



# Bluffton Visitor Profile Survey

2022

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HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE



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## EXECUTIVE SUMMARY

### SAMPLE DEMOGRAPHICS

Millennials and Gen Z represented a combined total of 82.7% of the respondents, followed by Gen X (12.5%), and then Boomers (4.0%). Over 53% of those surveyed had a bachelor's degree or higher, and more than 70% had an annual household income of \$75,000 or more per year. Also, just under 70% of the respondents were married.

### POINT OF ORIGIN

The respondents resided in 244 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from east to west coast. More respondents resided in California than any other state (10.5%). Second was New York (7.8%), followed then by Indiana (6.5%), Texas (5.0%), Maryland (4.7%), and Georgia (4.5%). In-state visitors did not make up a significantly large portion of the respondents (1.9%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ-PA; Baltimore-Columbia-Towson, MD; Los Angeles-Long Beach-Anaheim, CA; Seattle-Tacoma-Bellevue, WA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Chicago-Naperville-Elgin, IL-IN-WI; and Dallas-Fort Worth-Arlington, TX.

Canada was the top international origin market amongst respondents (32.5%), followed by Europe (20.0%).

### THOSE WHO TRAVELED TO BLUFFTON

The top reasons for choosing Bluffton as a destination included visiting beaches, visiting heritage attractions/museums/historic tours, and spending time with family. Other popular motivations included relaxation, boating/sailing/kayaking, and nature-based activities. The activities in which visitors actually participated are similar to the previously mentioned activities, and also include shopping, culinary, and health/wellness. Amongst Bluffton's overnight visitors, 83.4% were first-time visitors, 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 4.3 for day trip visitors. The main mode of transportation to town was personal/family car (36.7% overnight; 27.8% day trip). About 51.0% of overnight visitors flew to Bluffton via commercial flights, with just under one-third of them (28.5%) landing at the Hilton Head Island Airport.

The average length of stay for those overnight visitors surveyed was approximately 5.3 nights. Hotels were the most popular choice of accommodation for overnight visitors (36.5%), followed by resorts (21.5%), staying with friends/relatives (21.4%), and home/villa rentals (14.8%).

## TRAVEL PLANNING

Airbnb was the most popular online booking platform for villas/homes (31.1%), followed by the local resorts' online booking platforms (23.3%), HomeAway (10.0%), TurnKey (8.9%), and local vacation rental companies (7.8%). The top five other destinations visitors considered before choosing Bluffton were the Alabama Golf Trail; the Hawaiian Islands; Gulf Shores, AL; Orlando, FL; and the Caribbean.

Top reasons for choosing to visit Bluffton were wanting to visit nature-based attractions (41.9%), wanting to visit heritage attractions (35.7%), word-of-mouth recommendation (35.5%), and wanting to visit a beach destination (34.9%)

Of those surveyed, 67.8% indicated an intention to return to visit Bluffton, which signals a high degree of trip satisfaction.

## NON-VISITORS

Of those who indicated not to have traveled at all or not to have traveled to the Hilton Head Island / Bluffton area in the past 12 months (N=341), 42.9% had never visited the Hilton Head Island / Bluffton area before, and 50.4% had visited one to five times before.

Of those non-visitors, 27.0% traveled elsewhere, 5.3% found it too expensive, 5.0% mentioned health reasons, 4.1% were hesitant because of unpredictable weather events, 3.2% did not find what they were looking for, and 0.6% did not travel at all. Over 25% stated the COVID-19 pandemic is still keeping 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 (33.7%) and South (22.3%) were the most popular. Nonetheless, 50.1% 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 (47.3%) take two to four leisure/vacation trips per year, and they are most likely to travel between June and October.

The top five most appealing experiences for leisure trips/vacations were: relaxation & rejuvenation (66.9%), beaches (65.1%), romantic couple getaways (65.0%), passive outdoor adventures (64.4%), and historic attractions (64.4%).

The following attributes were most important in choosing a leisure vacation: quality of dining options (72.5%), natural beauty of the destination (72.1%), quality of lodging options (71.0%), ease of access (70.5%), diversity of dining options (68.6%), environmental/ecological sensitivity (67.6%), and diversity of lodging options (67.3%).



## METHODOLOGY

### SURVEY IMPLEMENTATION

The 2022 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2022 and January 2023, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited [www.hiltonheadisland.org](http://www.hiltonheadisland.org) or [www.visitbluffton.org](http://www.visitbluffton.org) and submitted their email addresses, and they were contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted multiple times during the same time period on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,918 completed surveys were collected. This report is based largely on the 1,005 respondents who visited Bluffton 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, examining visitation in 2021.

The table below shows the visitor estimates for Bluffton by segment for 2021 and 2022.

| Visitor Segment          | 2021           | 2022           |
|--------------------------|----------------|----------------|
| <b>Non-paying Guests</b> | 172,349        | 154,478        |
| <b>Daytrippers</b>       | 309,137        | 277,083        |
| <b>Total Visitors</b>    | <b>481,486</b> | <b>431,561</b> |

Table 1: Visitor Estimates 2022



## SURVEY FINDINGS

### SAMPLE DEMOGRAPHICS

|  |              |
|--|--------------|
| <b>Gender</b>                              |              |
| Female                                     | 38.1%        |
| Male                                       | 61.9%        |
| <b>Marital Status</b>                      |              |
| Married                                    | 69.1%        |
| Single                                     | 14.4%        |
| Divorced                                   | 7.7%         |
| Widowed                                    | 7.2%         |
| Separated                                  | 1.6%         |
| <b>Education (highest level completed)</b> |              |
| Grade School                               | 0.8%         |
| High School                                | 3.6%         |
| Some College                               | 26.7%        |
| Associates Degree (2 years)                | 15.8%        |
| Bachelor's Degree (4 years)                | 33.9%        |
| Graduate Degree (Post degree/MA)           | 19.1%        |
| <b>Age</b>                                 |              |
| 19 years or younger                        | 0.6%         |
| 20 to 29 years                             | 38.3%        |
| 30 to 39 years                             | 44.4%        |
| 40 to 49 years                             | 10.7%        |
| 50 to 59 years                             | 1.8%         |
| 60 to 69 years                             | 2.9%         |
| 70 years and over                          | 1.1%         |
| Prefer not to say                          | 0.2%         |
| <b>Household Income</b>                    |              |
| Under \$24,999                             | 0.8%         |
| \$25,000-\$34,999                          | 5.6%         |
| \$35,000-\$49,999                          | 10.3%        |
| \$50,000-\$74,999                          | 12.6%        |
| \$75,000-\$99,999                          | 18.8%        |
| \$100,000-\$149,999                        | 18.4%        |
| \$150,000-\$199,999                        | 19.1%        |
| \$200,000-\$249,999                        | 7.6%         |
| \$250,000 or more                          | 6.8%         |
| <b>N</b>                                   | <b>1,005</b> |

Table 2: Demographics

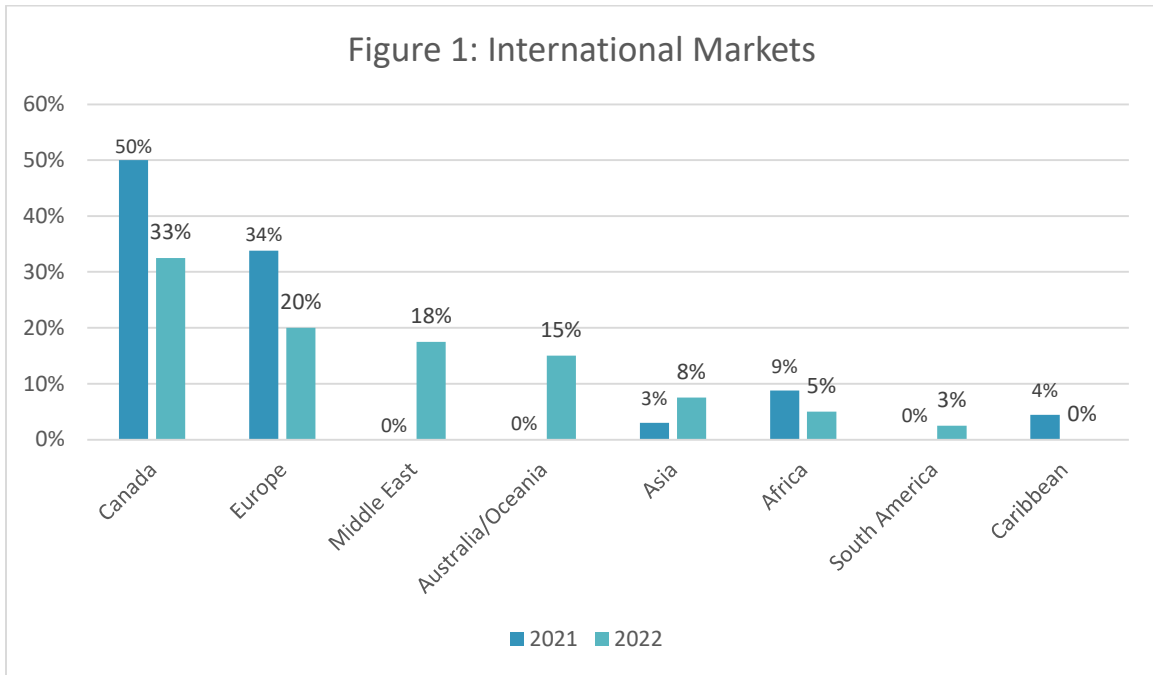
## SAMPLE POINT OF ORIGIN

### ZIP Code Analysis – Top 30 MSAs

|    | Metropolitan Area                            | Sum MSA    | Percent MSA Share |
|----|--|------------|-------------------|
| 1  | New York-Newark-Jersey City, NY-NJ-PA        | 75         | 7.8%              |
| 2  | Fort Wayne, IN                               | 41         | 4.4%              |
| 3  | Baltimore-Columbia-Towson, MD                | 32         | 3.3%              |
| 4  | Los Angeles-Long Beach-Anaheim, CA           | 32         | 3.3%              |
| 5  | Seattle-Tacoma-Bellevue, WA                  | 29         | 3.0%              |
| 6  | Washington-Arlington-Alexandria, DC-VA-MD-WV | 26         | 2.7%              |
| 7  | Chicago-Naperville-Elgin, IL-IN-WI           | 24         | 2.5%              |
| 8  | Rural North Dakota                           | 18         | 1.8%              |
| 9  | Dallas-Fort Worth-Arlington, TX              | 18         | 1.8%              |
| 10 | San Francisco-Oakland-Hayward, CA            | 17         | 1.7%              |
| 11 | Atlanta-Sandy Springs-Roswell, GA            | 17         | 1.7%              |
| 12 | Denver-Aurora-Lakewood, CO                   | 17         | 1.7%              |
| 13 | Indianapolis-Carmel-Anderson, IN             | 15         | 1.5%              |
| 14 | Boston-Cambridge-Newton, MA-NH               | 14         | 1.4%              |
| 15 | Phoenix-Mesa-Scottsdale, AZ                  | 13         | 1.3%              |
| 16 | Philadelphia-Camden-Wilmington, PA-NJ-DE-MD  | 13         | 1.3%              |
| 17 | Detroit-Warren-Dearborn, MI                  | 12         | 1.2%              |
| 18 | Cleveland-Elyria, OH                         | 12         | 1.2%              |
| 19 | Miami-Fort Lauderdale-West Palm Beach, FL    | 11         | 1.1%              |
| 20 | Montgomery, AL                               | 11         | 1.1%              |
| 21 | San Diego-Carlsbad, CA                       | 10         | 1.0%              |
| 22 | Houston-The Woodlands-Sugar Land, TX         | 9          | 0.9%              |
| 23 | Columbus, OH                                 | 9          | 0.9%              |
| 24 | Colorado Springs, CO                         | 9          | 0.9%              |
| 25 | Pittsburgh, PA                               | 9          | 0.9%              |
| 26 | St. Louis, MO-IL                             | 9          | 0.9%              |
| 27 | Russellville, AR                             | 8          | 0.8%              |
| 28 | Easton, MD                                   | 8          | 0.8%              |
| 29 | Worcester, MA-CT                             | 8          | 0.8%              |
| 30 | San Jose-Sunnyvale-Santa Clara, CA           | 7          | 0.7%              |
|    | Other  | 432        | 43.1%             |
|    | <b>Total</b>                                 | <b>965</b> |                   |

