

**THE TOWN OF HILTON HEAD ISLAND
MAYOR'S TASK FORCE FOR THE FUTURE
MINUTES OF MEETING**

Minutes of the April 26, 2010 meeting

Time: 3:30 p.m.

Place: Hilton Head Public Service District, Community Meeting Room

Members Present: Dave Ames, *Chairman*; Marc Frey; Steve Birdwell; Peter Kristian; Elizabeth Lamkin; Kumar Viswanathan; Gail Quick; *Committee Members*; Drew Laughlin, *Council Liaison*; Steve Riley, *Town Manager*.

Members Absent: Tom Barnwell; Joe Harden; Bud Shay; *Committee members*

Staff Present: Shawn Colin, *Senior Planner*; Sue Blake, *Executive Assistant to the Town Manager*.

Media Present: Laura Nahmais, *Island Packet*

I CALL TO ORDER

Chairman Ames called the meeting to order at 3:30 p.m.

He noted that Mr. Eric Esquivel was unable to attend today's meeting due to a conflict.

II FREEDOM OF INFORMATION ACT COMPLIANCE

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

III REPORTS FROM COMMITTEES

• **Hospitality Subcommittee**

Steve Birdwell, the chairman of this subcommittee introduced the other members – Marc Frey, Mark Baker and J. R. Richardson, Jr. Mr. Birdwell presented a power point of their subcommittee's draft report. This report presented the state of the hospitality industry, considered the importance of a thriving hospitality industry to the quality of life on the Island, considered essential elements required to allow the industry to prosper and grow and recommended strategies to create an environment for future success. (A copy of the power point will be posted on the website as an attachment to the minutes of the April 26, 2010 meeting.)

• **Retirement Subcommittee**

The subcommittee's next meeting will be on May 3 when they will analyze the data provided by Dr. Salazar from the results of the survey. And they will work on their draft report for the next Task Force Committee meeting.

• **Business Subcommittee**

No report.

V NEW BUSINESS

- **Ad Hoc Committee on Data - Elizabeth Lamkin**

Elizabeth introduced the members of their ad hoc group: Gail Quick, Terry Ennis and Shawn Colin. She explained their goal was to seek out sources of meaningful data; provide knowledge and insights from data to enable decision-making, strategy formulation and funneling for the Task Force and Sub-Committees; assist in creation of measurable metrics for decision making and provide means to test hypothesis. Elizabeth presented a power point on data analysis to the Task Force and suggested they explore a partnership with the University of South Carolina-Beaufort Research Initiative. (A copy of the Data Analysis PowerPoint will be posted on the website as an attachment to the minutes of the April 26, 2010 meeting.)

- **Survey Results - Peter Kristian**

Peter Kristian presented a report on the preliminary results of the Subcommittee's survey. (A copy of the Survey Analysis power point by Dr. Salazar is posted on the Town's website.)

- **Latino Perspective - Eric Esquivel**

(No report – unable to attend)

- **Public Comment**

A representative of the League of Women Voters noted they had recently heard a presentation from the Beaufort County Administrator on retirees and a public transportation report from the Lowcountry Council of Governments. She recommended these reports as being very informative.

VII ADJOURNMENT

The meeting was adjourned at 5:04 p.m.

Hilton Head Island Mayor's Task Force Hospitality Sub-Committee Report

April 26th, 2010

Preliminary

PURPOSE OF REPORT:

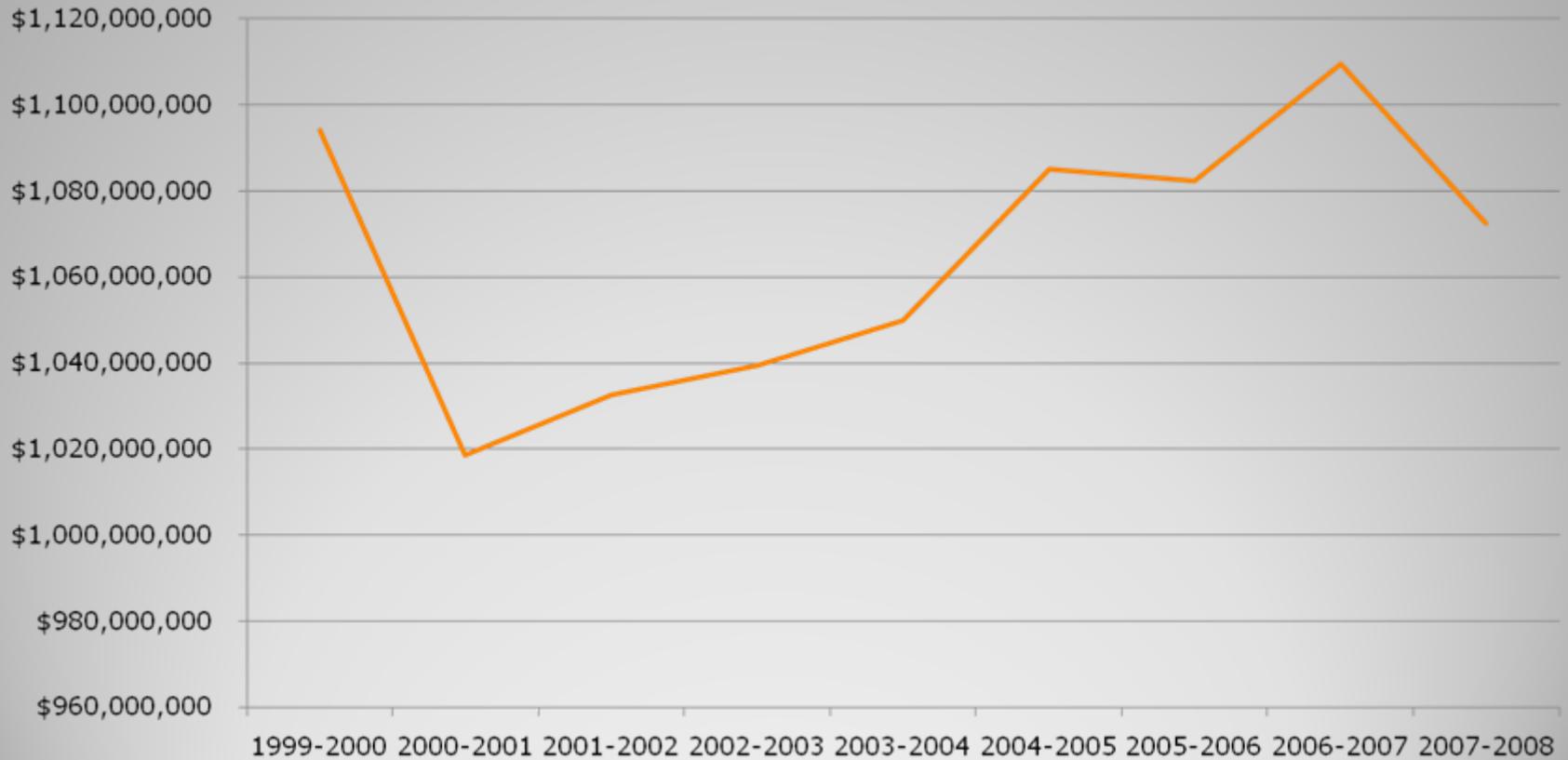
- Review current state of the Hospitality industry on Hilton Head Island
- Consider the importance of a thriving and prospering Hospitality industry to the overall “quality of life” for all residents and guests of Hilton Head Island
- Identify essential elements required to allow the Island’s Hospitality industry to grow and prosper
- Recommend implementation strategies needed to create an environment for future success of the Island’s Hospitality industry

Hospitality Industry Sector:

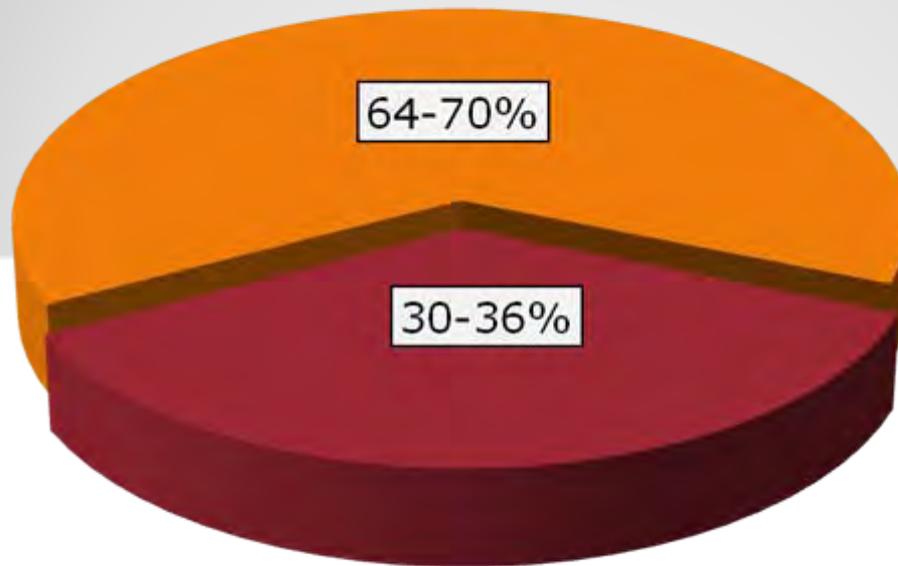
- **Hospitality and tourism is the primary driver of the Island economy!**
 - ✓ Over \$1 billion in annual visitor spending
 - ✓ Produces a large majority of all gross sales
 - ✓ Largest employment segment of our economy
 - ✓ 71% of current residents first traveled to HHI as a leisure, convention or business guest
 - **Visitor are our future neighbors!**

Total Revenue from Visitors:

Total Revenue/Income from Visitors



Visitor contribution to Island Economy



■ Visitor Contribution to Gross Sales

Source: USCB Report (Salazar) 2008 Data

Visitor Economic Cycle



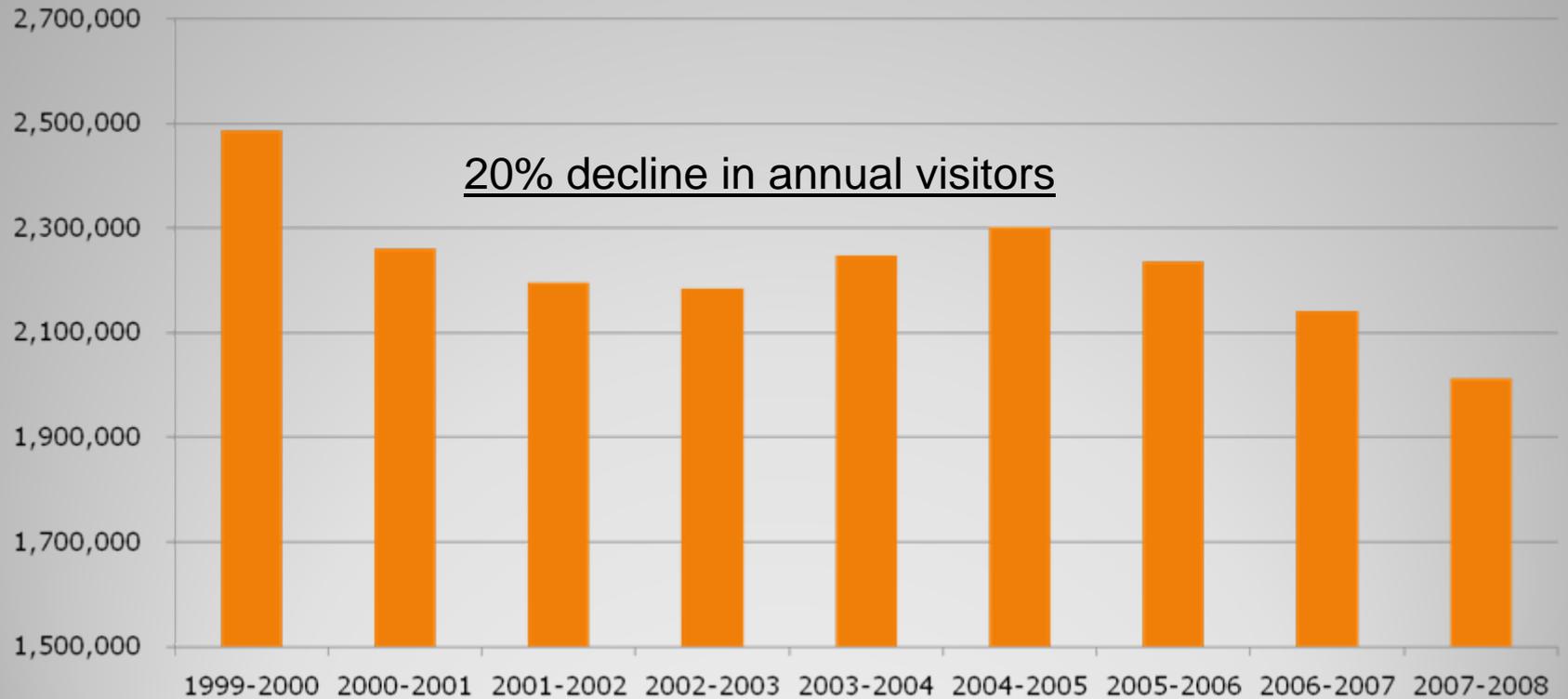
Hospitality industry sector:

