



Bluffton Visitor Profile Survey

2023

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CHAMBER OF COMMERCE



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CHARLESTON

SCHOOL OF BUSINESS

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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Millennials and Gen Z represented a combined total of 63.1% of the respondents, followed by Gen X (19.1%), and then Boomers (17.4%). Over 55% of those surveyed had a bachelor's degree or higher, and more than 72% had an annual household income of \$75,000 or more per year. Also, just under 85% of the respondents were married.

POINT OF ORIGIN

The respondents resided in 140 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 (13.0%). Second was Texas (7.8%), followed then by Pennsylvania (7.1%), New York (6.5%), Ohio (5.5%), and Georgia (5.1%). In-state visitors did not make up a significantly large portion of the respondents (4.8%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: Los Angeles-Long Beach-Anaheim, CA; New York-Newark-Jersey City, NY-NJ; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; San Francisco-Oakland-Fremont, CA; Washington-Arlington-Alexandria, DC-VA-MD-WV; and Chicago-Naperville-Elgin, IL-IN.

Canada was the top international origin market amongst respondents (38.0%), followed by the Middle East (26.8%), and Europe (16.9%).

THOSE WHO TRAVELED TO BLUFFTON

The top reasons for choosing Bluffton as a destination included visiting beaches, spending time with family, business, shopping, visiting heritage attractions/museums/historic tours, and nature-based activities. Other popular motivations included boating/sailing/kayaking, biking, and relaxation. The activities in which visitors actually participated are similar to the previously mentioned activities, and also include culinary, music or theatrical performances, and festivals. Amongst Bluffton's overnight visitors, 74.9% were first-time visitors, suggesting that the destination continues to appeal to new visitors.

TRIP CHARACTERISTICS

The average group size of those surveyed was 3.5 for overnight visitors and 5.3 for day trip visitors. The main mode of transportation to town was non-stop commercial flights for overnight visitors (28.8%) and personal/family car for day trip visitors (47.1%). About 56% of overnight visitors flew to Bluffton via commercial flights, with just under one-third of them (32.8%) landing at the Hilton Head Island Airport.

The average length of stay for those overnight visitors surveyed was approximately 5.1 nights. Hotels were the most popular choice of accommodation for overnight visitors (35.8%), followed by resorts (22.8%), staying with friends/relatives (10.2%), and home/villa rentals (9.0%).

TRAVEL PLANNING

Vacasa was the most popular online booking platform for villas/homes (19.4%), followed by local vacation rental companies (16.7%), Airbnb (13.9%), HomeAway (13.9%), and Booking.com (11.1%). The top five other destinations visitors considered before choosing Bluffton were the Alabama Golf Trail; Gulf Shores, AL; the Hawaiian Islands; Outer Banks, NC; and the Caribbean.

Top reasons for choosing to visit Bluffton were wanting to visit nature-based attractions (36.7%), word-of-mouth recommendation (34.7%), wanting to visit a beach destination (32.7%), and wanting to visit heritage attractions (25.7%).

Of those surveyed, 62.9% 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=169), 33.7% had never visited the Hilton Head Island / Bluffton area before, and 50.3% had visited one to five times before.

Of those non-visitors, 47.0% traveled elsewhere, 26.0% plan to visit in the future, 4.0% were hesitant because of unpredictable weather events, 3.0% mentioned health reason, 2.0% did not find what they were looking for, and 2.0% did not travel at all. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (42.0%) and South (27.0%) were the most popular. Nonetheless, 48.8% 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 (50.6%) take two to four leisure/vacation trips per year, and they are most likely to travel between May and October.

The top five most appealing experiences for leisure trips/vacations were: relaxation & rejuvenation (72.2%), beaches (71.2%), passive outdoor adventures (63.7%), historic attractions (0.9%), and romantic couple getaways (60.8%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (76.9%), quality of dining options (74.6%), ease of access (73.3%), affordability (73.0%), quality of lodging options (72.6%), diversity of dining options (70.4%), and diversity of lodging options (65.9%).



METHODOLOGY

SURVEY IMPLEMENTATION

The 2023 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2023 and January 2024, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited www.hiltonheadisland.org or www.visitbluffton.org and submitted their email addresses, and they were 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 1,710 completed surveys were collected. This report is based largely on the 422 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 and 2022.

The table below shows the visitor estimates for Bluffton by segment for 2021, 2022, and 2023.

Visitor Segment	2021	2022	2023
Non-paying Guests	172,349	154,478	174,291
Daytrippers	309,137	277,083	312,621
Total Visitors	481,486	431,561	486,912

Table 1: Visitor Estimates 2022

SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

Gender	2022	2023
Female	38.1%	52.0%
Male	61.9%	47.5%
Self-identify		0.5%
Marital Status		
Married	69.1%	76.8%
Single	14.4%	12.4%
Divorced	7.7%	4.5%
Widowed	7.2%	4.8%
Separated	1.6%	1.5%
Education (highest level completed)		
Grade School	0.8%	0.5%
High School	3.6%	8.4%
Some College	26.7%	23.8%
Associates Degree (2 years)	15.8%	16.2%
Bachelor's Degree (4 years)	33.9%	32.5%
Graduate Degree (Post degree/MA)	19.1%	18.6%
Age		
19 years or younger	0.6%	0.3%
20 to 29 years	38.3%	23.8%
30 to 39 years	44.4%	36.8%
40 to 49 years	10.7%	12.2%
50 to 59 years	1.8%	10.9%
60 to 69 years	2.9%	9.8%
70 years and over	1.1%	6.0%
Prefer not to say	0.2%	0.3%
Household Income		
Under \$24,999	0.8%	1.4%
\$25,000-\$34,999	5.6%	5.4%
\$35,000-\$49,999	10.3%	11.0%
\$50,000-\$74,999	12.6%	14.7%
\$75,000-\$99,999	18.8%	20.1%
\$100,000-\$149,999	18.4%	18.1%
\$150,000-\$199,999	19.1%	14.7%
\$200,000-\$249,999	7.6%	10.8%
\$250,000 or more	6.8%	3.7%
N	1,005	422

Table 2: Demographics

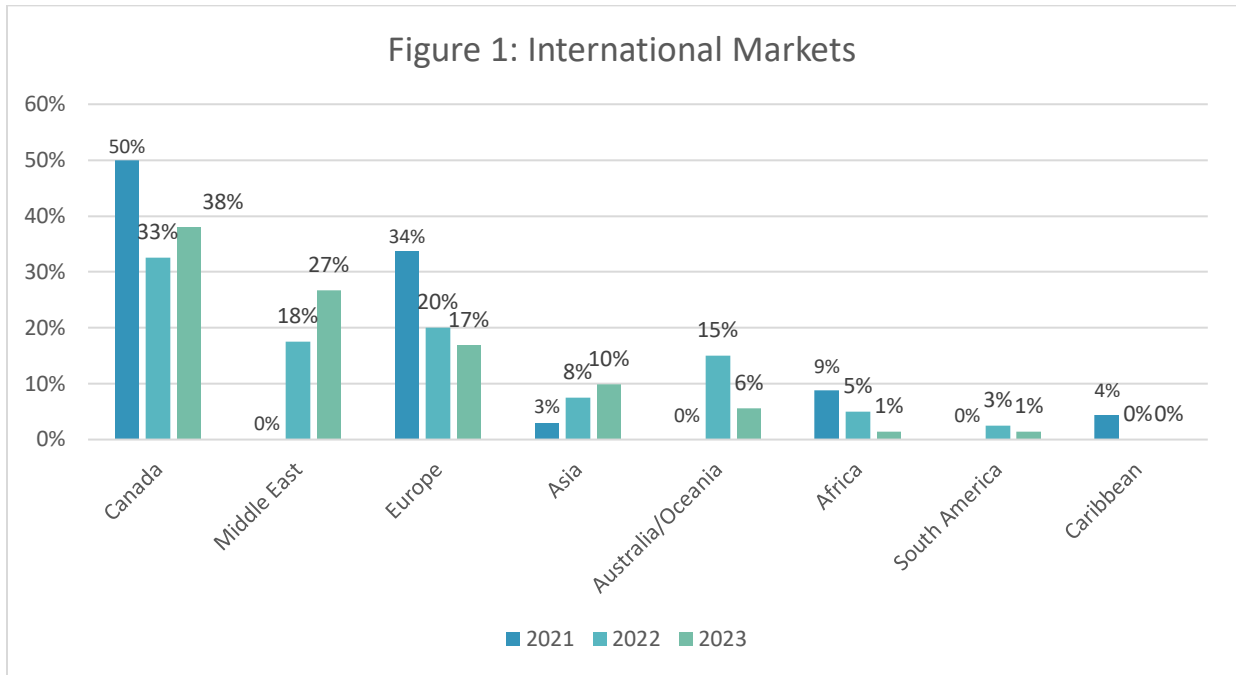
SAMPLE POINT OF ORIGIN

ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	Los Angeles-Long Beach-Anaheim, CA	106	9.3%
2	New York-Newark-Jersey City, NY-NJ	79	6.9%
3	Atlanta-Sandy Springs-Roswell, GA	44	3.9%
4	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
5	San Francisco-Oakland-Fremont, CA	39	3.4%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
7	Chicago-Naperville-Elgin, IL-IN	34	3.0%
8	Pittsburgh, PA	33	2.9%
9	Charlotte-Concord-Gastonia, NC-SC	23	2.0%
10	Columbus, OH	23	2.0%
11	Detroit-Warren-Dearborn, MI	20	1.8%
12	Charleston-North Charleston, SC	17	1.5%
13	Louisville/Jefferson County, KY-IN	17	1.5%
14	Rural OH	16	1.4%
15	Boston-Cambridge-Newton, MA-NH	15	1.3%
16	Cincinnati, OH-KY-IN	15	1.3%
17	Houston-Pasadena-The Woodlands, TX	15	1.3%
18	Kansas City, MO-KS	15	1.3%
19	Albany-Schenectady-Troy, NY	14	1.2%
20	Baltimore-Columbia-Towson, MD	14	1.2%
21	Austin-Round Rock-San Marcos, TX	13	1.1%
22	Riverside-San Bernardino-Ontario, CA	13	1.1%
23	San Diego-Chula Vista-Carlsbad, CA	13	1.1%
24	Jacksonville, FL	12	1.1%
25	Wisconsin Rapids-Marshfield, WI	12	1.1%
26	Greenville-Anderson-Greer, SC	11	1.0%
27	St. Louis, MO-IL	11	1.0%
28	Akron, OH	10	0.9%
29	Columbia, SC	10	0.9%
30	Rural TX	10	0.9%
	Other	408	35.8%
	Total	1,141	

