

Market Overview: The State of Tourism

SUPPLEMENT TO EXECUTIVE SUMMARY OF FINDINGS



Summary

Isle of Palms sits in a large, drive-to beach market that is growing by value rather than by crowds, while the region around it grows by population. Five findings define the tourism environment the brand will enter:

The market is big, beach-first and arrives by car.

South Carolina draws about 30M domestic visitors a year. Nearly 9 in 10 trips are made by car and the beach is the top activity.

Charleston grows by spending, not visitor growth.

From 2021 to 2025, Greater Charleston's visitor count rose 9% while tourism's economic impact rose 35% (to \$14.35B).

The region is filling in.

The tri-county area has added ~90,000 residents since 2020. That growth, not overnight tourism, is the pressure the City names as its top strategic priority.

Isle of Palms holds an outsized, premium and highly seasonal share of the lodging market.

It has 41% of the lodging in Charleston's island and beach communities, runs above 90% occupancy in July and near 30% in December, and relies on visitor-linked revenue for a third of its budget.

Volume is softening while rates rise.

Statewide vacation-rental nights sold fell in early 2026 as nightly rates climbed, and Isle of Palms' state accommodations-tax receipts have been flat this fiscal year.

The Carolina Coast

A DRIVE-TO, BEACH-FIRST MARKET

The Carolinas coast runs on overnight beach trips taken by car, concentrated in summer and heavy with repeat visitors and families. The two states' visitor profiles tell the same story:

MEASURE	SC STATEWIDE	NC COAST
ANNUAL VISITORS	~30M domestic	11.2M
TRIPS WITH OVERNIGHT STAY	81%	80%
AVERAGE OVERNIGHT STAY	4.0 nights	4.1 nights
ARRIVE BY CAR	89% of trips	91% of visitors
BEACH AS TOP ACTIVITY	42%	71%
TRAVEL WITH CHILDREN	26% of trips	40% of parties
SUMMER SHARE	33% of all trips	41% of overnights

South Carolina's overnight visitors come mostly from next door: North Carolina (22%), South Carolina itself (21%), Georgia (9%), Florida (6%) and Virginia (5%). The state's out-of-state leisure segment alone totals about 10.8M visitors, 62% of whom go to the beach.

Volume is now softening while prices rise: From January to May 2026, South Carolina vacation-rental nights sold fell 5.4% while the average nightly rate rose 4.0% (to \$290). Hotel occupancy slipped 1.1% as hotel rates rose 2.0%. State accommodations-tax collections in the coastal counties grew just 0.9% in fiscal 2024–25.

CHARLESTON: GROWING BY VALUE OVER VOLUME

Charleston set a record \$14.35B in tourism economic impact in 2025 while its visitor count barely moved. Overnight visitors rose 0.3% to 7.91M, but spending per adult per trip rose 9.7% to \$1,212.

GREATER CHARLESTON	2021	2025	CHANGE
OVERNIGHT VISITORS	7.23M	7.91M	+9%
ECONOMIC IMPACT	\$10.62B	\$14.35B	+35%
SPENDING PER ADULT PER TRIP	\$962	\$1,212	+26%
LODGING SALES	\$1.29B	\$1.61B	+25%

Tourism now accounts for about 23.6% of regional sales and more than 55,500 jobs. The College of Charleston's Office of Tourism Analysis describes the pattern plainly: *the destination is attracting higher-value visits while volume grows gradually.*

Hotels show the same shape as occupancy has held near 70% since 2022 while the average daily rate climbed from \$179 to \$188, and hotel room nights sold dipped 0.9% in 2025. Charleston's calendar peaks regularly in spring and fall with occupancy topping out in April 2025 at 82.6% and rates run highest in April (\$224) and lowest in August (\$170).

The contrast with the Grand Strand is sharp. In 2024, Charleston-area hotels averaged \$182 a night at 70.2% occupancy; Myrtle Beach-area hotels averaged \$133 at 54.5%.

Charleston's visitors are focused on culture, history and historic sites leading the destination's most attractive assets, with beaches and waterfront also among them. In the most recent visitor survey, 89% of parties traveled without children and 69% were first-time visitors. About 20% visited Isle of Palms during their trip, but only 4% stayed there. Top origin markets outside South Carolina include Charlotte, Atlanta, New York, Raleigh and Orlando, and Charleston International handled a record 6.34 million passengers in 2025 (+42%).

A region filling in tri-county.

The mainland around Isle of Palms keeps filling in. The tri-county area has gained roughly 90,000 residents since 2020, about 11%:

COUNTY	2025 ESTIMATE	GROWTH SINCE 2020
CHARLESTON	~436,200	+6.8%
BERKELEY	~274,700	+19.5%
DORCHESTER	~178,400	+10.4%

Charleston County alone is about 25% larger than it was in 2010: Nearby residents drive the state's day-trip market – about 19% of South Carolina trips are day trips (and South Carolinians make 54% of them).

IOP is a small island whose growing mainland neighbors reserve for day use: With over 4,000 year-round residents, and its population swells to roughly 20,000 on major summer holiday weekends. Each added mainland beach day brings parking and traffic demand but no lodging tax.

The top priority of the City's 2022–2027 Strategic Plan is to manage pressure from population growth in surrounding communities – to reduce tourism's impact on residents, improve traffic flow, and ensure day-visitor costs are offset by day visitors. The IOPThrives! Community Enrichment Plan frames the same challenge as regional population and tourism growth and its first focus area is seasonal parking and traffic. In the 2026 community survey, parking (29%) and traffic (21%) were the problems respondents named most (split among three types of respondents: residents, visitors, and businesses).

Regional Audience Demographics

Three distinct profiles surround Isle of Palms: an older, affluent island community; a younger, working-age region next door; and mid-life, higher-income coastal visitors who travel with family.

RESIDENTS	ISLE OF PALMS	CHARLESTON COUNTY
POPULATION	4,347 (2020 Census)	~437,200 (2026 estimate)
MEDIAN AGE	54.6	39.4
PER CAPITA INCOME	~\$157,000	~\$66,500

IOP residents are ~15 years older than the county's and earn more than twice as much per person. About 59% of island residents are 50 or older, 32% are 65 or older, and 16% are under 18. The island's median age has edged down since 2020 (from 56.2).

The mainland next door is younger and working-age. Charleston County's median household income is about \$99,800 and 53% of adults hold a bachelor's or graduate degree. Its share of residents aged 55+ (30.9%) sits below the state's (32.5%), and its share of prime working-age adults (25 to 54) is higher than both South Carolina's and the nation's. That runs against the statewide trend: South Carolinians aged 65+ rose from 14% of the population in 2010 to 19% in 2020, and are projected to reach 23% by 2030.

VISITORS WHO TRAVEL THE COAST

- Coastal beach visitors are mid-life families. North Carolina's coastal overnight visitors average 46 years old, and 66% are married. Their average household income is \$100,000. Forty percent of travel parties include children, and parties average 2.9 people.
- Statewide trips are smaller and less family-heavy. Across all South Carolina trips, parties average 2.2 people, and 26% include children.
- Charleston's cultural visitor is older and adult-only. People who requested the Charleston visitors guide and then visited have a median age of 61. 79% are married, 74% hold a college degree and 43% are retired. More than half earn \$100,000 or more, and 89% traveled without children.
- IOP visitors are loyal and family-minded. Among visitor respondents to the City's 2026 survey, 81% visit often and 48% name the family-friendly atmosphere as what makes the island special. The survey did not collect age or incomes. No island-specific visitor demographics exist yet.

Taken together, the coastal beach visitor looks more like the island's growth audience than Charleston's own visitor does. They are younger than Charleston's cultural traveler, likelier to bring children, and affluent enough for premium lodging.

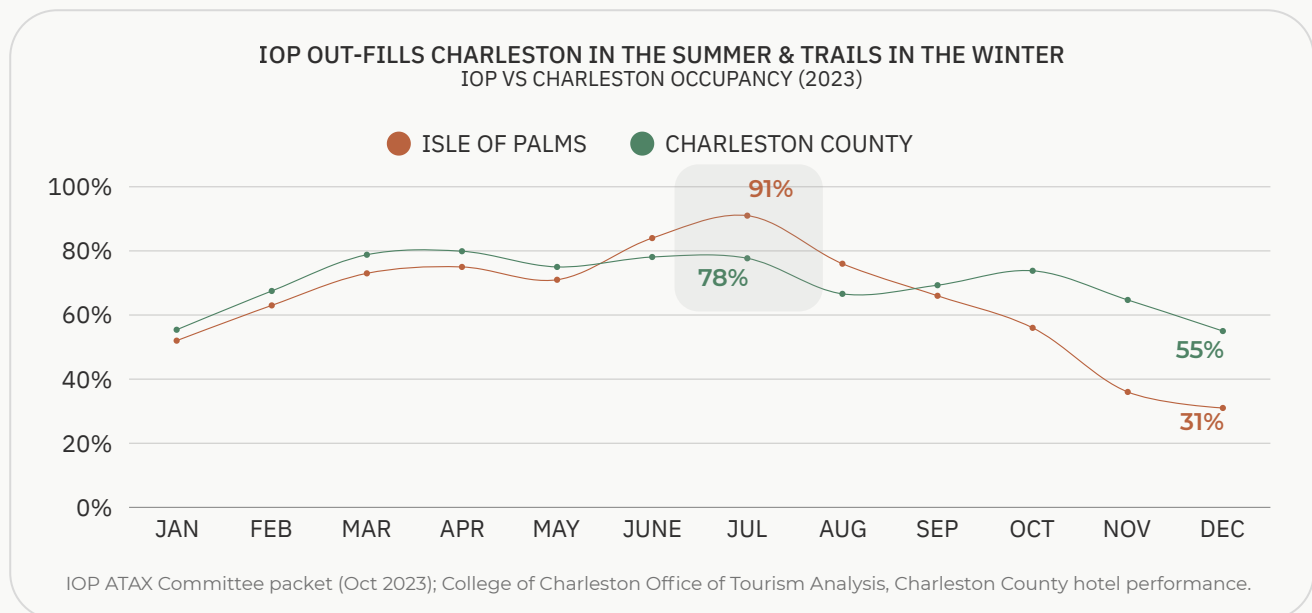
Where Isle of Palms fits in the Market

IOP holds an outsized, premium share of the region's beach lodging, but fills it only in summer. Its 2,166 lodging units (1,633 short-term rentals and 533 hotel rooms) give it a larger footprint than its size suggests.