- **Benefits of visitors spending:**

- Funds beach re-nourishment thru additional tax
- Generates other taxes (sales tax, admissions tax, accommodations tax)
- Support business community allowing businesses to flourish (restaurants, retail shops, stores, nearly every Island business)
- Supports the Arts Center and cultural activities
- Supports events (Heritage, Concours, Winefest)
- Supports non-profit organizations

Number of Visitors:

Annual Visitors



Decline in Visitors:

- **10-Year Decline in Visitors is a major concern for Hilton Head Island:**
 - Aging infrastructure and resort facilities
 - Lack of well-funded, well-organized marketing message
 - Newer, trendier competitive destinations
 - Limited new guest experiences
 - Difficult vehicle access on peak arrival/departure periods
 - Lack of great gathering places
 - Decline in welcoming, hospitable atmosphere

Decline in Visitors:

- **Decline in visitors represents \$400-\$500 million in missed economic opportunity – 27% of current activity**
 - Approx \$1 billion in current visitor spending
 - Approx \$400 million in resident spending
- **This disturbing trend must be reversed**
- **Rely on Strengths, Core Values and Natural Resources**

Decline in Visitors:

Visitors who choose to become residents:

- Our future neighbors and community volunteers
- They begin the process of preserving our way of life and quality of life
- Bring essential financial, intellectual and creative capital
- Allow HHI to become less dependent on Hospitality in the future

Island Strengths:

(as identified in SWOT analysis)

- An Island, natural beauty, beaches, water, marshes, trees, temperate climate
- People: educated, engaged, caring, giving, affluent population
- Brand name recognition
- Variety and number of high-quality amenities/events/cultural activities
- Quality of planned communities

Core Value Themes:

- **Involvement** – community-minded spirit
- **Learning** – enlightenment, fulfillment
- **Legacy** – protection of natural assets
- **Sense of Place** – uniqueness, belonging
- **Shared Community Prosperity** – business opportunities, job availability, community-wide benefits

Traveler Values

80 Million
Gen X and Y

80 Million
Baby
Boomers



Values that Connect Them

Family
Experiences
Authenticity
Multi-Generational Travel

Potential Visitors:

By highlighting our natural recourses and capitalizing on our strengths and Core Values, the following potential visitors have been indentified.

- **Classic families**
 - Largest segment of current travelers
 - Immediate families and multi-generational
 - Frequent/repeat visitors to HHI

Potential Visitors (continued):

- **New, first-time visitors**
 - Younger travelers (25-45 years of age)
 - Interested in outdoor activities and exploration
 - Gen X and Gen Y's
- **Affluent travelers**
 - Oceanfront homes/villas, boutique Inns
 - Diverse interests
 - Multiple vacations (5-6 vacations annually)

Potential Visitors (continued):

- Meeting, retreat, and corporate group attendees
- Golf and Tennis Groups
- Other Sports and Recreational Groups
 - Outdoor and Watersports sports and events
- Other potential visitors
 - Arts and Cultural-based travelers
 - Health, Wellness and Life-Enrichment visitors

Essential Elements:

- **A welcoming, enthusiastic community that fully embraces our Visitors**
 - Guests feel welcomed to visit and return to our Island paradise
 - Town environment receptive to redevelopment and revitalization
 - Sense of community and overall hospitable environment
- **Easy and convenient access to the Island**

Essential Elements (continued):

- **Energetic and dynamic workforce**

Supported by a growing and dynamic community

- Affordable housing options
- Outstanding school system and school choices
- Excellent medical facilities and medical professionals
- Premier parks and recreational facilities
- Activities of families, children and teens
- Churches with a variety of faiths

- **Access to capital resources**

Implementation Strategies:

- **Destination marketing**

- Current programs are significantly underfunded
- New sources of marketing funds are required
- Review efficiency and effectiveness of current marketing programs
- Collection of accommodations tax from all short-term rental units including those listed on VRBO.com

- **Land Management Ordinance**

- Review/revise LMO to vigorously support redevelopment of aging commercial buildings and infrastructure
- Encourage revitalization of commercial centers

Implementation Strategies:

- **Improve vehicle access and road systems**
 - Widen I-95 and I-26 and expand Highway 278
 - Continue improvements to secondary road systems and parallel connectors on Island
 - Explore public transportation alternatives to reduce car traffic on Island
- **Hilton Head Airport**
 - Enhance airport facilities including lengthening runway to support regional and private aircraft required to sustain a healthy, vibrant and growing community

Implementation Strategies:

- **Create Destination Village Centers**
 - Mixed-use centers with civic open spaces
 - Community gathering places
- **Create new attractions capitalizing on strengths and natural environment**
 - Aspen Institute, Anderson Ranch, medical/health/wellness offerings
 - Historic Mitchellville concept
 - Other historical attractions and Gullah cultural offerings
 - New destination events in shoulder/off-season months

Implementation Strategies:

- **Maintain waterways and improve water access**
 - Identify and implement long-term dredging solution for harbors and waterways
 - Improve water-based recreational facilities to allow access for sailing, rowing, regattas, kayaking, etc.
- **Implement community-wide sustainable programs**
 - Become a leader in sustainability and recognized as the "Green Island"
 - Recycling, energy conservation, renewable energy initiatives, water conservation, etc.

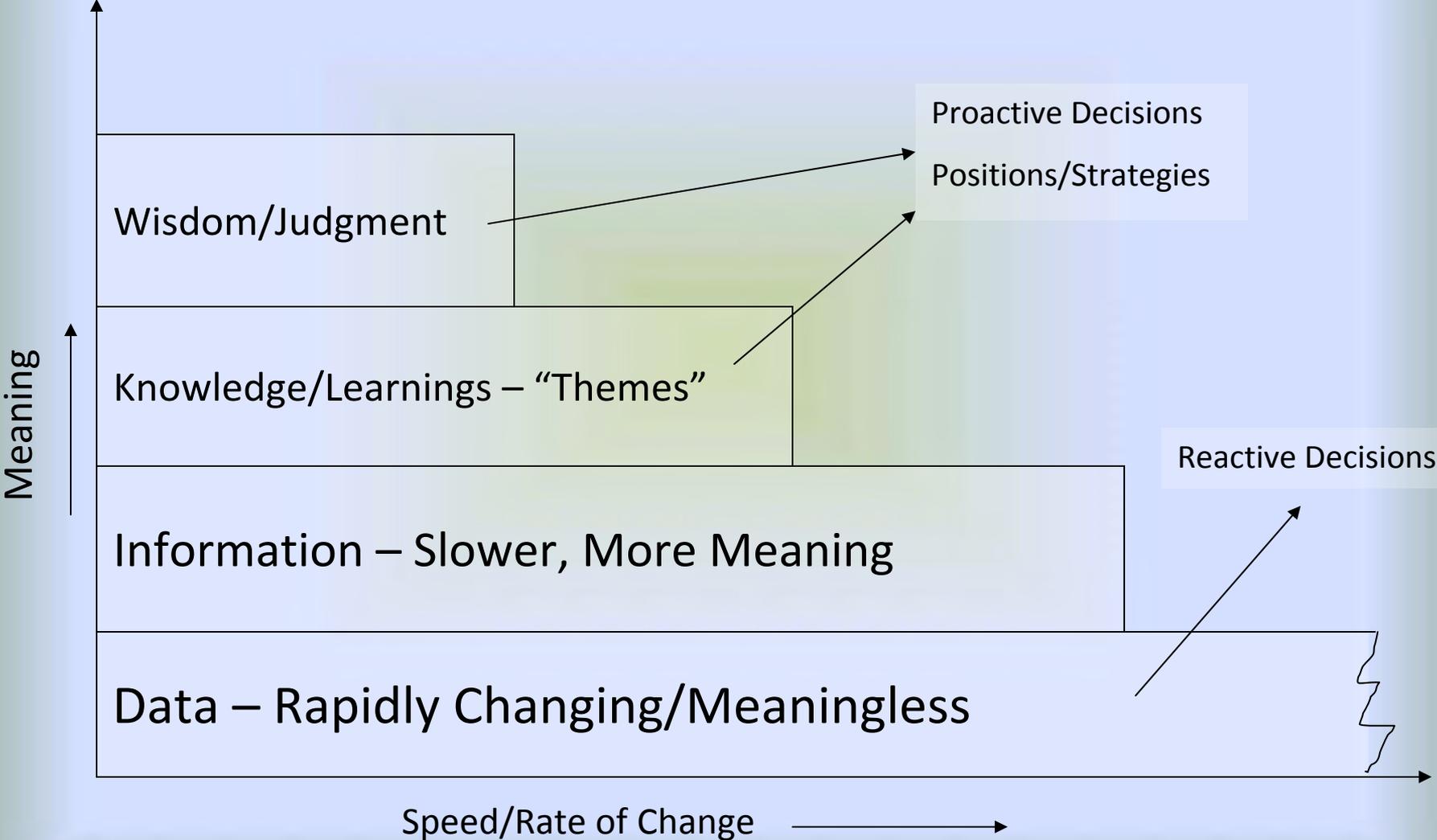
Implementation Strategies:

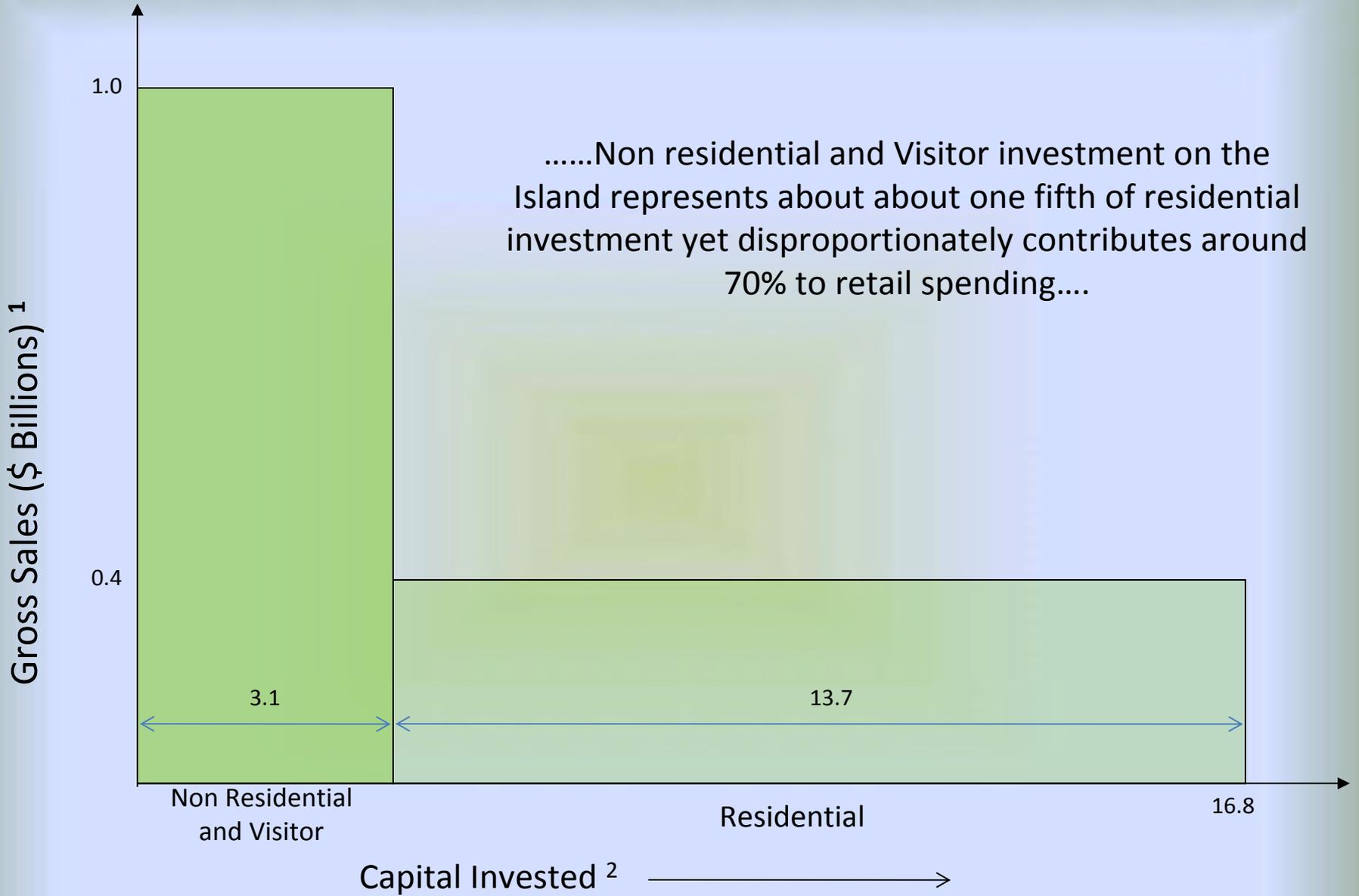
- **Energize and Re-Implement “Island Ambassador” program**
 - Involvement from Hospitality Industry and Business community
 - Encourage participation from all Island residents
 - Focus on improving welcoming attitude and hospitable environment
 - Highlight Strengths, Natural Resources, History, and Culture
- **Improve technology, wireless networks and fiber optic connections throughout the Island**

Conclusion:

- **Visitor trend is declining**
- **The Hospitality industry is the lifeline of our Island economy**
- **Increasing visitors and visitor spending is essential for future revitalization investment**
- **Progress is required to make HHI a desirable place to visit, live, retire, work and invest**
- **Without future progress, our tax base will erode and property values will decline**
- **The community must come together to reverse the trend and improve our Hospitality industry!**