Table 3: ZIP Code Analysis – Top 30 MSAs

International Markets

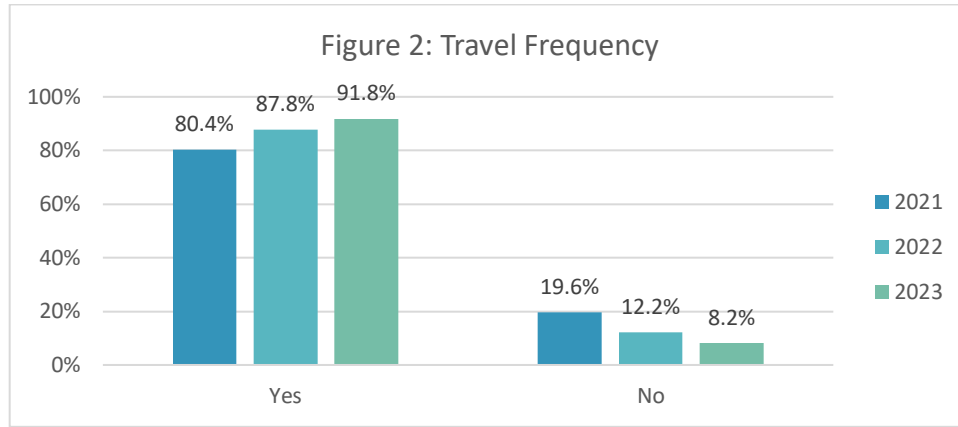


	2021	2022	2023
Canada	50.0%	32.5%	38.0%
Middle East	-	17.5%	26.8%
Europe	33.8%	20.0%	16.9%
Asia	3.0%	7.5%	9.9%
Australia/Oceania	-	15.0%	5.6%
Africa	8.8%	5.0%	1.4%
South America	-	2.5%	1.4%
Caribbean	4.4%	-	-
N	68	40	71

Table 4: International Markets

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

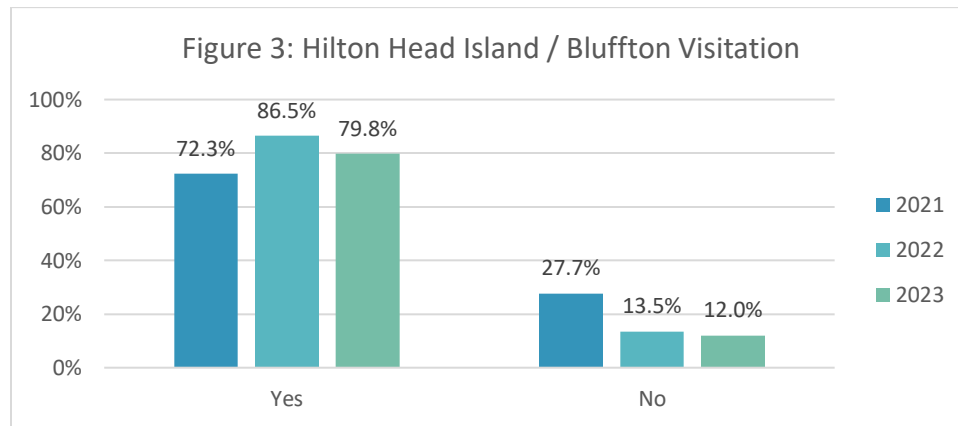
Within the last 12 months have you traveled or taken a vacation?



	2021	2022	2023
Yes	80.4%	87.8%	91.8%
No	19.6%	12.2%	8.2%
N	2,084	2,918	1,710

TABLE 5: Travel Frequency by Year

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

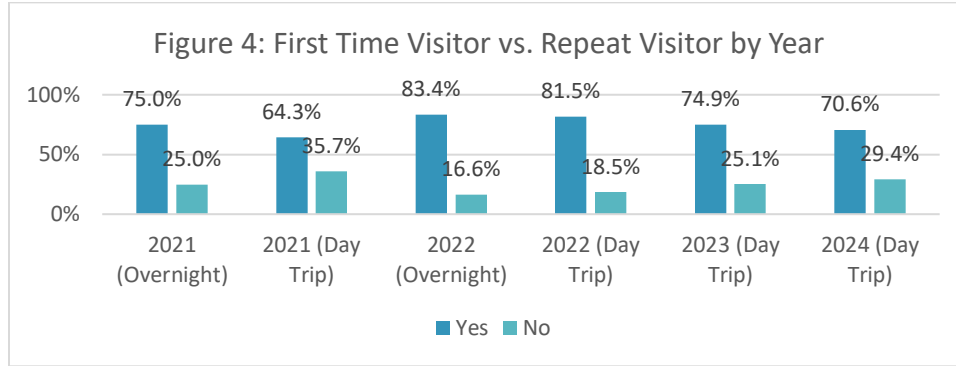


	2021	2022	2023
Yes	72.3%	86.5%	79.8%
No	27.7%	13.5%	12.0%
N	1,675	2,547	1,570

TABLE 6: Bluffton / Hilton Head Island Visitation by Year

BLUFFTON VISITORS

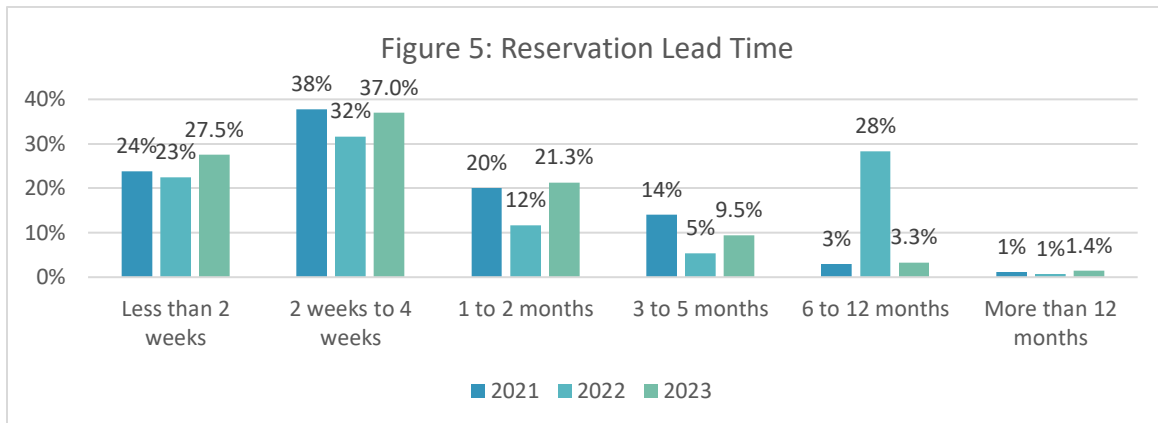
Was that your first time visiting in Bluffton?



	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Yes	75.0%	64.3%	83.4%	81.5%	74.9%	70.6%
No	25.0%	35.7%	16.6%	18.5%	25.1%	29.4%
N	164	28	603	54	211	34

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	2023
Less than 2 weeks	23.8%	22.5%	27.5%
2 weeks to 4 weeks	37.8%	31.6%	37.0%
1 to 2 months	20.1%	11.6%	21.3%
3 to 5 months	14.0%	5.3%	9.5%
6 to 12 months	3.0%	28.3%	3.3%
More than 12 months	1.2%	0.7%	1.4%
N	164	604	211

TABLE 8: Reservation Lead Time

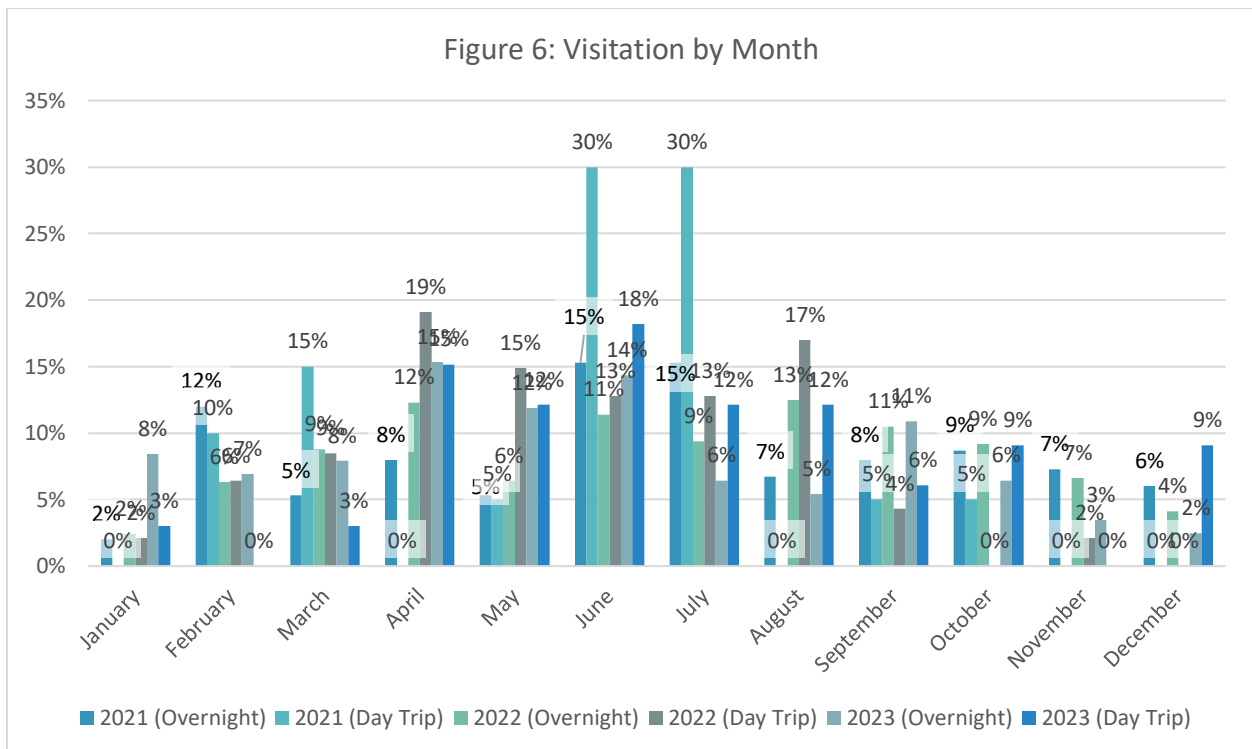
When did you make your most recent trip to Bluffton?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2024 (Day Trip)
2020	29.3%	15.8%				
2021	70.7%	84.2%				
2022			100.0%	100.0%		
2023					100.0%	100.0%
N	150	19	543	47	202	33

