



FISCAL YEAR 2022-2023

HILTON HEAD ISLAND DESTINATION MARKETING PLAN

HILTON HEAD ISLAND
SOUTH CAROLINA



**WE PROMISE A REFINED ISLAND
ESCAPE TO WHICH YOU'LL RETURN.**



TABLE OF CONTENTS

1

EXECUTIVE SUMMARY

Approach	9
Goal, Tactics and Key Performance Indicators Chart	10
Defining Our Cornerstone	12
Marketing Roadmap	16
Budget.....	18
Demographics and Personas	20

2

DESTINATION MARKETING PLAN

Digital Marketing	36
Leading With Community	42
Destination Public Relations.....	48
Meetings And Groups Sales	52
International Marketing.....	56
Collateral and Fulfillment.....	57

3

APPENDIX

2021 Tourism Economic Impact Report, Office of Tourism Analysis, College of Charleston	60
2021 Digital and Social Marketing Recap, VERB Interactive	69
2021 Public Relations Year in Review, Weber Shandwick	74
2021 Community Sentiment Survey, Executive Summary, MMGY Intelligence	82
2021 Visitor Profile Study, Executive Summary, Office of Tourism Analysis, College of Charleston.....	112



Letter from Our CEO,

To our tourism stakeholders, local businesses, and our Hilton Head Island community. Together, we weathered the storm of Covid-19. In 2021 we banded together, working to responsibly market our destination, clearly communicate our health and safety precautions, and educate guests about the importance of our delicate ecosystem.

Our efforts worked. We drove vital leads to our partner businesses from [HiltonHeadIsland.org](https://hiltonheadisland.org), secured valuable stories in the press, launched successful digital campaigns, and retained our title as America's Favorite Island® with *Travel + Leisure* and *Condé Nast Traveler* recognitions. We also learned we are capable of more than we thought possible. We shifted course, met new demands, responded to fresh challenges, and reconfigured our approach time and time again.

2021 taught us much about what we can do when we work together and how our organization can best support our community and businesses, while attracting guests and helping to deliver on our marketing promise to those visitors. And so, after consultation with local businesses, government agencies, colleagues at the U.S. Travel Association and our partner agencies, we are launching this marketing plan with a new and clear vision.

We are thinking bigger and being bolder with our approach. We are not restricting ourselves to the metrics of the past, but instead laying the groundwork for an optimistic and ambitious marketing roadmap.

At each stage of our plan, with each milestone crossed, we will be evaluating our performance and sharing our findings with stakeholders and businesses so that, together, we can learn and optimize our efforts.

The past two years have been challenging, but we have learned Hilton Head Island is perfectly, naturally designed to speak to the emotional needs of our guests, and that our community, culture, and identity is at the heart of everything we do.

I thank the Board of Directors, Marketing Council, community leaders, and residents for your partnership in the days and months to come. We move forward in the spirit of transparency and community.

Sincerely,

A stylized, handwritten signature in black ink that reads "Bill". The signature is fluid and cursive, with a long, sweeping underline.

William G Miles, IOM, CCE
President & CEO
Hilton Head Island-Bluffton Chamber of Commerce

2022 BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

CHAIR

Susana Cook
Hilton Garden Inn

IMMEDIATE PAST CHAIR

Chris McCorkendale

VICE CHAIR, BLUFFTON REGIONAL BUSINESS COUNCIL

Chris Corkern
Prudential Insurance

VICE CHAIR, FINANCE

Andrew Schumacher
Palmetto Dunes P.O.A.

VICE CHAIR, GOVERNMENT RELATIONS

Jean Beck
Hilton Head Area Realtors

VICE CHAIR, MEMBERSHIP

Andrew Carmines
Hudson's Seafood House
on the Docks

VICE CHAIR, SMALL BUSINESS

Andrea Bragg
Forsythe Jewelers

VICE CHAIR, VISITOR & CONVENTION BUREAU

Caleb Graham
Ocean Oak Resort

VICE CHAIR, WORKFORCE & EDUCATION

Terry Tadlock
Correll Insurance Group
of Hilton Head

PRESIDENT & CEO

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

BOARD OF DIRECTORS

Quinn Baldree

Truist

Steve Birdwell

The Sea Pines Resort

Joel Braun

Hargray

Mary Lee Carns

Technical College of the Lowcountry

Greg Kelly

Savannah/Hilton Head
International Airport

Diana McDougall

Coastal States Bank

Walter Nester

Burr & Forman

Dr. Al Panu

University of South Carolina,
Beaufort

Jon Rembold

Hilton Head Island Airport

Grace Stepp

Disney's Hilton Head Island Resort

Joel Taylor

Hilton Head Regional Healthcare

Mike Tighe

Westin Hilton Head Island
Resort & Spa

Ahmad Ward

Historic Mitchelville
Freedom Park

Steve Wilmot

Heritage Classic Foundation

Alan Wolf

SERG Restaurant Group

FY 2022-2023 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

Caleb Graham
General Manager,
Ocean Oak Resort by
Hilton Grand Vacations

Arts Seat

Jennifer McEwen
Director of Cultural Affairs
Town of Hilton Head Island

Attractions Seat

Rex Garniewicz
President & CEO
Coastal Discovery Museum

Convention Property Seat

Teresa Manzollilo
Director of Sales and Marketing
Marriott Hilton Head Resort & Spa

Convention Property Seat

John Munro
Vice President of Hospitality
The Sea Pines Resort, Resort
Sales & Marketing

Cultural/ Historical Seat

Courtney Young
President/CEO
ForeSight Communications, LLC

Ecotourism Seat

Mike Overton
Founder & CEO
Outside Brands

Entertainment Seat

Ryan Larson
Director of Marketing
SERG Group

Festival & Event Seat

Lindsey Harrel
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

Stacy Jukofsky
Marketing Director
Coastal Restaurants & Bars CRAB

Retail Seat

Beth Patton
Marketing Manager
Forsythe Jewelers

Select Service Seat

Sheryl Roger
Director of Sales
Courtyard by Marriott

Transportation & Tour Seat

Lori Lynah
Director of Marketing and
Air Service Development
Savannah/Hilton Head International
Airport

Transportation & Tour Seat

Jon Rembold
Airports Director
Hilton Head Island Airport/Beaufort
Executive Airport

Town Representatives

Angie Stone
Assistant Town Manager
Town of Hilton Head Island

Tom Lennox

Town Councilman, Ward 5

David Ames

Town Councilman, Ward 3

EXECUTIVE SUMMARY



APPROACH

In 2021 our marketing and communication efforts followed two core streams:

1

**DRIVING VISITATION
POST-LOCKDOWN.**

2

**PROTECTING THE HEALTH AND SAFETY OF OUR
COMMUNITY, BUSINESSES, GUESTS, AND OUR
DELICATE ECOSYSTEM.**



In FY 2022-2023 we are following the evolution of these efforts.

GOALS, STRATEGIES, AND TACTICS

The previous year taught us we are creative, nimble and capable of more than we ever thought possible. With this in mind, our goal moving forward is designed to allow for best-in-class thinking.

The overarching goal of the marketing strategy is to drive qualified visitation to the destination.

STRATEGIES

- » Build brand awareness and support qualified visitation to our destination among our target markets.
- » Enhance leisure and meeting and group business by supporting qualified visitation to the destination (e.g., attracting those most likely to appreciate and engage safely and respectfully with our attractions).

- » Drive the discovery and exploration of the destination's deeper stories, culture, art, and history.
- » Connect the on-Island experience to deliver on the marketing promise by supporting hospitality businesses with consistent messaging and tools.
- » Create an understanding of the value of our delicate ecosystem and instill pride in and demand for protecting that ecosystem and growing the infrastructure of our community (Resident and Visitor).

*A full description of all activities can be found in our Marketing Plan Strategy and Tactical Details Section. Below is a summary of all activities.

STRATEGIES



BUILD BRAND AWARENESS



ENHANCE LEISURE & GROUP BUSINESS THROUGH QUALIFIED VISITATION



DRIVE DEEPER DISCOVERY AND EXPLORATION OF OUR DESTINATION



CONNECT THE MARKETING PROMISE WITH THE ON-ISLAND EXPERIENCE



CREATE AN UNDERSTANDING OF, AND RESPECT FOR OUR DELICATE ECOSYSTEM (RESIDENT AND VISITOR)

TACTICS

Digital Display
Connected TV & Traditional Broadcast
Programmatic Advertising
Audio Advertising
Traditional Ad Placements (Print)
Social Media Marketing (Facebook, Instagram, Spotify, Pinterest, Twitter)
User Generated Content Curation
Public Relations (Media Outreach, Partnerships, Influencers and Paid Earned Media Placements)

Email Marketing
Social and Display Remarketing Advertising
Search Engine Marketing
Search Engine Optimization and Local Search
Website Platform Relaunch
Digital Experience Personalization
LinkedIn (Organic and Paid)
Virtual Networking
Meetings & Groups Paid Digital Media
Trade Marketing

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

Community Campaign and Brand Bootcamp
Resident and Visitor Surveys

Eco Campaign

KEY PERFORMANCE INDICATORS

Brand Lift Study
Website Traffic
Media Impressions

Website Traffic
Partner Referrals
Geo/Demos
Home & Villa Occupancy
Hotel Occupancy
Direct Solicitation
(phone, e-mail, social media)
Sales Appointments
(sales calls, trade shows, virtual)
Leads Sent to Properties

Increase Email Sign-Ups and Personalized
Segmentation
Increase Time Spent on Blog
Increase Social Referrals
Increase in Content Engagement Metrics
Chatbot Engagements

Community Sentiment Survey
Community Sentiment Survey Benchmarking
Business Brand Bootcamp Adoption
Visitor Profile Study

Campaign Landing Page Visits



DEFINING OUR CORNERSTONE

Tourism is a competitive landscape. Every destination must compete with every other tourism destination for their 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 want to experience the destination and meet its people.

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 on a daily basis.

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 quality of life and increasing opportunities for all residents.

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



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.

IT ALL STARTS WITH A VISIT

If you build a place where people want to visit, you'll build a place where people want to live.

If you build a place where people want to live, you'll build a place where people want to work.



THE DESTINATION MANAGEMENT CYCLE

If you build a place where business needs to be, you'll build a place where people have to visit.

If you build a place where people want to work, you'll build a place where business needs to be.

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 within this space, constantly working to ensure the community's priorities and stewardship of the brand that ultimately ensures the quality of life for all.

The FY 2022-2023 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 Hilton Head Island community'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.

DESTINATION MANAGEMENT PLAN

This 10 year plan, in partnership with the Town and community, helps ensure the continued growth of our tourism industry, while safeguarding the idyllic way of life for those that live and work here.

The plan provides a platform for community engagement, including input from business and government leaders, stakeholders and residents into what strategies are needed to ensure the long-term success of our destination. The Destination Management Plan enables a shared vision for our community, and creates strategies to address such areas as sustainable growth, product development, consumer expectations and other socio-economic factors.

STRATEGIC PLAN

The goal of the three-year Strategic Plan is to ensure alignment with our Board of Directors and collaborative efforts with our partners and community. The plan is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.

In February 2021, the Board of Directors approved and adopted the 2021-2023 Strategic Plan. The plan is organized around these 5 strategic goals:

1. Improve Alignment & Community Engagement
2. Grow Local Business
3. Expand Meetings & Groups
4. Energize Destination Development & Management
5. Sustain and Innovate as an Organization

MARKETING PLAN

The Destination Marketing Plan is an operational one-year document that outlines our overarching goal, strategies, and tactics for the coming fiscal year that our organization will implement to generate brand awareness regarding tourism. It is built on strategies and tactics to achieve our yearly goal and ultimately aligns with the Strategic Plan and Destination Management Plan initiatives.



2022-2023 MARKETING ROADMAP

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

JUL-AUG

CAMPAIGNS

Southern Living
South's Best Voting

CONTENT THEMES

Lowcountry Living/Summer
Fall Travel

TRADITIONAL MEDIA PLACEMENTS

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

SEP-OCT

CAMPAIGNS

Oyster/Dining Digital Campaign
Concours

CONTENT THEMES

Weekend Getaways
Lowcountry Dining (Oyster Season)

NOV-DEC

CAMPAIGNS

Holiday Travel
Giving Tuesday
Seafood Festival
Wine + Food

CONTENT THEMES

Thanksgiving
Holidays

JAN-FEB

CAMPAIGNS

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

CONTENT THEMES

Fresh Start
Lowcountry Love

PROJECT MILESTONES

Website - Strategy, IA, Designs
Brand Refresh Documentation Complete
Summer Campaign Development Begins
Heritage activation and campaign planning

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 Voting

CONTENT THEMES

RBC Heritage
Spring in Swing: Golf, Fishing, Biking

PROJECT MILESTONES

Website - Visual Designs and
Creative Copywriting
RBC Heritage Campaign Launches:
Digital Media, Influencers, Activation

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 Voting
NTTW Summer Campaign
Pedal Hilton Head Island

CONTENT THEMES

Wildlife/Conservation
Ready for Summer

PROJECT MILESTONES

Website - Development, Testing
& Launch before Jun 30, 2022
Summer campaign launches

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 2022-2023 BUDGET

	VCB	Town of HHI	VCB	SCPRT	SCPRT	Town of	Beaufort Co	Membership
	TOTALS	DMO	Private Sector	Dest. Specific	Co-ops	Bluffton DMO	DMO	
Revenues								
Town of HHI DMO	3,650,000	3,650,000						
Town of HHI Supplemental Grant	500,000	500,000						
Private Sector	500,000		500,000					
SCPRT Destination Specific	825,000			825,000				
SCPRT Coop	425,000				425,000			
Private Match Coop	1,500,000				1,500,000			
Town of Bluffton DMO	500,000					500,000		
B/C Bluffton & Daufuskie	365,000						365,000	
Total Revenues	8,265,000	4,150,000	500,000	825,000	1,925,000	500,000	365,000	
Membership Revenue								1,625,000
Total Revenues with Membership	9,890,000							
Expenses								
Media Buys - Leisure	1,000,000	695,432	110,269	194,300				
Social Media								
Partner Promotions	100,000	69,543	11,027	19,430				
Paid Brand Social Media	125,000	86,929	13,784	24,287				
Social Media Management	75,000	52,157	8,270	14,572				
Sub-total	300,000	208,629	33,081	58,290				
Digital Marketing								
Digital Strategy, Web Maintenance & Support	70,000	48,680	7,719	13,601				
Technology Improvements	65,000	45,203	7,167	12,629				
SEO	50,000	34,772	5,513	9,715				
SEM / Display	492,200	342,291	54,274	95,634				
Managed Web Hosting and Content Delivery Network	1,800	1,252	198	350				
eNewsletter/Drip Campaign	60,000	41,726	6,616	11,658				
Digital Contingency	10,000	6,954	1,103	1,943				
Sub-total	749,000	520,878	82,591	145,531				
Destination PR								
PR Strategy, Maintenance & Support	216,000	150,213	23,818	41,969				
Journalists/Influencers/Partnerships	75,000	52,157	8,270	14,572				
Monitoring Services (Print/Online/Broadcast Tracking)	18,200	12,657	2,007	3,536				
PR Contingency	75,000	52,157	8,270	14,572				
Sub-total	384,200	267,185	42,365	74,650				
Group Sales & Marketing								
Promotional Giveaways	30,000	20,863	3,308	5,829				
Site Inspections/ Flights for Sites	5,000	3,477	551	971				
VCB Dues and Subscriptions	95,000	66,066	10,476	18,458				
Trade Sponsorships	15,000	10,431	1,654	2,914				
Tradeshows	100,000	69,543	11,027	19,430				
FAM / In-Market Events	50,000	34,772	5,513	9,715				
Focused Service	5,000	3,477	551	971				
SC Sports Alliance	5,000	3,477	551	971				

SEM	45,000	31,294	4,962	8,743
Social Media	80,000	55,635	8,821	15,544
Website	10,000	6,954	1,103	1,943
Collateral	10,000	6,954	1,103	1,943
Trade Media	10,000	6,954	1,103	1,943
Sub-total	460,000	319,898	50,724	88,378
International				
Coastal SC USA Coop	45,000	31,294	4,962	8,743
International Promotions	80,000	55,635	8,821	15,544
International Tradeshows	50,000	34,772	5,513	9,715
Sub-total	175,000	121,701	19,297	34,002
Destination Photography & Video				
	125,000	86,927	13,784	24,287
Insiders/Collateral/Fulfillment				
Vacation Planner	250,000	173,858	27,567	48,575
Fulfillment	125,000	86,929	13,784	24,287
Toll-Free Phone	4,000	2,782	441	777
Sub-total	379,000	263,569	41,792	73,640
Research & Planning				
	206,750	143,780	22,798	40,171
VCB Sales, Mkt. Services & Ops:				
Personnel	1,155,000	715,400	58,310	63,525
Benefits	165,000	102,200	8,330	9,075
Operations	330,000	204,400	16,660	18,150
Sub-total	1,650,000	1,022,000	83,300	90,750
HHI Supplemental Grant				
Golf	210,000	210,000		
Meetings & Group	190,000	190,000		
Festival and Events	100,000	100,000		
VCB Sales, Mkt, Visitor Services & Operations	0	0		
Sub-total	500,000	500,000		
SCPRT				
SC PRT - Leisure	850,000			850,000
SC PRT - Sports	363,250			363,250
SC PRT - Meetings & Groups	500,000			500,000
Sub-total	1,713,250			1,713,250
Town of Bluffton DMO				
Promotions	360,000			360,000
B/C Bluffton & Daufuskie DMO				
Promotions	262,800			262,800
TOTAL VCB EXPENSES	8,265,000	4,150,000	500,000	825,000
Total Expenses with Membership	9,890,000		1,925,000	1,625,000
				9,890,000
Expenses for HHI-related marketing programs				
Expenses for other marketing programs				

DEMOGRAPHICS AND PERSONAS

Hilton Head Island's visitor foundation was built on identified drive markets, ensuring overnight stays and from a long-term lens, home ownership. We nurture that foundation and look to our real-time data sources, such as Google Analytics, in addition to research, partnering with the Office of Tourism Analysis at the College of Charleston and the University of South Carolina Beaufort. Using these insights we are able to extract visitor persona detail which allows us the ability to further refine our messaging to a more qualified potential consumer.

