



FISCAL YEAR 2023-2024

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**SOUTHERN  
BEAUFORT COUNTY  
DESTINATION MARKETING PLAN**





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# Year In Review

## VACATION PLANNER



MAIL FULFILLMENT  
**99.7K**

## WEBSITE

VISITS  
**304.2K**

REFERRALS  
**70.6K**



## BLUFFTON SOCIAL



@landrethsummer

TOTAL FOLLOWERS  
**39.4K**

IMPRESSIONS  
**11.7M**

## PAID MEDIA PARTNERSHIPS

GARDEN & GUN  
THE LOCAL  
**palate**  
FOOD CULTURE OF THE SOUTH



## BLUFFTON OCCUPANCY METRICS

OCCUPANCY  
**61.6%**

ADR  
**\$306.27**

REVPAR  
**\$188.80**

## BLUFFTON PUBLIC RELATIONS

MENTIONS  
**148**

IMPRESSIONS  
**540,978,585**

AD VALUE  
**\$397,854.66**



# Accolades

## **TRAVEL + LEISURE**

Bluffton named one of “8 Charming Small Towns in South Carolina from the Mountains to the Beach”

## **CNN**

Bluffton named one of “17 Great Family Vacation Ideas for Your Summer 2022 Trip”

## **MARKETWATCH**

Daufuskie Island one of “6 Seaside Getaways Off the Beaten Path”

## **FORBES**

Bluffton among “Best Places to Live in South Carolina”

## **PARENTS.COM**

Bluffton named one of the “31 Best Babymoon Trips”

## **FORBES**

Bluffton among “Top Places to Celebrate Thanksgiving”

## **TRAVEL + LEISURE**

Daufuskie Island named among “12 Best Tropical Vacations in the U.S.”

## **TRAVEL + LEISURE**

Haig Point one of “13 Best Places to Retire for Golf Lovers”

## **FORBES**

Bluffton named one of “Forbes Travel Guide’s 2022 Star Award Winners”

## **CBS NEWS**

Daufuskie Island named one of “The Best Family Vacation Trips for Summer 2022”

## **FODERS**

Daufuskie Island one of “13 Hidden Beaches Across the U.S.”



# Executive Summary

The Hilton Head Island-Bluffton Chamber of Commerce/Visitor & Convention Bureau continues to be the leader in promoting tourism within the Lowcountry. The organization as a whole utilizes national economic and tourism trends, consumer research, prior program performance, demographics and takes into consideration the needs of our community (residents and businesses) to be in the best position as the steward of the destination.

The following pillars have been identified for marketing efforts:

1. Gullah Geechee Cultural Heritage Corridor
2. History, Culture, and Arts
3. National Historic Register Designations
4. Natural beauty, Waterways, Parks
5. Local Culinary and Local Market Experiences
6. Festival and Events



## Vision

A welcoming world-class community embracing nature, culture, and economic vibrancy to residents and visitors.

## Mission

Stimulate the regional economy while enhancing the quality of life for all.

## Bluffton's Brand Commitment

Bluffton, Heart of the Lowcountry™, speaks to the town's central location, its loveable characteristics, and that Bluffton is the pumping, economic life force of the Lowcountry. Most importantly, it's a tone and a feeling. When you're in the Town of Bluffton, you can see and feel the love. It's real and authentic. It's the heart symbol in your logo, on a window, the pride residents have in their downtown or the warmth shared with strangers at an oyster roast. The Town of Bluffton is a well-kept secret. Nowhere else in the Lowcountry do you feel the love like you do when you are in Bluffton.

## Daufuskie Island's Brand Commitment

As an extension of Hilton Head Island and Bluffton, Daufuskie Island provides a more remote escape to the visitors of Southern Beaufort County, one that's even closer to nature and "off the beaten path." The elements of the brand personality related to tranquility and nature are strong with identity and expression.

# 2023-2024 Goal, Strategies & Tactics

**Goal:** The overarching goal of the marketing plan is to drive qualified visitation to the destination through a series of demand creation and demand capture activations.

## Strategies

1. Build brand awareness and support qualified visitation to the destination among target out markets.
2. Drive the discovery and exploration of the destination with deeper storytelling of the destination's key attributes.
3. Leverage a strategic mix of targeted methods to identify and reach the most qualified users.
4. Create an understanding of, and respect for, the delicate ecosystem of the destination.
5. Enhance Leisure and Group business through qualified visitation.

## Tactics

1. Paid and organic social media strategy across all platforms with creation of new assets and content for videos/reels/stories, and sourcing of user-generated content (UGC).
2. Email marketing, display remarketing advertising, search engine marketing, search engine optimization, and digital media.
3. Development and production of the Official Vacation Planner.
4. Traditional ad placements in print and digital with partners, as an example, *Garden & Gun* and *Southern Living*.
5. Strategically target audiences according to the demographic and persona profiles specific to Southern Beaufort County through paid and organic efforts.
6. Develop additional content (blogs, social posts, videos), designed to tell stories about the destination, its history, culture, and beautiful scenic touchpoints, such as the May River, historical locations, and parks, in engaging and informative ways and include tips and itineraries to guide visitors through the destination for deeper experiences.
7. Public relations efforts including media outreach, partnerships, influencers, and earned media placements.



# Budget

## Southern Beaufort County Budget (FY 2023-2024)

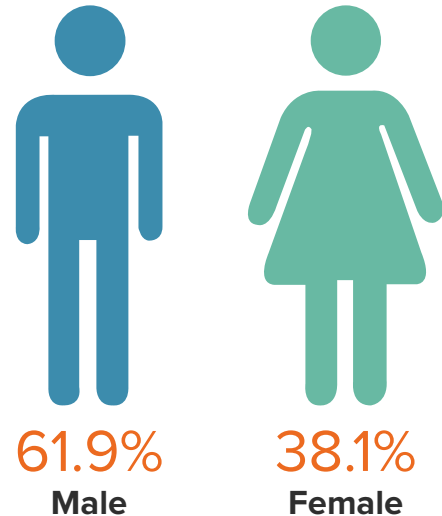
	FY 2024 BUDGET
<b>REVENUES</b>	
Southern Beaufort County DMO	\$385,000
<b>TOTAL REVENUES</b>	<b>\$385,000</b>
<b>EXPENSES</b>	
Research & Planning	\$9,600
Website Maintenance	\$14,400
Website Hosting	\$864
Social Marketing & Content Strategy	\$14,400
Paid Social	\$35,568
Digital Promotions / SEM	\$24,400
SEO	\$8,640
Insiders (enews)	\$9,600
Blog	\$6,528
Bluffton Vacation Planner/Fulfillment	\$56,640
Regional Vacation Planner/Fulfillment	\$16,800
Media Partnerships	\$24,000
Group Tour	\$960
Photography/Videography	\$19,200
Contingency	\$4,800
Ops & Management	\$138,600
<b>TOTAL EXPENSES</b>	<b>\$385,000</b>

# Demographics & Personas

We use multiple primary and secondary data sources to understand who our visitors are and what motivates them to visit Southern Beaufort County. Our real-time data sources include Google Analytics and Zartico, in addition, we partner with the Office of Tourism Analysis at the College of Charleston and the University of South Carolina Beaufort. Using these insights we are able to extract visitor persona detail which allows us the ability to further refine our messaging to a more qualified potential consumer.

Today, as we continue to adjust to the traveler's needs, we will keep our demographics and key personas at the forefront, adapting where necessary to address consumer travel sentiment.

## Our Target Leisure Traveler for the Region



Source: 2022 Bluffton Visitor Profile Study, Office of Tourism Analysis, College of Charleston



**\$150-\$250K+**  
**Affluent Traveler**



**53%**  
**Undergraduate Degree or Higher**



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

Source: 2022 Bluffton Visitor Profile Study, Office of Tourism Analysis, College of Charleston



Persona	Tactic	
<b>Family</b>	<ul style="list-style-type: none"> <li>Digital video/connected TV advertising</li> <li>Facebook /Instagram advertising</li> <li>Social and blog itineraries</li> </ul>	<ul style="list-style-type: none"> <li>Search advertising</li> <li>Influencer family partnership</li> </ul>
<b>Weekenders</b>	<ul style="list-style-type: none"> <li>Couples</li> <li>Paid search targeting branded and category terms such as “weekend getaway”</li> </ul>	<ul style="list-style-type: none"> <li>Friend groups</li> <li>Weekend itineraries for blog/site/social</li> <li>Social advertising</li> </ul>
<b>Arts, Culture &amp; History Buffs</b>	<ul style="list-style-type: none"> <li>Google Display Network and social display</li> <li>Digital video/connected TV advertising</li> <li>Culture &amp; History itineraries</li> <li>Influencer partnership content</li> </ul>	<ul style="list-style-type: none"> <li>Long-form content (blogs)</li> <li>Social advertising</li> </ul>
<b>Culinary Travelers</b>	<ul style="list-style-type: none"> <li>Digital /connected TV advertising</li> <li>Restaurant listings</li> <li>Social advertising</li> </ul>	<ul style="list-style-type: none"> <li>Influencer partnership content</li> <li>Long form content (blogs)</li> </ul>
<b>Activities &amp; Recreation Enthusiasts</b>	<ul style="list-style-type: none"> <li>Social advertising</li> <li>Digital video/connected TV advertising</li> </ul>	<ul style="list-style-type: none"> <li>Maps and itineraries outlining convenience of staying in proximity to nearby activities and experiences</li> </ul>
<b>Snowbirds</b>	<ul style="list-style-type: none"> <li>Digital video advertising</li> <li>Search advertising</li> <li>Food itineraries and tour information</li> </ul>	<ul style="list-style-type: none"> <li>Organic social posts focused on food and drink</li> <li>Festival &amp; Event information and promotions</li> </ul>



The background of the page is a close-up photograph of a fishing net and several thick, light-colored ropes. The net is made of a dark, square-patterned mesh and is partially visible on the right side. The ropes are bundled together and run vertically across the left and center of the image. The overall tone is warm and nautical.

# 2023-2024 Destination Marketing Plan

The ultimate goal of the marketing strategy is to drive qualified visitation to the destination through a series of demand creation and demand capture marketing activations. The strategies support the discovery and exploration of experiences that exist throughout the Bluffton and Daufuskie Island.



# Digital Marketing

The proposed approach to Southern Beaufort County's marketing plan, outlined below, is meant to communicate how Bluffton and Daufuskie Island can best be experienced by a diverse group of target audiences.

From the May River to arts and culture, culinary, and outdoor activities, and a vibrant and authentic local community, Southern Beaufort County is perfectly positioned to meet the needs and interests of today's travelers.

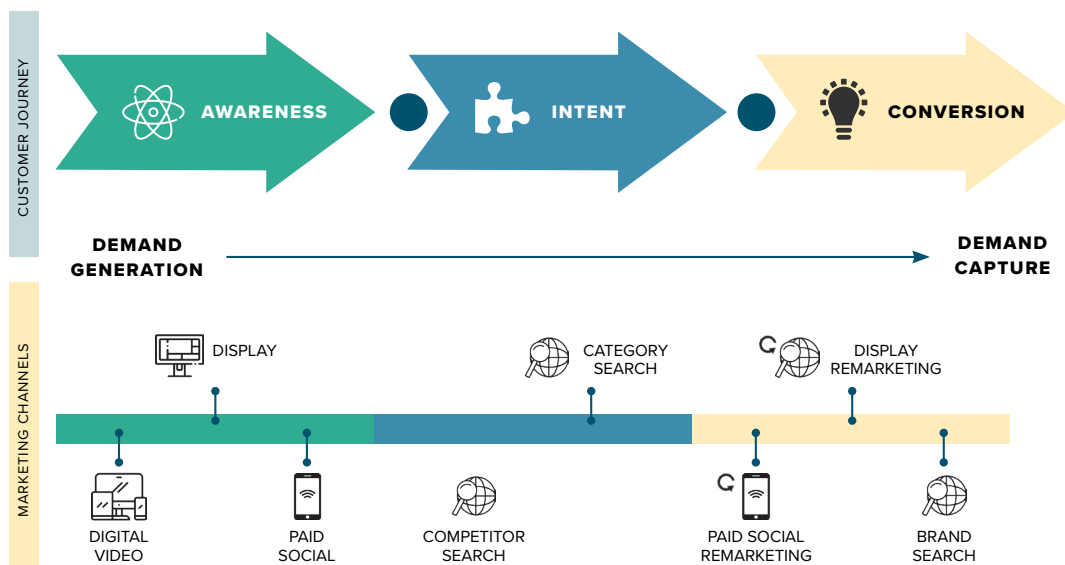
The marketing plan is designed to be highly personalized, flexible, and results-oriented. Each individual campaign that is implemented to drive exposure for the destination will be deployed based on a series of defined goals that align with each persona, and the overarching goal for the marketing plan.

## The Customer Journey

Our role as a destination marketing organization is to captivate qualified visitors by creating an emotional connection to the destination through targeted communications and compelling brand storytelling. A full-funnel marketing strategy to drive increased optics and referrals to partners throughout the region is required. Our efforts will place a specific emphasis on more awareness-focused marketing channels, using immersive and authentic brand content to reach new, qualified prospects the brand can deliver for our partners. We will feature locals and businesses throughout our efforts with authentic storytelling. We will continue to nurture repeat visitors and brand loyalists with our mid-funnel tactics.

## Conversion Focused Digital Marketing

The digital strategy is simple in that regardless of the channel strategy, each campaign is continuously optimized to drive increased conversions for Southern Beaufort County. The strategy will remain nimble, and scalable and all media purchased to drive exposure for the brand will be 100% measurable. As each phase is focused on a different goal and intent, measurements and benchmarks unique to Awareness, Intent, and Conversion are established to provide a holistic view of success.



## Content Commonwealth

The production of data-informed content that showcases the destination using our authentic lens is core to the ongoing integrated marketing strategy. The destination no longer operates in an environment where one-off artifacts of content are produced to serve a specific purpose in a particular channel. Instead, as content is produced to support the overall goal of the marketing plan, the strategies will focus on how content can live across the entire marketing ecosystem. This helps all content work harder for the destination while ensuring we connect with the right audience at the right time in their journey with the most relevant content based on their key travel motivators.

Traditional print and broadcast through the website, digital marketing, and social media efforts will share a consistent creative tonality to ensure the brand tone and voice are effectively communicated through each medium.