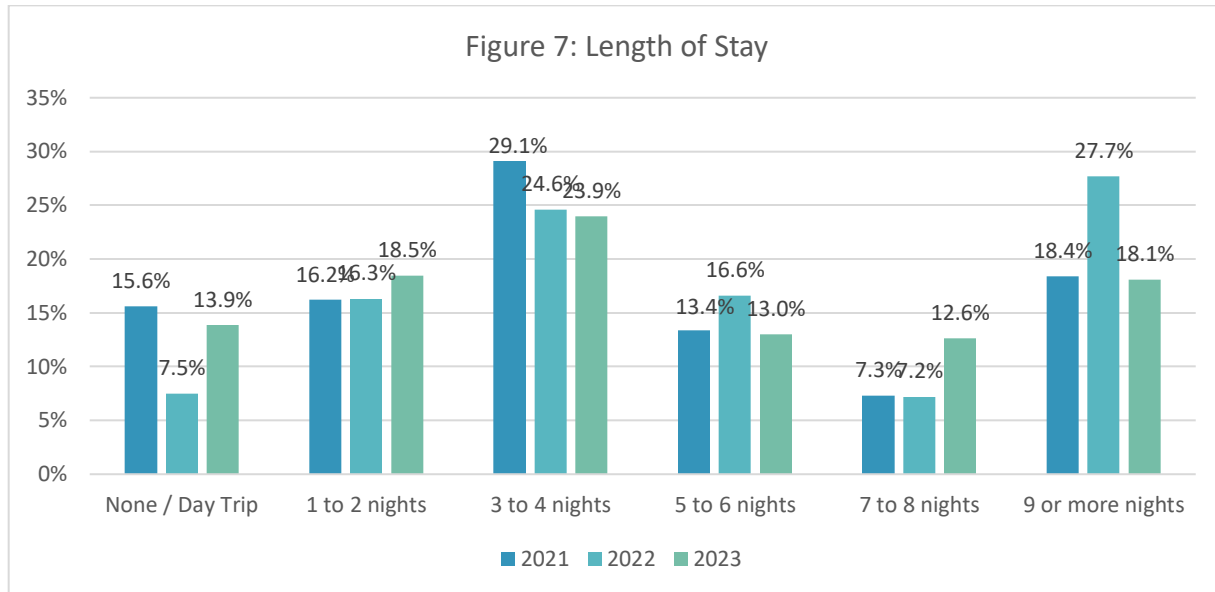
TABLE 9: Visitation Year

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2024 (Day Trip)
January	2.0%	-	2.4%	2.1%	8.4%	3.0%
February	12.0%	10.0%	6.3%	6.4%	6.9%	0.0%
March	5.3%	15.0%	8.8%	8.5%	7.9%	3.0%
April	8.0%	-	12.3%	19.1%	15.3%	15.2%
May	5.3%	5.0%	6.4%	14.9%	11.9%	12.1%
June	15.3%	30.0%	11.4%	12.8%	14.4%	18.2%
July	15.3%	30.0%	9.4%	12.8%	6.4%	12.1%
August	6.7%	-	12.5%	17.0%	5.4%	12.1%
September	8.0%	5.0%	10.5%	4.3%	10.9%	6.1%
October	8.7%	5.0%	9.2%	-	6.4%	9.1%
November	7.3%	-	6.6%	2.1%	3.5%	0.0%
December	6.0%	-	4.1%	-	2.5%	9.1%
N	150	20	543	47	202	33

TABLE 10: Visitation by Month



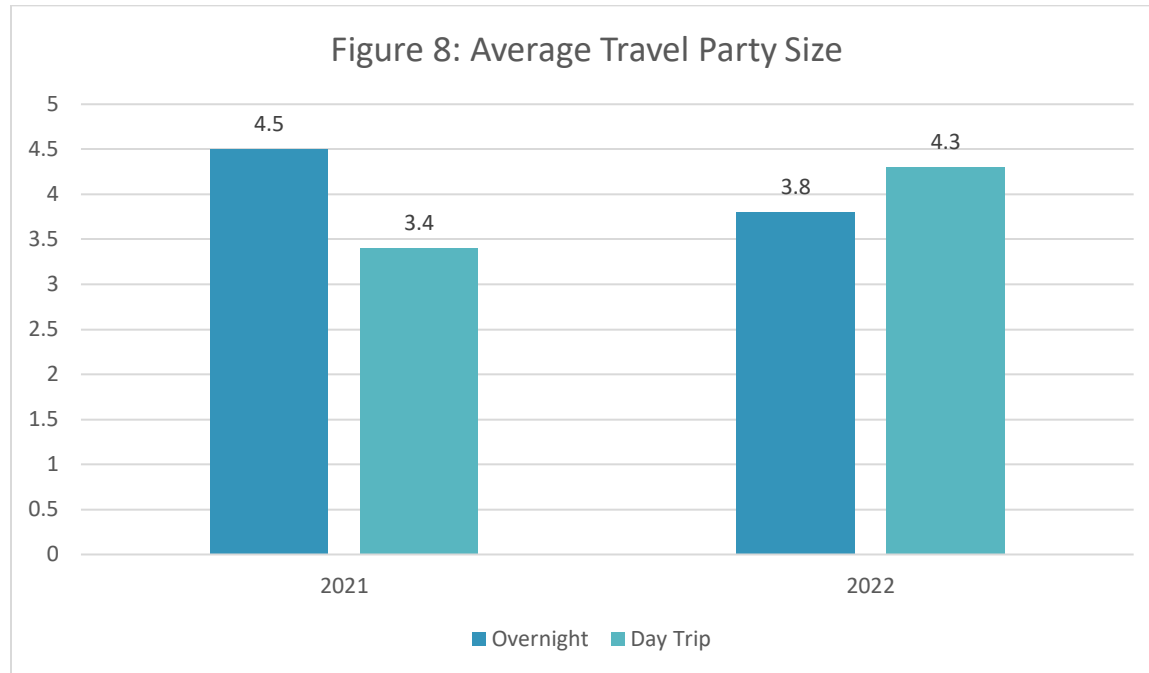
Approximately how many nights was your trip to Bluffton?



	2021	2022	2023
None/day trip only	15.6%	7.5%	13.9%
1 night	3.4%	3.4%	3.4%
2 nights	12.8%	12.9%	15.1%
3 nights	18.4%	14.2%	15.5%
4 nights	10.6%	10.4%	8.4%
5 nights	13.4%	9.9%	10.1%
6 nights	-	6.7%	2.9%
7 nights	4.5%	4.6%	6.3%
8 nights	2.8%	2.6%	6.3%
9 nights	2.2%	2.1%	1.3%
10 nights	5.6%	4.2%	4.2%
11 nights	1.7%	2.2%	-
12 nights	1.7%	1.6%	2.5%
13 nights	1.7%	1.1%	1.3%
14 nights	1.7%	3.8%	1.7%
15 nights	1.1%	2.2%	1.7%
More than 15 nights	2.8%	10.5%	5.5%
N	179	626	238

TABLE 11: Length of Stay

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



	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Average	4.5	3.4	3.8	4.3	3.5	5.3
N	151	21	543	47	205	33

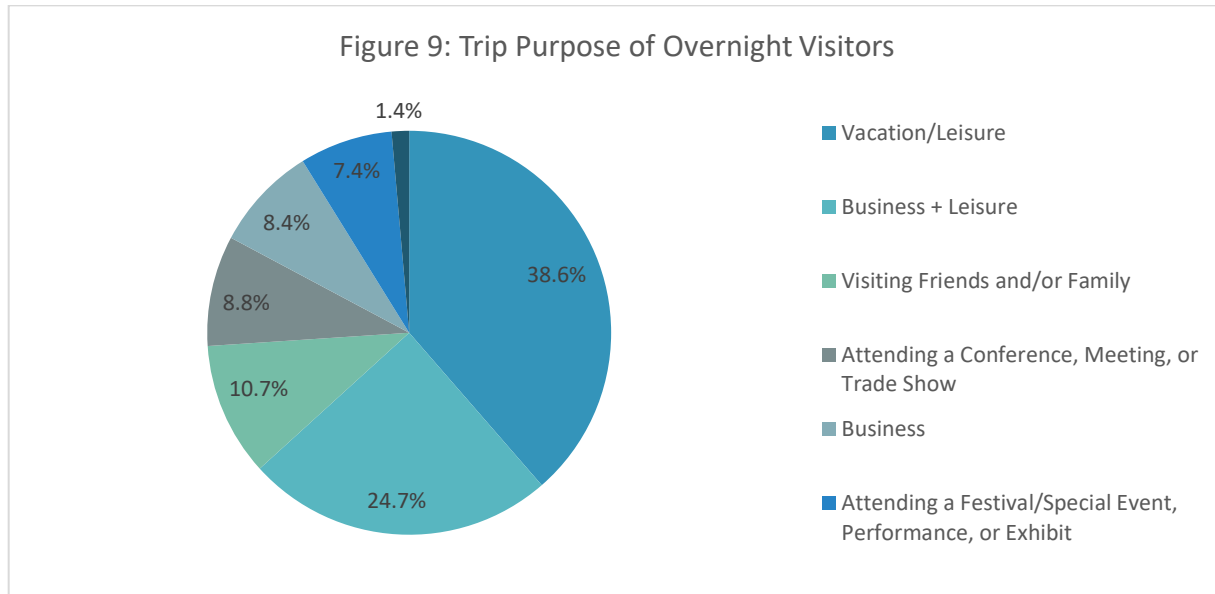
TABLE 12: Travel Party Size

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

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	68.4%	20.0%	6.0%	1.4%	-	0.9%	3.3%
	18-24	67.4%	14.4%	6.5%	1.9%	0.9%	0.9%	6.5%
	25-34	56.3%	16.3%	13.5%	3.7%	0.5%	1.4%	6.0%
	35-44	64.7%	15.3%	9.8%	1.9%	1.4%	0.9%	6.0%
	45-54	83.3%	10.7%	2.8%	-	-	-	3.3%
	55-64	86.0%	10.2%	1.4%	-	-	-	2.3%
	65+	89.8%	7.4%	1.4%	-	-	-	1.4%
Day Trip	Under 18	64.7%	14.7%	14.7%	-	-	2.9%	2.9%
	18-24	67.6%	14.7%	5.9%	-	-	5.9%	5.9%
	25-34	44.1%	14.7%	8.8%	5.9%	5.9%	5.9%	14.7%
	35-44	64.7%	14.7%	8.8%	-	2.9%	2.9%	5.9%
	45-54	79.4%	11.8%	5.9%	2.9%	-	-	-
	55-64	79.4%	5.9%	2.9%	2.9%	-	2.9%	5.9%
	65+	82.4%	11.8%	5.9%	-	-	-	-

