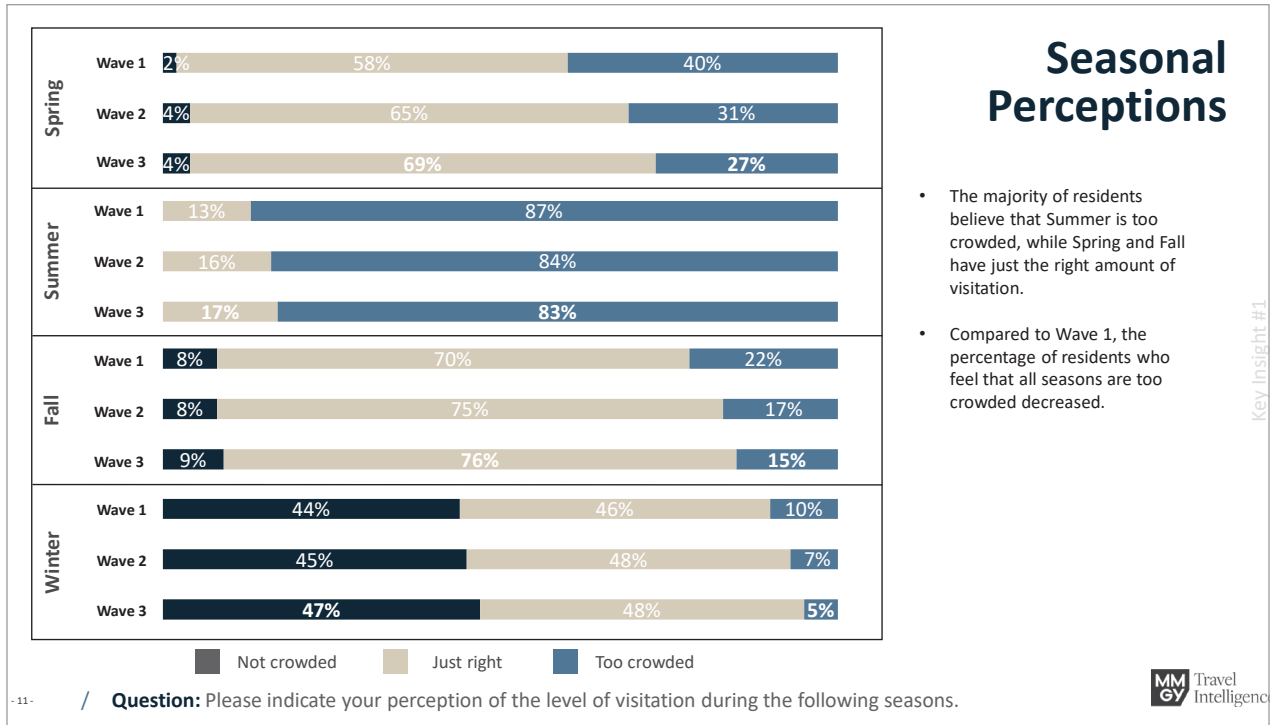
By Employment Status	Currently work on Hilton Head Island	Currently work elsewhere	Retired
Extremely positively	16%	17%	9%
Somewhat positively	25%	27%	24%
Not at all	8%	14%	11%
Somewhat negatively	43%	39%	51%
Extremely negatively	8%	3%	6%

Key Insight #1

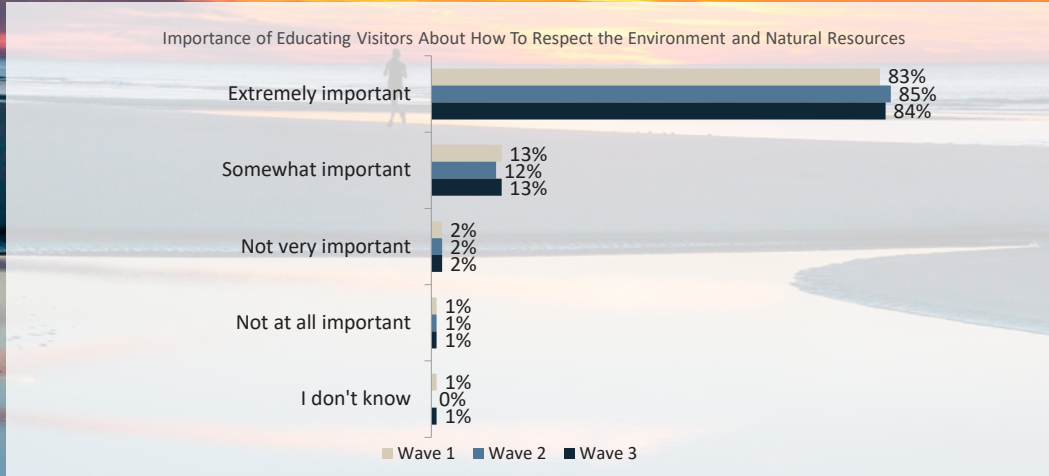
/ **Question:** How would you say Hilton Head Island tourism impacts your life as a resident?



- 10 -



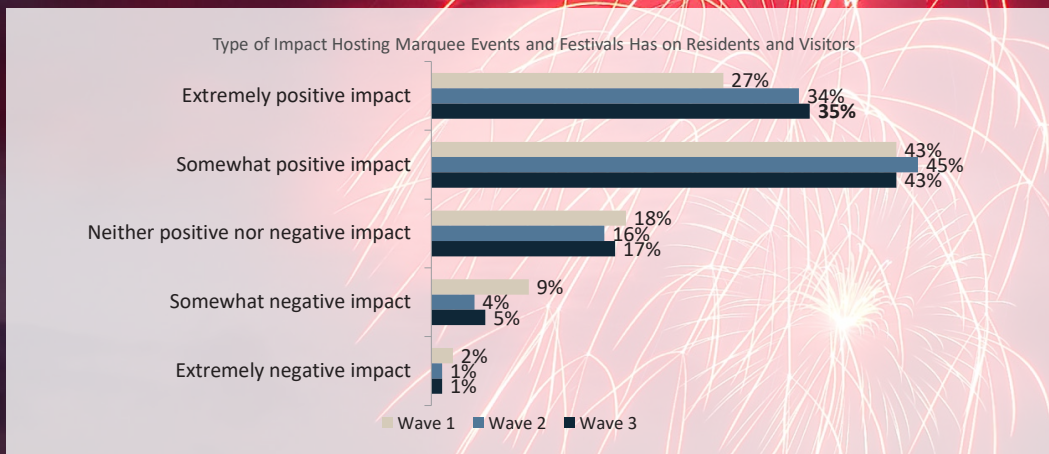
Nearly all residents believe it is important to educate visitors about how to respect the environment and natural resources when they visit, unchanged from previous waves.



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:



- 15 -



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, 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...



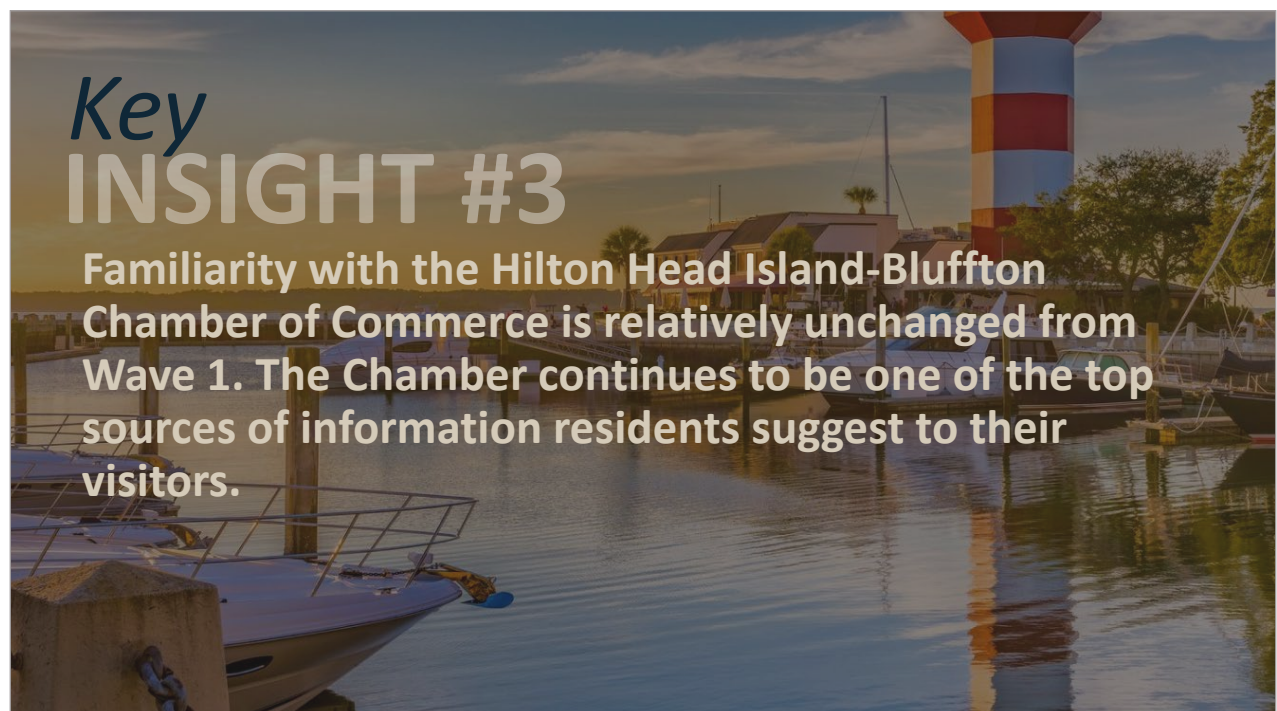
Key Insight #2

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 ambience/vibe in the local community	33%	37%	38%

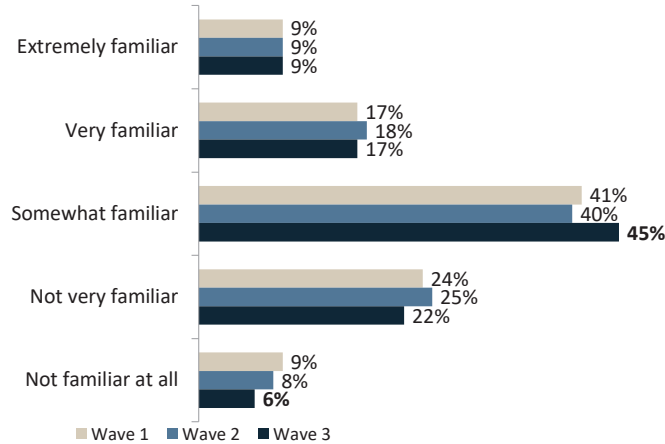
Key Insight #2

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



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



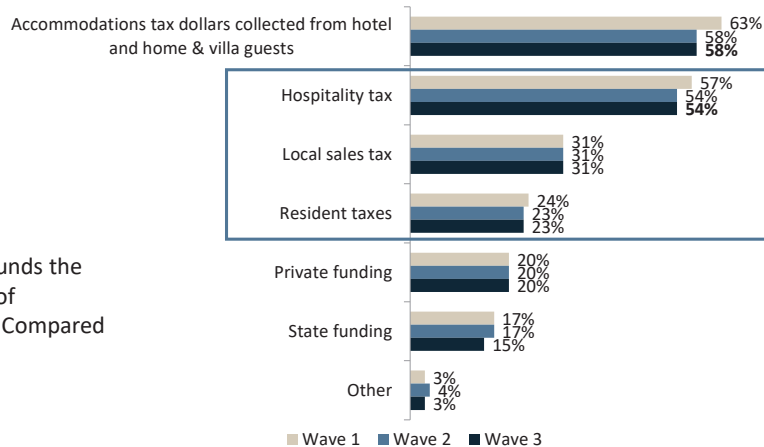
Question: To what extent, if at all, are you familiar with the Hilton Head Island–Bluffton Chamber of Commerce, the local organization responsible for marketing tourism for Hilton Head Island?

MMGY Travel Intelligence

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.

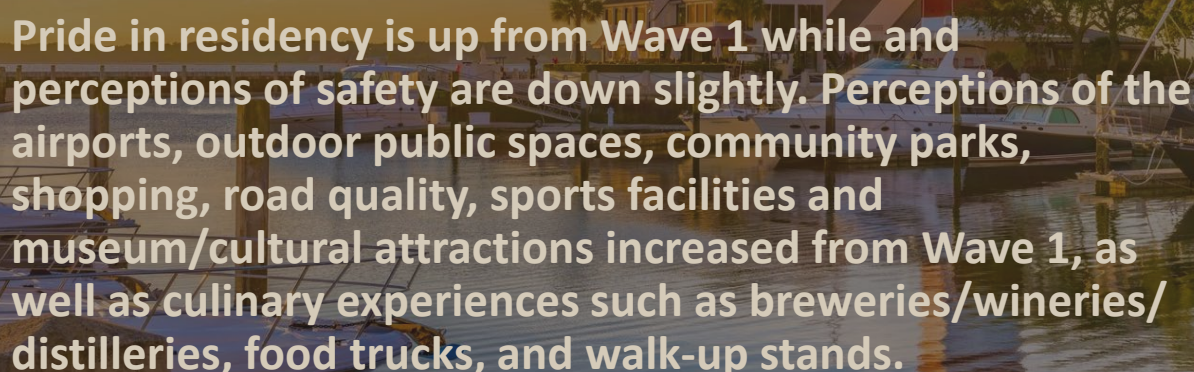


Question: Which of the following do you believe funds the Hilton Head Island–Bluffton Chamber of Commerce tourism marketing efforts? Please select all that apply.

MMGY Travel Intelligence

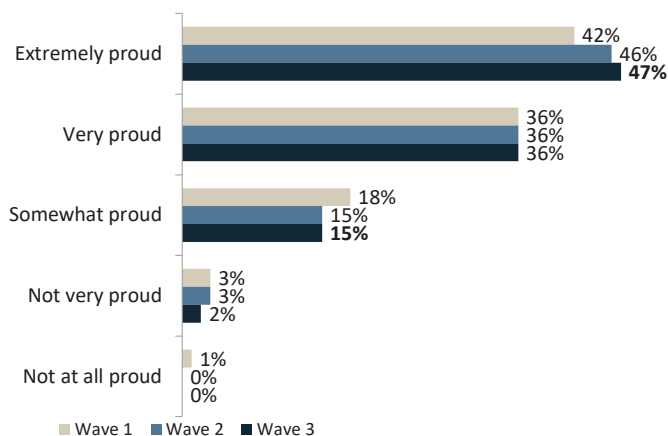
34% Wave 3

Key INSIGHT #4



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

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



Key Insight #4

- 27 -

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

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.

MMGY Travel Intelligence

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%

- 29 -

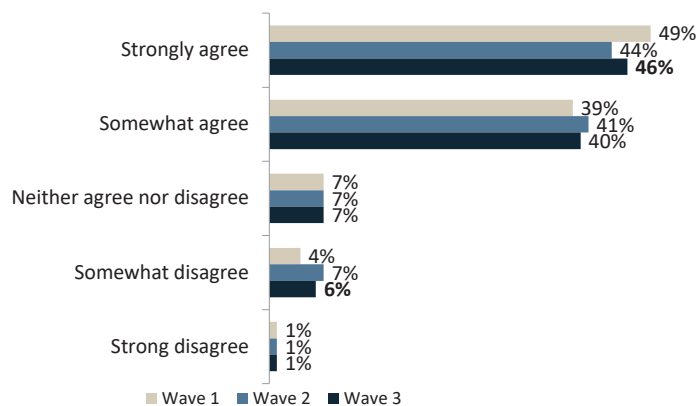
/ **Question:** Please indicate the level of pride you feel in being a resident of Hilton Head Island.

MMGY Travel Intelligence

Key Insight #4

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."



- 30 -

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

MMGY Travel Intelligence

Key Insight #4

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

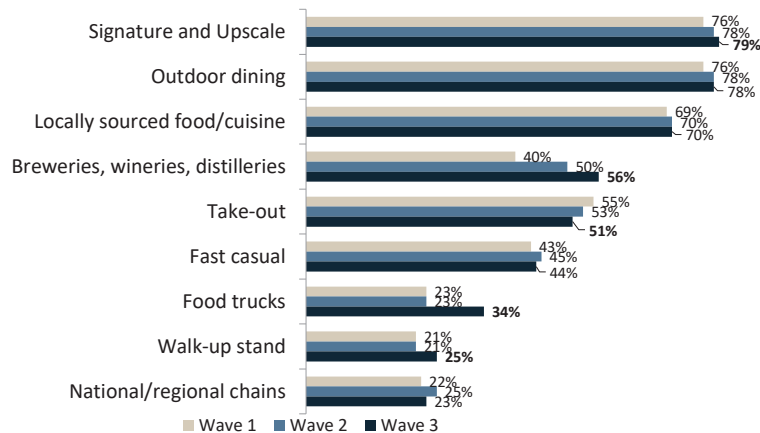
Question: Please indicate your perception of the quality of the following services, products and infrastructure on Hilton Head Island to serve visitors and residents alike.



Key Insight #4

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

Dining Options in Hilton Head Island Perceived To Be High Quality



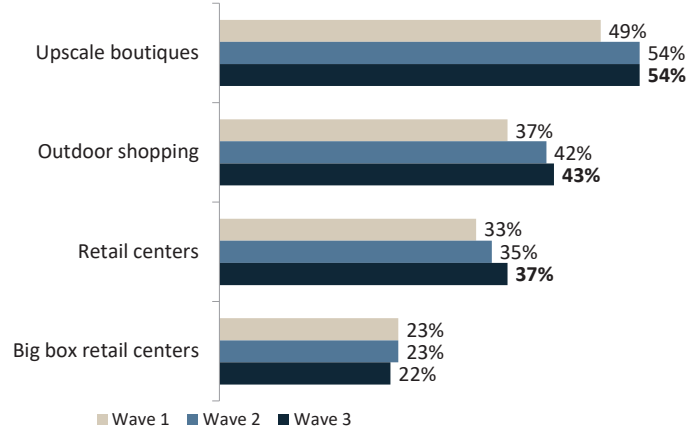
Question: Please indicate your perception of the quality of each of the following categories of dining and restaurant options on Hilton Head Island.



Key Insight #4

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

Shopping Options in Hilton Head Island Perceived To Be High Quality



Key Insight #4

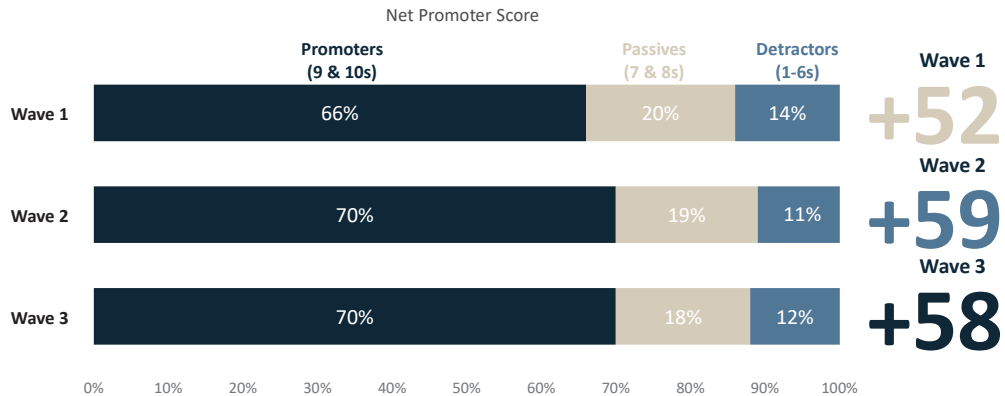
Question: Please indicate your perception of the quality of each of the following categories of shopping on Hilton Head Island.



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

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

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

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

/ **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

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

83%
Wave 3

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



/ **Question:** Do you consider yourself to be a passionate advocate for Hilton Head Island? / As an advocate, what are your favorite island attributes to share and talk about when recommending Hilton Head Island as a vacation destination?