## Search Engine Marketing

We will continue to execute a search engine marketing (SEM) strategy to expand and broaden our organic rankings on major search engines. We will use a targeted list of key search terms that best correlate with Southern Beaufort County core audience segments and align with the key pillars mentioned in the executive summary.

Our efforts will align with our target consumers and influence them to visit the Bluffton and Daufuskie Island websites, ultimately directly increasing partner referrals.

## Display & Remarketing

The primary goal of display marketing efforts for Bluffton and Daufuskie Island is to cultivate consumers who have expressed interest in visiting the destination as noted by their online behavior, and then push them to VisitBluffton.org and VisitDaufuskie.org websites to explore, engage and ultimately book travel to the destination. Prospecting and native display banner partners will be distributed via:

- Facebook
- Instagram
- Google Display Network

Display remarketing is used to reinforce Bluffton and Daufuskie Island as the ideal vacation destination by serving ads to those who have visited the website previously. By implementing multiple windows, we can adjust bids and messages depending on where the consumer is in the travel journey.

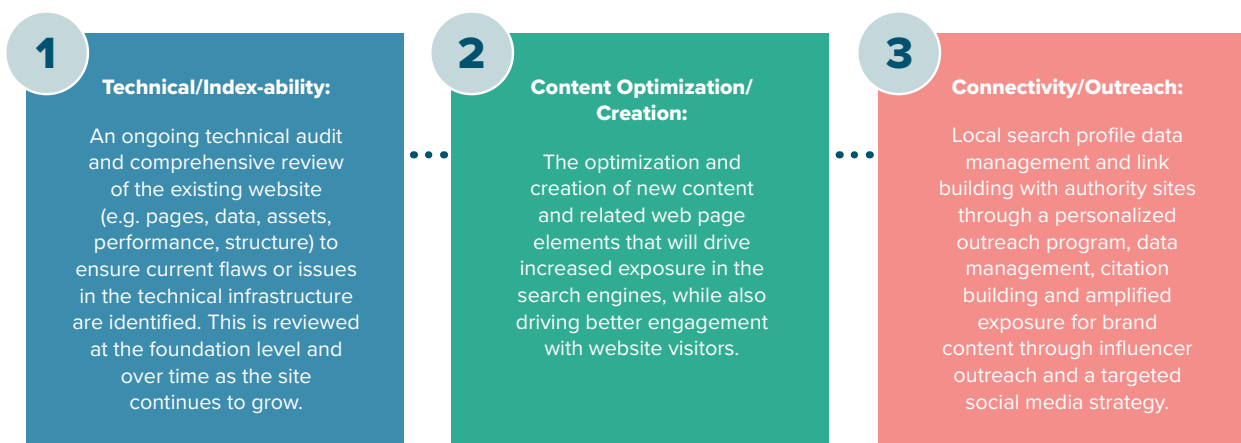


## Search Engine Optimization (SEO)

Search engine optimization (SEO) and content marketing is about getting found for the right reasons by people who matter to our brand. Our approach to ongoing SEO marketing initiatives is multifaceted and comprehensive. SEO starts with the very basic concepts of accessibility and indexability—being discovered by the right people for the right types of content—and spans to site architecture, social

media engagement, and long-term content marketing programs and backlink strategies.

To put it simply: we assess, build a strong foundation, analyze the results, and continue to build on the strategy over time. The ongoing SEO program for Southern Beaufort County can be broken down into 3 core areas:



This will be done with the publishing of regular blogs on the website, developed by the content team.

We will conduct research to identify content marketing opportunities to optimize blog content. This will open the site to new opportunities to build traffic from a natural search traffic perspective. Blog URLs should also be used in social media posts to help increase website traffic and engagement.

Specifically, we will provide recommendations about optimizing current content and creating new content and related page elements that will drive increased search engine exposure,

leading to better engagement with website visitors. Initially, optimization will be focused on identifying content areas on the website that require attention, while identifying gaps for future content creation that will need to be addressed based on ongoing competitive analysis and the monitoring of search interest trends. We will also regularly monitor the site for duplicate content and reduce or remove where possible to avoid redundancies.

# The Destination Websites

The websites are an integral part of the destination marketing efforts for the brand and serve as one of the first touchpoints for Bluffton and Daufuskie Island. We will continue to dive deeper into identifying qualified visitors, ensuring a streamlined experience and ultimately sending relevant leads, in the form of qualified traffic, to partner sites. We will refresh copy as needed and create new engaging content to keep the website updated and current. Ongoing optimizations of content and structure will be made based on SEO research, trends data, and referral insights.





## Data Strategy & Personalization

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

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

## Social Media

Social media continues to be a strong performing platform for the destination. In 2023-2024, we will continue to strategically grow our following and engagement.

### These are the channels that best support our social media goals:



**YouTube:** YouTube is the second most engaging website globally and is also the second most popular search engine after Google. YouTube launched YouTube Shorts which expresses the importance of developing a bank of short-form video assets. Our Explore Bluffton video series was released in 2021 and we continue to promote these videos on our social channels directing users to YouTube. We will continue to promote the videos and work to put together a list of additional businesses and community members to capture footage with to further engage the community, promote the destination, and grow our YouTube channel.



**Facebook:** Facebook has 2.91 billion monthly active users and is our most high-value social channel. Our approach to Facebook is to incorporate a range of content, user-generated content shared by locals and guests, co-ops, one-off and ongoing events, and planned activities like tours, and excursions.



**Twitter:** We will continue to leverage Twitter as a secondary channel for Bluffton and Daufuskie Island as a place to reshare user-generated content, event announcements and relevant news. We will continue to focus on our short-form video and UGC strategy which is in line with social media trends and where we see the most positive engagement from our audience.



**Instagram:** Instagram’s strategy will continue to focus on curating user-generated content. Our biggest push on this channel will be to engage in two-way conversations with our followers, to encourage them to mention our channel in their owned content. We will also focus on curating a more aesthetically-consistent feed, using warm photo filters that portray the sunny, Southern vibe of the Lowcountry. A heavy focus on Instagram story series will get shared to further connect with followers in real-time. We will develop engaging reels to promote the destination with trending music and hashtags. We will create and share blog-type style posts bringing together various user generated content (UGC) and help with planning a trip to the destination.



**TikTok:** TikTok has over a billion active users and is starting to become the leading platform for travel tips, hacks, and must-see/do experiences within a destination. In the fall of 2022, we launched our TikTok channels and have made excellent strides in follower growth, views and likes. As TikTok continues to develop its features it provides us with unique story-telling opportunities to reach a new and broader audience and repurpose our high-performing reels content from Instagram to reach new audiences.



**Pinterest:** We will continue to develop and share a mix of highly designed imagery on the platform to build a bank of pins on our Instagram channel. Our goal is to grow the following and increase the overall engagement on the page. We will do this by sharing content related to the destination, and connecting the pins with the relevant blogs.

## Email Marketing

Increased efforts to personalize the customer journey will include a dedicated email strategy, along with new and relevant drip campaigns mapped to the refreshed segments. These drip campaigns will be integrated with all key customer touchpoints where users are provided the opportunity to connect with the brand via email in exchange for invaluable content related to the destination. The destination’s email efforts will be informed by SEO research and tested and optimized over the course of the year.

## Blog

Our blog will drive qualified, engaged traffic to VisitBluffton.org and VisitDaufuskie.org. It’s a landing place to bring people in from our social feeds, and a great jumping-off point to show users what is happening in Bluffton and Daufuskie Island. Tied closely to search engine results, our goal with the blog is to create a useful tool for fun, inspiration, informational, travel tips, news, and more. Content on this channel to be used cross-promotionally on other channels could include:

- Long-form, editorial pieces
- Recipes and “insider tips” from partner restaurants, hotels, and attractions
- Itineraries:
  - For Different Demographics
  - For Different Interests
  - For Different Vacation Lengths
- Local features



# Leisure Media Campaigns

Bluffton and Daufuskie Island are well positioned with the product travelers are looking to experience. They are looking for open spaces and deep connections with culture, history, cuisine, and natural beauty. Accolades and inclusion on top publication lists bring our brand top of mind for travelers as they look to plan their next vacation.

Our media strategy will focus on infusing local personality into our media efforts that allows the consumer to connect with the destination and inspire them to travel to Bluffton and Daufuskie Island to discover more. We will further our reach with existing partners we have developed relationships with over the years as well as look to new partnerships to create a more diverse profile, ultimately expanding our visitor demographics. Examples

could include, but not limited to: *Garden & Gun*, *Southern Living*, *Essence Magazine* and *O Magazine (Oprah Magazine)*. We will also look to engage travel advisors as we have seen post-pandemic that more people are engaging their efforts for travel planning.

By utilizing these platforms and endorsements to further amplify our voice, we are able to tell our brand story and leverage our overall marketing to help differentiate the destination from the competitive set and drive awareness and visitation to Bluffton and Daufuskie Island. Growing these relationships with these media partners will also help with our accolades and award designations from these publications.

As we look to build out these media partnerships, we will determine which publications are the best fit for the overall strategy and goal of our marketing plan efforts.



# Destination Public Relations

Earned media secured through public relations initiatives is a critical driver for destination awareness. As we look to the year ahead, it is important to note that the media landscape is shifting with more consumers getting their news and entertainment through mobile and digital platforms. We are also seeing influencers maintain their status as a trusted resource, inspiring purchase intent through their engaged following and curated content.

Despite economic challenges and inflation, travel demand has been consistently thriving over the past year. Consumers are looking to escape the nuances of daily life for a vacation and are not deterred by surging prices.

While leveraging core public relations tactics, we will continue to stay tapped in with our media contacts and remain agile throughout the next wave of media trends. With this approach, we will harness the momentum the destination has received to ensure that we remain in consideration as a must-visit U.S. destination as travelers continue to look towards their “escapism” adventures and make a vacation that visitors never want to leave.

Through public relations efforts, we will deliver a continuous drumbeat of media coverage, as well as social and digital chatter, allowing us to move the needle and maintain a competitive edge over like-minded destinations. Our goal is to inspire travelers to explore Bluffton and Daufuskie Island.





# Photography/Videography

We will continue to build an up-to-date, engaging, and on-brand bank of image and video assets that can be used across all marketing initiatives. Asset collection will be done strategically to align with planned campaigns, including identifying gaps and analyzing performance to see what assets perform best for our target demographic.





CALHOUN STREET  
One thousand one hundred sixty one feet this way →

Edisto →  
Eighty Miles

MARINE CORP AIR STATION  
BEAUFORT - 18 MILES

Beaufort →  
Eighteen Miles

Savannah-Hilton Head  
INTERNATIONAL  
← AIRPORT 21 MILES

PARRIS ISLAND - 11 MILES





# Meetings & Group Sales

The destination continues to grow and position itself as a group destination. The variety and quality of experiences for group visitors has never been more diverse, offering a robust arts, historical and cultural scene, with growing culinary experiences. We will continue to promote Bluffton and Daufuskie Island while attending travel tradeshow throughout the country.

## Group Tour

Group Tour remains an important market to maintain current and new relationships. Bluffton and Daufuskie Island continue to be an attractive destination for a hub and spoke opportunity. With Savannah 40 miles away, Beaufort 30 miles and Charleston just under 2 hours, the destination is ideal for groups to stay in one location for up to a week and focus on day trips from one central area.

## Industry Partnerships and Tradeshow

In order to achieve our goal of increasing qualified leads, we will continue to foster our industry partnerships with conference or meeting attendance/activations and promotion on their platforms.

Our presence at industry tradeshow continues to reinforce our willingness to partner with meeting planners and increase visibility to decision-makers. This opportunity represents a large portion of our efforts and how we can grow our qualified leads throughout the year; ultimately turning into booked business for the destination partners, heads in beds in key timeframes and accommodations taxes to continue to fill the pipeline year after year.

# Hilton Head Island – Bluffton

## Visitor & Convention Bureau

### 2023-2024 Tradeshow Schedule

NAME	DATE	LOCATION
Northstar Small & Boutique Meetings	July 9-11, 2023	Franklin, TN
Northstar Destination Southeast	August 13-15, 2023	Cape Coral, FL
Connect Marketplace	August 22-24, 2023	Minneapolis, MN
M&I Americas	October 1-4, 2023	El Paso, TX
Hosted Client Event	October 23, 2023	Charlotte, NC
HPN Partner Fair	October 25-27, 2023	Denver, CO
FICP Annual Conference	November 12-15, 2023	Marco Island, FL
Connect DC Connect Faith	November 26-29, 2023	Washington, DC
Accent East	November 28-30, 2023	Beaufort, SC
IPEC - Independent Planner Ed Conference	January 2024	TBD
SCSAE Tradeshow	January 2024	Columbia, SC
MPI Spring Summit	March 2024	Atlanta, GA
Luxury Meeting Summit	May 2024	Raleigh, NC; Charlotte, NC; Atlanta, GA
U.S. Travel Association IPW	May 2024	TBD
SCSAE Annual Conference	June 2024	TBD
Smart Meetings	June 2024	TBD







# Collateral and Fulfillment

The Official Vacation Planner, our comprehensive guide to what to see and do, is our primary print fulfillment piece for the destination. We receive many online, as well as media and phone inquiries, and distribute the planner to state and local welcome centers, airports, along with tradeshow and promotional events with media.

In today's more visual world, telling a story through pictures and graphics appeals more to our target demographic. To further entice these target markets, we have designed the Vacation Planner for visitors to better visualize their vacations and discover what the destination has to offer. This is an important element to the "Travel Planning Journey."

Southern Beaufort County's natural beauty is what sets the destination apart from other communities. By tapping into our portfolio of stunning photography and combining it with

updated content, we have transformed the Vacation Planner into a "look book" destination discovery piece so visitors can imagine themselves experiencing all things Lowcountry.

In addition to working with a digital and print publisher, our in-house marketing staff provides the business directory, local photography and editorial content management, editorial review and proofreading for this asset.

## Official Bluffton Vacation Planner Quantity: 25,000



## Official Hilton Head Island, Bluffton and Daufuskie Island Vacation Planner Quantity: 85,000



# Research & Analytics

Research provides powerful information to evolve and perfect the Visitor & Convention Bureau's marketing strategy. Throughout the year we will continue to extract detailed reports and information that guides us in understanding our visitors. These research programs will lead to marketing and advertising initiatives aimed at growing the tourism industry for Southern Beaufort County. The following programs will be ongoing:

- Maintain ThinkBluffton.org, the Chamber's online economic metrics portal.
- Partner with Smith Travel Research (STR) monthly reports which measure lodging occupancy, average room rates, room demand and RevPAR for hotels only. Includes monthly comparative report with competitive destinations.