IOP'S SHARE OF CHARLESTON-AREA LODGING	SHARE
ISLAND AND BEACH COMMUNITIES	41.4%
LUXURY MEETING-PROPERTY ROOMS	16.5%
ALL CHARLESTON-AREA LODGING	8.2%
FULL-SERVICE HOTEL ROOMS	8.1%

Rentals are woven into the residential fabric: 1,784 of the island's 4,627 dwellings (39%) held a STR license in 2024-25. Rates are premium on IOP with vacation rentals averaging \$818 a night from January to August 2023 (74% occupancy). Rates ranged from \$244 in January to \$1,193 in July. Even the island's lowest-rate month topped the Grand Strand's 2024 vacation-rental average of \$215. Short-term rental rates rose another 6.4% in fiscal 2025.

Demand is concentrated and IOP rentals out-fill Charleston's hotels only in June, July and August. From October through December, the island ran at 31-56% occupancy while Charleston hotels held 55-74%.



Visitor-linked revenue (accommodations tax, beach preservation fee, hospitality tax and parking) makes up \$10.8M (33%) of the City's \$32.7M FY26 budget. Property taxes supply 17%. The City's state accommodations-tax reached \$3.79M FY25 (nearly 2X FY19, but have been flat so far in FY26). Explore Charleston's FY26 VRBO campaign for the island generated \$7.7M in rental revenue.

The Coastal Competitive Set

The region's beach destinations follow three models: high-volume value, private resort, and public day-trip beach. Isle of Palms sits between them – pairing a public beach town with a full resort at Wild Dunes.

DESTINATION	MODEL	SCALE	LODGING
GRAND STRAND	High-volume family value	18.2M visitors spending \$13.2B	55% hotels + 41% rentals; \$174 ADR
HILTON HEAD ISLAND	Resort island + public beaches	~2.67M visitors	Not compared here
KIAWAH ISLAND	Private, planned resort	~300,000 visitors a year	350 hotel rooms + 1,351 rentals
FOLLY BEACH	Public day-trip beach town	~10K summer day visitors + 15K-20K peak	Rental-led
ISLE OF PALMS	Public beach town plus resort	4K residents + 14K summer (20K peak)	2,166 units; rentals \$818 a night Jan–Aug 2023

Two key patterns stand out: The Grand Strand wins on volume and affordability, and its lodging occupancy is well below Charleston's. Kiawah controls access and volume through private, planned development yet still reports strain on its single access road at peak. Isle of Palms carries more lodging than Kiawah and a public beach that absorbs regional day use like Folly's.

What the Market Tells Us

The market data points to six conditions the brand strategy will need to work within.

Value over volume is the regional model, and Isle of Palms already prices at the top of it.

Charleston's economic impact grew nearly four times faster than its visitor count since 2021. Isle of Palms rentals command several times the regional average rate.

The pressure comes from next door.

The growing mainland drives day use, parking and traffic, which carry costs for the island without lodging revenue.

The calendar, not capacity, is the gap.

IOP's lodging runs full in summer and roughly half-empty or less from October through January, while Charleston's own demand peaks in spring and fall.

Nights are flattening while rates rise.

Statewide vacation-rental nights sold fell in early 2026 and the island's accommodations-tax receipts are flat this fiscal year.

Charleston's visitors reach the island but rarely stay.

One in five visits Isle of Palms during a Charleston trip; one in 25 stays there.

The growth audience is a mid-life family (not Charleston's visitor).

Coastal visitors average 46 and 40% travel with children. Charleston's visitor median age of 61 and mostly travel without children (89%). The island's best overnight prospect is the Carolina's beach family than Charleston's cultural traveler.

HOW THIS SHAPES THE BRAND

These conditions give the brand work its guardrails and its proof points. Each one feeds a specific part of what comes next:

Brand strategy: The market makes the business case for value over volume and IOP already has the premium lodging base to compete. Strategy can aim for more valuable, longer stays rather than more visits (with October-January as the growth window).

Positioning: IOP competes between the private resort islands and the public day-trip beaches next to a cultural city whose visitors rarely stay. The position has to give visitors a reason to stay on the island, not just visit from Charleston.

Messaging: The brand message can be aimed at drive-market families who plan months ahead, including for spring and fall. Practical information for the growing regional day-use audience can stay

clear and useful without inviting more peak-day volume.

Visual identity: The identity needs to read as a premium, family-oriented island with a residential character. It should stand apart from Charleston's history-and-food image, the Grand Strand's high-volume energy and the party image the City wants to move past. It also has to work in every season, not just summer beach scenes.

Channels: The data points to the drive markets that already produce overnight visitors, led by the Carolinas and Georgia. It also points to the planning window before summer (January- April). Specific channel choices will come in the channel plan.

Ultimately, the market gives the brand a clear job defined as attracting higher-value, longer stays across more of the year while protecting the island experience that makes those stays worth the price.

Competitor Profiles

Eight coastal destinations compete for the visitors Isle of Palms wants most: families planning a longer, higher-value stay. These competitors were selected from the highest value regional and audience-adjacent tourism and search behavior research. Search demand, website analytics, and competitor visibility showed which destinations intercept the audiences IOP needs to reach, and sorted them into two groups of four:

Regional competitors – Folly Beach, Kiawah Island, Seabrook Island and Wild Dunes. These are the Charleston-area alternatives. They compete for the same Charleston beach trip and are promoted by the same regional visitors bureau, *Explore Charleston*.

Audience-adjacent competitors – Hilton Head Island, Pawleys Island, Emerald Isle and Surfside Beach. These family-beach destinations within a day's drive already court the overnight family audience with well-defined stays. Of all of them, Hilton Head is the destination searchers most often weigh directly against IOP.

HOW TO READ EACH PROFILE

Each profile reviews competitor positioning, target audience, value proposition, marketing strategy, and how the competitor intercepts IOP audiences. It then covers our analysis of how the destination markets itself across web, social and paid channels, how they are presented (as municipalities, tourism destinations and/or both), and if they on brand or off. A short summary follows on how the brand connects with its audience and where the destination sits on the competitive positioning map.

THE COMPETITIVE SET AT A GLANCE

DESTINATION	MODEL	SCALE	LODGING
FOLLY BEACH	Regional	Lived-in beach community	Recognizable voice, aimed at home & family
KIAWAH	Regional	Resort & recreation depth (gated)	One site that serves residents, visitors and businesses; recreation planned by age
SEABROOK	Regional	Quiet residential stay	Belonging offered publicly, clear access rules
WILD DUNES	Regional (on IOP)	Resort & recreation depth	Turn resort demand into island demand under an IOP umbrella
HILTON HEAD	Audience-adjacent	Beach-house stay, resort	Planning depth, one line used everywhere
PAWLEYS	Audience-adjacent	Beach-house stay	Official visitor voice before someone else
EMERALD ISLE	Audience-adjacent	Beach-house stay	One site for all audiences; shows full week
SURFSIDE	Audience-adjacent	Lived-in beach community	Partner consistency; make "family" specific

Folly Beach, SC

| **Regional** • “Charleston’s Beach Town” • “The Edge of America”

POSITIONING (KNOWN FOR)	A laid-back, active beach town with a social edge. Folly sells itself as “one of America’s last true beach towns” and a “come-as-you-are kind of beach.” Surf, the pier, festivals and nightlife sit alongside family fun. It is the most personality-driven brand in the set.
TARGET AUDIENCE	Families and social groups, beach-house renters and day-trippers. The visitor site speaks to families, dog owners, surfers, anglers and wedding couples at once. Its 11 itineraries run from “Rainy Day with Kids” to “Girls Weekend.” Day use is heavy: 8,000 to 11,000 people on a typical summer day.
VALUE PROPOSITION	Beach-town energy and recreation within a Charleston trip. The island is public, ungated and close to downtown, with surfing, the pier, boat trips and a steady event calendar.
MARKETING STRATEGY	Activity-led discovery: Stay, Eat, Play and Explore navigation, itineraries, festivals, weddings, a mobile app and an Instagram-led social program. Paid Meta ads were running in October 2026 with a fall stay message, “Find Your Fall on Folly Beach.” Most signature events fall between early fall and early spring.
HOW THEY INTERCEPT IOP	Wins Charleston family and social beach-house discovery. Folly leads the Google AI Overview for Charleston beach houses, and searchers already compare IOP and Folly directly. “Folly beach bars” draws about 2,067 searches a month in summer, which keeps a party association attached to Charleston’s beaches.