Key Insight #5

Positive Aspects to Tourism on Hilton Head Island

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

Economic Benefits

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

Amenities

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

Positive Atmosphere

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

Key Insight #5



Negative Aspects to Tourism on Hilton Head Island

Overcrowding

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

Overdevelopment

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

Quality of Visitor

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

Rising Prices

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

Key Insight #5



Top Concerns Facing The Community

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

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

Key Insight #5

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

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



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

Host more arts, festivals and cultural events.

Stay true to its character.

Bring in more dining and shopping options.

Continue preservation and protection efforts.

Provide more workforce housing.

Continue to develop family-friendly offerings.

Modernize the airport and offer more direct flights.

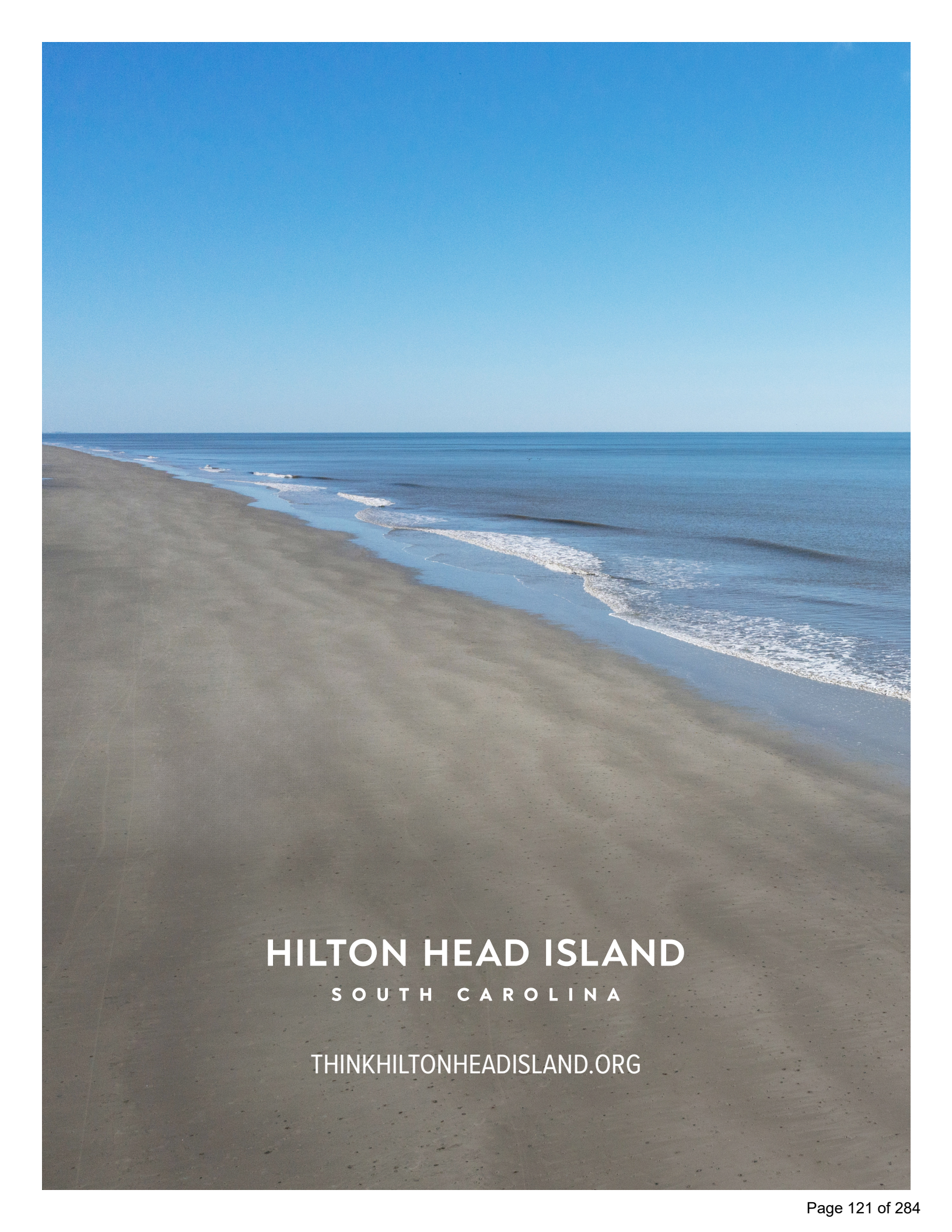
Have stricter controls on rental properties.

Ease traffic flow.

Advertise to a higher income traveler.

Key Insight #5





HILTON HEAD ISLAND

SOUTH CAROLINA

THINKHILTONHEADISLAND.ORG



TOWN OF HILTON HEAD ISLAND

Finance & Administrative Committee

TO: Finance and Administrative Committee
FROM: Jeff Herriman, Treasurer
CC: Marc Orlando, ICMA-CM, Town Manager
Josh Gruber, Deputy Town Manager
Adriana Burnett, Finance Director
DATE: April 2, 2024
SUBJECT: Consideration of Resolution Recommending the 2024-2025
Destination Marketing Organization (DMO) Marketing Plan & Budget

RECOMMENDATION:

Staff recommends the Finance & Administrative Committee consider a resolution recommending the Destination Marketing Organization (DMO) Marketing Plan & Budget for the full Town Council to consider.

BACKGROUND:

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. On or by April 1 of each year, Town Code requires the VCB's proposed budget and marketing plan be submitted to the Accommodations Tax Advisory Committee (ATAC) to review and make a recommendation to Town Council for final approval. The ATAC has recommended to Town Council for consideration. The Finance and Administrative Committee is the standing committee to recommend to Town Council.

SUMMARY:

The purpose of this discussion is to provide an opportunity for Town Council through its Finance & Administrative Committee to discuss the DMO Marketing Plan and Budget from the VCB for Fiscal 2024-2025. The Finance and Administrative Committee is requested to make a recommendation to the full Town Council on a resolution to recommend the Marketing Plan & Budget.

ATTACHMENTS:

1. FY 2024-2025 Destination Marketing Organization (DMO) Marketing Plan & Budget-DRAFT
2. Resolution recommending the DMO Marketing Plan & Budget

An aerial photograph of Hilton Head Island, South Carolina, showing a wide sandy beach, dunes with green vegetation, and a line of buildings in the distance under a clear blue sky.

FISCAL YEAR 2024-2025

HILTON HEAD ISLAND DESTINATION MARKETING PLAN

HILTON HEAD ISLAND
SOUTH CAROLINA

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IT STARTS WITH A VISIT

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

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

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

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



VISION

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

MISSION

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



DEFINING OUR COMMUNITY CORNERSTONE

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

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

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

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

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

DESTINATION VALUES

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



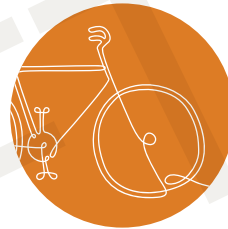
Ecotourism



History



Arts & Culture



Recreation



Wellness

DEMONSTRATING OUR VALUES

ECOTOURISM

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

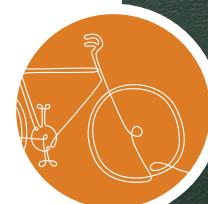
As we look to further establish the destination as a place for heritage travel we will work alongside the community to gather assets, collecting the rich history it holds and documenting it through various touchpoints for visitors to explore. We will also engage our partners within the community and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

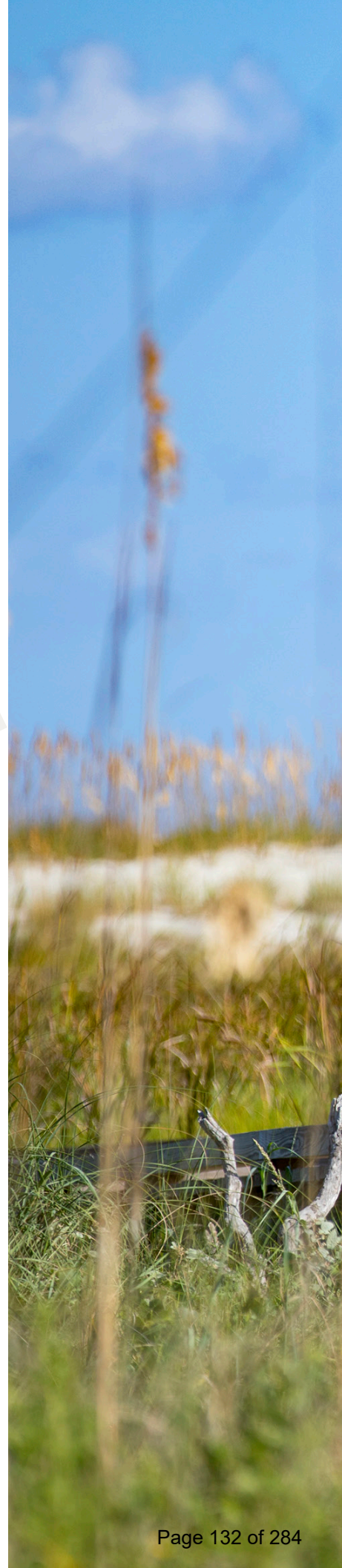
A PLAN OF ACTION. A VISION FOR THE COMMUNITY.

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

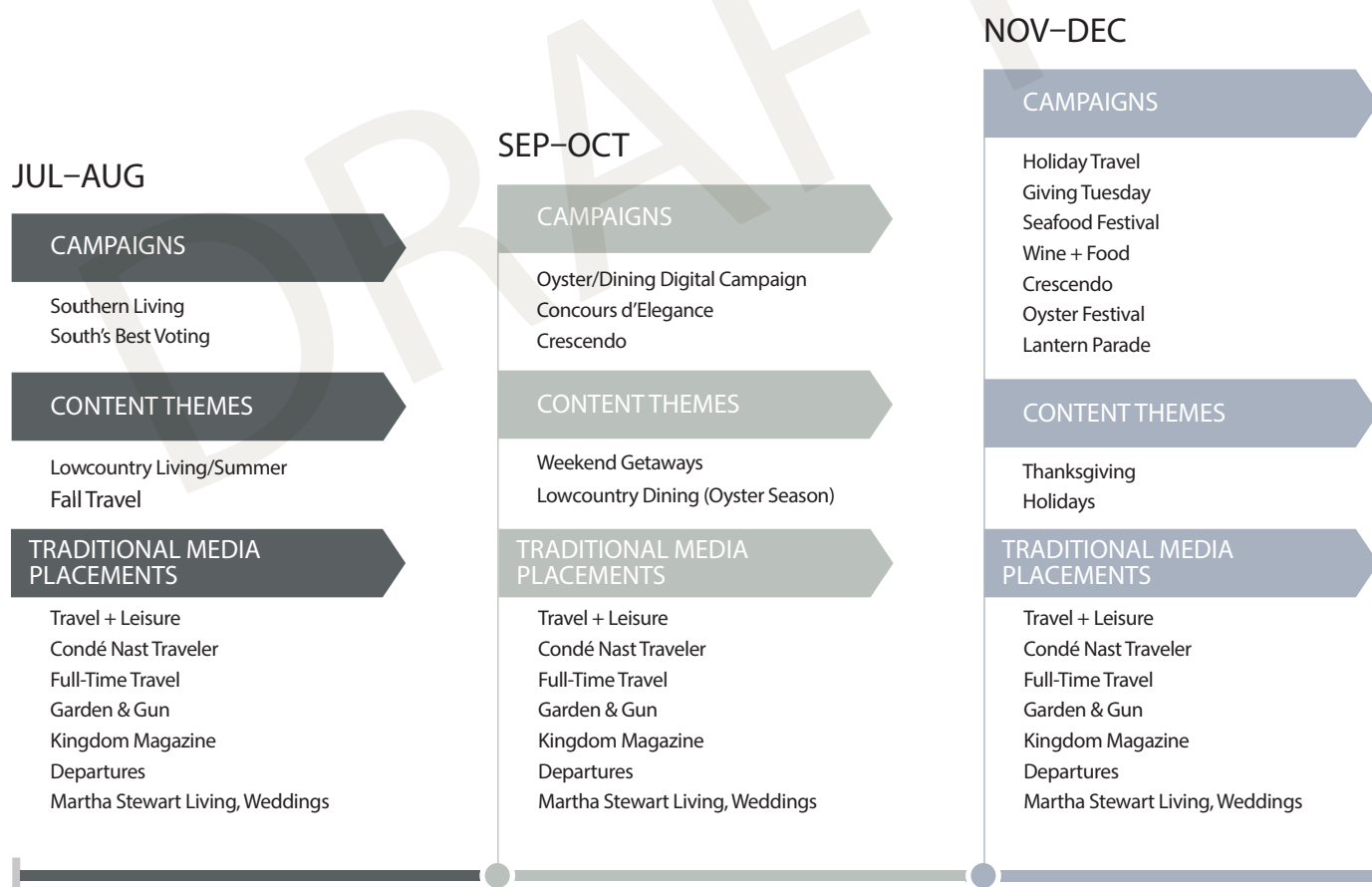
Email list growth of 143,826 (8.9%)
Time spent on blog 3:04 (flat)
Social referrals 345,816 (+12.4%)
Bounce rate 46% (-8.8)
Time on site 1:50 (+2.1%)
Pages per visit 1.8 (+2.2%)
Chatbot engagements 2,685 (+60.3%)

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

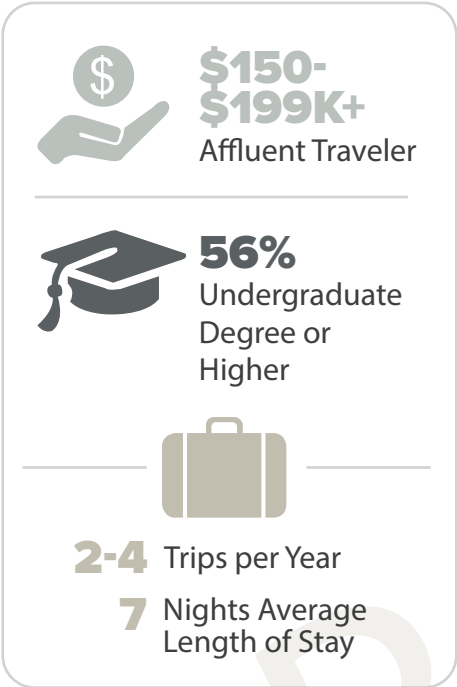
VCB Sales, Mkt. Services & Ops:

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

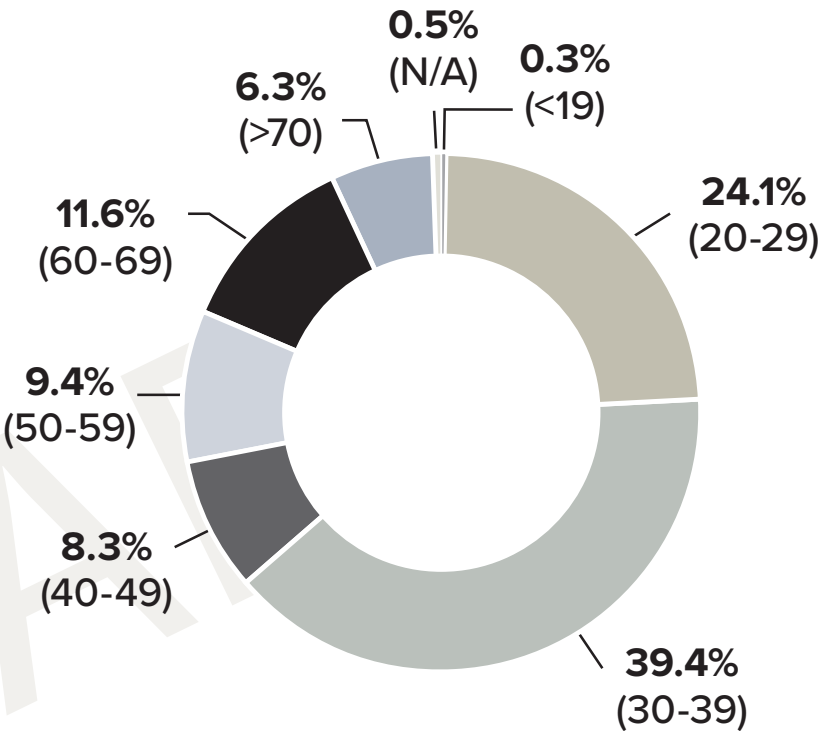
	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co. DMO	Membership
SCPRT								
SC PRT - Leisure	1,300,000				1,300,000			
SC PRT - Sports	1,002,749				1,002,749			
SC PRT - Meetings & Groups	828,500				828,500			
Sub-total	3,131,249				0	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 b/w 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

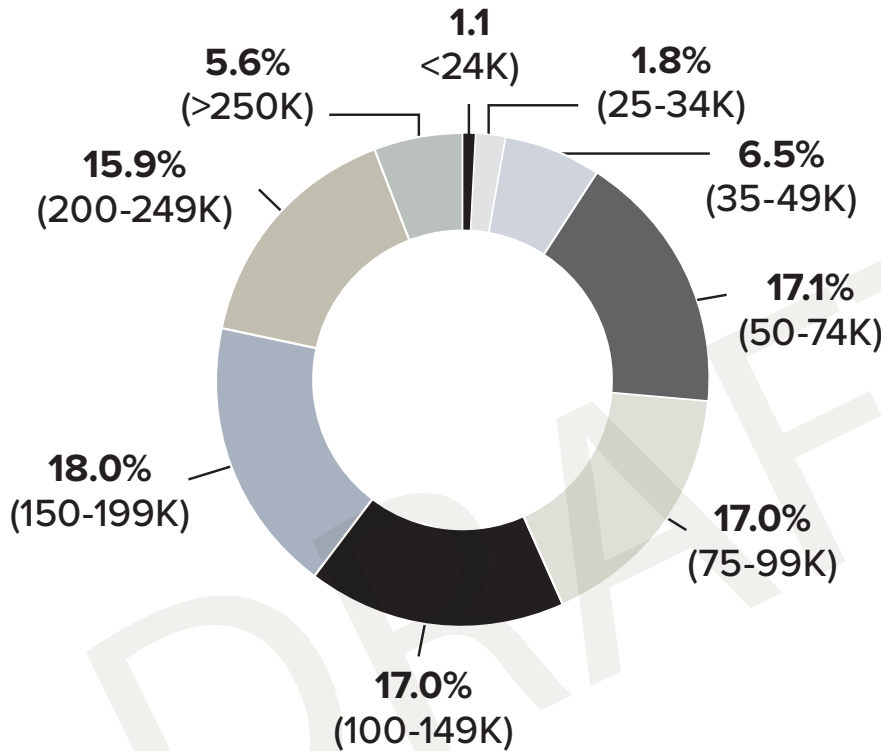


*2023 Visitor Profile Study:
Office of Tourism Analysis,
College of Charleston

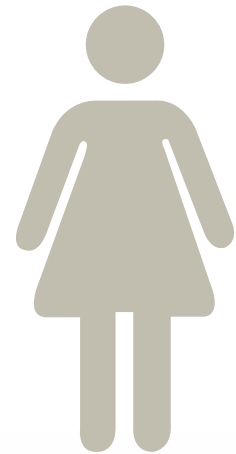
DEMOGRAPHICS AND PERSONAS



HOUSEHOLD INCOME DISTRIBUTION



**45%
MALE**



**55%
FEMALE**



Wellness
Traveler



Arts, History &
Cultural Enthusiasts



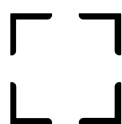
International
Travelers



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.