Today, as we adjust to the new traveler needs, we will continue to keep our demographics and key personas at the forefront, but will adapt as necessary in the short-term to address the consumers travel sentiment. We will expand our drive radius as travelers are willing to drive

further distances post quarantine and continue to focus on our short-haul fly markets, supporting new air lift as it becomes available.

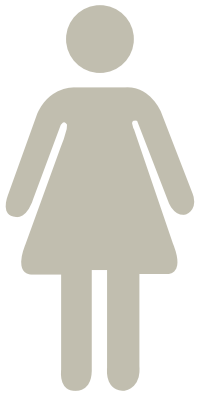
We have identified the following key persona groups as:

- Families
- Snowbirds
- Sports Enthusiasts
- Weekenders
- Culinary Explorers
- Arts, History and Cultural Enthusiasts
- International Travelers

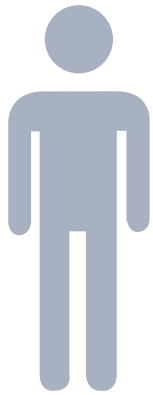


OUR TARGET LEISURE TRAVELER

2021 VISITOR PROFILE STUDY

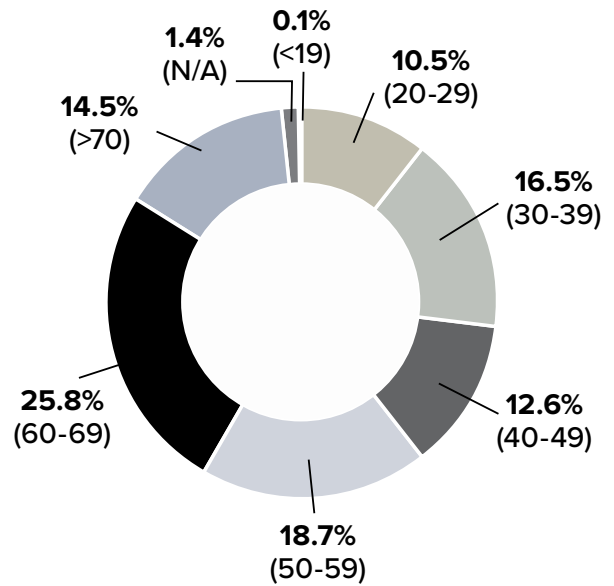


62.5%
FEMALE



37.4%
MALE

AGE DISTRIBUTION



\$150K+
Affluent Traveler



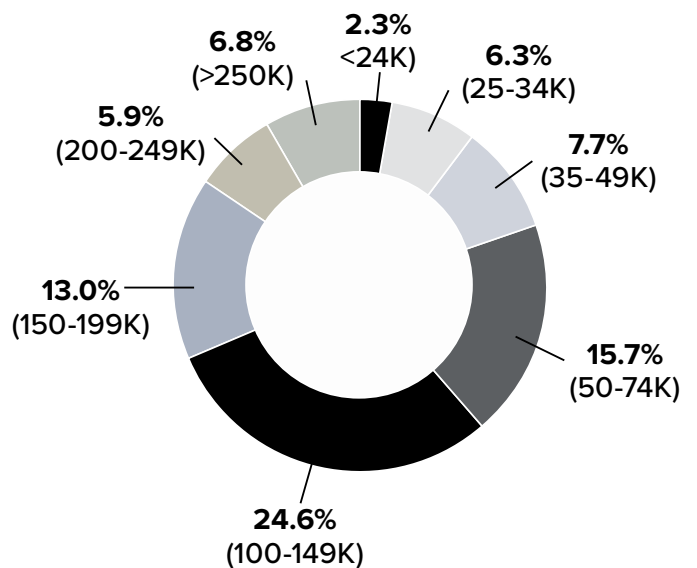
56.7%
Undergraduate
Degree or Higher



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

*2021 Visitor Profile Study:
Office of Tourism Analysis, College of Charleston

HOUSEHOLD INCOME DISTRIBUTION

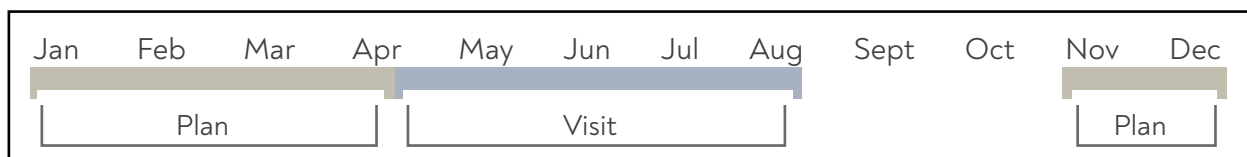




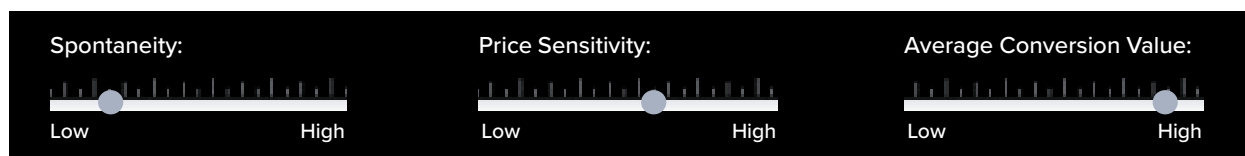
FAMILY

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

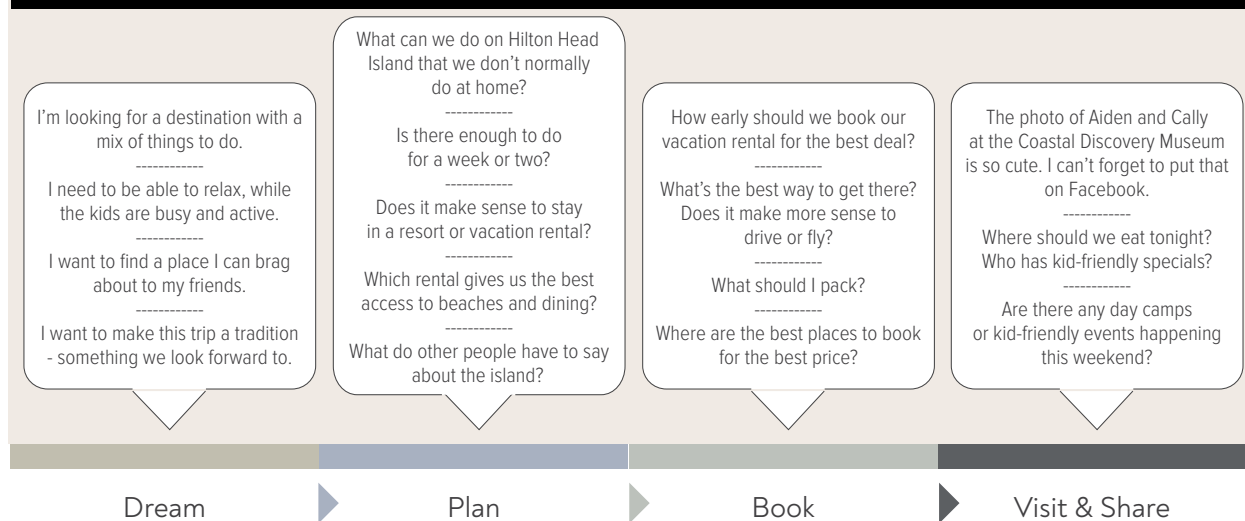
PREFERRED ACTIVITIES & ATTRACTIONS

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





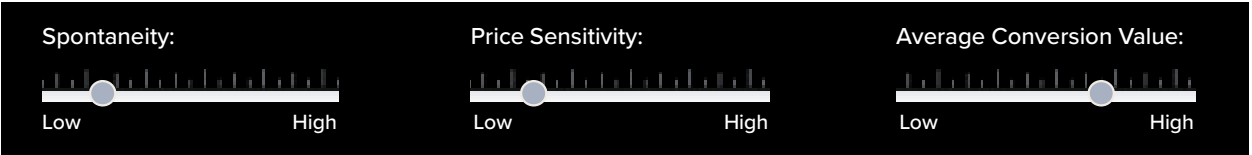
SNOWBIRDS

TRAVEL OBJECTIVE

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



Snowbird Travel Habits



WHO THEY ARE

- Traditional
- Values Family Time
- Enjoys the Finer Things
- Active & Health Conscious

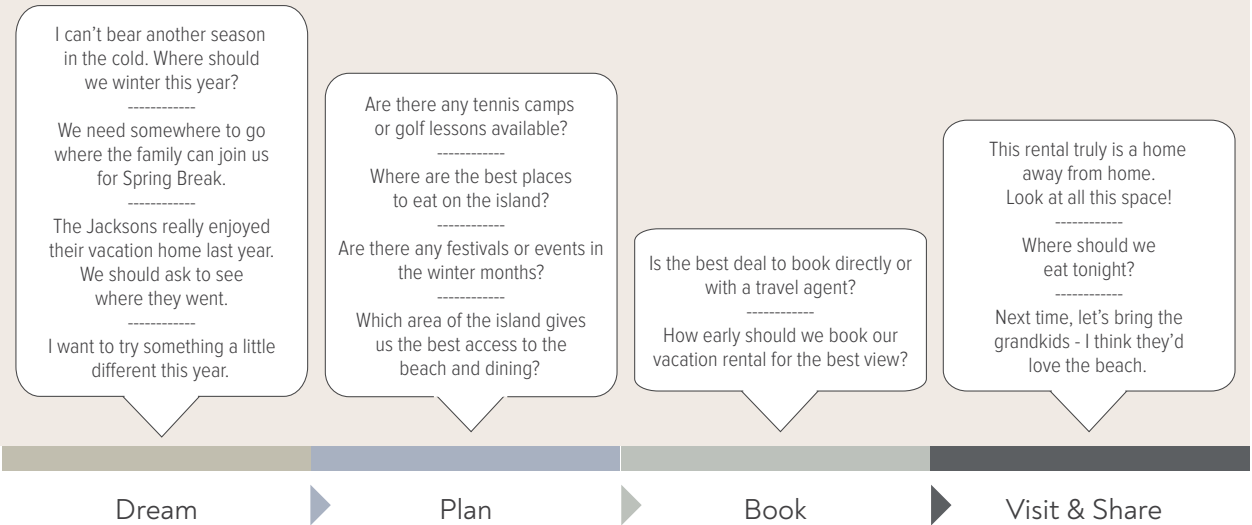
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

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

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

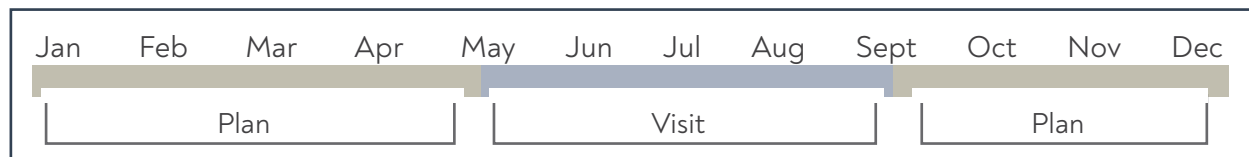




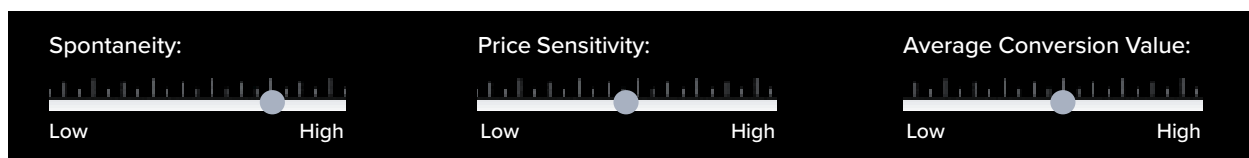
SPORTS ENTHUSIAST

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

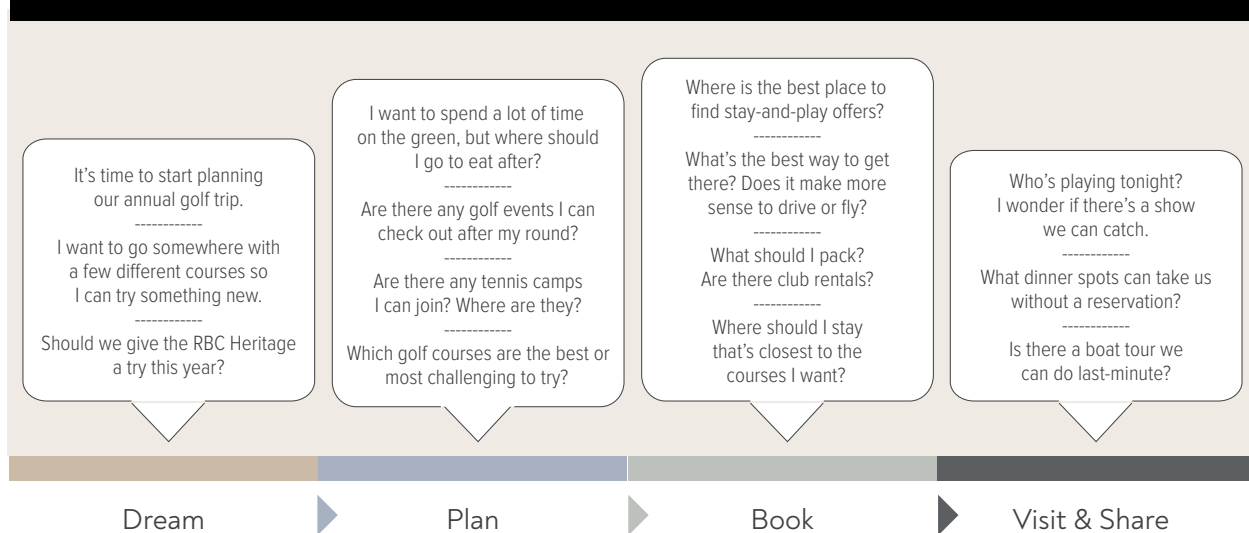
PREFERRED ACTIVITIES & ATTRACTIONS

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

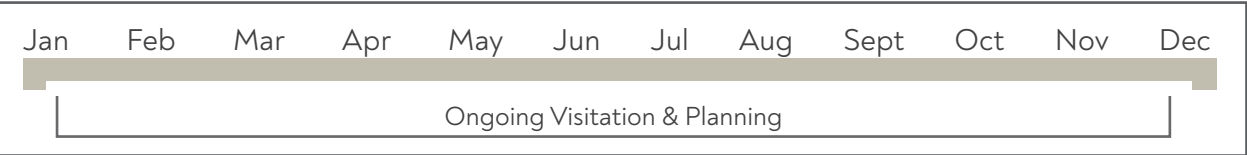




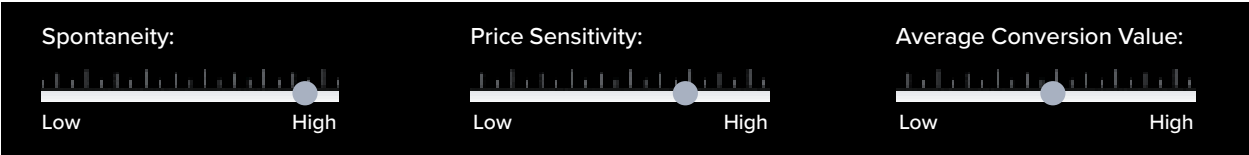
THE WEEKENDERS

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

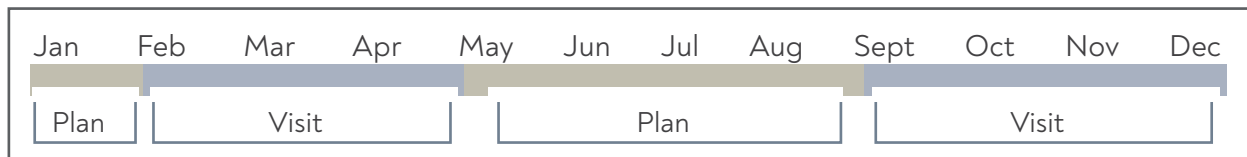




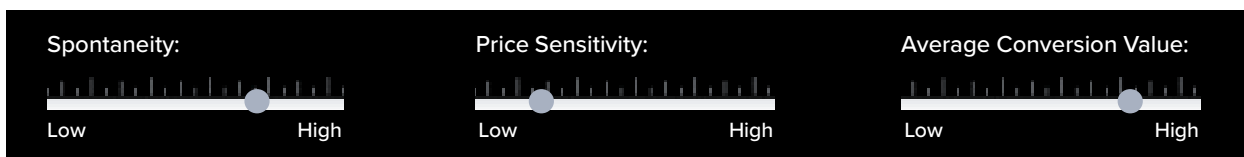
CULINARY

TRAVEL OBJECTIVE


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




CULINARY TRAVEL HABITS



WHO THEY ARE


Values
Authenticity


Spontaneous
& Social


Seeking an
Immersive
Experience


Unconventional

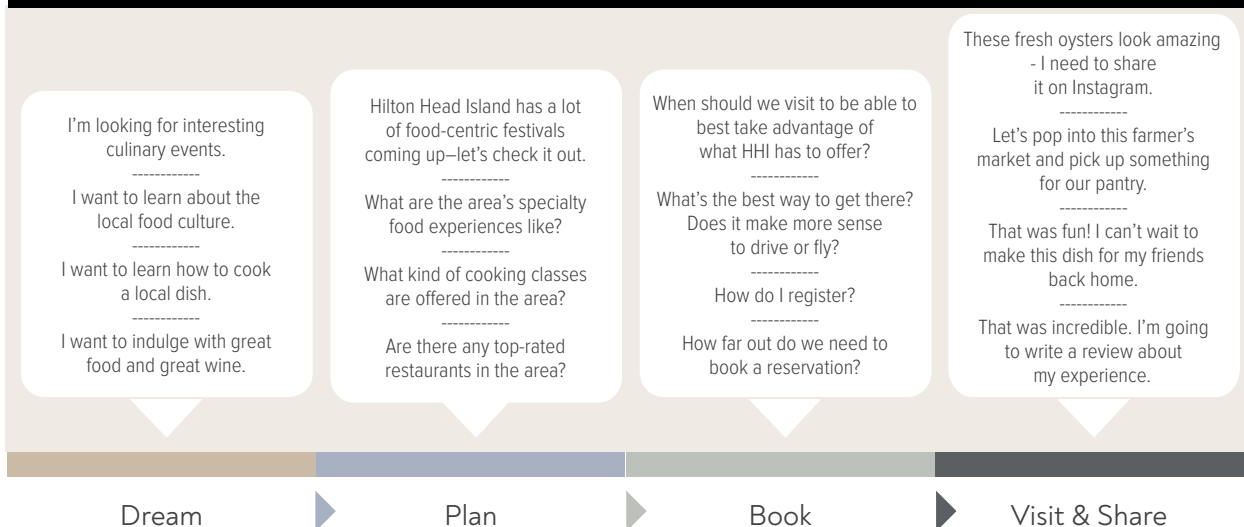
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
Forums & Blogs
Pinterest