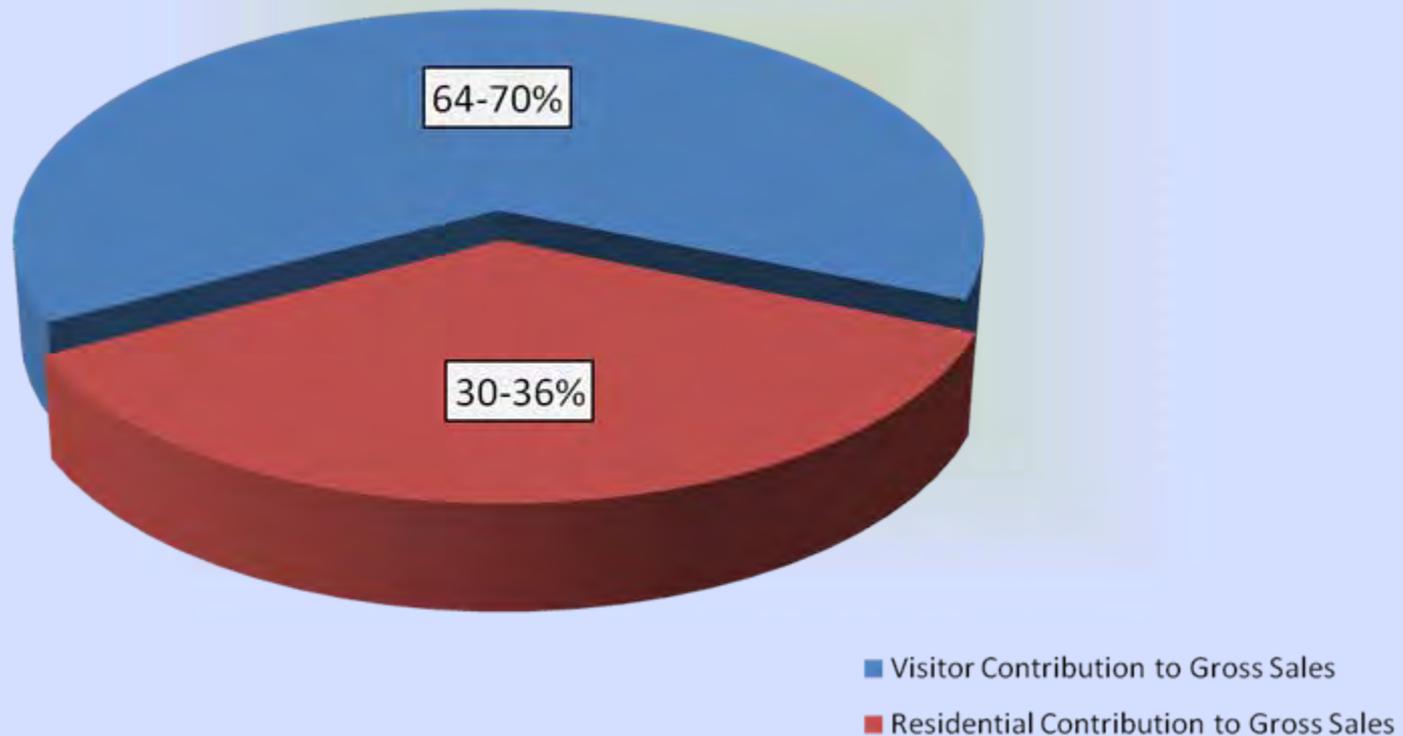
.....DATA IN, AND OF, ITSELF IS MEANINGLESS. OUR GOAL IS TO ENGENDER MEANING IN ORDER TO BUILD A FOUNDATION OF KNOWLEDGE FOR BETTER DECISION MAKING.....





Sources: 1 SC Department of Revenue
 2 Beaufort County/Town of HHI Comprehensive Annual Financial Report

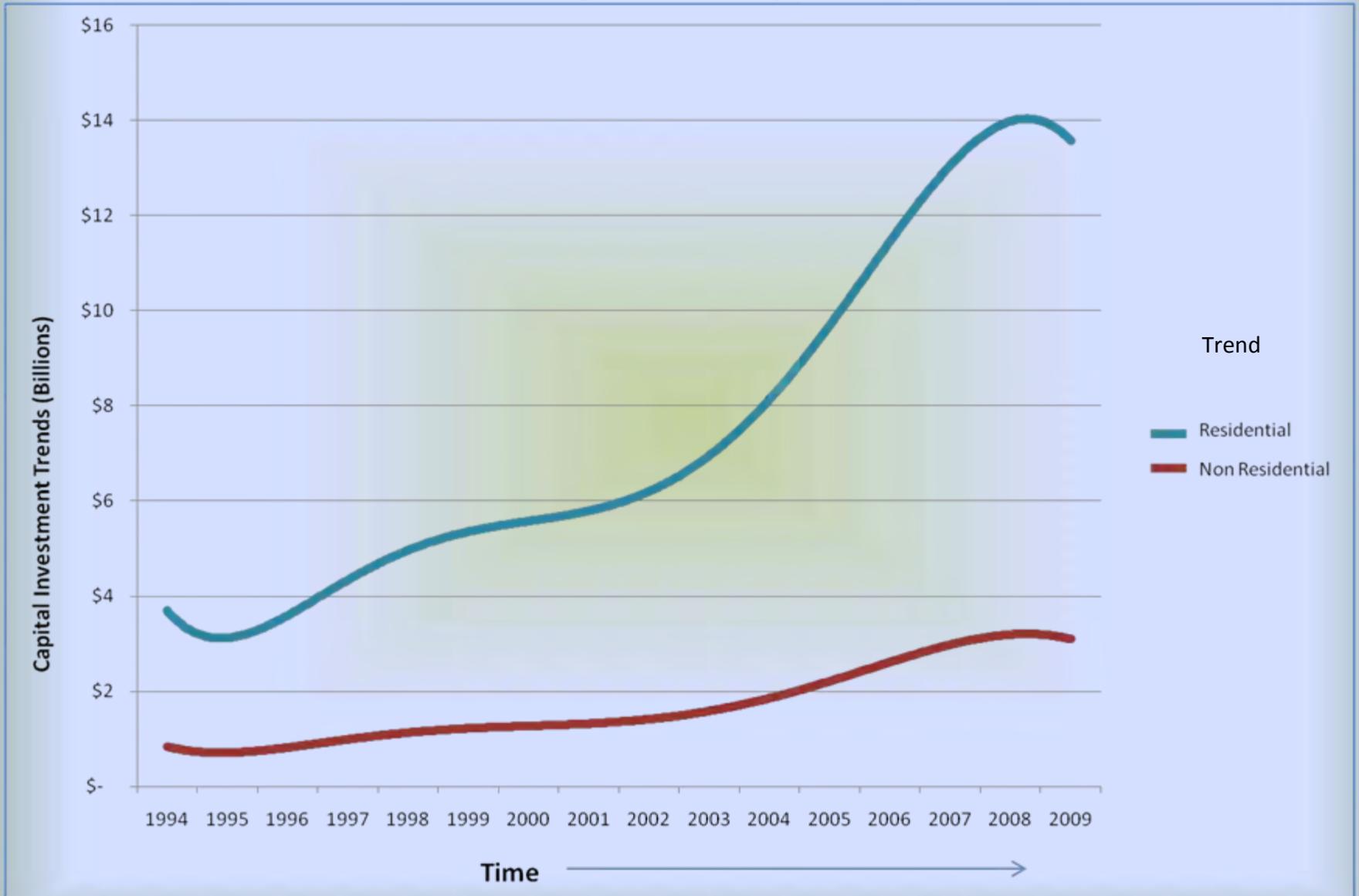
.....TOURISM/VISITOR ECONOMY IS MORE THAN JUST
“ICING ON THE CAKE”... IT’S THE BIGGEST SLICE
Many visitors convert to residents over time.....



