

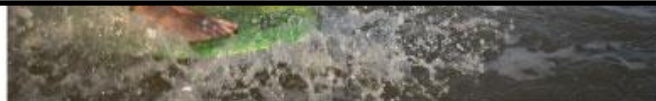


HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

Zip Into 2013 with Us!

**Hilton Head Island
Visitor & Convention Bureau**

2012-13 Destination Marketing Plan



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HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

Steve Birdwell

Chairman, Hilton Head Island Marketing Council



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{ Hilton Head Island Marketing Council

Steve Birdwell, Chairman

Kathi Bateson

Cary Corbitt

Karen Kozemchak

Ryan Matz

Tom Ridgway

Steve Riley

Carolyn Vanagel

Rob Jordan

Gerard Mahieu

David Tigges



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{ Hilton Head Island Marketing Council

Short Term Goals

Top 5

1. Identify our top assets (events/attractions/ activities), especially those that target affluent travelers, and build robust packaging with lodging around them.
2. Develop our Social Media Strategy & Allocate Resources to fully optimize.
3. *Get Louder! Campaign* to better communicate story of destination and organization's marketing programs and successes locally.
4. Improve partners planning together and creation of high impact co-op programs (like US Airways) to market destination with partners.
5. Improve and broaden SEO and keyword search.

Long Term Goals (Up to 10 Years)

Top 5

1. Funding – Grow destination marketing funding
2. Tourism Product Development – destination engagement in planning and leveraging plan announcements, openings and new products
3. Explore licensing of The Lighthouse as iconic brand image for HHI as a destination
4. Airport/ Air Service Improvements– terminal improvements, low cost carrier needed
5. Major New Fall/Winter event (Build auxiliary event(s) in fall around the Concours to increase visitation and identify new event for off-season).





HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

Bill Miles

President & CEO, Hilton Head Island-Bluffton Chamber
of Commerce



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CHAMBER OF COMMERCE

Berkeley Young
President, Young Strategies Inc.



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{



Optimism & Reinvestment!

A Positive travel forecast for 2012!

Tuesday, May 22, 2012
Hilton Head Island, SC



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{2011 — Recovery to expansion?

- “Counterintuitive”
- Stock market erratic, corp. cash stockpiles
- Federal, State & Local governments strapped
 - Spending ↓
 - Taxes ↑
 - Deficit ↑
- Unemployment languishing close to 8%
- Personal savings up ↑
- Personal spending down ↓
- Higher prices – gas, food and yes, travel



U.S. Travel Association's

U.S. Travel Outlook

Research and Trends from Dr. Suzanne Cook



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UStTravel.org

March 2011

Research Review

EXAMINING CURRENT INDUSTRY TRENDS

While key indicators point to continuing improvements in U.S. travel segments, we are once again facing uncertainty, driven by rapidly changing world events that bear primarily on fuel prices just ahead of the peak spring and summer driving and flying season. If the price of gasoline continues to increase (or even surge) this will put additional pressure on the consumer pocketbook. Despite this volatility, major analysts agree the economy is trending upward and modest growth in travel is still expected. [More](#)

The Travel Dashboard in March highlights major indexes such as employment and consumer confidence, Tourism Economics' Leading Travel Indicator, prices and lodging performance.

[More](#)

U.S. Travel Association's

U.S. Travel Outlook

Research and Trends from Dr. Suzanne Cook



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ustravel.org

January 2012

Research Review

EXAMINING CURRENT INDUSTRY TRENDS

As we begin the New Year, 2012 appears to bring positive momentum for the economy as well as the travel industry. While a sustained recovery is still not under way and uncertainty remains, most economists expect to see moderate growth throughout the year. Consumer confidence and spending showed strength over the holiday period, and employment numbers continued to improve. Airlines, however, face challenges such as weak demand and soaring fuel prices in 2012. Hotels are downshifting to slower growth, too, but business travel should continue to do well and drive recovery. [More](#)

The Travel Dashboard in January highlights major indexes such as employment and consumer confidence, Traveler Sentiment Index, prices and transportation trends. [More](#)

U.S. Travel Association's

U.S. Travel Outlook

Research and Trends from Dr. Suzanne Cook



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ustravel.org

May 2012

Research Review

EXAMINING CURRENT INDUSTRY TRENDS

With summer quickly approaching, the U.S. travel industry is anticipating moderately improved performance during the historically strong season. Despite fickle economic indicators, better industry performance data, as well as more positive consumer attitudes, suggest a more optimistic outlook for the months ahead. While gas prices remain cause for concern, surveys show that many Americans still plan to take leisure trips this summer. Business travel - the meetings sector, in particular - is under scrutiny again as a result of the high-profile GSA controversy, but the industry is working closely with policymakers in order to limit any negative effects. [More](#)

The Travel Dashboard in May highlights major indexes such as employment and consumer confidence, Traveler Sentiment Index, prices and transportation trends. [More](#)

{ Good News for 2012!

- February ADR grew by a near-record increase of 7.6% over prior year.
- In North America, hotel rates jumped more than seven percent for both business (+7.1%) and leisure (+7.3%) travelers in February, marking the biggest year-over-year increase on record, [according to Pegasus](#).
- Despite an expected slowdown in April, forward-looking booking data shows demand increasing at a steady pace into the spring and summer, according to the Pegasus View.
- STR's most [recent forecast](#) predicts ADR will grow 3.8 percent in 2012 and 4.4 percent in 2013.