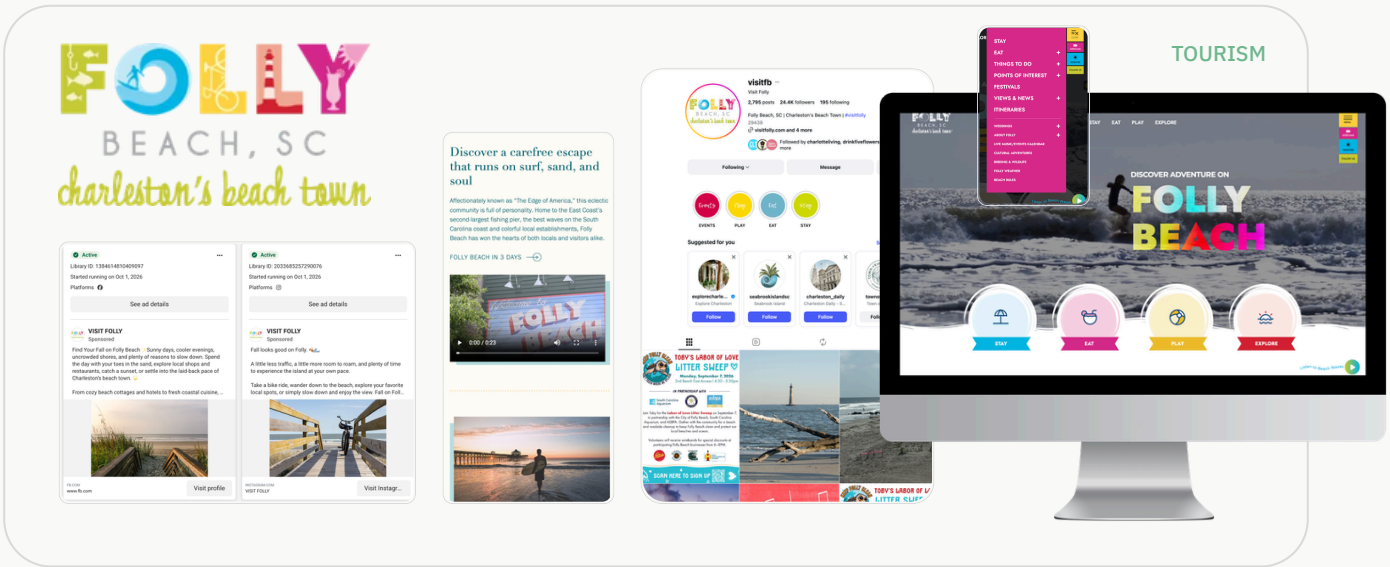
MARKETING OVERVIEW

The visitor brand lives at visitfolly.com, separate from the City’s site. The City site handles residents, short-term rentals and emergencies, and the City posts on Facebook only.

The visitor identity is loud and hand-made: a multicolor illustrated word-mark, “charleston’s beach town” script, and bright pinks and teals.

Instagram mixes events, beach clean-ups, lighthouse/sunset photos, illustrated art and nightlife.





HOW EXTERNAL PARTNERS PROMOTE THEM

On brand. Explore Charleston leads with “a carefree escape that runs on surf, sand, and soul” and repeats “The Edge of America,” the pier and the surf. It adds more history and wildlife than Folly’s own site, but Folly’s personality carries through intact.

BRAND-AUDIENCE CONNECTION

Strong & self-selecting. The voice and visuals tell a visitor within seconds whether Folly is their kind of place. Where other destinations promise a relaxed family stay, Folly promises true “chill” for teens, young adults and laid-back beachgoers. The energy that draws social groups makes the quiet family stay harder to own.

POSITIONING

Lived-in beach community, edging into the Charleston connection. Folly owns the lived-in beach town, but lacks the resort/recreation depth or a polished/complete stay.

TRADITIONAL BEACH-HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- IOP needs a voice as recognizable as Folly’s, aimed at home and family.
- Folly is already claiming fall. IOP’s off-season story must be *more* specific than “fewer crowds” (ie. name the reasons to come, such as the quiet island, the dock, fishing and wildlife).

Kiawah Island, SC

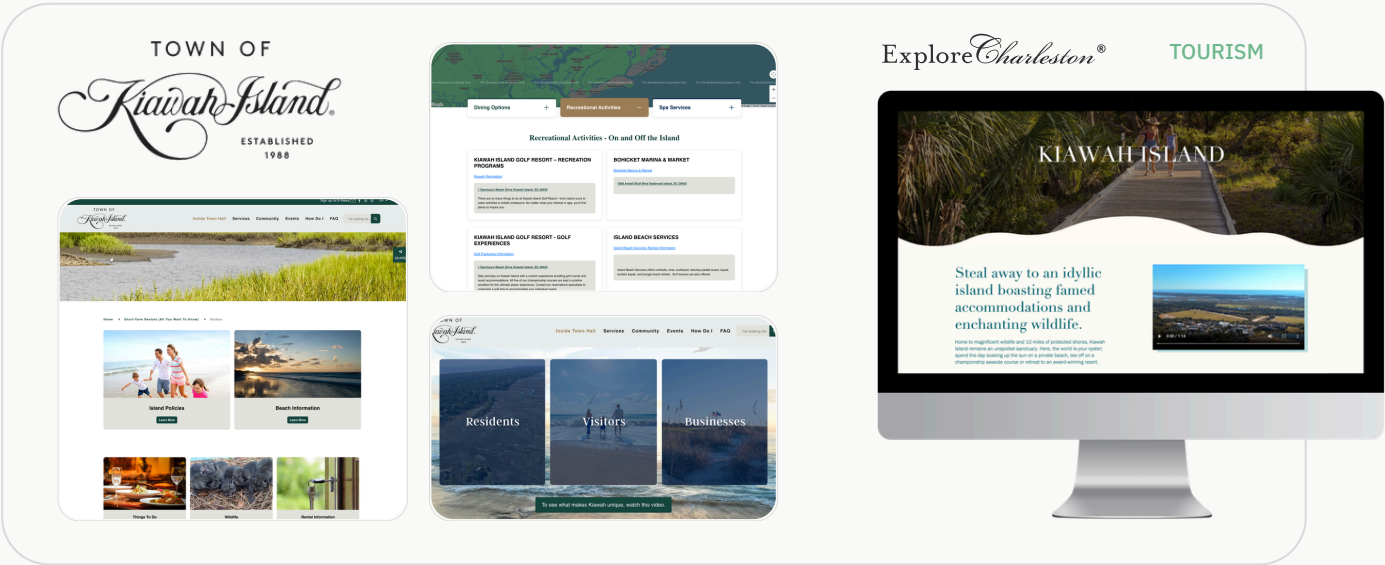
Regional • “The golf resort island” • “Welcome to Our Island Paradise”

POSITIONING (KNOWN FOR)	A golf-first luxury resort island, with recreation and nature secondary. The tourism brand is the Kiawah Island Golf Resort: “your destination for luxury golf and beach vacations near Charleston,” anchored by the Ocean Course and the 2031 PGA Championship. The Town runs the municipality website only with tourism routed through Explore Charleston and the resort.
TARGET AUDIENCE	Families, multigenerational groups, golfers, and resort and luxury travelers, plus weddings, meetings and corporate retreats. The Town’s own visitor material is a rulebook for rental guests covering lighting, occupancy, parking, pets and wildlife.
VALUE PROPOSITION	A complete island vacation behind a gate – hotel, villas, private homes, five golf courses and about 10 miles of shoreline, kids’ camps, dining and holiday programs in one controlled setting. Public beach access is limited to Beachwalker County Park.
MARKETING STRATEGY	Stay-first conversion. The resort drives booking through its Stay, Golf, Dine, Play, Meet and Renew sections, plus seasonal reasons to return such as Fall Golf, Thanksgiving and holiday events. The Town sends its 30% tourism-promotion share to Explore Charleston, \$902,870 in FY2025-26, and reviews ATAX marketing requests from the resort and other businesses.
HOW THEY INTERCEPT IOP	Captures family stay intent through deep resort and rental planning. Recreation is filtered by age and interest, and “Kiawah island vacation rentals” averages about 2,800 searches a month in summer, with a rebound in November.

MARKETING OVERVIEW

Three voices speak for one island, splitting the resident, visitor, and business experience directly on the homepage. Its Instagram is built on community events and wildlife. The Town’s script wordmark and heron seal stay civic while the resort carries the luxury brand and all leisure marketing. The Town is not running Meta ads and the CVB covers regional discovery.





HOW EXTERNAL PARTNERS PROMOTE THEM

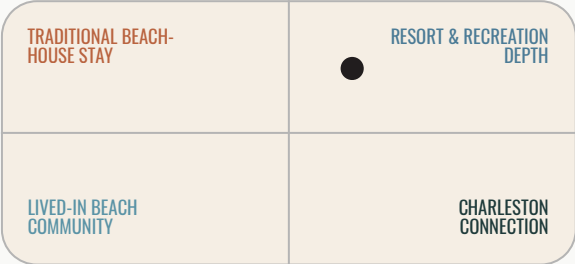
Explore Charleston invites visitors to “steal away to an idyllic island boasting famed accommodations and enchanting wildlife” and calls it an “idyllic, private community.” That matches the resort’s luxury-and-nature framing. Like the resort, the CVB plays down the fact that public beach access is limited to one county park.

BRAND-AUDIENCE CONNECTION

Tight for the luxury golfer and the resort family. The resort’s promise and product match, and the brand speaks with confidence to people who can buy in. For anyone outside that audience the island reads as closed. The Town’s plan notes visitor volume “creates significant strain on Kiawah’s single access road.”

POSITIONING

Resort and recreation depth. Kiawah and Wild Dunes own resort recreation. Kiawah adds a gate and privacy.



KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Audience split on kiawahisland.gov is a working model for one IOP site that serves every audience, without blurring them.
- Match Kiawah’s recreation planning, organized by age and interest, and position IOP as resort-level recreation *without* the gate.