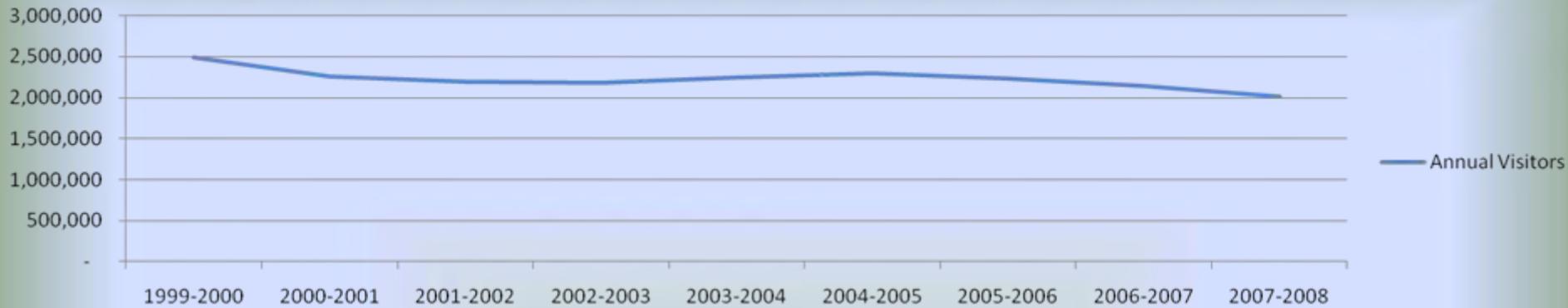
Source: USCB Report (Salazar) 2008 Data

Residential vs. Non Residential Capital Investment

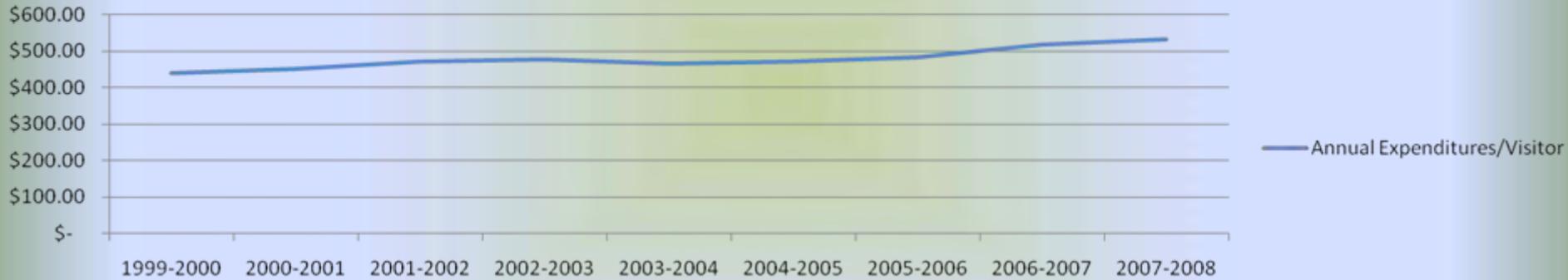
Trending down over past two years



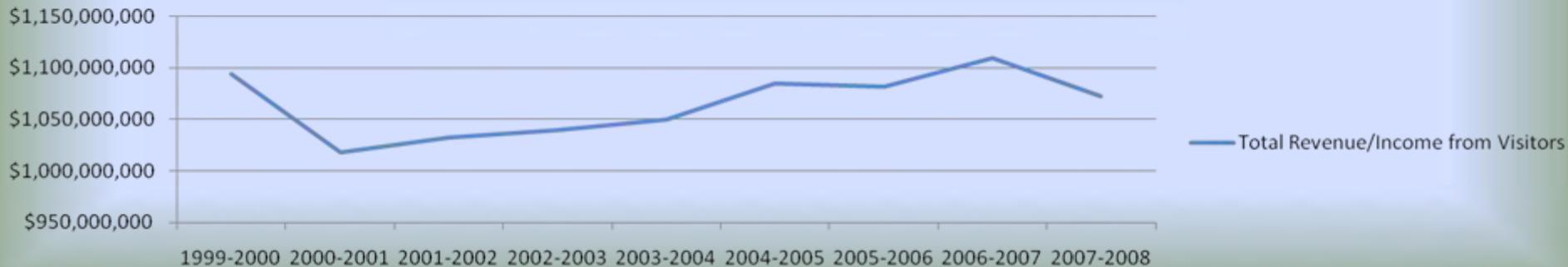
Annual Visitors



Annual Expenditures/Visitor



Total Revenue/Income from Visitors



Preliminary Analyses: Hilton Head Island Residential Survey

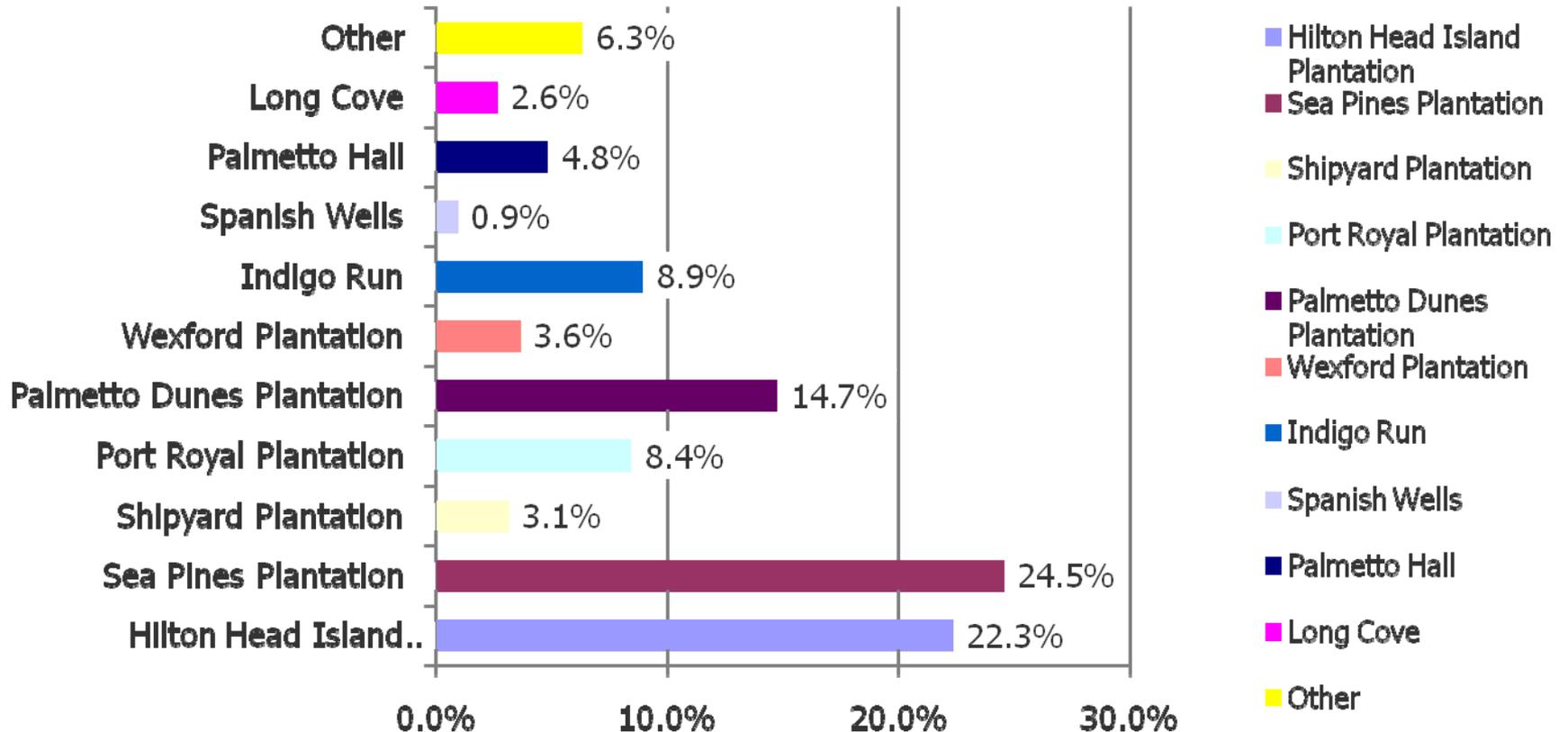


Conducted by:
John Salazar, Ph.D.
*Director of the Lowcountry and
Resort Islands Tourism Institute*

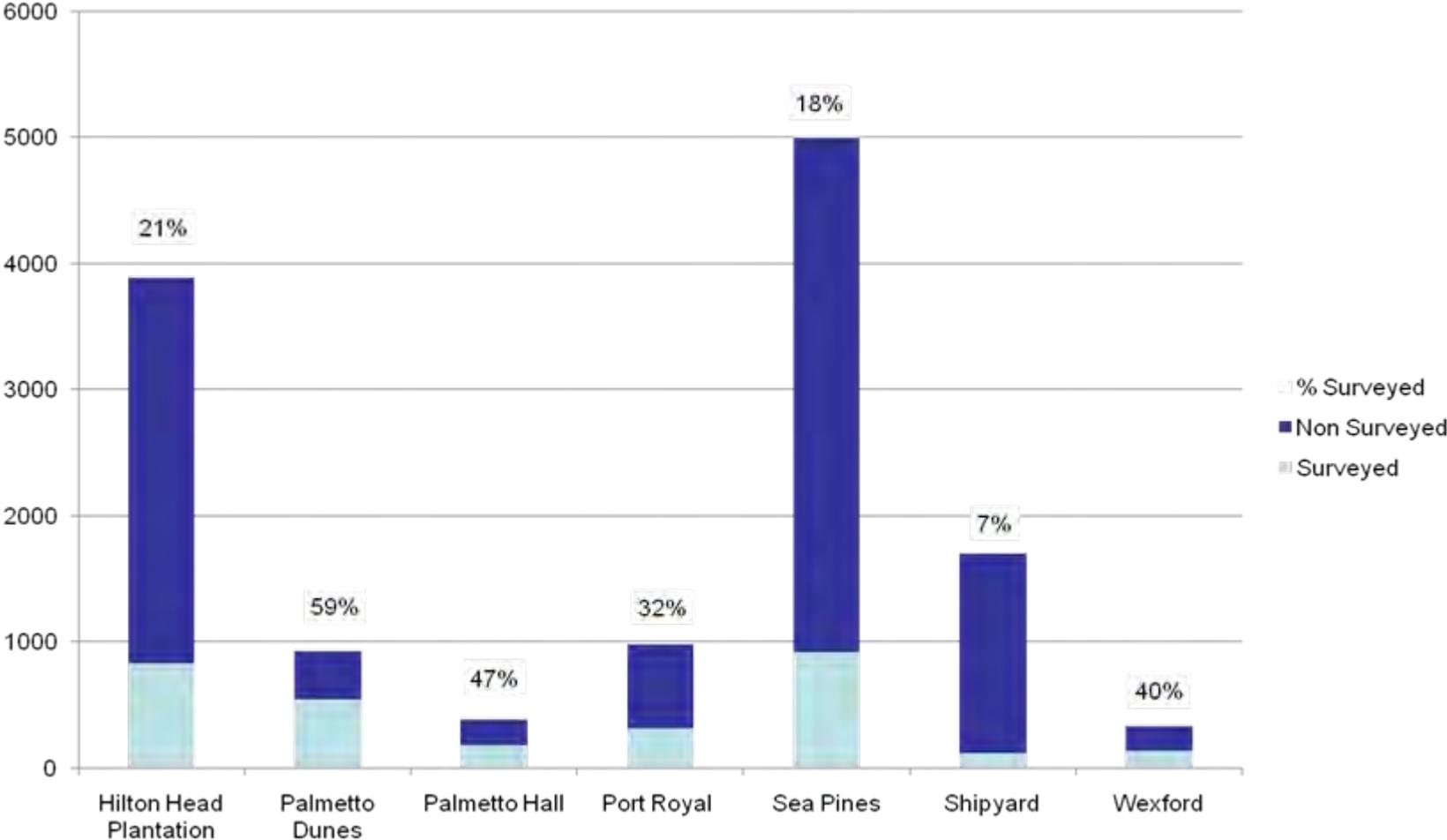
Report Summary

- Largest % of respondents moved from OH, GA, NY, PA, and NJ
- Over 80% primarily visited HHI for the first time for travel and tourism purposes
- The Island's natural amenities are most important to the residential quality of life
- Meeting Facilities, Public Transportation, Access to Colleges are least important to Quality of Life
- Availability of Jobs and the Airport are in need of improvement to support a healthy economy
- Residents feel that Beach, Dining Options, Bike Paths, and Golfing are the most attractive to visitors
- Golfing, Dining, Beach, and Hotels provide the greatest economic impact
- Over 90% rate their quality of life as Good/Very Good