TABLE 13: Travel Party Age Mix

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



	2021	2022	2023
Vacation/Leisure	46.3%	42.1%	38.6%
Business + Leisure	22.1%	20.4%	24.7%
Visiting Friends and/or Family	16.8%	9.7%	10.7%
Attending a Conference, Meeting, or Trade Show	9.4%	10.2%	8.8%
Business	-	10.2%	8.4%
Attending a Festival/Special Event, Performance, or Exhibit	3.4%	6.6%	7.4%
Relocating to Hilton Head/Bluffton area	2.0%	0.8%	1.4%
N	149	608	215

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	2023
Part of a vacation	50.0%	85.2%	76.5%
Day trip from home	50.0%	14.8%	23.5%
N	28	54	34

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

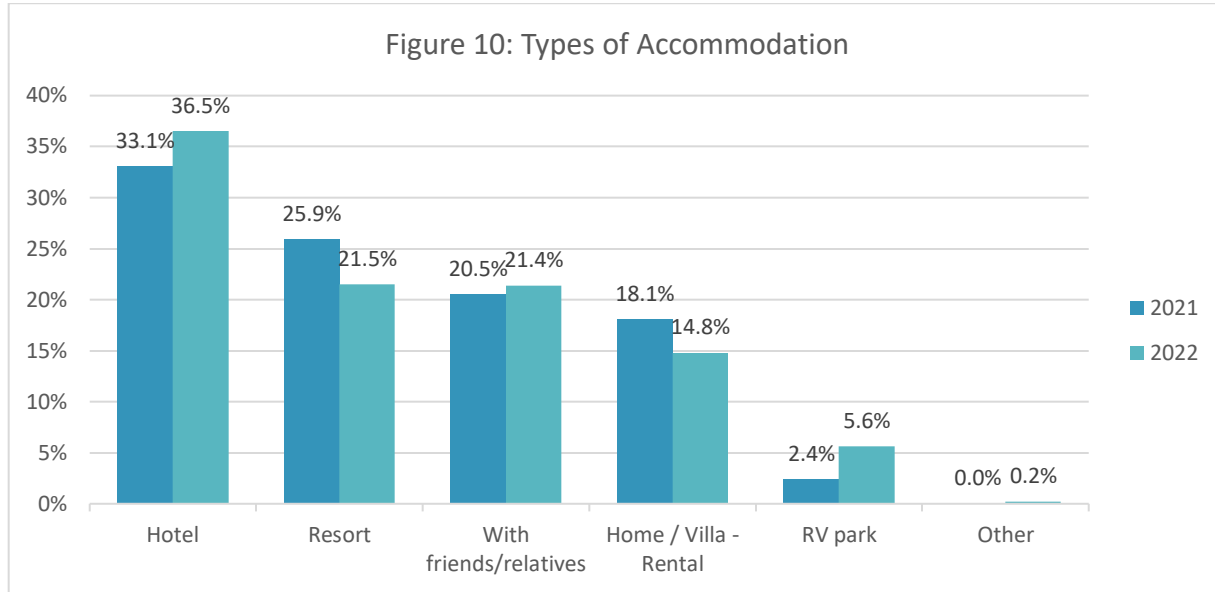
Where did you stay overnight?

	2021	2022	2023
Charleston	18.2%	39.1%	26.9%
Savannah	45.5%	8.7%	23.1%
Tybee Island	-	28.3%	19.2%
Beaufort	18.2%	17.4%	15.4%
Jacksonville	9.1%	2.2%	11.5%
Other	9.1%	4.3%	3.8%
N	11	46	26

TABLE 16: Vacation Day Trip Visitors Overnight Location

Overnight Visitors:

What was your primary form of accommodation while visiting Bluffton?



	2021	2022	2023
Hotel	33.1%	36.5%	35.8%
Resort	25.9%	21.5%	22.8%
With friends/relatives	20.5%	21.4%	10.2%
Home / Villa - Rental	18.1%	14.8%	9.0%
RV park	2.4%	5.6%	1.7%
Other	-	0.2%	0.2%
N	166	608	215

TABLE 17: Types of Accommodation

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

Montage Palmetto Bluff	22.1%
Old Town Bluffton Inn	16.2%
Comfort Suites	13.2%
Hilton Beachfront Resort & Spa	8.8%
Comfort Inn Hilton Head Island	7.4%
Holiday Inn	4.4%
Holiday Inn Express	4.4%
Hampton Inn & Suites Bluffton-Sun City	2.9%
Hilton Garden Inn Hilton Head	2.9%
Sea Pines Resort	2.9%
N	68

TABLE 18: Top 10 Hotels or Resorts

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

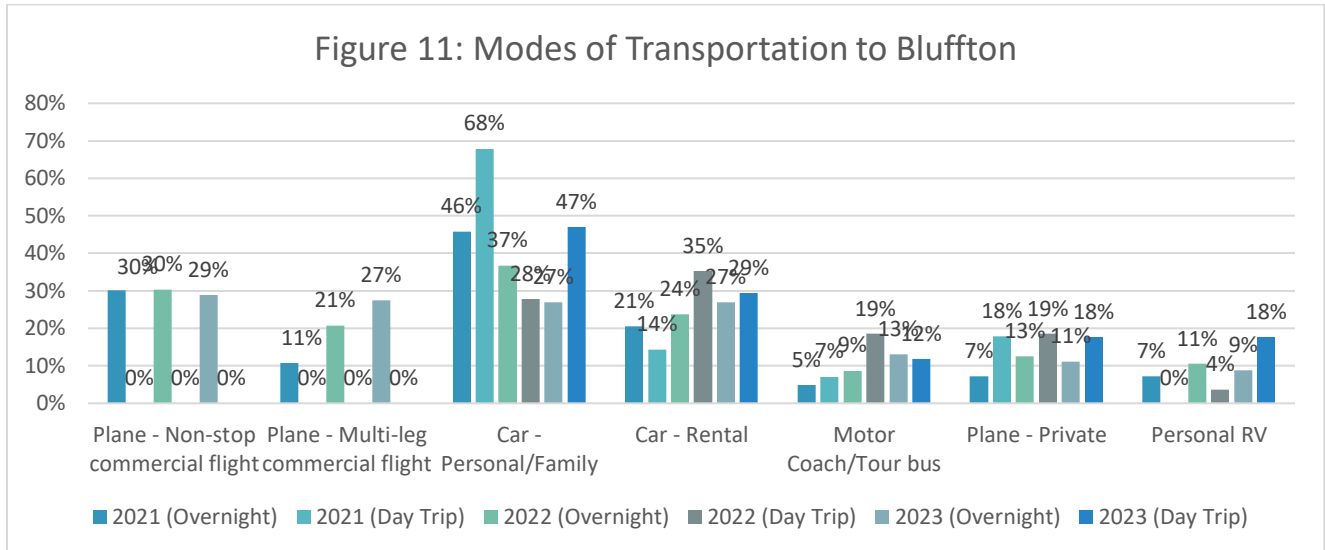
Vacasa	19.4%
A local vacation rental company	16.7%
Airbnb	13.9%
HomeAway	13.9%
Booking.com	11.1%
Directly with the resort	11.1%
TurnKey	5.6%
VRBO	5.6%
I don't remember	2.8%
N	36

TABLE 19: Booking Platforms for Home/Villa Rental

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

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Plane - Non-stop commercial flight	30.1%	-	30.3%	-	28.8%	-
Plane - Multi-leg commercial flight	10.8%	-	20.7%	-	27.4%	-
Car - Personal/Family	45.8%	67.9%	36.7%	27.8%	27.0%	47.1%
Car - Rental	20.5%	14.3%	23.8%	35.2%	27.0%	29.4%
Motor Coach/Tour bus	4.8%	7.1%	8.7%	18.5%	13.0%	11.8%
Plane - Private	7.2%	17.9%	12.5%	18.5%	11.2%	17.6%
Personal RV	7.2%	-	10.5%	3.7%	8.8%	17.6%
N	166	28	608	54	215	34

TABLE 20: Modes of Transportation to Bluffton



Visitors Arriving by Plane:

At which airport did you land?