{An Evolving Traveler

- Mercenary Traveler
- Last minute planning
- Value seeking
- More shorter trips
- Shift - Boomers to GenX
- Exploring new planning technology
- Changing travel party demographics
- Fewer but more engaging activities



{An Evolving Traveler

FUNDAMENTAL SOCIAL CHANGE:

Leisure travel is no longer just a luxury

For most

It is a form of therapy

We just have to get away!



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{An Evolving Traveler

The NEED to GET AWAY:

- **Get away from work, friends, family**
- **Get away from debt, politics, religion**

TRUMPS:

- **Price of gas**
- **Lack of job**
- **Debt, politics, family, etc.**



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{Top Travel Trends

- **Last minute planning > news cycle**
- **Technology to book**
 - Website = experience (videos)
- **Social media = relationship**
- **Jaded travelers – been there done that**
- **Impatient travelers want you to take charge of their TOTAL experience**



{Traveler Expectations

- We are hearing from travelers that it is not always about the destination, but also about what their passion points are, what motivates them, what they love to do in their life,"
 - Ellen Bettridge, vice president American Express Retail Travel Network.



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{Traveler Expectations

- Travelers are increasingly building their trips around festivals (such as wine and/or food).
- Although the culinary experience is a big draw, there is also increasing interest in hiking tours and outdoor, active vacations and expedition-type holidays.
- American Express data show that U.S. consumers are planning to spend 11 percent more on vacations in 2012 than last year.



{Branding & Rebranding

- **Your travel product MUST stand out**
- **Appeal as a UNIQUE EXPERIENCE**
- **Your message must:**
 - Stand out
 - Be memorable
 - Connect emotionally with the traveler
 - Motivate interest
 - Be consistent
 - Be funded to be visible



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{ **Take Away**

**You can't run your offense when you
are always on defense**

Slow down the game

Control the ball

Run your offense

RESEARCH BASED PLAN!

Customer Driven!!



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{

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Young Strategies, Inc**

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www.twitter.com/berkeleyyoung

www.youngstrategies.com



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{ Young Strategies Team

- Destination research and strategic planning
- Research for 100+ destinations in 26 states
- Communities, regions and states
- Travel industry focused
- National research data and trends analysis
- Writing and speaking
- Board workshops & planning sessions
- Listening to travelers



{ Sources

U.S. Travel Association

Wells Fargo Economics Group

Ypartnership

Smith Travel Research

PKF Hospitality Research

Tourism Economics

The Conference Board

Bureau of Labor Statistics

PhocusWright

U.S. Census Bureau

Cruise Line Industry Association (CLIA)

Air Transport Association (ATA)

Center for Exhibition Research (CEIR)

National Restaurant Association (NRA)

American Hotel & Lodging Association (AH&LA)



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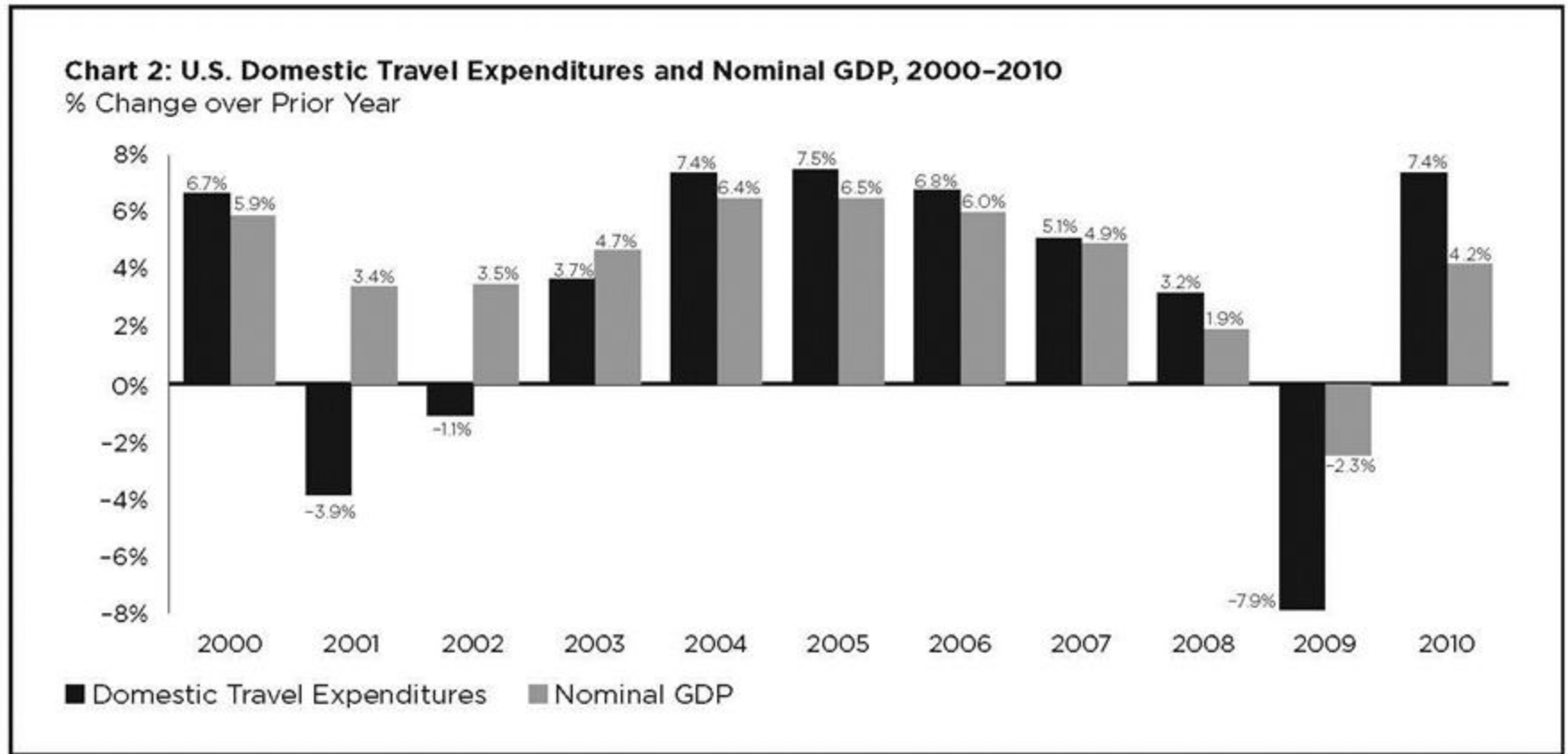
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CHAMBER OF COMMERCE