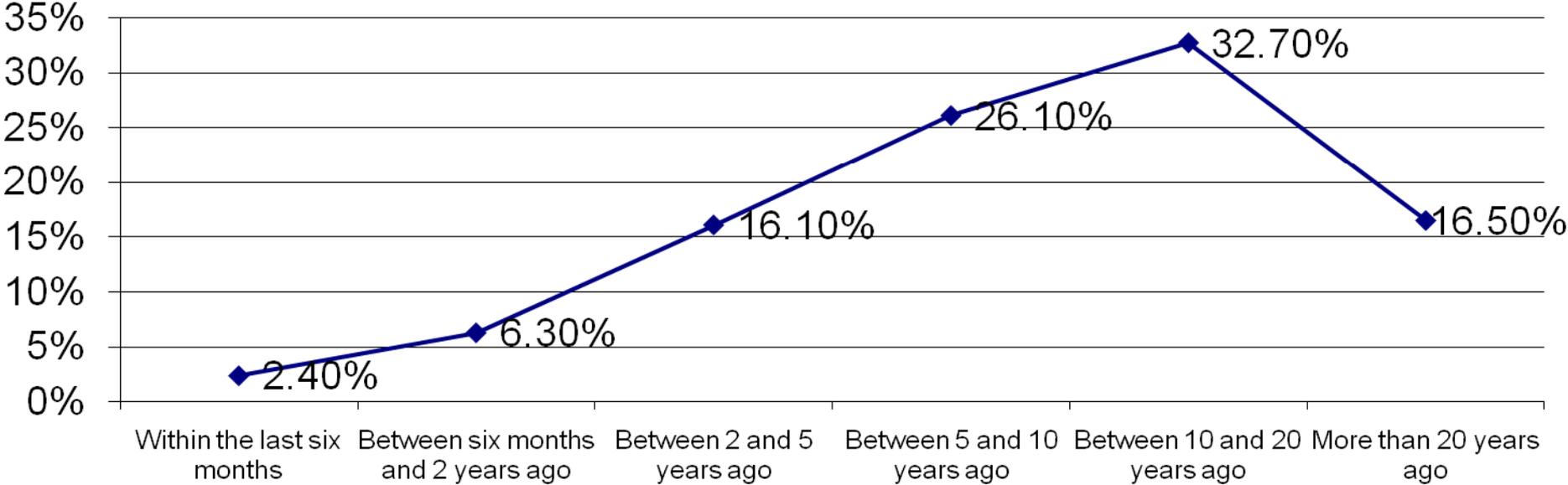
Respondents by Plantation: n = 3738



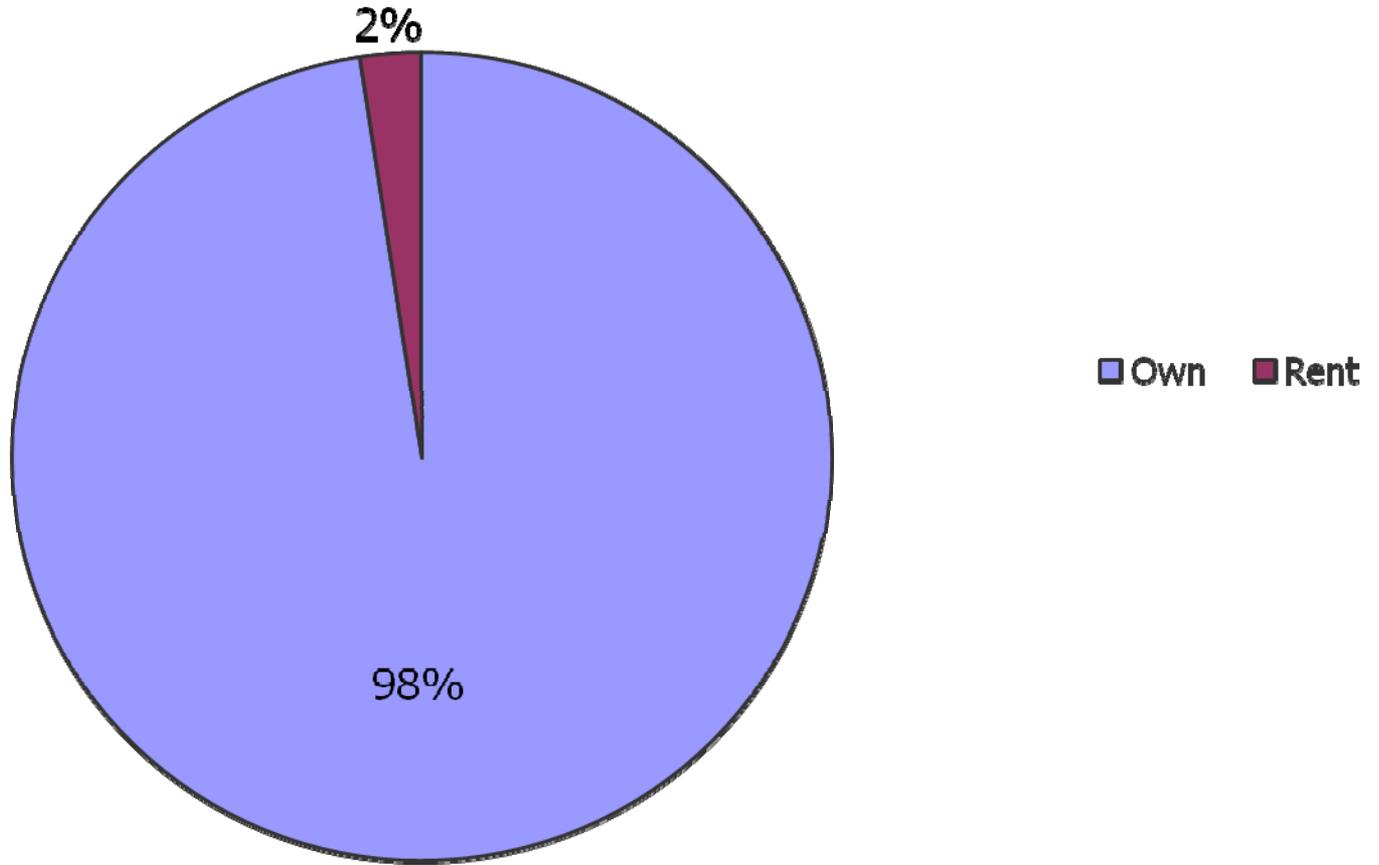
Respondents by Plantation: % Responses



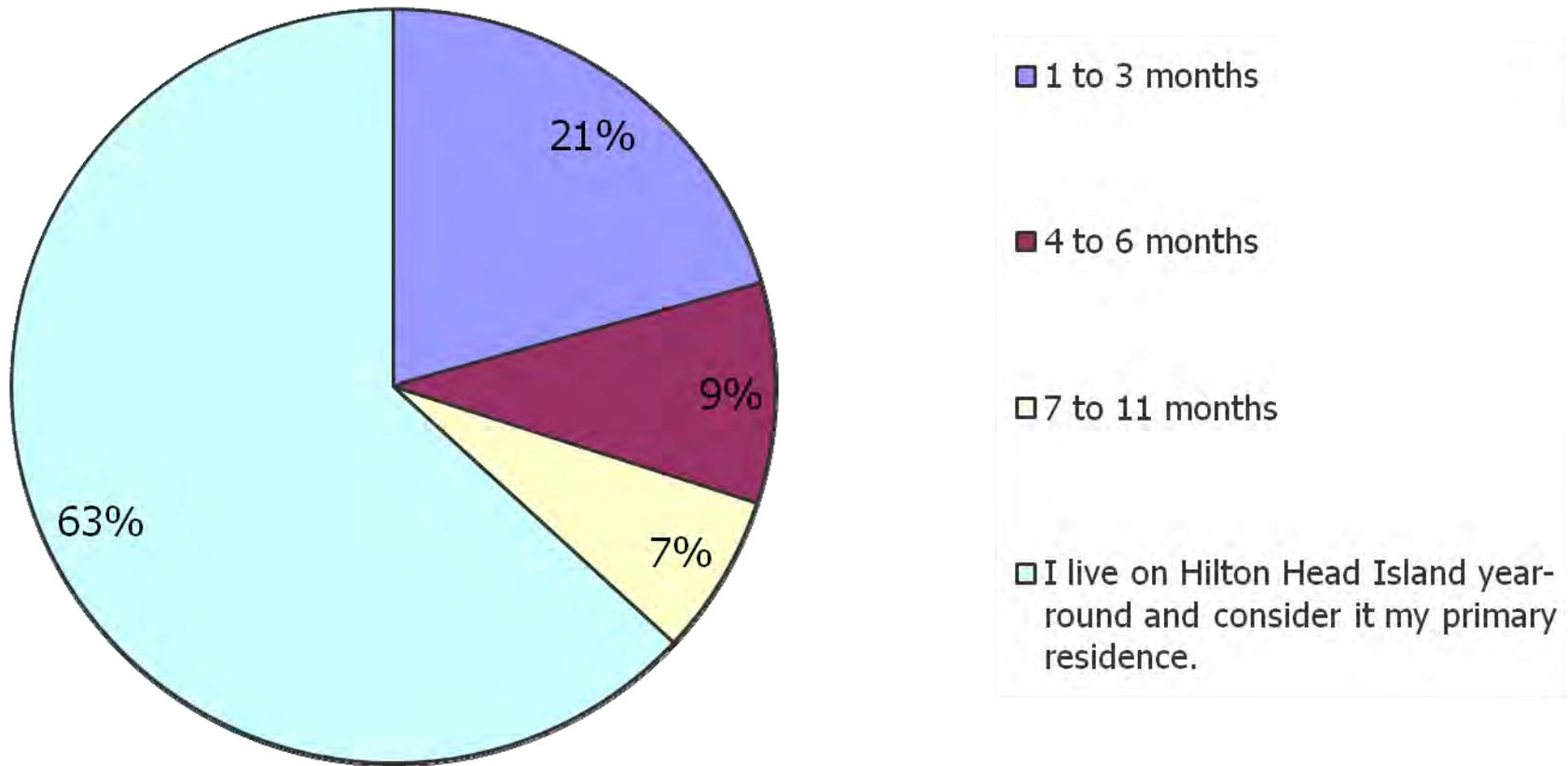
When did you first move to Hilton Head Island?: n = 2990



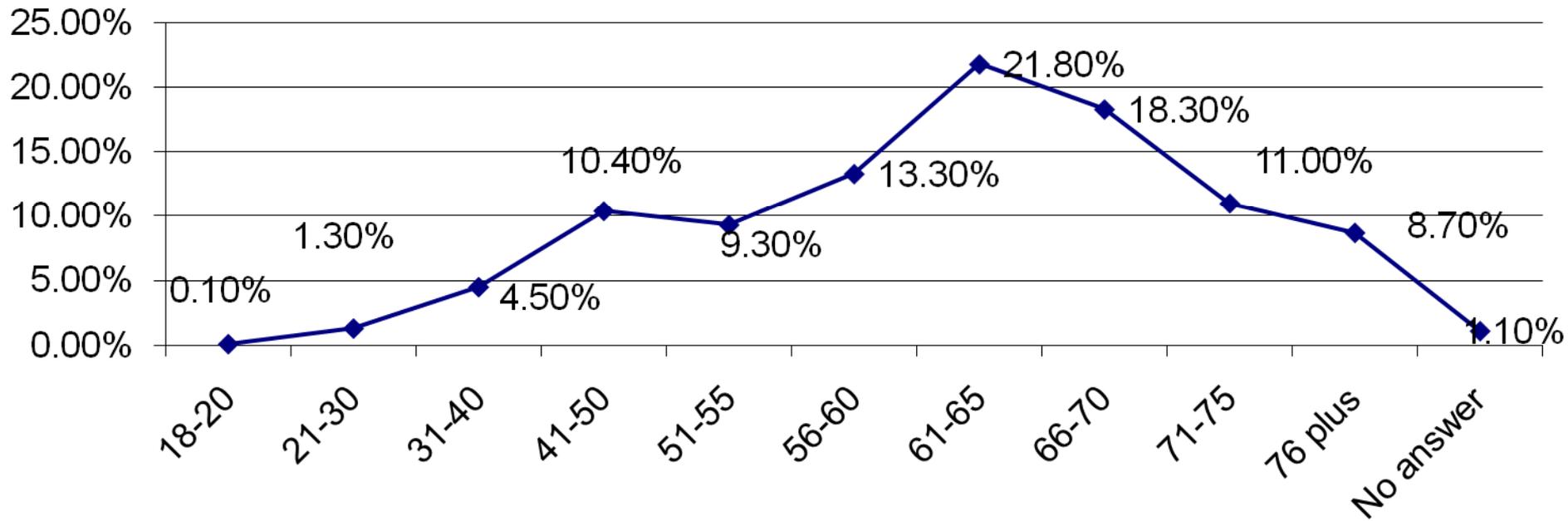
Please Indicate whether you own or pay rent for your primary residence on Hilton Head Island.



On an annual basis, how many months out of the year do you live on the Island?

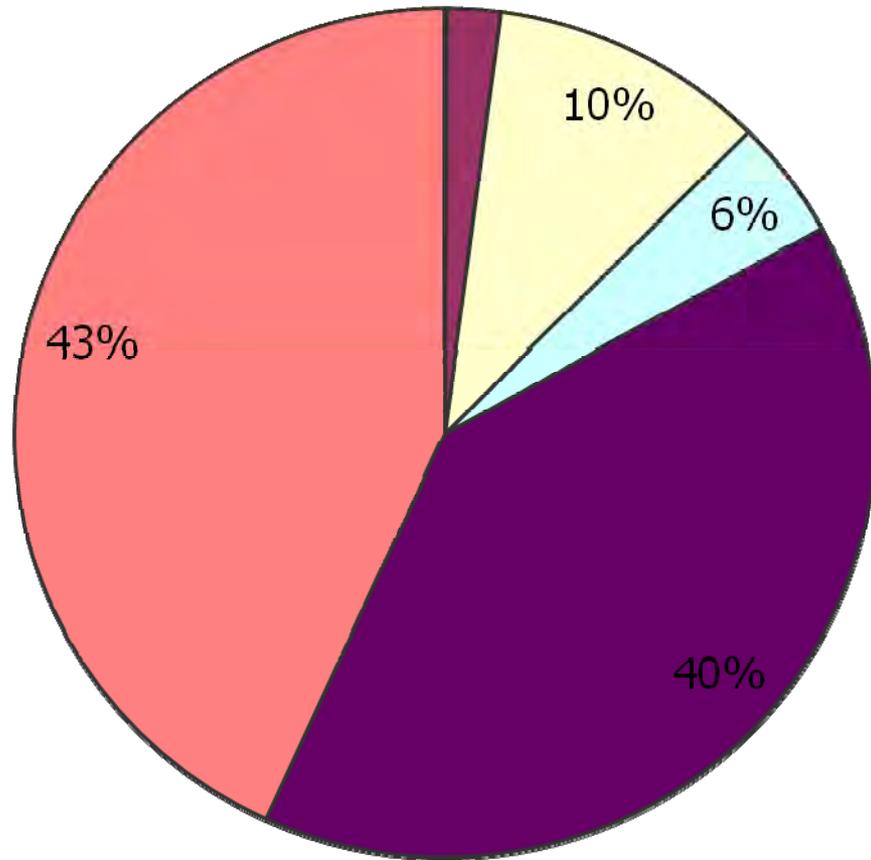


What is your age?



Please indicate your highest level of education.

0% 2%



■ Grade School

■ High School

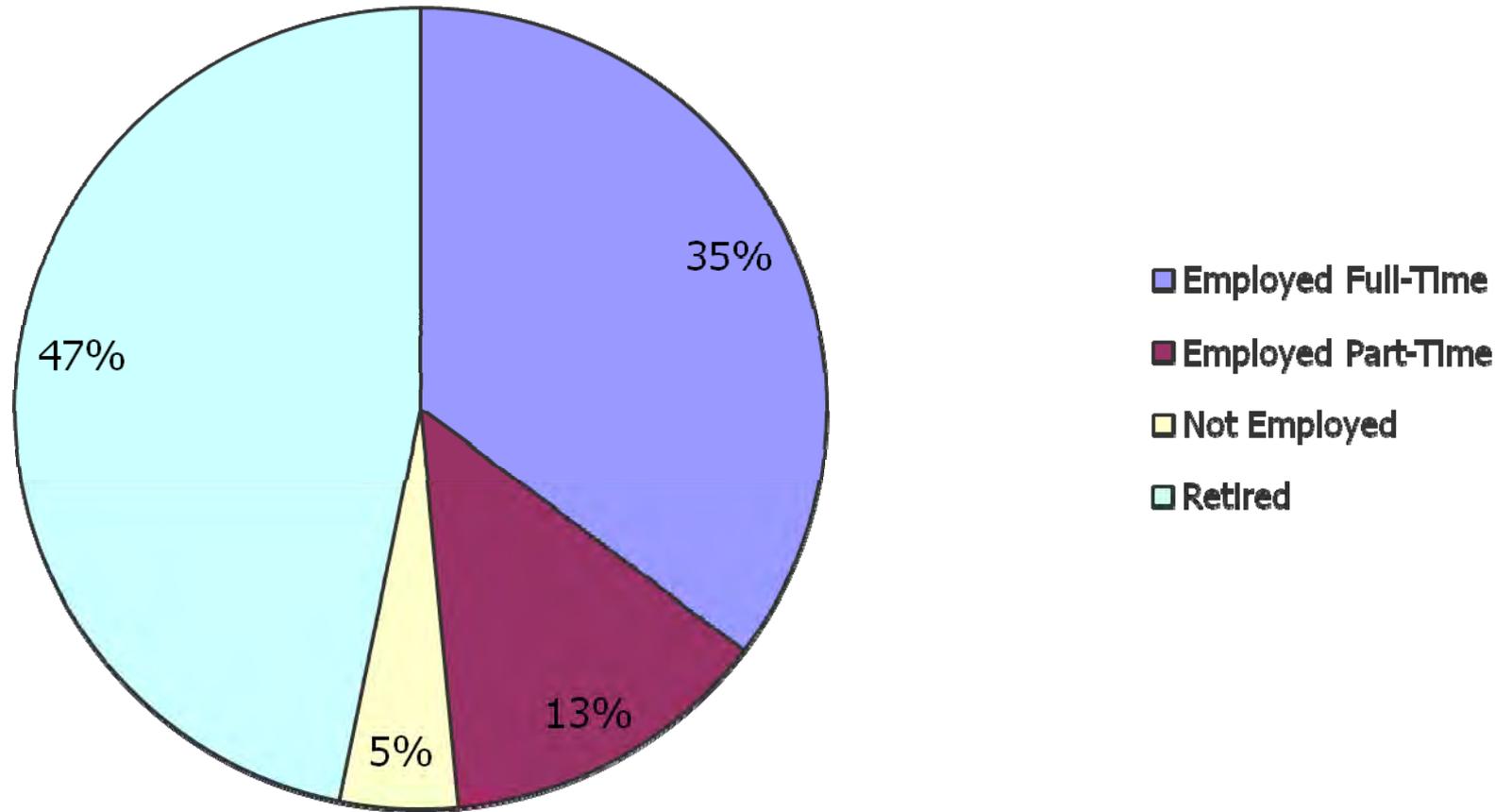
■ Some College

■ Associate's Degree (2 years)