Seabrook Island, SC

| **Regional** • “Oceanfront Living Near Charleston” • Seabrook Island Club

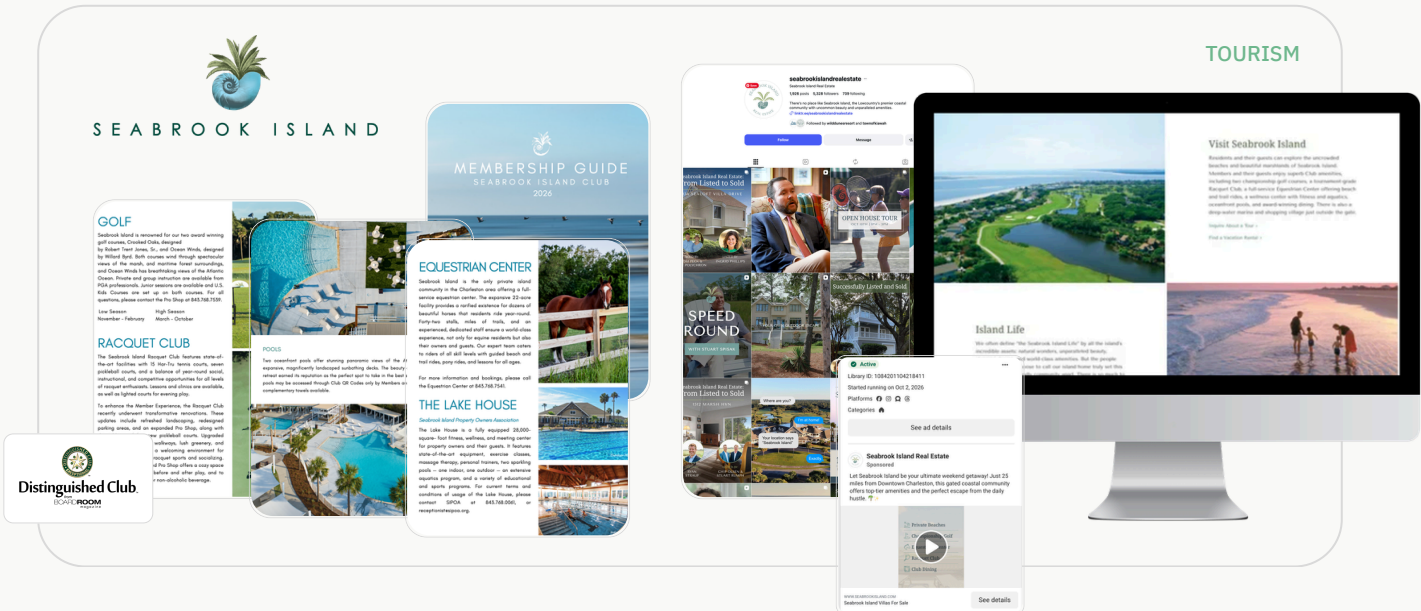
POSITIONING (KNOWN FOR)	A private, quiet coastal community with a nature and club lifestyle. The island is marketed less as a destination than as a place to <i>belong</i> : “a private, welcoming oceanfront community,” a “gated coastal barrier island” and “a birders paradise.”
TARGET AUDIENCE	Families and couples seeking privacy, nature and longer stays, plus homebuyers and Club members, who are the main audience of the island’s primary website. Residents skew older, with a median age of 68 in 2020.
VALUE PROPOSITION	Seclusion near Charleston. There are no hotels; stays are rental homes and villas. The island offers 36 holes of golf, tennis and pickleball, beach horseback rides and wildlife. Amenities run through the private Club, and renters need an amenity card.
MARKETING STRATEGY	Rental-led trip planning with privacy and itinerary content, though the itinerary is Explore Charleston’s, not the island’s. The Town markets nothing beyond a list of rental companies. The Club’s real estate team runs the island’s only Meta ads, which in October 2026 targeted sellers (“What’s My Home Worth?”) and buyers (“your ultimate weekend getaway”).
HOW THEY INTERCEPT IOP	Captures quieter stay intent with explicit rental pathways. Explore Charleston’s five-day “perfect stay” itinerary gives families a concrete reason to stay, which is the planning content IOP does not yet have.

MARKETING OVERVIEW

The municipal site and the Club site are fully separate. The Town site is civic, with a pelican seal, meetings calendar, code enforcement and hurricane readiness. The Club site has shell-and-palm mark, sea-glass palette, and hospitality photography of golf, beaches, horses and homes. And Seabrook Island Real Estate’s Instagram (5.3K followers) is majority listings and market updates.



TOURISM



HOW EXTERNAL PARTNERS PROMOTE THEM

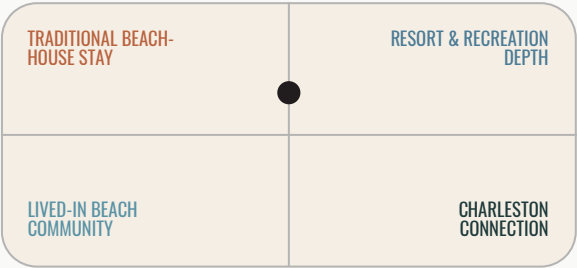
On brand, but limited on access. Explore Charleston says “escape to a private enclave with natural beauty in spades” and “one of the Lowcountry’s best-kept secrets.” That fits the Club’s privacy-and-nature story. However, a CVB blog calls the beaches *technically* public while the Town’s 2024 Beach Management Plan says they are “not accessible to the general public.”

BRAND-AUDIENCE CONNECTION

The brand is built to sell real estate (and it does). For a visiting family the promise of privacy is real, but the gate passes, amenity cards and fees are discovered late in planning.

POSITIONING

The quiet residential stay, between resort/recreation depth and the Charleston connection. Seabrook offers no lived-in public beach town.



KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Seabrook’s language of community and membership (aka *belonging*) sells. IOP can offer that feeling publicly, without the gate.
- Seabrook’s own plan names the gap IOP faces: “develop promotions to expand tourism into the low season.” The opportunity is an IOP-specific, easy to book off-season story that reaches the audience first.

Wild Dunes Resort (Isle of Palms, SC)

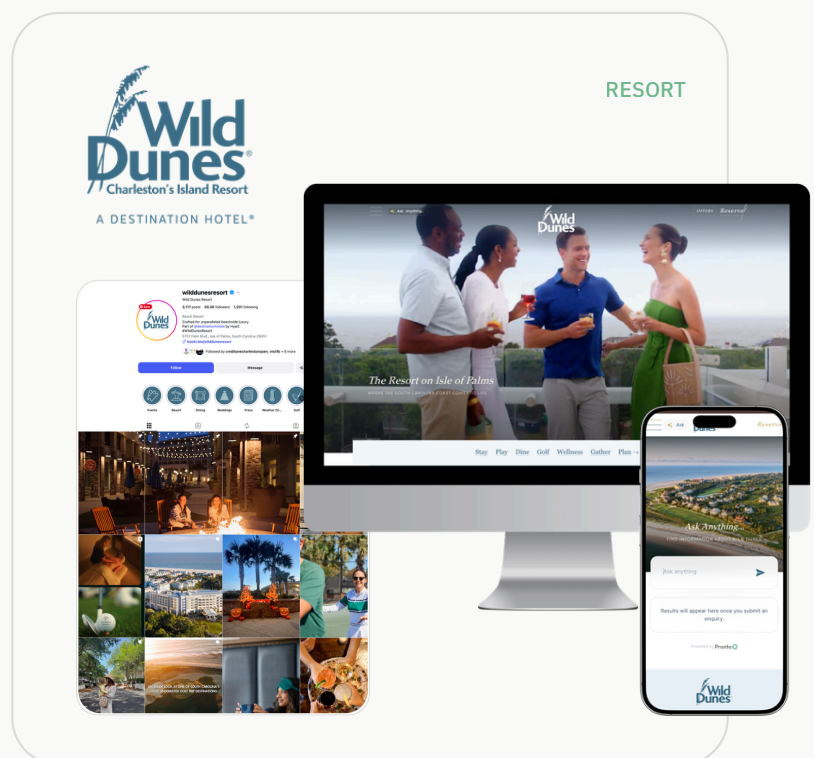
Regional • “Charleston’s Island Resort” • “The Resort on Isle of Palms”

POSITIONING (KNOWN FOR)	The resort and family benchmark, and the only competitor on the island itself. Wild Dunes calls itself “South Carolina’s premier coastal getaway” with a luxury tone: “Crafted for unparalleled beachside luxury.”
TARGET AUDIENCE	Families and resort travelers, plus couples, golfers, weddings, meetings, groups and reunions. The Boardwalk Inn’s adults-only pool speaks directly to couples.
VALUE PROPOSITION	Resort and multi-bedroom stays with recreation: two inns, including the 153-room Sweetgrass Inn, the Residences at Sweetgrass (1-3 bedrooms) and 175 vacation rentals. Two Tom Fazio courses, 12 tennis and 6 pickleball courts, a spa and 2.5 miles of beach, on a gated 1,600 acres.
MARKETING STRATEGY	Accommodation and family-recreation-led booking, backed by the heaviest paid program in the set. At least 90 Meta ads were active (as of October 2026) for golf packages, each inn, the Residences and weddings. Seasonal pages and offers run from Frightmare by the Sea and holiday festivals to a Literary Series and spring break.
HOW THEY INTERCEPT IOP	Captures IOP stay demand through a stronger brand footprint. “Wild dunes resort” draws about 27,100 searches a month, nearly double “isle of palms hotels” (14,800), and peaks in March–April, when families compare resorts.