Susan Thomas
Vice President, Visitor & Convention Bureau



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{ U.S. Travel Economy 2000-2010

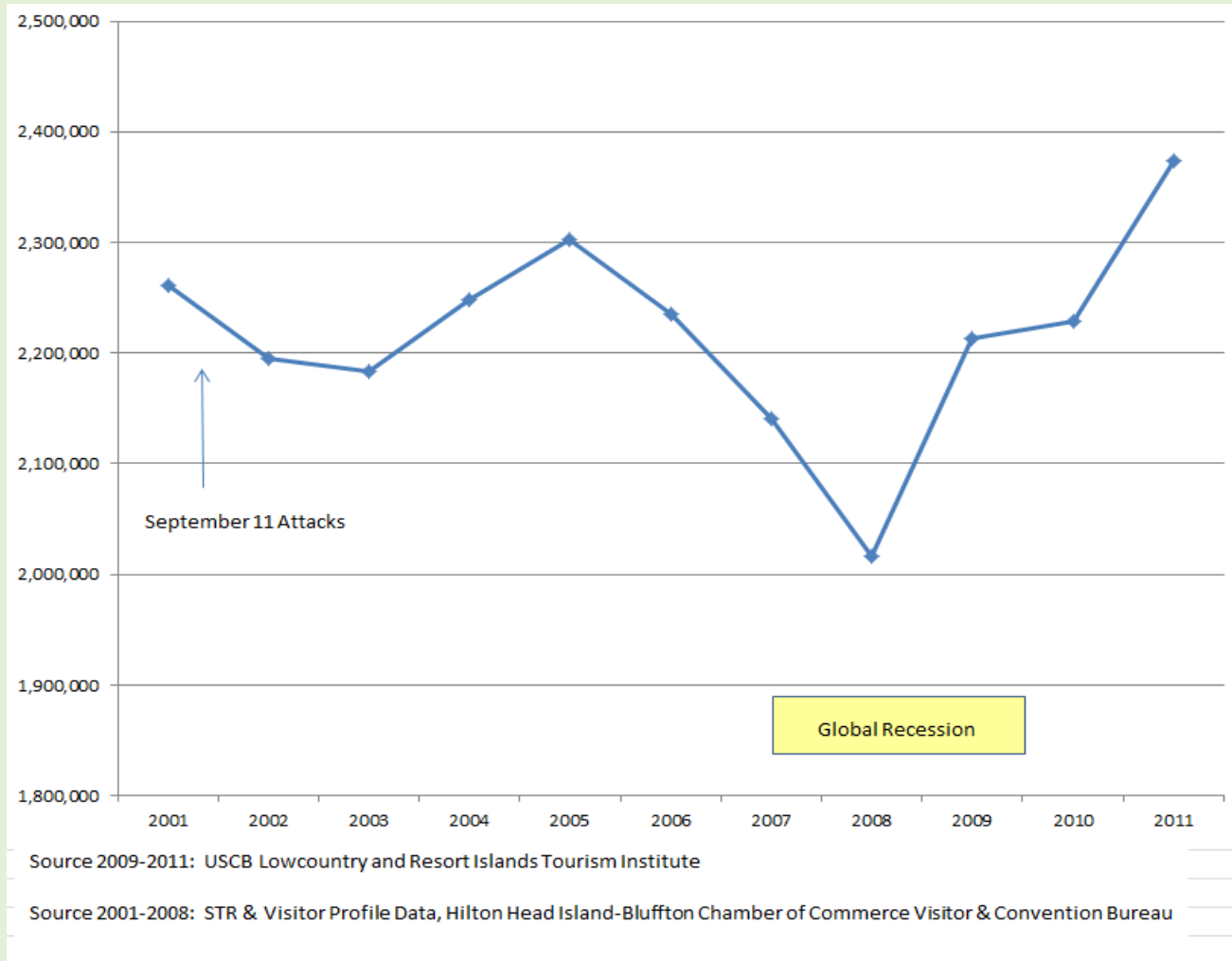


Sources: U.S. Travel Association, U.S. Department of Commerce



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{ Total Visitors to Hilton Head Island per Year