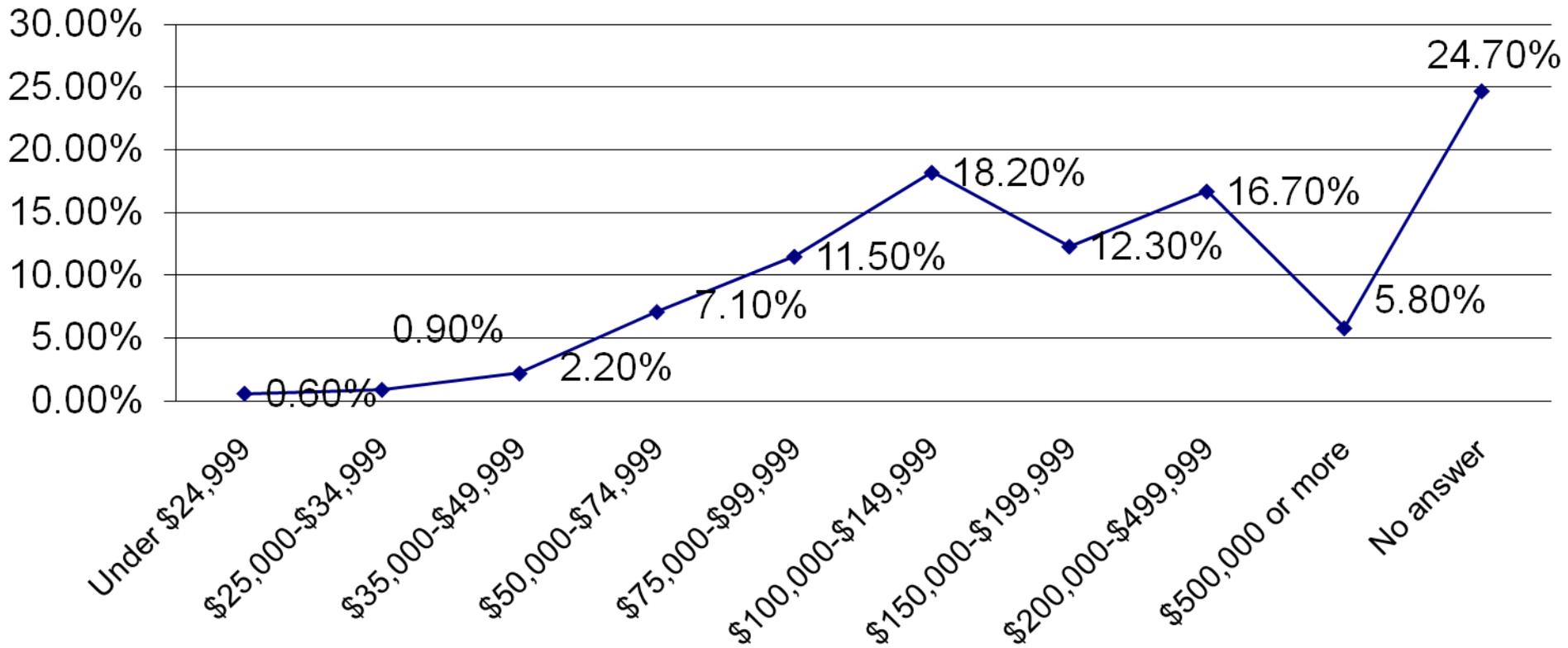
■ Bachelor's Degree (4 years)

■ Graduate Degree (Post Degree/Masters Degree)

What best describes your employment status?



Annual Household Income: n = 2693



Where did you move from?

Rank	State	%
1	OH	8%
2	GA	7%
3	NY	7%
4	PA	7%
5	NJ	6%
6	VA	4%
7	IL	4%
8	CT	4%
9	MD	3%
10	SC	3%

How did you first learn of Hilton Head Island?

Options	Response Percent	Response Count
Friends/family	75.5%	2326
Work colleague	11.7%	361
Information from area Chamber of Commerce and/or Visitor & Convention Bureau	1.1%	34
Online travel reviewers/bloggers	0.6%	19
Search engines (Google, Yahoo!,Bing, etc.)	0.9%	29
Spouse/partner	3.7%	114
Travel agent	0.9%	28
Travel industry experts (travel magazines, TV channels, shows,etc.)	5.5%	168
Other (please specify)		618
answered question		3079
skipped question		704

Over 80% indicated their primary visit to Hilton Head Island was related to travel and tourism

What was the primary reason for your very first visit to Hilton Head Island?

Answer Options	Response Percent	Response Count
Leisure vacation	63.1%	2177
Convention	4.7%	162
Other business	3.5%	122
Visit friends/family	13.7%	472
Just passing through	2.8%	98
To explore the real estate market	3.7%	126
To explore the retirement options	3.5%	121
Work relocation	5.0%	173
Other (please specify)		262
answered question		3451
skipped question		332

For the items below, please indicate the level of importance to YOUR QUALITY OF LIFE for each Hilton Head Island asset or amenity.

Answer Options	Important/Very important	No opinion	Rating Average	Response Count
Island appearance	99.27%	32	4.8	3451
Housing quality	98.52%	7	4.63	3446
Access to outdoor recreation	98.47%	37	4.73	3491
Beach	98.33%	44	4.79	3447
Personal and property safety	97.87%	52	4.79	3480
Pristine natural environment	96.33%	16	4.6	3445
Natural resources	95.92%	38	4.64	3422
Other recreation activities	94.42%	30	4.38	3433
Proximity to comprehensive health care facilities	94.26%	41	4.53	3476
Bike/leisure paths	94.25%	41	4.55	3435
Culture and entertainment	93.52%	18	4.42	3488
Dining options	93.40%	37	4.39	3477
Cost of living	92.00%	24	4.31	3437
Sense of community	89.47%	46	4.27	3473
Ease of traffic	87.81%	26	4.18	3462
Shopping options	86.43%	33	4.07	3467
Gated community living	84.30%	19	4.2	3453

For the items below, please indicate the level of importance to YOUR QUALITY OF LIFE for each Hilton Head Island asset or amenity.

Answer Options	Important/Very important	No opinion	Rating Average	Response Count
Local residents	84.28%	74	4.09	3421
Festivals and special events	75.80%	58	3.86	3459
The tourism economy	74.00%	46	3.85	3431
Hilton Head Island Airport	71.49%	74	3.88	3434
Current level/amount of annual tourists	69.97%	75	3.74	3425
Volunteer opportunities	64.35%	93	3.57	3456
Affordable housing	60.94%	102	3.41	3469
Social services	60.02%	96	3.48	3425
Good K - 12 schools	54.61%	143	3.24	3470
Hotels/lodging facilities	53.14%	90	3.22	3462
Availability of jobs	50.12%	127	3.07	3463
Access to colleges or universities	39.82%	122	2.86	3452
Public transportation	36.04%	117	2.86	3252
Meeting facilities	33.97%	143	2.73	3452
Other (please specify)			170	170
answered question			3462	3462
skipped question			321	321

For the items below, please indicate for each Hilton Head Island asset or amenity the level of improvement NEEDED TO SUPPORT A HEALTHY ECONOMY.

Answer Options	Needs improvement/Needs major improvement	No opinion	Rating Average	Response Count
Availability of jobs	73.81%	566	2.85	3239
Hilton Head Island Airport	61.43%	282	2.78	3196
Ease of traffic	57.93%	61	2.69	3215
Affordable housing	54.66%	412	2.52	3231
Comprehensive health care options	53.66%	292	2.59	3227
K - 12 schools	46.51%	907	2.44	3225
The tourism economy	46.44%	257	2.4	3224
Public transportation options	41.75%	708	2.3	3113
Culture and entertainment options	39.53%	90	2.33	3227
Personal and property safety	39.39%	48	2.36	3234
The current level/amount of annual tourists	37.24%	254	2.24	3221
Live theater and concert options	36.84%	120	2.24	3206
Educational programs	36.16%	560	2.2	3162
Sense of community	34.73%	181	2.21	3219
Cultural activities (i.e. art exhibits, museums, etc.)	32.84%	134	2.18	3194

For the items below, please indicate for each Hilton Head Island asset or amenity the level of improvement NEEDED TO SUPPORT A HEALTHY ECONOMY.

Answer Options	Needs improvement/Needs major improvement	No opinion	Rating Average	Response Count
Hotels/lodging facilities	25.28%	339	2.04	3231
Meeting facilities	23.62%	782	1.97	3221
Bike/leisure paths	23.27%	68	2.02	3201
Festivals and special events options	22.05%	136	2	3202
Access to outdoor recreation	19.75%	71	1.97	3240
Beach	18.92%	42	1.94	3208
Dining options	17.74%	33	1.92	3212
Other water-based activities options (i.e. recreational boating, kayaking, jet skiing, etc.)	16.74%	499	1.83	3193
Access to colleges or universities	15.63%	483	1.81	3227
Fishing activities	15.15%	836	1.79	3192
Tennis options	7.94%	497	1.58	3180
Golfing options	5.58%	282	1.54	3202
Other (please specify)				172
answered question				3222
skipped question				561

On an annual basis, how often do you host friends/family on Hilton Head Island?

Answer Options	Response Percent	Response Count
1-2 times per year	12.50%	407
3-4 times per year	31.40%	1025
5-6 times per year	25.80%	841
7-8 times per year	13.80%	449
9-10 times per year	7.90%	257
11-12 times per year	3.10%	101
13 plus times per year	4.60%	151
I don't have friends/family visit me on Hilton Head Island	1.00%	32
answered question	3263	3263
skipped question	520	520

For the items below, please indicate how often you participate in the activities and/or visit the amenities with YOUR FRIENDS/FAMILY when they visit you on Hilton Head Island.

Answer Options	Every other day/Every day	Rating Average	Response Count
Beach combing/relaxing	74.76%	3.12	3186
Dining	60.90%	2.75	3174
Pool swimming	59.00%	2.77	3156
Bicycle touring	46.36%	2.49	3160
Golfing	34.38%	2.18	3156
Shopping	26.37%	2.27	3186
Other water-based activities (i.e. recreational boating, kayaking, jet skiing, etc.)	13.42%	1.81	3138
Tennis	12.93%	1.6	3117
Festivals and special events	8.52%	1.9	3123
Fishing activities	5.76%	1.43	3145
Cultural activities (i.e. art exhibits, museums, etc.)	4.58%	1.67	3125
Guided touring	4.27%	1.39	3115
Live theater and concerts	4.25%	1.62	3130
Tour Savannah	2.78%	1.77	3027
Tour Bluffton	2.65%	1.54	3129
Tour Beaufort	2.08%	1.61	3128
Educational programs	1.60%	1.27	3128
Other (please specify)			127
answered question			3198
skipped question			585

For the items below, please indicate which Hilton Head Island asset or amenity is MOST ATTRACTIVE TO ISLAND VISITORS.

Answer Options	Attractive/Very attractive	No opinion	Rating Average	Response Count
Beach	98.43%	56	4.79	3110
Dining options	95.57%	36	4.46	3080
Bike/leisure paths	93.09%	82	4.43	3048
Golfing	92.12%	170	4.52	3075
Bicycling touring	86.73%	234	4.26	3068
Other water-based activities (i.e. recreational boating, kayaking, jet skiing, etc.)	79.38%	324	3.93	3059
Proximity to Savannah	78.61%	211	3.87	3044
Tennis	77.44%	399	4.04	3023
Hotels/lodging facilities	76.11%	345	3.88	3070
Festivals and special events	70.90%	270	3.79	3067
Shopping options	69.72%	89	3.65	3074
Hilton Head Island Airport	63.34%	244	3.64	3062

For the items below, please indicate which Hilton Head Island asset or amenity is MOST ATTRACTIVE TO ISLAND VISITORS.

Answer Options	Attractive/Very attractive	No opinion	Rating Average	Response Count
Live theater and concerts	63.02%	276	3.62	3072
Proximity to Beaufort	61.25%	331	3.47	3059
Fishing activities	60.45%	693	3.51	3070
Cultural activities (i.e. art exhibits, museums, etc.)	59.46%	287	3.53	3057
Proximity to Bluffton	50.04%	397	3.23	3051
Guided touring	43.80%	601	3.23	3037
Meeting facilities	42.38%	965	3.24	3058
Educational programs	28.18%	718	2.89	3025
Public transportation	14.32%	706	2.37	2933
Other (please specify)				87
answered question				3131
skipped question				652

For the items below, please indicate for each Hilton Head Island asset or amenity the LEVEL OF ECONOMIC RETURN TO THE COMMUNITY.

Answer Options	Provides strong/greatest economic impact	No opinion	Rating Average	Response Count
Golfing	93.63%	140	4.56	2949
Dining	91.27%	99	4.27	2973
Beach	89.24%	123	4.48	2975
Hotels/lodging facilities	88.49%	160	4.2	2983
Shopping	66.95%	117	3.78	2976
Tennis	65.27%	316	3.8	2942
Meeting facilities	59.53%	454	3.6	2962
Hilton Head Island Airport	57.49%	239	3.59	2937
Bicycle touring	54.19%	252	3.54	2937
Festivals and special events	49.23%	236	3.46	2958
Other water-based activities (i.e. recreational boating, kayaking, jet skiing, etc.)	48.92%	304	3.45	2943
Proximity to Savannah	46.38%	270	3.32	2935

For the items below, please indicate for each Hilton Head Island asset or amenity the LEVEL OF ECONOMIC RETURN TO THE COMMUNITY.