- Partner with Key Data, monthly Home & Villa lodging reports on occupancy, average room rates.
- Collaborate with College of Charleston Office of Tourism Analysis and the University of South Carolina Beaufort.
- Subscribe to the U.S. Travel Association's (USTA) Travel Monitor Program and related reports.

These consistent research details provide insights to produce reports that provide a health check into tourism.





# Appendix

- *Personas*
- *2022 Social Recap*
- *2022 Website and Digital Marketing Recap*
- *2022 Public Relations Recap*
- *2022 Beaufort County Economic Impact Report*
- *2022 Bluffton Economic Impact Report*
- *2022 Bluffton Visitor Profile Study*







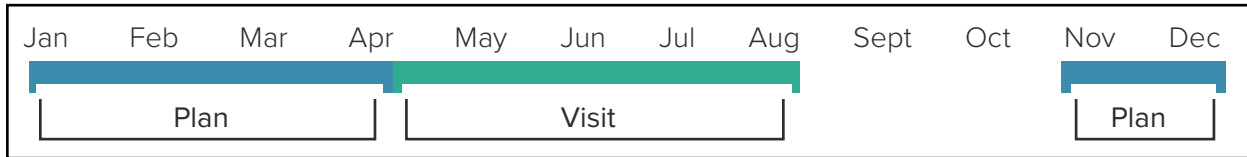
# Family



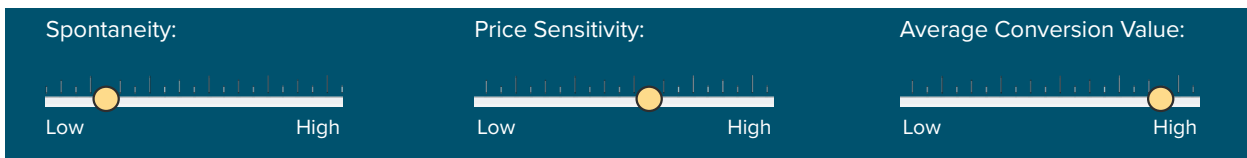


# Family Travel Objective

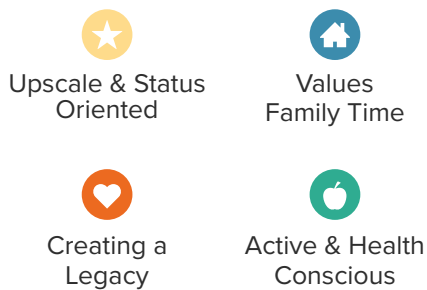
Find a vacation spot that will please everyone during the school holidays.



## Travel Habits



## Who They Are



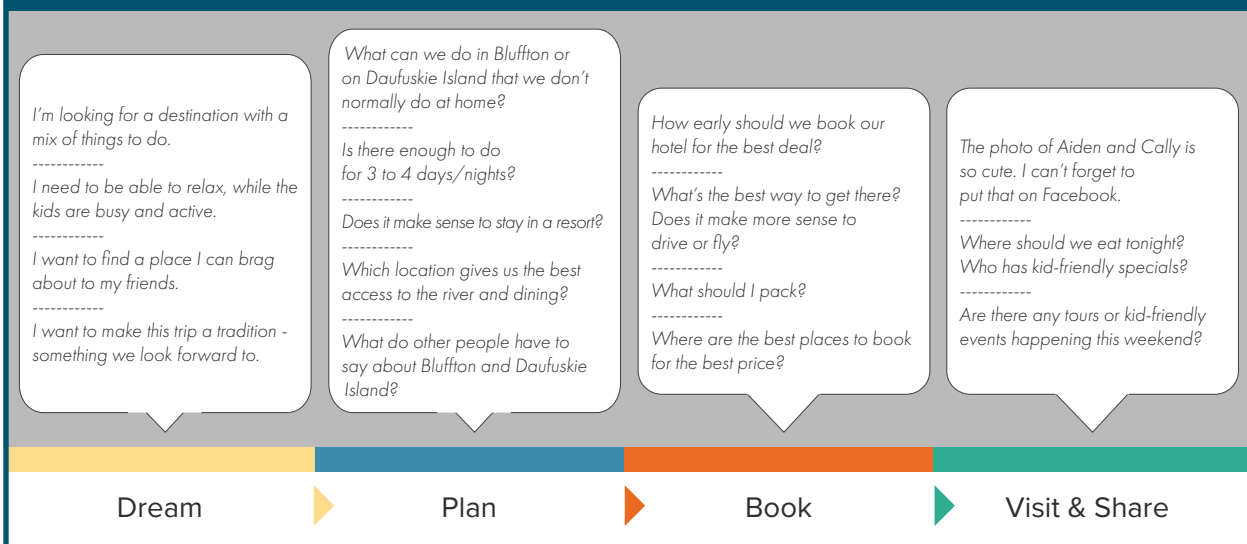
## Preferred Activities & Attractions

Resorts/Hotels  
Water Activities  
Walking Parks  
Festivals & Events  
Kid-friendly Dining  
Museums & Tours

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
TV  
Online Video  
Forums & Blogs  
Pinterest

## "Let's Make Memories." Their Path to Purchase



# The Weekender



# The Weekender Travel Objective

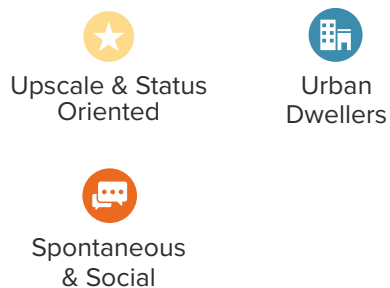
Find a fairweather weekend escape from work and city life.



## Travel Habits



## Who They Are



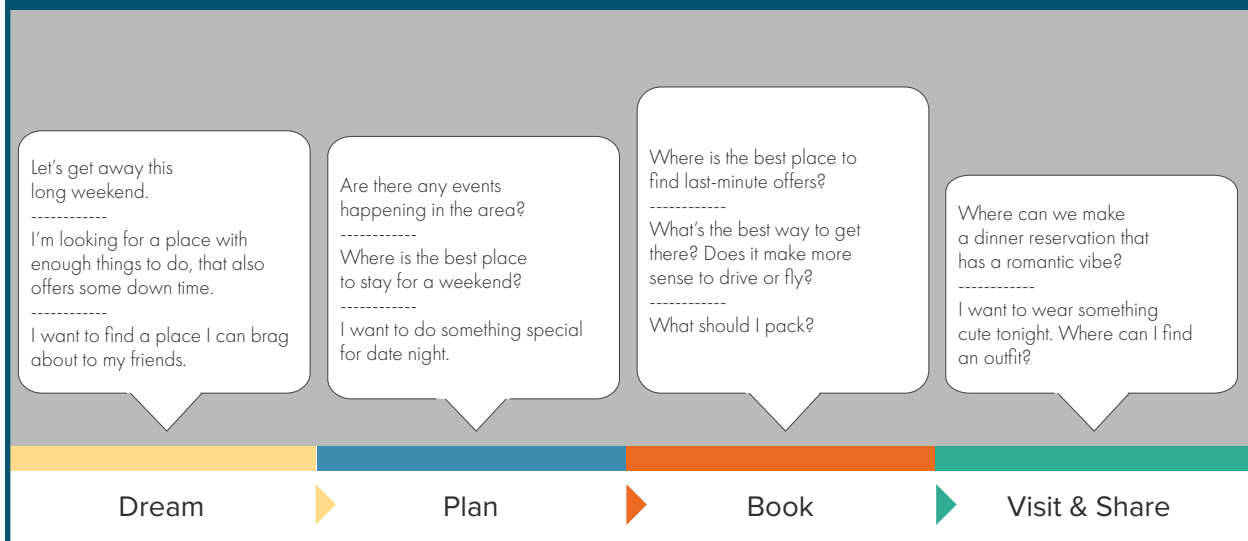
## Preferred Activities & Attractions

Vacation Rentals & Resorts  
Water Activities  
Dining & Shopping  
Romantic Things to Do  
Festivals & Events  
Weddings

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
TV  
Online Video  
Forums & Blogs  
Pinterest

## "Let's Get Away." Their Path to Purchase





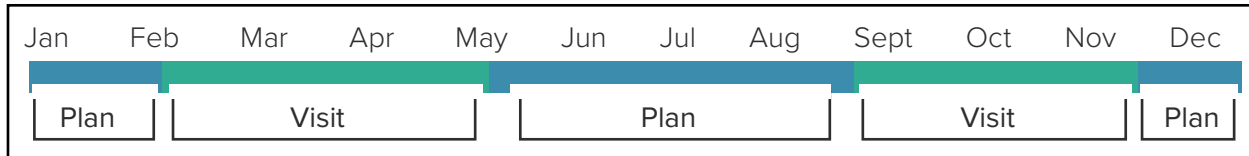
# Arts, Culture & History





# Arts, Culture & History Travel Objective

To explore cultural attractions, historical sites and the local arts scene.



## Travel Habits



## Who They Are

  
Values  
Learning  
& Authenticity



  
Seeking an  
Immersive  
Experience

  
Image  
Conscious

  
Upscale  
& Status  
Oriented

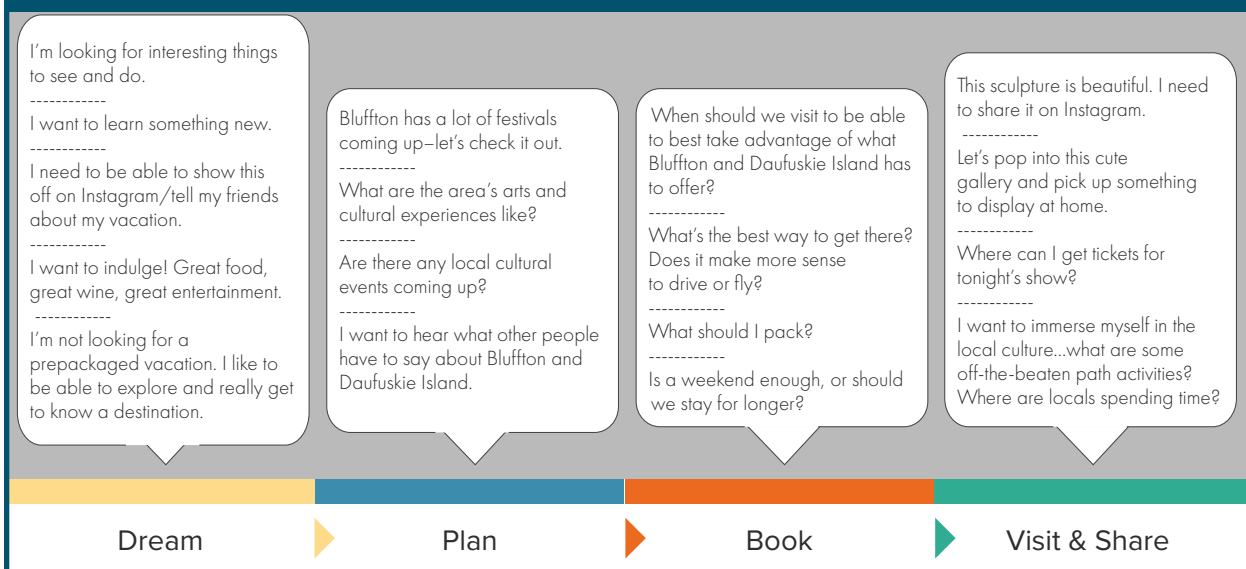
### Preferred Activities & Attractions

Historical District & Attractions  
Art District & Galleries  
Cultural District  
Gullah Geechee Cultural Heritage  
Festivals & Events  
Downtown

### Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
Online Video  
Forums & Blogs  
Pinterest  
Earned Media  
(Print/Digital)

## “Experiences are Greater than Things.” Their Path to Purchase



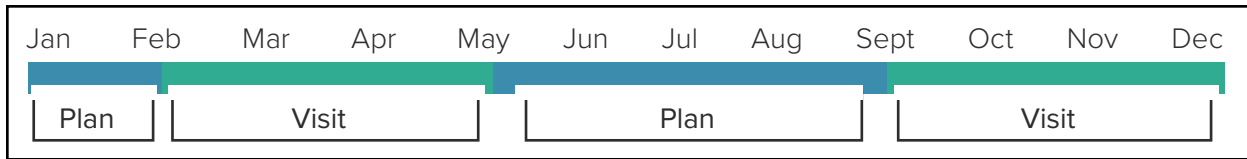


A close-up photograph of several oysters on ice with lemon wedges. The oysters are arranged on a bed of crushed ice, and several lemon wedges are scattered around them. The oysters are fresh, with their shells open, revealing the glistening meat inside. The lemon wedges are bright yellow and add a pop of color to the scene. The overall composition is appetizing and suggests a fresh seafood dish.