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{ Lodging Metrics: Jan-March 2012 vs Jan-March 2011

- Two-Source Occupancy: Up + 14.2%
- Two-Source ADR: Up + 13%
- Two-Source RevPAR: Up + 29%

Source: STR & V-trip Two-Source Report



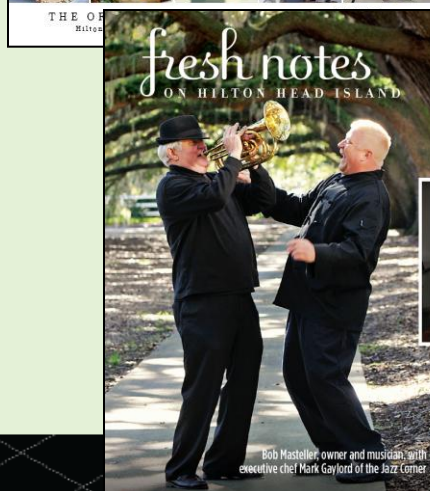
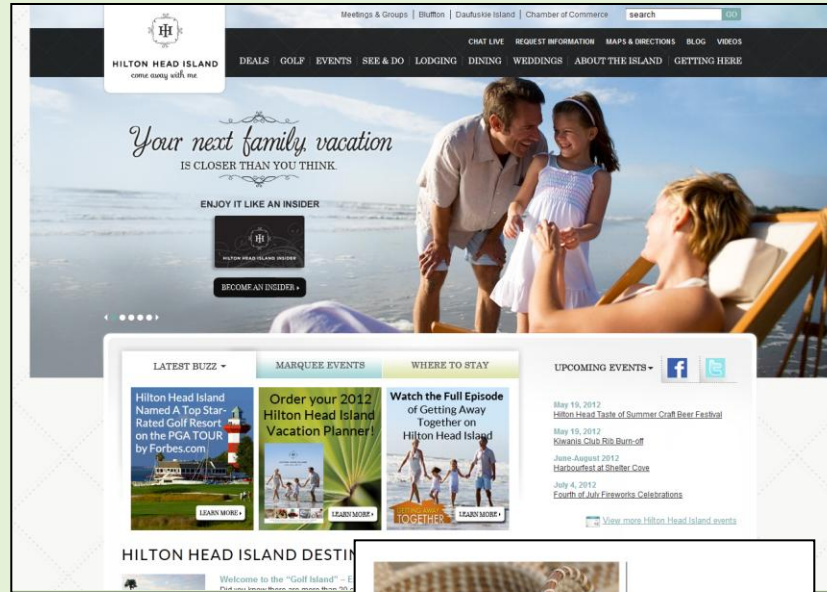
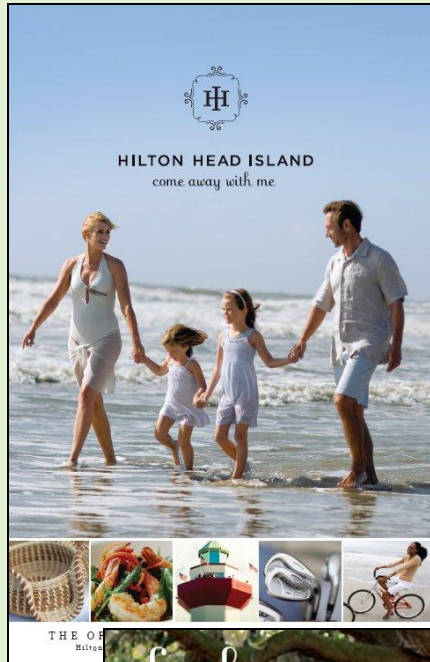
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{ Future Trends: April-September 2012

- “On the Books” Vacation Rentals Occupancy:
Up + 4.1%
- “On the Books” Vacation Rental ADR:
Up + 0.8%
- “On the Books” Vacation Rental RevPAR:
Up + 4.9%



{ Plan Highlights



The Jazz Corner on Hilton Head Island is a cultural crossroads of two great southern traditions – jazz and food – and was voted one of the great jazz rooms in the world by *DownBeat Magazine* in 2011. Sea Grass Grille was voted “Best Seafood Restaurant” by locals, an impressive feat on an island with more than 250 restaurants. For more winning Southern cuisine and culture, visit to hiltonheadculinary.com.



Don't miss Hilton Head Island Wine & Food Festival, March 5-10, 2012!
 "Dining here is like having an intimate dinner in someone's beach house."
 – Sea Grass Grille executive chef, Chad Newman



Hilton Head Island Visitor & Convention Bureau
www.hiltonheadculinary.com | 800.523.3373

HILTON HEAD ISLAND
America's Heritage
 OF FREEDOM

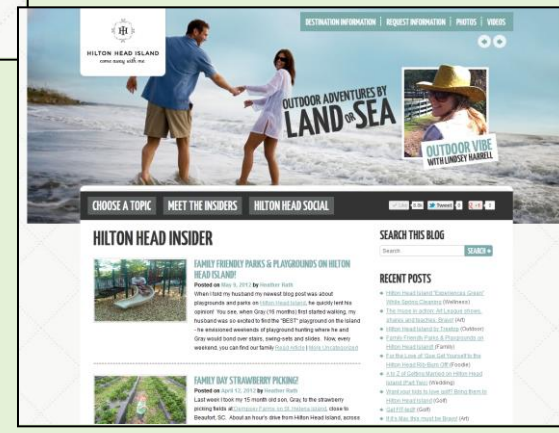
MITCHELLEVILLE – THE NATION'S FIRST FREEDMAN'S VILLAGE

As America recognizes the sesquicentennial of the end of the Civil War, Hilton Head Island, South Carolina is commemorating the anniversary by bringing to life the story of Mitchelville. Listed on the National Registry of Historic Places, Mitchelville's significance in American history is profound.