Hilton Head Island	32.8%
Charleston	20.9%
Jacksonville	15.7%
Savannah/Hilton Head Island International	15.7%
Atlanta	11.9%
Charlotte	3.0%
N	134

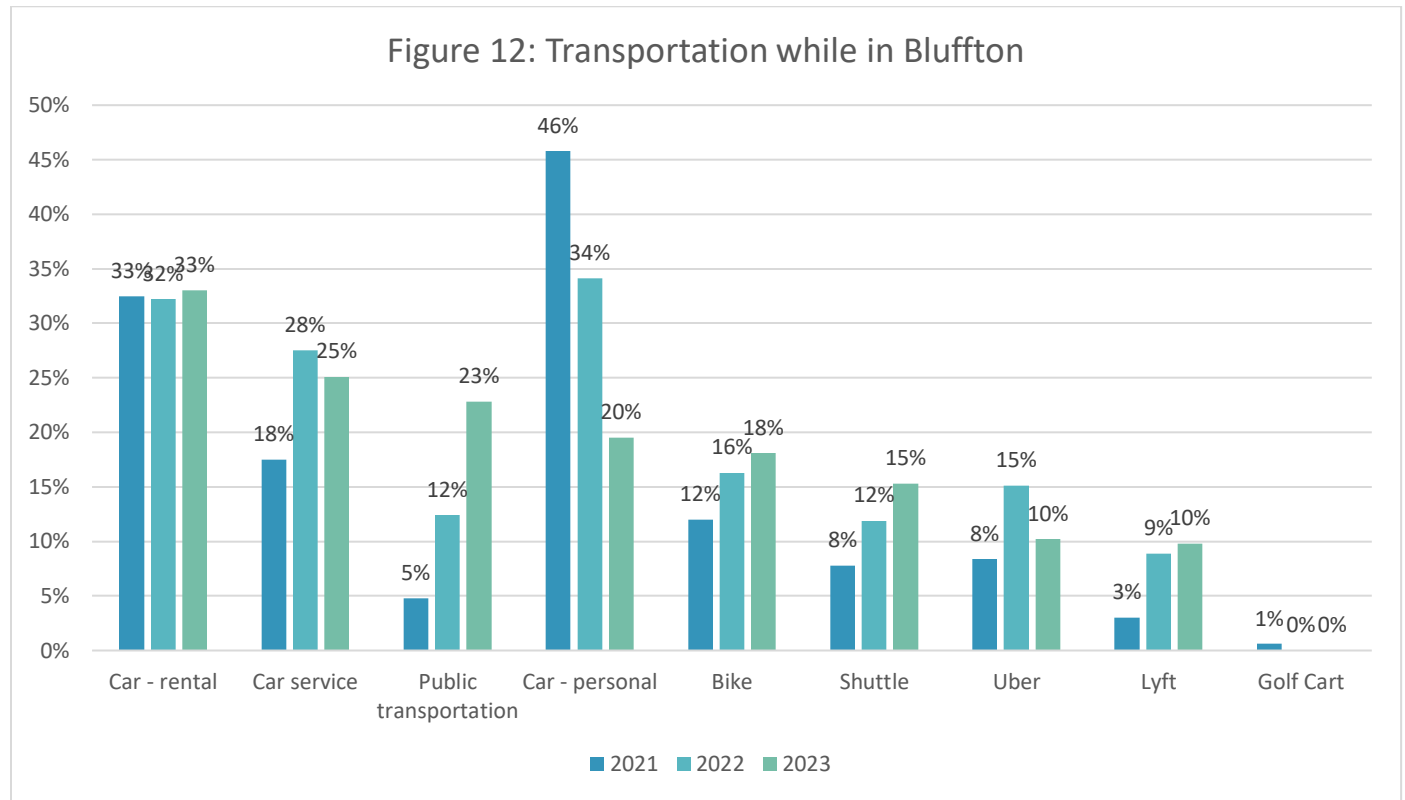
TABLE 21: Arrival Airport

Which commercial airline did you use?

American Airlines	48.3%
Alaska	13.6%
Allegiant	5.9%
JetBlue	5.9%
Delta	5.1%
Breeze	4.2%
Frontier	4.2%
Silver Airways	3.4%
Southwest	3.4%
Sun Country Airlines	3.4%
Air Canada	2.5%
N	118

TABLE 22: Commercial Airlines Used

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



	2021	2022	2023
Car - rental	32.5%	32.2%	33.0%
Car service	17.5%	27.5%	25.1%
Public transportation (HHI Trolley, etc.)	4.8%	12.4%	22.8%
Car - personal	45.8%	34.1%	19.5%
Bike	12.0%	16.3%	18.1%
Shuttle offered by the hotel/resort	7.8%	11.9%	15.3%
Uber	8.4%	15.1%	10.2%
Lyft	3.0%	8.9%	9.8%
Golf Cart	0.6%	-	-
N	166	608	215

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	\$152.08	\$57.42	\$136.41
Lodging	\$519.46	\$0.00	\$519.46
Food - Dining	\$263.35	\$165.68	\$247.99
Food - Grocery	\$126.94	\$107.32	\$123.85
Shopping	\$360.28	\$156.89	\$327.74
Spas	\$47.72	\$73.10	\$51.99
Golf	\$29.13	\$29.43	\$29.18
Biking	\$10.38	\$20.00	\$11.95
Performance/Visual Arts	\$72.09	\$71.03	\$71.92
Festivals	\$46.38	\$44.83	\$46.13
Museums/Historical Tours	\$63.69	\$74.27	\$65.41
Boating/Sailing/Fishing	\$91.32	\$90.57	\$91.19
Nature-based Activities	\$43.64	\$41.37	\$43.27
Dolphin Tours	\$50.99	\$57.69	\$52.07
Tennis	\$18.32	\$55.27	\$24.31
Other Expenses	\$58.83	\$12.50	\$51.54
Total Expenditure	\$1,888.56	\$1,413.83	\$1,813.61

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

What are the three primary reasons why you visited Bluffton?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Beaches	33.1%	53.6%	30.3%	27.8%	29.8%	44.1%
Time with family/friends	22.3%	21.4%	23.5%	5.6%	27.4%	26.5%
Business trip (convention, meeting, etc.)	15.1%	10.7%	22.7%	37.0%	26.5%	2.9%
Shopping	14.5%	28.6%	16.4%	11.1%	19.5%	20.6%
Heritage attractions / Museum / Historical tours	22.3%	25.0%	17.6%	13.0%	17.7%	32.4%
Nature-based activities	16.9%	3.6%	16.1%	3.7%	15.8%	23.5%
Boating / Sailing / Kayaking	21.1%	7.1%	22.7%	20.4%	14.4%	0.0%
Biking	15.7%	14.3%	23.2%	37.0%	13.5%	11.8%
Relaxation	21.7%	-	11.0%	9.3%	12.1%	20.6%
Attend sporting event	10.2%	25.0%	12.2%	11.1%	11.2%	2.9%
Culinary	12.0%	32.1%	10.2%	37.0%	8.8%	20.6%
Health/wellness/fitness	10.2%	7.1%	11.7%	5.6%	8.4%	8.8%
Festivals	7.8%	3.6%	12.8%	1.9%	7.9%	8.8%
Parks	5.4%	7.1%	8.6%	7.4%	7.0%	2.9%
Golf	11.4%	3.6%	7.9%	13.0%	6.5%	2.9%
Tennis	2.4%	3.6%	4.9%	1.9%	4.2%	26.5%
Wedding	2.4%	-	3.5%	-	3.3%	2.9%
Performance/visual arts	-	3.6%	-	-	1.4%	8.8%
N	166	28	608	54	215	34

TABLE 25: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Beaches	40.4%	42.9%	40.6%	37.0%	31.2%	44.1%
Biking	16.9%	7.1%	33.9%	27.8%	27.0%	17.6%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	24.1%	-	20.4%	9.3%	24.7%	23.5%
Business/work	17.5%	14.3%	24.8%	9.3%	22.8%	2.9%
Shopping	22.3%	50.0%	22.0%	18.5%	21.4%	29.4%
Museum / Historical tours	19.3%	10.7%	21.5%	5.6%	20.9%	14.7%
Culinary	17.5%	42.9%	21.2%	20.4%	20.5%	20.6%
Music or theatrical performance / Visual arts exhibit	10.2%	7.1%	15.6%	3.7%	19.5%	8.8%
Time with family/friends	24.1%	35.7%	20.4%	14.8%	18.6%	20.6%
Relaxation	25.9%	35.7%	15.3%	13.0%	14.9%	8.8%
Festivals	12.7%	7.1%	19.1%	11.1%	14.4%	17.6%
Health / Wellness / Fitness	16.3%	3.6%	19.6%	18.5%	14.4%	14.7%
Attend sporting event	13.3%	14.3%	17.1%	16.7%	14.0%	11.8%
Spas	5.4%	3.6%	13.2%	3.7%	10.2%	5.9%
Golf	12.7%	7.1%	16.1%	7.4%	9.3%	5.9%
Sports activities	5.4%	-	9.2%	3.7%	9.3%	58.8%
Water excursions	11.4%	10.7%	9.5%	22.2%	7.9%	17.6%
Tennis	5.4%	-	6.9%	1.9%	6.0%	2.9%
University visit / Education / Intellectual programs	4.2%	10.7%	8.2%	5.6%	5.1%	2.9%
Other	1.8%	-	-	-	1.4%	5.9%
N	166	28	608	54	215	34

TABLE 26: Activities Visitors Participated In

Which shopping locations did you visit?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)
Downtown Bluffton	48.2%	39.3%	48.8%	50.0%	50.2%	38.2%
Main Street Village	19.3%	17.9%	27.1%	18.5%	24.7%	20.6%
Coligny Plaza	29.5%	25.0%	25.8%	37.0%	24.2%	23.5%
Harbour Town	26.5%	17.9%	25.8%	33.3%	27.9%	23.5%
Tanger Outlets	31.3%	53.6%	21.5%	9.3%	15.3%	5.9%
Shelter Cove Harbour	21.7%	10.7%	20.9%	29.6%	16.7%	20.6%
Shelter Cove Towne Centre	18.1%	17.9%	20.2%	22.2%	25.1%	29.4%
Buckwalter shopping areas	15.7%	14.3%	19.9%	11.1%	22.3%	8.8%
South Beach Marina	10.2%	3.6%	18.3%	9.3%	17.2%	23.5%
The Shops at Sea Pines Center	20.5%	7.1%	17.9%	16.7%	14.9%	35.3%
Village at Wexford	12.7%	-	14.8%	11.1%	9.8%	11.8%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	17.5%	28.6%	11.2%	18.5%	22.3%	20.6%
Other	1.2%	-			-	-
None	1.2%	3.6%			0.9%	5.9%
N	166	28	608	54	215	34

TABLE 27: Shopping Locations Visited

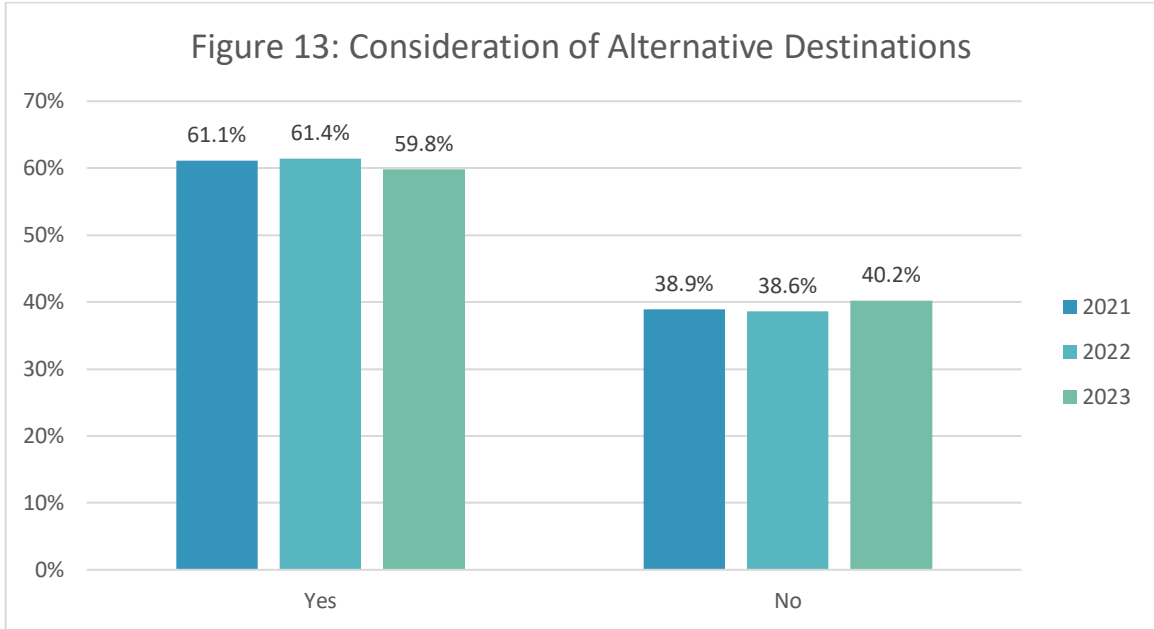
Did you visit any of the following cities while staying in Bluffton?