# Culinary

# Culinary Travel Objective:

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



## Travel Habits



## Who They Are

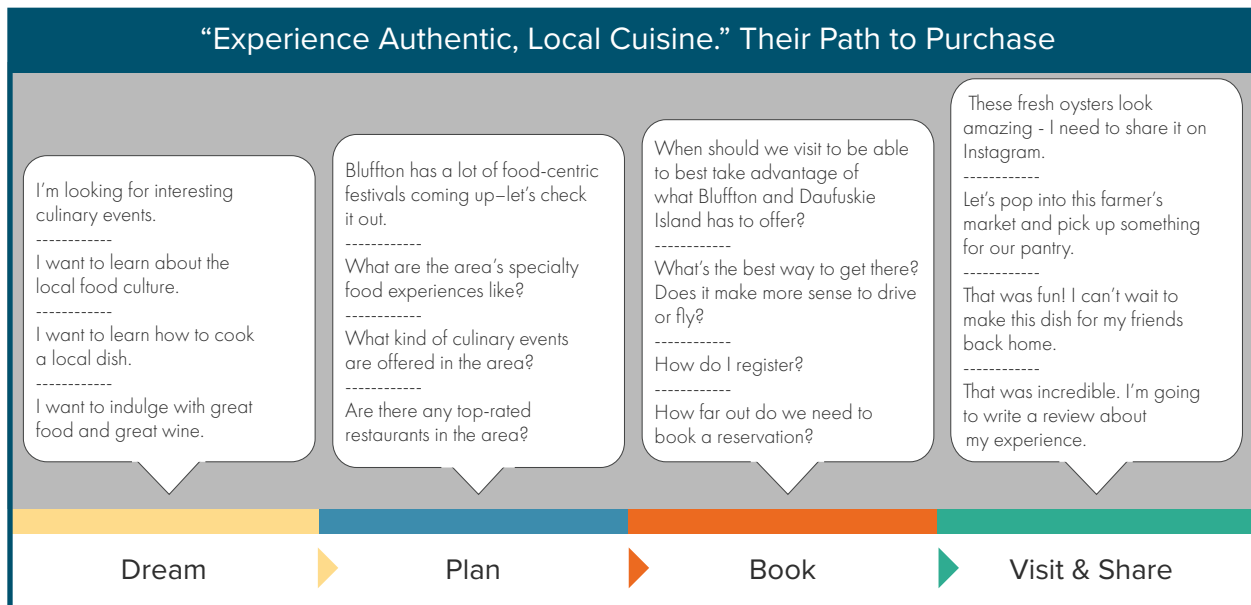


## Preferred Activities & Attractions

Food Events  
Food Tours  
Wine, Beer and Food Festivals  
Specialty Dining Experiences  
Oyster Roasts

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
Forums & Blogs  
Pinterest





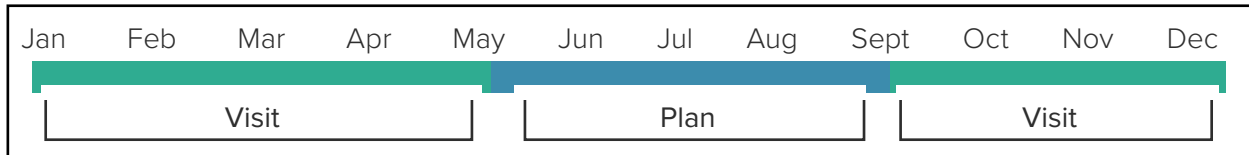
# Activities & Recreation Enthusiasts



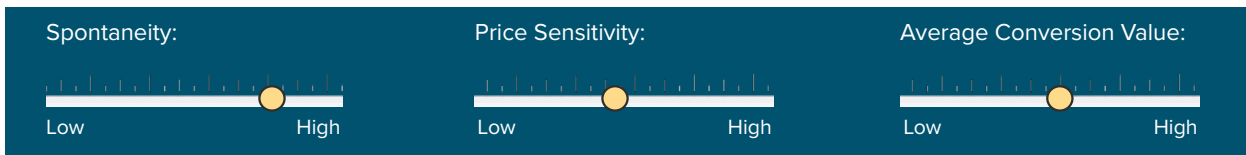
# Activities / Recreation Enthusiast

## Travel Objective

Find a destination where they can pursue their interests on their downtime.



## Travel Habits



## Who They Are



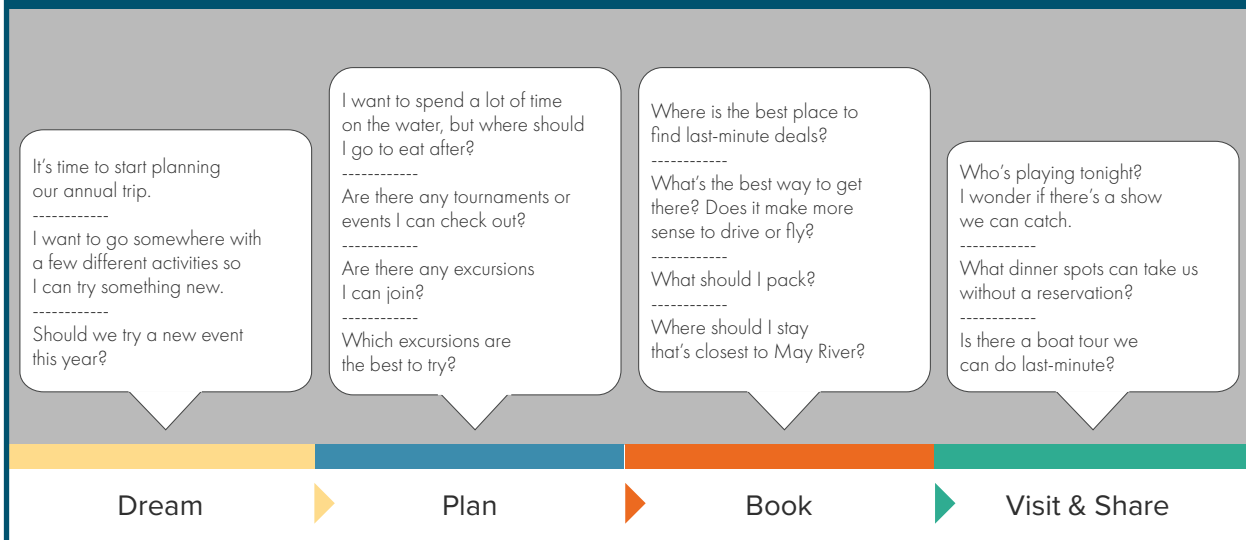
## Preferred Activities & Attractions

Boating & Water Activities  
Hiking & Biking  
Live Music & Shows  
Golf

## Marketing Channels & Formats

Facebook Videos  
Instagram  
Twitter  
TripAdvisor  
TV  
Online Video  
Forums & Blogs

## "Let's Explore." Their Path to Purchase





# Snowbirds

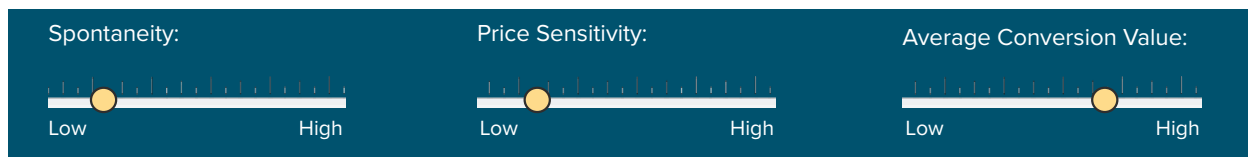


# Snowbirds Travel Objective

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



## Travel Habits



## Who They Are



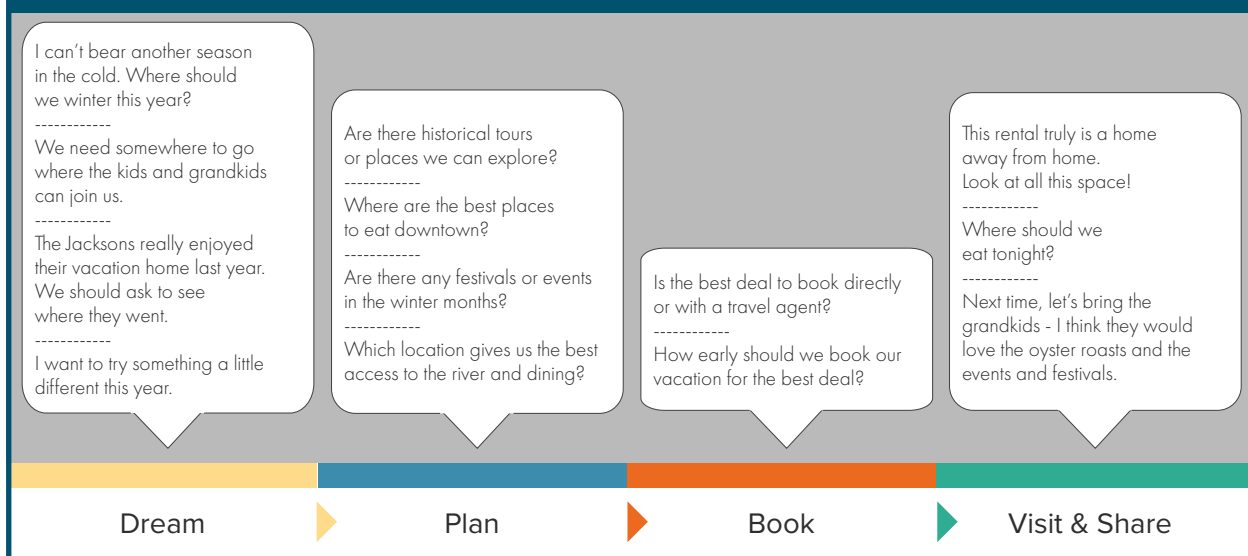
## Preferred Activities & Attractions

Vacation Rentals  
Dining  
Golfing  
History / Culture  
Excursion / Tour  
Walking

## Marketing Channels & Formats

Facebook  
Print  
TripAdvisor  
Radio  
TV  
Online Video

## “Let’s Make this Feel like Home.” Their Path to Purchase





# 2022 Social Recap



## 2022 Overview

Since the launch of dedicated Bluffton SC social accounts in 2019, we have continued to grow our following across key organic channels such as Facebook, Instagram, Twitter, Pinterest, and YouTube.

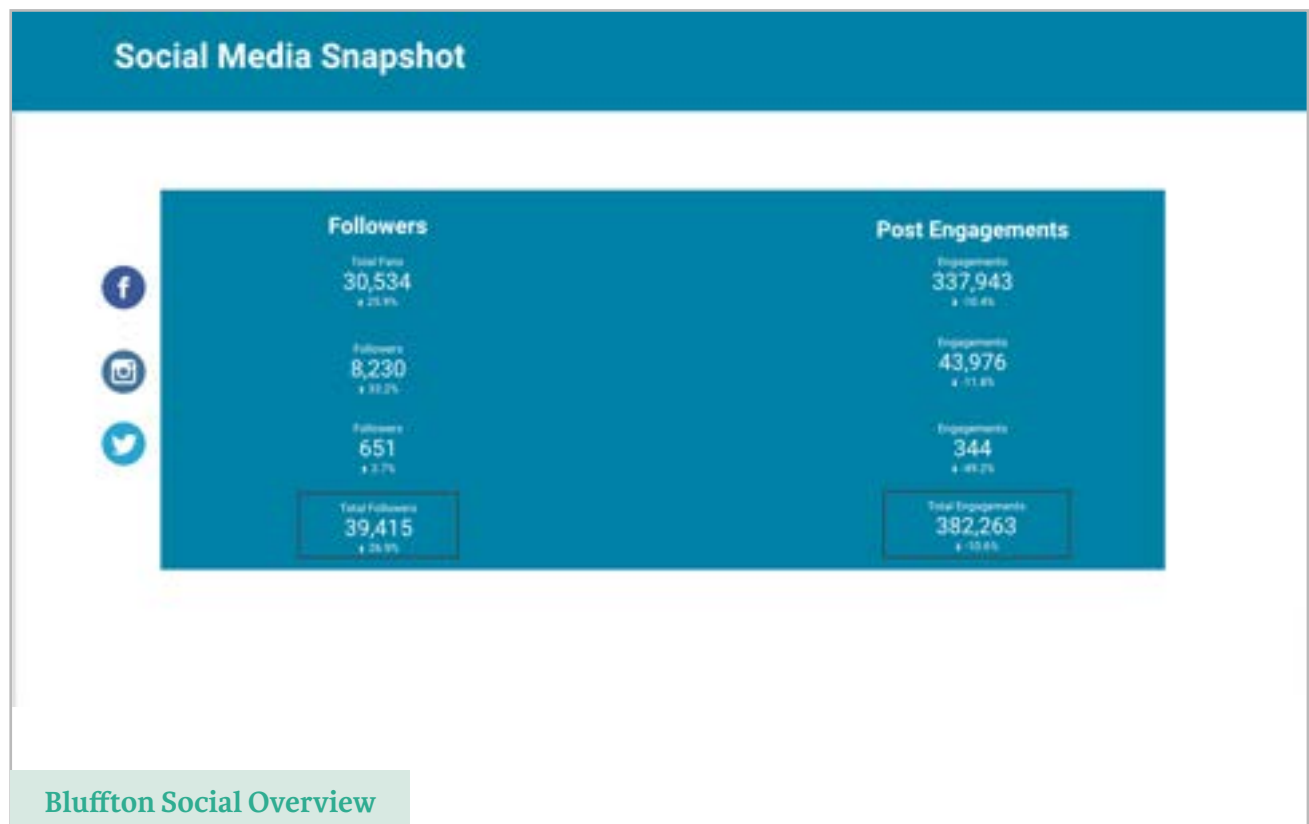
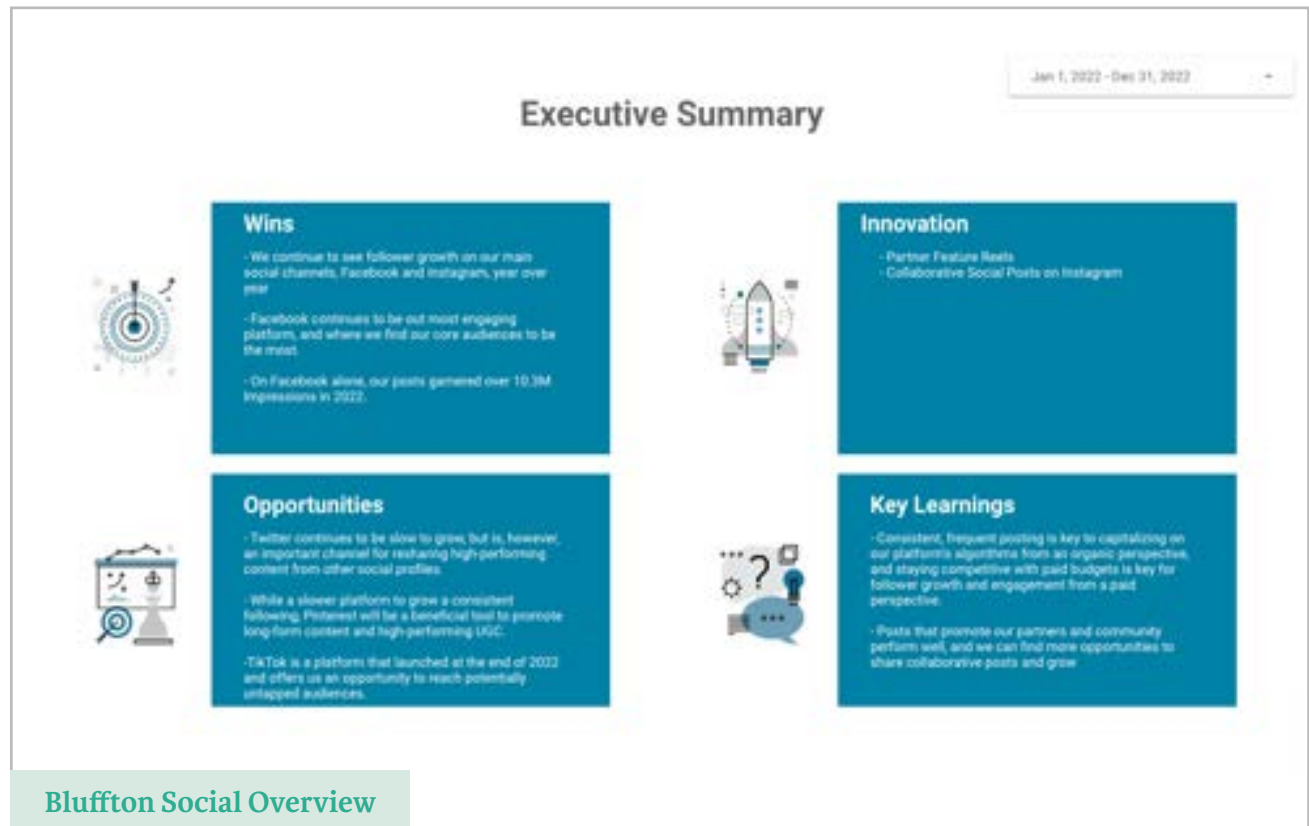
In November of 2022, we launched Bluffton's TikTok account as a means to reach potentially new, untapped audiences. Engaging this channel has also allowed us to repurpose our high-performing content from Instagram on another platform that opens us up to the possibility of increasing our reach exponentially.