Table 3: ZIP Code Analysis – Top 30 MSAs

### International Markets

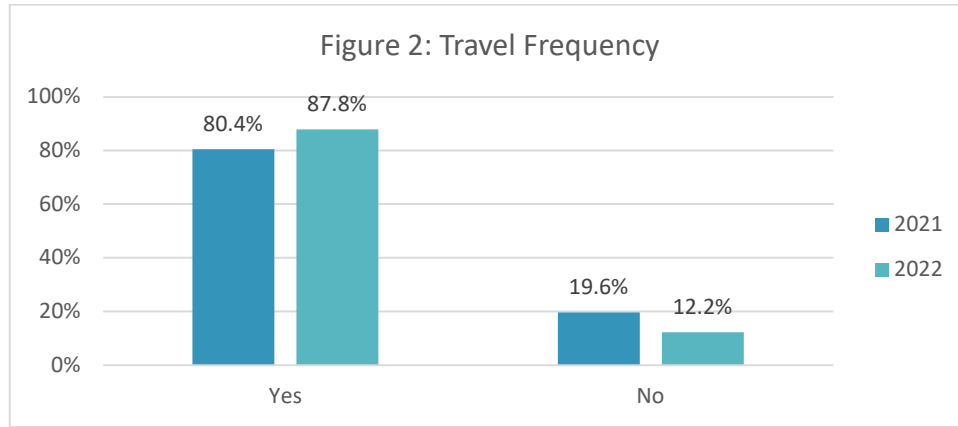


|                   | 2021  | 2022  |
|-------------------|-------|-------|
| Canada            | 50.0% | 32.5% |
| Europe            | 33.8% | 20.0% |
| Middle East       | -     | 17.5% |
| Australia/Oceania | -     | 15.0% |
| Asia              | 3.0%  | 7.5%  |
| Africa            | 8.8%  | 5.0%  |
| South America     | -     | 2.5%  |
| Caribbean         | 4.4%  | -     |
| N                 | 68    | 40    |

Table 4: International Markets

### TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

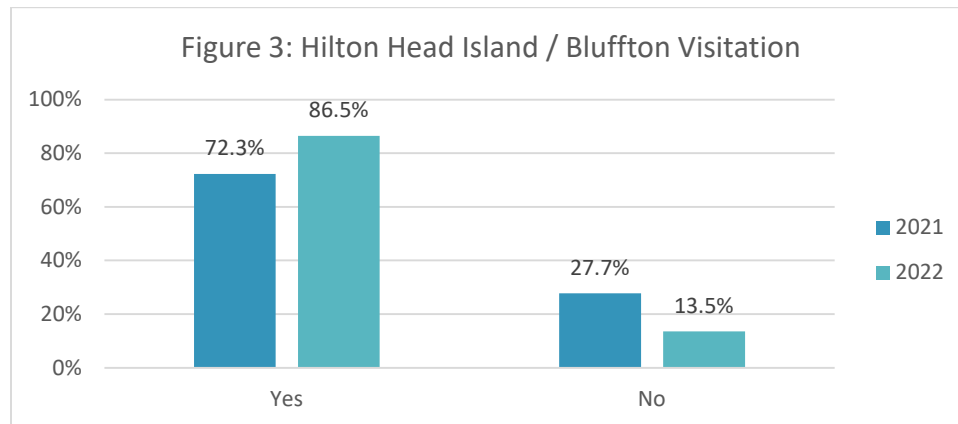
Within the last 12 months have you traveled or taken a vacation?



|            | 2021  | 2022  |
|------------|-------|-------|
| <b>Yes</b> | 80.4% | 87.8% |
| <b>No</b>  | 19.6% | 12.2% |
| <b>N</b>   | 2,084 | 2,918 |

TABLE 5: Travel Frequency by Year

Did you visit Bluffton, SC or Hilton Head Island, SC in the last 12 months?

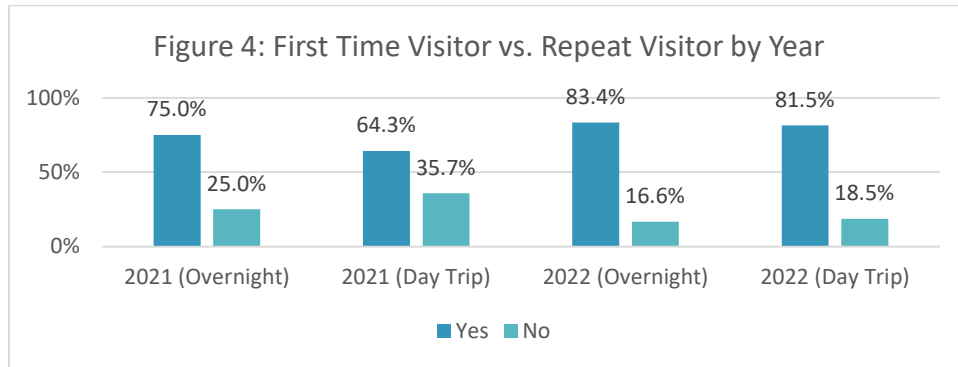


|            | 2021  | 2022  |
|------------|-------|-------|
| <b>Yes</b> | 72.3% | 86.5% |
| <b>No</b>  | 27.7% | 13.5% |
| <b>N</b>   | 1,675 | 2,547 |

TABLE 6: Bluffton / Hilton Head Island Visitation by Year

## BLUFFTON VISITORS

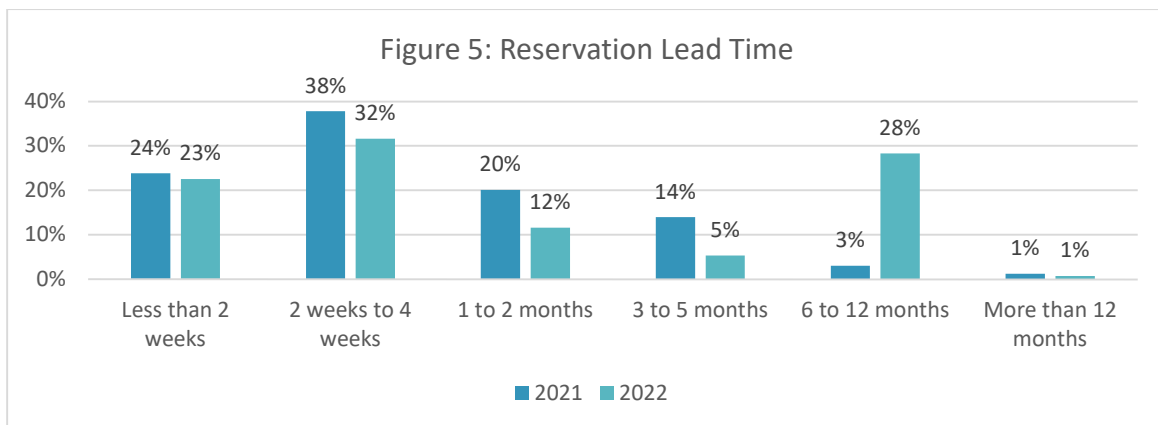
### Was that your first time visiting in Bluffton?



|            | 2021 (Overnight) | 2021 (Day Trip) | 2022 (Overnight) | 2022 (Day Trip) |
|------------|------------------|-----------------|------------------|-----------------|
| <b>Yes</b> | 75.0%            | 64.3%           | 83.4%            | 81.5%           |
| <b>No</b>  | 25.0%            | 35.7%           | 16.6%            | 18.5%           |
| <b>N</b>   | 164              | 28              | 603              | 54              |

TABLE 7: First Time Visitor vs. Repeat Visitor

### Approximately how long before your trip to Bluffton did you make your first reservation (e.g., accommodation, transportation, etc.)?



|                            | 2021  | 2022  |
|----------------------------|-------|-------|
| <b>Less than 2 weeks</b>   | 23.8% | 22.5% |
| <b>2 weeks to 4 weeks</b>  | 37.8% | 31.6% |
| <b>1 to 2 months</b>       | 20.1% | 11.6% |
| <b>3 to 5 months</b>       | 14.0% | 5.3%  |
| <b>6 to 12 months</b>      | 3.0%  | 28.3% |
| <b>More than 12 months</b> | 1.2%  | 0.7%  |
| <b>N</b>                   | 164   | 604   |

TABLE 8: Reservation Lead Time

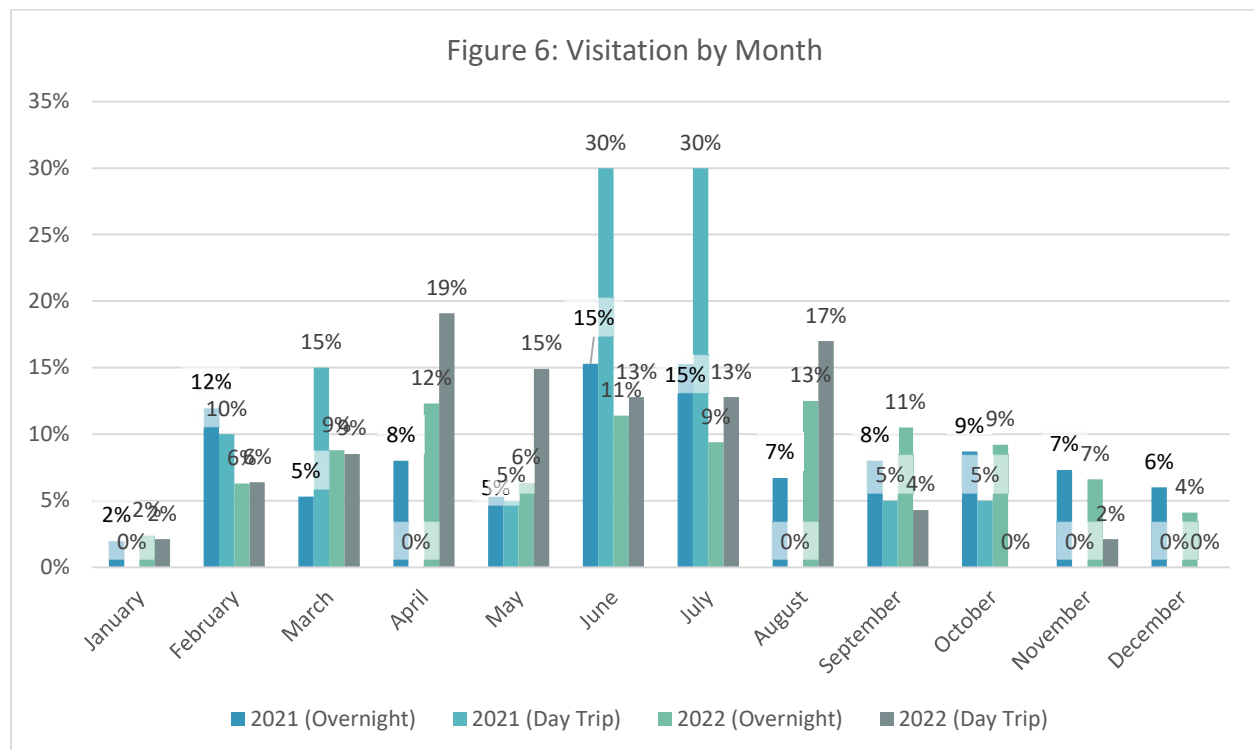
When did you make your most recent trip to Bluffton?

|      | 2021 (Overnight) | 2021 (Day Trip) | 2022 (Overnight) | 2022 (Day Trip) |
|------|------------------|-----------------|------------------|-----------------|
| 2020 | 29.3%            | 15.8%           |                  |                 |
| 2021 | 70.7%            | 84.2%           |                  |                 |
| 2022 |                  |                 | 100.0%           | 100.0%          |
| N    | 150              | 19              | 543              | 47              |

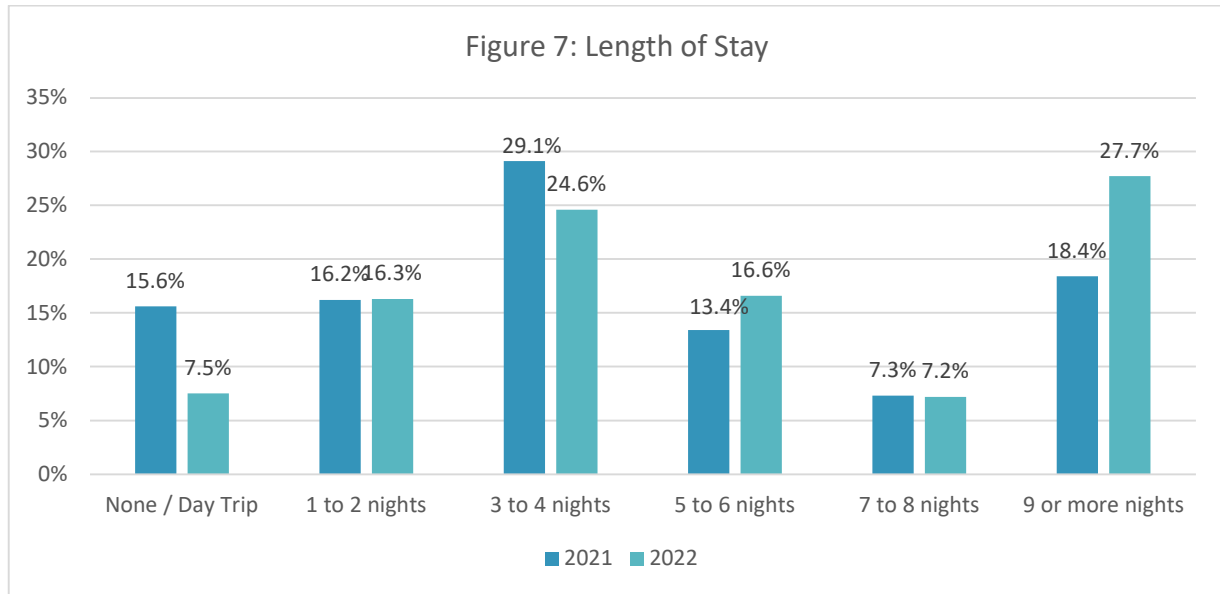
TABLE 9: Visitation Year

|           | 2021 (Overnight) | 2021 (Day Trip) | 2022 (Overnight) | 2022 (Day Trip) |
|-----------|------------------|-----------------|------------------|-----------------|
| January   | 2.0%             | -               | 2.4%             | 2.1%            |
| February  | 12.0%            | 10.0%           | 6.3%             | 6.4%            |
| March     | 5.3%             | 15.0%           | 8.8%             | 8.5%            |
| April     | 8.0%             | -               | 12.3%            | 19.1%           |
| May       | 5.3%             | 5.0%            | 6.4%             | 14.9%           |
| June      | 15.3%            | 30.0%           | 11.4%            | 12.8%           |
| July      | 15.3%            | 30.0%           | 9.4%             | 12.8%           |
| August    | 6.7%             | -               | 12.5%            | 17.0%           |
| September | 8.0%             | 5.0%            | 10.5%            | 4.3%            |
| October   | 8.7%             | 5.0%            | 9.2%             | -               |
| November  | 7.3%             | -               | 6.6%             | 2.1%            |
| December  | 6.0%             | -               | 4.1%             | -               |
| N         | 150              | 20              | 543              | 47              |