	2021	2022	2023
Hilton Head Island	50.6%	37.7%	43.7%
Charleston	26.5%	33.7%	32.6%
Jacksonville	21.7%	27.3%	24.2%
Daufuskie Island	15.1%	28.5%	20.9%
Beaufort	25.9%	27.5%	20.0%
Savannah	27.7%	25.2%	19.5%
Tybee Island	14.5%	15.3%	14.0%
Port Royal	0.6%	0.3%	-
I did not visit any other cities.	4.2%	4.1%	5.1%
N	166	608	215

TABLE 28: Other Cities Visited While Staying in Bluffton

TRAVEL PLANNING

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



	2021	2022	2023
Yes	61.1%	61.4%	59.8%
No	38.9%	38.6%	40.2%
N	193	658	249

TABLE 29: Consideration of alternative destinations

Which of the following destinations did you consider visiting?

	2021	2022	2023
Alabama Golf Trail	36.4%	38.1%	36.9%
Gulf Shores, AL	22.0%	29.5%	34.9%
Hawaiian Islands	22.0%	37.4%	32.9%
Outer Banks, NC	9.3%	20.3%	30.9%
Caribbean	22.0%	26.5%	28.2%
Marco Island/Naples	15.3%	24.3%	26.8%
Isle of Palms, SC	22.0%	26.2%	24.2%
Sanibel Island, FL	9.3%	11.9%	20.8%
Aspen, CO	36.4%	22.3%	20.1%
Reynolds Plantation, GA	9.3%	21.3%	20.1%
Telluride, CO	7.6%	23.5%	19.5%
Sea Island, GA	9.3%	21.0%	19.5%
Kiawah Island, SC	22.0%	17.1%	18.1%
Charleston, SC	22.0%	10.6%	17.4%
Orlando, FL	15.3%	28.7%	16.8%
Pinehurst, NC	9.3%	16.3%	16.1%
St. Simons Island, GA	9.3%	10.6%	16.1%
Sandestin, FL	9.3%	18.3%	15.4%
Savannah, GA	9.3%	23.8%	14.1%
Napa/Sonoma, CA	15.3%	11.4%	14.1%
Ponte Vedre, FL	9.3%	17.3%	13.4%
Hilton Head, SC	22.0%	13.9%	10.7%
Sarasota, FL	9.3%	12.1%	10.7%
Tampa/St. Petersburg, FL	7.6%	10.1%	9.4%
Jekyll Island, GA	22.0%	8.4%	8.7%
Santa Fe, NM	9.3%	7.4%	8.7%
Tybee Island, GA	7.6%	8.7%	6.0%
Myrtle Beach, SC	15.3%	6.9%	6.0%
The Florida Keys	7.6%	5.7%	6.0%
Other	15.3%	17.3%	12.1%
Total	118	404	149

TABLE 30: Alternative Destinations by Year

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

	2021	2022	2023
Wanted to visit because of the nature-based attractions	23.3%	41.9%	36.7%
It was recommended by friends/family	29.0%	35.5%	34.7%
Wanted to visit a beach destination	32.6%	34.9%	32.7%
Wanted to visit heritage attractions	19.2%	35.7%	25.7%
Had visited in the past and wanted to return	28.0%	22.7%	22.0%
Wanted to visit someplace new	16.6%	24.0%	21.6%
Saw an advertisement in a magazine/website/social media	17.1%	18.8%	21.2%
Wanted to visit some place within driving distance	19.7%	18.4%	18.8%
Discovered/learned about it on the internet/display ads/search engines	20.2%	19.7%	13.9%
Wanted to attend a cultural/performing arts event	9.3%	15.8%	13.1%
Safe place to visit during or after COVID-19	9.8%	11.7%	10.2%
Wanted to attend a sporting event	5.7%	13.7%	7.3%
Other	4.7%	1.3%	2.4%
Total	193	618	249

TABLE 31: Reasons for Visiting Hilton Head Island

How likely are you to return to Bluffton?

	2021	2022	2023
Very likely	59.4%	34.8%	30.8%
Likely	26.4%	33.0%	32.1%
Neutral	12.3%	24.3%	23.7%
Unlikely	0.9%	6.1%	10.7%
Very Unlikely	0.9%	1.8%	2.7%
Total	106	618	224

TABLE 32: Likelihood of Visiting Bluffton Again

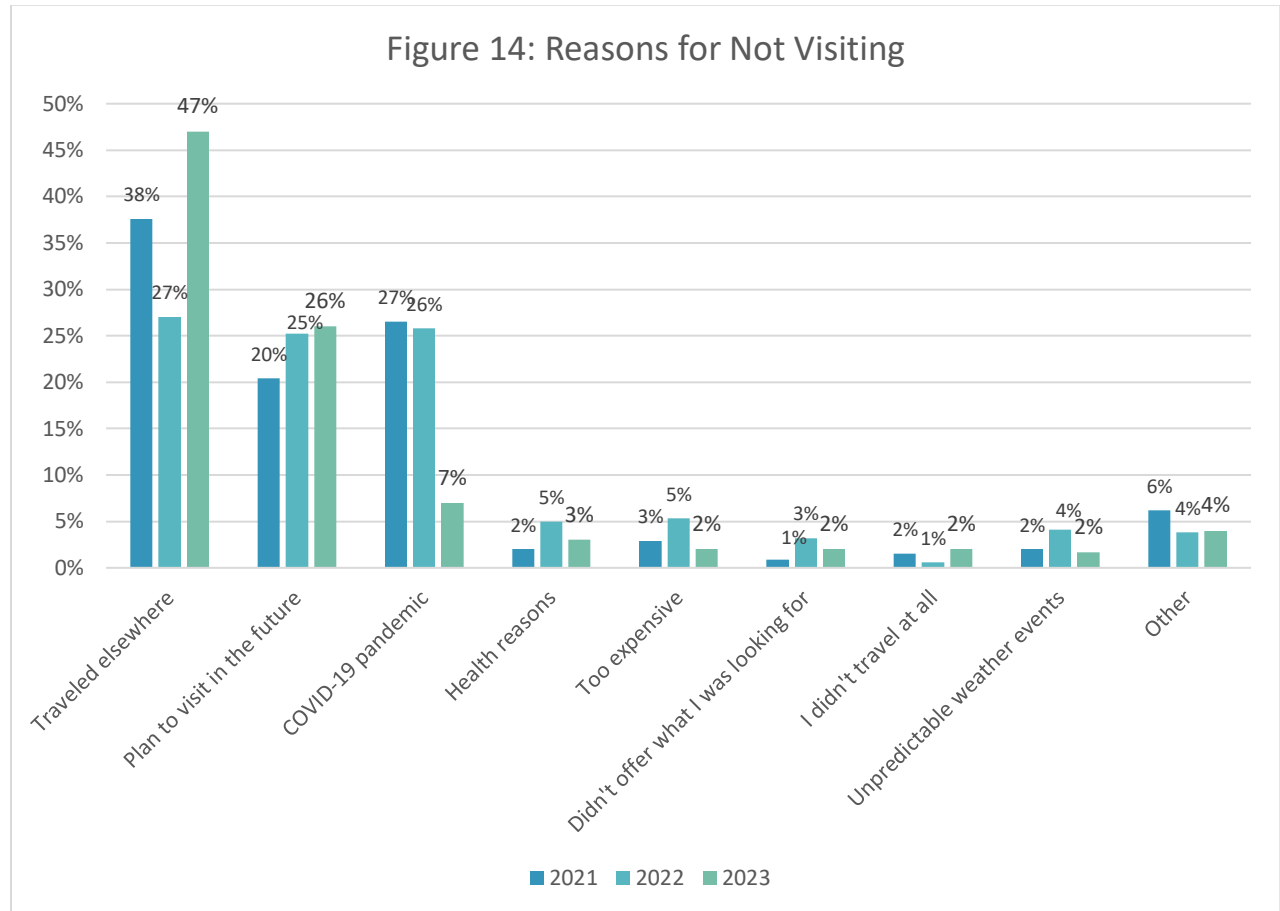
How likely are you to recommend visiting Bluffton to a friend or family member?