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

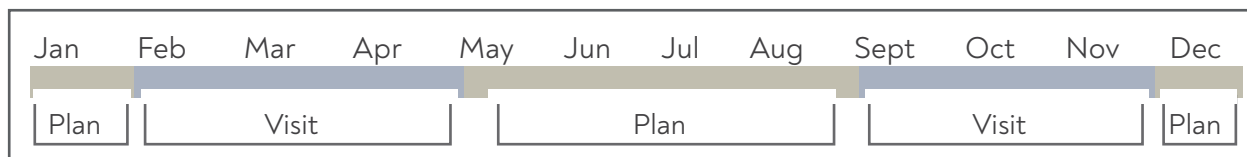




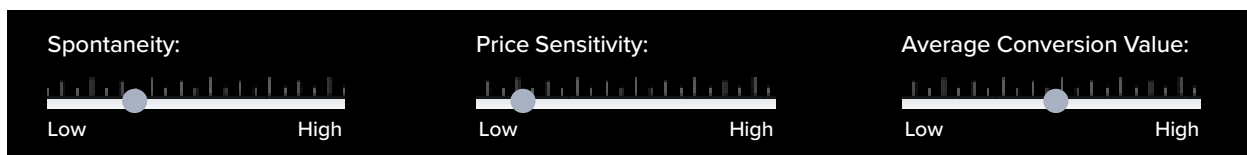
ARTS, HISTORY & CULTURE

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

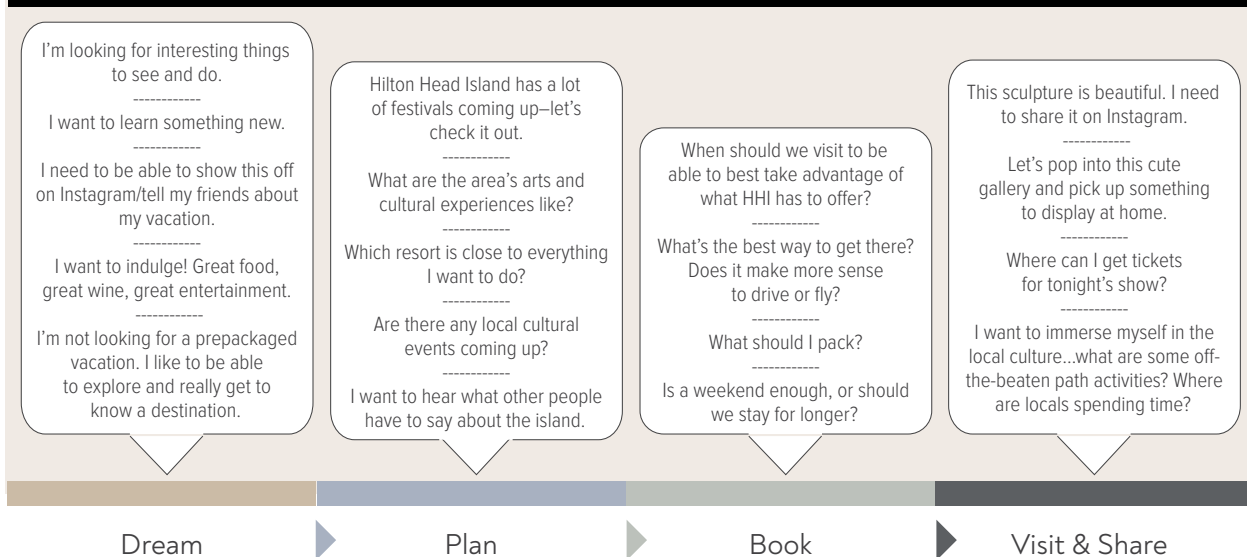
PREFERRED ACTIVITIES & ATTRACTIONS

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

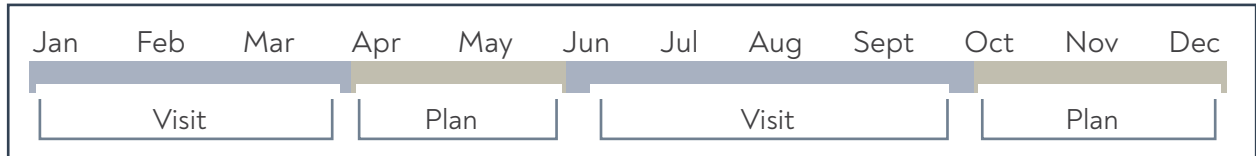




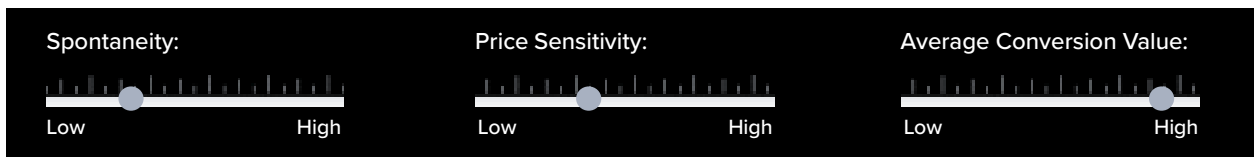
INTERNATIONAL VISITORS

TRAVEL OBJECTIVE

Find a vacation spot that will inspire and that offers something different than where we're from. Escape the everyday, relax and recharge in a destination that's fresh, and different from home.



INTERNATIONAL TRAVEL HABITS



WHO THEY ARE



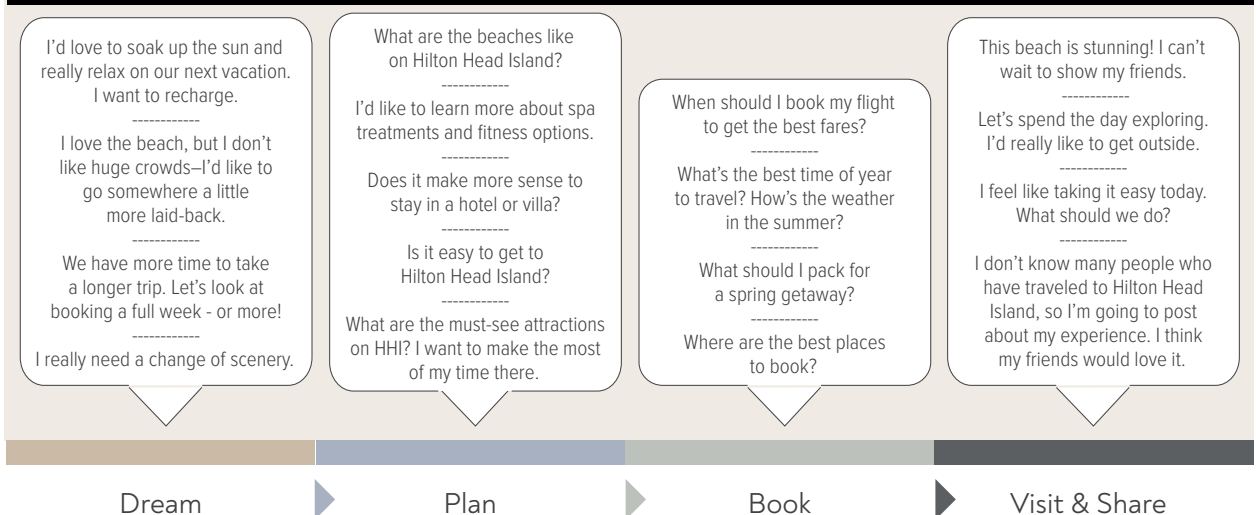
PREFERRED ACTIVITIES & ATTRACTIONS

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

MARKETING CHANNELS & FORMATS

Facebook Videos
Instagram
TripAdvisor
TV
Online Video
Forums & Blogs
Pinterest

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



MARKETING PLAN STRATEGIES & TACTICAL DETAILS

The ultimate goal of the marketing strategy is to drive visitation to the destination through a series of demand creation and demand capture marketing activations. As outlined previously, not only does the strategy aim to drive qualified visitors to the destination, but also to support the discovery and exploration of new destination experiences that extend past the core product offering that our brand loyalists have grown to love.

Each individual campaign that is implemented to drive exposure for the destination will be deployed based on a series of defined goals that align with the overarching goal for the marketing plan. All tactics, creative, campaigns, and overall channel strategies will support the goal and will align with the specific area of the customer journey.

The 2022-23 marketing plan will consist of the following marketing channels:

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

AREAS OF FOCUS

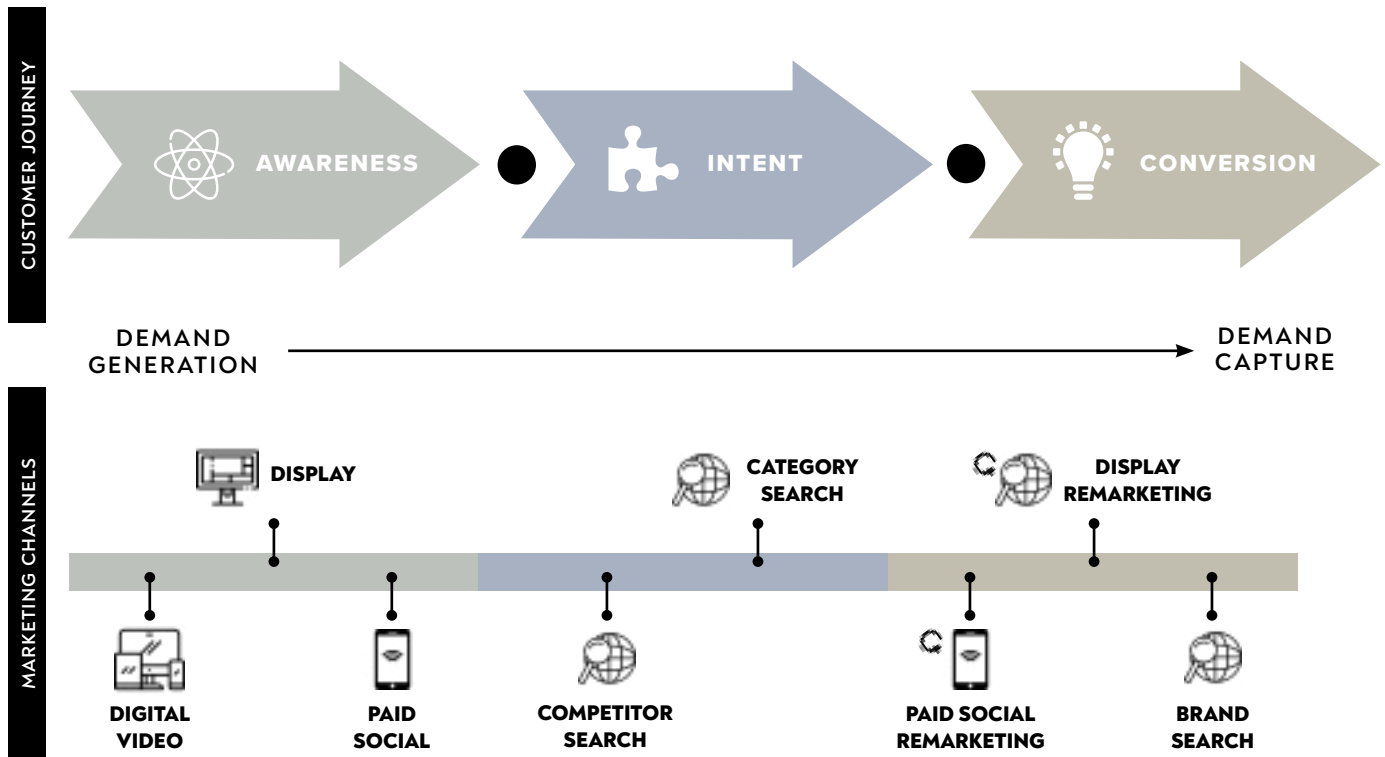
The omnichannel marketing approach for the destination requires focus, nimbleness, and discipline to ensure all marketing activities support the overarching goal for the 2022-23 marketing plan. Although it is critical for the destination to capture as much existing demand as possible to support the overall performance of the destination, it's essential that we connect with new, qualified visitors to support the long-term economic growth of the destination.

A FOCUS ON THE CUSTOMER JOURNEY

The Hilton Head Island marketing plan touches qualified visitors at each stage of the customer planning journey from initial discovery and booking, through to the in-market and post-visit experience. Overall, Hilton Head Island and the partners throughout the destination have a shared responsibility to inspire visitors, drive bookings, and deliver on the authentic destination experience.

In 2022-23, to support our primary goal, our role as a destination is to captivate qualified travelers and meeting planners by creating an emotional connection to the destination through targeted marketing communications and compelling brand

AUDIENCE TARGETING WITH DIGITAL MEDIA



storytelling. Hilton Head Island will continue to utilize a full funnel marketing strategy to drive increased optics and referrals to partners throughout the region. Our efforts will place a specific emphasis on more awareness-focused marketing channels utilizing immersive and authentic brand content to reach new qualified prospects that the brand can deliver for our partners, while continuing to nurture repeat visitors and brand loyalists with our mid funnel tactics.

THE HILTON HEAD ISLAND BRAND

Throughout 2021, Hilton Head Island worked on a multi-month branding initiative to identify the personality, tone and voice, and visual strategy for the brand. This process will play a critical role moving forward as we communicate with qualified audience segments while positioning the destination for a guest's next vacation, group outing, or meeting/

conference. Hilton Head Island as a whole has a strong brand, which is supported by the consistent year-over-year accolades received by the brand.

As we continue to implement our recovery marketing efforts, an emphasis on communication from a consistent visual, creative tone and voice perspective will be critical, as all visitor touchpoints should feel the same. This will help us to support the goal of connecting with new and returning qualified visitors. Moving forward, we will continue to ensure our brand and creative is innovative, impactful, and consistent across all consumer touchpoints, leaving a strong lasting impression of Hilton Head Island.

THE WEBSITES

The Hilton Head Island collection of websites serve as the single-most important touchpoint for the brand next to the destination experience itself. In 2022, a number of web platform development and technology upgrade initiatives are being

implemented to streamline the Hilton Head Island digital presence, and enhance the overall user experience while driving increased conversion for the destination.

Web platform development initiatives include the development of the new HiltonHeadIsland.org destination platform, as well as two dedicated websites to support both our Weddings and Meetings & Groups marketing initiatives. Each of the three websites will be overhauled completely from a design and User Experience perspective to support both the new Hilton Head Island brand, tone and voice, as well as an updated content strategy to support the overarching goals of the marketing strategy for the destination.

PERSONALIZATION

Utilizing first-party and zero-party data, the brand will work to gain a clearer understanding of our prospective visitors' behaviors and implicit desires to build a personalized, one-to-one communication strategy. This starts at the HiltonHeadIsland.org website and extends to our email communication and throughout our entire digital marketing strategy.

Hilton Head Island will create data-driven, always-on, relevant, and compelling content strategy that matches the visitors' mindset and interests. As prospective visitors move through their journey the brand will continue to tailor messaging utilizing sequential storytelling to make the destination experience more relevant to each individual visitor. Ultimately, the ongoing analysis of audience data will provide us with insights to make better choices about market opportunities and high-value audience segments, which will ultimately lead to higher engagement with the destination and more outbound referrals to partners.



EMAIL & CHATBOT

Increased efforts to personalize the customer journey will include an revamp of the

destination's email preference center, along with new and relevant drip campaigns mapped to the refreshed segments.

The "Stella" automated Chatbot will work through a constant evolution process this year. Using data around the most commonly submitted user FAQs, Stella will be enhanced on a monthly basis with new capabilities, allowing her to answer more questions more quickly, directing potential guests to the exact information they are looking for, thereby increasing the likelihood of a conversion.



Evolving Stella allows the destination to personalize our potential guests' experience and take the opportunity to surface itineraries, experiences, and content that they may not discover on their own, thereby supporting discovery and exploration.

SOCIAL & CONTENT MARKETING

Our priority with social media and content strategy is always to increase interest and conversions for our partners as a result of dynamic, aspirational destination content that entices our followers to visit Hilton Head Island. To further align with our Community first approach we will create and share partner spotlights, and educate our followers on the history of Hilton Head Island to help assist them in becoming more personally connected to the destination.