TABLE 10: Visitation by Month



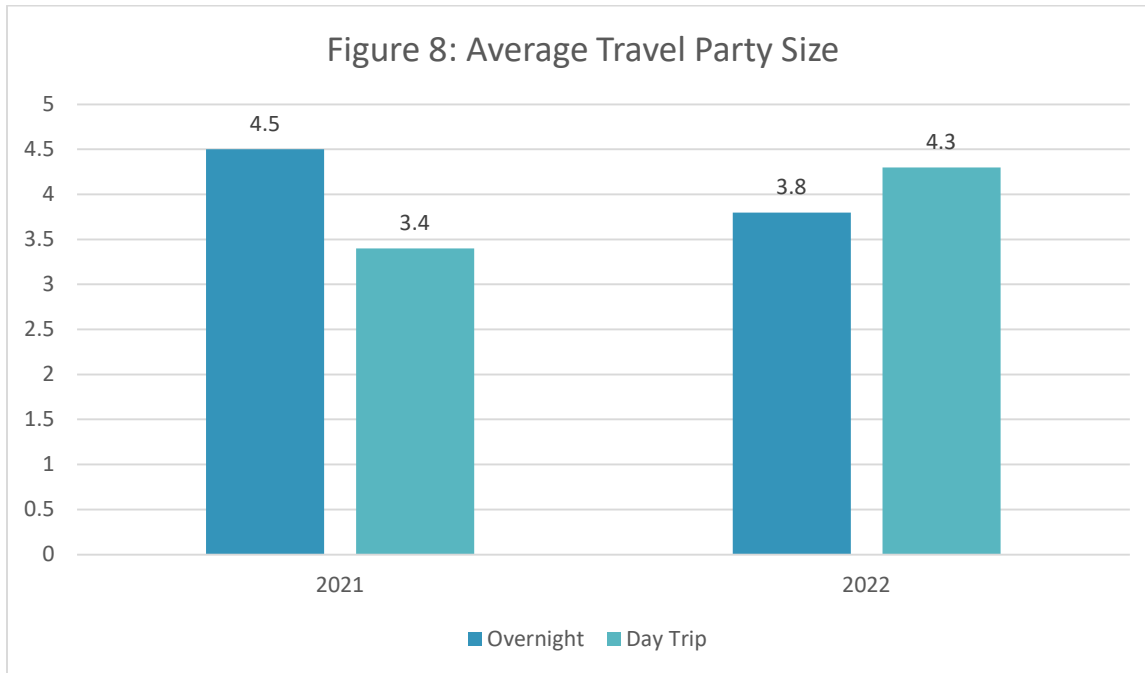
Approximately how many nights was your trip to Bluffton?



|                            | 2021  | 2022  |
|----------------------------|-------|-------|
| <b>None/day trip only</b>  | 15.6% | 7.5%  |
| <b>1 night</b>             | 3.4%  | 3.4%  |
| <b>2 nights</b>            | 12.8% | 12.9% |
| <b>3 nights</b>            | 18.4% | 14.2% |
| <b>4 nights</b>            | 10.6% | 10.4% |
| <b>5 nights</b>            | 13.4% | 9.9%  |
| <b>6 nights</b>            | -     | 6.7%  |
| <b>7 nights</b>            | 4.5%  | 4.6%  |
| <b>8 nights</b>            | 2.8%  | 2.6%  |
| <b>9 nights</b>            | 2.2%  | 2.1%  |
| <b>10 nights</b>           | 5.6%  | 4.2%  |
| <b>11 nights</b>           | 1.7%  | 2.2%  |
| <b>12 nights</b>           | 1.7%  | 1.6%  |
| <b>13 nights</b>           | 1.7%  | 1.1%  |
| <b>14 nights</b>           | 1.7%  | 3.8%  |
| <b>15 nights</b>           | 1.1%  | 2.2%  |
| <b>More than 15 nights</b> | 2.8%  | 10.5% |
| <b>N</b>                   | 179   | 626   |

TABLE 11: Length of Stay

Please indicate how many people (including yourself) were in your travel party.



|                | 2021<br>(Overnight) | 2021<br>(Day Trip) | 2022<br>(Overnight) | 2022<br>(Day Trip) |
|----------------|---------------------|--------------------|---------------------|--------------------|
| <b>Average</b> | 4.5                 | 3.4                | 3.8                 | 4.3                |
| <b>N</b>       | 151                 | 21                 | 543                 | 47                 |

TABLE 12: Travel Party Size

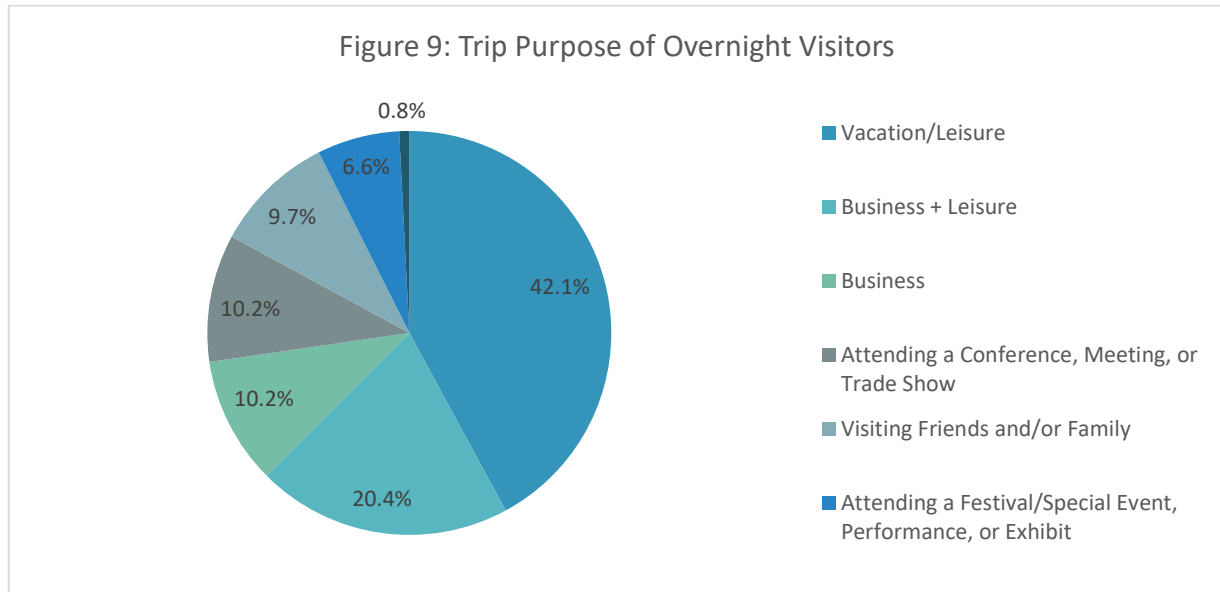
Please indicate by age category how many people were in your travel party.

| Age              |                 | 0     | 1     | 2     | 3    | 4    | 5    | 6 or more |
|------------------|-----------------|-------|-------|-------|------|------|------|-----------|
| <b>Overnight</b> | <b>Under 18</b> | 73.1% | 17.1% | 7.0%  | 0.7% | 1.2% | 0.5% | 0.4%      |
|                  | <b>18-24</b>    | 64.3% | 21.3% | 11.0% | 2.3% | 0.2% | 0.2% | 0.7%      |
|                  | <b>25-34</b>    | 33.4% | 31.3% | 25.2% | 5.4% | 1.4% | 2.1% | 1.2%      |
|                  | <b>35-44</b>    | 67.8% | 18.9% | 8.9%  | 2.1% | 0.5% | 1.4% | 0.5%      |
|                  | <b>45-54</b>    | 90.9% | 3.5%  | 4.7%  | 0.2% | 0.7% | -    | -         |
|                  | <b>55-64</b>    | 94.4% | 3.3%  | 2.3%  | -    | -    | -    | -         |
|                  | <b>65+</b>      | 96.0% | 2.6%  | 1.4%  | -    | -    | -    | -         |
| <b>Day Trip</b>  | <b>Under 18</b> | 68.8% | 31.3% | -     | -    | -    | -    | -         |
|                  | <b>18-24</b>    | 62.5% | 6.3%  | 18.8% | 6.3% | 0.0% | -    | 6.3%      |
|                  | <b>25-34</b>    | 56.3% | 12.5% | 25.0% | 6.3% | -    | -    | -         |
|                  | <b>35-44</b>    | 81.3% | 12.5% | 6.3%  | -    | -    | -    | -         |
|                  | <b>45-54</b>    | 75.0% | 12.5% | 12.5% | -    | -    | -    | -         |
|                  | <b>55-64</b>    | 93.8% | -     | -     | 6.3% | -    | -    | -         |
|                  | <b>65+</b>      | 81.3% | 6.3%  | 6.3%  | -    | 6.3% | -    | -         |

TABLE 13: Travel Party Age Mix



**What was the main purpose of your overnight visit to Bluffton?**



|  | 2021  | 2022  |
|--|-------|-------|
| <b>Vacation/Leisure</b>  | 46.3% | 42.1% |
| <b>Business + Leisure</b>  | 22.1% | 20.4% |
| <b>Business</b>  | -     | 10.2% |
| <b>Attending a Conference, Meeting, or Trade Show</b>              | 9.4%  | 10.2% |
| <b>Visiting Friends and/or Family</b>                              | 16.8% | 9.7%  |
| <b>Attending a Festival/Special Event, Performance, or Exhibit</b> | 3.4%  | 6.6%  |
| <b>Relocating to Hilton Head/Bluffton area</b>                     | 2.0%  | 0.8%  |
| <b>N</b>   | 149   | 608   |

TABLE 14: Trip Purpose of Overnight Visitors

**Day Trip Visitors:**

**Was this visit part of an overnight vacation or a day trip from home?**

|                           | 2021  | 2022  |
|---------------------------|-------|-------|
| <b>Part of a vacation</b> | 50.0% | 85.2% |
| <b>Day trip from home</b> | 50.0% | 14.8% |
| <b>N</b>                  | 28    | 54    |

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

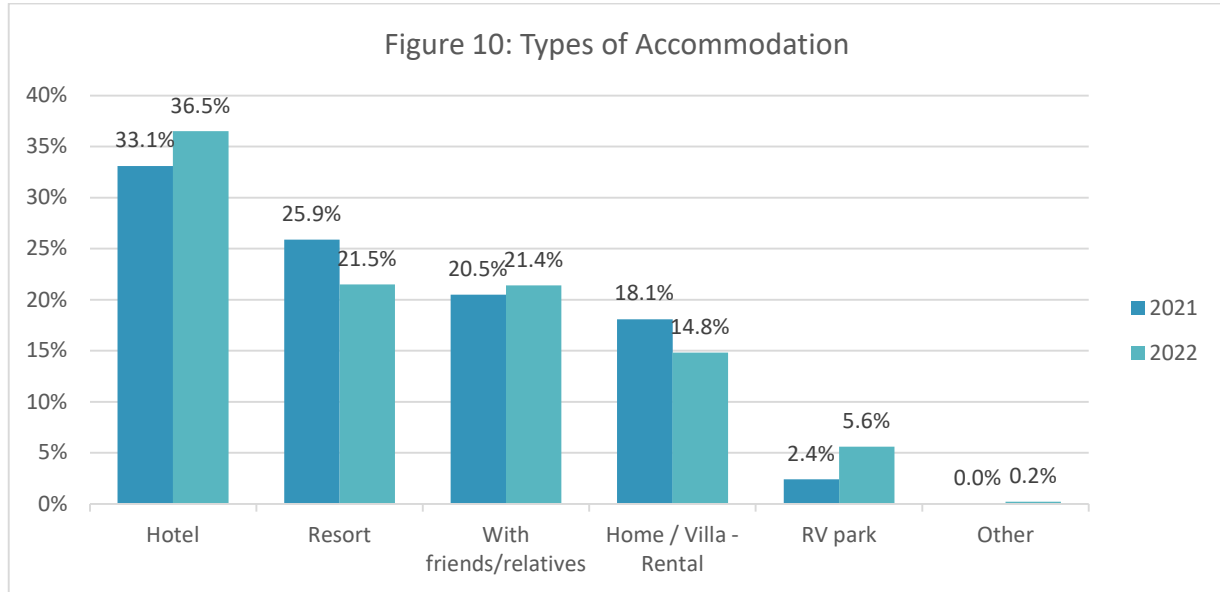
**Where did you stay overnight?**

|                     | 2021  | 2022  |
|---------------------|-------|-------|
| <b>Charleston</b>   | 18.2% | 39.1% |
| <b>Tybee Island</b> | -     | 28.3% |
| <b>Beaufort</b>     | 18.2% | 17.4% |
| <b>Savannah</b>     | 45.5% | 8.7%  |
| <b>Jacksonville</b> | 9.1%  | 2.2%  |
| <b>Other</b>        | 9.1%  | 4.3%  |
| <b>N</b>            | 11    | 46    |