	2021	2022	2023
Definitely Recommend	70.8%	39.4%	34.5%
Probably Recommend	20.8%	40.0%	34.1%
May or May Not Recommend	7.5%	17.2%	21.8%
Probably Not Recommend	0.9%	3.1%	9.2%
Definitely Not Recommend	0.0%	0.3%	0.4%
Total	106	635	229

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	2023
Traveled elsewhere	37.6%	27.0%	47.0%
Plan to visit in the future	20.4%	25.2%	26.0%
COVID-19 pandemic	26.5%	25.8%	7.0%
Health reasons	2.0%	5.0%	3.0%
Too expensive	2.9%	5.3%	2.0%
Didn't offer what I was looking for	0.9%	3.2%	2.0%
I didn't travel at all	1.5%	0.6%	2.0%
Unpredictable weather events	2.0%	4.1%	1.7%
Other	6.2%	3.8%	4.0%
Total	860	341	100

TABLE 34: Reasons for not visiting

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

	2021	2022	2023
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%
Canada	1.4%	10.9%	16.0%
Europe	1.2%	7.3%	10.0%
Asia	0.5%	4.4%	8.0%
Latin America and Caribbean	2.1%	6.5%	6.0%
Australia/New Zealand	0.2%	3.2%	6.0%
Africa	0.3%	1.2%	1.0%
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
Total	860	341	100

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	2023
Never visited	38.9%	42.9%	33.7%
1	18.6%	14.0%	9.5%
2 to 5	30.2%	36.4%	40.8%
6 to 10	9.8%	5.0%	13.6%
11 to 20	1.9%	0.9%	1.2%
21 or more	0.9%	0.5%	1.2%
Total	860	341	169

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	2023
Yes, within one year	49.2%	50.1%	48.8%
Yes, but not sure when	42.5%	49.0%	47.0%
No	8.3%	0.9%	4.2%
Total	859	341	168

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

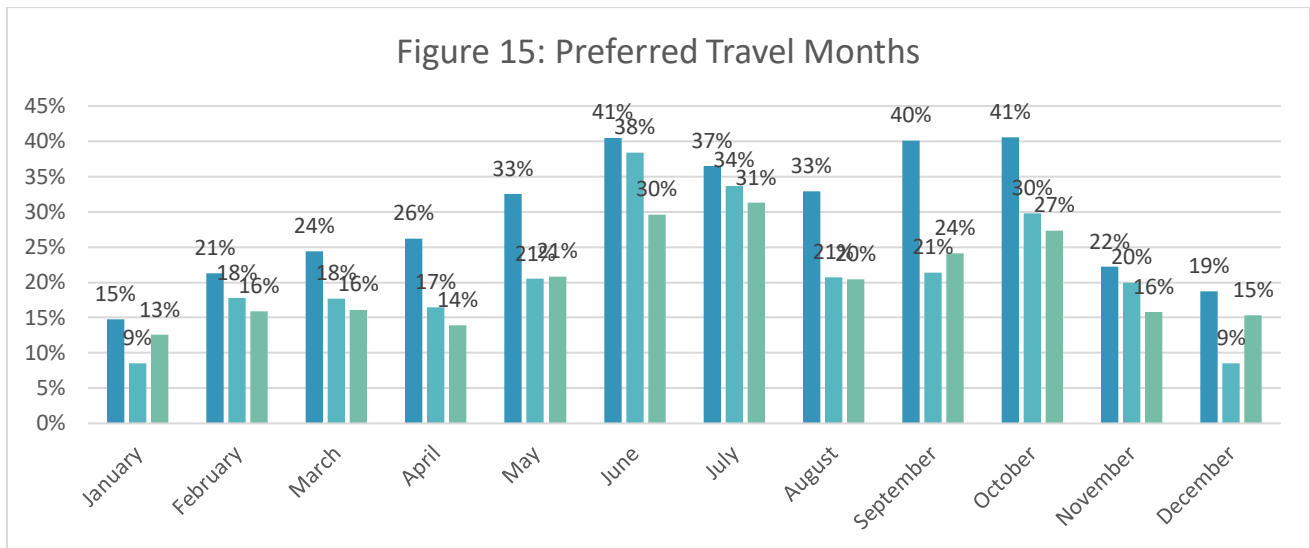
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2021	2022	2023
0 to 1	15.3%	10.0%	7.3%
2 to 4	55.1%	47.3%	50.6%
5 to 7	19.2%	29.9%	23.4%
8 to 10	6.3%	8.2%	15.8%
More than 10	4.1%	4.7%	2.9%
Total	1,042	984	1,625

TABLE 38: Frequency of Leisure/Vacation Trips

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



	2021	2022	2023
January	14.8%	8.5%	12.6%
February	21.3%	17.8%	15.9%
March	24.4%	17.7%	16.1%
April	26.2%	16.5%	13.9%
May	32.5%	20.5%	20.8%
June	40.5%	38.4%	29.6%
July	36.5%	33.7%	31.3%
August	32.9%	20.7%	20.4%
September	40.1%	21.4%	24.1%
October	40.6%	29.8%	27.3%
November	22.2%	20.0%	15.8%
December	18.7%	8.5%	15.3%
Total	1,042	984	1,625

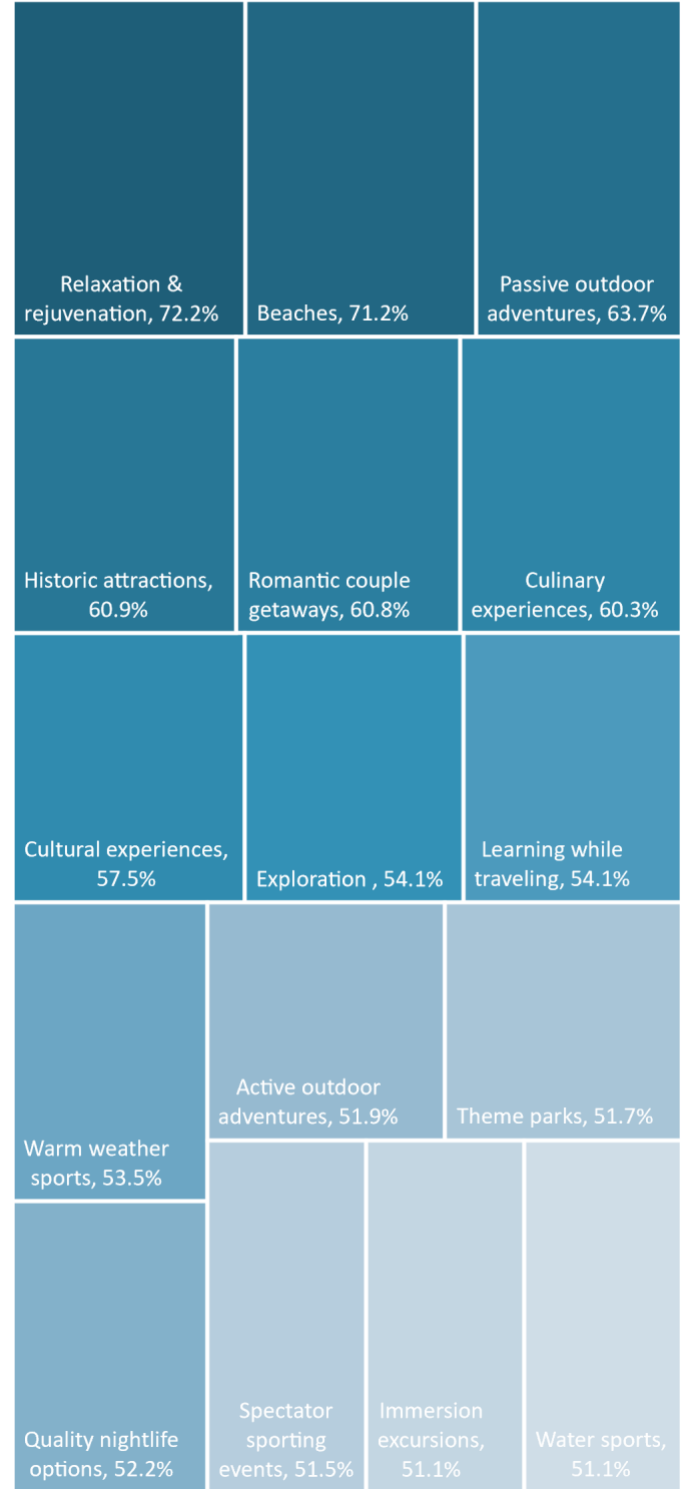
TABLE 39: Preferred Travel Months

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

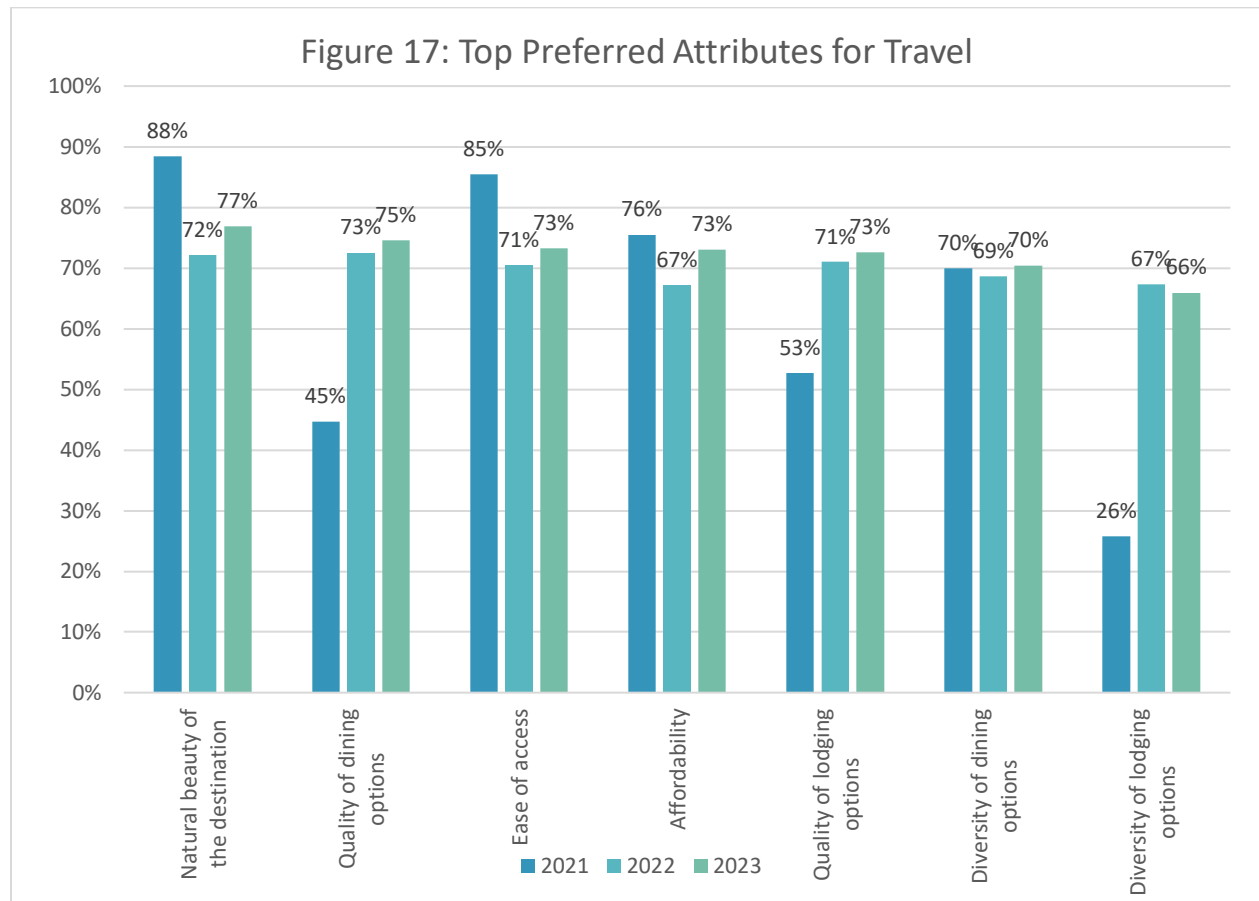
“Appealing” + “Very Appealing”	2021	2022	2023
Relaxation & rejuvenation	85.4%	66.9%	72.2%
Beaches	88.4%	65.1%	71.2%
Passive outdoor adventures	72.6%	64.4%	63.7%
Historic attractions	75.5%	64.4%	60.9%
Romantic couple getaways	70.0%	65.0%	60.8%
Culinary experiences	70.1%	63.7%	60.3%
Cultural experiences	70.7%	62.9%	57.5%
Exploration	57.5%	59.8%	54.1%
Learning while traveling	60.9%	56.3%	54.1%
Warm weather sports	52.7%	61.2%	53.5%
Quality nightlife options	52.6%	60.3%	52.2%
Active outdoor adventures	46.8%	59.6%	51.9%
Theme parks	44.7%	58.7%	51.7%
Spectator sporting events	49.2%	57.0%	51.5%
Immersion excursions	49.6%	57.4%	51.1%
Water sports	48.8%	60.4%	51.1%
Luxury camping	39.9%	55.0%	50.7%
Performing/cultural arts getaways	51.2%	58.6%	50.5%
Art	49.8%	57.1%	49.2%
Urban getaway	48.4%	58.5%	48.0%
Medical/wellness	40.8%	55.5%	47.9%
Waterparks	40.3%	54.4%	47.9%
Winter sports	30.2%	53.9%	42.5%
Golf getaways	37.4%	50.6%	41.9%
Voluntourism	29.5%	49.9%	40.8%
Tennis getaways	25.8%	48.5%	36.2%
Total	949	1,005	1,625