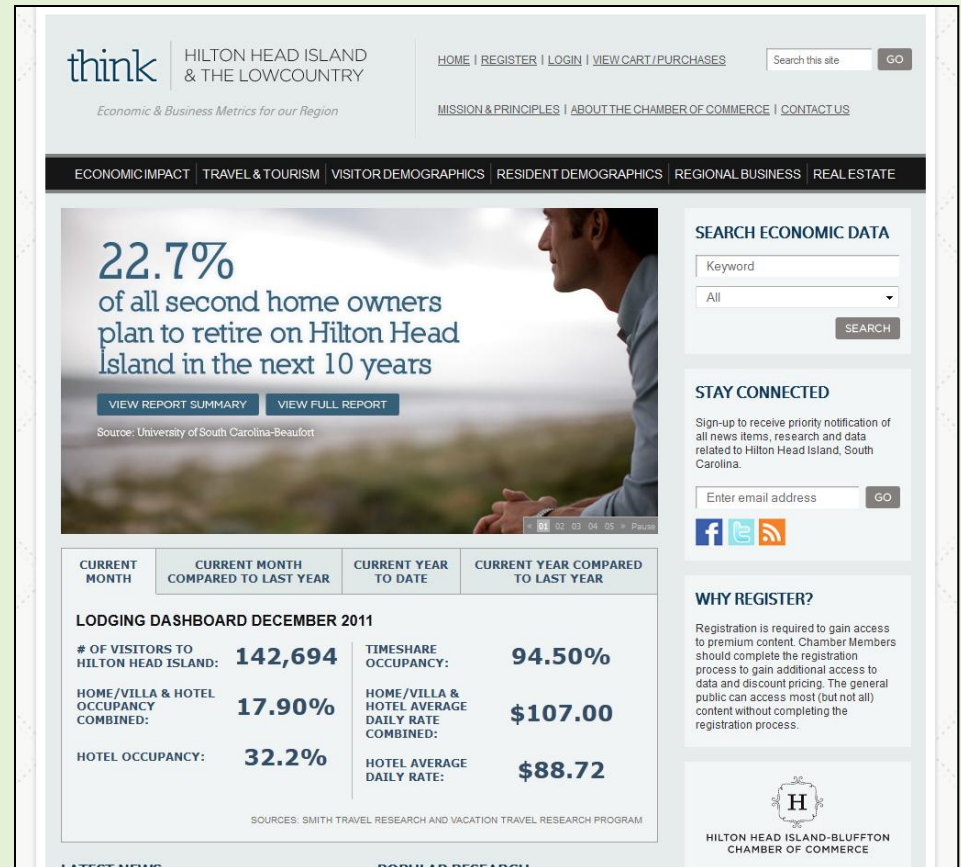
Mitchelville was the nation's first self-governed freedman's village. It was created in 1862, a year after Union ships drove Confederate troops from Hilton Head Island and a year before the Emancipation Proclamation. Today the Mitchelville Preservation Project is establishing an outdoor historic exhibit on the same land where over 1,500 freedmen and their families worked, learned and lived during the Civil War.

Visitors to Hilton Head Island can take a Guided Heritage Trail Tour through its Gullah village, which date back to the end of the Civil War, including historic Mitchelville, Special Gullah tours, programs and events are also offered at The Gullah House on Givens Road and the Coastal Discovery Museum at Honey Bluffs.

Visit HiltonHeadIsland.org/Gullah to explore more about historic Mitchelville and order your Hilton Head Island Vacation Planner from the Hilton Head Island Visitor & Convention Bureau, or call 800-523-3373.



{ Research-Driven Destination Marketing



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{ Focus on the Affluent Traveler

HILTON HEAD ISLAND
GOLF

FIND GOLF COURSES BY MAP | GOLF BLOG | DESTINATION INFORMATION

REQUEST A QUOTE

COURSES

GOLF PACKAGE OFFERS

LODGING

GOLF SCHOOLS


EVENTS

PHOTOS & VIDEOS

HILTON HEAD EXPERIENCE

LEGENDARY GOLF
EXPERIENCES


HAMPTON HALL GOLF
COURSE



Precision and artistry take shape on this Pete Dye Signature Course at Hampton Hall...

[Learn more](#) [Visit Web Site](#)


DOLPHIN HEAD GOLF
CLUB



Tee off course designer Gary Player's first golf course on Hilton Head Island...

[Learn more](#) [Visit Web Site](#)


GALLEON/BRIGANTINE
COURSE (SHIPYARD)



Nearly all holes are lined with towering oaks and feature a few interesting doglegs...

[Learn more](#) [Visit Web Site](#)

BARONY COURSE
(PORT ROYAL)



Over 40 years old and one of Hilton Head Island's champions of antiquity...