We will do this by:

- » Co-branded/co-hosted giveaways and sweepstakes with partners to celebrate events, offers, milestones, and accolades.
 - » Can be conducted directly on social media platforms in the case of smaller prizes where social media exposure is a primary goal
 - » Larger prizes and/or promotions where lead generation is a goal can be hosted on HiltonHeadIsland.org
- » Share a series of engaging and informational videos/blogs that highlight Hilton Head Island locals and members. Not only sharing what they do/what their business is, but how they came to live and work on Hilton Head Island, why they stayed, and what they love most.
- » Elevated social media messaging for organic partner social media co-op programs.
 - » Instead of general awareness-focused messaging, Visit Hilton Head will pivot to timely, offers-focused copy. Partners are welcome to submit notes about their top-priority messaging and/or refreshed imagery on a monthly basis.
- » Focusing more on community conversations involving partners and overall members of the community and social listening.
- » Highlighting more eco-friendly and sustainability initiatives put forward by the community.

CHANNEL PRIORITIES FOR 2022-23

These are the channels that best support Hilton Head Island's goal, and will be our focus for FY 2022-2023:

FACEBOOK

Facebook is our most high-value social channel. At 231.7K likes, our page has the largest number of followers compared to our other social channels. In 2022-2023, we'll continue to build our Facebook community by releasing engaging, current short-form video while also increasing our volume of long form video content. We will place a focus on CTAs that foster community engagement, increase sustainability/eco initiatives awareness, marquee events, co-op partnerships, and campaigns.

INSTAGRAM

Instagram is always evolving with new layouts, new features, add-ons, business tools, and more. As it continues to change, we will adapt to keep up with what will keep us at the forefront of users' feeds. By creating authentic, engaging content and staying current with its newest offerings, we can continue to break through the noise and ensure our message resonates with and grows our digital audience.

TWITTER

Twitter is still a strong social performer for Hilton Head Island. We will continue to utilize this platform to distribute news, engage in real time conversation, and repurpose top-performing content. In addition to that, we will start to jump into new trends and reintroduce twitter chats to engage our members.



People come to Pinterest to be inspired, find travel guides, try new things, and learn about attractions/experiences. With international travel returning in 2022-2023 we will enhance our efforts to inspire people to book a trip to Hilton Head Island. We will provide them with easy-to-read, fun new itineraries, wellness options, and eco-friendly/sustainable experiences.

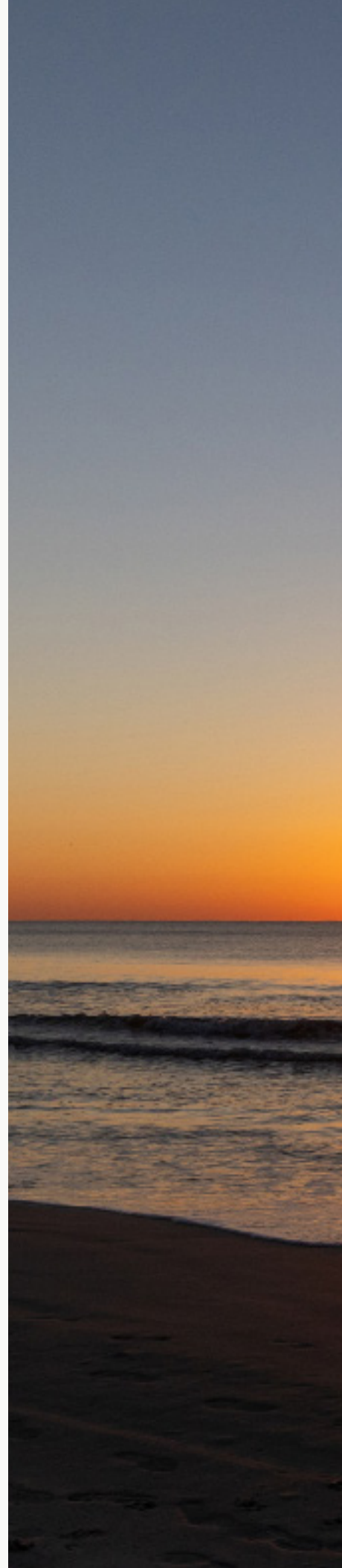


The Visitor & Convention Bureau LinkedIn account is a natural home for all destination accolades, announcements, awards, and relevant news like additional flight routes, new partner openings, and other destination-specific news. We will continue to share updates that are relevant to our LinkedIn audience and deploy paid LinkedIn campaigns targeting meeting & event planners and other industry professionals with news, special offers, and valuable content as appropriate.



With 286 million users and over 4 billion playlists, Spotify is a core platform for engaging with customers. Through playlists, collaborations, and paid ads, Hilton Head Island will continue to influence and reach new and existing audiences. With this in mind, we will continue to share songs that are trending, feel-good, and implement wellness-themed audio curation in 2022-2023.

Additionally, we will reimagine the way we report on Social Media. By using metrics that specifically help us understand the social strategy's role in the customer journey, we will measure our audiences' consumption of storytelling content and the qualified leads we can push closer to a visitation experience. We will also benchmark competitor performance by using a set collection of metrics that allow us to analyze what is working for them and how we can capitalize on our own channels.



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 more topical content for specific audiences. Formats we'll test and create in 2022 include:

- » Long-form, editorial pieces
- » Recipes and "insider tips" from partner restaurants, hotels, and attractions
- » Itineraries:
 - » For Different Demographics
 - » For Different Interests
 - » For Different Vacation Lengths
- » Hilton Head Island Local features

LEADING WITH COMMUNITY: OUR CORNERSTONE PLAN

Hilton Head Island residents continue to connect more deeply with our tourism marketing approach. With that transparency comes confidence in the efforts and opportunities to share and show their “pride of place”.

TELLING COMMUNITY STORIES

The destination is made up of thousands of personal stories. Our community makes us who we are as a destination. In the coming year, we will work to tell more stories of our unique business owners, cultural experts, artists, chefs, and local characters. These stories will be shared across our organic channels and support efforts to drive deeper discovery and exploration of our destination.

Initial content designed to highlight our local businesses, along with those who bring authenticity and depth to our culture, heritage, and cuisine experiences, will also be enhanced, and include Q&A series with entrepreneurs on LinkedIn, Instagram features, and video features.



SUPPORTING THE COMMUNITY & DELIVERING ON THE BRAND PROMISE

To provide a positive, consistent experience for our visitors and to support our community, we will develop a brand “bootcamp” and toolkit to support front-line hospitality teams with consistent, on-brand messaging related to resourcing issues/changes in service levels, and adjustments to the overall experience in the destination.

Supporting this will be additional, grassroots efforts to amplify the community’s insights, ideas, and passion points in ways that effectively reach our past and potential guests. This community campaign will empower our residents and businesses to share consistent, cohesive messaging about the destination in ways that are authentic to them.



NURTURING NATURE

The Visitor & Convention Bureau will continue to position Hilton Head Island as an upscale luxury escape filled with genuine experiences of all kinds.

ECOSYSTEM PROTECTION CAMPAIGN

In 2020-2021 we began to educate and inform residents and guests about how they can play a role in protecting our delicate ecosystem.

In 2022-2023 we will grow this approach, positioning the participation in protecting the destination's delicate ecosystem as a reason to support Hilton Head Island in and of itself.

Inspired by destinations who've taken this step, such as the Faroe Islands and Destination British Columbia, marketing efforts this year will include an integrated campaign that includes an added incentive for visitors: the opportunity to actively participate in the destination's research and protection efforts.

We will also expand beyond our Sea Turtle Season, to grow our educational and experiential offering around dolphins, birds, and the beaches themselves.

Businesses will have the opportunity to be actively involved in the efforts as well as ongoing ways to educate visitors. This can include the expansion of current one-sheet information provided to guests, adoption program, and beach clean ups for example.





RESIDENT AND VISITOR SATISFACTION SURVEYS

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 in place for both surveys and will continue with those efforts. Using the results and insights from the first year of this initiative, we will move forward with a comprehensive plan to reach our community.

As part of ongoing engagement and education within the community, we will provide regular tourism updates throughout the year to enhance residents' awareness and appreciation for tourism on Hilton Head Island. Ensuring our number one economy is for the benefit and well-being of everyone in the community. By ensuring the success of tourism to Hilton Head Island, we are stimulating the regional economy while enhancing the quality of life for all.

LEISURE MEDIA PARTNERSHIPS

It is no secret that the popularity of Hilton Head Island as a destination continues to increase. 2021 further amplified that sentiment as Hilton Head Island was well positioned with the product travelers were looking to experience. Recent accolades from *Condé Nast Traveler*, *Travel + Leisure*, and *Southern Living* are proof that Hilton Head Island is now a global brand in regards to visitors wishing to experience the Lowcountry. Research, reservation data from our partners, and referral analytics indicate visitors are eager, ready and willing to travel. Accolades earned by the destination bring our brand to the top which helps to enhance the overall awareness of Hilton Head Island as a safe, "must-visit" destination. We will look 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. This was an important factor pre COVID-19, but is even more so as we leverage on the pent-up demand for travel and travel restrictions. 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.

Condé Nast
Traveler

BY THE NUMBERS

3.3M

TOTAL PRINT
AUDIENCE

6.2M

DIGITAL
UNIQUE USERS

9.2M

SOCIAL
FOLLOWERS

\$17B

READERS SPENT
ON TRAVEL

**TRAVEL+
LEISURE**

BY THE NUMBERS

\$326K

AVERAGE HHI

7.4M

TOTAL PRINT
AUDIENCE

12.3M

DIGITAL UNIQUE
VISITORS

13.3M

SOCIAL
FOLLOWING

83%

SEARCHING FOR
FUTURE TRAVEL IDEAS
FROM T+L DURING
THE PANDEMIC

71%

ARE COMFORTABLE
TRAVELING
DOMESTICALLY

Full-Time
TRAVEL

BY THE NUMBERS

1.5M+

SOCIAL
FOLLOWERS

100K+

EMAIL
SUBSCRIBERS

250M+

FOLLOWERS ACROSS
OUR NETWORK

**AMERICAN
EXPRESS**

BY THE NUMBERS

20M+

UNIQUE VISITORS
MONTHLY

2-5X

HIGHER RESPONSE
RATE THAN INDUSTRY
AVERAGE

PRIVILEGED AND CONFIDENTIAL

An aerial photograph of a marina filled with numerous white and blue boats docked along a wooden pier. The water is dark blue with bright, shimmering reflections of sunlight. To the left of the marina, there is a dense forest of tall, green trees. In the background, several multi-story buildings with red roofs are visible, nestled among more trees. The overall scene is bright and sunny, suggesting a clear day.

DESTINATION PUBLIC RELATIONS

In 2022-2023, the Hilton Head Island Visitor and Convention Bureau will employ a forward-looking strategic, and thoughtful public relations plan that is designed to make us stand out from the competition and convert first-time visitors to repeat guests.

There continues to be a built-up demand for travel over the past two years and we continue to take advantage of that momentum. Consumer sentiment is changing, and travelers are ready to go big and experience destinations in unique ways. They are looking more than ever before to understand the communities they visit and immerse themselves in local culture and environments. There is a new era of vacationers seeking amenities and vacations that are experiential, comforting, and engaging, and we are prepared to harness this energy to continue to stay top-of-mind with our loyal, repeat guests as well as new visitors.

As we continue to adapt with the ever-changing landscape, we're making significant and strategic shifts to our priorities. While we will rely on our tried-and-true pillars, we are remaining agile while looking towards the next wave of media trends. These imperative shifts will allow us to deliver a steady drumbeat of media coverage and social chatter to ensure Hilton Head Island remains top-of-mind as an ideal getaway for upscale travelers.

MEDIA LANDSCAPE

We always keep our finger on the pulse of the media and stay on top of the trends that dictate the ever-evolving landscape and adapt accordingly. Key factors driving changes across the media industry include:

FREELANCER BOOM: Just when we thought the worst was over, we're continuing to see publications fold. Following a couple years of layoffs, outlet closures, and shifted beats, there is more dependence on freelancers. There is now a

larger pool of freelancers to tap into as we explore storytelling opportunities. However, when it comes to press visits, confirming assignments is becoming more difficult to secure ahead of travel.

COMPETITION: The competition remains fierce with all sectors competing for consumer attention. Breaking through requires unique storytelling hooks to entice media and consumer interest and answer the "why now" question more urgently than ever.

NEW MEDIA: The importance of real-time video remains crucial to communication efforts and will be a part of everything we do.

RELOCATION: While many companies are starting to open for hybrid in-person work and collaboration, many New York City residents and media who originally left the city in 2020 have made this move permanent. Media are now scattered throughout the country and globe, adjusting to this flexible lifestyle. While many have now found themselves a hop, skip and a step away from the Lowcountry, the now-limited NYC media market is stretched thin for when local media events do return.

OPPORTUNITIES FOR HILTON HEAD ISLAND

The change in consumer habits presents opportunities for Hilton Head Island to leverage existing assets and tap into current and anticipated trends such as:

OUTDOOR EXPERIENCES: People are continuing to crave outdoor experiences, whether it's an adventurous activity, day on the beach, or dining experience.

LAST-MINUTE TRAVEL: Travelers are becoming more and more flexible in plans, with last-minute bookings increasing by 50% according to Kayak.

GOING BIG IN 2022- 2023: With 65% of travelers planning to "go big" this year with travel plans (Expedia), travelers are prepared and excited to loosen their purse strings in favor of an all-out vacation filled with extravagant-yet-comfortable experiences.

TARGET AUDIENCES

While our targets are familiar, we are going to dive even deeper as we dissect audiences that are most likely to travel to Hilton Head Island in the new normal.

FAMILIES AND GENERATIONAL TRAVEL: Family travel will remain a primary target audience for Hilton Head Island, especially families who may have limited travel over the past two years and are now looking to go all-out for a memorable vacation.

REGIONAL DRIVE MARKETS: We'll continue to inform those in regional drive markets with easy access to the destination of the outdoor activities, unparalleled Lowcountry cuisine, and southern charm.

AFFLUENT CONSUMERS: With flexible office schedules trending paired with the pent-up demand for travel, we'll focus on those looking to purchase a second home, permanent home, or those with disposable income for extended stays on-Island.

PRIORITY FOCUS AREAS

As we look to place Hilton Head Island in top-tier media across platforms, we've aligned with our PR agency, Weber Shandwick, on prioritizing areas where we see the most growth opportunity, high consumer interest and strong mediability.

With our "hidden gem" stories continuing to be strong fodder for the media, we will explore angles across all verticals to showcase that there is much more to Hilton Head Island than meets the eye.

CULINARY: We'll tell culinary stories year-round to bring a slice of the Lowcountry to consumers' screens. We'll also uncover recipes, chef stories, Lowcountry signature dishes, and more to bring Hilton Head Island culinary experiences to life.

WELLNESS: With self-care and wellness tipping the trends scale, we'll tout Hilton Head Island's active

adventure offerings as well as on-island experts to showcase the variety of wellness experiences available.

OUTDOOR: We'll highlight Hilton Head Island's outdoor offerings, miles of beaches and bike paths, and year-round temperate weather to position the destination as an outdoor haven. Will also emphasize the island's unique commitment to the environment.

CULTURE: We will continue to tap into the island's rich Gullah history and culture. We'll focus on angles and spokespeople that authentically honor the traditions and the history of the community. We will continue to showcase Historic Mitchelville Freedom Park as a unique part of the Gullah story.

SHOULDER SEASON/MARQUEE EVENTS: We'll encourage visitation to the destination during the spring and fall by leveraging access to on-Island experiences.

2022-2023 PR TACTICS

We'll employ a number of public relations tactics to seamlessly spread destination news far and wide throughout the year. Public relations efforts will include:

VISITING JOURNALIST/INFLUENCER PROGRAM:

Largely polarized throughout the pandemic, we're seeing media sentiment continue to move closer to pre-pandemic levels. We will customize itineraries that highlight priority themes and messaging for 8-10 journalists for individual press trips while still allowing media to experience true southern hospitality and have a taste of the Lowcountry.

PAID INFLUENCER PROGRAM: Consumer habits are constantly changing, especially when it comes to travel and curating future itineraries. Our approach to influencers remains tiered and strategic to leverage niche audiences to offer engaging content leveraging existing platforms. We'll explore both trade and paid influencer partnership opportunities with a focus on how to experience Hilton Head Island.

ALWAYS-ON MEDIA RELATIONS: Our news bureau will inspire travel to the destination by leaning into themes that are currently resonating most with travelers. Story angles will be identified to highlight new developments and trends alongside priority storytelling pillars like history, culture, and much more.

STRATEGIC PARTNERSHIPS AND SPECIAL PROJECTS: We'll align with like-minded brands to execute partnerships and campaigns that elevate Hilton Head Island among target audiences. These opportunities will be evaluated and explored on an ongoing basis.



MEETINGS & GROUPS SALES

As we enter into 2022-2023, expectations and industry trends are similar to those of 2021-2022, with increased demand for guest rooms and meeting spaces, and an optimistic outlook for a full recovery.

According to Cvent reporting, unique RFP opportunities for meetings and events for Hilton Head Island in 2021 increased 13% over 2019 and 120% over 2020. In regards to what planners want in their venues and destinations, a safe and clean environment leads the way, followed by accessibility/easy-to-get-to venues, and value for the money spent. Within the planning community, they continue to experience the need for the following:

- » Virtual networking
- » Hybrid-ready venues—internet with sufficient bandwidth
- » Staff trained for virtual technology
- » Increase in collaboration
- » Flexible options for participation—capacity to social distance in person or an option to attend virtually

The return of face-to-face meetings should continue to improve as Covid-19 and travel restrictions are lifted. The “lift and shift” trend of rescheduling meetings and events due to the pandemic has begun to move toward “strategize and actualize”, where host venues and meeting planners collaborate, finding solutions to hold successful meetings.

Post-pandemic, Hilton Head Island is positioned to compete for group business with more than \$50 million of hotel renovations, updated conference space, parks and leisure activities, and food and beverage venues. As the destinations Designated Marketing Organization (DMO) we have increased marketing and advertising partnerships with leading industry publications, social media/digital advertising, and media outlets to leverage the island’s brand assets to increase lead generation.

Our presence at industry trade shows continues to reinforce our willingness to partner with our meeting planners and increase visibility to decision-makers.