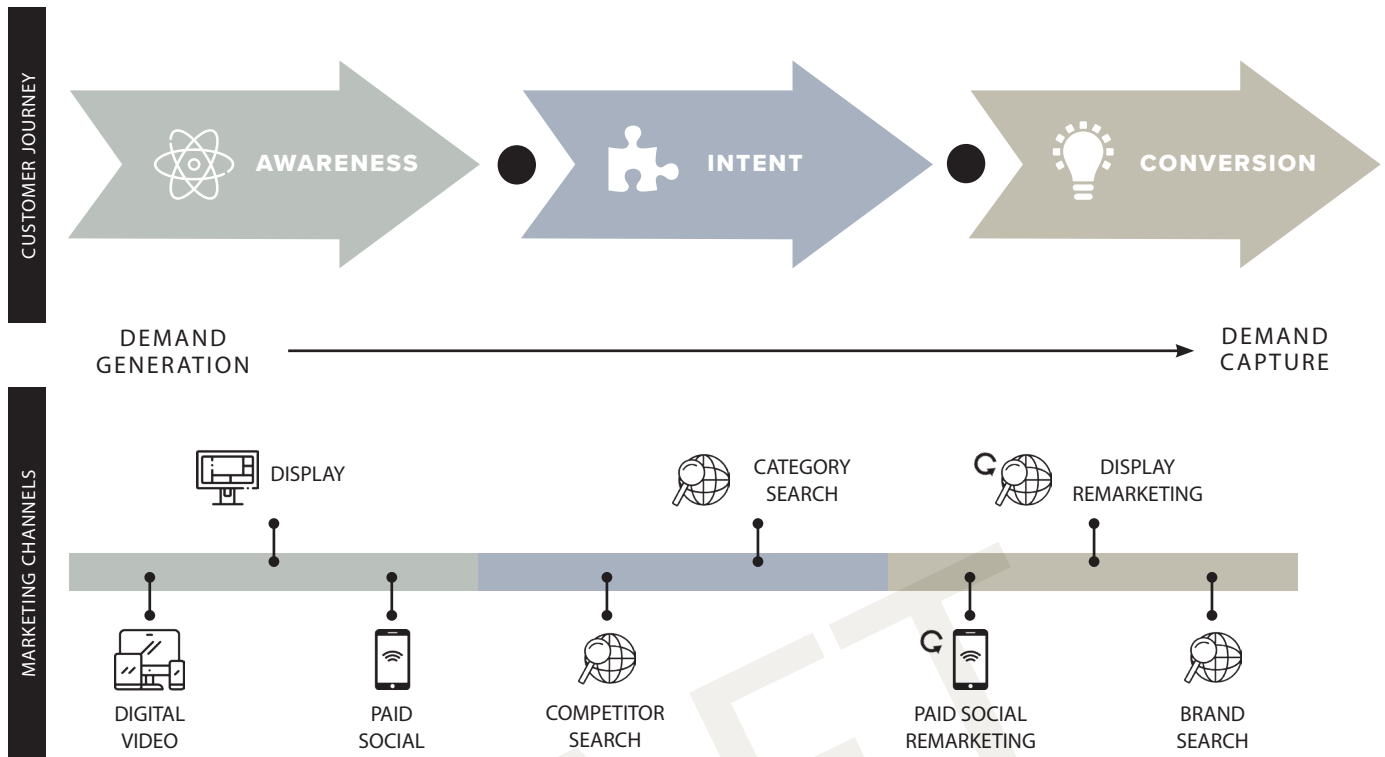
As we embark on this journey, our commitment to excellence remains unwavering. We will continue to listen to feedback, analyze data, and implement innovative solutions to deliver an exceptional online experience that truly reflects the essence of our destination.



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.

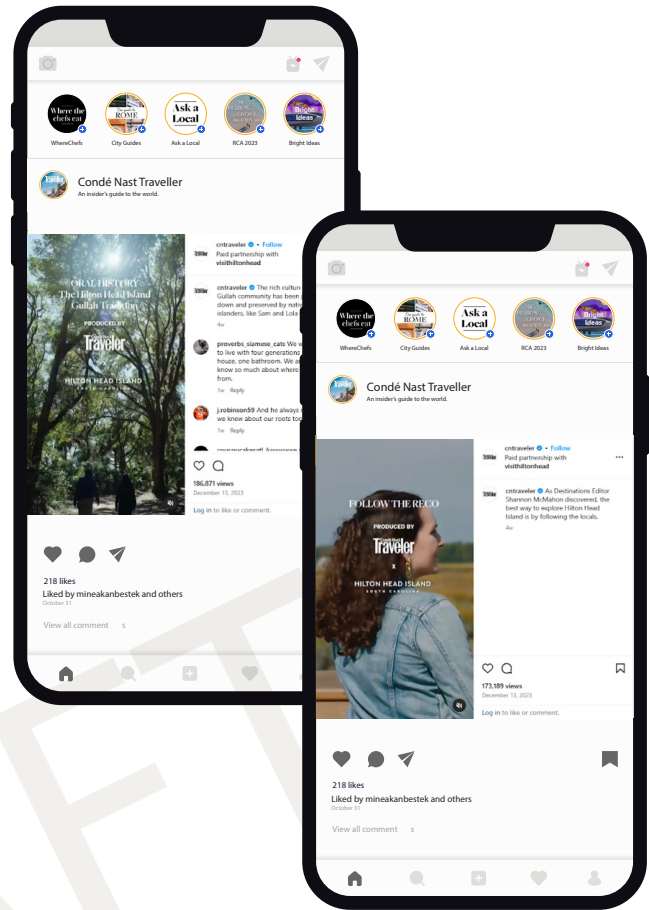


EMAIL

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.

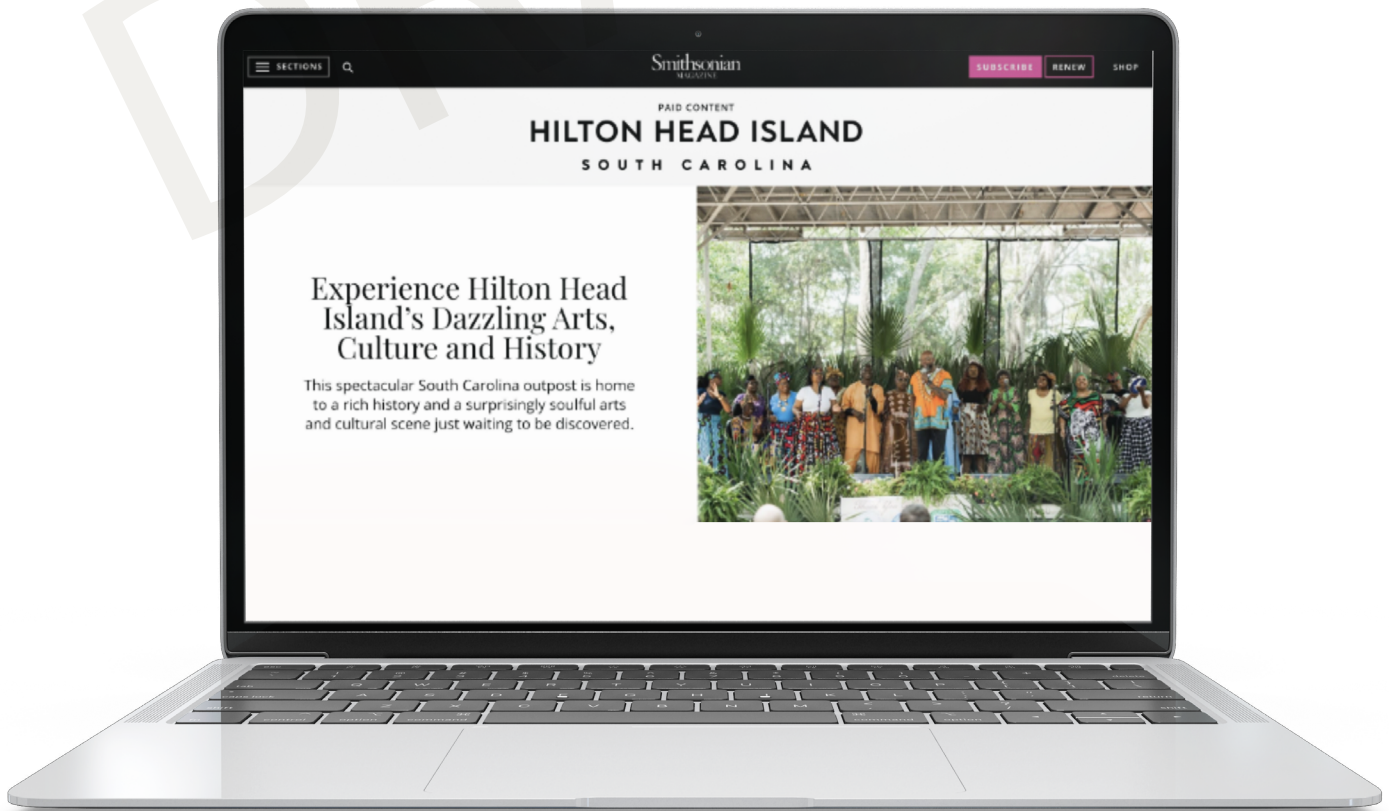
- » For Different Demographics
- » For Different Interests
- » For Different Vacation Lengths

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

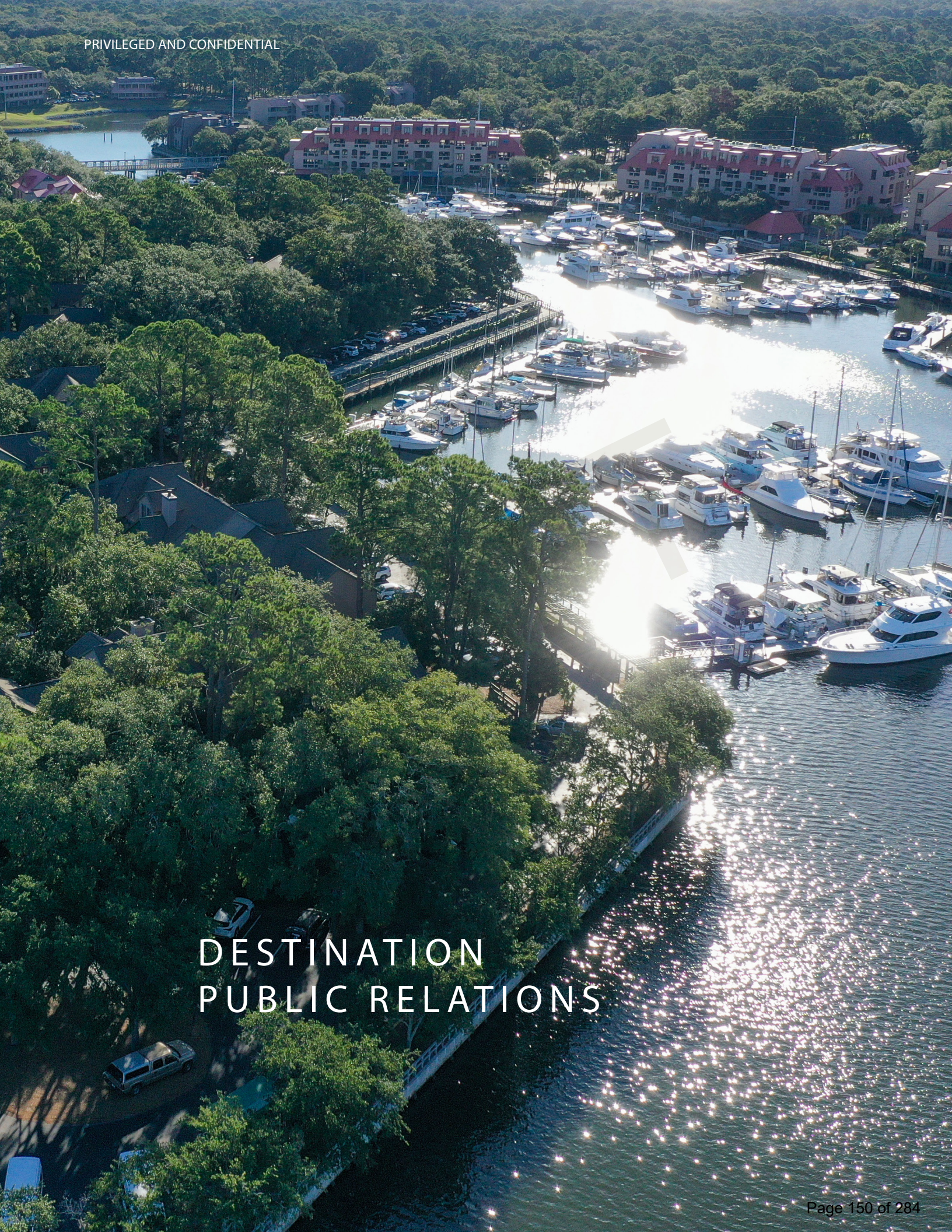
BY THE NUMBERS

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

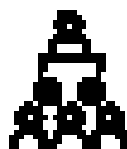
The meetings and group industry continues to recover, and Hilton Head Island offers a unique opportunity for groups of all sizes.

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.



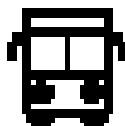
Reunions

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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VP Advancement & Workforce
Development

VICE CHAIR, MEMBERSHIP

Diana McDougall
Coastal States Bank

VICE CHAIR, PUBLIC POLICY

Ahmad Ward
Historic Mitchelville
Freedom Park

VICE CHAIR, BUSINESS EDUCATION PARTNERSHIP

Bob Cosgrove
Sonesta Resort Hilton Head Island

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John McGaunn
Montage Palmetto Bluff

Steve Birdwell
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Chris Corkern
Prudential Services

Walter Nester
Burr & Forman

Wayne Boutwell
Encompass Health Rehab.
Hospital of Bluffton

Berl Davis
Palmetto Electric
Cooperative

Jon Rembold
Hilton Head Island Airport

Andrea Bragg
Forsythe Jewelers

Caleb Graham
Ocean Oak Resort by
Hilton Grand Vacations

Andrew Schumacher
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 Manzolillo
Director of Sales and Marketing
Hilton Beachfront Resort and Spa

Convention Property Seat
OPEN

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

Ecotourism Seat
Mike Overton
Founder & CEO
Outside Brands

Entertainment Seat
Ryan Larson
Director of Marketing
SERG Group

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

Golf Seat
Brad Marra
Chief Operating Officer
Palmetto Dunes Oceanfront Resort

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

Outdoor Recreation/ Sports
Julie Jilly
Vice President
Professional Tennis Registry

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

Retail Seat
Beth Patton
Marketing Manager
Forsythe Jewelers

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

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

Town Council
Councilman Alex Brown
Ward 1

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

Andrew Davis
Marketing & Communications Director
Town of Hilton Head Island

Kelly Spinella
Marketing & Brand Manager
Town of Hilton Head Island

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.

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

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

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

TACTICS

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

Influencer partnerships designed to showcase itineraries based on visitor interest. Work with partners to make these experiences plannable, bookable, and part of a cohesive itinerary.

Immersive itineraries distributed through personalized media and technology platforms.

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

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

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

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

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

Continue the promotion of performing arts and cultural programming.

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

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

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

TIMING



LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber/Private Partner/Town		•		Partner with Town on QR code platform, content creation and strategy for partner placement.
Chamber/Private Partner		•		Influencer partnership secured and itinerary efforts in place for capture.
Chamber/Private Partner			•	Itinerary page sessions, engagement and conversions.

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber		•		Details on how many itineraries have been developed. Report out on number of engagements/sessions for this program.
TCL/ Private Partners		•		Development of a FIC product.
Chamber/Gullah Community		•		Impressions and engagement on platforms where content is placed.

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

LEAD	FY 2024	FY 2025	FY 2026	KPIs
Chamber	•			Completion of shoot Q1 FY23
Chamber	•			Number of locals involved in program/sessions to their content
Chamber		•		Establish an Influencer program: details of campaign, identify talent and budget

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

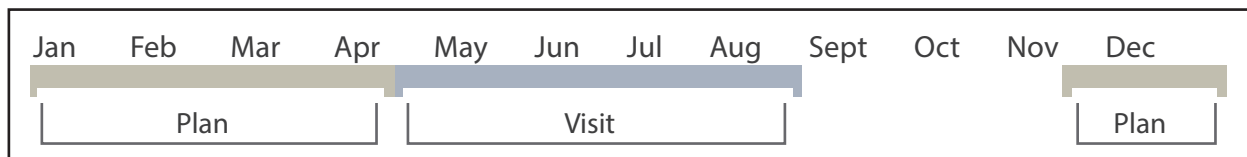
LEAD	FY 2024	FY 2025	FY 2026	KPIs
Town/ Private Sector/ Chamber		•		Engage three rideshare partners.
Town/ Private Sector/ Chamber	•			RFP responses and successful bidding process.
Town/ Private Sector/ Chamber			•	Identification of ways to work alongside rideshare regulations and serve residents and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