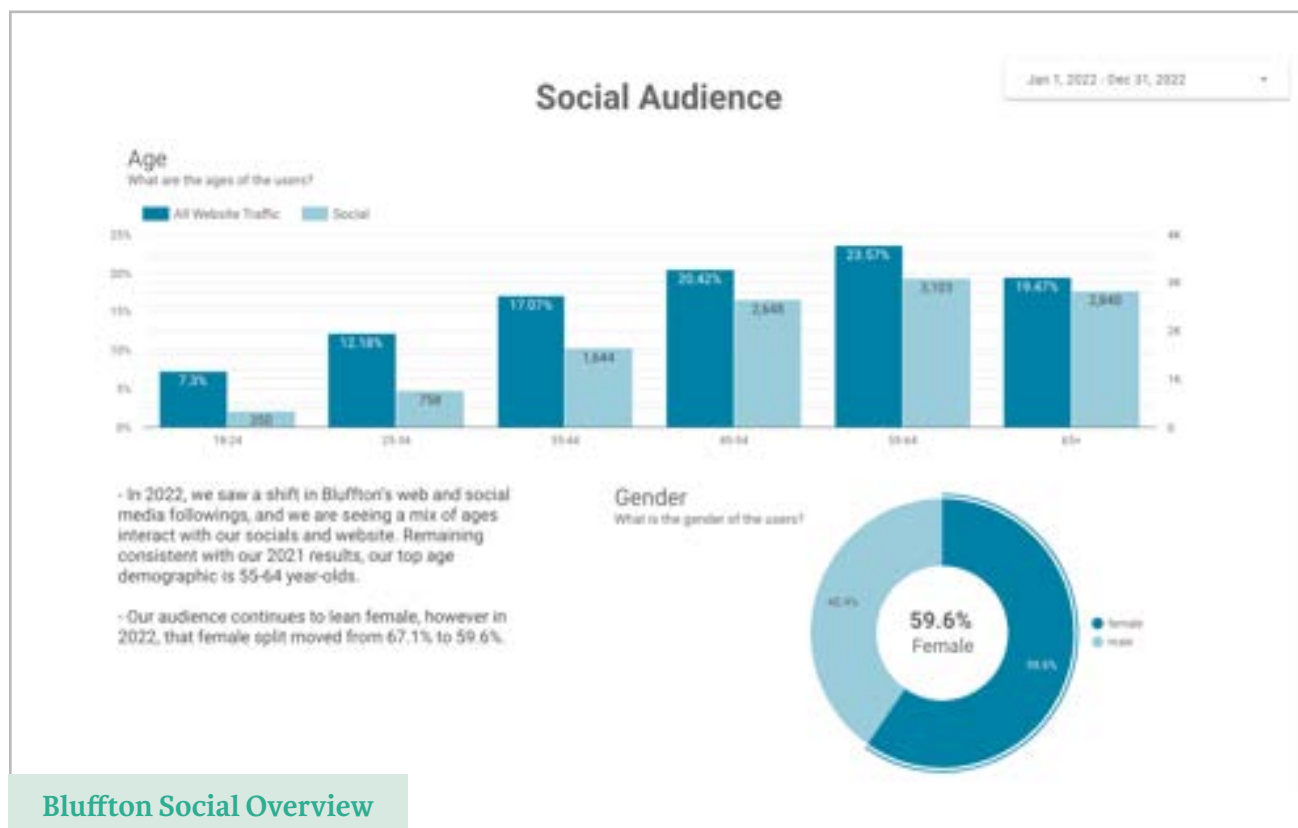
Throughout 2022, we continued to focus on our top-identified brand pillars, and featuring local businesses weekly on Instagram Stories and Reels. Collaborative partner posts on Instagram were leveraged to reach new audiences and help uplift our members' social channels.



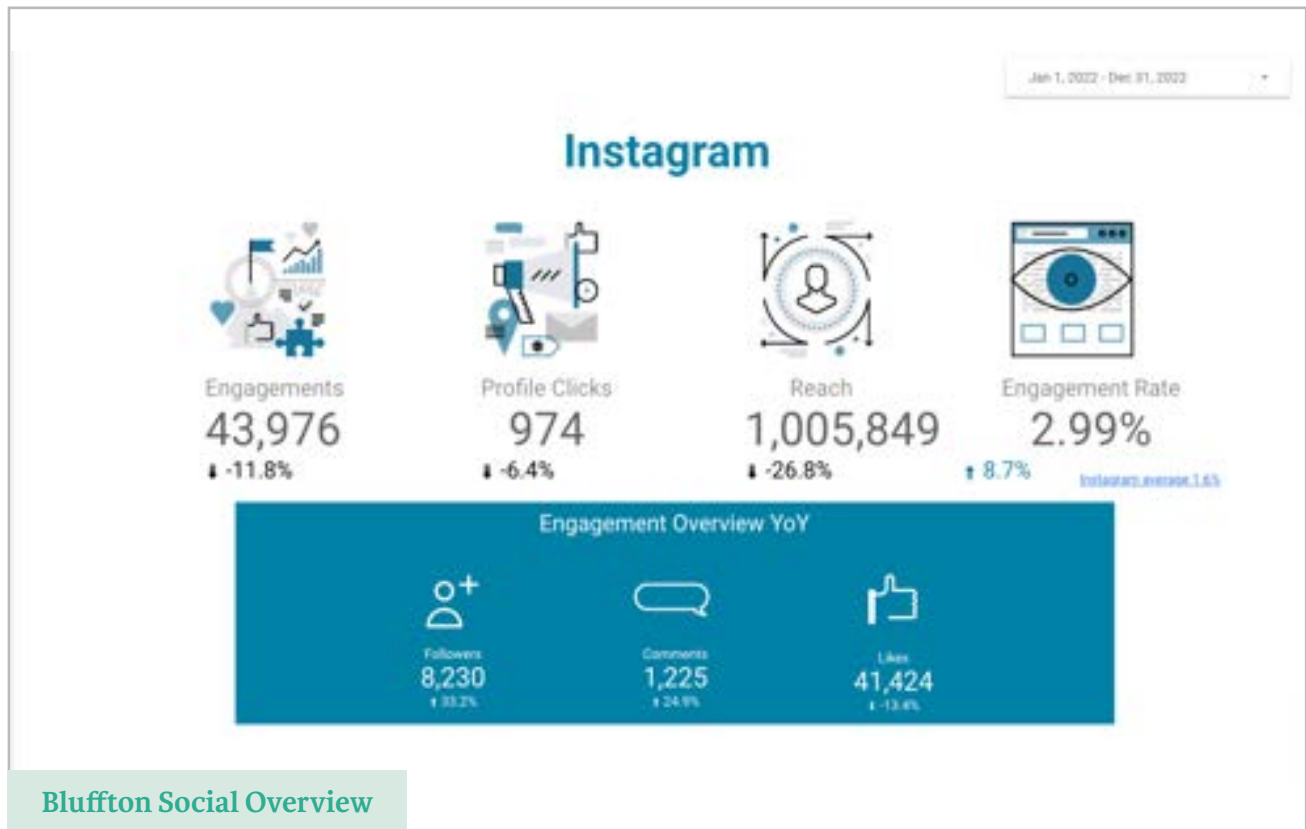
Bluffton Social Overview











Jan 1, 2022 - Dec 31, 2022

## Glossary

Term	Definition	Number
Backlinks	Links from other domains pointing back to our own, ultimately improving SEO	1
Booking Funnel	Illustrates the customer journey towards the purchase of a good or service	2
Bounce	When a user leaves your website from the landing page without visiting any other pages	3
Bounce Rate	The percentage of sessions on your website with only one page view	4
Conversion	A measured and tracked pre-determined goal, for example, obtaining email newsletter subscribers	5
Conversion Rate %	The percentage of users who take a desired action, aligned with the conversion goal	6
CPC	Cost per click, the cost of the media spend divided by the number of clicks	7
CTR	Click through rate, the percentage of impressions that resulted in a click	8
Direct Traffic	Users that come to your website via typing the URL, directly in a browser	9
Display Ads	Graphic advertising on website media through banners or other advertising formats made of text...	10
Domain Authority/Rank	An estimate of how well any given domain will perform in search	11
Ecommerce Conversion	The ratio of transactions to sessions, expressed as a percentage	12
Engagement Rate	Measures the level of engagement that content is receiving from an audience; it shows how muc...	13
Exit %	Percentage of users who viewed the page and exited the site	14
Exit Page	The page where a user exits your website	15
Impressions	The number of times an ad, search result, or a social post is viewed	16
Key Performance Indica...	Used to evaluate the success of a brand or campaign in meeting the objectives for performance	17

Bluffton Social Overview



# 2022 Website & Digital Marketing Recap



## BLUFFTON

### CONVERSION RATE OVERVIEW

- With the launch of the Visit Bluffton website in May 2021, our conversion rate is an average between /bluffton conversions and visitbluffton.org conversions. From January - March 2021 we averaged a 10.18% conversion rate, and from April - December 2021 we averaged a 20.1%.
- In 2022, the majority of conversions were Outgoing Partner Links (96%).
- 2022 was the first year being able to report on consolidated data, and the results were very strong.



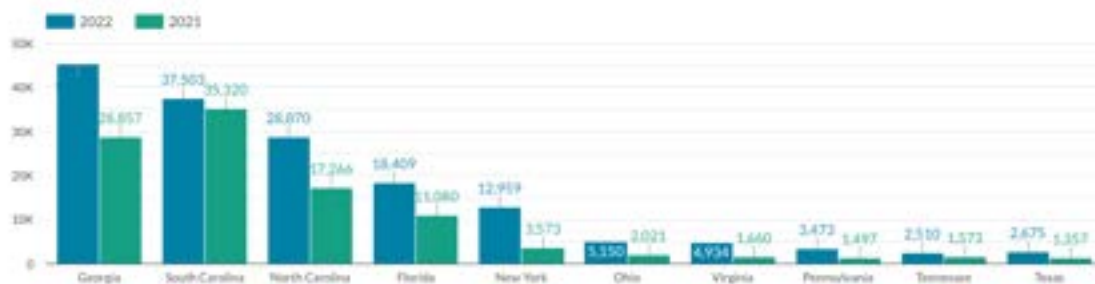
### Bluffton Web Overview

## BLUFFTON

### DMA's

- In 2022, the top regions stayed in line with what we saw in 2021. However 2022 saw a very large increase Georgia traffic taking over the top spot. We saw roughly similar representation from South Carolina with the largest increase coming from the New York Region.

### Top 10 Markets

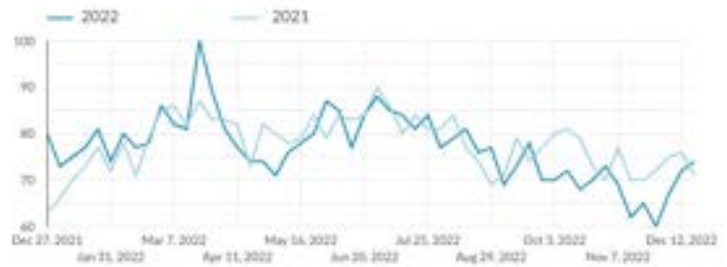
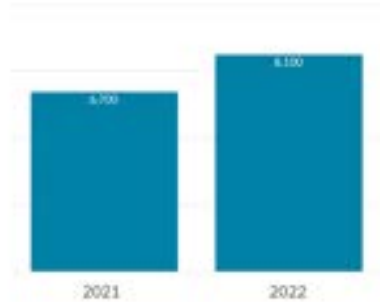


### Bluffton Web Overview

## BLUFFTON

### SEARCH INTEREST

- In 2022, average monthly search volume saw a 21% increase for "Bluffton" vs PY. Outside of South Carolina, the top Brand interest markets were Indiana, Ohio, and Georgia which replaced North Carolina, Connecticut, and Delaware as the second, third and fourth-highest search interest markets.
- Top terms used to search for Bluffton were Bluffton SC, Bluffton South Carolina, things to do in Bluffton SC, Bluffton events, Bluffton Arts and Seafood Festival, Bluffton South Carolina upcoming events, Bluffton, Bluffton SC events, Bluffton restaurants, Bluffton library, hotels in Bluffton and things to do Bluffton SC.