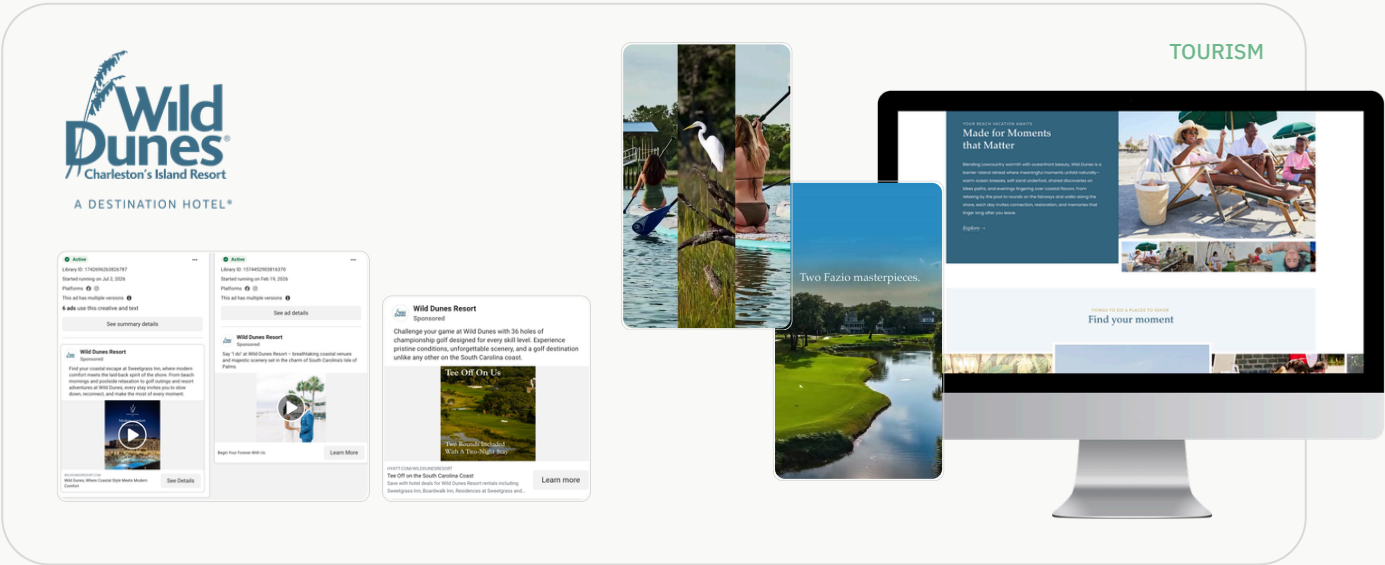
MARKETING OVERVIEW

Polished hospitality brand inside the Hyatt system: slate-blue palette, bold wordmark and lifestyle photography of families and couples. Instagram has 65.5K followers, mixing village nights, golf, events and creator content.

Ads lean on proximity/exploration: “just 30 minutes from Charleston” and “Trade the everyday for island exploration.”



TOURISM



HOW EXTERNAL PARTNERS PROMOTE THEM

On brand, and doing IOP’s work. Explore Charleston’s Isle of Palms page names “the *famed* Wild Dunes Resort” first and gives it its own card; most dining links go to the resort. The CVB folds Wild Dunes into IOP’s family, golf and beach story – while the resort mentions IOP mainly as its address.

BRAND-AUDIENCE CONNECTION

Strong. Product, photography and ad copy all promise the same polished stay, and search demand shows it lands. The gaps are telling: no pets, valet-only parking and gate entry. The dog-friendly, public island sits outside the resort’s brand.

POSITIONING

Resort and recreation depth, with a Charleston connection. Wild Dunes owns resort recreation on IOP itself. The residential beach town around it is IOP’s to claim.

TRADITIONAL BEACH-HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Wild Dunes is IOP’s strongest brand asset in *search* and a partner as much as a competitor. The IOP brand should be the umbrella resort guests discover beyond the gate: the beach town, the dock, dining and dogs. That turns resort demand into *island* demand.
- Keep the identities *distinct* – IOP should read residential and civic-warm, not hotel-polished.

Hilton Head Island, SC

Audience-Adjacent • America's Favorite Island® • “Naturally Your Favorite”

POSITIONING (KNOWN FOR)	Family-friendly, resort, golf and tennis. The long-standing “golf-and-tennis resort island” is now packaged under a registered superlative, America's Favorite Island®, with “Naturally Your Favorite” as the campaign line.
TARGET AUDIENCE	Families and multigenerational resort travelers. The DMO's FY2026-27 plan names three personas: the Family (“please everyone during the school holidays”), Arts, History & Culture, and wellness travelers. Group sales target meetings and incentives.
VALUE PROPOSITION	Broad accommodations and deep family recreation: “12 miles of pristine beaches,” more than 64 miles of public pathways and about two dozen golf courses, plus an airport about five miles away. Visitors stay an average of 6.9 nights.
MARKETING STRATEGY	Detailed activity and accommodation planning on a large site architecture: Stay, See & Do (16 categories), Golf, Events, Weddings, Meetings and an “Island Time” blog, with filterable itineraries, an AI trip planner and email capture. Paid Meta ads (84 running as of October 2026) push fly-in access (“Your Ticket to Island Time”) and the “Naturally Your Favorite” campaign. The DMO's marketing budget is \$3.7 million, funded by state accommodations tax.
HOW THEY INTERCEPT IOP	Captures family resort and beach-house planning, and is the destination searchers most often weigh directly against IOP. “Hilton head family resorts” averages about 1,060 searches a month in spring; beach-house rentals hold about 1,200 in summer.

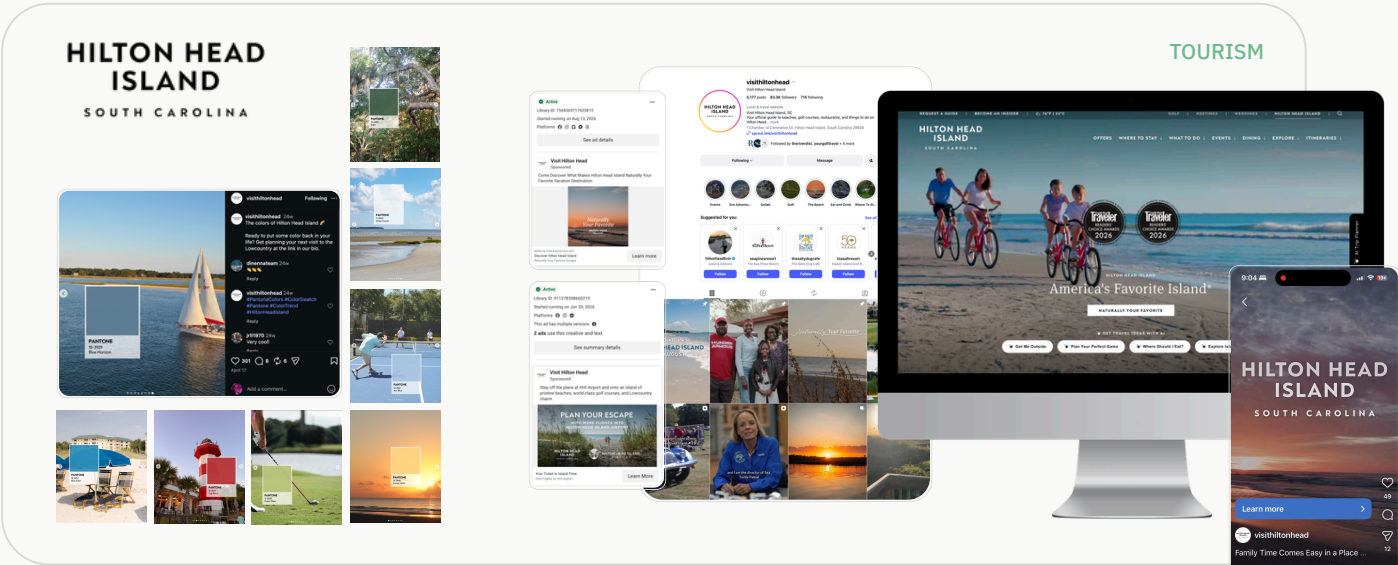
MARKETING OVERVIEW

The Town site and the visitor brand (run by the Chamber) are fully separate. The visitor site leads with photography over design, puts the registered tagline everywhere, and pitches lodging immediately, using the island's reputation to sell accommodations.

Social carries the same lifestyle look, ads move from island to airport to state to country and in-step with international travel efforts.



TOURISM



HOW EXTERNAL PARTNERS PROMOTE THEM

Partly off brand at the state level. Discover South Carolina calls it “Luxury in the Lowcountry” and does not use “America’s Favorite Island.” The tagline lives only in Hilton Head’s own channels. Even the DMO plan leads with “Naturally Your Favorite” and “It Starts With A Visit.”

BRAND-AUDIENCE CONNECTION

Strong and earned. The brand promises an easy and complete family vacation, with planning tools. The long stays and “Return Year After Year” ads show the fit, but risks being generic: “favorite” and “naturally” could belong to any island. However, the simplicity of the play on words to the natural environment is admirable.

POSITIONING

Between the traditional beach-house stay and resort and recreation depth. Hilton Head has no lived-in town feel and no large city next door, two things IOP has.

TRADITIONAL BEACH-HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Hilton Head’s DMO goals, “quality over quantity” and “a high-value but diverse visitor mix,” are IOP’s own goals – proven at scale. Borrow its planning depth (activities by type and age, itineraries, stay choice) and its discipline of one line used everywhere.
- Differentiate on what Hilton Head cannot claim: a residential island *minutes* from Charleston.