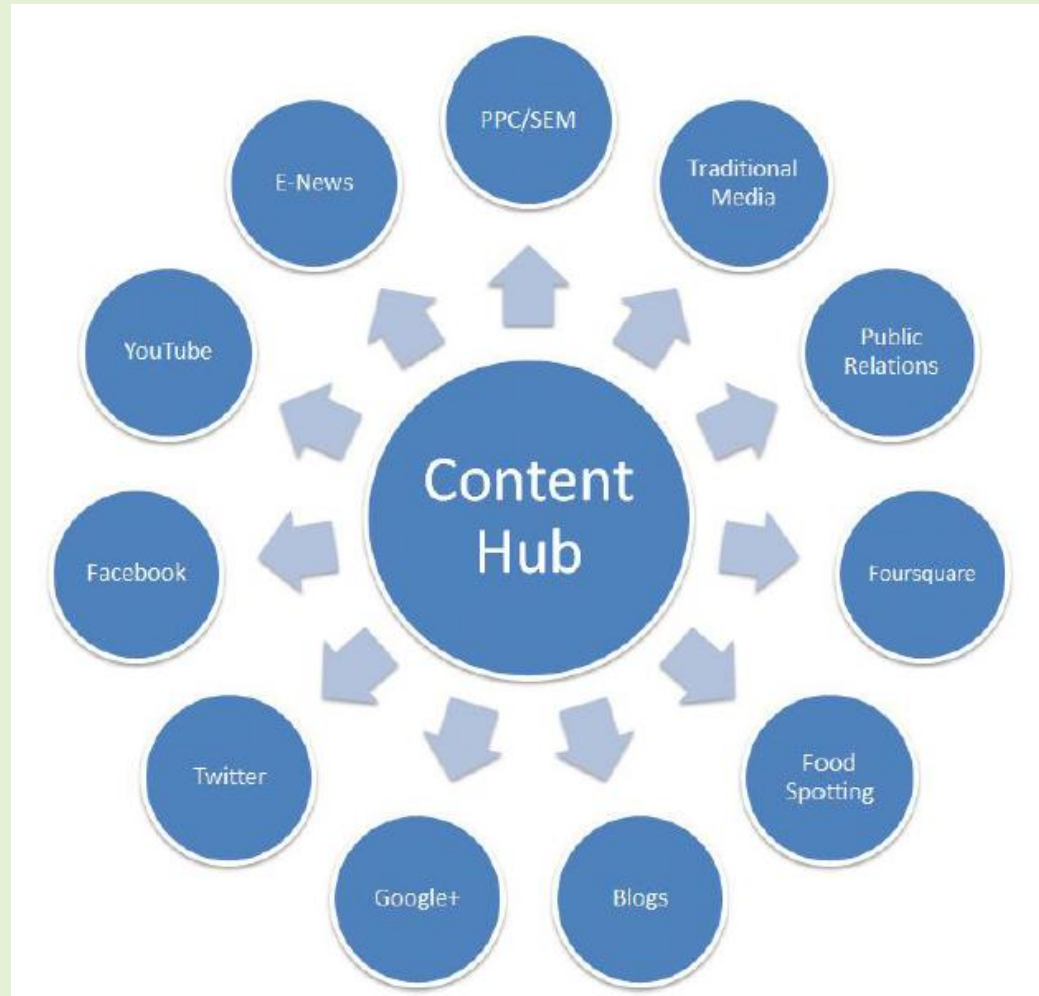
[Learn more](#) [Visit Web Site](#)