OUR APPROACH

SOLICITATION ACTIVITIES: 50 PER MONTH

- » Direct solicitation
(phone, e-mail, social media)
- » Sales appointments
(sales calls, trade shows, virtual)
- » Leads sent to properties

INCREASE NUMBER OF DIRECT RFPS AND RFPS SUBMITTED THROUGH WEBSITE

- » 2019: 69 Leads Received
- » 2020: 24 Leads Received
- » 2021: 55 Leads Received
- » 2022: 100 Lead Goal

TOTAL ROOM NIGHTS BOOKED THROUGH VCB

- » 2018: 1,155 TRN
- » 2019: 736 TRN
- » 2020: Covid cancellations
- » 2021: 2,907 TRN *2020 Lift & Shift
re-books in addition to new business
- » 2022: 1,200 Total Definite Room Nights Goal

MAINTAIN AND GROW INDUSTRY PARTNERSHIP IN ORGANIZATIONS AND ADVERTISING

South Carolina Parks, Recreation and Tourism
 South Carolina Sports Alliance
 North Carolina Society of Association Executives
 Georgia Society of Association Executives
 Meeting Planners International
 Society for Incentive Travel Excellence
 Cvent
 HelmsBriscoe
 Meetings Today (Meetings Today magazine + Trade Show)
 Northstar Media (Meetings & Conventions Magazine + Trade Shows)
 Social Media Platform LinkedIn (Organic and paid advertising through the new Hilton Head Island VCB LinkedIn page)

TARGET MARKETS

Charlotte, NC	Jacksonville, SC
Raleigh, NC	Dallas, TX
Atlanta, GA	Chicago, IL
Columbia, SC	

Market segment breakdown Visitor & Convention Bureau RFPs 2019 & 2021*

MARKET SEGMENT 2019	#RFPs	MARKET SEGMENT 2021	#RFPs
CORPORATE	19	Corporate	23
ASSOCIATION	26	Association	13
SMERF	19	SMERF	7
GOVERNMENT	1	Government	2
TOUR GROUP	3	Tour Group	7
INCENTIVE	1	Incentive	1
WEDDING	19	Wedding	2

*Due to COVID-19 we did not host meetings and events.





INTERNATIONAL MARKETING

LANDSCAPE

The long-awaited opening of the border to all vaccinated inbound travelers, which took place on November 8, 2021, is expected to usher in a new period of recovery. Many economies have also recently begun transitioning away from their “zero Covid” strategies. This will allow travelers from key inbound markets to visit again in the short-term. International arrivals are estimated to register at just 27% of pre-pandemic levels in 2021 and spending is estimated at an even lower 22%, as border restrictions impeded arrivals from key international source markets for most of 2021. But strong international travel growth is expected in 2022—led by Canada and Mexico. Nevertheless, despite the recent lifting of border restrictions, international arrivals and spending will take some time to recover. International visitations to the U.S. fell from 79 million in 2019 to just 19 million in 2020 and are projected to total only 52 million (66% of 2019 levels) even in 2022. Full recovery is not anticipated until 2024 or 2025.

Source: U.S. Travel Association Fall Forecast 2021

INTERNATIONAL MARKETING STRATEGY

Our strategy, due to the volatility of the international travel market, will be to continue to monitor the market and keep partnership opportunities ready to activate when the time presents itself. These partnerships include but are not limited to Coastal South Carolina, Brand USA and international trade partners with the focus of increasing international visitation, spend and market share to the destination.

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. We receive many online, as well as phone inquiries, and distribute the planner to elected officials, state Welcome Centers, airports, AAA offices nationwide along with distribution at tradeshow, events and to media. In partnership with the Lowcountry Golf Club Owners Association (LGCOA), we also include their Official Golf Vacation Planner with our planner when requested.

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 AT AIRPORTS

Included in our budget for fulfillment costs is a monthly fee to support brochure distribution at the Savannah/Hilton Head International Airport’s Welcome Center and the Hilton Head Island Airport.



APPENDIX

REPORTS

2021 Tourism Economic Impact Report:

Office of Tourism Analysis, College of Charleston

2021 Digital and Social Media Marketing Recap:

VERB Interactive

2021 Public Relations Year in Review:

Weber Shandwick

2021 Community Sentiment Survey Executive Summary:

MMGY Travel Intelligence

2021 Visitor Profile Study Executive Summary:

Office of Tourism Analysis, College of Charleston





ESTIMATED TOTAL IMPACT OF TOURISM
IN HILTON HEAD ISLAND
ON BEAUFORT COUNTY, SOUTH CAROLINA
2021

MARCH 11, 2022

DANIEL GUTTENTAG, PH.D.
MELINDA PATIENCE



66 GEORGE ST. | CHARLESTON, SC 29424-0001 | OTA.COFC.EDU

Table of Contents

INTRODUCTION..... 1

METHODOLOGY..... 1

RESULTS 2

APPENDIX 4

Introduction

This study estimates the economic impact generated by tourism to the Town of Hilton Head Island in the year 2021. 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. Daniel Guttentag and Melinda Patience of the Office of Tourism Analysis, which is part of the Hospitality and Tourism Management Department in 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., STR and DestiMetrics), combined with visitor behavior data that is collected via a Visitor Profile Survey. The estimated total number of visitors in each segment for 2021 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 2021, 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 (IO) 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 (indirect and induced impacts). The model further estimates labor impacts and tax revenues.

Table 1. Number of HHI Visitors

Segment	Visitors
Villa Rental	962,686
Hotel	508,977
Timeshare	481,934
Second Homeowner	719,302
Non-Paying Guests	186,667
Day Trip	267,290
Total Visitors	3,126,856

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. 2021 Estimated Total Spend by Spending Category

Category	Totals
Transportation (around the destination)	\$118,036,862
Lodging	\$789,416,087
Food – Dining Out	\$413,711,729
Food – Groceries	\$173,757,632
Shopping	\$222,969,080
Spas	\$36,774,965
Golf	\$73,878,603
Biking	\$34,922,859
Performance/Visual Arts	\$19,412,371
Festivals	\$15,653,261
Museums/Historical Tours	\$28,447,904
Boating/Sailing/Fishing	\$53,116,069
Nature-based Activities	\$18,579,413
Dolphin Tours	\$24,130,236
Tennis	\$11,763,489
Other Expenses	\$49,564,068
Total Expenditure	\$2,084,134,629

- **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

Compared to 2020, which was wholly defined by the COVID-19 pandemic, the year 2021 marked a significant shift back towards normalcy for the hospitality and tourism sector, and for society more broadly. This shift closely paralleled the rollout of widespread public vaccination early in the year. Nevertheless, the ongoing pandemic continued to influence travel behavior, with the rebound in tourism led by leisure travelers, who were largely attracted to non-urban destinations with opportunities for

Impact of Tourism in HHI on Beaufort County, 2021

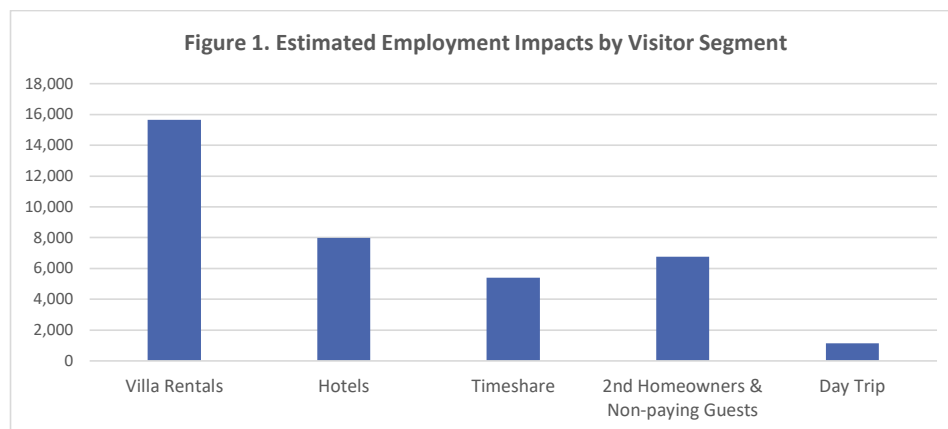
outdoor recreation. Such trends were favorable for Hilton Head Island, which was able to attract a record-breaking number of visitors.

A total of **3.13 million visitors** came to Hilton Head Island in 2021, up 19.9% compared to 2020 and up 16.5% compared to 2019. The overall economic impact of this tourism for Beaufort County was **\$2.80 billion**, up 103.7% compared to 2020 and up 85.2% 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 **36,919 jobs**, which represent 34.1% 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 **1.34**. This signifies that every dollar spent by tourists on Hilton Head Island increased output in the overall Beaufort County economy by a total of \$1.34.

The tourist expenditures generated an estimated **\$29.53 million** in tax revenues for local Beaufort County governments. The Town of Hilton Head Island earned an additional **\$39.64 million** in accommodations tax, hospitality tax, and beach preservation fees, as reported by the Town of Hilton Head Island Revenue Services. Together, this **\$69.17 million** in tax revenue represents a Return on Tax Investment (ROTI) of 38.01, based on the \$1.82 million that was spent on destination marketing in 2021. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **\$38.01** in local tax revenue.



Appendix

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

	Employment	Labor Income	Output
Direct	12,605	\$356,054,411	\$837,915,772
Indirect	1,524	\$65,306,260	\$215,770,628
Induced	1,513	\$60,694,186	\$207,048,153
Total	15,641	\$482,054,857	\$1,260,734,553

Table A2. Hotel – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	6,495	\$144,752,275	\$402,067,778
Indirect	830	\$35,385,351	\$124,323,097
Induced	647	\$25,963,907	\$88,568,232
Total	7,973	\$206,101,532	\$614,959,107

Table A3. Timeshare – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	4,391	\$109,058,827	\$263,016,843
Indirect	532	\$22,563,787	\$79,182,588
Induced	472	\$18,933,404	\$64,587,907
Total	5,395	\$150,556,019	\$406,787,338

Impact of Tourism in HHI on Beaufort County, 2021

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

	Employment	Labor Income	Output
Direct	5,589	\$110,389,574	\$275,255,540
Indirect	670	\$27,741,691	\$104,773,740
Induced	495	\$19,856,784	\$67,735,333
Total	6,754	\$157,988,049	\$447,764,613

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

	Employment	Labor Income	Output
Direct	971	\$18,918,457	\$41,632,528
Indirect	101	\$4,132,010	\$15,698,167
Induced	84	\$3,352,104	\$11,433,305
Total	1,156	\$26,402,571	\$68,763,999

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

	Employment	Labor Income	Output
Direct	30,051	\$739,173,544	\$1,819,888,461
Indirect	3,657	\$155,129,098	\$539,748,220
Induced	3,211	\$128,800,386	\$439,372,930
Total	36,919	\$1,023,103,028	\$2,799,009,611
Estimated Local Tax Revenue			\$29,534,406
Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)			\$39,644,871
Total Estimated Local Tax Revenue			\$69,179,277

Table A7. Top 50 Industries Impacted by HHI Tourism

	Industry	Output
1	Non-hotel accommodations	\$633,231,853
2	Full-service restaurants	\$435,199,453
3	Hotels and motels, including casino hotels	\$156,220,079
4	Other real estate	\$154,688,231
5	Miscellaneous store retailers	\$128,227,864
6	Fitness and recreational sports centers	\$122,471,805
7	Transit and ground passenger transportation	\$118,565,382
8	Owner-occupied dwellings	\$71,371,460
9	Food and beverage stores	\$67,897,954
10	Water transportation	\$53,628,381
11	Museums, historical sites, zoos, and parks	\$47,254,094
12	Management of companies and enterprises	\$46,953,174
13	Personal care services	\$39,151,567
14	Scenic and sightseeing transportation and support activities for transportation	\$37,884,118
15	Monetary authorities and depository credit intermediation	\$28,979,733
16	All other food and drinking places	\$28,939,460
17	Electric power transmission and distribution	\$21,795,792
18	Insurance agencies, brokerages, and related activities	\$21,597,106
19	Offices of physicians	\$21,465,194
20	Other amusement and recreation industries	\$20,302,286
21	Performing arts companies	\$19,510,623
22	Other local government enterprises	\$19,135,009
23	Services to buildings	\$18,544,909
24	Limited-service restaurants	\$18,019,640
25	Legal services	\$17,847,050
26	Maintenance and repair construction of nonresidential structures	\$16,551,900
27	Hospitals	\$14,705,175
28	Employment services	\$14,381,081
29	Other financial investment activities	\$13,063,864
30	Management consulting services	\$12,338,119
31	Securities and commodity contracts intermediation and brokerage	\$11,861,162
32	Advertising, public relations, and related services	\$10,893,553
33	General merchandise stores	\$10,369,992
34	Non-depository credit intermediation and related activities	\$9,961,576
35	Postal service	\$9,865,494
36	Accounting, tax preparation, bookkeeping, and payroll services	\$9,804,885
37	Tenant-occupied housing	\$9,675,986
38	Waste management and remediation services	\$9,662,874
39	Automotive repair and maintenance, except car washes	\$9,534,069
40	Landscape and horticultural services	\$9,408,689

Impact of Tourism in HHI on Beaufort County, 2021

	Industry	Output
41	Fossil fuel	\$9,252,322
42	Non-store retailers	\$8,678,487
43	Radio and television broadcasting	\$8,203,622
44	Nursing and community care facilities	\$6,583,933
45	Car washes	\$6,440,816
46	Clothing and clothing accessories stores	\$6,071,317
47	Building material and garden equipment and supplies stores	\$6,014,177
48	Other durable goods merchant wholesalers	\$5,865,529
49	Motor vehicle and parts dealers	\$5,783,823
50	Offices of dentists	\$5,709,387

**2021 DIGITAL AND SOCIAL
MEDIA MARKETING RECAP:**

VERB INTERACTIVE

HILTON HEAD ISLAND GOLF

CONVERSION RATE OVERVIEW

- In 2021, the HHIG Golf conversion rate decreased by 9.8% compared to the PY.
- 96% of conversions were Outgoing Partner Links.



HILTON HEAD ISLAND GOLF

GOOGLE PAID METRICS

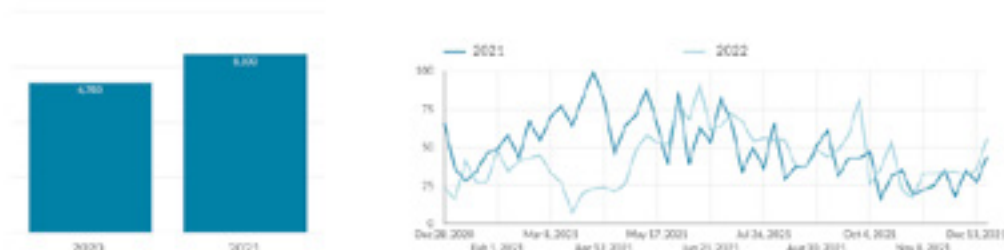
- From 2020 to 2021 the cost per click increased slightly to \$1.1. The overall ad spend was decreased by 36% YoY, but despite lower spend, overall conversions were up 11%, indicating strong optimizations towards a qualified audience.
- 43K sessions occurred on the golf pages from Google Ads in 2021, with April as the top-month for traffic.



HILTON HEAD ISLAND GOLF

SEARCH INTEREST

- In 2021, Search interest for Hilton Head golf courses was up 16% vs PY.
- Outside of South Carolina, two of the top Brand Interest markets were consistent with PY: North Carolina and Georgia, were the top search markets consistent with trends from 2020. Tennessee has replaced Ohio as the third-highest market by search interest.
- Top terms used to search for Hilton Head Island Golf were hilton head golf courses, hilton head golf, hilton head golf packages, hilton head island golf tournament, hilton head, harbour town golf links, public golf courses on hilton head island, and private golf courses on hilton head island.



HILTON HEAD ISLAND PROPER

GOOGLE PAID METRICS

- The spend for 2021 was increased by 55% in 2021, contributing to 40% more conversions vs 2020.
- Traffic from Google Ads to site spiked in Q1 of 2021, resulting in 75% more sessions than 2020.



256K Conversions
(Up +40% vs 2020)

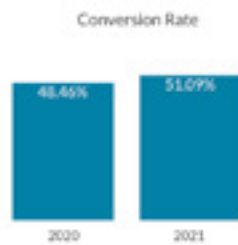
\$3.26 Cost/Conv
(Up +9% vs 2020)



HILTON HEAD ISLAND PROPER

CONVERSION RATE OVERVIEW

- HHII drove 1.7M conversions, up +44% vs the PY. The conversion rate increased slightly, to 51.09%.
- The majority of conversions are outgoing links to partners. Golf accounts for 8% of conversions. Form Submits and Click to Call actions drove 1%.



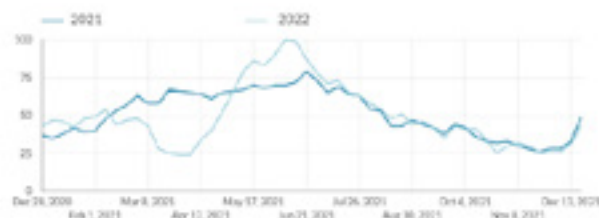
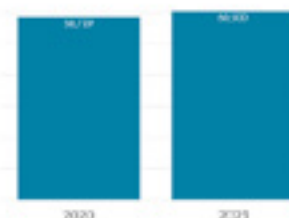
Conversion Breakdown



HILTON HEAD ISLAND PROPER

SEARCH INTEREST

- In 2021, Search volume increased 2.9% vs PY. Demand spiked in May through to July of 2021.
- Outside of South Carolina, three of the top brand interest markets are consistent with PY: Georgia, North Carolina, and West Virginia were the top search markets consistent with trends in 2020. Ohio replaced Tennessee as the fourth-highest search interest market outside of South Carolina.
- Top terms used to search for Hilton Head Island were hilton head, hilton head island, duneside island, hilton head south carolina, hilton head sc, hilton head resorts, hilton head golf courses, things to do in hilton head, hilton head island weather, and hilton head island hotels.