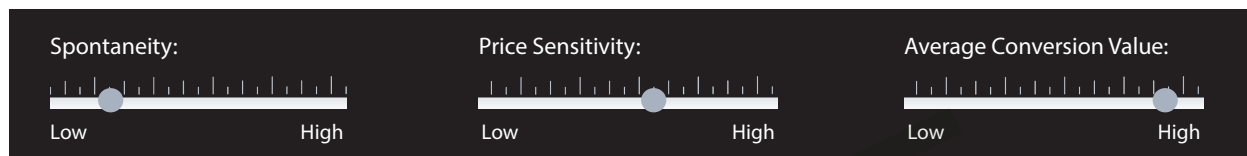
FAMILY

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

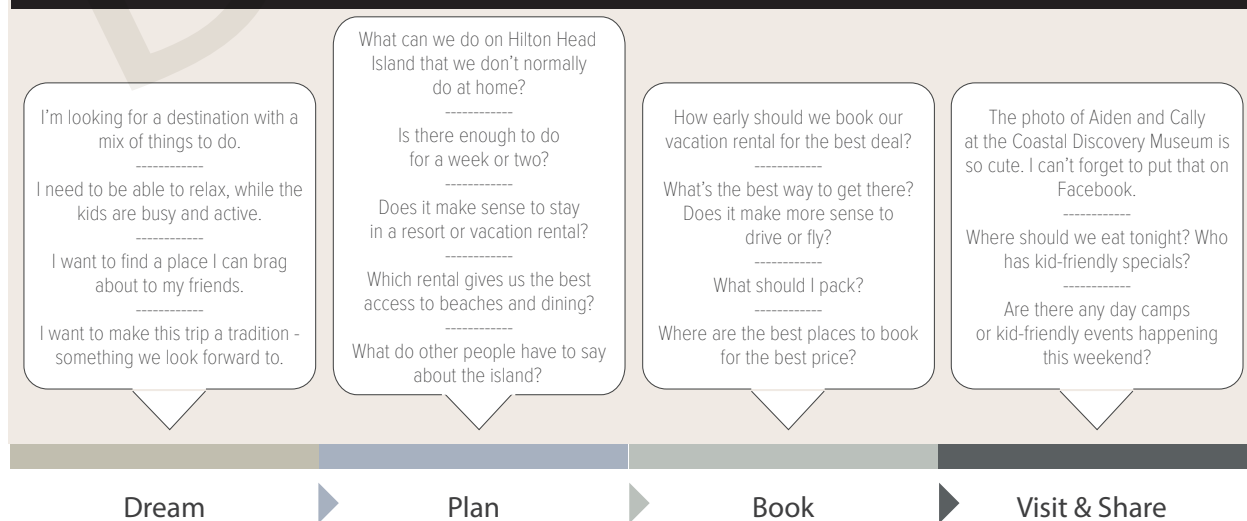
PREFERRED ACTIVITIES & ATTRACTIONS

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

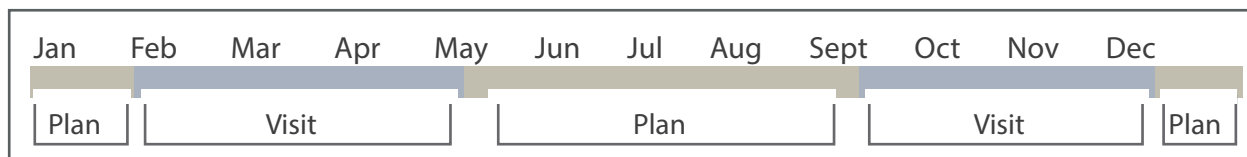




ARTS, HISTORY & CULTURE

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

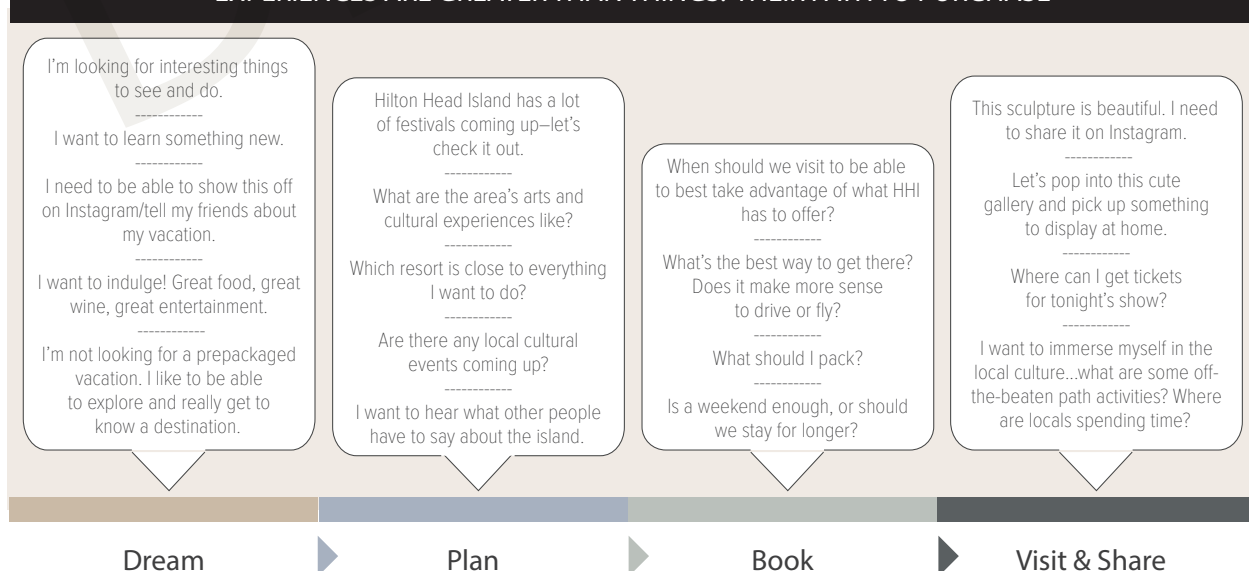
PREFERRED ACTIVITIES & ATTRACTIONS

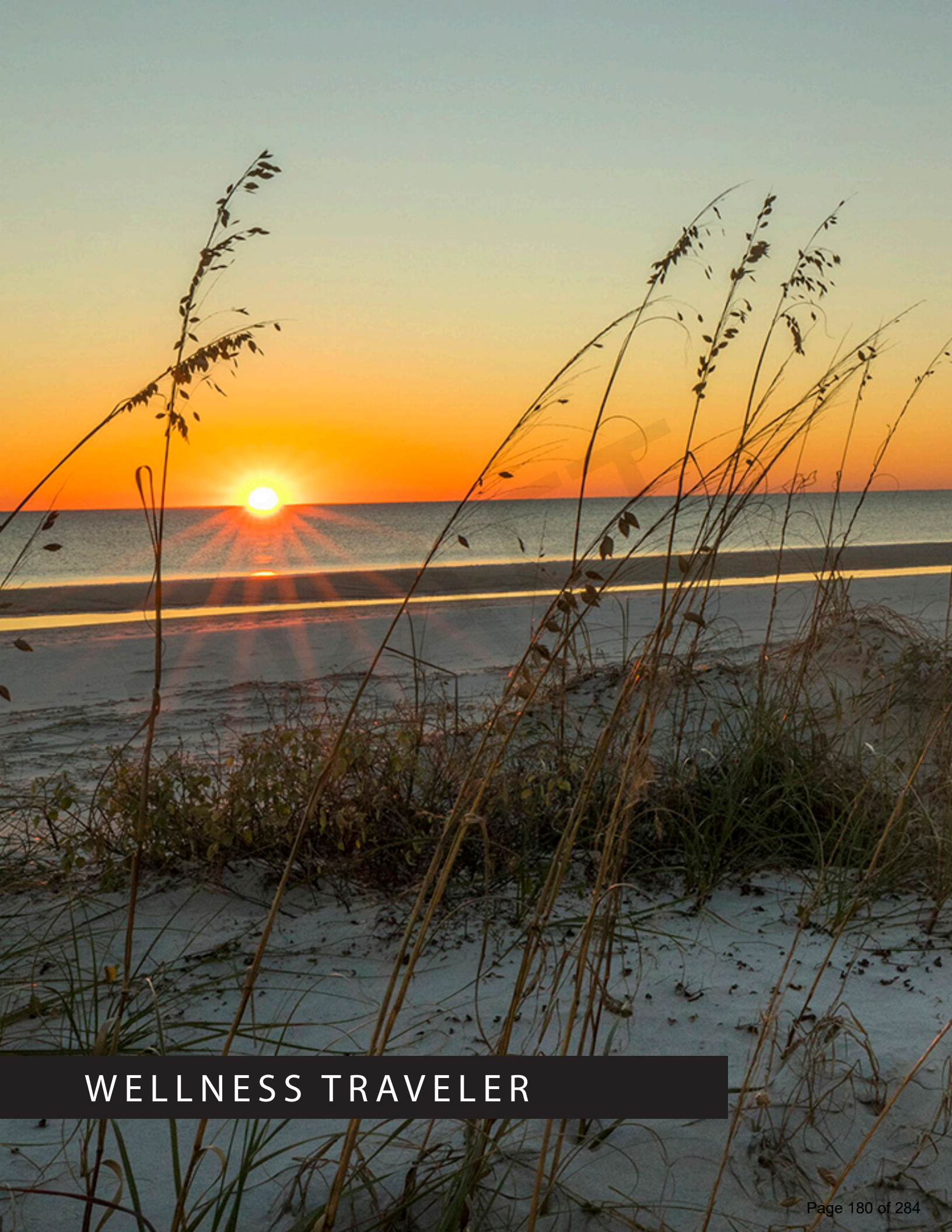
Historical Attractions
Art Galleries
Local Culture
Culinary Experiences
Festivals & Events
Theater
Music

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

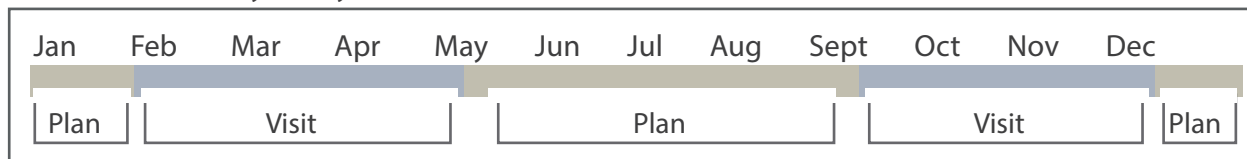




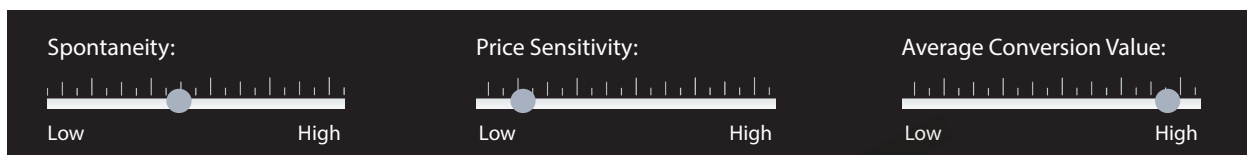
WELLNESS TRAVELER

TRAVEL OBJECTIVE

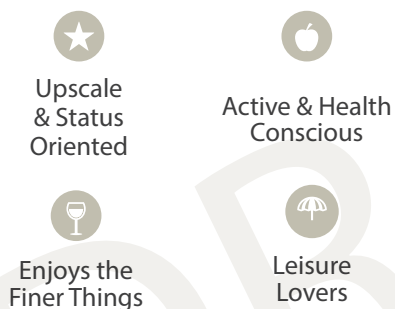
Find a getaway that will accommodate relaxation and rejuvenation, and allow them to prioritize their healthy lifestyle.



ARTS, HISTORY & CULTURE TRAVEL HABITS



WHO THEY ARE



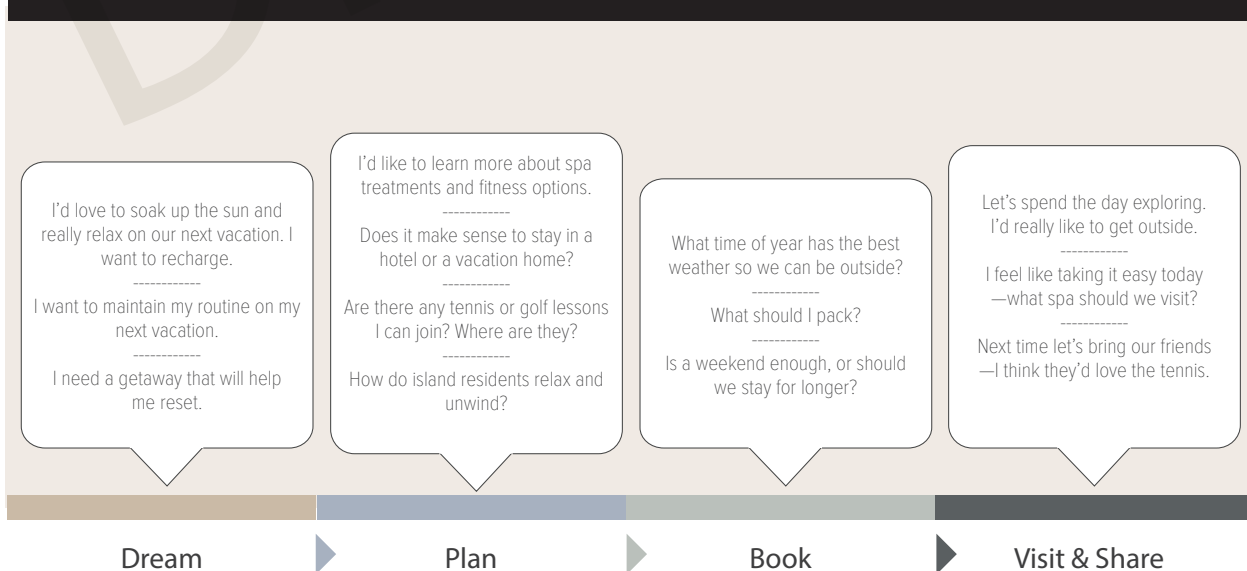
PREFERRED ACTIVITIES & ATTRACTIONS

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

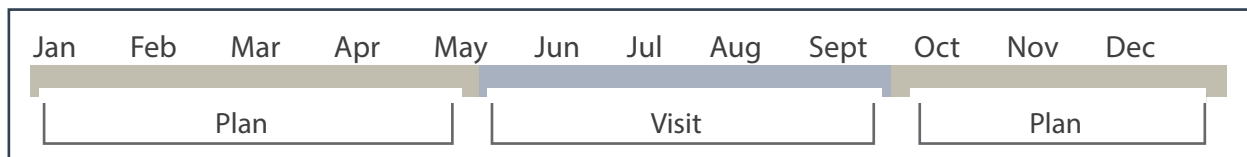




SPORTS ENTHUSIAST

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

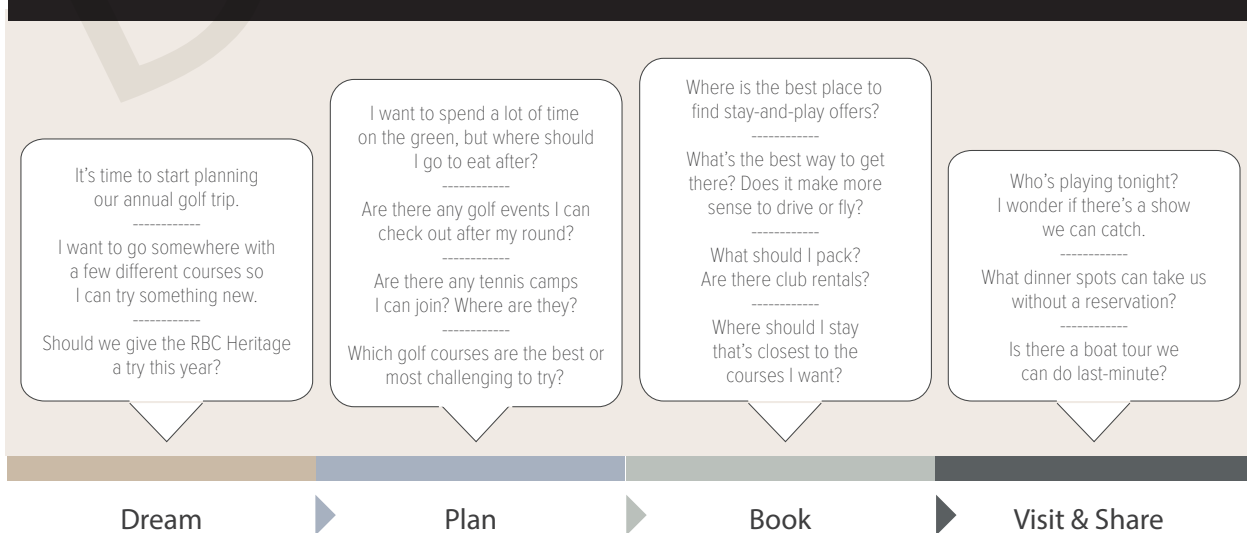
PREFERRED ACTIVITIES & ATTRACTIONS

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

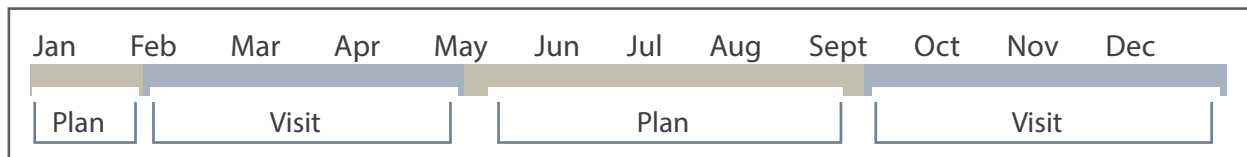




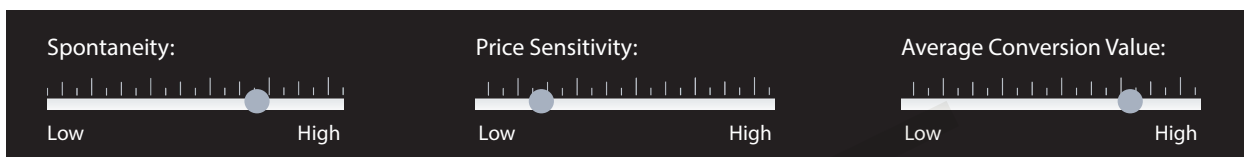
CULINARY

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

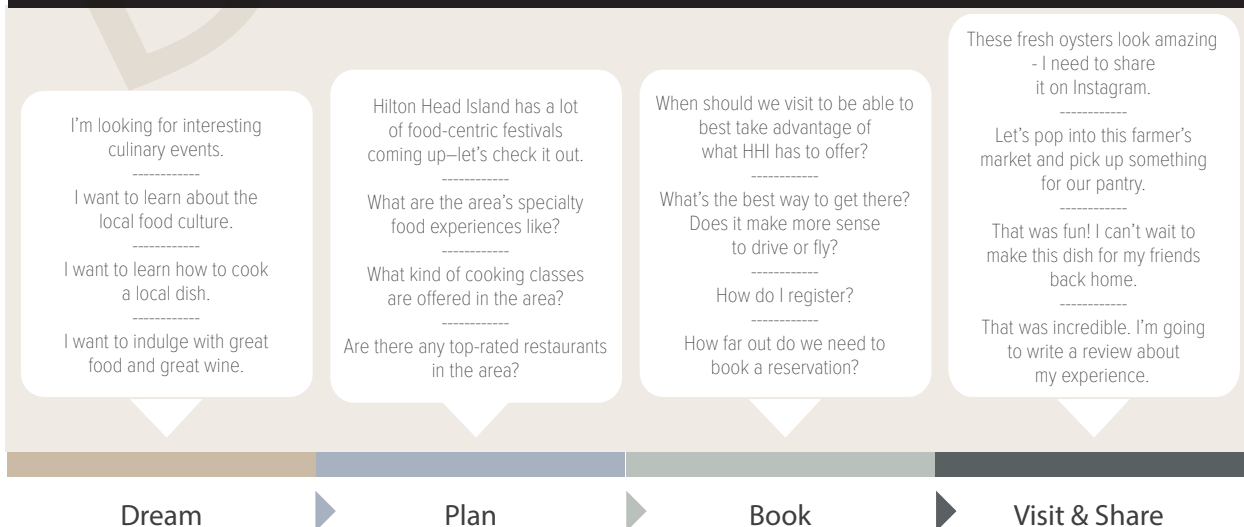
PREFERRED ACTIVITIES & ATTRACTIONS

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





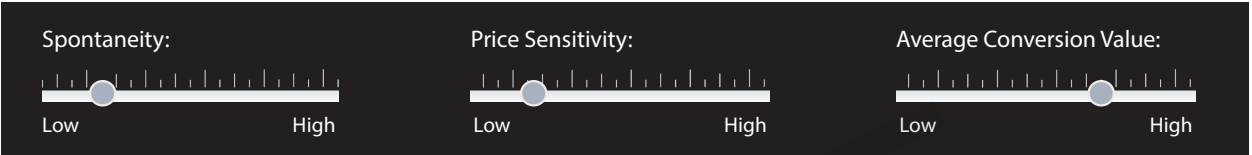
SNOWBIRDS

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

Traditional

Values Family Time

Enjoys the Finer Things

Active & Health Conscious

PREFERRED ACTIVITIES & ATTRACTIONS

Vacation Rentals & Resorts

Dining

Golfing

Tennis & Pickleball

Biking

MARKETING CHANNELS & FORMATS

Facebook

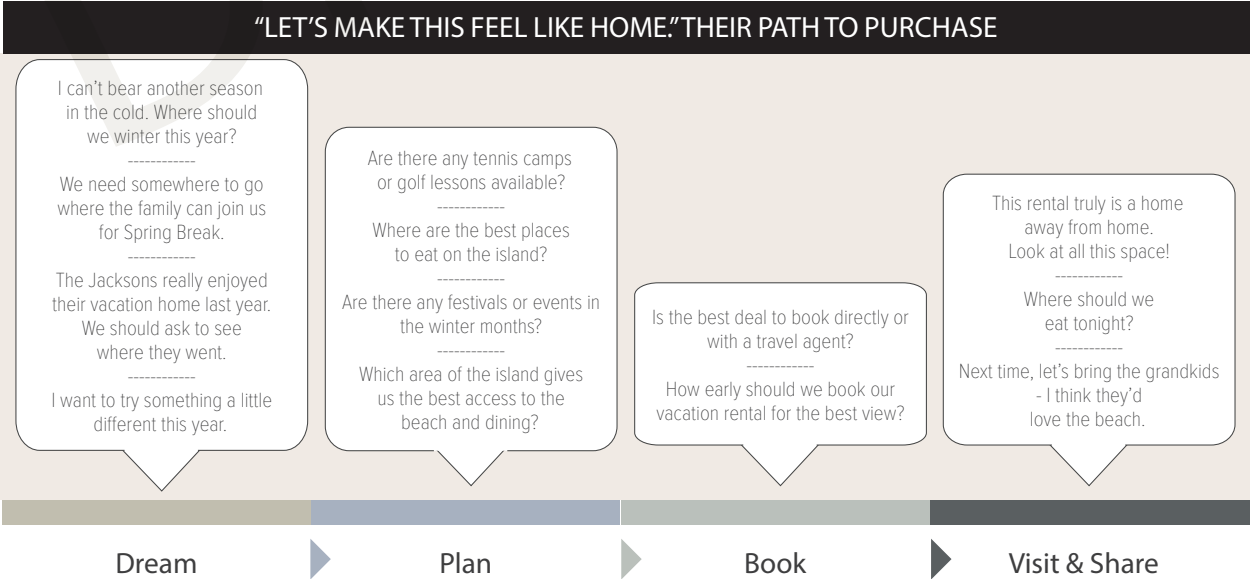
Print

TripAdvisor

Radio

TV

Online Video

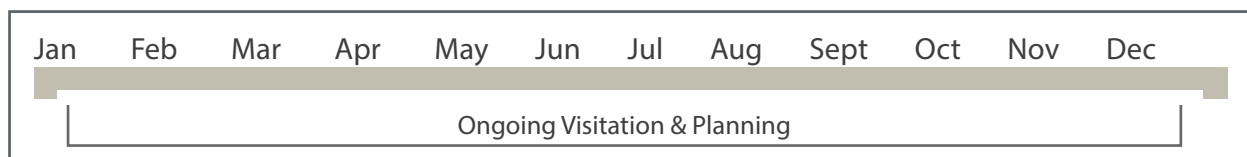




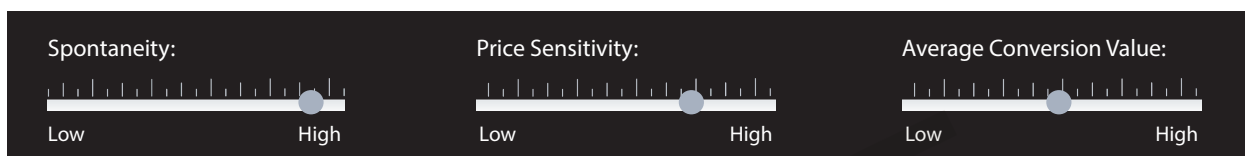
THE WEEKENDERS

TRAVEL OBJECTIVE

Find a fairweather weekend escape from work and city life.