TABLE 16: Vacation Day Trip Visitors Overnight Location

**Overnight Visitors:**

**What was your primary form of accommodation while visiting Bluffton?**



|                               | 2021  | 2022  |
|-------------------------------|-------|-------|
| <b>Hotel</b>                  | 33.1% | 36.5% |
| <b>Resort</b>                 | 25.9% | 21.5% |
| <b>With friends/relatives</b> | 20.5% | 21.4% |
| <b>Home / Villa - Rental</b>  | 18.1% | 14.8% |
| <b>RV park</b>                | 2.4%  | 5.6%  |
| <b>Other</b>                  | -     | 0.2%  |
| <b>N</b>                      | 166   | 608   |

TABLE 17: Types of Accommodation

**What was the name of the Hotel/Resort where you stayed?**

|                                 |       |
|---------------------------------|-------|
| <b>Old Town Bluffton Inn</b>    | 24.5% |
| <b>Comfort Suites</b>           | 16.8% |
| <b>Montage Palmetto Bluff</b>   | 16.1% |
| <b>Hampton Inn &amp; Suites</b> | 10.5% |
| <b>Candlewood Suites</b>        | 6.3%  |
| <b>Comfort Inn</b>              | 6.3%  |
| <b>America's Best Value Inn</b> | 4.9%  |
| <b>Hilton Garden Inn</b>        | 3.5%  |
| <b>Holiday Inn Express</b>      | 2.8%  |
| <b>Palmera Inn and Suites</b>   | 2.8%  |
| <b>N</b>                        | 143   |

TABLE 18: Top 10 Hotels or Resorts

**Which of the following online platforms did you use to make your home/villa reservation?**

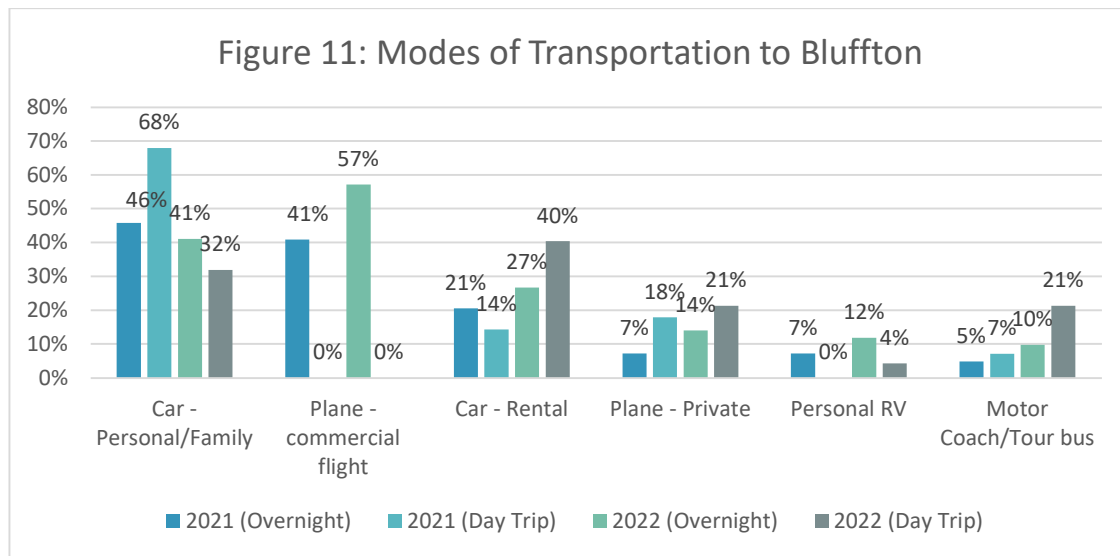
|  |       |
|--|-------|
| <b>Airbnb</b>                          | 31.1% |
| <b>Directly with the resort</b>        | 23.3% |
| <b>HomeAway</b>                        | 10.0% |
| <b>TurnKey</b>                         | 8.9%  |
| <b>A local vacation rental company</b> | 7.8%  |
| <b>Booking.com</b>                     | 7.8%  |
| <b>VRBO</b>                            | 4.4%  |
| <b>Vacasa</b>                          | 3.3%  |
| <b>None</b>                            | 3.3%  |
| <b>N</b>                               | 90    |

TABLE 19: Booking Platforms for Home/Villa Rental

**What type of transportation did you use to travel to Bluffton?**

|                                     | 2021<br>(Overnight) | 2021<br>(Day Trip) | 2022<br>(Overnight) | 2022<br>(Day Trip) |
|-------------------------------------|---------------------|--------------------|---------------------|--------------------|
| Car - Personal/Family               | 45.8%               | 67.9%              | 36.7%               | 27.8%              |
| Plane - Non-stop commercial flight  | 30.1%               | -                  | 30.3%               | -                  |
| Car - Rental                        | 20.5%               | 14.3%              | 23.8%               | 35.2%              |
| Plane - Multi-leg commercial flight | 10.8%               | -                  | 20.7%               | -                  |
| Plane - Private                     | 7.2%                | 17.9%              | 12.5%               | 18.5%              |
| Personal RV                         | 7.2%                | -                  | 10.5%               | 3.7%               |
| Motor Coach/Tour bus                | 4.8%                | 7.1%               | 8.7%                | 18.5%              |
| <b>N</b>                            | <b>166</b>          | <b>28</b>          | <b>608</b>          | <b>54</b>          |

TABLE 20: Modes of Transportation to Bluffton



**Visitors Arriving by Plane:**

**At which airport did you land?**

|   |            |
|---|------------|
| Hilton Head Island                        | 28.5%      |
| Charleston                                | 23.9%      |
| Savannah/Hilton Head Island International | 20.6%      |
| Atlanta                                   | 16.3%      |
| Jacksonville                              | 8.0%       |
| Charlotte                                 | 2.8%       |
| <b>N</b>                                  | <b>326</b> |

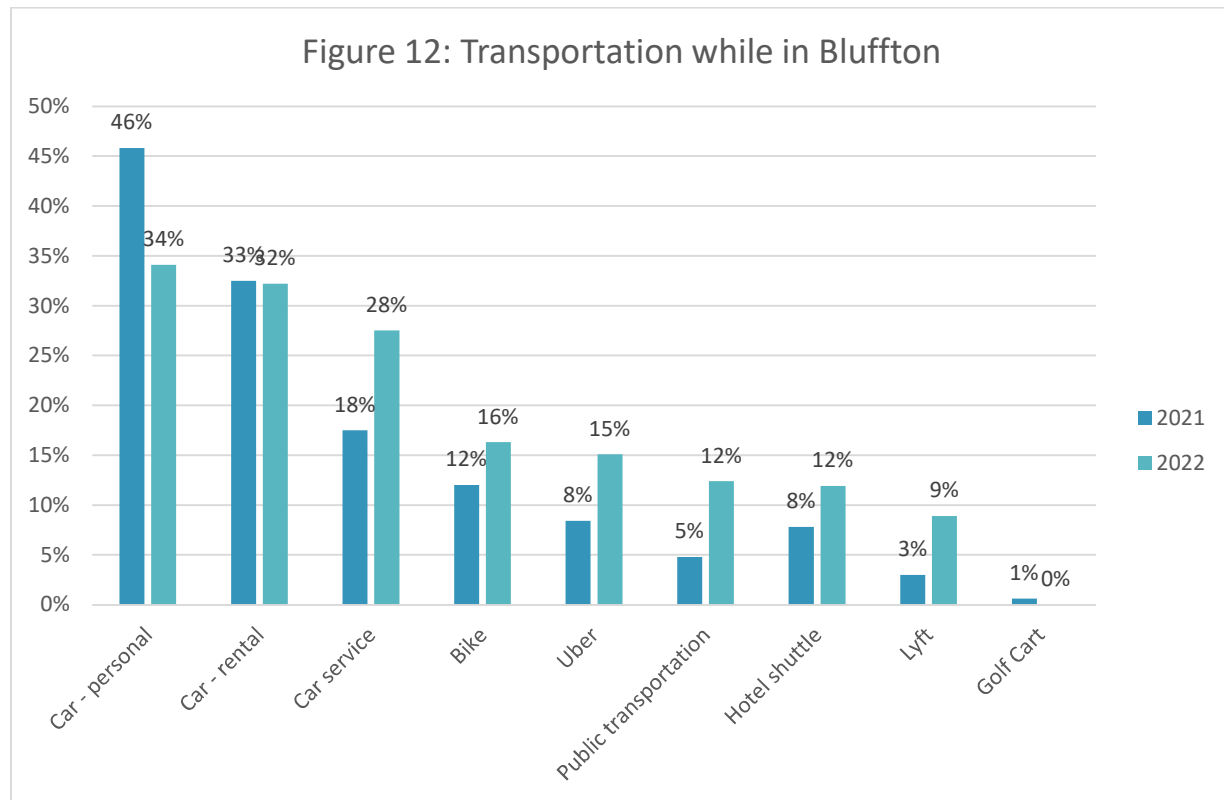
TABLE 21: Arrival Airport by Year

**Which commercial airline did you use?**

|                   |            |
|-------------------|------------|
| American Airlines | 40.3%      |
| Alaska            | 14.2%      |
| Allegiant         | 10.4%      |
| Air Canada        | 7.5%       |
| Breeze            | 6.0%       |
| Delta             | 5.6%       |
| Frontier          | 4.9%       |
| Southwest         | 4.9%       |
| JetBlue           | 3.0%       |
| Silver Airways    | 3.0%       |
| Other             | 0.4%       |
| <b>N</b>          | <b>268</b> |

TABLE 22: Commercial Airlines Used

Once in Bluffton, what mode(s) of transportation did you use?



|  | 2021  | 2022  |
|--|-------|-------|
| <b>Car - personal</b>                            | 45.8% | 34.1% |
| <b>Car - rental</b>                              | 32.5% | 32.2% |
| <b>Car service</b>                               | 17.5% | 27.5% |
| <b>Bike</b>                                      | 12.0% | 16.3% |
| <b>Uber</b>                                      | 8.4%  | 15.1% |
| <b>Public transportation (HHI Trolley, etc.)</b> | 4.8%  | 12.4% |
| <b>Shuttle offered by the hotel/resort</b>       | 7.8%  | 11.9% |
| <b>Lyft</b>                                      | 3.0%  | 8.9%  |
| <b>Golf Cart</b>                                 | 0.6%  | -     |
| <b>N</b>   | 166   | 608   |

TABLE 23: Transportation Used While In Bluffton

Please indicate the approximate total amount of money that was spent by your party/group for each category while in the Bluffton area.

|                          | Overnight         | Day Trip        | Overall           |
|--------------------------|-------------------|-----------------|-------------------|
| Transportation           | \$235.32          | \$64.38         | \$228.56          |
| Lodging                  | \$679.77          | \$0.00          | \$652.92          |
| Food - Dining            | \$525.56          | \$180.31        | \$511.82          |
| Food - Grocery           | \$196.32          | \$88.75         | \$192.07          |
| Shopping                 | \$531.10          | \$232.00        | \$519.97          |
| Spas                     | \$71.80           | \$44.29         | \$70.79           |
| Golf                     | \$61.98           | \$37.50         | \$61.01           |
| Biking                   | \$23.56           | \$7.50          | \$22.92           |
| Performance/Visual Arts  | \$60.33           | \$51.25         | \$59.97           |
| Festivals                | \$57.50           | \$28.75         | \$56.37           |
| Museums/Historical Tours | \$60.72           | \$76.25         | \$61.34           |
| Boating/Sailing/Fishing  | \$91.05           | \$47.50         | \$89.32           |
| Nature-based Activities  | \$41.02           | \$3.75          | \$39.53           |
| Dolphin Tours            | \$42.40           | \$6.25          | \$40.96           |
| Tennis                   | \$20.76           | \$0.00          | \$19.94           |
| Other Expenses           | \$178.60          | \$7.50          | \$171.74          |
| <b>Total Expenditure</b> | <b>\$2,862.66</b> | <b>\$855.94</b> | <b>\$2,783.38</b> |