HILTON HEAD ISLAND PROPER

DMA's

- In 2021, the top 10 DMA traffic remained fairly steady compared to the PY. The top 10 DMA's drive 70% of all traffic to the website. Texas had the top growth 76%, with 82% vs PY.

Top 10 Markets

2021 2020

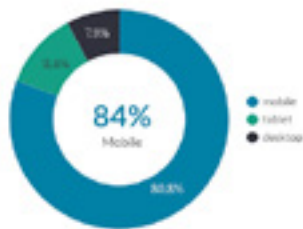


Hilton Head Island

Social Traffic

Device

What device are they using?



Traffic Source

What Social Network are they coming from?



- Facebook is the key driver for the majority of the social traffic to the website, accounting for +87% of the social visitors.
- Pinterest outperformed Instagram in driving traffic to the website, but Instagram saw the most year-over-year growth with the addition of paid ads boosting on posts. While Instagram drives less traffic, the platform remains the most successful in increasing brand awareness reflected in impressions and reach of posts. Where are people visiting our website from Social Media?

HILTON HEAD ISLAND PROPER

PAGE PERFORMANCE

- Other than the homepage, the Hilton Head Island Escapes Offers page is the most popular page for users to visit. After the Escapes page, See & Do page also attracts a lot of engagement from our audience.

Top Pages

	Page	Pageviews +	Avg. Time on Page	Bounce Rate
1.	/	411,080	00:01:34	55.67%
2.	/offer/hilton-head-island-escapes	343,843	00:04:37	45.47%
3.	/see-do	417,491	00:01:28	54.58%
4.	/about-hilton-head-island	347,391	00:03:24	22.81%
5.	/events	143,585	00:01:35	40.56%
6.	/zoo	130,887	00:08:40	15.41%
7.	/accommodation/houses-villas	128,524	00:04:48	56.96%
8.	/offer	113,249	00:08:57	45.84%
9.	/see-do/beaches	97,783	00:02:37	40.64%
10.	/about-destination-events	93,047	00:04:31	20.41%

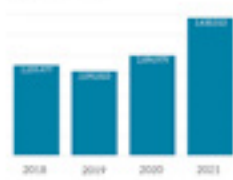


HILTON HEAD ISLAND PROPER

TOTAL WEBSITE VISITATION

- In 2021, there were 3,481 visits to the hiltonheadisland.org website. Search traffic (organic and paid) contributed a major share of traffic to the website (66%). Traffic to the website increased 37.49% vs. 2020.
- 62.3% of users navigated to the site from a mobile device, followed by 27.3% on desktop.

Website Visits



Visitors by Channel



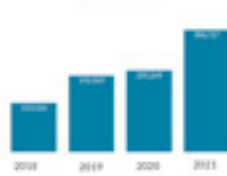
HILTON HEAD ISLAND
Real Estate

HILTON HEAD ISLAND GOLF

TOTAL WEBSITE VISITATION

- In 2021, there were 306K visits to the golf website, an increase of 41.42% vs the previous year. The growth in traffic was primarily driven by paid display campaigns, social referrals, and organic search interest.
- The golf site saw an increase in mobile sessions of 17% compared to the PC, and an increase in desktop sessions of 17% compared to the PC.
- A combination of display and paid search traffic drove 66.2% of all traffic. Users are spending, on average, 5 seconds more time on the page in comparison to last year with a lower bounce rate indicating a higher level of quality traffic viewing the page.

Website Visits



Visitors by Channel



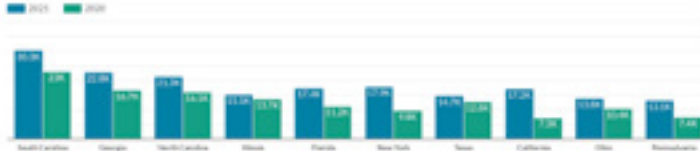
HILTON HEAD ISLAND
Real Estate

HILTON HEAD ISLAND GOLF

DMAs

- The top 10 DMA traffic increased 49% compared to the PC. The top 10 DMAs drove 60% of all traffic to the website in 2021. California and New York drove the largest increases.

Top 10 Markets



HILTON HEAD ISLAND
Real Estate

HILTON HEAD ISLAND PROPER

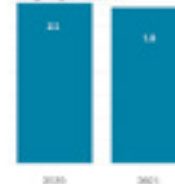
KEY ENGAGEMENT METRICS

- In 2021, there was a 48% bounce rate, down 18% compared to 2020.
- Users viewed an average of 1.8 pages on the hiltonheadisland.org website, down 18% compared to the previous year.

Bounce Rate



Avg. Pages / Session



HILTON HEAD ISLAND
Real Estate

**2021 PUBLIC RELATIONS
YEAR IN REVIEW:**

WEBER SHANDWICK

HILTON HEAD ISLAND 2021 COVERAGE HIGHLIGHTS

COVERAGE HIGHLIGHTS

The New York Times

A Different Early-Bird Special: Have Vaccine, Will Travel

Alice Southworth, 75, was also looking for a post-vaccine travel destination in a place that was still taking Covid-19 precautions seriously, and didn't push her too far out of her comfort zone. A retired psychologist, she has continued to see a handful of patients throughout the pandemic, but hasn't ventured beyond her hometown of McLean, Va., in more than a year. She also hasn't been able to use an indoor gym or attend her beloved water aerobics classes, so as soon as she received the first dose of the vaccine, she booked a visit to Hilton Head Health, a wellness resort in South Carolina, where she'll have access to a full range of fitness classes and activities. And when she arrives on March 28, she'll be fully vaccinated.

Receiving that coveted first shot, she said, wasn't just a factor in convincing her to book the trip. "It was the whole of the decision," she said. But even having been immunized, she knows the vaccine is not a magic bullet, and wanted to be sure she was selecting a vacation spot where she trusted sanitation measures and where social distancing would still be possible.

"Hilton Head is a good investment in my own health," she said, "and it's a place where I feel I will be safe enough. I'm not going to Rome, you know."

Condé Nast Traveler

9 Unforgettable Family Vacation Ideas



Kids will love a good, fast car get going quickly for the adults trying to keep them from wandering. We took you just one step to Hilton Head, in South Carolina's Lowcountry area near the town of Beaufort. Georgia, or Hilton Head to north of Beaufort, the *Maritime Park* is a sprawling resort on the Mar. River with a main line, dozens of cottages, two villages, a nature preserve, walking and biking trails, water, restaurants, and Jack Nicklaus designed golf course. Translation: This really is good.

The kids love the fact that they can get going quickly for the adults trying to keep them from wandering. We took you just one step to Hilton Head, in South Carolina's Lowcountry area near the town of Beaufort. Georgia, or Hilton Head to north of Beaufort, the *Maritime Park* is a sprawling resort on the Mar. River with a main line, dozens of cottages, two villages, a nature preserve, walking and biking trails, water, restaurants, and Jack Nicklaus designed golf course. Translation: This really is good.

PureWow 10 Island Vacations You Can Take Without Leaving the Country

7. HILTON HEAD, SC

Hilton Head is a magical destination for getting the most out of your island time. The difference between a quiet and a lively beach is just a short drive. The ocean is always within reach, and the island is always within reach. The island is always within reach, and the ocean is always within reach. The island is always within reach, and the ocean is always within reach.



When to stay:

- Jan to Feb: a quieter time to visit
- Feb to Mar: a quieter time to visit
- Mar to Apr: a quieter time to visit

6 Travel Deals to Book Over Memorial Day Weekend



Beachfront: If you want some time to relax, Hilton Head's "Summer of Travel" sale runs through June 30 and lets you save on hotel stays booked through September 1. How much you save depends on how long you stay—three night stays are 15 percent off, four night stays are 20 percent off, and stays of five nights or more are 30 percent off. To cash in on the deal, use code **SAVE30**. Hilton Head properties all across the country, but we're partial to the **Beachfront Resort**, **Hilton Head Island**, with its 11 acres of tropical gardens and great views with ocean views, and the **Club Dorland Oceanfront Hotel**, located two blocks from Ocean Square and filled with Philippe Starck furniture.

THRILLIST Kick Off Your Summer With These 10 Travel Ideas

Hang out in South Carolina
When you're all full up on BBQ in Bluffton, why not stick around the Carolina coast for a few lazy lowcountry beach days of golfing at **Hilton Head**, surfing at **Jolly Beach**, or just doing straight up nothing at Pawleys Island (one of our **favorite**)? Or head up to **Myrtle Beach**, where from June 10th to 13th, you can catch acts like Luke Combs and Dierks Bentley at the seaside **Carolina Country Music Fest**. Alternatively, clear across the state, go see for yourself whether the booming **beer** and food scene in **Greenville** lives up to the hype




USA TODAY 4 beach towns to hit this fall once the crowds are gone: Carolinas, California, Oregon

Beach towns offer a laid-back vibe, cool ocean breezes, fun family activities and many have amazing beach scenery. Plus, you can enjoy virtually uninterrupted fun and beauty in beach life.

The problem: Everyone else has the same idea in summer, leading to peak prices and crowds.

For a more relaxed experience and with fewer crowds, consider planning a getaway for September or early October. Once the summer crowd disperses, hotel and vacation rental prices drop. But you can still enjoy pleasant weather with less competition for a spot on the beach.

Here are four American beach towns to consider after the summer vacation disperses.



Bluffton, South Carolina

A quintessential lowcountry town, Bluffton is located along the May River and has charming views of two beautiful family-friendly beaches and a coast. Best time to visit is from late October to early November. Bluffton is only an hour's drive from Greenville, Raleigh, and a short 10-minute drive to Hilton Head Island.

During September and October crowds wane and so does the weather heat. After Labor Day, enjoy water-based activities without the summer high temperatures. Enjoy paddleboarding, fishing, kayaking, or plan a boat ride to the beaches of **Daufuske Island**. As fall foliage begins to emerge, visitors can hike through the town's many Spanish moss-lined trails to find peace.

BRIDES How to Get a Marriage License in South Carolina



From historic Charleston to the Grand Strand, Hilton Head Island, Upstate, and beyond, South Carolina has some incredibly special wedding venues. And whether you're a resident of the state or visiting through the planning details of what's sure to be your lovely destination wedding, you cannot put off getting your South Carolina marriage license, which requires understanding the timing and nuances of obtaining this legal document.

Of course, we know, it's not necessarily every couple's favorite item on the lengthy to-do list of what it takes to get married—but it's essential, nonetheless. And finally, as long as you don't wait until the last minute to get this process started, it's all going to be just fine.

MEET THE EXPERT

Kim Nelson is the sales manager and wedding concierge at Hilton Head Island, **Volley & Corporation Bureau**. She has assisted hundreds of couples planning to wed at Hilton Head Island.

ShermansTravel Best Luxury Resorts in Every U.S. State



South Carolina

In the heart of the low country, the **Lowcountry Escape** is dripping with Spanish moss and southern hospitality. Guests can choose from a variety of accommodations, from rooms and suites to entire homes and cottages. For fun, and one of the possible activities, enjoy aboard a restored 1913 yacht, or hire for a shaded spot for a Champagne picnic packed by the resort.



America's Most Family-Friendly Vacation Destinations



6. Hilton Head Island, South Carolina

Located in South Carolina Lowcountry, the award-winning Hilton Head Island offers visitors ideal weather, average annual temperatures of 57-74 degrees, and affordable accommodations (\$170 per night on average) as well as a plethora of family-friendly activities, including beaches, boating, fishing, golf adventures, guided tours, scenic bike rides and much more.



Seductive oyster and beverage pairings that will make you swoon

Oysters and a martini

Oysters can sometimes be a sophisticated food. Why not bring that oyster off the plate and add its flavors into the cocktail glass. At Hilton Head's **Hudson's on the Dock's**, it offers a lowcountry Dirty Martini.

While a dirty martini usually gets it flavor from olives, this cocktail uses oyster liquor to add that briny note. Here's how to make one at home:

- Dash of oyster liquor
- 1/2 ounce dry vermouth
- 2 1/2 ounces of Ketel One vodka
- Garnish with 3 olives and splash of salmon roe



The Best Beach Hacks Recommended to Us by Experts



Take a sunrise walk

Haley Davis from Hilton Head's new Beach Ambassador Program tends to opt for spending time by the ocean when it's a little less crowded. "I like to encourage visitors to take a sunrise walk on the beach," she said. "The views are pristine and if you're lucky, you'll see the fresh tracks of a mother turtle who has come back to the island to lay her eggs."

Reader's Digest

50 Mini Vacations That Won't Break the Bank



Hilton Head, South Carolina

Why you'll love it: With everything from sun-soaked beaches to culinary hidden gems to miles and miles of golf courses on 30 different greens, Hilton Head Island offers the perfect backdrop for those looking for a safe domestic beach adventure and an [affordable beach vacation](#).

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

Where to stay: Perched on Hilton Head Island's iconic white sand beaches and framed by sweeping palmetto trees, beachfront Hilton Head Island Resort & Spa offers travelers a true Lowcountry oasis. With private access to a 12-mile swath of pristine beaches and an array of outdoor resort pools and amenities, the hotel feels like a tropical island vacation, but one you can drive to. Don't forget to browse through the best [affordable family resorts](#) before booking your next vacation.

REAL SIMPLE



WILSON ADAMS, VISITOR EXPERIENCE

AT LAST! SUNNY BEACH

The warm sun and gentle waves of the ocean are what make a beach vacation so appealing. But if you're looking for a beach vacation that's also budget-friendly, you'll want to consider Hilton Head Island. With its beautiful beaches, world-class golf courses, and a variety of activities, Hilton Head Island is the perfect destination for a family vacation. And the best part? It's all within reach. Hilton Head Island is just 100 miles from the mainland, making it easy to get to. And with its beautiful beaches and world-class golf courses, it's a destination that's sure to please everyone. So why not make Hilton Head Island your next beach vacation destination?



ANDY FINE, TRAVELER

Being a traveler, you know that a beach vacation is a must. But if you're looking for a beach vacation that's also budget-friendly, you'll want to consider Hilton Head Island. With its beautiful beaches, world-class golf courses, and a variety of activities, Hilton Head Island is the perfect destination for a family vacation. And the best part? It's all within reach. Hilton Head Island is just 100 miles from the mainland, making it easy to get to. And with its beautiful beaches and world-class golf courses, it's a destination that's sure to please everyone. So why not make Hilton Head Island your next beach vacation destination?

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M

THE MANUAL

How to Make an Eggnog and Mix into 6 Cocktail Recipes

Low Country Snow Globe



City Lucky Pioneers @Kochon + J&J, Hilton Head, South Carolina

A magical orb of snow in a glass, this drink looks like a snow globe and tastes like heaven. You get the perfect fun of drinking a cocktail and the green up look, all at once.

Ingredients:

- 2 ounces foreign & domestic fast forward spirit whiskey
- 2 ounces eggnog
- 1 ounce nutmeg
- 1 ounce red and green nutmeg for garnish

Method:

1. Stir together spirit whiskey and eggnog until garnish with green nutmeg.

Forbes

5 Best Outdoor Romantic Getaways For Couples In The U.S.



Visit South Carolina's Island with No Bridge

Remote and a bit off-the-grid, [Daufkin Island](#) in South Carolina is home to less than 400 people. You'll have to take a ferry to get there, which is not only part of the fun, but also, the extra effort sort of weeds out less intrepid travelers, giving you the peace and tranquility of a secluded vacation. Once you arrive at [Big Point](#), just off the coast of Seaside and Hilton Head, you'll explore on foot, bicycle, or via golf cart—there are no private cars on the island.

MEN'S JOURNAL

Best Fall Trip Ideas to Avoid Big Crowds



Hilton Head Island, South Carolina

Temperate weather remains, summer crowds do not. Here on Hilton Head, your wallet will enjoy a bit on hotel rates and vacation rentals with plenty of summer's fun in full swing. First, pumped over the [miles of bike trails](#), under the omnipresent aura of live oak trees covered in Spanish moss, or opt for a sunrise spin on the hard-packed sand beaches. Then, journey through the [Harbour Town Marina](#) known for its candy-striped lighthouse for a meal or some shopping. From here, slip into your comfy bed at the [Sea Pines Resort](#), which has [three golf courses](#) when you're ready for tee time.

Eat This, Not That!

The Cheapest Eats in Every State

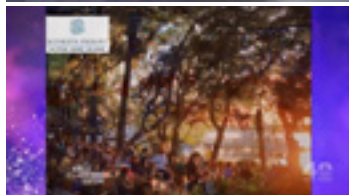
If you're tired of the same old boring hamburger, here are the spots to seek out.

SOUTH CAROLINA: Bullie's BBQ on Hilton Head Island



Carolina-style pulled pork is a must when traveling through South Carolina. At [Bullie's BBQ](#) in Hilton Head, you'll be treated to succulent pulled pork with a tangy vinegar-based Carolina sauce for \$8.00. Add on a side of fries and jalapeño cornbread for the full bbq experience.

THE KELLY CLARKSON SHOW



7 Incredible Golf Courses in the USA Worth Building a Whole Vacation Around



Atlantic Dunes by Davis Love III – Hilton Head Island, South Carolina

South Carolina's Hilton Head Island is known for its beachfront hotels and stunning golf courses, one of the most impressive of which is [Sea Pines Resort's Atlantic Dunes course](#). A complete reconstruction of the very first course built on Hilton Head, Atlantic Dunes is loaded with hidden bunkers and water hazards, making it challenging yet still playable for novice golfers. The Sea Pines resort has other courses as well: [The Harbour Town Golf Links](#) and [Honey Point by Pete Dye](#), making it one of the top destinations in the country for golf vacations.



Delicious Destinations: Hilton Head Island, South Carolina



Best Restaurant for Families: Bullies BBQ

You simply cannot have a trip to South Carolina without having authentic Carolina-style BBQ, and at Hilton Head Island that means heading to [Bullies BBQ](#). The bbq joint is typically very busy at lunch and dinner-to-go orders can be seen piled up at the bar. One of the best ways to enjoy Bullies is to order ahead and get dinner to go, then eat it in your hotel room on the day you arrive or after a long day at the beach. The restaurant is turning out competition-level pulled pork, brisket and ribs, all of which should be doused in the signature Carolina vinegar sauce.