Answer Options	Provides strong/greatest economic impact	No opinion	Rating Average	Response Count
Hospitals and medical services	43.28%	281	3.31	2943
Live theater and concerts	35.84%	247	3.19	2962
Fishing activities	33.54%	560	3.11	2954
Cultural activities (i.e. art exhibits, museums, etc.)	29.99%	253	3.04	2951
Proximity to Beaufort	29.20%	349	2.89	2931
Guided touring	26.40%	470	2.99	2921
Proximity to Bluffton	24.39%	368	2.75	2931
Educational programs	13.93%	546	2.59	2915
Public transportation	12.69%	611	2.35	2826
Other (please specify)				69
answered question				2998
skipped question				785

For the items below, please indicate the level of expectation met for each aspect of Hilton Head Island SINCE FIRST BECOMING AN ISLAND RESIDENT.

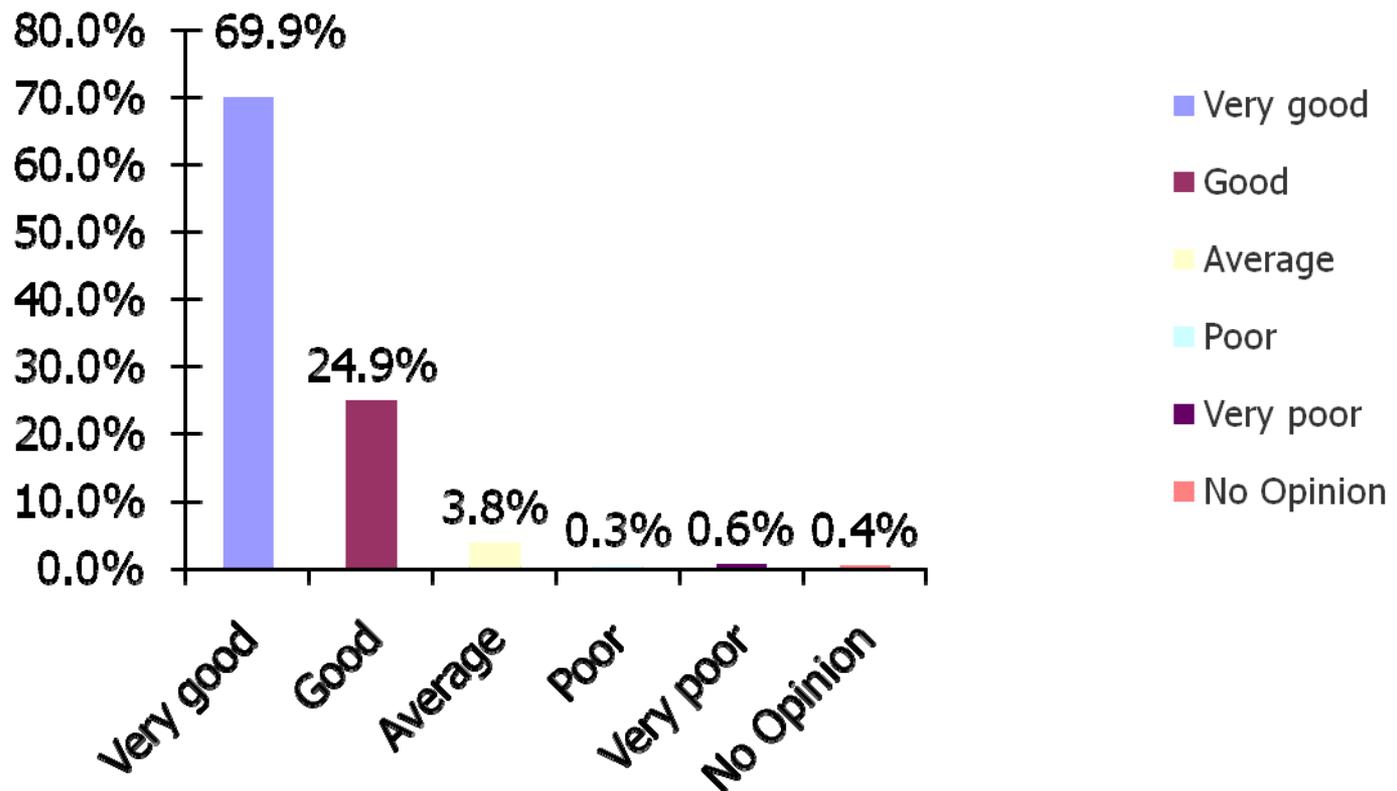
Answer Options	Exceeded/Greatly exceeded my expectations	No opinion	Rating Average	Response Count
Beach	55.20%	12	3.69	2965
Dining options	51.39%	8	3.5	2962
Bike/leisure paths	49.32%	68	3.55	2949
Natural resources	44.55%	86	3.49	2950
Island appearance	44.23%	8	3.39	2961
Gated community living	41.77%	83	3.4	2949
Access to outdoor recreation	40.60%	37	3.41	2988
Volunteer opportunities	36.23%	678	3.31	2944
Festivals and special events	27.39%	215	3.09	2950
Sense of community	27.26%	158	3.02	2968
Personal and property safety	25.05%	29	3.06	2991
Culture and entertainment	22.28%	136	2.94	2981
Hotels/lodging facilities	20.31%	421	3.1	2972

For the items below, please indicate the level of expectation met for each aspect of Hilton Head Island SINCE FIRST BECOMING AN ISLAND RESIDENT.

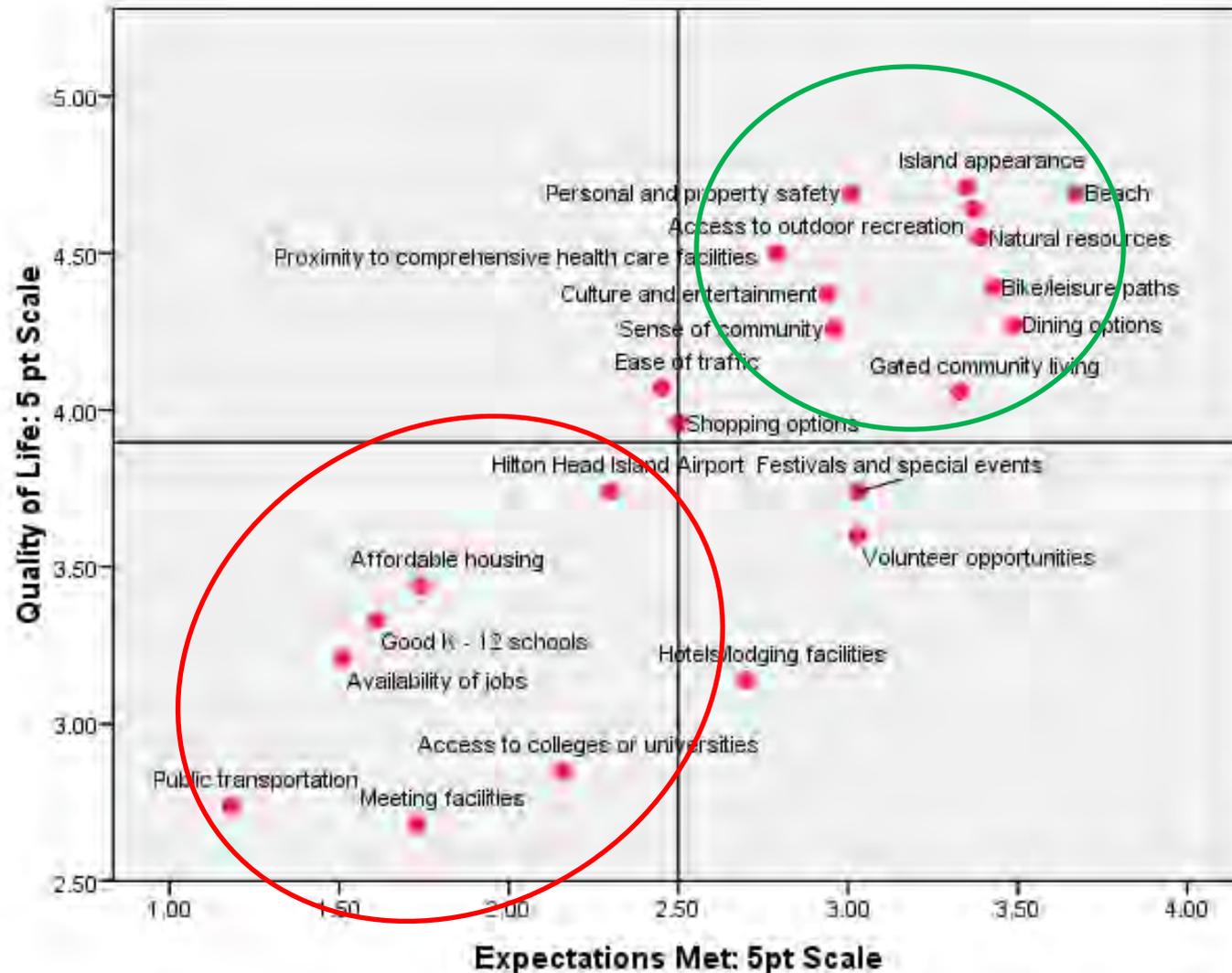
Answer Options	Exceeded/Greatly exceeded my expectations	No opinion	Rating Average	Response Count
Proximity to comprehensive health care facilities	18.94%	159	2.82	2978
Shopping options	17.69%	22	2.66	2967
Ability to maintain my property value	16.67%	56	2.51	2983
Access to colleges or universities	16.16%	1011	2.92	2973
Hilton Head Island Airport	12.89%	328	2.52	2958
Meeting facilities	11.56%	1263	2.86	2933
K - 12 schools	11.30%	1390	2.52	2957
Ease of traffic	5.15%	44	2.37	2976
Affordable housing	3.22%	888	2.34	2967
Public Transportation	3.01%	1375	2.14	2869
Availability of jobs	2.36%	1280	2.22	2973
Other (please specify)				88
answered question				2973
skipped question				810

Over 90% rated their quality of life as Good or Very Good

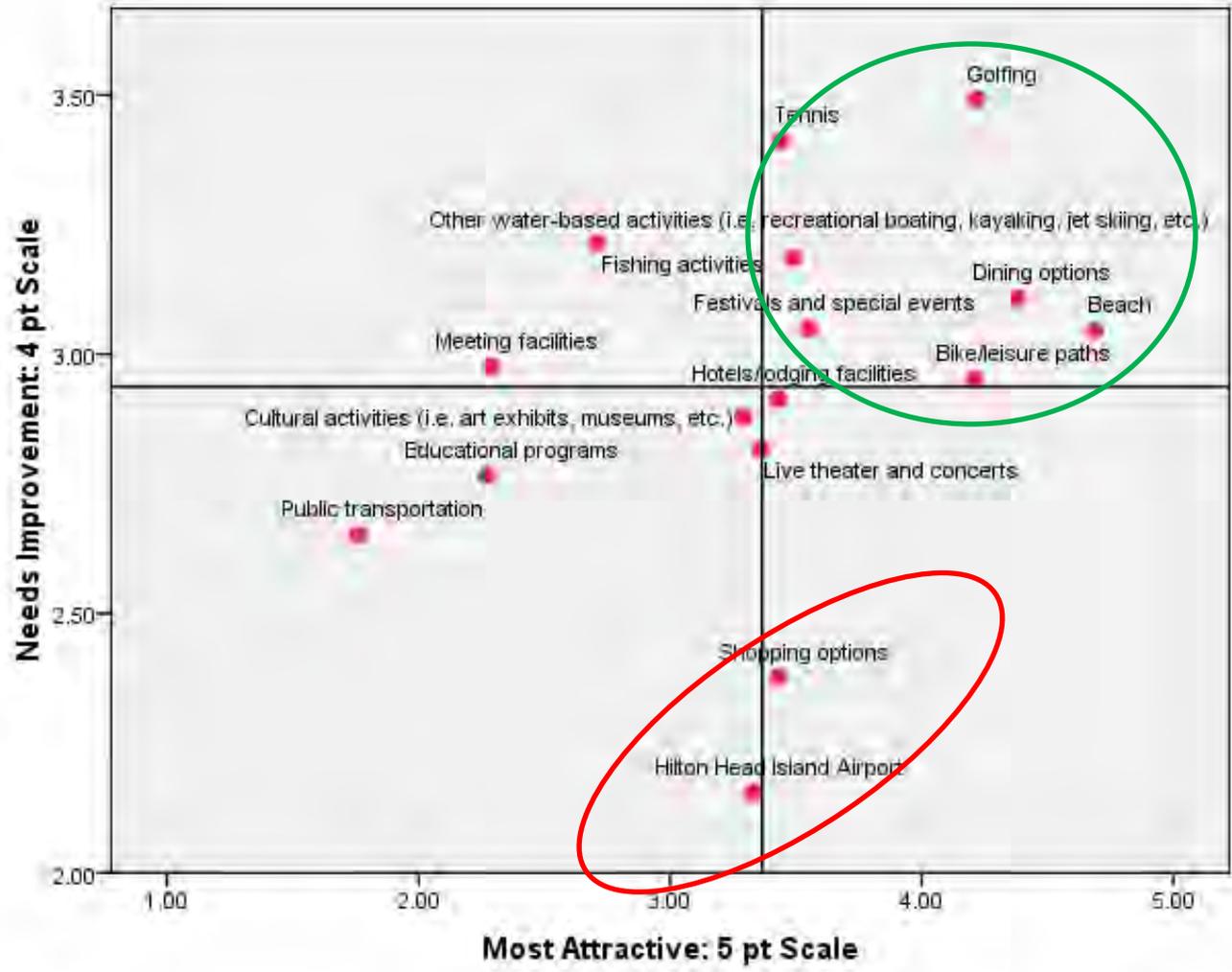
Overall, how would you rate your quality of life here on Hilton Head Island?