Table 24: Average Per Travel Party Trip Expenditures by Category and Visitor Type

What are the three primary reasons why you visited Bluffton?

|   | 2021<br>(Overnight) | 2021<br>(Day Trip) | 2022<br>(Overnight) | 2022<br>(Day Trip) |
|---|---------------------|--------------------|---------------------|--------------------|
| Beaches   | 33.1%               | 53.6%              | 30.3%               | 27.8%              |
| Heritage attractions / Museum / Historical tours              | 22.3%               | 25.0%              | 17.6%               | 13.0%              |
| Time with family/friends                                      | 22.3%               | 21.4%              | 23.5%               | 5.6%               |
| Relaxation  | 21.7%               | -                  | 11.0%               | 9.3%               |
| Boating / Sailing / Kayaking                                  | 21.1%               | 7.1%               | 22.7%               | 20.4%              |
| Nature-based activities (dolphin/turtle tours, fishing, etc.) | 16.9%               | 3.6%               | 16.1%               | 3.7%               |
| Biking  | 15.7%               | 14.3%              | 23.2%               | 37.0%              |
| Business trip (convention, meeting, etc.)                     | 15.1%               | 10.7%              | 22.7%               | 37.0%              |
| Shopping  | 14.5%               | 28.6%              | 16.4%               | 11.1%              |
| Culinary  | 12.0%               | 32.1%              | 10.2%               | 37.0%              |
| Golf  | 11.4%               | 3.6%               | 7.9%                | 13.0%              |
| Attend sporting event   | 10.2%               | 25.0%              | 12.2%               | 11.1%              |
| Health/wellness/fitness                                       | 10.2%               | 7.1%               | 11.7%               | 5.6%               |
| Festivals   | 7.8%                | 3.6%               | 12.8%               | 1.9%               |
| Parks   | 5.4%                | 7.1%               | 8.6%                | 7.4%               |
| <b>Heritage attractions / Museum / Historical tours</b>       | <b>4.8%</b>         | <b>7.1%</b>        | <b>17.6%</b>        | <b>13.0%</b>       |
| Tennis  | 2.4%                | 3.6%               | 4.9%                | 1.9%               |
| Wedding   | 2.4%                | -                  | 3.5%                | -                  |
| Other   |                     |                    | 1.2%                | 1.9%               |
| Performance/visual arts                                       | -                   | 3.6%               | -                   | -                  |
| <b>N</b>  | <b>166</b>          | <b>28</b>          | <b>608</b>          | <b>54</b>          |

TABLE 25: Three Primary Reasons for Visitation

**Which of the following activities did you actively participate in?**

|   | 2021<br>(Overnight) | 2021 (Day<br>Trip) | 2022<br>(Overnight) | 2022 (Day<br>Trip) |
|---|---------------------|--------------------|---------------------|--------------------|
| Beaches   | 40.4%               | 42.9%              | 40.6%               | 37.0%              |
| Biking  | 16.9%               | 7.1%               | 33.9%               | 27.8%              |
| Business/work   | 17.5%               | 14.3%              | 24.8%               | 9.3%               |
| Shopping  | 22.3%               | 50.0%              | 22.0%               | 18.5%              |
| Museum / Historical tours                                     | 19.3%               | 10.7%              | 21.5%               | 5.6%               |
| Culinary  | 17.5%               | 42.9%              | 21.2%               | 20.4%              |
| Nature-based activities (dolphin/turtle tours, fishing, etc.) | 24.1%               | -                  | 20.4%               | 9.3%               |
| Time with family/friends                                      | 24.1%               | 35.7%              | 20.4%               | 14.8%              |
| Health / Wellness / Fitness                                   | 16.3%               | 3.6%               | 19.6%               | 18.5%              |
| Festivals   | 12.7%               | 7.1%               | 19.1%               | 11.1%              |
| Attend sporting event   | 13.3%               | 14.3%              | 17.1%               | 16.7%              |
| Golf  | 12.7%               | 7.1%               | 16.1%               | 7.4%               |
| Music or theatrical performance / Visual arts exhibit         | 10.2%               | 7.1%               | 15.6%               | 3.7%               |
| Relaxation  | 25.9%               | 35.7%              | 15.3%               | 13.0%              |
| Spas  | 5.4%                | 3.6%               | 13.2%               | 3.7%               |
| Water excursions  | 11.4%               | 10.7%              | 9.5%                | 22.2%              |
| Sports activities   | 5.4%                | -                  | 9.2%                | 3.7%               |
| University visit / Education / Intellectual programs          | 4.2%                | 10.7%              | 8.2%                | 5.6%               |
| Tennis  | 5.4%                | -                  | 6.9%                | 1.9%               |
| Other   | 1.8%                | -                  | -                   | -                  |
| <b>N</b>  | <b>166</b>          | <b>28</b>          | <b>608</b>          | <b>54</b>          |

TABLE 26: Activities Visitors Participated In

### Which shopping locations did you visit?

|   | 2021<br>(Overnight) | 2021<br>(Day Trip) | 2022<br>(Overnight) | 2022<br>(Day Trip) |
|---|---------------------|--------------------|---------------------|--------------------|
| Downtown Bluffton                                       | 48.2%               | 39.3%              | 48.8%               | 50.0%              |
| Main Street Village                                     | 19.3%               | 17.9%              | 27.1%               | 18.5%              |
| Coligny Plaza   | 29.5%               | 25.0%              | 25.8%               | 37.0%              |
| Harbour Town  | 26.5%               | 17.9%              | 25.8%               | 33.3%              |
| Tanger Outlets  | 31.3%               | 53.6%              | 21.5%               | 9.3%               |
| Shelter Cove Harbour                                    | 21.7%               | 10.7%              | 20.9%               | 29.6%              |
| Shelter Cove Towne Centre                               | 18.1%               | 17.9%              | 20.2%               | 22.2%              |
| Buckwalter shopping areas                               | 15.7%               | 14.3%              | 19.9%               | 11.1%              |
| South Beach Marina                                      | 10.2%               | 3.6%               | 18.3%               | 9.3%               |
| The Shops at Sea Pines Center                           | 20.5%               | 7.1%               | 17.9%               | 16.7%              |
| Village at Wexford                                      | 12.7%               | -                  | 14.8%               | 11.1%              |
| Shopping areas off 278 (Target, Kroger, Best Buy, etc.) | 17.5%               | 28.6%              | 11.2%               | 18.5%              |
| Other   | 1.2%                | -                  |                     |                    |
| None  | 1.2%                | 3.6%               |                     |                    |
| <b>N</b>  | <b>166</b>          | <b>28</b>          | <b>608</b>          | <b>54</b>          |

TABLE 27: Shopping Locations Visited

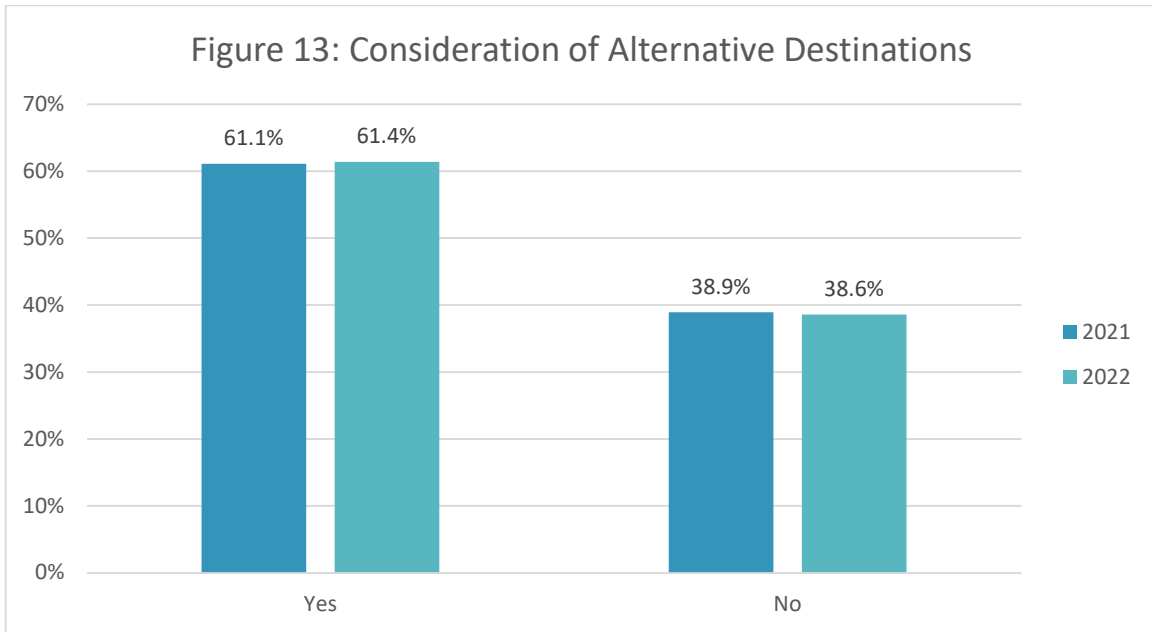
### Did you visit any of the following cities while staying in Bluffton?

|                                   | 2021       | 2022       |
|-----------------------------------|------------|------------|
| Hilton Head Island                | 50.6%      | 37.7%      |
| Charleston                        | 26.5%      | 33.7%      |
| Daufuskie Island                  | 15.1%      | 28.5%      |
| Beaufort                          | 25.9%      | 27.5%      |
| Jacksonville                      | 21.7%      | 27.3%      |
| Savannah                          | 27.7%      | 25.2%      |
| Tybee Island                      | 14.5%      | 15.3%      |
| Port Royal                        | 0.6%       | 0.3%       |
| I did not visit any other cities. | 4.2%       | 4.1%       |
| <b>N</b>                          | <b>166</b> | <b>608</b> |

TABLE 28: Other Cities Visited While Staying in Bluffton

**TRAVEL PLANNING**

**Before deciding to visit Bluffton, did you consider any other destinations?**



|            | 2021  | 2022  |
|------------|-------|-------|
| <b>Yes</b> | 61.1% | 61.4% |
| <b>No</b>  | 38.9% | 38.6% |
| <b>N</b>   | 193   | 658   |

TABLE 29: Consideration of alternative destinations



## Which of the following destinations did you consider visiting?

|                          | 2021       | 2022       |
|--------------------------|------------|------------|
| Alabama Golf Trail       | 36.4%      | 38.1%      |
| Hawaiian Islands         | 22.0%      | 37.4%      |
| Gulf Shores, AL          | 22.0%      | 29.5%      |
| Orlando, FL              | 15.3%      | 28.7%      |
| Caribbean                | 22.0%      | 26.5%      |
| Isle of Palms, SC        | 22.0%      | 26.2%      |
| Marco Island/Naples      | 15.3%      | 24.3%      |
| Savannah, GA             | 9.3%       | 23.8%      |
| Telluride, CO            | 7.6%       | 23.5%      |
| Aspen, CA                | 36.4%      | 22.3%      |
| Reynolds Plantation, GA  | 9.3%       | 21.3%      |
| Sea Island, GA           | 9.3%       | 21.0%      |
| Outer Banks, NC          | 9.3%       | 20.3%      |
| Sandestin, FL            | 9.3%       | 18.3%      |
| Ponte Vedre, FL          | 9.3%       | 17.3%      |
| Kiawah Island, SC        | 22.0%      | 17.1%      |
| Pinehurst, NC            | 9.3%       | 16.3%      |
| Hilton Head, SC          | 22.0%      | 13.9%      |
| Sarasota, FL             | 9.3%       | 12.1%      |
| Sanibel Island, FL       | 9.3%       | 11.9%      |
| Napa/Sonoma, CA          | 15.3%      | 11.4%      |
| St. Simmons Island, GA   | 9.3%       | 10.6%      |
| Charleston, SC           | 22.0%      | 10.6%      |
| Tampa/St. Petersburg, FL | 7.6%       | 10.1%      |
| Tybee Island, GA         | 7.6%       | 8.7%       |
| Jekyll Island, GA        | 22.0%      | 8.4%       |
| Santa Fe, NM             | 9.3%       | 7.4%       |
| Myrtle Beach, SC         | 15.3%      | 6.9%       |
| The Florida Keys         | 7.6%       | 5.7%       |
| Other                    | 15.3%      | 17.3%      |
| <b>Total</b>             | <b>118</b> | <b>404</b> |

TABLE 30: Alternative Destinations by Year

### How did Bluffton make it to your list of places to consider for your vacation?

|  | 2021       | 2022       |
|--|------------|------------|
| Wanted to visit because of the nature-based attractions                | 23.3%      | 41.9%      |
| Wanted to visit heritage attractions                                   | 19.2%      | 35.7%      |
| It was recommended by friends/family                                   | 29.0%      | 35.5%      |
| Wanted to visit a beach destination                                    | 32.6%      | 34.9%      |
| Wanted to visit someplace new  | 16.6%      | 24.0%      |
| Had visited in the past and wanted to return                           | 28.0%      | 22.7%      |
| Discovered/learned about it on the internet/display ads/search engines | 20.2%      | 19.7%      |
| Saw an advertisement in a magazine/website/social media                | 17.1%      | 18.8%      |
| Wanted to visit some place within driving distance                     | 19.7%      | 18.4%      |
| Wanted to attend a cultural/performing arts event                      | 9.3%       | 15.8%      |
| Wanted to attend a sporting event                                      | 5.7%       | 13.7%      |
| Safe place to visit during or after COVID-19                           | 9.8%       | 11.7%      |
| Other  | 4.7%       | 1.3%       |
| <b>Total</b>   | <b>193</b> | <b>618</b> |