Pawleys Island, SC

Audience-Adjacent • “Arrogantly shabby” • “The original beach vacation” • Hammock Coast®

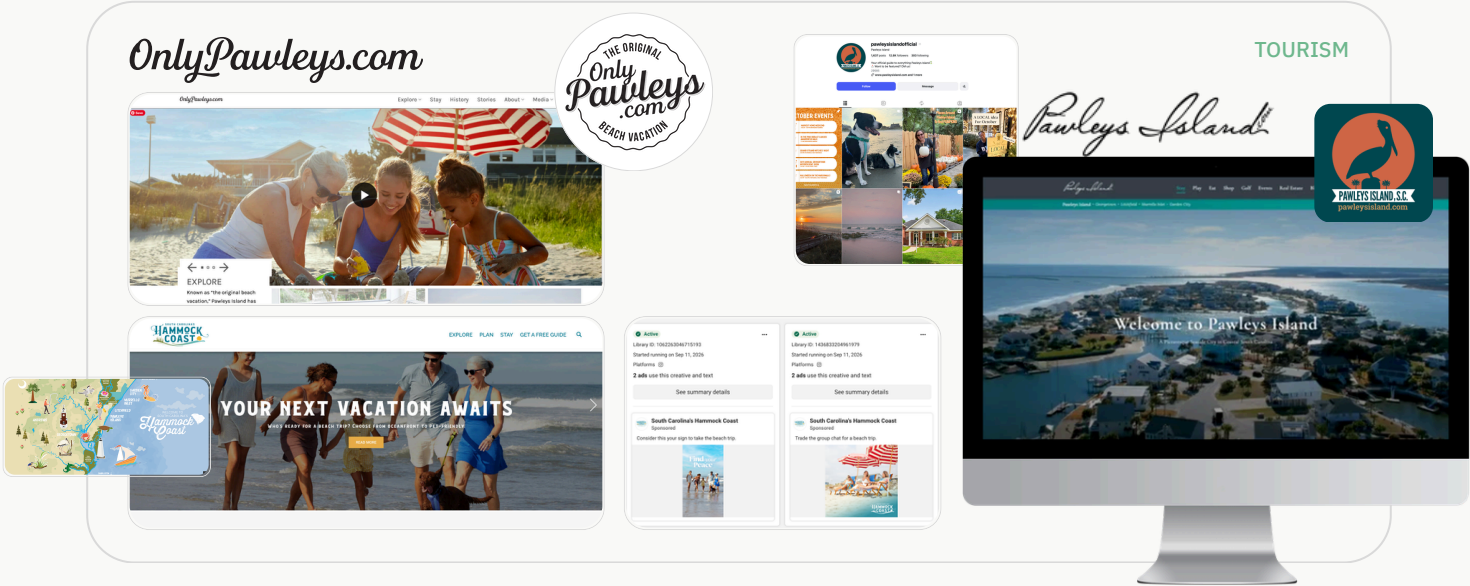
POSITIONING (KNOWN FOR)	A quiet, traditional beach-house destination. The Town calls itself “one of the oldest summer resorts on the East Coast,” with a “shoeless, carefree, laid-back life style.”
TARGET AUDIENCE	Families seeking relaxed, house-based stays, often across generations, and returning renters. The Town’s plan aims to “encourage a stable and continued rental vacationing population.”
VALUE PROPOSITION	Rentals, marsh and the traditional beach experience. About 300 rental units and two small inns sit on four and a half miles of beach. About 120 people live there year-round, and the summer population tops 3,000.
MARKETING STRATEGY	Family-beach and rental-led storytelling built on heritage, hammocks, golf and history rather than activities. The Georgetown County Chamber markets the Town within the Hammock Coast® with the Town’s 30% tourism share (\$152,225 in 2024), including a \$46,204 Atlanta campaign in print, out-of-home and digital.
HOW THEY INTERCEPT IOP	Competes for the relaxed rental-house vacation, especially for families who want a slower, house-based week. The Chamber’s top web markets for Pawleys are Atlanta, Charlotte, Raleigh, New York, Nashville and Charleston, the same drive markets that send IOP its out-of-area planners.

MARKETING OVERVIEW

Three sites send a weak, split signal.

The Town site covers government and rules. The Town’s “Official Town Tourism Site” is onlypawleys.com, run by the Chamber. The most visible and polished site, pawleysisland.com, is privately owned and its Instagram (12.8K followers) calls itself “Your official guide to everything Pawleys Island.” Neither the Town nor the private site ran Meta ads during the audit. The Hammock Coast is running Meta ads, though none specifically for Pawleys. The Town social is civic: parades, road closures and safety.





HOW EXTERNAL PARTNERS PROMOTE THEM

On brand in spirit, inconsistent in wording. The Hammock Coast describes “the laidback, carefree lifestyle” and calls Pawleys “lovingly referred to as ‘arrogantly shabby.’” The heritage claim shifts at each level: Town says the oldest resort on the “East Coast,” county says “in America,” and the state says “in the southeast.”

BRAND-AUDIENCE CONNECTION

Strong with loyal multigenerational families who already know it; weak at reaching new ones. The brand is a feeling (“blood pressure goes down when you cross the causeway”); private site speaks for the island in search.

POSITIONING

The traditional beach-house stay, bordering the lived-in beach community. Pawleys has no resort depth and no city nearby.

TRADITIONAL BEACH-HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Heritage and repeat family tradition *are* a real brand. IOP’s own research shows the same multigenerational returns and the IOP brand should name them.
- Pawleys shows the cost of a split official voice. If the City does not give visitors one clear official voice, commercial sites will.

Emerald Isle, NC

| **Audience-Adjacent** • “Family beach” • “Nice Matters!” • Crystal Coast: Southern Outer Banks®

POSITIONING (KNOWN FOR)	A family and beach-house destination. The Town wants to be “the best it can be as a tourism destination while preserving its ‘family beach’ image.” Its plan describes a “family-friendly water-based lifestyle.”
TARGET AUDIENCE	Families seeking weeklong rental stays. The Town Manager’s welcome speaks directly to “a family looking for an annual weeklong vacation paradise.”
VALUE PROPOSITION	Oceanfront rentals and the full beach week: about 12 miles of beach, more than 100 public water access points, the Bogue Inlet Pier, and about 3,935 homes that are second homes or vacation rentals.
MARKETING STRATEGY	Weeklong itinerary and rental-led planning, carried largely by rental companies and the county DMO, the Crystal Coast Tourism Authority. Off-season anchors include the St. Patrick’s Festival in March, a fall fishing tournament and an October marathon.
HOW THEY INTERCEPT IOP	Makes a weeklong beach-house stay easy to picture and plan. Rental searches average about 8,433 a month in summer and 6,900 in spring, demand that IOP’s rental base could compete for with comparable planning depth.

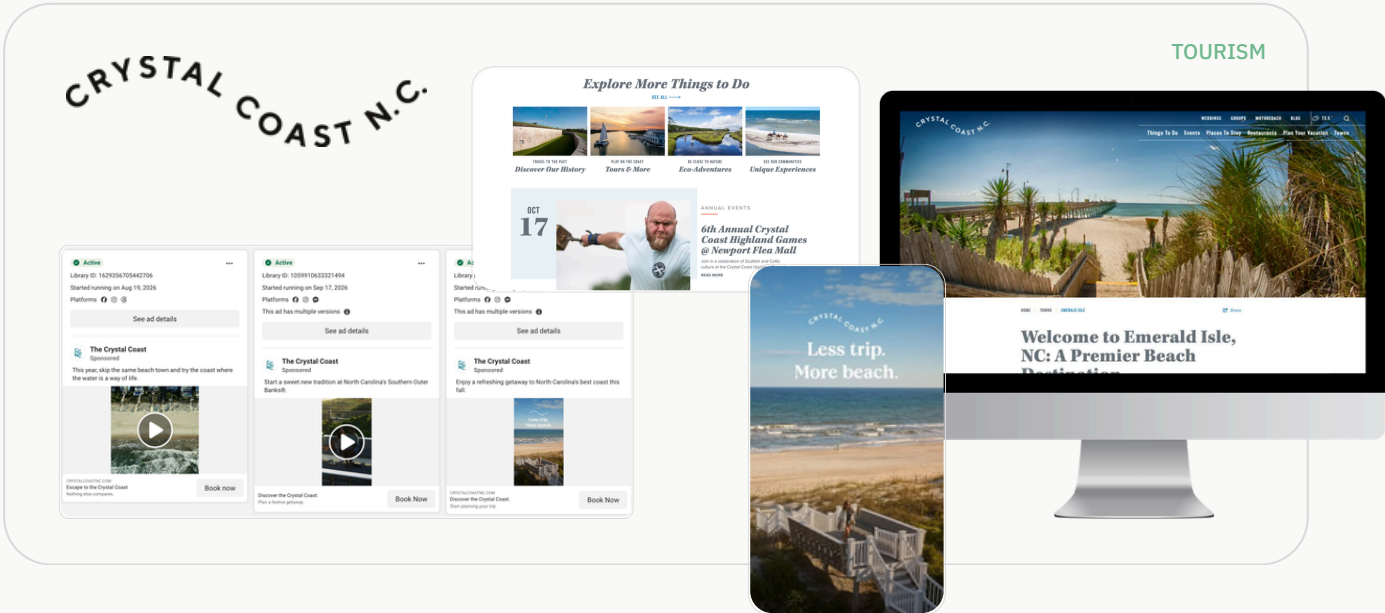
MARKETING OVERVIEW

One Town site serves residents and visitors through a combined “Living & Visiting” section, a beach flag status bar, live cameras, weather station, an app, and “Visit EI” entry point. **It is the closest model to the combined role IOP is weighing.**

Town Facebook has 63K followers; Instagram (5.5K) is civic and event-led. The Town runs no Meta ads. The Crystal Coast does, but ran none for Emerald Isle during the audit.