THE WEEKENDERS TRAVEL HABITS



WHO THEY ARE

★
Upscale & Status
Oriented

🏠
Urban
Dwellers

💬
Spontaneous
& Social

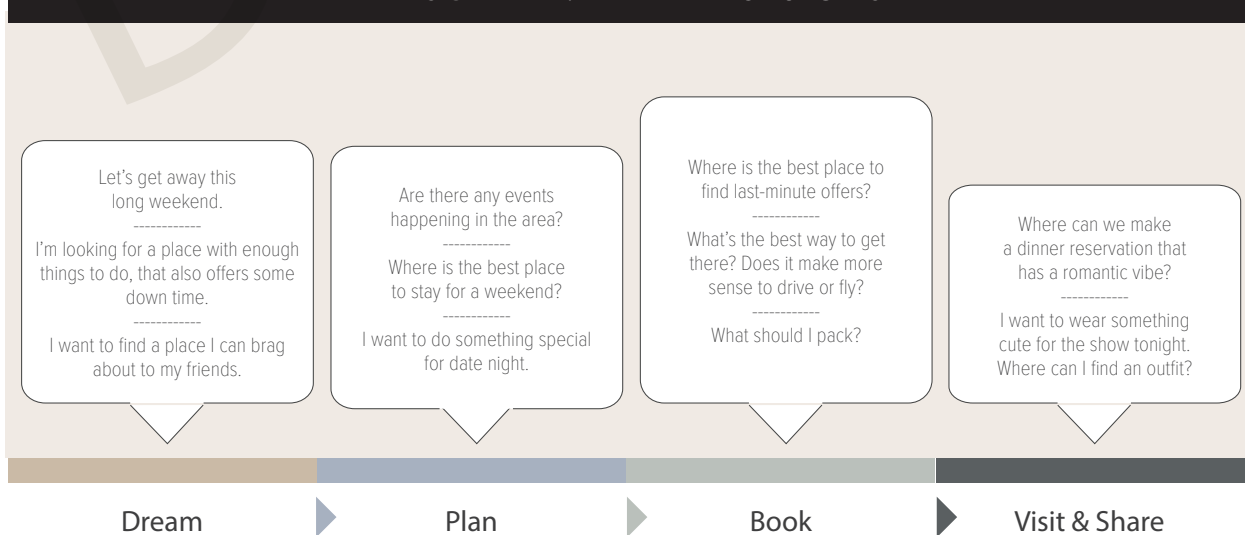
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
TV
Online Video
Forums & Blogs
Pinterest

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

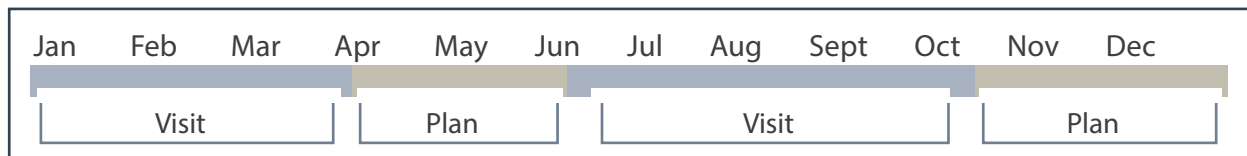




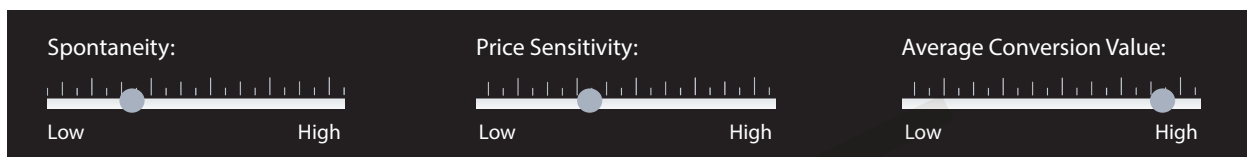
INTERNATIONAL VISITORS

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

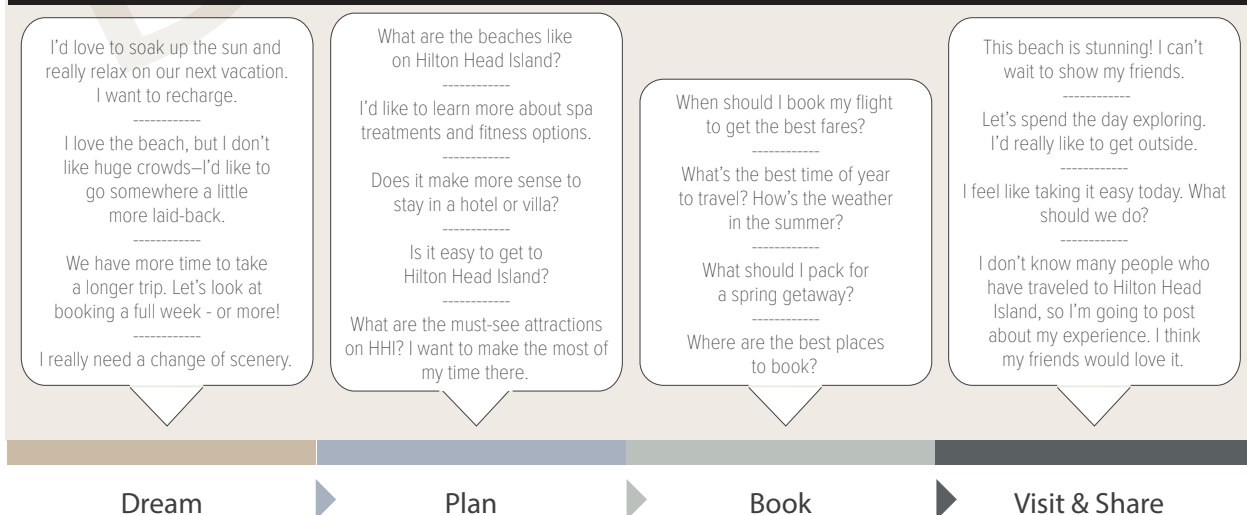
PREFERRED ACTIVITIES & ATTRACTIONS

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

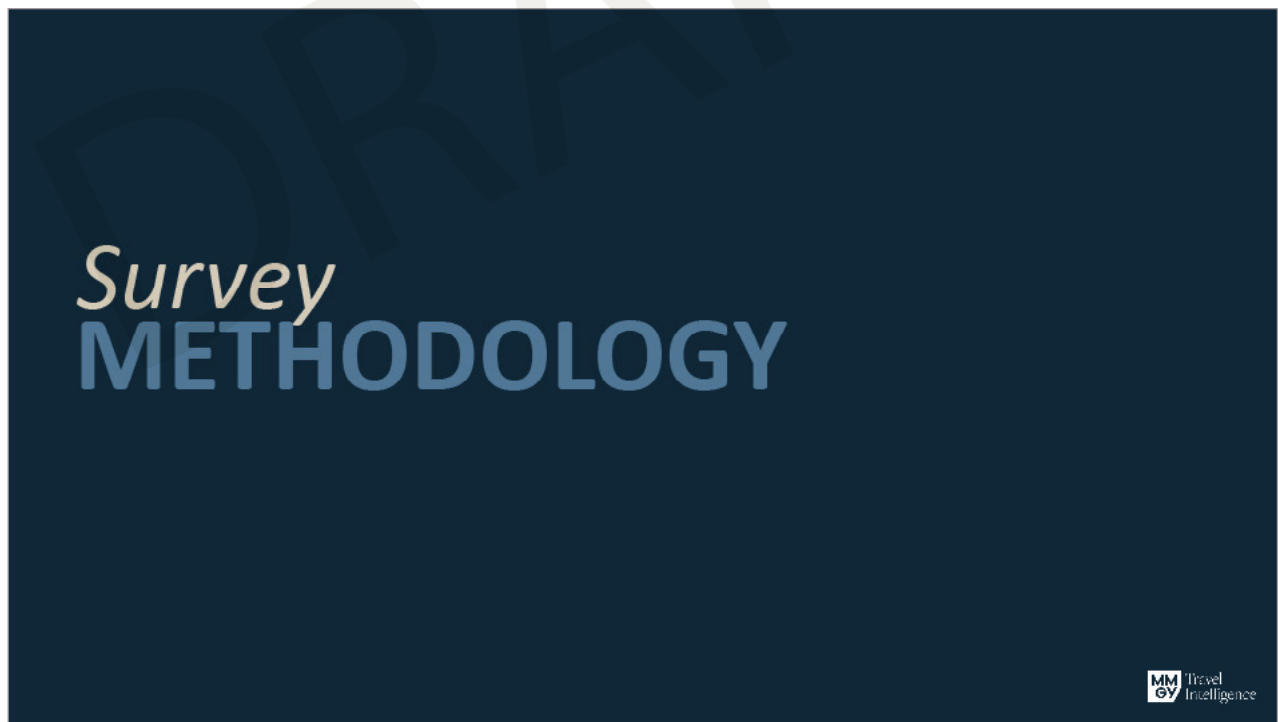
MARKETING CHANNELS & FORMATS

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

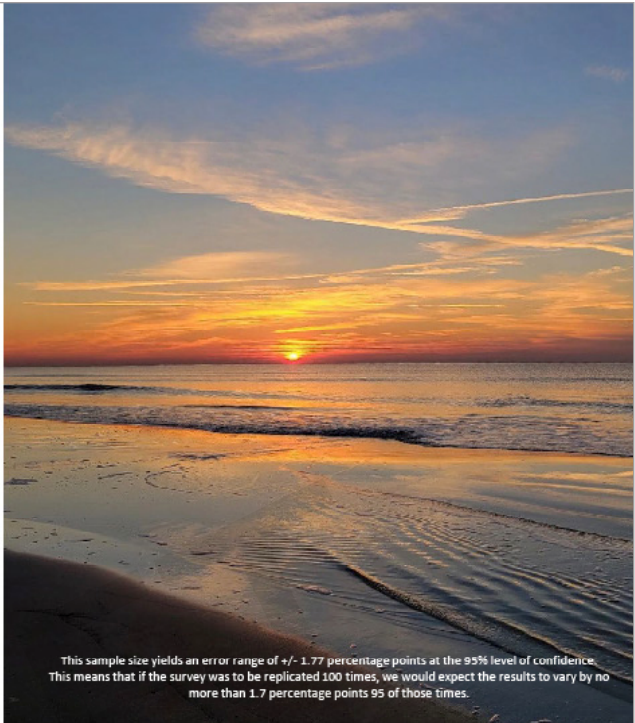


Survey Methodology

- 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.

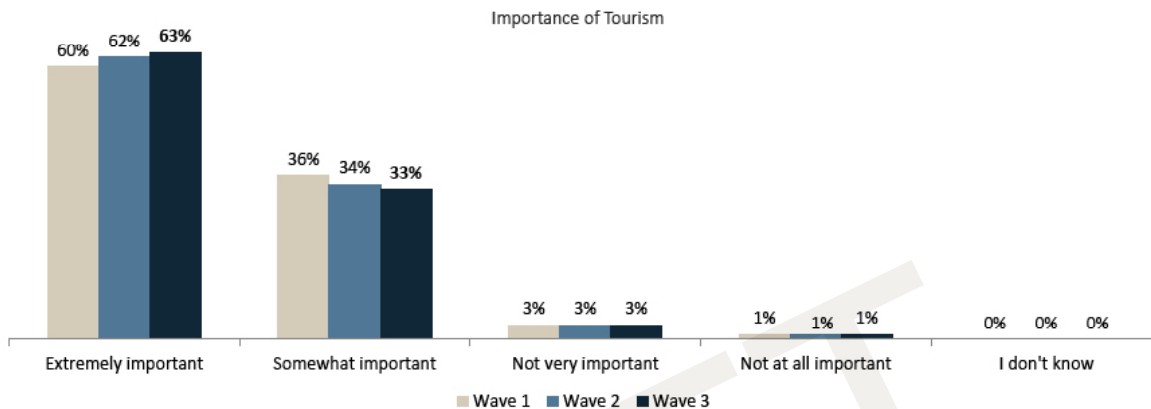
Throughout this report, data in **bold** indicates a significant difference.



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%

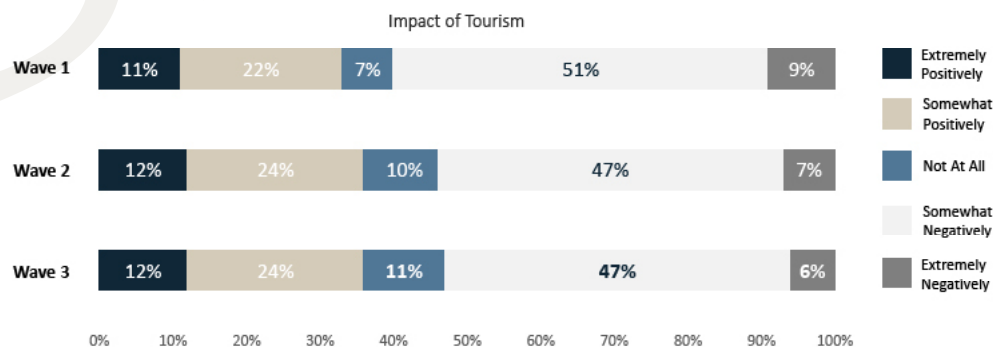
Key Insight #1

/ **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%

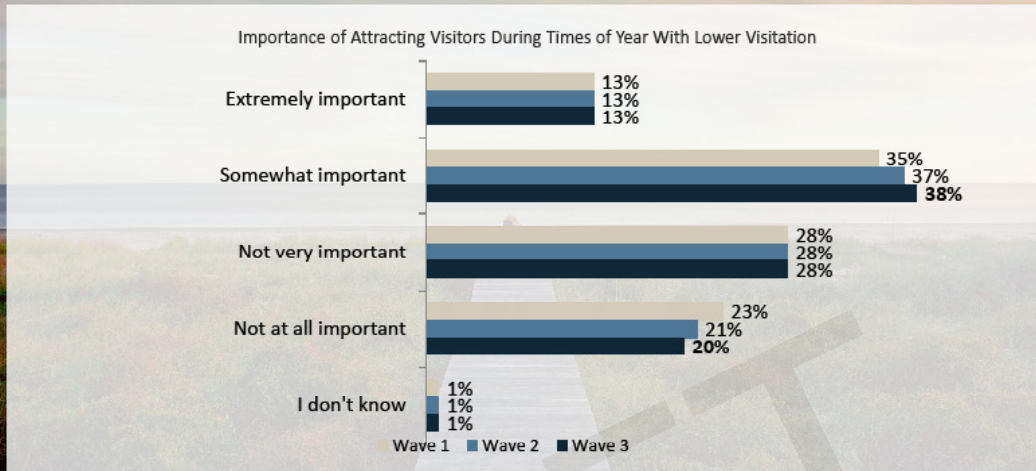
Key Insight #1

- 10 -

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



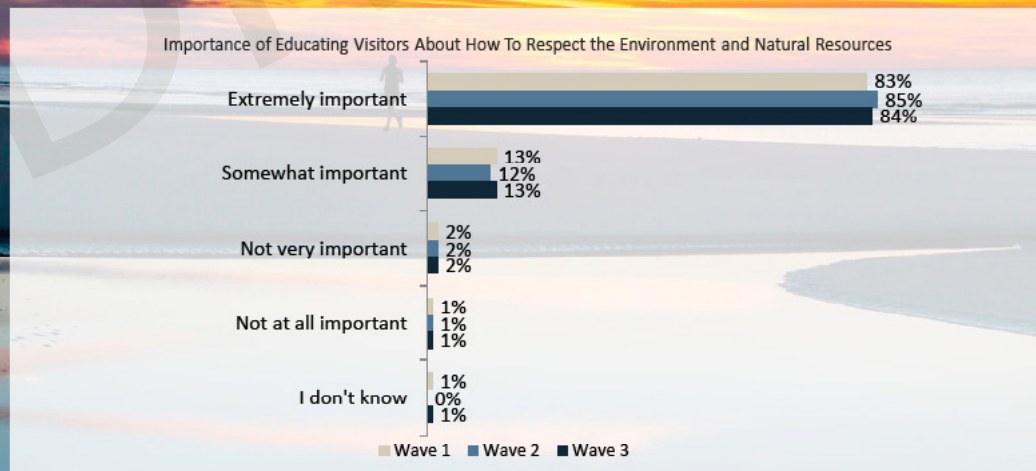
Half of residents believe that it is important to attract visitors during times of the year with lower visitation, up slightly from Wave 1.



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)?

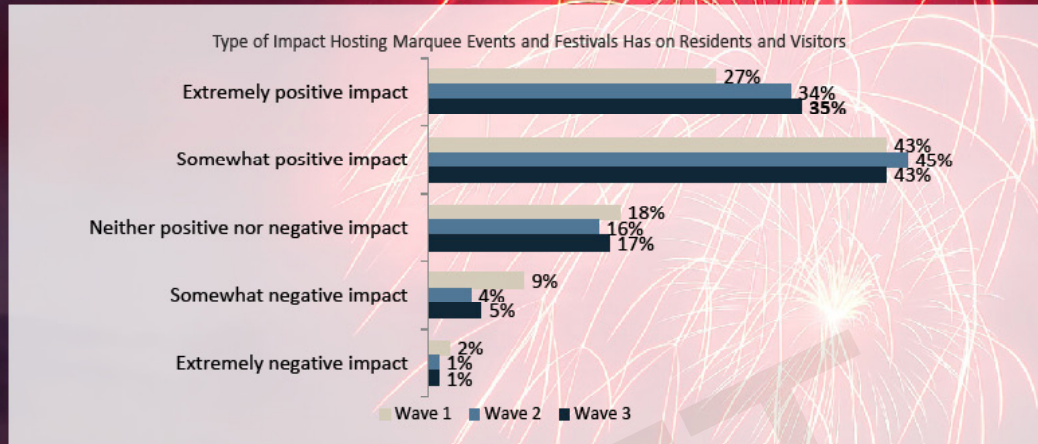
Nearly all residents believe it is important to educate visitors about how to respect the environment and natural resources when they visit, unchanged from previous waves.



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...