TABLE 31: Reasons for Visiting Hilton Head Island

### How likely are you to return to Bluffton?

|               | 2021       | 2022       |
|---------------|------------|------------|
| Very likely   | 59.4%      | 34.8%      |
| Likely        | 26.4%      | 33.0%      |
| Neutral       | 12.3%      | 24.3%      |
| Unlikely      | 0.9%       | 6.1%       |
| Very Unlikely | 0.9%       | 1.8%       |
| <b>Total</b>  | <b>106</b> | <b>618</b> |

TABLE 32: Likelihood of Visiting Bluffton Again

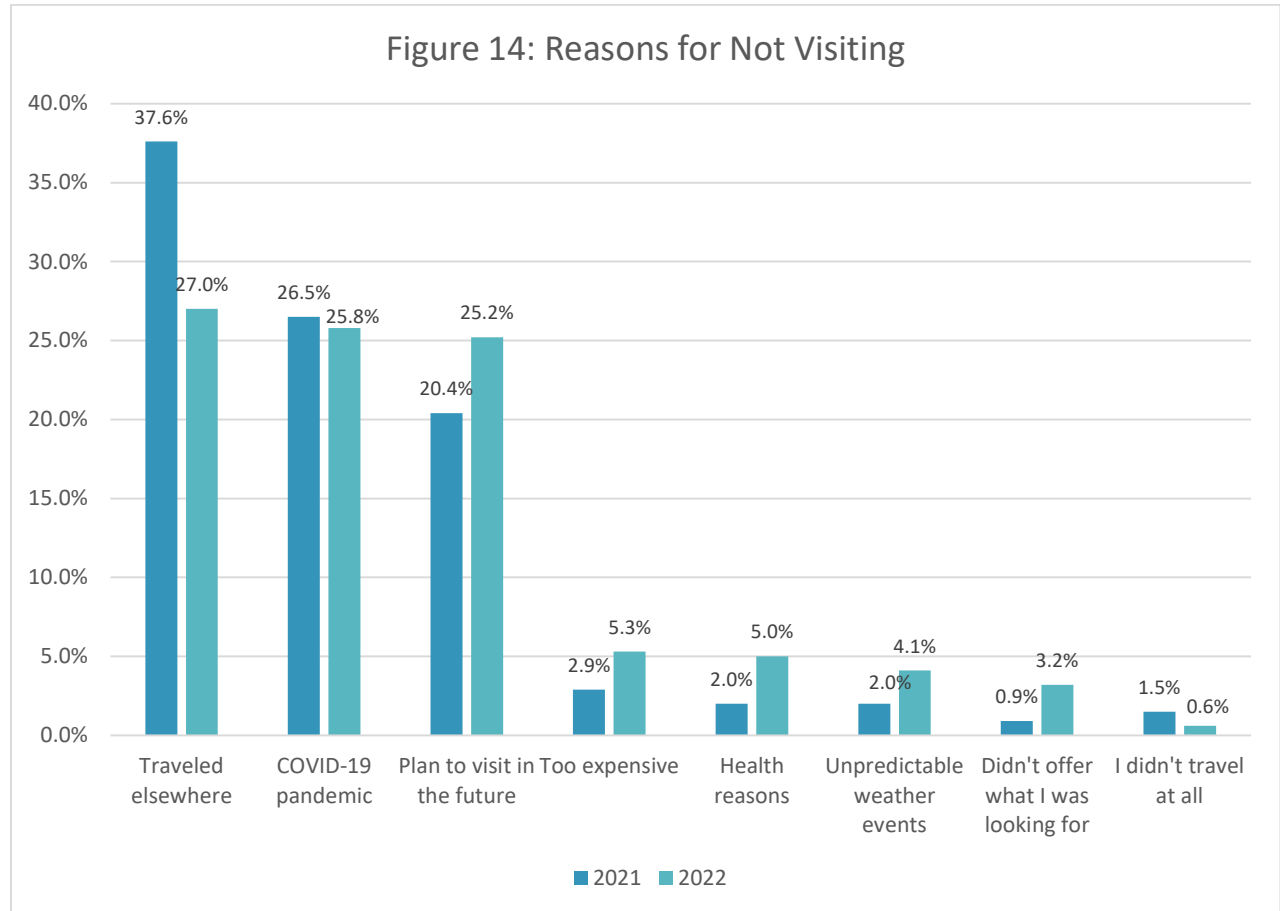
### How likely are you to recommend visiting Bluffton to a friend or family member?

|                          | 2021       | 2022       |
|--------------------------|------------|------------|
| Definitely Recommend     | 70.8%      | 39.4%      |
| Probably Recommend       | 20.8%      | 40.0%      |
| May or May Not Recommend | 7.5%       | 17.2%      |
| Probably Not Recommend   | 0.9%       | 3.1%       |
| Definitely Not Recommend | 0.0%       | 0.3%       |
| <b>Total</b>             | <b>106</b> | <b>635</b> |

TABLE 33: Likelihood of Recommending a Visit to Bluffton

**NON-VISITORS**

**Which of the following most accurately reflects why you did not visit Hilton Head Island-Bluffton during the last 12 months?**



|  | 2021  | 2022  |
|--|-------|-------|
| <b>Traveled elsewhere</b>                  | 37.6% | 27.0% |
| <b>COVID-19 pandemic</b>                   | 26.5% | 25.8% |
| <b>Plan to visit in the future</b>         | 20.4% | 25.2% |
| <b>Too expensive</b>                       | 2.9%  | 5.3%  |
| <b>Health reasons</b>                      | 2.0%  | 5.0%  |
| <b>Unpredictable weather events</b>        | 2.0%  | 4.1%  |
| <b>Didn't offer what I was looking for</b> | 0.9%  | 3.2%  |
| <b>I didn't travel at all</b>              | 1.5%  | 0.6%  |
| <b>Other</b>                               | 6.2%  | 3.8%  |
| <b>Total</b>                               | 860   | 341   |

TABLE 34: Reasons for not visiting

Please indicate the region(s) that you traveled to in the past 12 months.

|   | 2021       | 2022       |
|---|------------|------------|
| USA - Southeast (GA, FL, NC, SC)                                | 26.9%      | 33.7%      |
| USA - South (AL, AR, KY, LA, MS, OK, TN, TX)                    | 9.0%       | 22.3%      |
| USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)  | 10.5%      | 20.8%      |
| USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY) | 9.8%       | 19.6%      |
| USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)            | 9.1%       | 18.5%      |
| USA - South Atlantic (DE, DC, MD, VA, WV)                       | 8.0%       | 17.0%      |
| Canada  | 1.4%       | 10.9%      |
| Europe  | 1.2%       | 7.3%       |
| Latin America and Caribbean                                     | 2.1%       | 6.5%       |
| Asia  | 0.5%       | 4.4%       |
| Australia/New Zealand   | 0.2%       | 3.2%       |
| Africa  | 0.3%       | 1.2%       |
| Other   | 0.1%       | 2.1%       |
| <b>Total</b>  | <b>860</b> | <b>341</b> |

TABLE 35: Regions Visited by Non-Visitors in the Past 12 Months

How many times have you visited Hilton Head Island-Bluffton in the past 10 years?

|               | 2021       | 2022       |
|---------------|------------|------------|
| Never visited | 38.9%      | 42.9%      |
| 1             | 18.6%      | 14.0%      |
| 2 to 5        | 30.2%      | 36.4%      |
| 6 to 10       | 9.8%       | 5.0%       |
| 11 to 20      | 1.9%       | 0.9%       |
| 21 or more    | 0.9%       | 0.5%       |
| <b>Total</b>  | <b>860</b> | <b>341</b> |

TABLE 36: Visitation Frequency in the Past 10 Years by Non-Visitors

Do you have plans to visit Hilton Head Island-Bluffton in the near future?

|                        | 2021       | 2022       |
|------------------------|------------|------------|
| Yes, within one year   | 49.2%      | 50.1%      |
| Yes, but not sure when | 42.5%      | 49.0%      |
| No                     | 8.3%       | 0.9%       |
| <b>Total</b>           | <b>859</b> | <b>341</b> |

TABLE 37: Plans of visiting Hilton Head Island in the Future by Non-Visitors

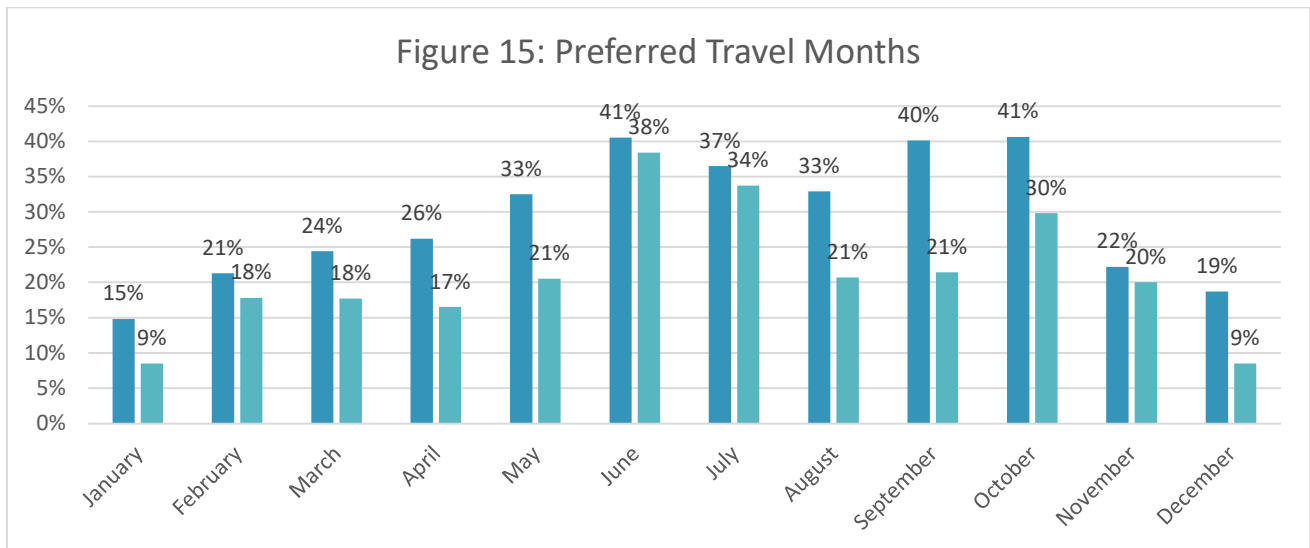
### TRAVEL BEHAVIOR – ALL RESPONDENTS

On average, approximately how many leisure/vacation trips do you take each year?

|                     | 2021  | 2022  |
|---------------------|-------|-------|
| <b>0 to 1</b>       | 15.3% | 10.0% |
| <b>2 to 4</b>       | 55.1% | 47.3% |
| <b>5 to 7</b>       | 19.2% | 29.9% |
| <b>8 to 10</b>      | 6.3%  | 8.2%  |
| <b>More than 10</b> | 4.1%  | 4.7%  |
| <b>Total</b>        | 1,042 | 984   |

TABLE 38: Frequency of Leisure/Vacation Trips

Which month(s) are you most likely to travel for vacation purposes?



|                  | 2021  | 2022  |
|------------------|-------|-------|
| <b>January</b>   | 14.8% | 8.5%  |
| <b>February</b>  | 21.3% | 17.8% |
| <b>March</b>     | 24.4% | 17.7% |
| <b>April</b>     | 26.2% | 16.5% |
| <b>May</b>       | 32.5% | 20.5% |
| <b>June</b>      | 40.5% | 38.4% |
| <b>July</b>      | 36.5% | 33.7% |
| <b>August</b>    | 32.9% | 20.7% |
| <b>September</b> | 40.1% | 21.4% |
| <b>October</b>   | 40.6% | 29.8% |
| <b>November</b>  | 22.2% | 20.0% |
| <b>December</b>  | 18.7% | 8.5%  |
| <b>Total</b>     | 1,042 | 984   |