TOURISM



HOW EXTERNAL PARTNERS PROMOTE THEM

Partly off brand. The Crystal Coast frames Emerald Isle as “A Premier Beach Destination” within the “Southern Outer Banks®,” mentioning family-friendly attractions only in its page *description*. The Town’s “family beach” identity is diluted at the county level.

BRAND-AUDIENCE CONNECTION

Clear and practical with the family renter. The tone is friendly (“Nice Matters!”), useful and *rule-forward*. Visually it is municipal more than aspirational and the emotional sell is left to rental companies.

POSITIONING

The traditional beach-house stay, overlapping the lived-in beach community. Emerald Isle has no resort depth and no city nearby, which is the gap IOP fills.

TRADITIONAL BEACH- HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- Emerald Isle shows that a single municipal site can serve residents and visitors well.
- The weeklong family beach is an explicitly owned claim here. IOP should show the full beach-house week – with Charleston as a close, optional excursion.

Surfside Beach, SC

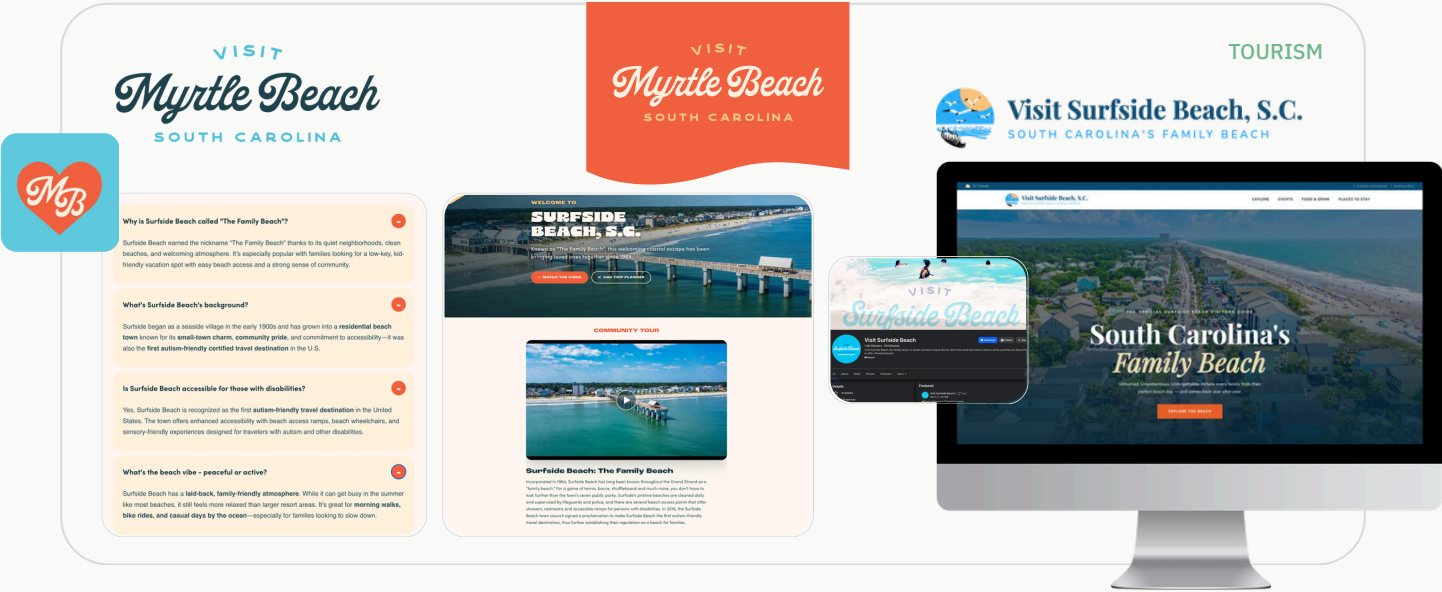
Audience-Adjacent • “The Family Beach” • “South Carolina’s Family Beach”

POSITIONING (KNOWN FOR)	A family and general beach. Surfside put “The Family Beach” in its name and uses it at every level: the Town, its visitor site, the regional visitors bureau and the state. Its hero line is “Unhurried. Unpretentious. Unforgettable.”
TARGET AUDIENCE	Families who want an easy beach vacation, including families with autistic members. The Town has positioned itself as an autism-friendly destination since a 2016 Town resolution.
VALUE PROPOSITION	Explicit family identity and an ADA accessible beach stay: 2 miles of beach, 36 access points, free beach wheelchairs, a rebuilt 800-foot pier with an elevator, and Pier Village as its downtown. It sells itself as “the Grand Strand’s best-kept secret,” away from Myrtle Beach crowds.
MARKETING STRATEGY	“Family Beach” positioning, activities and lodging. The Town runs its own visitor site and pays the Myrtle Beach Area Chamber for regional advertising. Fall programming is family-centered: a Fall Family Festival, Celebrate Surfside and a farmers market into December.
HOW THEY INTERCEPT IOP	Captures family-beach discovery. Surfside leads the Google AI Overview for South Carolina family-beach searches, shaping the shortlist before anyone clicks.

MARKETING OVERVIEW

Two separate sites: The Town’s civic site has a retro mural header, calendar and utilities. The Town-run visitor site is bright blue, with a sun and gulls mark, blog, events and the line “Where every family feels at home.” Social is modest: Town Facebook (50K), Visit Surfside Beach Facebook (7.3K) and a small Instagram, @thefamilybeach (2K), that links to the Town site. Neither site ran Meta ads during the audit. The spend is low and the message is consistent.





HOW EXTERNAL PARTNERS PROMOTE THEM

On brand, and the most consistent in the set. Visit Myrtle Beach calls it “The Family Beach with a Bustling Pier Village.” Discover South Carolina uses “family beach” and leads with the autism-friendly designation.

BRAND-AUDIENCE CONNECTION

Direct and believable for value-minded families. The name, the pier and the practical information all say “easy.” The claim is generic enough to fit dozens of beaches, but repetition across every channel has made it ownable, enough to lead in AI search.

POSITIONING

The lived-in beach community. Surfside has limited resort community depth and no large city nearby – though Myrtle Beach is nearby and offers family-friendly attractions (with a crowd).

TRADITIONAL BEACH-HOUSE STAY	RESORT & RECREATION DEPTH
LIVED-IN BEACH COMMUNITY	CHARLESTON CONNECTION

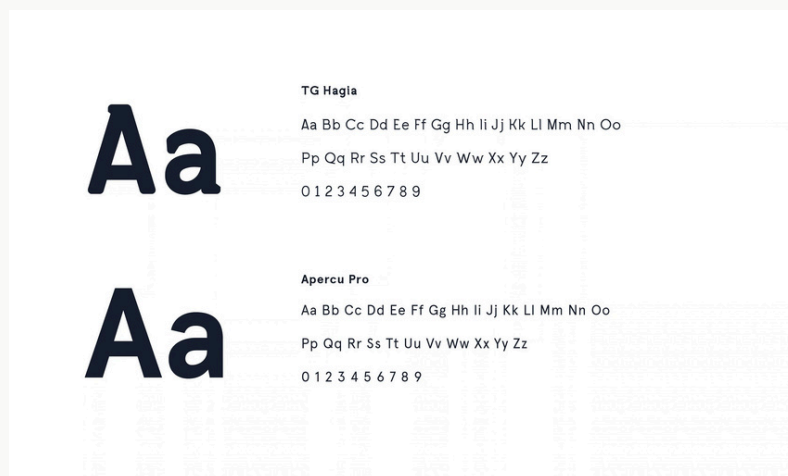
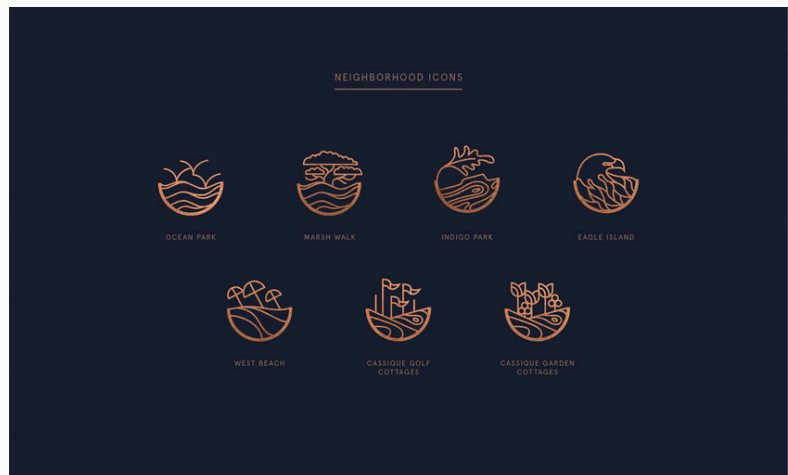
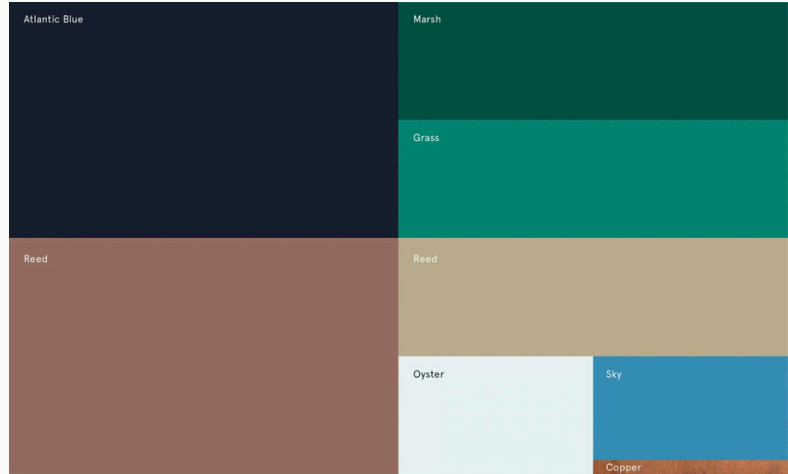
KEY TAKEAWAY FOR IOP BRAND DEVELOPMENT

- One plain claim, repeated by the Town, the regional bureau and the state, is outperforming larger budgets in AI search. IOP needs Explore Charleston and its partners saying what IOP says, together.
- The word “family” is crowded. IOP should make it specific: the week, the house, the dock, the dog. Accessibility for specific family needs is a credible proof point (designated accessible parking, ADA-compliant beach boardwalks, and free daily beach wheelchairs).