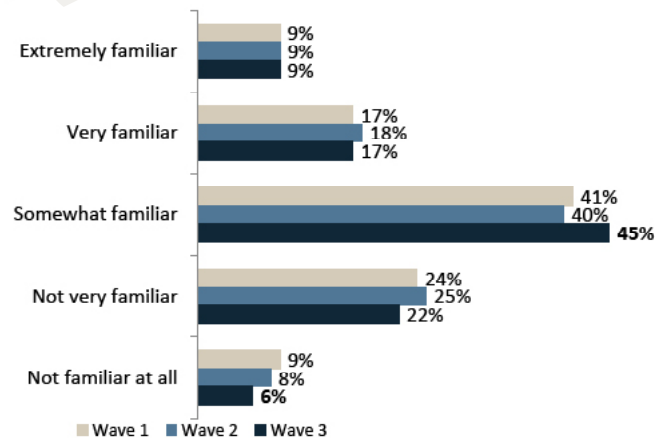
Key Insight #2

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

74%
Wave 3

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

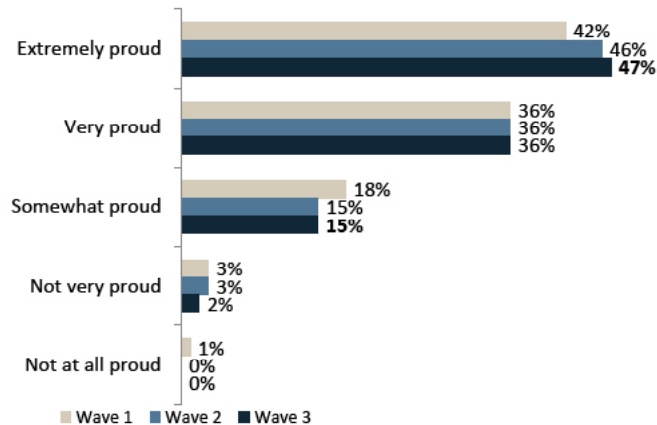
34%
Wave 3

A word cloud visualization of search results for Hilton Head Island. The largest and most central words are "Chamber Of Commerce", "Restaurants", "Facebook", "Local Life", "Activities", "Island Packet", "Hiltonheadisland.Org", "Social Media", "Hotels", and "Events". Other significant words include "Magazines", "Google", "Attractions", "Coastal Discovery Museum", "Beaches", "Palmetto Dunes", "Tripadvisor", "Shelter Cove", "Sea Pines", "Instagram", "Golf Courses", "Brochures", "Outside Hilton Head", "Sally Day", "HiltonHead.Com", "Things To Do", "Water Activities", "Bicycle Rentals", "Accommodation Is", "Maple", "Broadway", "Tom Webb Is", "HiltonHead.Com", "HiltonHead.Com", "HiltonHead.Com", "HiltonHead.Com".

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

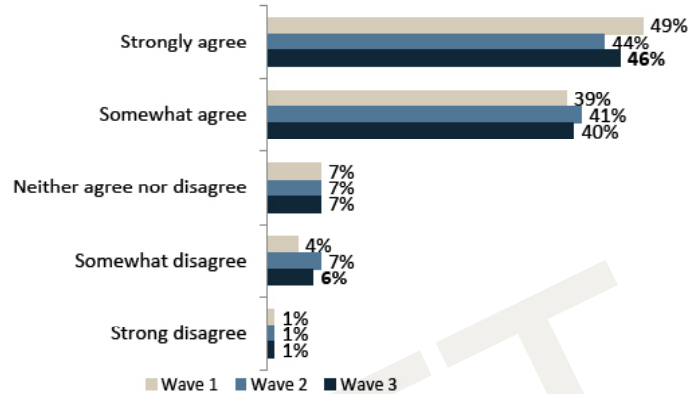
- 29 -

/ **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

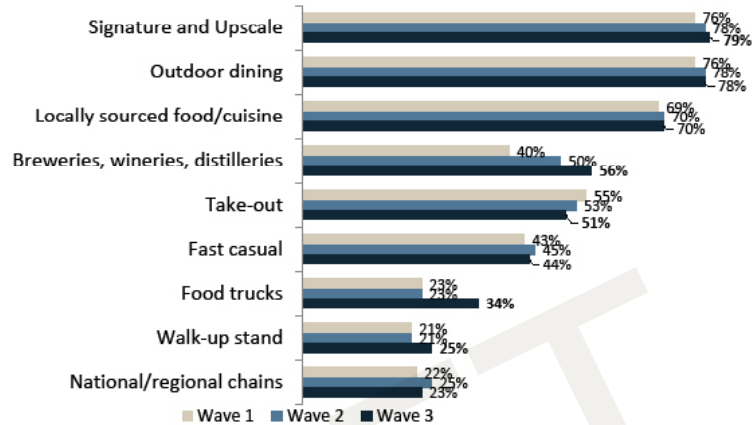
- 31 -

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



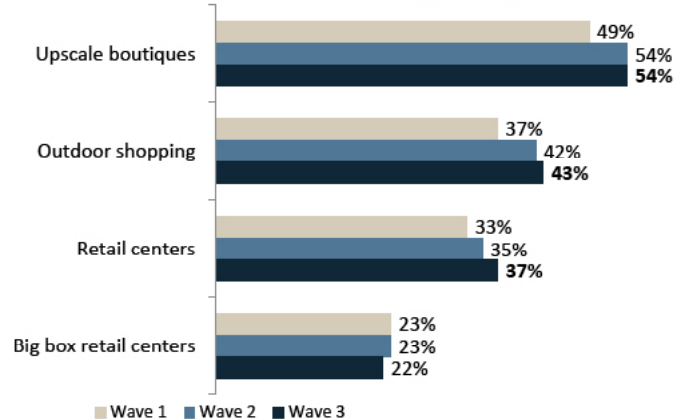
Question: Please indicate your perception of the quality of each of the following categories of dining and restaurant options on Hilton Head Island.

MMGY Travel Intelligence

Key Insight #4

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

Shopping Options in Hilton Head Island Perceived To Be High Quality



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

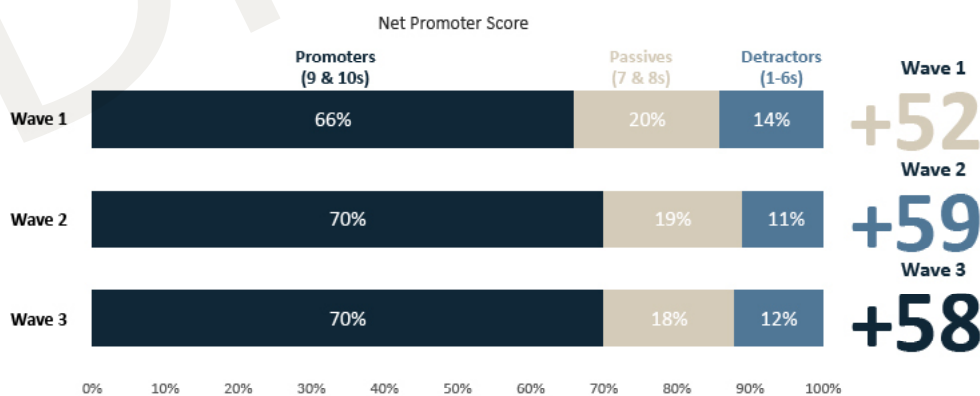
MMGY Travel Intelligence

Key Insight #4

Key INSIGHT #5

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

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



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

Key Insight #5

MM
GY 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.

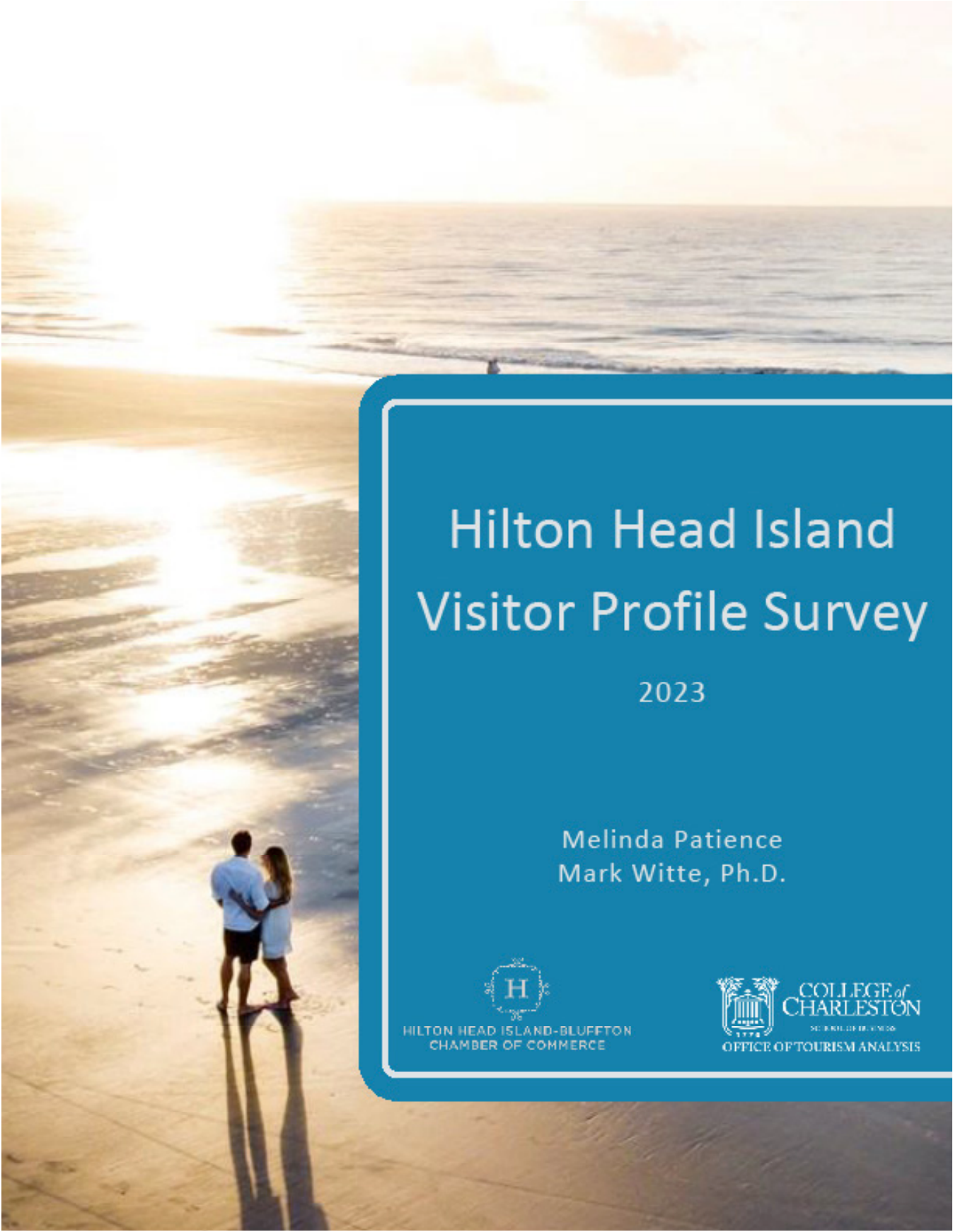
Advertise to a higher income traveler.

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

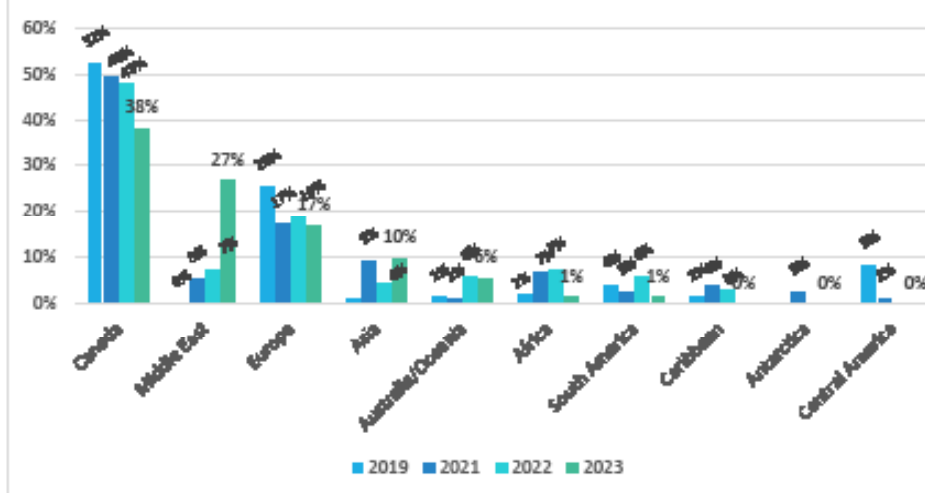
SAMPLE POINT OF ORIGIN**ZIP Code Analysis – Top 30 MSAs**

	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

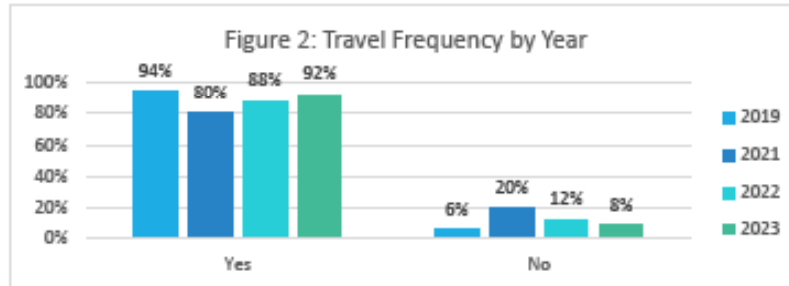
International Markets

Figure 1: International Markets by Year

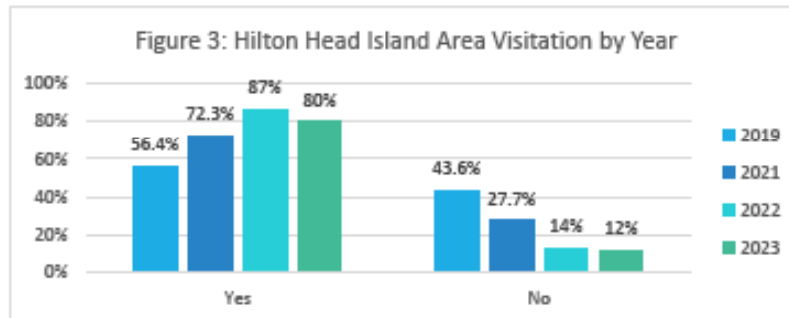


	2019	2021	2022	2023
Canada	52.1%	49.3%	47.8%	38.0%
Middle East	0.0%	5.3%	7.2%	26.8%
Europe	25.4%	17.3%	18.8%	16.9%
Asia	1.0%	9.3%	4.3%	9.9%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%
Africa	2.1%	6.7%	7.2%	1.4%
South America	4.2%	2.7%	5.8%	1.4%
Caribbean	1.4%	4.0%	2.9%	-
Antarctica	-	2.7%	-	-
Central America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

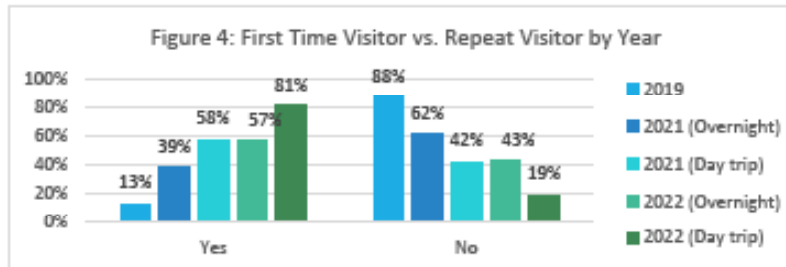
	2019	2021	2022	2023
Yes	56.4%	72.3%	86.5%	79.8%
No	43.6%	27.7%	13.5%	12.0%
N	1,713	1,675	2,547	1,570

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

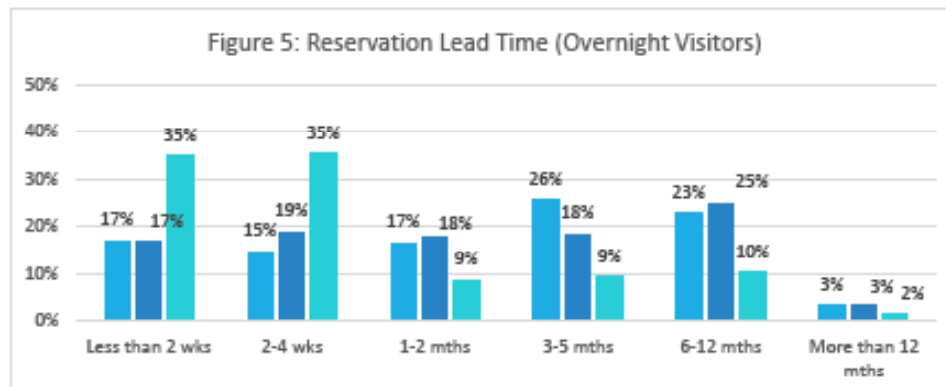
Was that your first time visiting Hilton Head Island?



	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

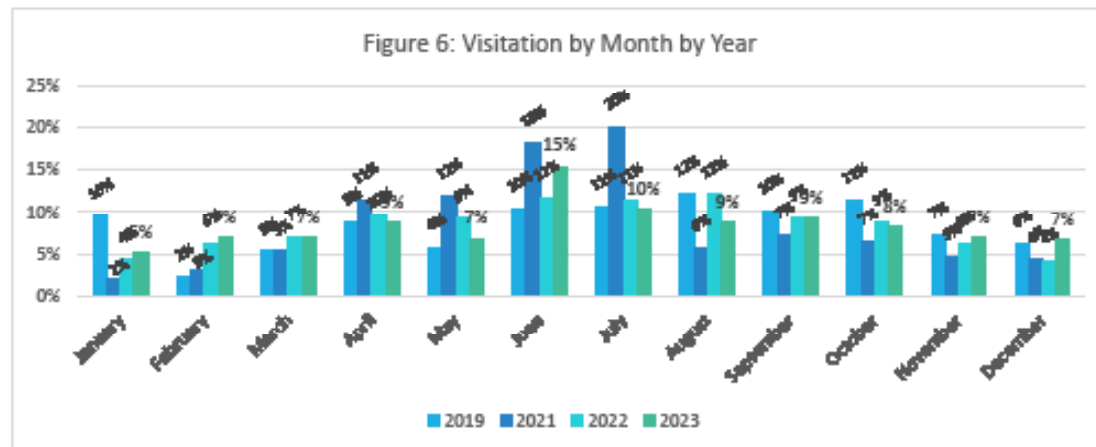
When did you make your most recent trip to Hilton Head Island?