### Bluffton Web Overview



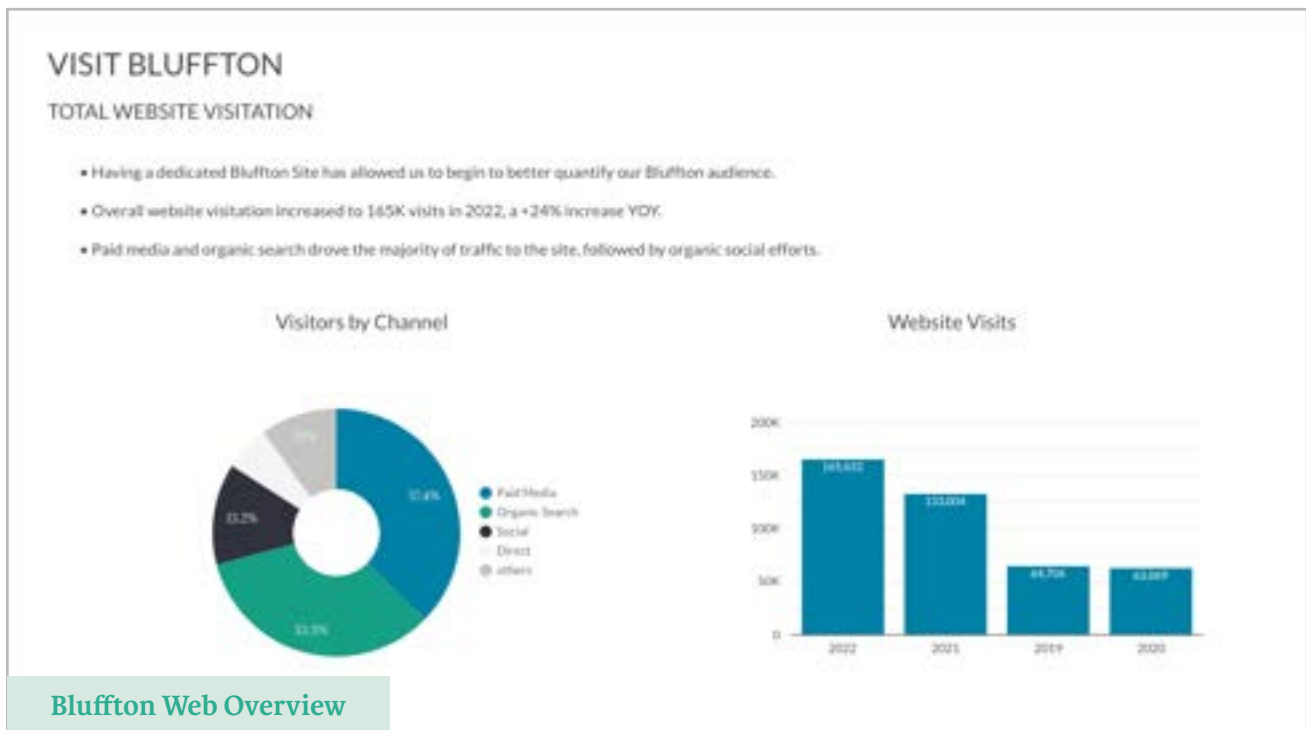
### Bluffton Web Overview



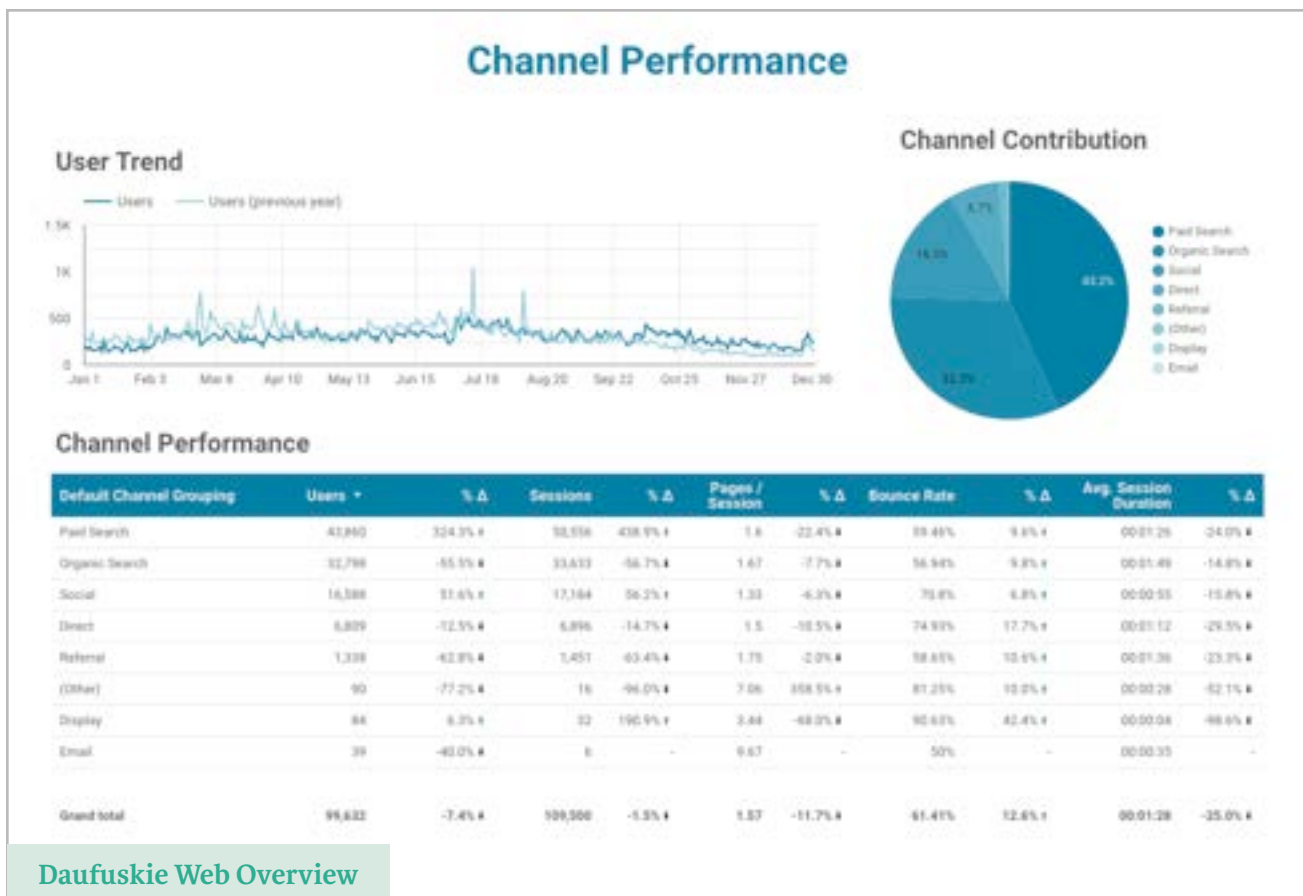


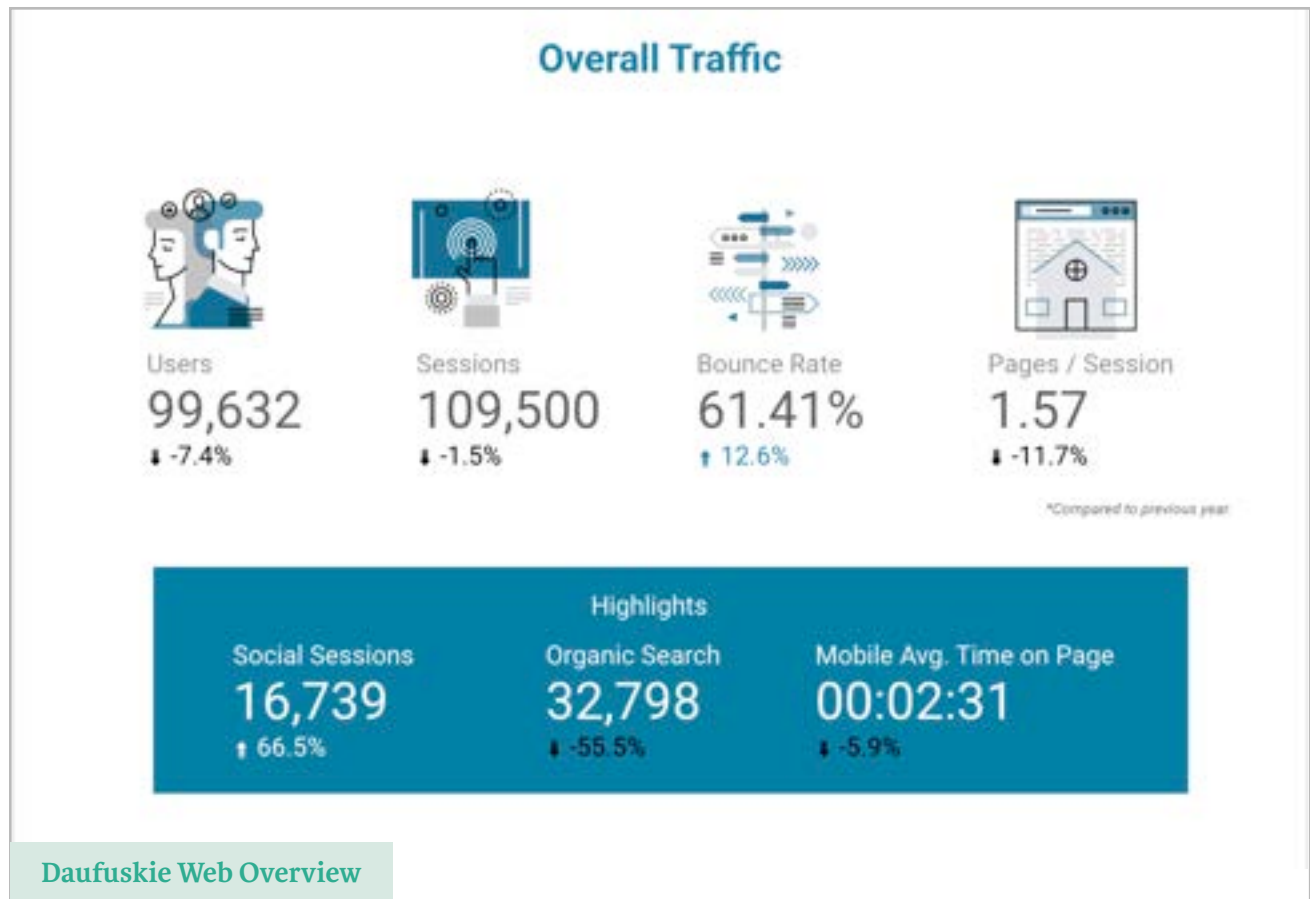


## Bluffton Web Overview



## Bluffton Web Overview







## Page Performance

### Most Popular Pages

Page	Pageviews	% Δ	Unique Pageviews	% Δ	Avg. Time on Page	% Δ	Bounce Rate	% Δ
/daufuskie	50,318	-40.0% ↓	44,928	-39.8% ↓	00:02:04	3.9% ↑	65.06%	21.3% ↑
/daufuskie/getting-here	15,418	-36.2% ↓	13,648	-35.0% ↓	00:04:45	0.3% ↑	64.48%	8.2% ↑
/daufuskie/see-do	14,894	31.3% ↑	12,941	45.8% ↑	00:01:26	-1.7% ↓	66.11%	39.2% ↑
/daufuskie/stay	12,692	-40.7% ↓	10,797	-37.8% ↓	00:02:01	20.5% ↑	63.71%	21.9% ↑
/daufuskie/food-drink	8,417	-29.6% ↓	7,337	-27.4% ↓	00:02:04	-5.0% ↓	71.21%	26.0% ↑
/daufuskie/see-do/adventures	4,541	3.1% ↑	4,218	4.8% ↑	00:02:48	0.4% ↓	65.78%	17.4% ↑
/daufuskie/see-do/history-culture	4,459	-5.9% ↓	4,132	-8.9% ↓	00:04:18	1.1% ↑	79.67%	7.4% ↑
/daufuskie/real-estate	3,301	-31.7% ↓	2,815	-30.5% ↓	00:00:58	0.1% ↑	68.13%	11.5% ↑
/daufuskie/see-do/golf	2,731	-2.9% ↓	2,356	-4.1% ↓	00:02:46	4.2% ↑	61.1%	2.7% ↑
/daufuskie/picture-yourself-daufuskie-island	2,526	-15.6% ↓	2,405	-15.2% ↓	00:01:02	5.5% ↑	79.68%	8.4% ↑
/daufuskie/about	2,454	-42.5% ↓	2,180	-41.4% ↓	00:02:08	2.5% ↑	71.05%	2.7% ↑
/daufuskie/see-do/shopping-antiques	2,363	10.5% ↑	2,145	12.0% ↑	00:01:30	-9.4% ↓	56.57%	24.6% ↑
/daufuskie/see-do/art-galleries-studios	1,563	-0.1% ↓	1,412	2.0% ↑	00:01:28	3.2% ↑	62.56%	5.5% ↑
/see-do/south-carolina-tours/daufuskie-island	1,150	-2.4% ↓	1,061	-1.8% ↓	00:03:10	-12.7% ↓	51.72%	32.4% ↑
/daufuskie/become-explorer	877	-5.2% ↓	491	-2.6% ↓	00:01:32	-0.5% ↓	62.31%	43.6% ↑
/food-drink/daufuskie-difference	503	-28.8% ↓	478	-27.4% ↓	00:02:44	-2.1% ↓	51.76%	25.8% ↑
/see-do/family-vacation/daufuskie-island-is-ideal	426	-36.5% ↓	409	-36.0% ↓	00:02:23	5.0% ↑	30.56%	47.7% ↑
/daufuskie-island-history-antiques-extension	389	-34.5% ↓	333	-33.9% ↓	00:02:19	28.0% ↑	65.63%	14.8% ↑
/stay/daufuskie-rental-group	333	-72.3% ↓	312	-71.9% ↓	00:02:37	-17.0% ↓	58.18%	13.8% ↑
/daufuskie/advertising_campaigns/960583625...	327	-	327	-	00:00:53	-	99.69%	-
<b>Grand Total</b>	<b>172,222</b>	<b>-13.0% ↓</b>	<b>154,375</b>	<b>-10.6% ↓</b>	<b>00:02:19</b>	<b>1.6% ↑</b>	<b>61.41%</b>	<b>12.6% ↑</b>

1 - 100 / 34729

### Daufuskie Web Overview

# 2022 Public Relations Recap

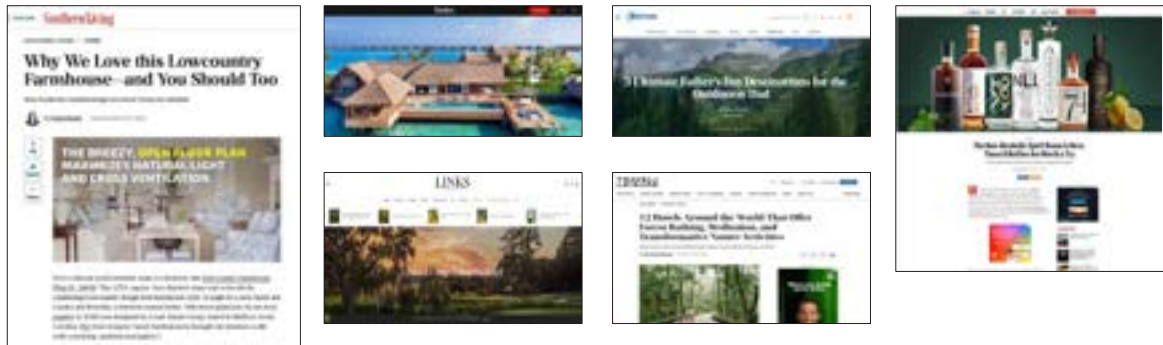


## BLUFFTON COVERAGE HIGHLIGHTS





## BLUFFTON COVERAGE HIGHLIGHTS



## BY THE NUMBERS

In 2022, Bluffton inspired travel to the Lowcountry through a variety of top-tier media coverage which showcased the town's idyllic shoulder season, trendy culinary scene and luxe offerings that appealed to domestic vacation seekers.