HILTON HEAD ISLAND GOLF VACATIONS

REQUEST A QUOTE

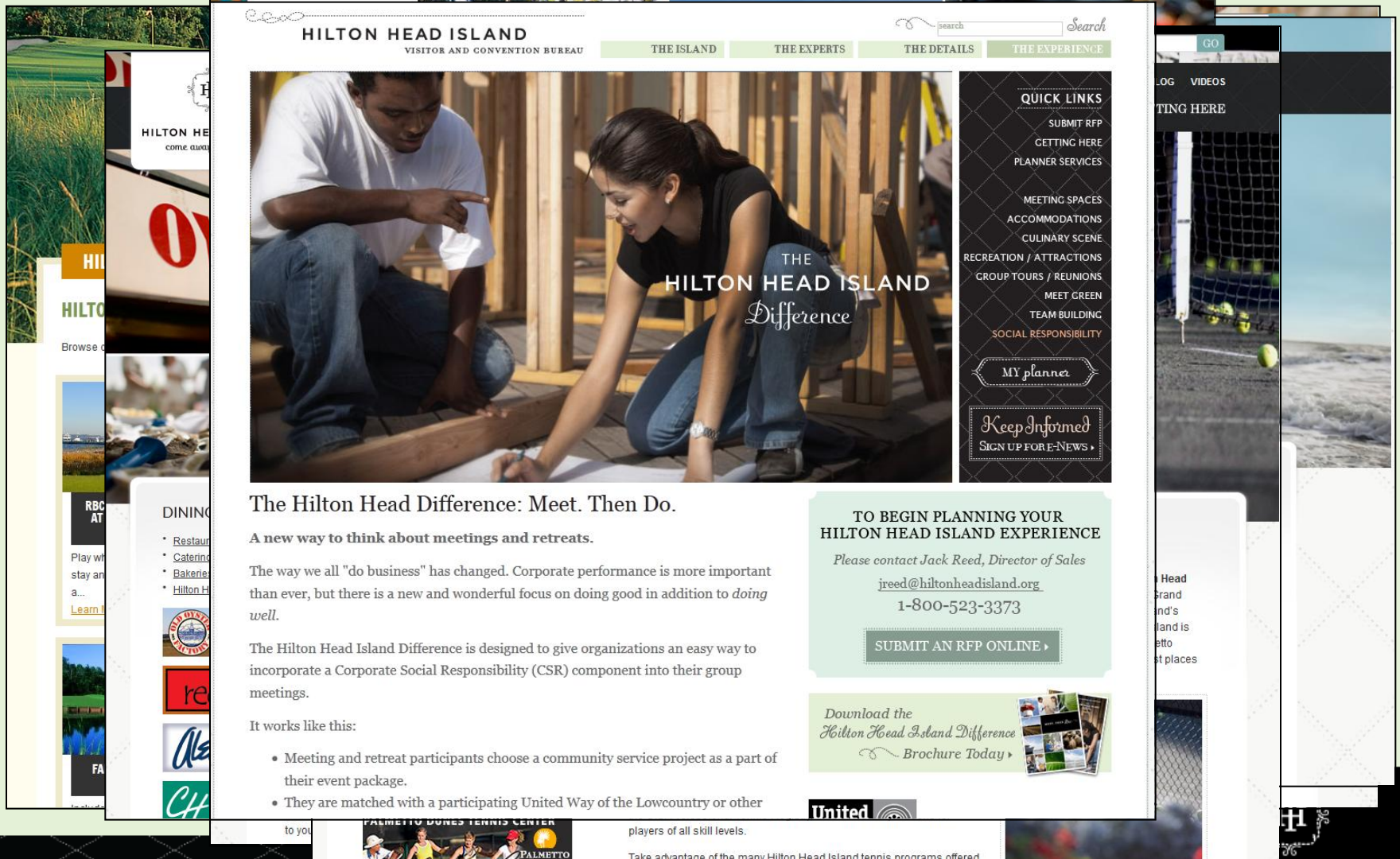
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{ Develop NextGen Brand Loyalty



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Foster Cross Industry Networking, Packaging and {Promotions



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VISITOR AND CONVENTION BUREAU

THE ISLAND THE EXPERTS THE DETAILS THE EXPERIENCE

search

THE HILTON HEAD ISLAND Difference

QUICK LINKS
SUBMIT RFP
GETTING HERE
PLANNER SERVICES
MEETING SPACES
ACCOMMODATIONS
CULINARY SCENE
RECREATION / ATTRACTIONS
GROUP TOURS / REUNIONS
MEET GREEN
TEAM BUILDING
SOCIAL RESPONSIBILITY

MY planner

Keep Informed
SIGN UP FOR E-NEWS

The Hilton Head Difference: Meet. Then Do.

A new way to think about meetings and retreats.

The way we all "do business" has changed. Corporate performance is more important than ever, but there is a new and wonderful focus on doing good in addition to *doing well*.

The Hilton Head Island Difference is designed to give organizations an easy way to incorporate a Corporate Social Responsibility (CSR) component into their group meetings.

It works like this:

- Meeting and retreat participants choose a community service project as a part of their event package.
- They are matched with a participating United Way of the Lowcountry or other

TO BEGIN PLANNING YOUR HILTON HEAD ISLAND EXPERIENCE

Please contact Jack Reed, Director of Sales
jreed@hiltonheadisland.org
1-800-523-3373

SUBMIT AN RFP ONLINE

Download the
Hilton Head Island Difference
Brochure Today

United

to you

players of all skill levels.

Take advantage of the many Hilton Head Island tennis programs offered.

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{ Moving the Needle on Destination Market Performance



Measure & Performance through Market Research
& Analysis --- Communicate Results



Generate Brand Awareness, Interest, Inquiry, Opt-ins &
Referrals for Conversion and Re-Targeting

Consistently Promote the Hilton Head Island Brand to Target
Customers via Select Content Hub Channels

Champion the Brand --- Leveraging Partnerships, Coops & Brand Extensions ---
Quality Sales Prospecting & Customer Service

Market Research ---- Promote Product Innovation & Re-Development ---
Target High-Value Visitors --- Engage in Adaptive Management



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HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

Jack Reed

Director of Sales, Visitor & Convention Bureau



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{ Group Sales Overview 2012/2013


Leads 2012 vs. 2011

- Lead up +18%
- Room nights from leads up +74%
- Definite room nights up +75%




{ Lead Prospecting

- DayBreak
- SDR
- 73 qualified prospects from 1,918 outgoing phone calls



HILTON HEAD ISLAND
VISITOR & CONVENTION BUREAU
doing business gracefully



HILTON HEAD ISLAND

This 12-mile island is unlike most other meeting destinations. There are no neon signs, skyscrapers or billboards. From the opening of its first bridge to the mainland in 1956, Hilton Head Island planners insisted that development blend with the island's natural beauty. It remains that way today.

Hilton Head Island's windswept shores are a beautiful place for invigorating new ideas and relaxing in luxury. The South Carolina Lowcountry rewards and refreshes all who visit with championship golf, brand-new spas, world-class resorts and pristine beaches. Providing space to accommodate 10 to 2,000 attendees and a convenient, environmentally planned location, Hilton Head Island is an ideal choice for meeting in style.