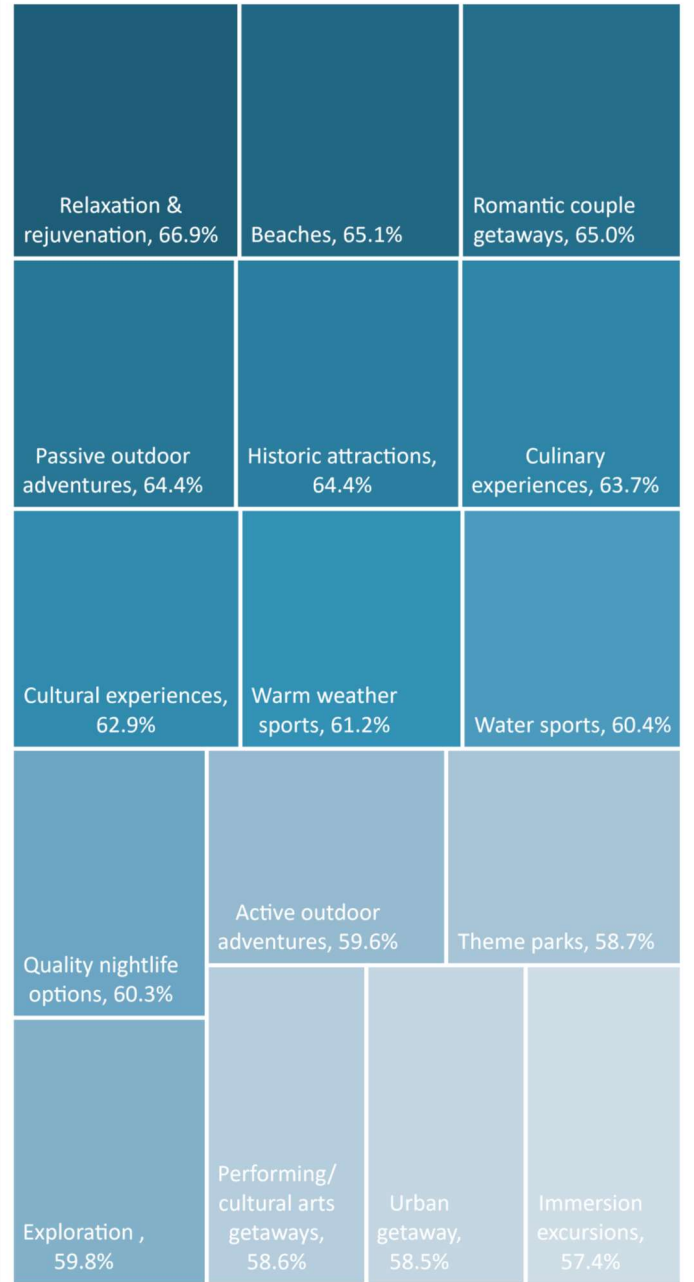
TABLE 39: Preferred Travel Months

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

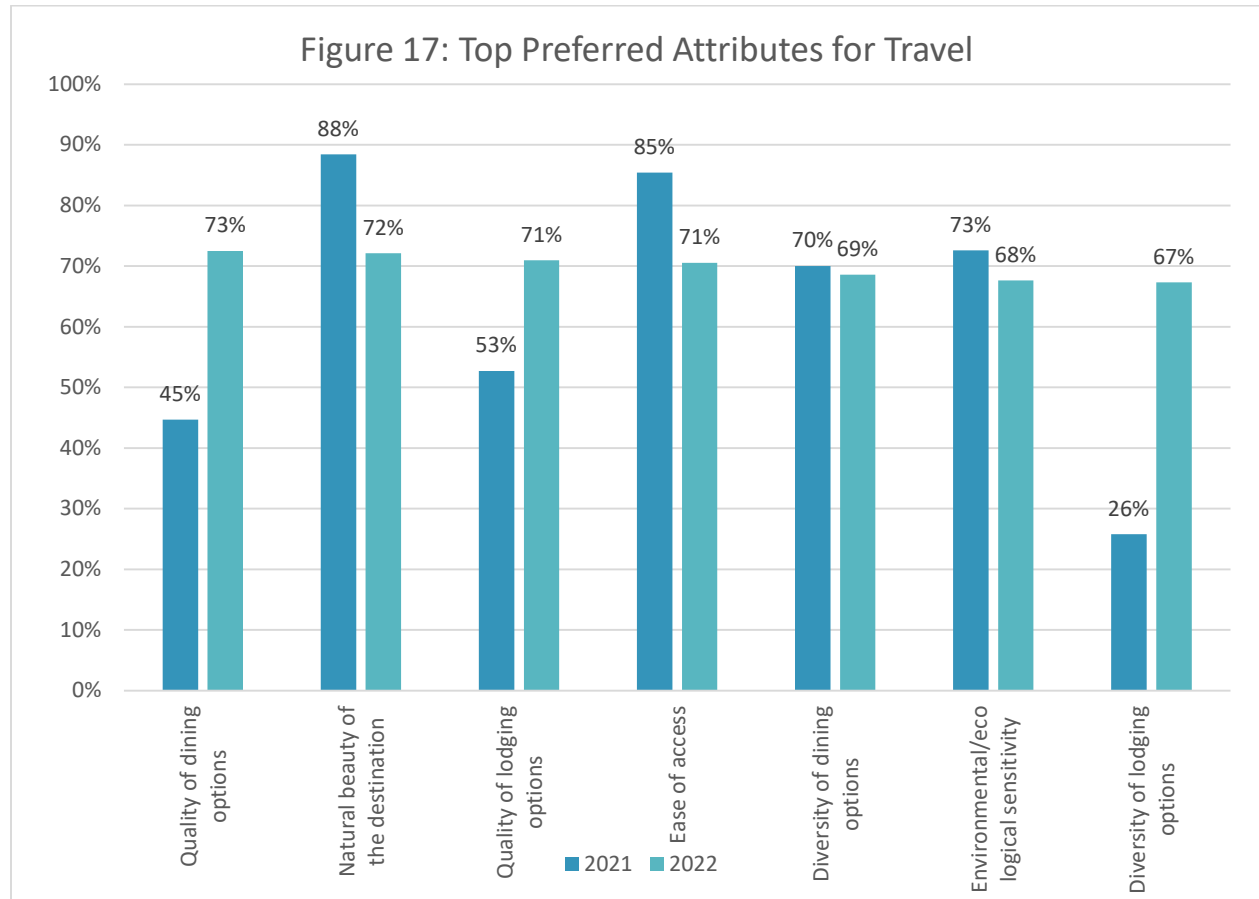
| “Appealing” + “Very Appealing”    | 2021       | 2022         |
|-----------------------------------|------------|--------------|
| Relaxation & rejuvenation         | 85.4%      | 66.9%        |
| Beaches                           | 88.4%      | 65.1%        |
| Romantic couple getaways          | 70.0%      | 65.0%        |
| Passive outdoor adventures        | 72.6%      | 64.4%        |
| Historic attractions              | 75.5%      | 64.4%        |
| Culinary experiences              | 70.1%      | 63.7%        |
| Cultural experiences              | 70.7%      | 62.9%        |
| Warm weather sports               | 52.7%      | 61.2%        |
| Water sports                      | 48.8%      | 60.4%        |
| Quality nightlife options         | 52.6%      | 60.3%        |
| Exploration                       | 57.5%      | 59.8%        |
| Active outdoor adventures         | 46.8%      | 59.6%        |
| Theme parks                       | 44.7%      | 58.7%        |
| Performing/cultural arts getaways | 51.2%      | 58.6%        |
| Urban getaway                     | 48.4%      | 58.5%        |
| Immersion excursions              | 49.6%      | 57.4%        |
| Art                               | 49.8%      | 57.1%        |
| Spectator sporting events         | 49.2%      | 57.0%        |
| Learning while traveling          | 60.9%      | 56.3%        |
| Medical/wellness                  | 40.8%      | 55.5%        |
| Luxury camping                    | 39.9%      | 55.0%        |
| Waterparks                        | 40.3%      | 54.4%        |
| Winter sports                     | 30.2%      | 53.9%        |
| Golf getaways                     | 37.4%      | 50.6%        |
| Voluntourism                      | 29.5%      | 49.9%        |
| Tennis getaways                   | 25.8%      | 48.5%        |
| <b>Total</b>                      | <b>949</b> | <b>1,005</b> |

TABLE 40: Preferred Vacation/Leisure Travel Experiences

Figure 16: Preferred Travel Experiences



**How important are the following attributes to you in choosing a leisure vacation?**



| “Important” + “Very Important”                 | 2021       | 2022         |
|--|------------|--------------|
| Quality of dining options                      | 44.7%      | 72.5%        |
| Natural beauty of the destination              | 88.4%      | 72.1%        |
| Quality of lodging options                     | 52.7%      | 71.0%        |
| Ease of access                                 | 85.4%      | 70.5%        |
| Diversity of dining options                    | 70.0%      | 68.6%        |
| Environmental/ecological sensitivity           | 72.6%      | 67.6%        |
| Diversity of lodging options                   | 25.8%      | 67.3%        |
| Affordability                                  | 75.5%      | 67.2%        |
| Low traffic congestion                         | 60.9%      | 64.8%        |
| Activities like events/festivals               | 49.6%      | 64.2%        |
| Travel distance                                | 70.7%      | 63.1%        |
| Nightlife activity options                     | 48.4%      | 61.4%        |
| Medical/wellness                               | 37.4%      | 60.4%        |
| Access to other cities in the surrounding area | 46.8%      | 58.8%        |
| Public transportation                          | 57.5%      | 57.0%        |
| <b>Total</b>                                   | <b>949</b> | <b>1,005</b> |

TABLE 41: Preferred Attributes for Vacation/Leisure Travel

Please indicate the extent to which you agree with the following statements.

|   | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree |
|---|----------------|-------|----------------------------|----------|-------------------|
| <b>I would rather rely on a travel agent or tour operator than make my own travel arrangements.</b> | 10.9%          | 25.9% | 31.9%                      | 20.6%    | 10.8%             |
| <b>I try to support the local economy of places that I visit.</b>                                   | 22.1%          | 42.0% | 21.8%                      | 10.9%    | 3.2%              |
| <b>N 973</b>  |                |       |                            |          |                   |

TABLE 42: Travel Preferences



## APPENDIX

## ALL ZIP CODES COLLECTED BY MSA

| MSA  | Count | Percent |
|--|-------|---------|
| New York-Newark-Jersey City, NY-NJ-PA          | 75    | 7.8%    |
| Fort Wayne, IN                                 | 41    | 4.4%    |
| Baltimore-Columbia-Towson, MD                  | 32    | 3.3%    |
| Los Angeles-Long Beach-Anaheim, CA             | 32    | 3.3%    |
| Seattle-Tacoma-Bellevue, WA                    | 29    | 3.0%    |
| Washington-Arlington-Alexandria, DC-VA-MD-WV   | 26    | 2.7%    |
| Chicago-Naperville-Elgin, IL-IN-WI             | 24    | 2.5%    |
| Rural North Dakota                             | 18    | 1.8%    |
| Dallas-Fort Worth-Arlington, TX                | 18    | 1.8%    |
| San Francisco-Oakland-Hayward, CA              | 17    | 1.7%    |
| Atlanta-Sandy Springs-Roswell, GA              | 17    | 1.7%    |
| Denver-Aurora-Lakewood, CO                     | 17    | 1.7%    |
| Indianapolis-Carmel-Anderson, IN               | 15    | 1.5%    |
| Boston-Cambridge-Newton, MA-NH                 | 14    | 1.4%    |
| Phoenix-Mesa-Scottsdale, AZ                    | 13    | 1.3%    |
| Philadelphia-Camden-Wilmington, PA-NJ-DE-MD    | 13    | 1.3%    |
| Detroit-Warren-Dearborn, MI                    | 12    | 1.2%    |
| Cleveland-Elyria, OH                           | 12    | 1.2%    |
| Miami-Fort Lauderdale-West Palm Beach, FL      | 11    | 1.1%    |
| Montgomery, AL                                 | 11    | 1.1%    |
| San Diego-Carlsbad, CA                         | 10    | 1.0%    |
| Houston-The Woodlands-Sugar Land, TX           | 9     | 0.9%    |
| Columbus, OH                                   | 9     | 0.9%    |
| Colorado Springs, CO                           | 9     | 0.9%    |
| Pittsburgh, PA                                 | 9     | 0.9%    |
| St. Louis, MO-IL                               | 9     | 0.9%    |
| Russellville, AR                               | 8     | 0.8%    |
| Easton, MD                                     | 8     | 0.8%    |
| Worcester, MA-CT                               | 8     | 0.8%    |
| San Jose-Sunnyvale-Santa Clara, CA             | 7     | 0.7%    |
| Sacramento--Roseville--Arden-Arcade, CA        | 7     | 0.7%    |
| Albany-Schenectady-Troy, NY                    | 7     | 0.7%    |
| Charlotte-Concord-Gastonia, NC-SC              | 7     | 0.7%    |
| Kansas City, MO-KS                             | 7     | 0.7%    |
| Oklahoma City, OK                              | 7     | 0.7%    |
| Raleigh, NC                                    | 7     | 0.7%    |
| Macon, GA                                      | 6     | 0.6%    |
| Nashville-Davidson--Murfreesboro--Franklin, TN | 6     | 0.6%    |