	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

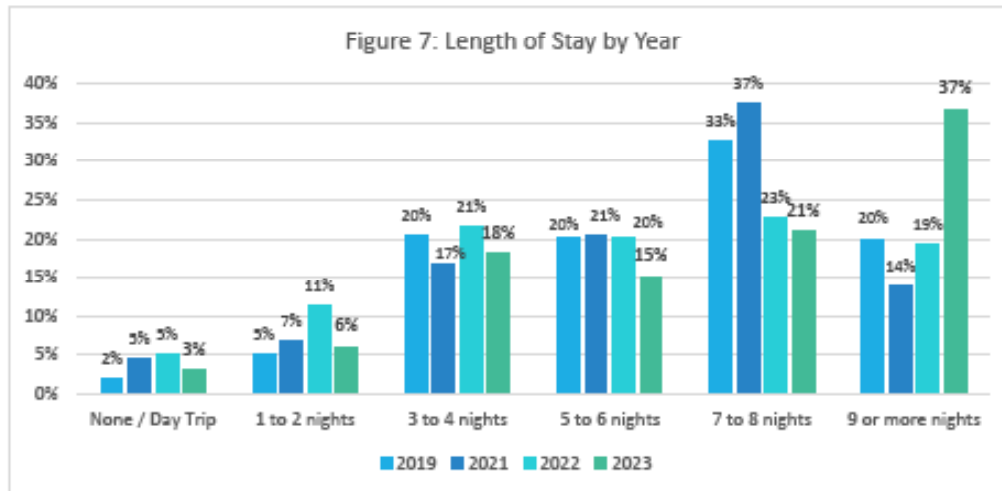
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
January	9.5%	1.9%	0.0%	4.3%	4.3%	5.1%	3.0%
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	0.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%
May	5.8%	12.0%	5.7%	9.5%	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	1044	33

TABLE 10: Visitation by Month by Year



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

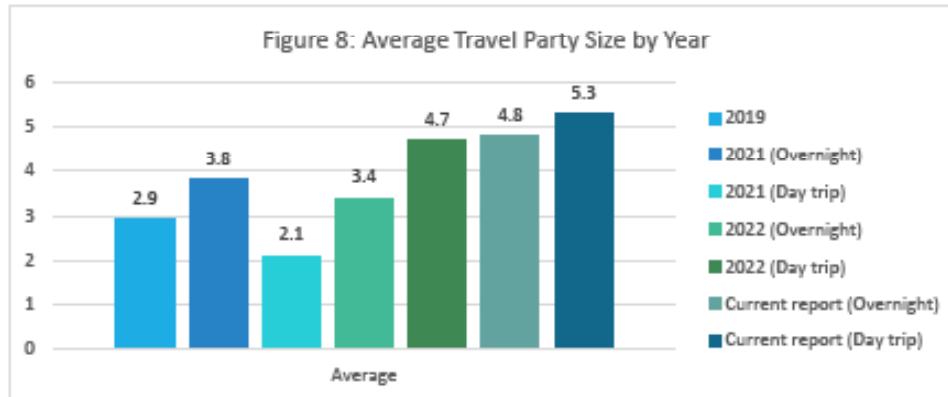
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023
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

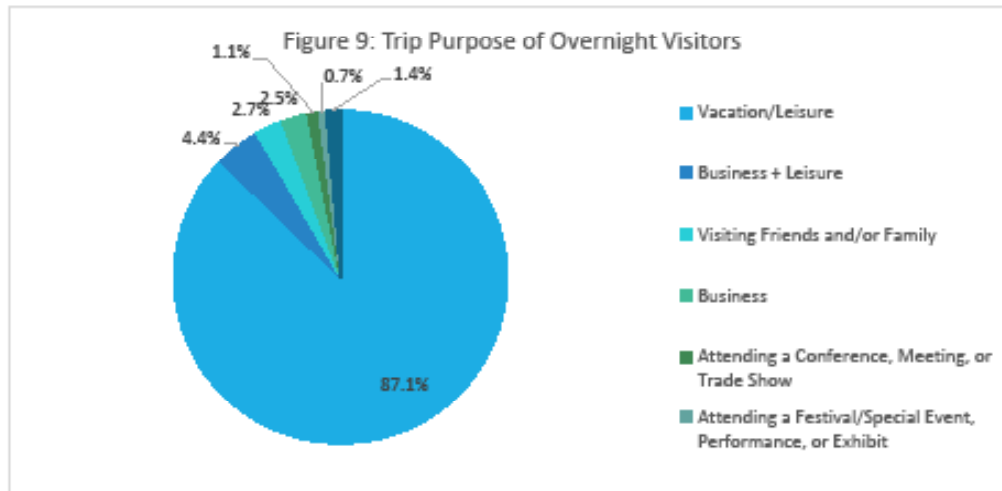
TABLE 12: Travel Party Size by Year

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

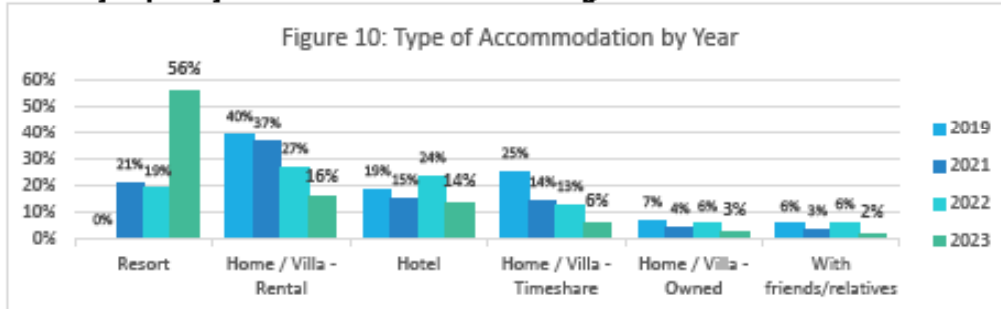
TABLE 15: Day Trip as Part of a Vacation or Day Trip from Home

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?**

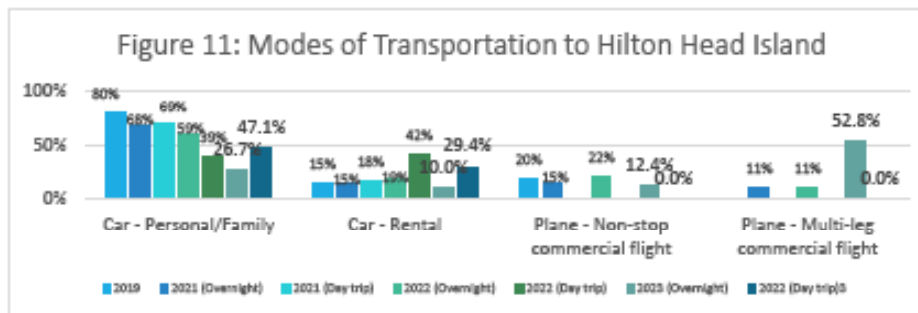
	2019	2021	2022	2023
Directly with owner	-	6.2%	6.0%	-
Vrbo	32.6%	34.2%	29.2%	32.3%
A Local vacation rental company	22.7%	22.9%	24.7%	22.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%
Airbnb	2.4%	10.0%	12.0%	10.2%
Vacasa	-	4.9%	5.5%	6.6%
HomeAway	-	2.2%	3.5%	4.2%
TurnKey	-	1.3%	-	3.0%
I don't remember	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?

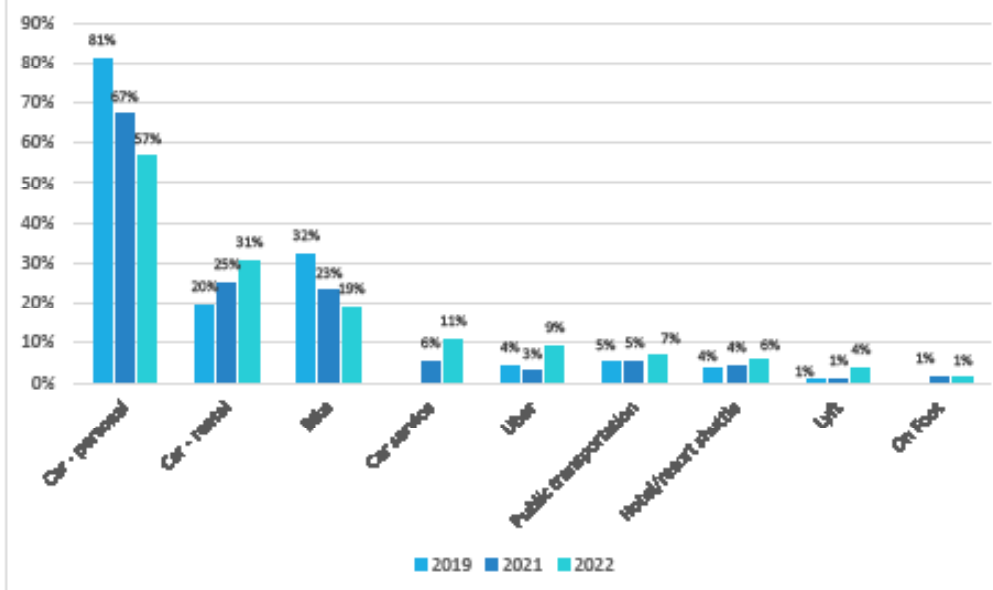
	2021	2022	2023
American Airlines	38.9%	44.8%	25.4%
Southwest	8.1%	9.0%	14.2%
Silver Airways	0.8%	1.8%	14.2%
Air Canada	5.3%	6.8%	12.8%
JetBlue	6.5%	3.6%	12.2%
Frontier	1.6%	2.3%	11.9%
Frontier	0.4%	2.3%	11.9%
Delta	16.6%	7.0%	2.6%
Allegiant	10.1%	8.1%	2.1%
Alaska	2.8%	10.4%	1.7%
Breeze	1.2%	3.2%	1.4%
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

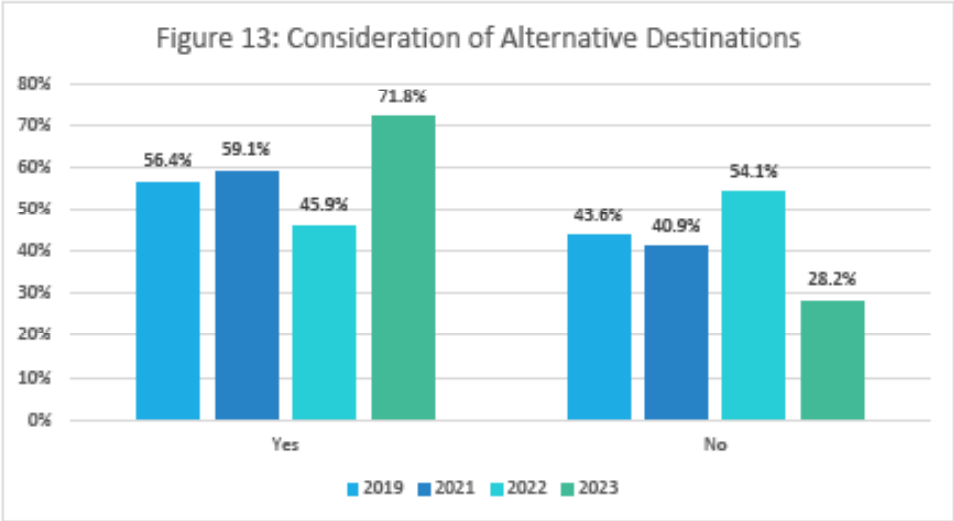
TABLE 27: Shopping Locations Visited**Did you visit any of the following cities while staying on Hilton Head Island?**

	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%
Sasa 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

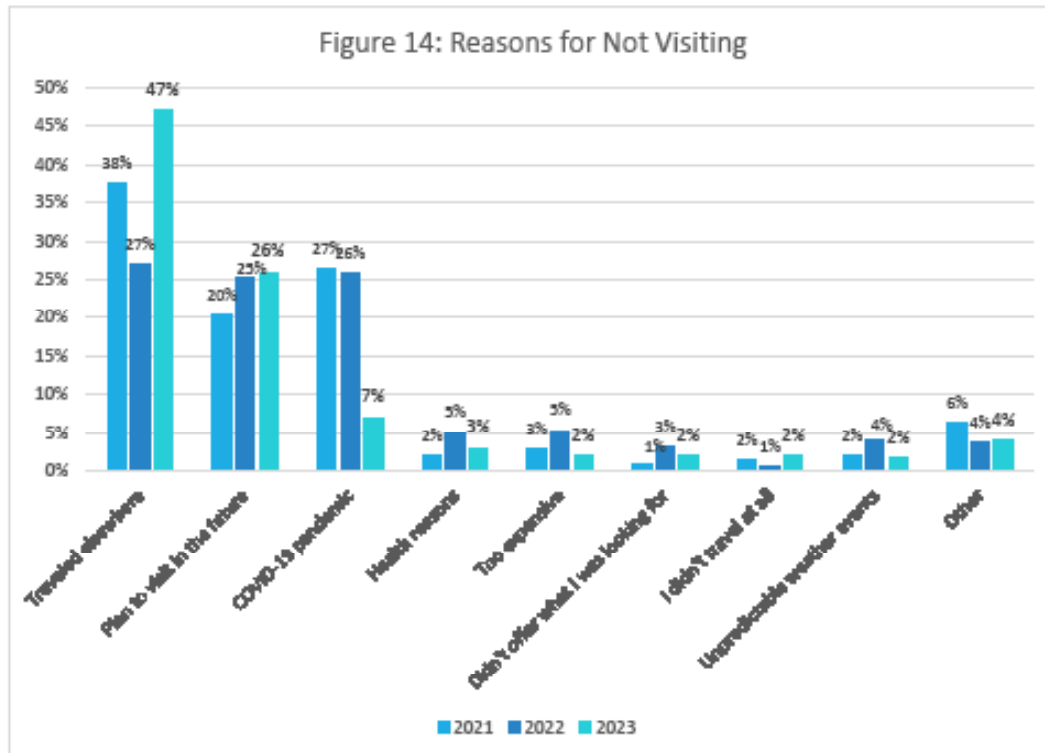
How likely are you to recommend visiting Hilton Head Island to a friend or family member?

	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

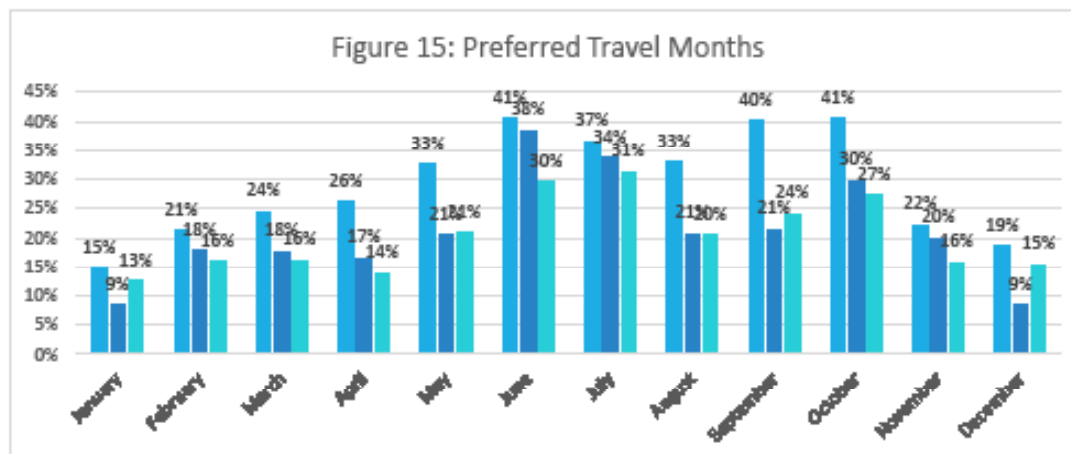
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

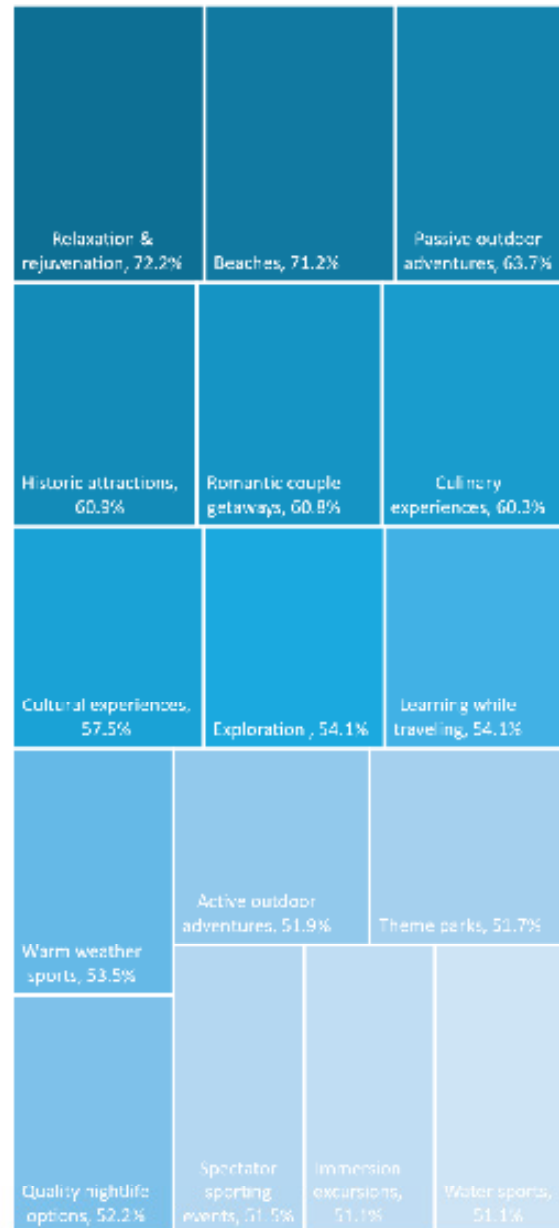
TABLE 39: Preferred Travel Months

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

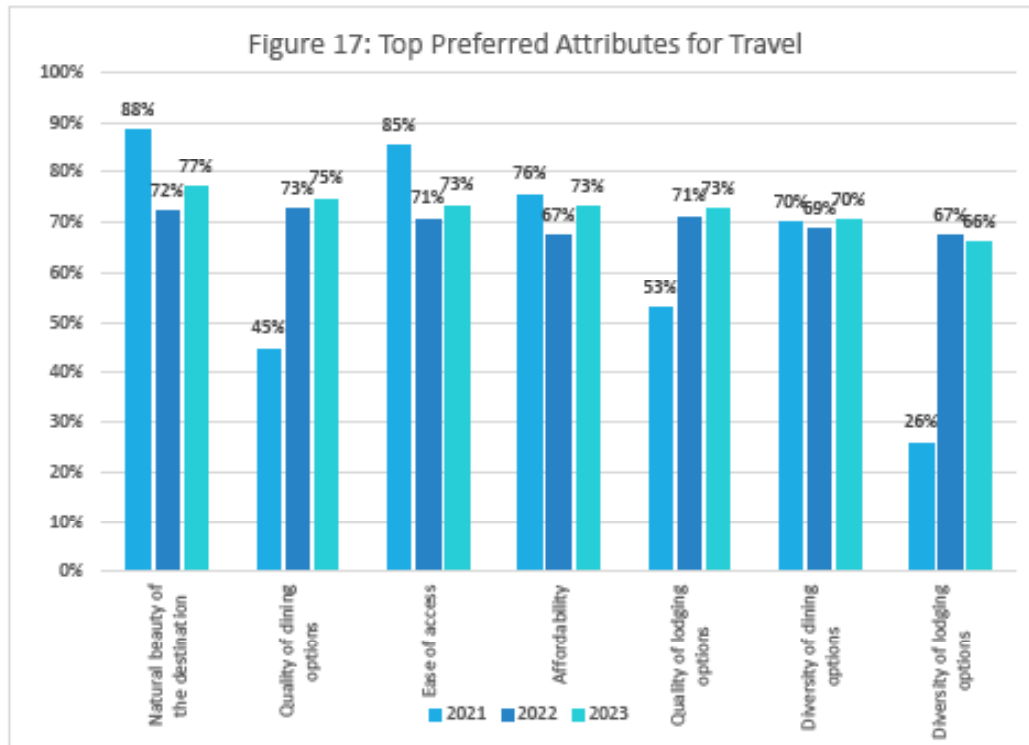
"Appealing" + "Very Appealing"	2021	2022	2023
Relaxation & rejuvenation	85.4%	66.9%	72.2%
Beaches	88.4%	65.1%	71.2%
Passive outdoor adventures	72.6%	64.4%	63.7%
Historic attractions	75.5%	64.4%	60.9%
Romantic couple getaways	70.0%	65.0%	60.8%
Culinary experiences	70.1%	63.7%	60.3%
Cultural experiences	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

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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.