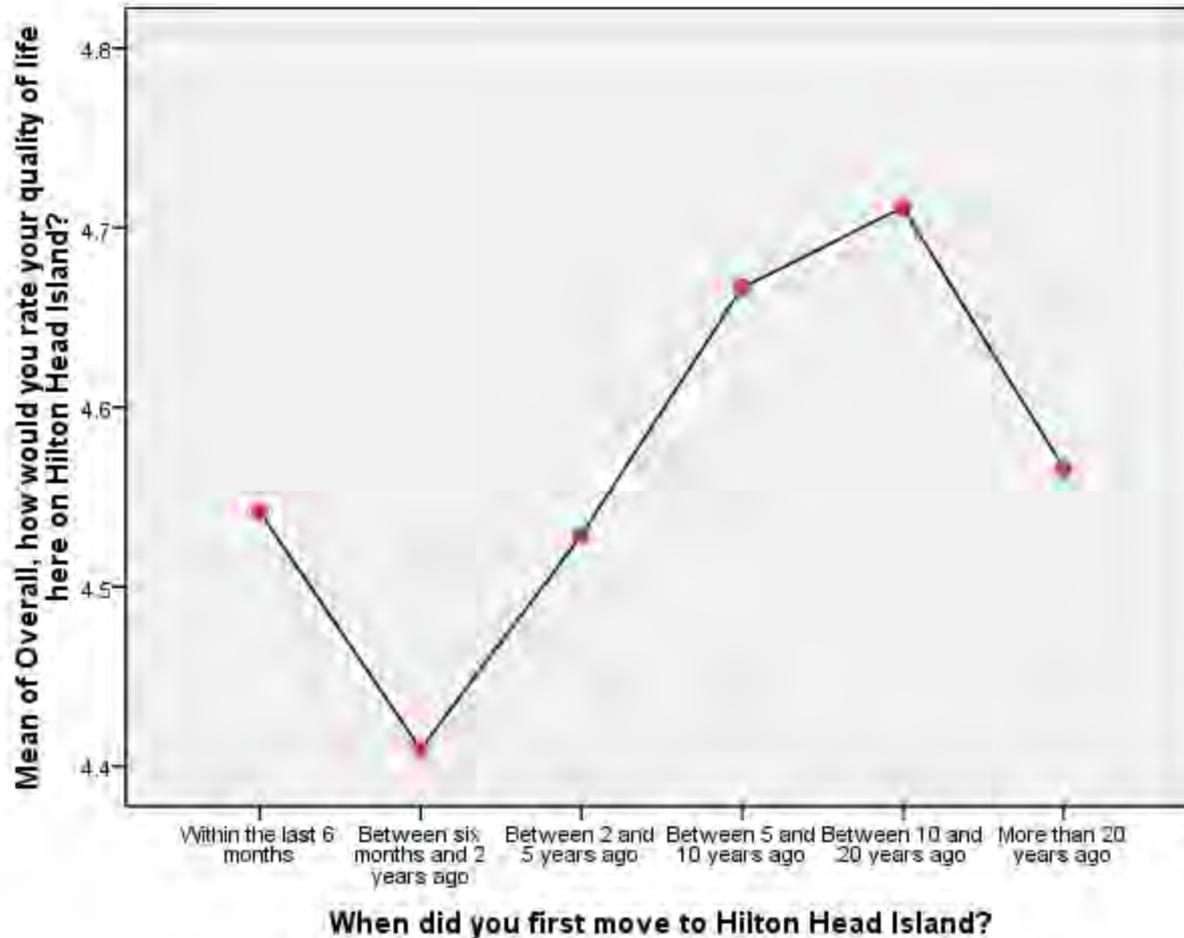
HHI Fulltime Residents: Plotting Quality of Life by Expectations Met



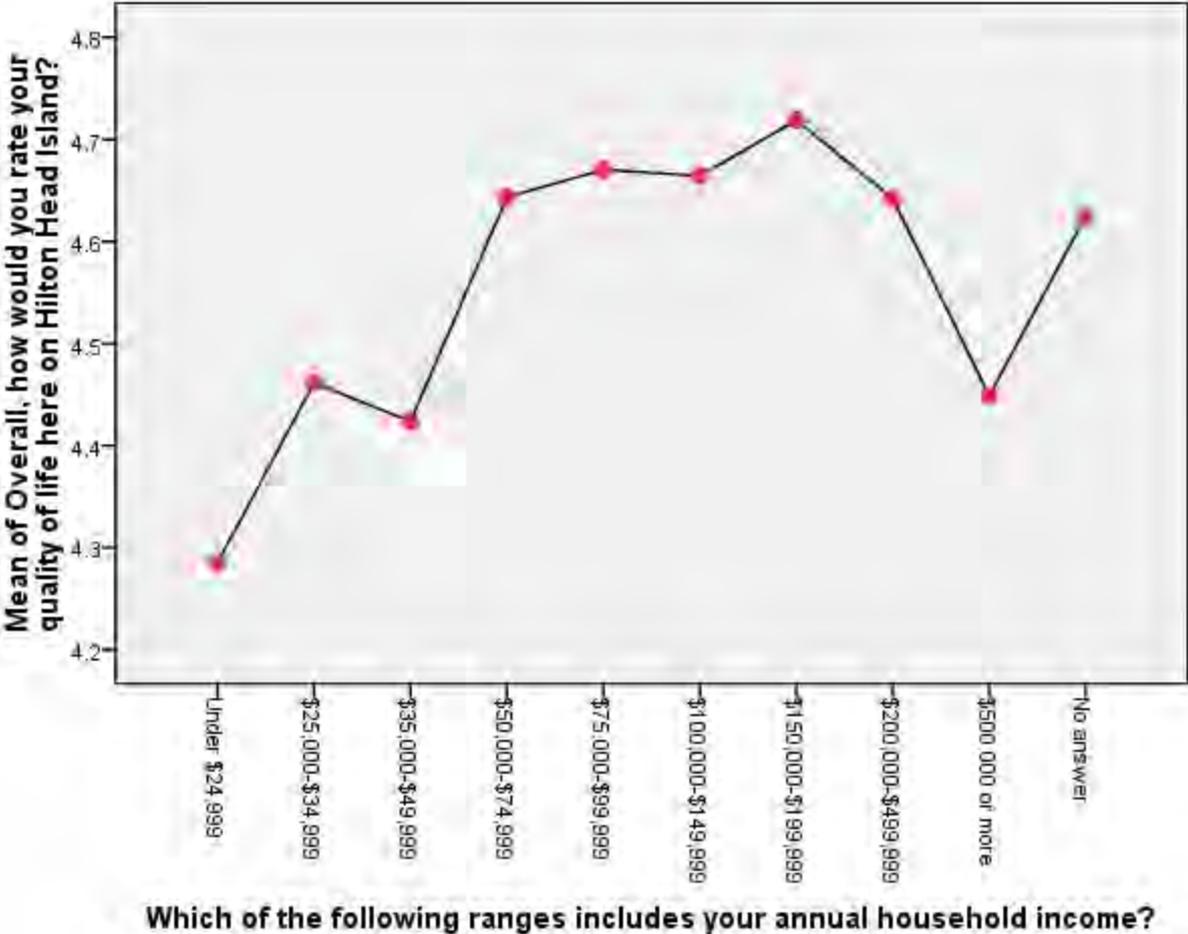
HHI Fulltime Residents: Plotting Needs Improvement by Most Attractive



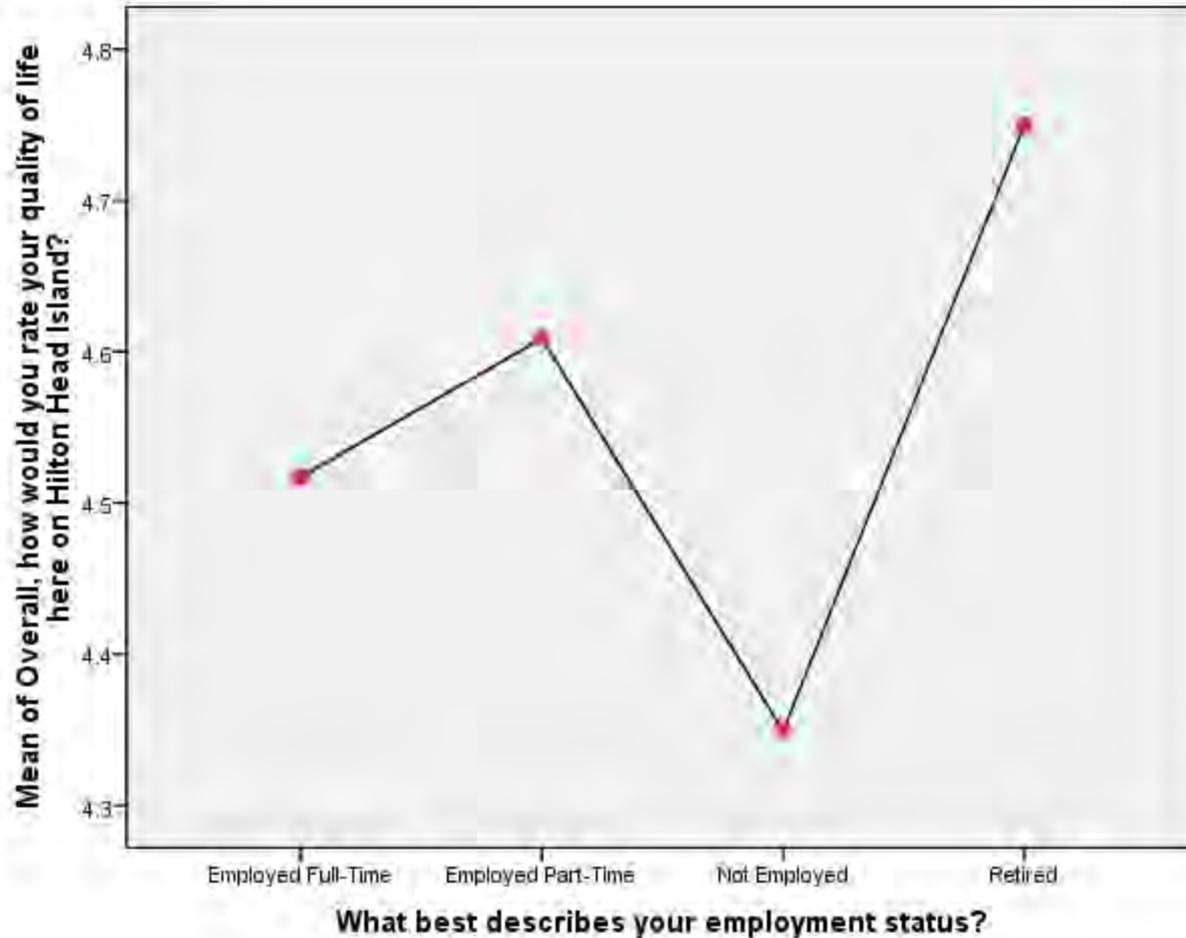
Fulltime Residents Plotting Quality of Life by Years Living on HHI: Significant Difference Among Populations



Fulltime Residents Plotting Quality of Life by Income: Significant Difference Among Populations



Fulltime Residents Plotting Quality of Life by Employment Status: Significant Difference Among Populations



Recommendations

- Since most residents indicated that their first visit to the island was tourism related, HHI must make a concerted and consistent effort to educate the public about the importance of the tourism industry and its impact on potential new residents.
- The assets of HHI that are most important to residents are all environmentally related. Therefore, when making future decisions HHI must always consider how the public perceives the decision's impact on the environment.
- “Availability of Jobs” needs improvement to support a healthy economy. HHI should consider how to either enhance the existing volume of business demand or expand the current economy in order to increase or attract more jobs.
- If lodging quality is a concern of the HHI tourism industry, the industry must convince the residents that it is a issue due to 25% of the population indicating that hotels/lodging need improvement to support a healthy economy.

Recommendations

- If the existing meetings/convention market is to be expanded for HHI, the tourism industry must convince the residents that “Meeting Facilities” need improvement because only 23% of the population indicated that there was a need for improvement.
- The Beach is one of the more important assets contributing to a resident’s quality of life and is an asset that is most utilized when friends/family visit. Therefore, the beach renourishment program must be sustained and a constant priority.
- Residents feel that “Golf,” “Tennis,” “Fishing,” “Festivals and Special Events,” “Dining,” and “Beach” need the least improvement and are the most attractive to visitors. These assets are perceived by the residents to be the best of HHI. However, “Shopping Options” and “HHI Airport” need improvement and are less attractive. Therefore, the community should explore ways to enhance the shopping options as well as HHI airport.

Recommendations

- The assets that are most important, most utilized, and that have exceeded the expectations of the residents are the same items that are used by visitors. Consequently, should visitor volume decrease there will be a negative business impact on certain assets that the residents use. For example, if visitor demand for local dining decreases, local dining options will eventually decrease because restaurant owners will decide to “walk away” from an unprofitable business. Therefore, the circumstance has an impact on a resident’s quality of life as well as reduces their satisfaction with dining options. HHI must create and maintain a public relations strategy that continues to inform the residents of the importance of the tourism industry. This strategy should be developed for both the public and private sectors and targeted to the general population.