| MSA  | Count | Percent |
|--|-------|---------|
| San Antonio-New Braunfels, TX              | 6     | 0.6%    |
| Anchorage, AK                              | 6     | 0.6%    |
| Binghamton, NY                             | 6     | 0.6%    |
| Fresno, CA                                 | 6     | 0.6%    |
| Savannah, GA                               | 6     | 0.6%    |
| Louisville/Jefferson County, KY-IN         | 5     | 0.5%    |
| Minneapolis-St. Paul-Bloomington, MN-WI    | 5     | 0.5%    |
| Albuquerque, NM                            | 5     | 0.5%    |
| Allentown-Bethlehem-Easton, PA-NJ          | 5     | 0.5%    |
| Hilton Head Island-Bluffton-Beaufort, SC   | 5     | 0.5%    |
| Austin-Round Rock, TX                      | 5     | 0.5%    |
| El Paso, TX                                | 5     | 0.5%    |
| Fergus Falls, MN                           | 5     | 0.5%    |
| Las Vegas-Henderson-Paradise, NV           | 5     | 0.5%    |
| Portland-Vancouver-Hillsboro, OR-WA        | 5     | 0.5%    |
| Cincinnati, OH-KY-IN                       | 5     | 0.5%    |
| Fargo, ND-MN                               | 5     | 0.5%    |
| Richmond, VA                               | 5     | 0.5%    |
| Saginaw, MI                                | 4     | 0.4%    |
| Birmingham-Hoover, AL                      | 4     | 0.4%    |
| Panama City, FL                            | 4     | 0.4%    |
| Virginia Beach-Norfolk-Newport News, VA-NC | 4     | 0.4%    |
| Alamogordo, NM                             | 4     | 0.4%    |
| Jacksonville, FL                           | 4     | 0.4%    |
| Lexington-Fayette, KY                      | 4     | 0.4%    |
| Providence-Warwick, RI-MA                  | 4     | 0.4%    |
| Spokane-Spokane Valley, WA                 | 4     | 0.4%    |
| Stockton-Lodi, CA                          | 4     | 0.4%    |
| Waterloo-Cedar Falls, IA                   | 3     | 0.3%    |
| Fayetteville-Springdale-Rogers, AR-MO      | 3     | 0.3%    |
| Columbus, GA-AL                            | 3     | 0.3%    |
| Bridgeport-Stamford-Norwalk, CT            | 3     | 0.3%    |
| Columbia, SC                               | 3     | 0.3%    |
| Hartford-West Hartford-East Hartford, CT   | 3     | 0.3%    |
| Huntsville, AL                             | 3     | 0.3%    |
| Memphis, TN-MS-AR                          | 3     | 0.3%    |
| Peoria, IL                                 | 3     | 0.3%    |
| Salinas, CA                                | 3     | 0.3%    |
| Tampa-St. Petersburg-Clearwater, FL        | 3     | 0.3%    |
| Waycross, GA                               | 3     | 0.3%    |
| Youngstown-Warren-Boardman, OH-PA          | 3     | 0.3%    |
| Niles-Benton Harbor, MI                    | 2     | 0.2%    |

| MSA   | Count | Percent |
|---|-------|---------|
| Daphne-Fairhope-Foley, AL                     | 2     | 0.2%    |
| Augusta-Richmond County, GA-SC                | 2     | 0.2%    |
| Portland-South Portland, ME                   | 2     | 0.2%    |
| Edwards, CO                                   | 2     | 0.2%    |
| San Luis Obispo-Paso Robles-Arroyo Grande, CA | 2     | 0.2%    |
| Claremont-Lebanon, NH-VT                      | 2     | 0.2%    |
| Riverside-San Bernardino-Ontario, CA          | 2     | 0.2%    |
| Bismarck, ND                                  | 2     | 0.2%    |
| Springfield, IL                               | 2     | 0.2%    |
| Buffalo-Cheektowaga-Niagara Falls, NY         | 2     | 0.2%    |
| Fayetteville, NC                              | 2     | 0.2%    |
| Salt Lake City, UT                            | 2     | 0.2%    |
| Terre Haute, IN                               | 2     | 0.2%    |
| Charleston, WV                                | 2     | 0.2%    |
| New Orleans-Metairie, LA                      | 2     | 0.2%    |
| North Port-Sarasota-Bradenton, FL             | 2     | 0.2%    |
| Rural Wyoming                                 | 2     | 0.2%    |
| Springfield, MA                               | 2     | 0.2%    |
| Tifton, GA                                    | 2     | 0.2%    |
| Toledo, OH                                    | 2     | 0.2%    |
| Tucson, AZ                                    | 2     | 0.2%    |
| Tulsa, OK                                     | 2     | 0.2%    |
| Urban Honolulu, HI                            | 2     | 0.2%    |
| Vallejo-Fairfield, CA                         | 2     | 0.2%    |
| Baton Rouge, LA                               | 2     | 0.2%    |
| Boise City, ID                                | 2     | 0.2%    |
| Charleston-North Charleston, SC               | 2     | 0.2%    |
| Grand Junction, CO                            | 2     | 0.2%    |
| Lansing-East Lansing, MI                      | 2     | 0.2%    |
| Myrtle Beach-Conway-North Myrtle Beach, SC-NC | 2     | 0.2%    |
| New Haven-Milford, CT                         | 2     | 0.2%    |
| Palm Bay-Melbourne-Titusville, FL             | 2     | 0.2%    |
| Rural Alaska                                  | 2     | 0.2%    |
| Rural Missouri                                | 2     | 0.2%    |
| Rural North Carolina                          | 2     | 0.2%    |
| Rural Texas                                   | 2     | 0.2%    |
| Trenton, NJ                                   | 2     | 0.2%    |
| Valdosta, GA                                  | 2     | 0.2%    |
| Freeport, IL                                  | 1     | 0.1%    |
| Aberdeen, WA                                  | 1     | 0.1%    |
| Bardstown, KY                                 | 1     | 0.1%    |
| Sioux City, IA-NE-SD                          | 1     | 0.1%    |

| MSA                                      | Count | Percent |
|--|-------|---------|
| Chico, CA                                | 1     | 0.1%    |
| Rural Ohio                               | 1     | 0.1%    |
| Jackson, MI                              | 1     | 0.1%    |
| Bowling Green, KY                        | 1     | 0.1%    |
| Pine Bluff, AR                           | 1     | 0.1%    |
| Coeur d'Alene, ID                        | 1     | 0.1%    |
| Dublin, GA                               | 1     | 0.1%    |
| Montrose, CO                             | 1     | 0.1%    |
| Columbia, MO                             | 1     | 0.1%    |
| Cookeville, TN                           | 1     | 0.1%    |
| Huntington, IN                           | 1     | 0.1%    |
| Stillwater, OK                           | 1     | 0.1%    |
| Yakima, WA                               | 1     | 0.1%    |
| Chattanooga, TN-GA                       | 1     | 0.1%    |
| Ketchikan, AK                            | 1     | 0.1%    |
| Olean, NY                                | 1     | 0.1%    |
| Reading, PA                              | 1     | 0.1%    |
| Ann Arbor, MI                            | 1     | 0.1%    |
| Gainesville, FL                          | 1     | 0.1%    |
| Marion, OH                               | 1     | 0.1%    |
| Natchitoches, LA                         | 1     | 0.1%    |
| Scranton--Wilkes-Barre--Hazleton, PA     | 1     | 0.1%    |
| Amarillo, TX                             | 1     | 0.1%    |
| Austin, MN                               | 1     | 0.1%    |
| Elmira, NY                               | 1     | 0.1%    |
| Findlay, OH                              | 1     | 0.1%    |
| Laurel, MS                               | 1     | 0.1%    |
| Minot, ND                                | 1     | 0.1%    |
| Price, UT                                | 1     | 0.1%    |
| Jacksonville, IL                         | 1     | 0.1%    |
| Little Rock-North Little Rock-Conway, AR | 1     | 0.1%    |
| Parkersburg-Vienna, WV                   | 1     | 0.1%    |
| Pullman, WA                              | 1     | 0.1%    |
| Salina, KS                               | 1     | 0.1%    |
| Summit Park, UT                          | 1     | 0.1%    |
| Visalia-Porterville, CA                  | 1     | 0.1%    |
| Barre, VT                                | 1     | 0.1%    |
| Hutchinson, MN                           | 1     | 0.1%    |
| Meridian, MS                             | 1     | 0.1%    |
| Peru, IN                                 | 1     | 0.1%    |
| Watertown-Fort Drum, NY                  | 1     | 0.1%    |
| Wichita, KS                              | 1     | 0.1%    |

| MSA                                    | Count | Percent |
|--|-------|---------|
| Beckley, WV                            | 1     | 0.1%    |
| Blacksburg-Christiansburg-Radford, VA  | 1     | 0.1%    |
| Burlington-South Burlington, VT        | 1     | 0.1%    |
| Clearlake, CA                          | 1     | 0.1%    |
| Decatur, AL                            | 1     | 0.1%    |
| Grand Rapids-Wyoming, MI               | 1     | 0.1%    |
| New Philadelphia-Dover, OH             | 1     | 0.1%    |
| Oil City, PA                           | 1     | 0.1%    |
| Rocky Mount, NC                        | 1     | 0.1%    |
| Rural Colorado                         | 1     | 0.1%    |
| Rural Nebraska                         | 1     | 0.1%    |
| Santa Rosa, CA                         | 1     | 0.1%    |
| St. Cloud, MN                          | 1     | 0.1%    |
| Torrington, CT                         | 1     | 0.1%    |
| Urbana, OH                             | 1     | 0.1%    |
| Amsterdam, NY                          | 1     | 0.1%    |
| Appleton, WI                           | 1     | 0.1%    |
| Barnstable Town, MA                    | 1     | 0.1%    |
| Big Spring, TX                         | 1     | 0.1%    |
| Bradford, PA                           | 1     | 0.1%    |
| Brainerd, MN                           | 1     | 0.1%    |
| Cedar Rapids, IA                       | 1     | 0.1%    |
| Centralia, WA                          | 1     | 0.1%    |
| Chambersburg-Waynesboro, PA            | 1     | 0.1%    |
| Charleston-Mattoon, IL                 | 1     | 0.1%    |
| Corning, NY                            | 1     | 0.1%    |
| Crestview-Fort Walton Beach-Destin, FL | 1     | 0.1%    |
| Durango, CO                            | 1     | 0.1%    |
| Florence, SC                           | 1     | 0.1%    |
| Greeley, CO                            | 1     | 0.1%    |
| Greensboro-High Point, NC              | 1     | 0.1%    |
| Greenville-Anderson-Mauldin, SC        | 1     | 0.1%    |
| Greenwood, SC                          | 1     | 0.1%    |
| Harrisburg-Carlisle, PA                | 1     | 0.1%    |
| Jackson, MS                            | 1     | 0.1%    |
| Jackson, TN                            | 1     | 0.1%    |
| Jackson, WY-ID                         | 1     | 0.1%    |
| Jamestown-Dunkirk-Fredonia, NY         | 1     | 0.1%    |
| Jamestown, ND                          | 1     | 0.1%    |
| Johnson City, TN                       | 1     | 0.1%    |
| Juneau, AK                             | 1     | 0.1%    |
| Kill Devil Hills, NC                   | 1     | 0.1%    |

| MSA                              | Count | Percent |
|----------------------------------|-------|---------|
| Kingston, NY                     | 1     | 0.1%    |
| Lafayette, LA                    | 1     | 0.1%    |
| Las Vegas, NM                    | 1     | 0.1%    |
| Marquette, MI                    | 1     | 0.1%    |
| Marshall, MN                     | 1     | 0.1%    |
| Mason City, IA                   | 1     | 0.1%    |
| Modesto, CA                      | 1     | 0.1%    |
| Mount Pleasant, TX               | 1     | 0.1%    |
| Mount Vernon-Anacortes, WA       | 1     | 0.1%    |
| New Bern, NC                     | 1     | 0.1%    |
| Nogales, AZ                      | 1     | 0.1%    |
| Omaha-Council Bluffs, NE-IA      | 1     | 0.1%    |
| Orlando-Kissimmee-Sanford, FL    | 1     | 0.1%    |
| Oxnard-Thousand Oaks-Ventura, CA | 1     | 0.1%    |
| Paducah, KY-IL                   | 1     | 0.1%    |
| Parsons, KS                      | 1     | 0.1%    |
| Pensacola-Ferry Pass-Brent, FL   | 1     | 0.1%    |
| Prescott, AZ                     | 1     | 0.1%    |
| Redding, CA                      | 1     | 0.1%    |
| Reno, NV                         | 1     | 0.1%    |
| Rural Iowa                       | 1     | 0.1%    |
| Rural New York                   | 1     | 0.1%    |
| Rural South Dakota               | 1     | 0.1%    |
| Santa Maria-Santa Barbara, CA    | 1     | 0.1%    |
| South Bend-Mishawaka, IN-MI      | 1     | 0.1%    |
| Spartanburg, SC                  | 1     | 0.1%    |
| Spearfish, SD                    | 1     | 0.1%    |
| Spencer, IA                      | 1     | 0.1%    |
| Spirit Lake, IA                  | 1     | 0.1%    |
| Sumter, SC                       | 1     | 0.1%    |
| Syracuse, NY                     | 1     | 0.1%    |
| Ukiah, CA                        | 1     | 0.1%    |
| Warner Robins, GA                | 1     | 0.1%    |
| Watertown, SD                    | 1     | 0.1%    |
| Wilmington, NC                   | 1     | 0.1%    |
| Winona, MN                       | 1     | 0.1%    |
| Wooster, OH                      | 1     | 0.1%    |
| York-Hanover, PA                 | 1     | 0.1%    |





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