### BLUFFTON ANNUAL REPORT 2022

TOTAL MENTIONS:

**148**

TOTAL IMPRESSIONS:

**540,978,585**

TOTAL AD VALUE:

**\$397,854.66**

ESTIMATED TOTAL IMPACT OF TOURISM ON

# Beaufort County

SOUTH CAROLINA 2022



**MARCH 2023**

CONDUCTED BY:  
DANIEL GUTTENTAG, PH.D.  
MELINDA PATIENCE



**COLLEGE of  
CHARLESTON**

SCHOOL OF BUSINESS

**OFFICE OF TOURISM ANALYSIS**

66 GEORGE STREET | CHARLESTON, SC 29424  
OTA.COFC.EDU

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## *Impact of Tourism on Beaufort County, 2022*

### Introduction

This study estimates the economic impact generated by tourism to Beaufort County in the year 2022. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and takes into account the direct spending of the visitors along with the positive secondary effects of such expenditures. The analysis entailed estimating the economic impacts associated with various destinations within the county and then summing them together for an overall total. This report provides individual figures for Beaufort, Bluffton, and Hilton Head Island; figures for the unincorporated parts of the county are not reported separately, but are included in the county total.

This analysis was conducted by Dr. Daniel Guttentag and Melinda Patience of the Office of Tourism Analysis, which is part of the Hospitality and Tourism Management Department in the School of Business at the College of Charleston.

### Methodology

The economic impact estimations undertaken for this analysis involved various steps and diverse data. Initially, visitor volume estimates for each destination were produced using data on lodging demand, as provided by various third-party entities (e.g., STR and Key Data), combined with visitor behavior data that is collected via a Visitor Profile Survey. The estimated total number of visitors in each destination for 2022 can be observed in Table 1. For the purposes of this analysis, overnight visitors who took a day trip to another one of the three destinations were counted both times. The visitor volume estimates then were used to estimate the total direct visitor spending associated with each destination.

Such spending estimates also relied upon visitor expenditure data collected as part of the previously mentioned Visitor Profile Survey, which asks respondents about their spending in over a dozen categories (e.g., lodging, food, transportation, and activities). The list of expenditure categories, and the total estimated direct expenditure in each category for 2022, can be observed in Table 2.

The previously described data subsequently were used to determine average per-person expenditures. These figures were combined with the estimated visitor counts and used as inputs for a regional economic impact modelling tool, IMPLAN. IMPLAN is an input-output (I-O) model that uses regionalized economic data and other information to determine economic output that accounts for direct expenditure and the secondary benefits of such expenditure (i.e., indirect and induced impacts). The model further estimates labor impacts and tax revenues.

The following metrics, as estimated by the economic impact model, are covered within this report:

- **Employment:** The number of jobs in the region supported by the economic activity, which involves an industry-specific mix of full-time, part-time, and seasonal employment. Seasonal jobs are adjusted to annual equivalents.
- **Labor income:** All forms of employment income, including employee compensation (wages and benefits) and proprietor income.
- **Output:** The total value of industry production, which for the service sector represents total sales, for the retail sector represents gross margins, and for the manufacturing sector represents sales minus inventory change.

*Impact of Tourism on Beaufort County, 2022***Table 1. Number of Beaufort County Visitors**

Destination	Overnight	Day Trip	Total
Beaufort	197,652	180,838	<b>378,490</b>
Bluffton	154,478	277,083	<b>431,561</b>
Hilton Head Island	2,825,263	264,083	<b>3,089,346</b>
<b>Beaufort County</b>	<b>3,207,231</b>	<b>722,004</b>	<b>3,929,235</b>

**Table 2. 2022 Estimated Total Expenditure by Spending Category**

	Beaufort	Bluffton	Hilton Head	Beaufort County
Transportation	\$9,248,878	\$12,656,658	\$150,636,976	\$173,661,631
Lodging	\$21,415,130	\$24,613,718	\$891,847,254	\$941,108,978
Food - Dining	\$21,698,493	\$30,615,172	\$464,961,846	\$519,774,982
Food - Grocery	\$8,715,457	\$12,810,826	\$216,635,427	\$239,095,378
Shopping	\$23,346,931	\$34,136,810	\$298,626,091	\$358,635,658
Spas	\$3,776,023	\$5,734,012	\$36,068,371	\$45,957,809
Golf	\$3,238,989	\$4,903,170	\$63,498,893	\$71,968,593
Biking	\$1,038,635	\$1,429,847	\$29,473,412	\$32,066,404
Performance/Visual Arts	\$3,573,239	\$5,720,159	\$27,283,069	\$36,895,278
Festivals	\$2,832,556	\$4,160,605	\$23,249,282	\$30,546,293
Museums/Historical Tours	\$4,299,846	\$7,342,227	\$27,797,593	\$39,760,551
Boating/Sailing/Fishing	\$4,541,509	\$6,715,010	\$50,851,756	\$62,589,400
Nature-based Activities	\$1,542,809	\$1,891,285	\$20,379,190	\$24,030,047
Dolphin Tours	\$1,662,211	\$2,107,214	\$28,813,926	\$32,807,377
Tennis	\$726,597	\$835,123	\$15,367,000	\$17,038,408
Other Expenses	\$6,465,665	\$7,667,465	\$115,673,977	\$130,750,894
<b>Total Expenditure</b>	<b>\$118,122,967</b>	<b>\$163,339,299</b>	<b>\$2,461,164,060</b>	<b>\$2,756,687,681</b>

- **Direct:** The initial effects to local industries that are directly receiving the expenditures of interest.
- **Indirect:** The secondary effects resulting from business-to-business purchases in the supply chain occurring throughout the region, as triggered by or in support of the direct expenditure activity.
- **Induced:** The ripple effects in the region resulting from household spending of income, after the removal of taxes, savings, and commuters.
- **Taxes:** These revenues take into account a variety of taxes, including sales tax, property tax, and income tax. These figures do not account for tourism taxes, such as accommodation taxes.

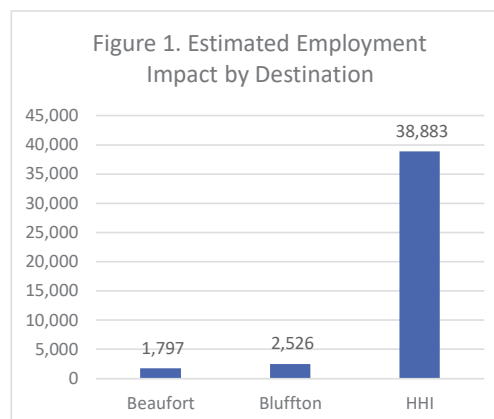
### *Impact of Tourism on Beaufort County, 2022*

## Results

Following two years of travel behavior being largely shaped by the pandemic, in 2022 travel returned to much more traditional patterns. In particular, urban and international travel, together with business and group travel, rebounded considerably, after previously lagging behind in the travel recovery. As a result, the spike in visitation experienced by many non-urban destinations in 2021, precipitated by the increased appeal of outdoor recreation, did not continue. This shift in travel behavior inevitably impacted tourism visitation to Beaufort County. Nonetheless, the estimated number of visitors in 2022 remained just shy of the record-breaking number set in 2021. Moreover, despite the slight decline in visitor volume, an increase in expenditures led to a record-breaking overall economic impact.

A total of **3.93 million visitors** came to Beaufort County in 2022, down 3.0% compared to 2021. The overall economic impact of this tourism on Beaufort County was **\$3.54 billion**, up 12.7% compared to 2021. This economic impact represents not just the direct expenditure by visitors, but also the secondary ripple effects of such economic activity that occur as tourism businesses spend operating funds and as tourism dollars are re-spent within the region. Beaufort County tourism also supported an estimated **43,206 jobs**, which represent 37.1% of all jobs in Beaufort County, as per employment data provided by the Bureau of Economic Analysis. Similar to the economic impact figure, this employment figure does not refer solely to jobs within the tourism sector, but rather to a combination of full-time, part-time, and seasonal jobs that are both directly and indirectly supported by the broader tourism economy and its secondary effects on non-tourism industries and enterprises. Impact estimates for each of the destinations are presented in the Appendix (Tables A1 - A4), and

the employment impacts are presented in Figure 1.



A total output multiplier for tourist spending was calculated using the model estimates. This multiplier represents the ratio of total economic impact to direct spending. The estimated output multiplier for tourism on Beaufort County was **1.28**. This signifies that every dollar spent by tourists in Beaufort County increased output in the overall Beaufort County economy by a total of \$1.28.

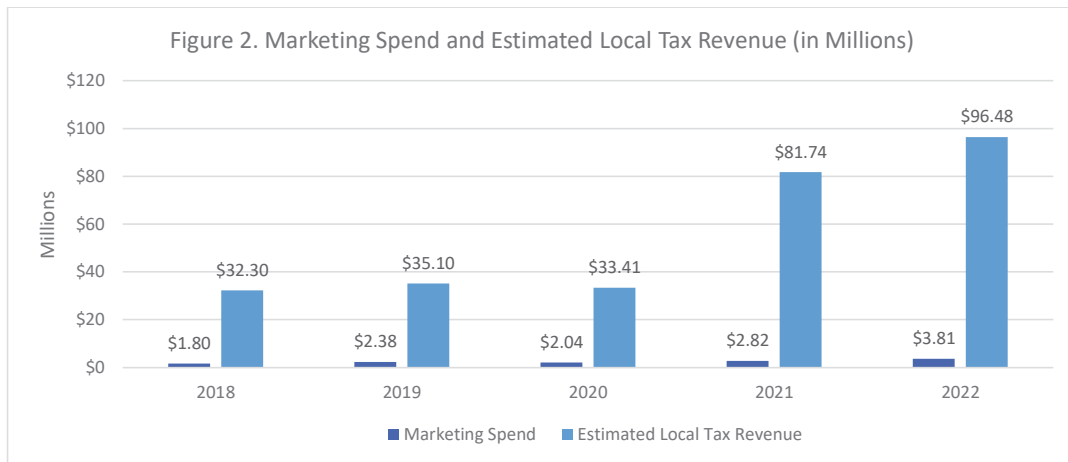
The tourist expenditures generated an estimated **\$41.92 million** in tax revenues for local Beaufort County governments. As reported by their local governments, Hilton Head Island earned an additional **\$44.55 million** in accommodations tax, hospitality tax, and beach preservation fees; Bluffton earned an additional **\$6.51 million** in accommodations tax and hospitality tax; and Beaufort earned an additional **\$3.51 million** in accommodations tax and hospitality tax. Together, this **\$96.48 million** in tax revenue represents an increase of \$14.75 million (18.0%) over 2021. This tax revenue also corresponds with a Return on Tax Investment (ROTI) of 25.33, based on the \$3.81 million that was spent on destination marketing in 2022. In other words, each dollar spent by



*Impact of Tourism on Beaufort County, 2022*

the Visitor & Convention Bureau yielded an estimated return of **\$25.33** in local tax revenue. The comparative relationship over the past five years between destination marketing

expenditure and the estimated local tax revenues generated from tourism can be seen in Figure 2.