Competitor Brand Asset Archive

Kiawah Island, SC

Regional • “The golf resort island” • “Welcome to Our Island Paradise”



Wild Dunes Resort (Isle of Palms, SC)

Regional • “Charleston’s Island Resort” • “The Resort on Isle of Palms”



Hex Code	Color name
#8D98BB	Nepal
#BBD8DC	Ziggurat
#005090	Congress Blue

The opportunity was to create a branded house that reflects the resort's full experience, not just its individual properties.

A CLEAR AND COMPELLING STORY

Wild Dunes offers something rare: a full-service resort community just outside Charleston that feels connected to the city yet distinctly secluded. That balance became the foundation of the brand story.

Rather than position Wild Dunes as an extension of Charleston, we established it as a destination in its own right, where guests can experience the easy rhythms of the coast at their own pace.

Hilton Head Island, SC

| Audience-Adjacent • America's Favorite Island® • “Naturally Your Favorite”

HILTON HEAD ISLAND

SOUTH CAROLINA

ISLAND CHARACTER VISION STATEMENT

Development shall exhibit a harmonious relationship with the natural environment by blending the principles of sensitive site planning, skillful architectural design, and an emphasis on landscaping that preserves and enhances the native vegetation.

THE GOAL OF THIS DESIGN GUIDE IS TO PRESERVE THE ISLAND CHARACTER BY DIRECTING DEVELOPMENT TO

PRESERVE SIGNIFICANT EXISTING SITE FEATURES, TREES, & VEGETATION.	DESIGN STRUCTURES APPROPRIATE FOR THEIR USE AND NEIGHBORHOOD.		PROVIDE LIGHTING THAT IS ADEQUATE FOR SAFETY AND ENHANCES THE SITE.	
TREAT THE LANDSCAPE AS A MAJOR ELEMENT OF THE PROJECT.		DESIGN STRUCTURES WITH SUBTLE VISUAL IMPACT. UTILIZE NATURAL MATERIALS, TEXTURE, AND COLORS.		COORDINATE AND HARMONIZE THE DESIGN OF STRUCTURES, PARKING, AND SITE AMENITIES.
	DEMONSTRATE THE FUNDAMENTAL PRINCIPLES OF GOOD ARCHITECTURAL DESIGN.		PROVIDE CONTINUITY OF DESIGN ON ALL FACADES OF THE BUILDING.	
PROVIDE LANDSCAPING OF A SCOPE AND SIZE THAT IS IN PROPORTION TO THE SCALE OF THE DEVELOPMENT.		DESIGN AND MAINTAIN LANDSCAPING IN ITS NATURAL SHAPE AND SIZE.	PROMOTE PEDESTRIAN SCALE AND CIRCULATION.	CONCEAL VISUALLY UNDESIRABLE UTILITIES AND EQUIPMENT.

Sources

1. US Census, [State Population Estimates](#)
2. US Census, [County Population Estimates](#)
3. US Census, [American Community Survey \(2009 - 2013\)](#)
4. US Census, [Historical Populations of States and Counties \(1790 - 1990\)](#)
5. US Census, [Charleston County QuickFacts](#)
6. IRS, [2022-2023 Migration Data](#)
7. SCPRT, [Total Domestic Travel to South Carolina \(2021\)](#)
8. SCPRT, [Domestic Business Travel to South Carolina](#)
9. SCPRT, [Domestic Visit Friends & Relatives Travel to South Carolina](#)
10. SCPRT, [Domestic Out of State Leisure Travel to South Carolina](#)
11. SCPRT, [Domestic In-State Leisure Travel to South Carolina](#)
12. SCPRT, [Domestic Travel to South Carolina that Includes Golf](#)
13. SCPRT, [2% Accommodations Tax Revenue Distribution – Q3 FY25-26](#)
14. SCPRT, [South Carolina Statewide Lodging Outlook Report \(May 2026\)](#)
15. SCPRT, [South Carolina Statewide Lodging Outlook Report \(April 2026\)](#)
16. SCPRT, [FY2024–25 Accountability Report](#)
17. BCD Council of Governments, [10-Year Traffic Counts \(2016-2025\)](#)
18. SC Dept. of Parks, Recreation & Tourism, [2025 Accountability Report](#)
19. US Travel Association, [Travel Forecasts \(2026\)](#)
20. Your Pad, [AirBnB Guidebook \(2025\)](#)
21. Charleston Metro Chamber, [2025 Economic Outlook Forecast](#)
22. Charleston Regional Development Alliance, [Regional Data](#)
23. Charleston County, [Consolidated Plan Executive Summary \(2026-2030\)](#)
24. Charleston County Economic Development, [Tourism & Hospitality](#)
25. Charleston County Economic Development, [Economic Impact \(2026\)](#)
26. Charleston County Economic Development, [News Release \(June 2026\)](#)
27. City of Charleston, Tourism Management, [Responsible Tourism, Tourism Management \(2015-2025\)](#)
28. City of Charleston, [Municipal Quarterly Update \(Spring 2025\)](#)
29. College of Charleston, OTA, [Estimation of Tourism's Economic Impacts, Greater Charleston Area \(2025\)](#)
30. College of Charleston, OTA, [2021 Charleston Visitor Inquiry Survey Report](#)
31. City of Isle of Palms, [2023 ATAX Packet & Vacation-Rental Data](#)
32. City of Isle of Palms, [Ways & Means Committee Packet \(July 2026\)](#)
33. City of Isle of Palms, [Comprehensive Plan \(2015\)](#)
34. City of Isle of Palms, [Strategic Plan 2022–2027](#)
35. City of Isle of Palms, [Community Enrichment Plan \(2025\)](#)
36. City of Isle of Palms, [Requests for Proposals RFP 2026-02](#)
37. City of Isle of Palms, [RFP 2026.02: Responses to Questions](#)
38. City of Isle of Palms, [Community Rebrand Survey \(2026\)](#)
39. City of Isle of Palms, [Stakeholder Findings Report \(2026\)](#)
40. City of Isle of Palms, [Tourism & Destination Search Behavior Report \(2026\)](#)
41. City of Isle of Palms, [Comprehensive Brand Audit \(2026\)](#)
42. Visit North Carolina, [2022 North Carolina Regional Visitor Profile – Coastal](#)



43. Visit Myrtle Beach, [2024 Annual Report](#)
44. Visit Myrtle Beach, [Fact Sheet](#)
45. NC Office of the Governor, [Tourism Hits Record \\$37.2 Billion in 2025](#)
46. VisitFolly, [Visitors Guide \(2025\)](#)
47. VisitFolly, [Itineraries](#)
48. VisitFolly, [Fall on Folly](#)
49. VisitFolly, [Annual Events](#)
50. VisitFolly, [Media Kit](#)
51. City of Folly Beach, [Comprehensive Plan \(2021\)](#)
52. Explore Charleston, [Folly Beach](#)
53. Explore Charleston, [Kiawah Island](#)
54. Explore Charleston, [Perfect Stay on Seabrook](#)
55. Explore Charleston, [Isle of Palms](#)
56. Explore Charleston, [Isle of Palms – Areas to Explore](#)
57. Town of Kiawah Island, [KiawahNext Comprehensive Plan 2025](#)
58. Seabrook Island, [Our Difference](#)
59. Seabrook Island, [Membership Guide 2025](#)
60. Town of Seabrook Island, [Comprehensive Plan 2026](#)
61. Town of Seabrook Island, [Visitor Info](#)
62. Town of Seabrook Island, [STR Permits](#)
63. Wild Dunes Resort, [FAQ](#)
64. Wild Dunes Resort, [Search by Season](#)
65. Hilton Head Chamber, [DMO Package 2026](#)
66. Hilton Head Island, [Outdoor Recreation](#)
67. Hilton Head Island, [Island Character Design Guide \(2015\)](#)
68. Hilton Head Island, [The Future - The Story of our Logo](#) (Video)
69. Discover South Carolina, [Hilton Head Island](#)
70. Discover South Carolina, [Pawleys Island](#)
71. Discover South Carolina, [Surfside Beach](#)
72. Town of Pawleys Island, [About](#)
73. Town of Pawleys Island, [2023-2032 Comprehensive Plan](#)
74. Town of Pawleys Island, [ATAX Packet \(November 2025\)](#)
75. Town of Pawleys Island, [Visitors](#)
76. EVOQ, [Pawleys Island](#)
77. The Hammock Coast, [Historic Pawleys Island](#)
78. Town of Emerald Isle, [Manager's Welcome](#)
79. Town of Emerald Isle, [2017 Comprehensive Plan](#)
80. Crystal Coast NC, [Emerald Isle](#)
81. VisitNC, [Emerald Isle Annual Marathon](#)
82. Town of Surfside Beach, [Visitors](#)
83. Town of Surfside Beach, [FY22-23 Adopted Budget](#)
84. Visit Surfside Beach, [Autism-Friendly Beach](#)
85. Visit Surfside Beach, [Events](#)
86. Visit Myrtle Beach, [Your Guide to Surfside](#)