All In The Family

Meeting Planners Seeking More Family Friendly Venues



Also, with many still concerned for their family's safety with COVID-19 numbers fluctuating, finding spaces that have safety protocols in place is highly sought out when planning family friendly meetings today. Nikki Padgett, the South Carolina Association of Counties director of administrative services, recently held the association's 54th Annual Conference on family-friendly Hilton Head Island. The island offers everything from dolphin spotting during a sunset cruise to getting up close and personal with reptiles and amphibians at the Coastal Discovery Museum. "Our conference is always around the time where kids are about to return to school, so we want to ensure that our participants can make up the final days of summer vacation together with their families," she says. "We found that Hilton Head Island is the perfect venue to host families, as the island also has 10 miles of pristine coastline in addition to offering a variety of activities from tennis, biking and golfing."

Forbes

Best Of The Best: Tripadvisor's Popular, Trending And Emerging Destinations For 2021

While many of us are still pondering what to do, [TripAdvisor](#)[®], the world's largest travel platform, just released its annual Travelers' Choice[®] Best of the Best awards for Destinations, highlighting the Popular, Trending, and Emerging Destinations around the world, as well as a new category for 2021: National Parks.

The awards are based on the quality and quantity of reviews and ratings for accommodations, restaurants, and things to do in destinations worldwide on TripAdvisor over a 12-month period. They reveal where travelers continued to roam, while travel was still open, as well as where they discussed going while the pandemic kept them stuck at home.

- 15. [Hilton Head, S.C.](#)
- 26. [Good for: sports enthusiasts, nature lovers, playing golf](#)

THRILLIST

11 Private Islands You Should Convince Your Friends to Rent on Airbnb



The Private Islands of Old House Cay
Hilton Head Island, South Carolina
Rate: \$494/night

Why get one private island when you can have three? Surrounded by lily white palm trees, this rental just 10 minutes from Hilton Head puts a brand new (read: way more private) twist on a classic Lowcountry getaway. Accessible only by boat (the hosts are happy to shuttle you to and from the mainland), spend your days here fishing and birdwatching by the docks, catching the sunset from the watchtower, relaxing by the fire pit, and enjoying a moment off the grid.

Parade

67+ Family Beach Vacations for 2021 to Safely Get Away From It All

55. Hilton Head, South Carolina

The [Westin Hilton Head Island Resort & Spa in Hilton Head, South Carolina](#) is family-friendly and located just off the ocean. They're offering a 2021 Spring Break Package (three-night minimum) that includes Heritage Suite accommodations with a connecting room, daily breakfast for four, complimentary 24-hour bike and one-day cabana rentals, 10% off at resort stores and spas and a complimentary private freight and e-movers for one evening, as well as a personal experience [passport](#) to make the most of your trip. The Westin has private access to 12 miles of beaches, four on-site restaurants, three swimming pools and access to golfing. Packages start at \$1,200 for four guests.

2021 RESULTS

*Results represent 2021 calendar year mentions

PRINT/ONLINE

1,919 MENTIONS

13,173,797,457 IMPRESSIONS

\$6,194,564.10 AD VALUE

BROADCAST

397 MENTIONS

95,908,928 IMPRESSIONS

\$5,535,261.00 AD VALUE

TOTAL

2,316 MENTIONS

13,269,706,385 IMPRESSIONS

\$11,729,825.10 AD VALUE



**2021 COMMUNITY SENTIMENT
SURVEY EXECUTIVE SUMMARY:**

MMGY TRAVEL INTELLIGENCE

COMMUNITY PERSPECTIVES

RESIDENT SENTIMENT STUDY

JULY 2021



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



Travel Intelligence

SURVEY METHODOLOGY



Travel Intelligence

SURVEY METHODOLOGY

- MMGY Travel Intelligence conducted an online survey of 2,979 Hilton Head Island residents
- Residents were invited to complete the online survey through the Hilton Head Island website, social media sites, and email outreach.
- The survey was fielded June 14, 2021 – June 25, 2021. 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.



- 9 -

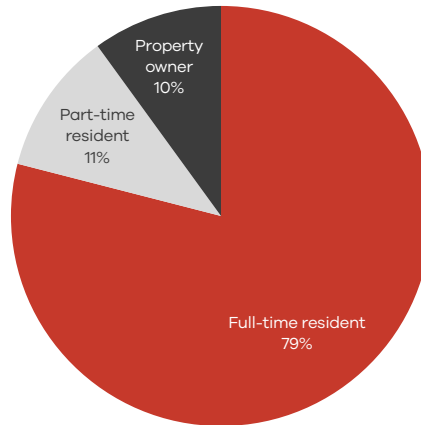
This sample size yields an error range of +/- 1.7 percentage points at the 95% level of confidence. This means that if the survey was to be replicated 100 times, we would expect the results to vary by no more than 1.7 percentage points 95 of those times.

RESPONDENT DEMOGRAPHICS



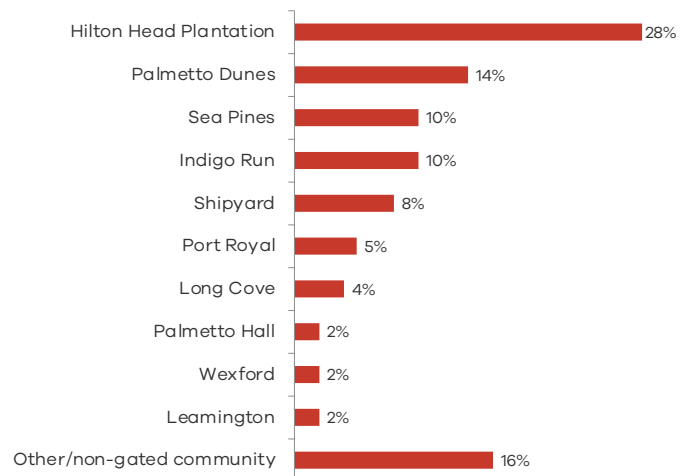
DEMOGRAPHICS

Type of Residency/Ownership on Hilton Head Island



DEMOGRAPHICS

Hilton Head Communities

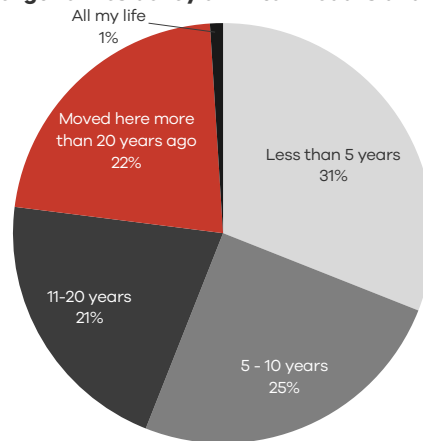


DEMOGRAPHICS

Total Respondents	
Zip Codes	
29926	1351
29928	1287
29910	24
29909	7
29925	6
30350	6
29588	5

DEMOGRAPHICS

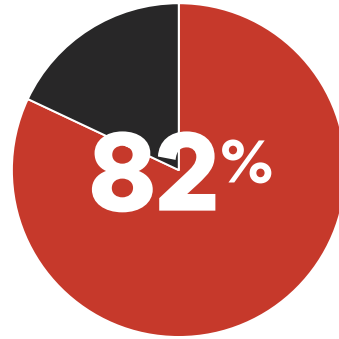
Length of Residency on Hilton Head Island



DEMOGRAPHICS



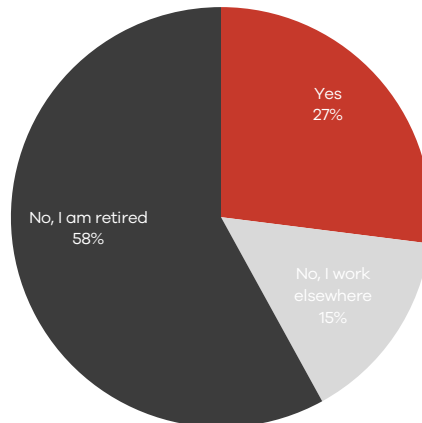
% OF RESIDENTS WHO WERE VISITORS BEFORE MOVING TO/PURCHASING PROPERTY ON HILTON HEAD ISLAND



Were you a visitor before you moved to/purchased property on Hilton Head Island?

DEMOGRAPHICS

Do you currently work on Hilton Head Island?



DEMOGRAPHICS

	Total Respondents
Gender	
Female	58%
Male	42%
Self-identify	0%
Household Income	
Less than \$30,000	0%
\$30,000 - \$49,999	3%
\$50,000 - \$99,999	12%
\$100,000 - \$149,999	16%
\$150,000 - \$249,999	19%
\$250,000 or more	20%
Prefer not to answer	30%



- 11 -

Please indicate your gender.
In which of the following intervals does your annual household income fall?

DEMOGRAPHICS

	Total Respondents
Level of Education	
Less than 4 years of high school	0%
4 years of high school	4%
1-3 years of college	13%
4 years of college	39%
Graduate school or more	43%
Children under 18 in household	11%



- 12 -

What is the highest level of education you completed?
Do you currently have children 18 years of age or under living in your household?

KEY INSIGHT #1

 Travel Intelligence

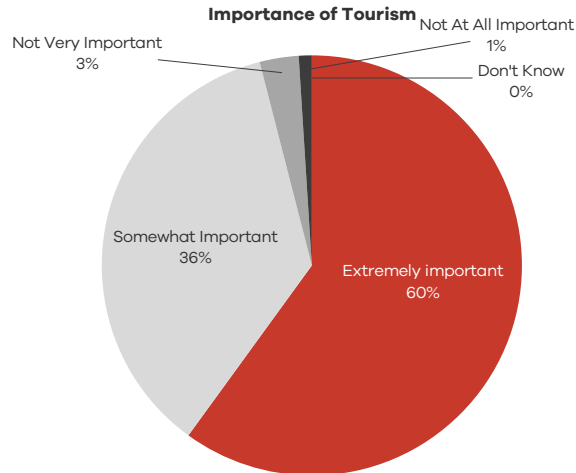
Residents largely consider tourism important to Hilton Head Island's local economy, but many also feel it has a negative impact on their lives, especially during Summer.

KEY INSIGHT #1

 Travel Intelligence

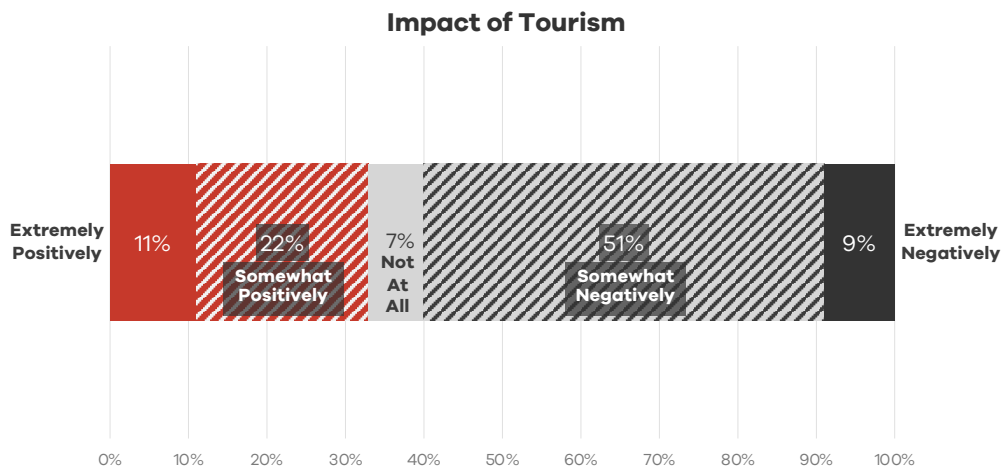
KEY INSIGHT #1

Six in ten residents believe tourism is extremely important to Hilton Head Island's local economy, while only 4 percent believe it is not very important or not important at all.



KEY INSIGHT #1

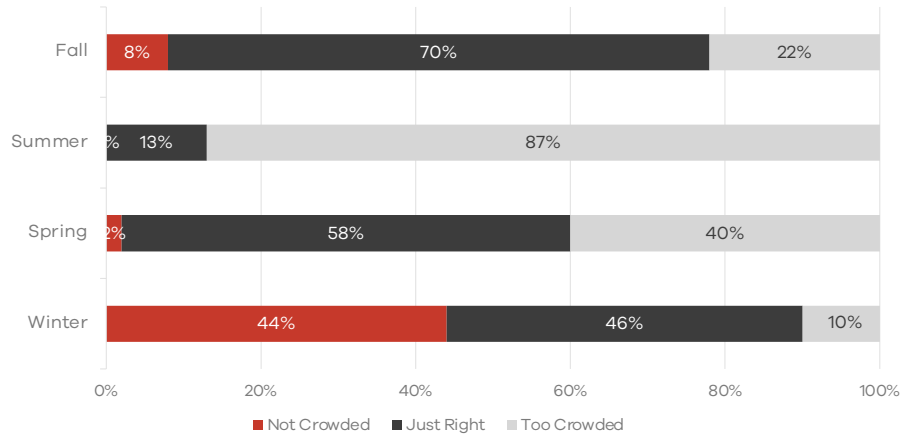
One-third of residents feel that tourism impacts their life at least somewhat positively, while six in ten feel it has at least a somewhat negative impact.



KEY INSIGHT #1

Summer is considered to be “too crowded” by nine in ten residents, while seven in ten feel Fall is “just right” and six in ten feel Spring is “just right”. Winter is the considered both “just right” and “not crowded” by more than four in ten residents.

Seasonal Perceptions

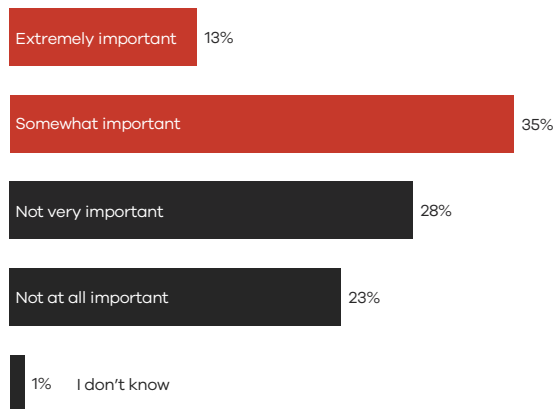


- 17 -

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

KEY INSIGHT #1

IMPORTANCE OF ATTRACTING VISITORS TO HILTON HEAD ISLAND DURING TIMES OF YEAR WITH LOW VISITATION



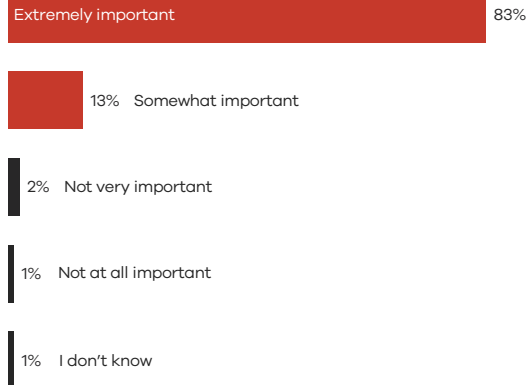
Please indicate how important you believe it is to attract visitors to Hilton Head Island during times of the year that usually have lower visitation (November–April).



KEY INSIGHT #1



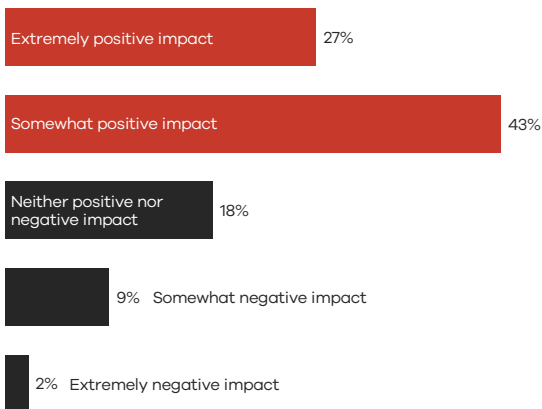
IMPORTANCE OF HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE EDUCATING VISITORS HOW TO RESPECT THE LOCAL ENVIRONMENT AND NATURAL RESOURCES WHEN VISITING



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?

KEY INSIGHT #1

TYPE OF IMPACT HOSTING MARQUEE EVENTS AND FESTIVALS HAS ON RESIDENTS AND VISITORS



One of the Hilton Head Island-Bluffton Chamber of Commerce's objectives is to promote marquee events and festivals. Please indicate the type of impact you believe these activities have on the quality of life for local residents and visitors.

 Travel Intelligence



KEY INSIGHT #1

	Total Respondents
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%
I support efforts by our town in the funding and installation of local public art, exhibits, and cultural attractions	67%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in promoting attractions, festivals, exhibits and similar on Hilton Head Island	57%
I support efforts by the Hilton Head Island–Bluffton Chamber of Commerce in branding and marketing Hilton Head Island for tourism	47%



- 21 -

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

KEY INSIGHT #2



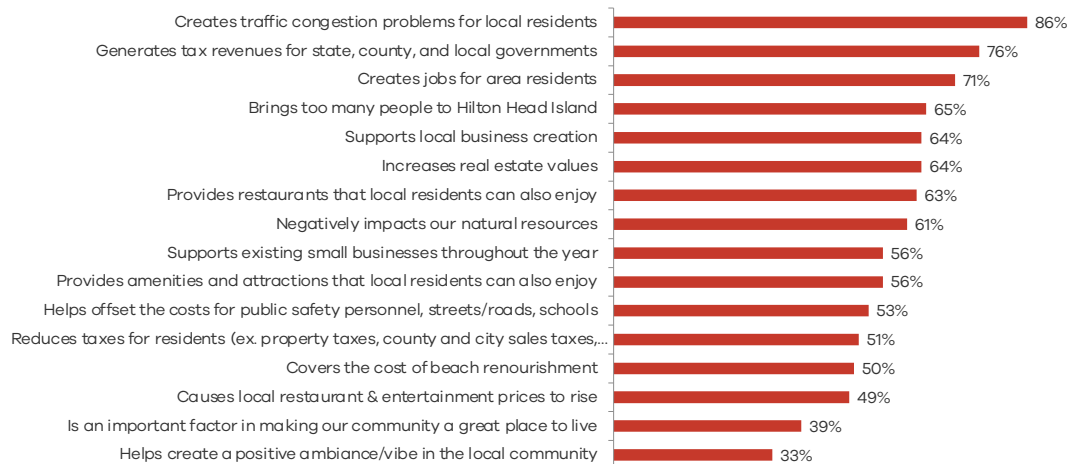
While residents tend to be knowledgeable about tourism and its benefits, opportunities exist to further educate residents on tourism's impact on their lives and their finances.