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	2023
Natural beauty of the destination	88.4%	72.1%	76.9%
Quality of dining options	44.7%	72.5%	74.6%
Ease of access	85.4%	70.5%	73.3%
Affordability	75.5%	67.2%	73.0%
Quality of lodging options	52.7%	71.0%	72.6%
Diversity of dining options	70.0%	68.6%	70.4%
Diversity of lodging options	25.8%	67.3%	65.9%
Low traffic congestion	60.9%	64.8%	63.6%
Travel distance	70.7%	63.1%	63.3%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%
Activities like events/festivals	49.6%	64.2%	55.4%
Nightlife activity options	48.4%	61.4%	53.2%
Medical/wellness	37.4%	60.4%	52.6%
Public transportation	57.5%	57.0%	49.2%
Total	949	1,005	

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
I would rather rely on a travel agent or tour operator than make my own travel arrangements.	10.6%	21.7%	29.9%	26.4%	11.3%
I try to support the local economy of places that I visit.	22.9%	42.8%	19.4%	12.3%	2.5%
N 973					

TABLE 42: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
Los Angeles-Long Beach-Anaheim, CA	106	9.3%
New York-Newark-Jersey City, NY-NJ	79	6.9%
Atlanta-Sandy Springs-Roswell, GA	44	3.9%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
San Francisco-Oakland-Fremont, CA	39	3.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
Chicago-Naperville-Elgin, IL-IN	34	3.0%
Pittsburgh, PA	33	2.9%
Charlotte-Concord-Gastonia, NC-SC	23	2.0%
Columbus, OH	23	2.0%
Detroit-Warren-Dearborn, MI	20	1.8%
Charleston-North Charleston, SC	17	1.5%
Louisville/Jefferson County, KY-IN	17	1.5%
Rural OH	16	1.4%
Boston-Cambridge-Newton, MA-NH	15	1.3%
Cincinnati, OH-KY-IN	15	1.3%
Houston-Pasadena-The Woodlands, TX	15	1.3%
Kansas City, MO-KS	15	1.3%
Albany-Schenectady-Troy, NY	14	1.2%
Baltimore-Columbia-Towson, MD	14	1.2%
Austin-Round Rock-San Marcos, TX	13	1.1%
Riverside-San Bernardino-Ontario, CA	13	1.1%
San Diego-Chula Vista-Carlsbad, CA	13	1.1%
Jacksonville, FL	12	1.1%
Wisconsin Rapids-Marshfield, WI	12	1.1%
Greenville-Anderson-Greer, SC	11	1.0%
St. Louis, MO-IL	11	1.0%
Akron, OH	10	0.9%
Columbia, SC	10	0.9%
Rural TX	10	0.9%
Indianapolis-Carmel-Greenwood, IN	9	0.8%
La Crosse-Onalaska, WI-MN	9	0.8%
Rural KY	9	0.8%
San Jose-Sunnyvale-Santa Clara, CA	9	0.8%
Miami-Fort Lauderdale-West Palm Beach, FL	8	0.7%
Minneapolis-St. Paul-Bloomington, MN-WI	8	0.7%
Allentown-Bethlehem-Easton, PA-NJ	7	0.6%
Buffalo-Cheektowaga, NY	7	0.6%
Cape Coral-Fort Myers, FL	7	0.6%
Clarksburg, WV	7	0.6%
Denver-Aurora-Centennial, CO	7	0.6%
Fayetteville-Springdale-Rogers, AR	7	0.6%
Milwaukee-Waukesha, WI	7	0.6%
Orlando-Kissimmee-Sanford, FL	7	0.6%
Rochester, NY	7	0.6%

MSA	Count	Percent
San Antonio-New Braunfels, TX	7	0.6%
Dayton-Kettering-Beavercreek, OH	6	0.5%
Fresno, CA	6	0.5%
Jackson, MS	6	0.5%
Johnstown, PA	6	0.5%
Lancaster, PA	6	0.5%
Las Vegas-Henderson-North Las Vegas, NV	6	0.5%
Little Rock-North Little Rock-Conway, AR	6	0.5%
Sacramento-Roseville-Folsom, CA	6	0.5%
Beaumont-Port Arthur, TX	5	0.4%
Birmingham, AL	5	0.4%
Fayetteville, NC	5	0.4%
Killeen-Temple, TX	5	0.4%
Lansing-East Lansing, MI	5	0.4%
Memphis, TN-MS-AR	5	0.4%
Phoenix-Mesa-Chandler, AZ	5	0.4%
Rural IA	5	0.4%
Rural ME	5	0.4%
Rural NY	5	0.4%
Savannah, GA	5	0.4%
Seattle-Tacoma-Bellevue, WA	5	0.4%
Toledo, OH	5	0.4%
Anchorage, AK	4	0.4%
Boise City, ID	4	0.4%
Brainerd, MN	4	0.4%
Calhoun, GA	4	0.4%
Findlay, OH	4	0.4%
Lafayette-West Lafayette, IN	4	0.4%
Ocala, FL	4	0.4%
Providence-Warwick, RI-MA	4	0.4%
Richmond, VA	4	0.4%
Rural CO	4	0.4%
Rural ND	4	0.4%
Asheville, NC	3	0.3%
Athens-Clarke County, GA	3	0.3%
Atlantic City-Hammonton, NJ	3	0.3%
Deltona-Daytona Beach-Ormond Beach, FL	3	0.3%
Erie, PA	3	0.3%
Greensboro-High Point, NC	3	0.3%
Gulfport-Biloxi, MS	3	0.3%
Omaha, NE-IA	3	0.3%
Panama City-Panama City Beach, FL	3	0.3%
Roanoke, VA	3	0.3%
Rockingham, NC	3	0.3%
Rural AK	3	0.3%
Rural FL	3	0.3%
Rural KS	3	0.3%
Salinas, CA	3	0.3%
Stevens Point-Plover, WI	3	0.3%

MSA	Count	Percent
Sumter, SC	3	0.3%
Tucson, AZ	3	0.3%
Virginia Beach-Chesapeake-Norfolk, VA-NC	3	0.3%
Warner Robins, GA	3	0.3%
Albany, GA	2	0.2%
Augusta-Waterville, ME	2	0.2%
Chambersburg, PA	2	0.2%
Ellensburg, WA	2	0.2%
Fergus Falls, MN	2	0.2%
Keene, NH	2	0.2%
Kendallville, IN	2	0.2%
Maryville, MO	2	0.2%
Merced, CA	2	0.2%
Mobile, AL	2	0.2%
Modesto, CA	2	0.2%
Natchitoches, LA	2	0.2%
Pensacola-Ferry Pass-Brent, FL	2	0.2%
Port St. Lucie, FL	2	0.2%
Raleigh-Cary, NC	2	0.2%
Redding, CA	2	0.2%
Reno, NV	2	0.2%
Rural LA	2	0.2%
Rural MI	2	0.2%
Seneca, SC	2	0.2%
South Bend-Mishawaka, IN-MI	2	0.2%
Tallahassee, FL	2	0.2%
Terre Haute, IN	2	0.2%
Texarkana, TX-AR	2	0.2%
Torrington, CT	2	0.2%
Tulahoma-Manchester, TN	2	0.2%
Victoria, TX	2	0.2%
Cambridge, OH	1	0.1%
Decatur, IN	1	0.1%
El Paso, TX	1	0.1%
Jamestown-Dunkirk, NY	1	0.1%
Lake Havasu City-Kingman, AZ	1	0.1%
Las Vegas, NM	1	0.1%
Liberal, KS	1	0.1%
Manhattan, KS	1	0.1%
New Orleans-Metairie, LA	1	0.1%
Pullman, WA	1	0.1%
Russellville, AR	1	0.1%
Rutland, VT	1	0.1%
Sebastian-Vero Beach-West Vero Corridor, FL	1	0.1%
St. Cloud, MN	1	0.1%
Thomasville, GA	1	0.1%



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