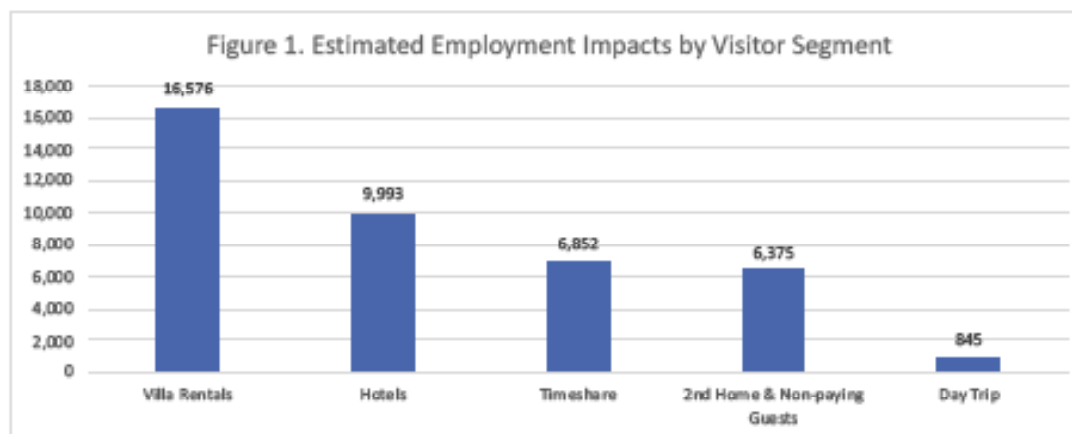
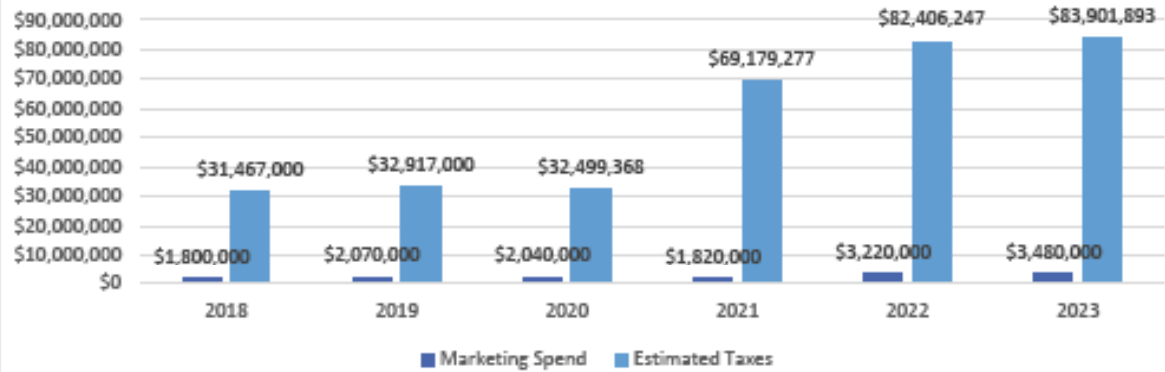


Figure 2. Marketing Spend and Estimated Local Tax Revenue Growth



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

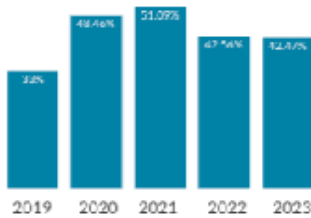
VERB INTERACTIVE
2023 Digital and Social Media Marketing Recap

HILTON HEAD ISLAND PROPER

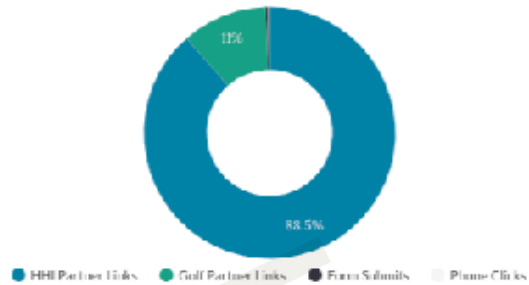
CONVERSION RATE OVERVIEW

- 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

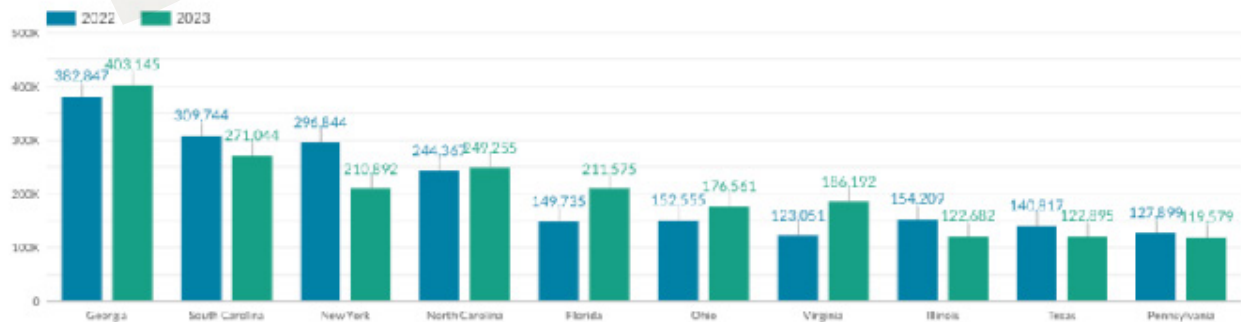


HILTON HEAD ISLAND PROPER

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.

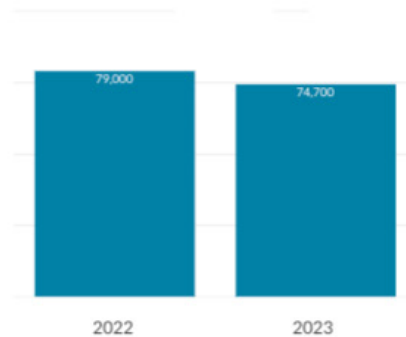
This data includes HHI, HHI Co.op, and SCRPT (when applicable).



HILTON HEAD ISLAND PROPER

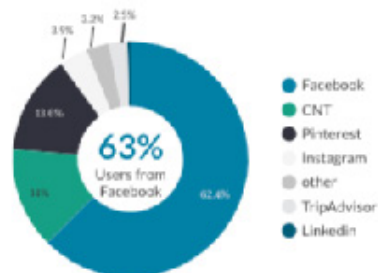
SEARCH INTEREST

- 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

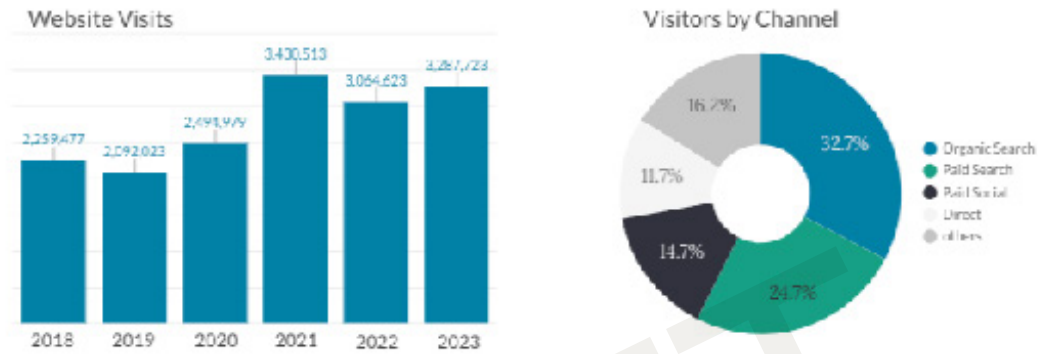
	Social Network	Sessions	% Sessions of Total	Pages / Session	Avg. Session Duration
1.	Facebook	25,795	62%	10.31	07:14
2.	CNT	5,777	14%	1.03	00:23
3.	Pinterest	5,634	14%	28.51	19:45
4.	Instagram	1,625	4%	7.61	10:24
5.	other	1,311	3%	51.00	10:42
6.	TripAdvisor	1,050	3%	15.44	04:05
7.	LinkedIn	163	0%	1.34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



The 21 Best Wellness Retreats in the U.S.

Hilton Head Health, Hilton Head, South Carolina

Hilton Head Health is a wellness resort located on Hilton Head Island, South Carolina, offering a variety of wellness programs and amenities. The resort is known for its beautiful beaches, golf courses, and world-class dining. It offers a range of wellness programs, including yoga, meditation, and fitness classes. The resort also features a variety of amenities, including a spa, a pool, and a fitness center. Hilton Head Health is a great place to relax and rejuvenate your mind and body.

woman's day

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



8

Hilton Head Health on Hilton Head Island, South
Carolina

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



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

WebMD features an article about Hilton Head Health, a luxury wellness resort on Hilton Head Island, SC, that is a great starting point for your wellness journey.

Anne Porter, director of behavioral health at Hilton Head Health, defined self-care as any activity you do on your own to promote or improve your physical, emotional, or mental health. "It's taking time to listen to what your body and mind need – and then taking action on that – is what self-care is all about," said Porter. Having healthy habits can help you manage stress and improve your mood.

Southern Living

The Best Off-Season Trips To
Plan Now



Hilton Head Island, South Carolina

Hilton Head Island is a beautiful beach town in South Carolina, known for its pristine beaches, world-class golf courses, and excellent dining. The island is a great place to relax and enjoy the outdoors. Hilton Head Island is a great place to visit in the off-season, as the crowds are smaller and the prices are lower. The island is a great place to visit for anyone who loves the outdoors and a good meal.

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

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



From long drives to scenic views, road trips are a family tradition. From the scenic views of the Blue Ridge Parkway to the historic charm of the Charleston, South Carolina, area, these are the best U.S. road trips for families. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.travelandleisure.com/family-road-trips>.

VOGUE

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

Hilton Head Island, South Carolina



From the scenic views of the Blue Ridge Parkway to the historic charm of the Charleston, South Carolina, area, these are the best U.S. road trips for families. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.vogue.com/bachelorette-party-destinations>.

Southern Living

The Best South Carolina Beaches For A Relaxing Lowcountry Getaway

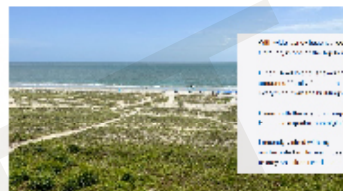


01 | Hilton Head Island

Hilton Head Island is a beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.southernliving.com/south-carolina-beaches>.

THE POINTS GUY

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



Hilton Head Island is a beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.thepointsguy.com/hilton-head-families>.

BEST LIFE

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

LOWCOUNTRY RESORTS, Hilton Head Island, South Carolina



Hilton Head Island is a beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.bestlife.com/best-beaches>.

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 beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.thetravel.com/less-crowded-destinations>.

TOWN&COUNTRY

The 50 Best Beaches on the East Coast

Hilton Head Island, South Carolina



Hilton Head Island is a beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.townandcountry.com/best-beaches>.

TRAVEL+LEISURE

11 All-inclusive Resorts Perfect for a Girls Trip

01 | Hilton Head Health

Hilton Head Health is a beautiful beach destination with a mix of scenic views, historic charm, and family-friendly destinations. The list includes a mix of scenic drives, historic routes, and family-friendly destinations. For more information, visit <https://www.travelandleisure.com/all-inclusive-resorts>.

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 choice 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 choice for families looking for a relaxing vacation with plenty of activities for everyone.

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 looking for a romantic getaway. The island offers a variety of activities, including golfing, fishing, and relaxing on the beach. Hilton Head Island is a top choice for couples looking for a relaxing vacation with plenty of activities for everyone.



OUTDOORS WIRE

Celebrate National Lighthouse Day with these 20 US Lighthouses

Hilton Head Island, South Carolina

Hilton Head Island is a beautiful destination for families looking for a relaxing vacation. The island offers a variety of activities, including golfing, fishing, and relaxing on the beach. Hilton Head Island is a top choice for families looking for a relaxing vacation with plenty of activities for everyone.

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The Best Road Trips from Florida



6. Hilton Head, South Carolina

Hilton Head Island is a beautiful destination for families looking for a relaxing vacation. The island offers a variety of activities, including golfing, fishing, and relaxing on the beach. Hilton Head Island is a top choice for families looking for a relaxing vacation with plenty of activities for everyone.



Where to Go on the Perfect South Carolina Lowcountry Vacation

Beaches, Golf, and More on Hilton Head Island



Photo: Hilton Head Island, South Carolina

Hilton Head Island is a beautiful destination for families looking for a relaxing vacation. The island offers a variety of activities, including golfing, fishing, and relaxing on the beach. Hilton Head Island is a top choice for families looking for a relaxing vacation with plenty of activities for everyone.

THE POINTS GUY

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

The South Carolina coast



Photo: Hilton Head Island, South Carolina

Hilton Head Island is a beautiful destination for families looking for a relaxing vacation. The island offers a variety of activities, including golfing, fishing, and relaxing on the beach. Hilton Head Island is a top choice for families looking for a relaxing vacation with plenty of activities for everyone.

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BAZAAR

Try These Affordable Summer Getaways In The US

Enjoy your vacation without stretching the bank

12
Hilton Head Island, South Carolina



Whether it's a relaxing beach vacation or a more active getaway, Hilton Head Island, South Carolina, offers a variety of options for travelers looking for an affordable summer getaway. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere. With its proximity to major cities like Charleston and Savannah, Hilton Head Island is a convenient and affordable destination for a summer escape.

For summer travelers looking for a relaxing getaway, Hilton Head Island offers a variety of options. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere. With its proximity to major cities like Charleston and Savannah, Hilton Head Island is a convenient and affordable destination for a summer escape.

Travelers looking for a more active getaway can enjoy the island's many hiking trails, golf courses, and water sports. The island is also home to several charming small towns, each with its own unique character and charm.

Hilton Head Island is a beautiful and affordable destination for a summer getaway. Whether you're looking for a relaxing beach vacation or a more active getaway, Hilton Head Island has something for everyone. With its beautiful beaches, historic lighthouse, and charming small-town atmosphere, Hilton Head Island is a convenient and affordable destination for a summer escape.

Fodor's Travel

14 Classic American Summer Towns That Are Also Perfect Winter Escapes



From Hilton Head Island to the charming small town of Nantucket, these 14 classic American summer towns are also perfect winter escapes. Each town offers a unique blend of history, culture, and natural beauty, making them ideal destinations for travelers looking for a peaceful and scenic getaway.

1. Hilton Head Island, South Carolina: Known for its beautiful beaches and historic lighthouse, Hilton Head Island is a popular destination for travelers looking for a relaxing summer getaway. The island is also home to several charming small towns, each with its own unique character and charm.

2. Nantucket, Massachusetts: A charming small town with a rich history, Nantucket is a popular destination for travelers looking for a peaceful and scenic getaway. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

3. Martha's Vineyard, Massachusetts: A beautiful island with a rich history, Martha's Vineyard is a popular destination for travelers looking for a peaceful and scenic getaway. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

4. Cape Cod, Massachusetts: A beautiful peninsula with a rich history, Cape Cod is a popular destination for travelers looking for a peaceful and scenic getaway. The peninsula is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

5. Block Island, Rhode Island: A small, charming island with a rich history, Block Island is a popular destination for travelers looking for a peaceful and scenic getaway. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

6. Long Beach, California: A beautiful beach town with a rich history, Long Beach is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

7. Santa Barbara, California: A beautiful coastal city with a rich history, Santa Barbara is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

8. San Diego, California: A beautiful coastal city with a rich history, San Diego is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

9. San Francisco, California: A beautiful coastal city with a rich history, San Francisco is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

10. New York City, New York: A beautiful coastal city with a rich history, New York City is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

11. Los Angeles, California: A beautiful coastal city with a rich history, Los Angeles is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

12. Chicago, Illinois: A beautiful coastal city with a rich history, Chicago is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

13. Boston, Massachusetts: A beautiful coastal city with a rich history, Boston is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

14. Philadelphia, Pennsylvania: A beautiful coastal city with a rich history, Philadelphia is a popular destination for travelers looking for a peaceful and scenic getaway. The city is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere.

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Check Out These Underrated Spring Break Destinations

12
Hilton Head Island, South Carolina



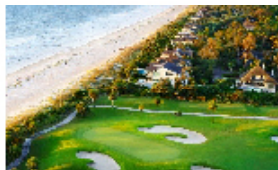
Hilton Head Island, South Carolina, is a beautiful and affordable destination for a spring break getaway. The island is known for its beautiful beaches, historic lighthouse, and charming small-town atmosphere. With its proximity to major cities like Charleston and Savannah, Hilton Head Island is a convenient and affordable destination for a spring break escape.

Whether you're looking for a relaxing beach vacation or a more active getaway, Hilton Head Island has something for everyone. The island is also home to several charming small towns, each with its own unique character and charm.

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TRAVELPULSE

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



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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, onions, garlic, and of course, season with garlic salt and black pepper. If we had the extra ingredients, it was served with a fried egg on top and sliced tomatoes. As an adult, it soon became the standard in my house as no one wanted to eat HHR after working in the restaurant all week. Because my three kids grew up on it, they now crave it, all to try and away at colleges. 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 fresh catch options, the seafood favorites, and Lowcountry-style dishes. Hudson's is also one of the best restaurants to visit if you're a seafood lover. Dining with sunset views is a must when visiting Hilton Head Island.



Stunning sunset view from the Hudson's Seafood Lounge on the Pines in 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

Hilton Head Island-Bluffton Chamber of Commerce Hilton Head Island Visitor Convention Bureau Schedule of Functional Revenues and Expenditures FY2024-2025 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 & Daufuskie	365,000						365,000	
Total Revenues	9,040,000	4,000,000	475,000	625,000	3,225,000	350,000	365,000	
Membership Revenue								1,950,000
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				

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	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co DMO	Membership
Monitoring Services (Print/Online/Broadcast Tracking)	18,300	14,795	940	2,565				
PR Contingency	50,000	40,422	2,570	7,008				
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	

Hilton Head Island-Bluffton Chamber of Commerce Hilton Head Island Visitor Convention Bureau Schedule of Functional Revenues and Expenditures FY2024-2025 Budget

	VCB TOTALS	Town of HHI DMO	VCB Private Sector	SCPRT Dest. Specific	SCPRT Co-ops	Town of Bluffton DMO	Beaufort Co DMO	Membership	
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									
Promotions	218,750					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	1,950,000	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									

TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA

RESOLUTION NO. _____

**A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF
HILTON HEAD ISLAND, SOUTH CAROLINA, APPROVING THE 2024-
2025 DESTINATION MARKETING ORGANIZATION MARKETING
PLAN AND BUDGET**

WHEREAS, pursuant to South Carolina Code, the funds received by a municipality or a county in county areas collecting more than fifty thousand dollars from the local accommodations tax authorized in S. C. Code Ann. §12-36-920 (Supp. 2023) and S. C. Code Ann. § 12-36-2630(3)(Supp. 2023) must be allocated as stated in S. C. Code Ann. §6-4-10(3)(Supp. 2023), which requires, among other things, that following certain distributions to the general fund: Thirty percent of the balance must be allocated to a special fund and used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity; and

WHEREAS, the Town receives more than more than fifty thousand dollars from the local accommodations tax authorized in S. C. Code Ann. § 12-36-2630(3)(Supp. 2023); and,

WHEREAS, among other things, S. C. Code Ann. §6-4-10(3)(Supp. 2023), requires the Town to: 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 to manage and direct the expenditure of these tourism promotion funds; and,

WHEREAS, among other things, S. C. Code Ann. §6-4-10(3)(Supp. 2023), requires the organization selected to received the funds to submit for

approval a budget of planned expenditures prior to the beginning of each fiscal year; and,

WHEREAS, as is required by S. C. Code Ann. § 6-4-25 (Supp. 2023), the Town appoints an Accommodations Tax Advisory Committee to advise and recommend to the Town Council of Hilton Head Island on the expenditure of revenue generated from the local accommodations tax; and,

WHEREAS, On April 4, 2024, the Town of Hilton Head Island Accommodations Tax Advisory Committee reviewed the 2024-2025 Destination Marketing Organization Marketing Plan and Budget and recommended approval of it; and

WHEREAS, Town Council now desires to approve the 2024-2025 Destination Marketing Organization Marketing Plan and Budget as presented by the Accommodations Tax Advisory Committee.

NOW, THEREFORE, BE IT, AND IT HEREBY IS, RESOLVED BY THE TOWN COUNCIL FOR THE TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA:

(a) the Town Council hereby approves the 2024-2025 Destination Marketing Organization Marketing Plan and Budget as presented to and recommended by the Accommodations Tax Advisory Committee.

**MOVED, APPROVED, AND ADOPTED THIS ____ DAY OF
_____, 2024.**

**TOWN OF HILTON HEAD ISLAND,
SOUTH CAROLINA**

By: _____
Alan R. Perry, Mayor

ATTEST:

Kimberly Gammon, Town Clerk

APPROVED AS TO FORM:

Curtis L. Coltrane, Town Attorney

Introduced by Council Member: _____