KEY INSIGHT #2

MMGY Travel Intelligence

KEY INSIGHT #2

Tourism on Hilton Head Island...



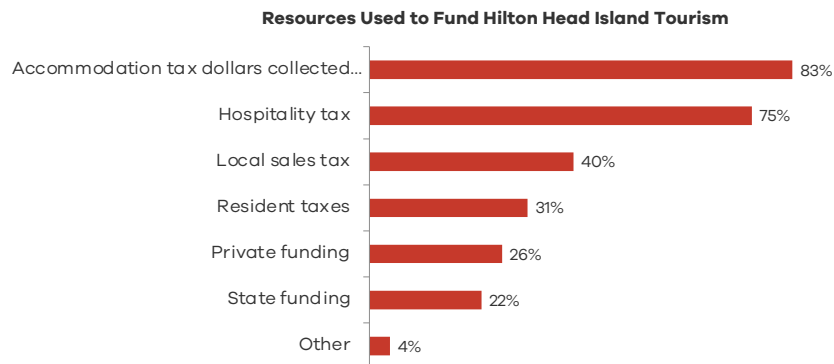
MMGY Travel Intelligence

- 24 -

Please indicate your level of agreement with the following statements.

KEY INSIGHT #2

24% Of Hilton Head Island Residents say they don't know what resources fund the Hilton Head Island-Bluffton Chamber of Commerce



KEY INSIGHT #3

Nearly all residents feel pride in being Hilton Head Island residents and feel it offers high-quality experiences, dining, and shopping.

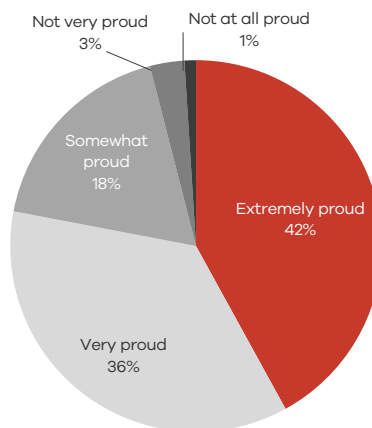
KEY INSIGHT #3

MMGY Travel Intelligence

KEY INSIGHT #3

Three-quarters of Hilton Head Island residents are extremely or very proud to be Hilton Head Island residents, while one quarter are at least somewhat proud to be residents.

Pride in Hilton Head Island Residency



MMGY Travel Intelligence

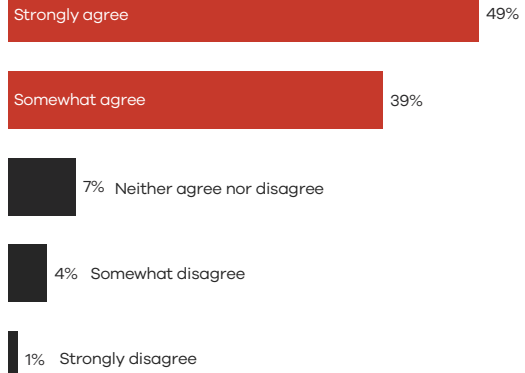
- 28 -

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

KEY INSIGHT #3



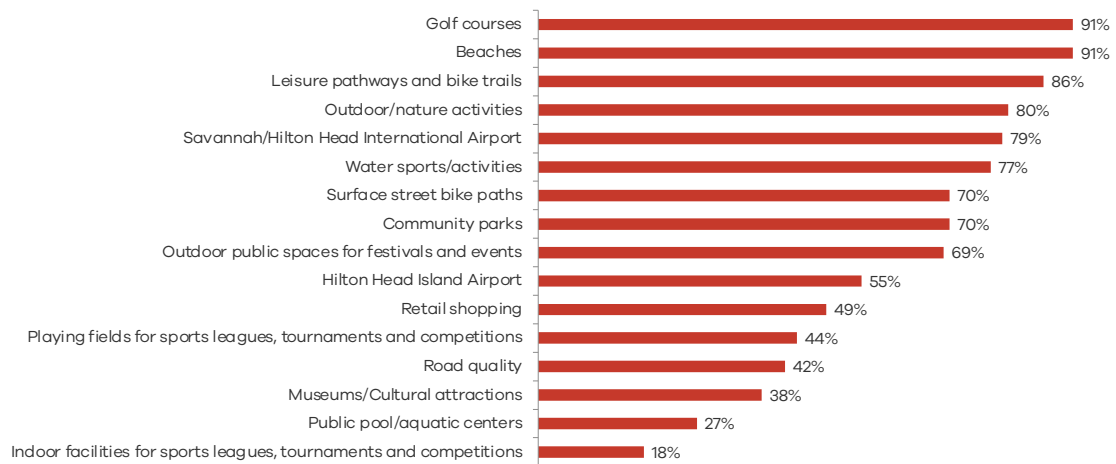
"I BELIEVE HILTON HEAD ISLAND IS A VERY SAFE PLACE TO LIVE"



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

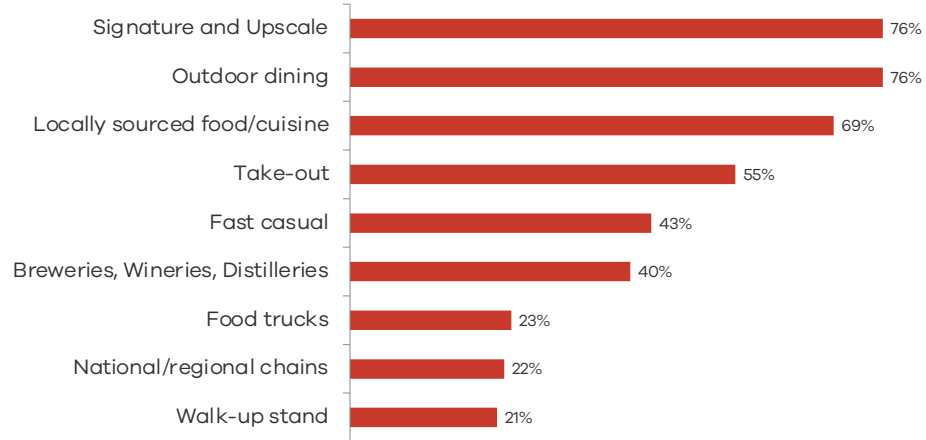
KEY INSIGHT #3

Highest Perceived Hilton Head Island Experiences



KEY INSIGHT #3

Perceived High Quality Dining Options

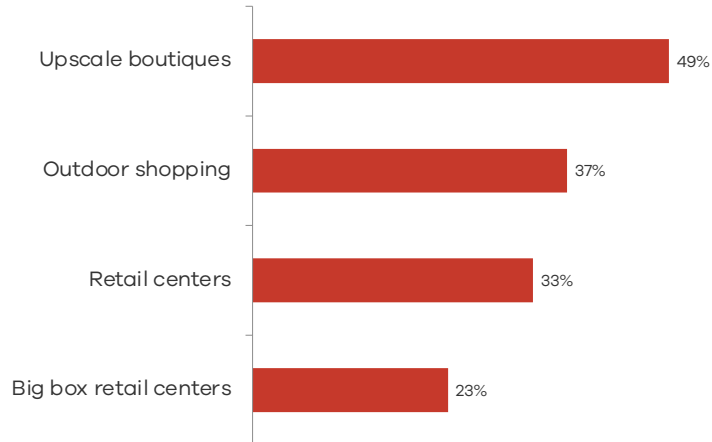


- 31 -

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

KEY INSIGHT #3

Perceived High Quality Shopping Options



- 32 -

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

KEY INSIGHT #4



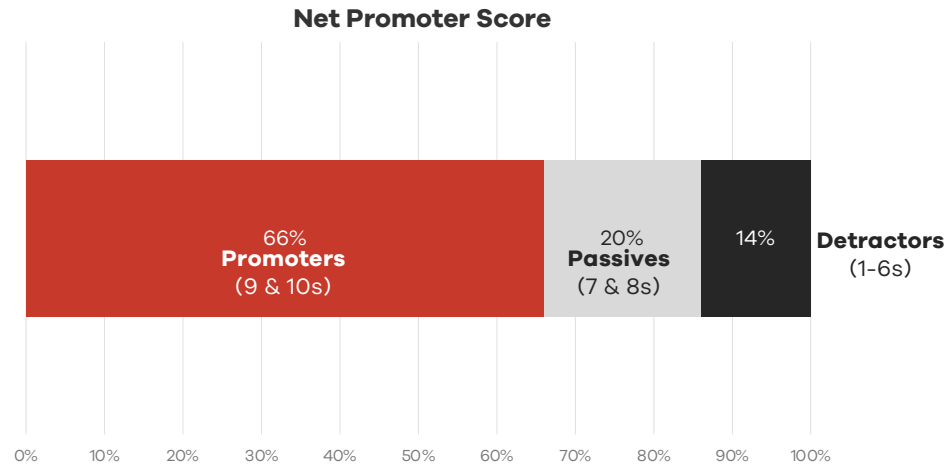
While residents give Hilton Head Island a high Net Promoter Score (NPS), many acknowledge a perceived negative impact of tourism that has dampened their enthusiasm for it.

KEY INSIGHT #4



KEY INSIGHT #4

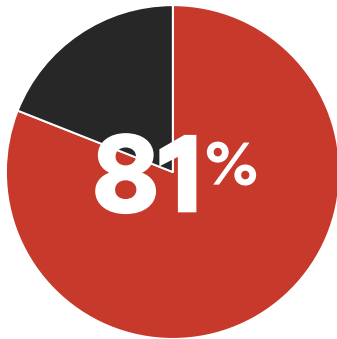
The Net Promoter Score for Hilton Head Island among residents is +52 meaning there are more promoters than detractors among residents.



- 35 - 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 #4

% OF RESIDENTS WHO CONSIDER THEMSELVES ENTHUSIASTIC ADVOCATES OF HILTON HEAD ISLAND



Do you consider yourself to be a passionate advocate for Hilton Head Island?



KEY INSIGHT #4

The top attributes passionate advocates recommend when talking about Hilton Head Island as a vacation destination are the Beaches, Restaurants, Biking/Bike paths, and Golf/Golf courses.



- 37 -

As an advocate, what are your favorite island attributes to share and talk about when recommending Hilton Head Island as a vacation destination? (displaying top 60 attributes – see verbatims)

KEY INSIGHT #4

Negatives Aspects to Tourism on Hilton Head Island

Traffic/Overcrowding

The overwhelming response to this question is the traffic and congestion caused by tourists. This also causes a lack of parking and difficulties getting into local restaurants.

Trash/Littering

Residents also feel that tourists leave a significant amount of trash and litter on the beaches, especially during the Summer season.

Disrespectful Tourists

Residents believe that tourism is attracting a more disrespectful tourist to the Island that doesn't respect the natural resources and residents. These tourists are also partying more.

Other mentions:

- Two days of timeshare check-ins/check-outs
- Affordable housing
 - Some resident feel there isn't enough
 - Others believe it deters from the high quality of the Island
- Over-development/commercialization



- 38 -

Do you feel there are negative aspects to Tourism on Hilton Head Island? If yes, what?

KEY INSIGHT #4

WHAT CAN HILTON HEAD ISLAND DO?

“Improve the housing for workforce. Be sure we pay competitive wages to recruit and retain employees in the hospitality sector in particular

“Attract higher-end quality of guests.

“More unique local shops, artisans, artists; restaurants. No National restaurant chains..... keep things unique to HHI..... uniquely boutique!

“Improve the roadway, more landscaping, make use of vacant property like the big concrete lot on main street to bring nature and encourage outdoor activities

“Second set of bridges to get onto the island.

“Capitalize on the unique culture and history of Hilton Head. Cultivate Gullah cultural centers. Appeal to visitors who are interested in nature and would respect our environment. Visitors who are educated or interested in the natural world and want to explore our beaches respectfully.



- 39 -

What could Hilton Head Island do to make the City more attractive to entice travelers to visit here rather than to another City?

COMMUNITY PERSPECTIVES RESIDENT STUDY

RESEARCH REPORT – JULY 2021



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



2021 VISITOR PROFILE STUDY:

OFFICE OF TOURISM ANALYSIS,
COLLEGE OF CHARLESTON



Hilton Head Island Visitor Profile Survey

2021

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HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



COLLEGE
of
CHARLESTON

SCHOOL OF BUSINESS
OFFICE OF TOURISM ANALYSIS

PREPARED FOR:

HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Baby Boomers represented 49.9% of the respondents, followed by Gen X (22.0%), and then Millennials (21.8%). Over 56% of those surveyed had a Bachelor's degree or higher, and more than 50% had an annual household income of \$100,000 or more per year. Also, just over three-fourths of the respondents were married. Based on a comparison with the prior survey, these characteristics suggest a trend towards younger travelers visiting the area.

POINT OF ORIGIN

The respondents resided in 380 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the US, stretching from east to west coast. More respondents resided in Ohio than any other state (11.3%). Second was Pennsylvania (7.1%), followed then by New York (6.2%), Georgia (5.9%), North Carolina and California (4.7% each), Florida (4.0%), and then Virginia (3.8%). In-state visitors did not make up a significantly large portion of the respondents (3.3%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ-PA; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Pittsburgh, PA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Cleveland-Elyria, OH; Los Angeles-Long Beach-Anaheim, CA; and Cincinnati, OH-KY-IN.

Canada remains the top international origin market amongst respondents (49.3%), followed by Europe (17.3%) and Asia (9.3%).

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (75.4%), relaxation (51.5%), and spending time with family (46.6%), followed by biking (16.4%), golf (13.7%), and culinary experiences (12.2%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include shopping, nature-based activities, and water excursions.

Of those surveyed, 38.5% of overnight visitors and 57.8% of day trip visitors 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 3.8 for overnight visitors and 2.1 for day trip visitors. The main mode of transportation to the island continues to be personal/family car (67.6%). However, flying into the destination increased notably from the prior survey (19.5% to 25.5%), with the proportion of visitors flying into Hilton Head Island Airport rising substantially (12.8% to 39.8%).

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.9 nights, hotel visitors stayed 5.5 nights, timeshare visitors stayed 8.3 nights, and second homeowners stayed 10.4 nights. The overall average was 6.7 nights.

Home/villa rental continues to be the most popular choice of accommodation for overnight visitors (37.2%), followed by resorts (20.9%), hotels (15.0%), timeshares (14.2%), and second homes (4.3%).



TRAVEL PLANNING

VRBO remains by far the most popular online booking platform for villas/homes (34.2%), followed by local vacation rental companies (22.9%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (15.1%). The percentage of respondents booking via Airbnb increased significantly from the prior survey (2.4% to 10.0%).

Other destinations like the Outer Banks, NC; Myrtle Beach, SC; and Gulf Shores, AL remain competitors for Hilton Head Island as alternative beach destinations. The top competing city market was Charleston, SC.

Top reasons for choosing to visit Hilton Head Island were previous visitation (60.0%), beach destination (49.7%), word-of-mouth/recommendation (24.1%), within driving distance of home (23.9%), and wanting to visit somewhere safe during/after COVID-19 (19.0%).

Of those visitors surveyed, 89.3% indicated an intention to return to visit Hilton Head Island.

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=860), just 38.6% had never visited the Hilton Head Island / Bluffton area before, and 48.8% had visited one to five times before.

Of those non-visitors, 37.6% traveled elsewhere, 2.9% found it too expensive, 2.0% mentioned health reasons, 2.0% were hesitant because of unpredictable weather events, 1.5% did not travel at all, and 0.9% did not find what they were looking for. Over 26% stated the COVID-19 pandemic kept them from visiting the Hilton Head Island / Bluffton area. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (26.9%) and Midwest (10.5%) were the most popular. Nonetheless, 49% 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 (56.6%) 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/vacation were: beaches (91.3%), relaxation & rejuvenation (88.8%), passive outdoor adventures (76.7%), historical attractions (73.7%), and romantic couple-getaways (70.6%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (92.7%), ease of access (89.0%), quality of lodging and dining options (89.1% and 88.6%), affordability (87.6%), diversity of dining and lodging options (84.9% and 70.8%), and low traffic congestion (69.3%).





METHODOLOGY

The 2021 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between June 2021 and January 2022, 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 generally contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted in January 2022 on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,084 completed surveys were collected. This report is based largely on the 1,040 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 time this study was completed, in 2020. Because the prior (2020) report looked at visitation that occurred primarily in 2019, such results are labelled as “2019” throughout this report, rather than as “2020,” which is how they were labelled in the prior report. Likewise, the data from the current survey are labelled as 2021 because the vast majority of these respondents visited in 2021. When 2019 data is not presented, it is because the question was not asked in the previous survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2019 and 2021. 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	2019	2021	Change (%)
Villa/Home Rentals	755,953	962,686	27.3%
Hotels/Resorts	473,679	508,977	7.5%
Timeshares	454,093	481,934	6.1%
Second Homeowners	613,216	719,302	17.3%
Non-paying Guests	159,137	186,667	17.3%
Day trippers	228,250	267,290	17.1%
Total Visitors	2,684,328	3,126,856	16.5%

Table 1: Visitor Estimates for 2019 and 2021





HILTON HEAD ISLAND
SOUTH CAROLINA