What's more, you can save time by working with the Visitor & Convention Bureau. Whether your group is large or small, we can gather information and make recommendations. We're committed to responding to all requests expediently, usually within 24 hours, and are fully equipped to help you create the meeting experience you need.






Closer than you think
Hilton Head Island is a great value and is easily accessed by air, on land, or even by boat via the Intra-coastal Waterway. Savannah-Hilton Head International Airport (SAV) is widely acclaimed as one of the most beautiful and welcoming airports anywhere, along with the Hilton Head Island Airport (HHI), where you can land right on the island via scheduled air service or private jets.

Meet & refresh
In addition to Hilton Head Island's luxurious hotels and resorts, consider relaxing in one of 6,000 well-equipped homes or villas for your next executive gathering or meeting.

Rejuvenating retreats
After a day of business, rejuvenate in any of Hilton Head Island's luxury spas and enjoy soothing massages and cleansing treatments amid the Island's natural beauty.

Jack Reed, Director of Sales
843.341.8361 | 866.278.0937 | JackReed@HiltonHeadIsland.org

www.HiltonHeadMeetings.org





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{ Tradeshows

- SMU
- Meeting Quest
- GSAE
- Rejuvenate Marketplace
- AENC
- SCSAE
- ASAE/Springtime
- Collaborate Marketplace



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{ Events

- Regional Leadership Summit
- Diamond Invitational Golf Tournament
- Meeting Masters Golf Tournament



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{ Monthly Lead Review Meetings



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{Year in Review

- Last year **over 700 stories and mentions** about Hilton Head Island in the media
- Represents an **ad value of over \$8.3 million**



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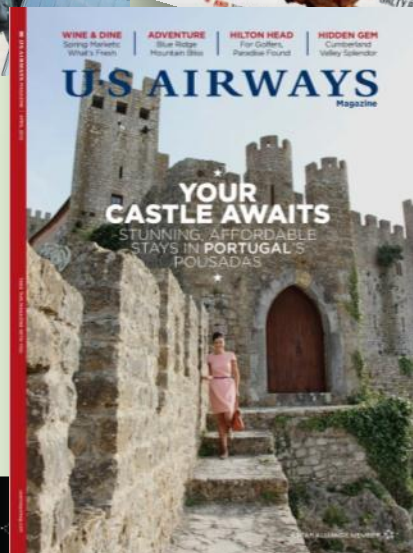
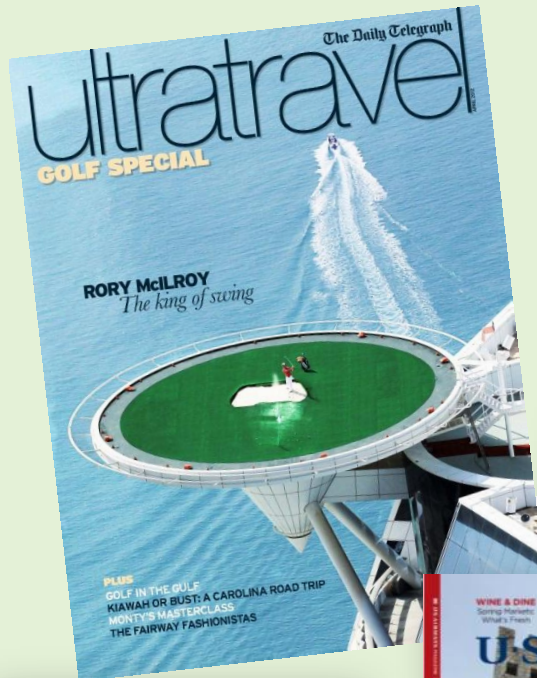
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CHAMBER OF COMMERCE

Charlie Clark
Vice President of Communications



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{ Public Relations Highlights



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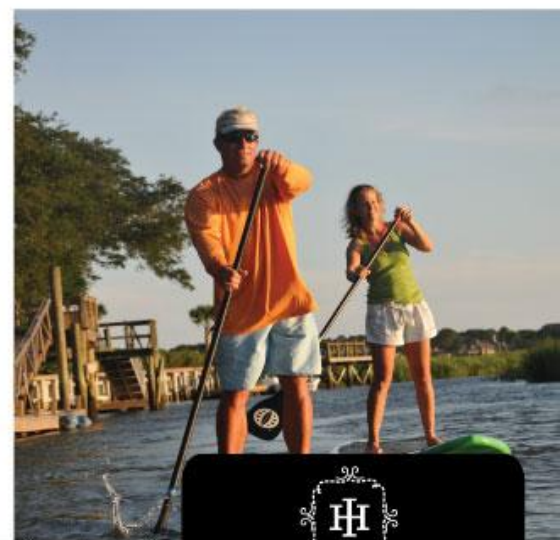
{ On the Horizon



- **Non-stop media relations:** Ongoing proactive print, online and non-traditional media outreach to reach consumers in top markets via packages, island news and in depth feature profiles
- **Canadian Outreach:** Reach Canadians in key markets via targeted media outreach and editorial appointments in media hubs (Toronto and possibly Montreal) to entice our neighbors to the north to vacation on Hilton Head
- **Upscale Travelers:** Hone in on high yield consumers via partnerships with like-minded brands (i.e. Vera Bradley, Lands End) and of course targeting media outlets catering to the high end consumer



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