*Impact of Tourism on Beaufort County, 2022*

## Appendix

**Table A1. Beaufort – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	1,449	\$37,804,722	\$95,172,827
<b>Indirect</b>	206.36	\$10,017,615	\$31,531,942
<b>Induced</b>	141.52	\$6,518,394	\$22,191,287
<b>Total</b>	<b>1,797</b>	<b>\$54,340,732</b>	<b>\$148,896,055</b>
<b>Estimated Local Tax Revenue</b>			\$1,760,470
<b>Local Tourism Tax Revenue (ATax and HTax)</b>			\$3,511,791
<b>Total Estimated Local Tax Revenue</b>			<b>\$5,272,261</b>

**Table A2. Bluffton – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	2,039	\$52,972,790	\$131,524,491
<b>Indirect</b>	288.53	\$13,926,436	\$44,220,970
<b>Induced</b>	198.1	\$9,123,774	\$31,061,477
<b>Total</b>	<b>2,526</b>	<b>\$76,023,001</b>	<b>\$206,806,938</b>
<b>Estimated Local Tax Revenue</b>			\$2,296,590
<b>Local Tourism Tax Revenue (ATax and HTax)</b>			\$6,507,390
<b>Total Estimated Local Tax Revenue</b>			<b>\$8,803,980</b>

**Table A3. Hilton Head Island – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	31,565	\$982,241,351	\$2,065,296,812
<b>Indirect</b>	3,867	\$188,604,001	\$576,847,176
<b>Induced</b>	3,451	\$158,999,771	\$541,249,066
<b>Total</b>	<b>38,883</b>	<b>\$1,329,845,122</b>	<b>\$3,183,393,054</b>
<b>Estimated Local Tax Revenue</b>			\$37,858,704
<b>Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)</b>			\$44,547,543
<b>Total Estimated Local Tax Revenue</b>			<b>\$82,406,247</b>

*Impact of Tourism on Beaufort County, 2022***Table A4. Beaufort County, All Destinations – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	35,053	1,073,018,863	2,291,994,130
<b>Indirect</b>	4,362	\$212,548,052	\$652,600,087
<b>Induced</b>	3,791	\$174,641,939	\$594,501,830
<b>Total</b>	<b>43,206</b>	<b>\$1,460,208,855</b>	<b>\$3,539,096,047</b>
<b>Estimated Local Tax Revenue</b>			\$41,915,764
<b>Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)</b>			\$54,566,724
<b>Total Estimated Local Tax Revenue</b>			<b>\$96,482,487</b>



*Impact of Tourism on Beaufort County, 2022***Table A5. Top 50 Industries Impacted by Beaufort County Tourism**

	Industry	Output
1	Non-hotel accommodations	\$687,381,483
2	Full-service restaurants	\$546,982,480
3	Hotels and motels, including casino hotels	\$250,537,162
4	Miscellaneous store retailers	\$198,701,629
5	Transit and ground passenger transportation	\$173,411,404
6	Other real estate	\$163,318,465
7	Fitness and recreational sports centers	\$122,762,844
8	Owner-occupied dwellings	\$118,537,553
9	Food and beverage stores	\$96,313,550
10	Management of companies and enterprises	\$71,630,850
11	Museums, historical sites, zoos, and parks	\$63,525,051
12	Water transportation	\$62,338,828
13	Personal care services	\$47,100,854
14	Scenic and sightseeing transportation and support activities for transportation	\$40,969,142
15	Performing arts companies	\$39,190,858
16	All other food and drinking places	\$35,777,060
17	Other amusement and recreation industries	\$33,435,964
18	Insurance agencies, brokerages, and related activities	\$29,703,852
19	Other local government enterprises	\$29,643,450
20	Services to buildings	\$27,967,206
21	Legal services	\$26,572,823
22	Employment services	\$26,467,217
23	Monetary authorities and depository credit intermediation	\$25,509,295
24	Limited-service restaurants	\$25,280,923
25	Offices of physicians	\$23,882,176
26	Securities and commodity contracts intermediation and brokerage	\$22,284,362
27	Nondepository credit intermediation and related activities	\$19,609,236
28	Other financial investment activities	\$18,381,423
29	Management consulting services	\$18,185,019
30	Maintenance and repair construction of nonresidential structures	\$16,347,377
31	Accounting, tax preparation, bookkeeping, and payroll services	\$16,151,974
32	Advertising, public relations, and related services	\$16,033,113
33	General merchandise stores	\$14,975,620
34	Tenant-occupied housing	\$14,521,661
35	Automotive repair and maintenance, except car washes	\$14,228,102
36	Landscape and horticultural services	\$13,631,759
37	Nonstore retailers	\$13,404,871
38	Postal service	\$13,008,669
39	Hospitals	\$11,312,184
40	Gasoline stores	\$10,563,408

*Impact of Tourism on Beaufort County, 2022*

	Industry	Output
41	Radio and television broadcasting	\$10,076,872
42	Car washes	\$10,024,950
43	Electric power transmission and distribution	\$9,530,797
44	Waste management and remediation services	\$9,046,016
45	Building material and garden equipment and supplies stores	\$9,015,232
46	Funds, trusts, and other financial vehicles	\$8,664,361
47	Marketing research and all other miscellaneous professional, scientific, and technical services	\$7,550,674
48	Warehousing and storage	\$7,387,359
49	Clothing and clothing accessories stores	\$7,220,177
50	Offices of dentists	\$6,393,265

*Impact of Tourism on Beaufort County, 2022***Table A5. Top 50 Industries Impacted by Beaufort County Tourism**

	Industry	Output
1	Non-hotel accommodations	\$687,381,483
2	Full-service restaurants	\$546,982,480
3	Hotels and motels, including casino hotels	\$250,537,162
4	Miscellaneous store retailers	\$198,701,629
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38	Postal service	\$13,008,669
39	Hospitals	\$11,312,184
40	Gasoline stores	\$10,563,408





ESTIMATED TOTAL IMPACT OF TOURISM IN

# Bluffton

ON BEAUFORT COUNTY, SOUTH CAROLINA 2022



MARCH 2023

CONDUCTED BY:

DANIEL GUTTENTAG, PH.D.  
MELINDA PATIENCE



COLLEGE of  
CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

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*Impact of Tourism in Bluffton on Beaufort County, 2022*

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### *Impact of Tourism in Bluffton on Beaufort County, 2022*

## Introduction

This study estimates the economic impact generated by tourism to the Town of Bluffton in the year 2022. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and takes into account the direct spending of the visitors along with the positive secondary effects of such expenditures. The analysis entailed individually estimating the economic impacts associated with overnight visitors and day trip visitors, and then summing them together for an overall total.

This analysis was conducted by Dr. Daniel Guttentag and Melinda Patience of the Office of Tourism Analysis, which is part of the Hospitality and Tourism Management Department in the School of Business at the College of Charleston.

## Methodology

The economic impact estimations undertaken for this analysis involved various steps and diverse data. Initially, visitor volume estimates were produced using data on lodging demand provided by STR, combined with visitor behavior data that is collected via a Visitor Profile Survey. The total number of visitors in each segment for 2022 can be observed in Table 1. These figures then were used to estimate the total direct visitor spending associated with each segment. Such spending estimates also relied upon visitor expenditure data collected as part of the previously mentioned Visitor Profile Survey, which asks respondents about their spending in over a

dozen categories (e.g., lodging, food, transportation, and activities). The list of expenditure categories, and the total estimated direct expenditure in each category for 2022, can be observed in Table 2.

The previously described data subsequently were used to determine average per-person expenditures. These figures were combined with the estimated visitor counts and used as inputs for a regional economic impact modelling tool, IMPLAN. IMPLAN is an input-output (I-O) model that uses regionalized economic data and other information to determine economic output that accounts for direct expenditure and the secondary benefits of such expenditure (i.e., indirect and induced impacts). The model further estimates labor impacts and tax revenues.

**Table 1. Number of Bluffton Visitors**

Segment	Visitors
Overnight	154,478
Day Trip	277,083
<b>Total Visitors</b>	<b>431,561</b>

The following metrics, as estimated by the economic impact model, are covered within this report:

- **Employment:** The number of jobs in the region supported by the economic activity, which involves an industry-specific mix of full-time, part-time, and seasonal employment. Seasonal jobs are adjusted to annual equivalents.

*Impact of Tourism in Bluffton on Beaufort County, 2022***Table 2. 2021 Estimated Total Expenditure by Spending Category**

Category	Totals
Transportation (around the destination)	\$12,656,658
Lodging	\$24,613,718
Food – Dining Out	\$30,615,172
Food – Groceries	\$12,810,826
Shopping	\$34,136,810
Spas	\$5,734,012
Golf	\$4,903,170
Biking	\$1,429,847
Performance/Visual Arts	\$5,720,159
Festivals	\$4,160,605
Museums/Historical Tours	\$7,342,227
Boating/Sailing/Fishing	\$6,715,010
Nature-based Activities	\$1,891,285
Dolphin Tours	\$2,107,214
Tennis	\$835,123
Other Expenses	\$7,667,465
<b>Total Expenditure</b>	<b>\$163,339,299</b>

- **Labor income:** All forms of employment income, including employee compensation (wages and benefits) and proprietor income.
- **Output:** The total value of industry production, which for the service sector represents total sales, for the retail sector represents gross margins, and for the manufacturing sector represents sales minus inventory change.
- **Direct:** The initial effects to local industries that are directly receiving the expenditures of interest.
- **Indirect:** The secondary effects resulting from business-to-business purchases in the supply chain occurring throughout the region, as triggered by or in support of the direct expenditure activity.
- **Induced:** The ripple effects in the region resulting from household spending of income, after the removal of taxes, savings, and commuters.
- **Taxes:** These revenues take into account a variety of taxes, including sales tax, property tax, and income tax. These figures do not account for tourism taxes, such as accommodation taxes.

## Results

Following two years of travel behavior being largely shaped by the pandemic, in 2022 travel returned to much more traditional patterns. In particular, urban and international travel, together with business and group travel, rebounded considerably, after previously lagging behind in the travel recovery. As a result, the spike in visitation experienced by many non-urban destinations in 2021 did not continue. This shift in travel behavior inevitably impacted tourism visitation to Bluffton.

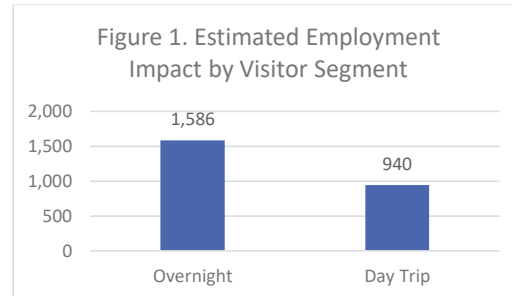
### *Impact of Tourism in Bluffton on Beaufort County, 2022*

Nonetheless, the estimated number of visitors in 2022 remained just shy of the record-breaking number set in 2021. Moreover, despite the slight decline in visitor volume, an increase in expenditures led to a record-breaking overall economic impact.

A total of **432 thousand visitors** came to Bluffton in 2022, down 10.4% compared to 2021. The overall economic impact of this tourism on Beaufort County was **\$206.81 million**, up 10.4% compared to 2021. This economic impact represents not just the direct expenditure by visitors, but also the secondary ripple effects of such economic activity that occur as tourism businesses spend operating funds and as tourism dollars are re-spent within the region. Bluffton tourism also (directly and indirectly) supported an estimated **2,526 jobs**, which represent 2.2% of all jobs in Beaufort County, as per employment data provided by the Bureau of Economic Analysis. Similar to the economic impact figure, this employment figure does not refer solely to jobs within the tourism sector, but rather to a combination of full-time, part-time, and seasonal jobs that are both directly and indirectly supported by the broader tourism economy and its secondary effects on non-tourism industries and enterprises. Impact estimates for each of the visitor segments are presented in the Appendix (Tables A1 - A3), and the employment impacts are presented in Figure 1.

The total output multiplier for tourist spending was calculated using the model estimates. This multiplier represents the ratio of total

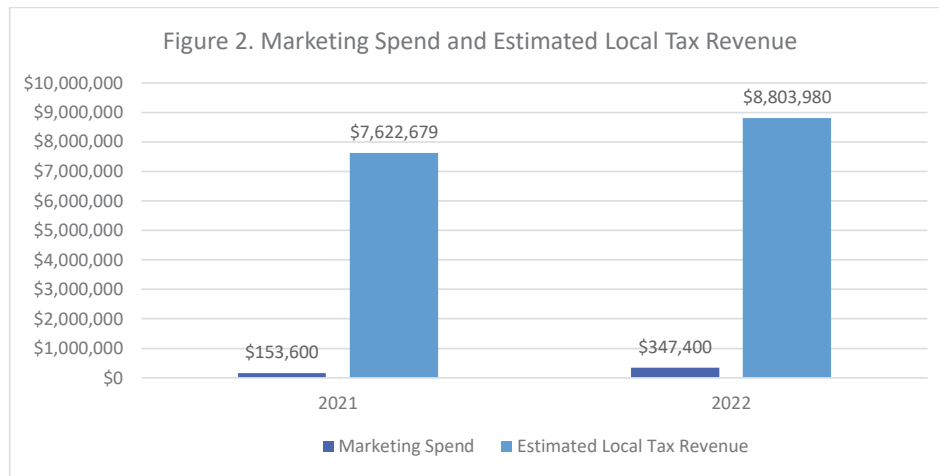
economic impact to direct spending. The estimated output multiplier for Bluffton tourism on Beaufort County was **1.27**. This signifies that every dollar spent by tourists in Bluffton increased output in the overall Beaufort County economy by a total of \$1.27.



The tourist expenditures generated an estimated **\$2.30 million** in tax revenues for local Beaufort County governments. The Town of Bluffton earned an additional **\$6.51 million** in accommodations tax and hospitality tax, as reported by the Town of Bluffton Revenue Services. Together, this **\$8.80 million** in tax revenue represents an increase of \$1.18 million (15.5%) over 2021. This tax revenue also corresponds with a Return on Tax Investment (ROTI) of 25.34, based on the \$347.4 thousand that was spent on destination marketing in 2022. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **\$25.34** in local tax revenue. The comparative relationship over the past two years between destination marketing expenditure and the estimated local tax revenues generated from tourism can be seen in Figure 2.



*Impact of Tourism in Bluffton on Beaufort County, 2022*



*Impact of Tourism in Bluffton on Beaufort County, 2022*

## Appendix

Table A1. Overnight – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
<b>Direct</b>	1,276	\$33,537,638	\$86,339,746
<b>Indirect</b>	184	\$9,001,920	\$27,933,588
<b>Induced</b>	126	\$5,793,002	\$19,721,327
<b>Total</b>	<b>1,586</b>	<b>\$48,332,560</b>	<b>\$133,994,661</b>

Table A2. Day Trip – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
<b>Direct</b>	763	\$19,435,153	\$45,184,745
<b>Indirect</b>	105	\$4,924,516	\$16,287,382
<b>Induced</b>	72	\$3,330,772	\$11,340,150
<b>Total</b>	<b>940</b>	<b>\$27,690,441</b>	<b>\$72,812,276</b>

Table A3. Total, All Segments – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
<b>Direct</b>	2,039	\$52,972,790	\$131,524,491
<b>Indirect</b>	288.53	\$13,926,436	\$44,220,970
<b>Induced</b>	198.1	\$9,123,774	\$31,061,477
<b>Total</b>	<b>2,526</b>	<b>\$76,023,001</b>	<b>\$206,806,938</b>
<b>Estimated Local Tax Revenue</b>			\$2,296,590
<b>Local Tourism Tax Revenue (ATax and HTax)</b>			\$6,507,390
<b>Total Estimated Local Tax Revenue</b>			<b>\$8,803,980</b>

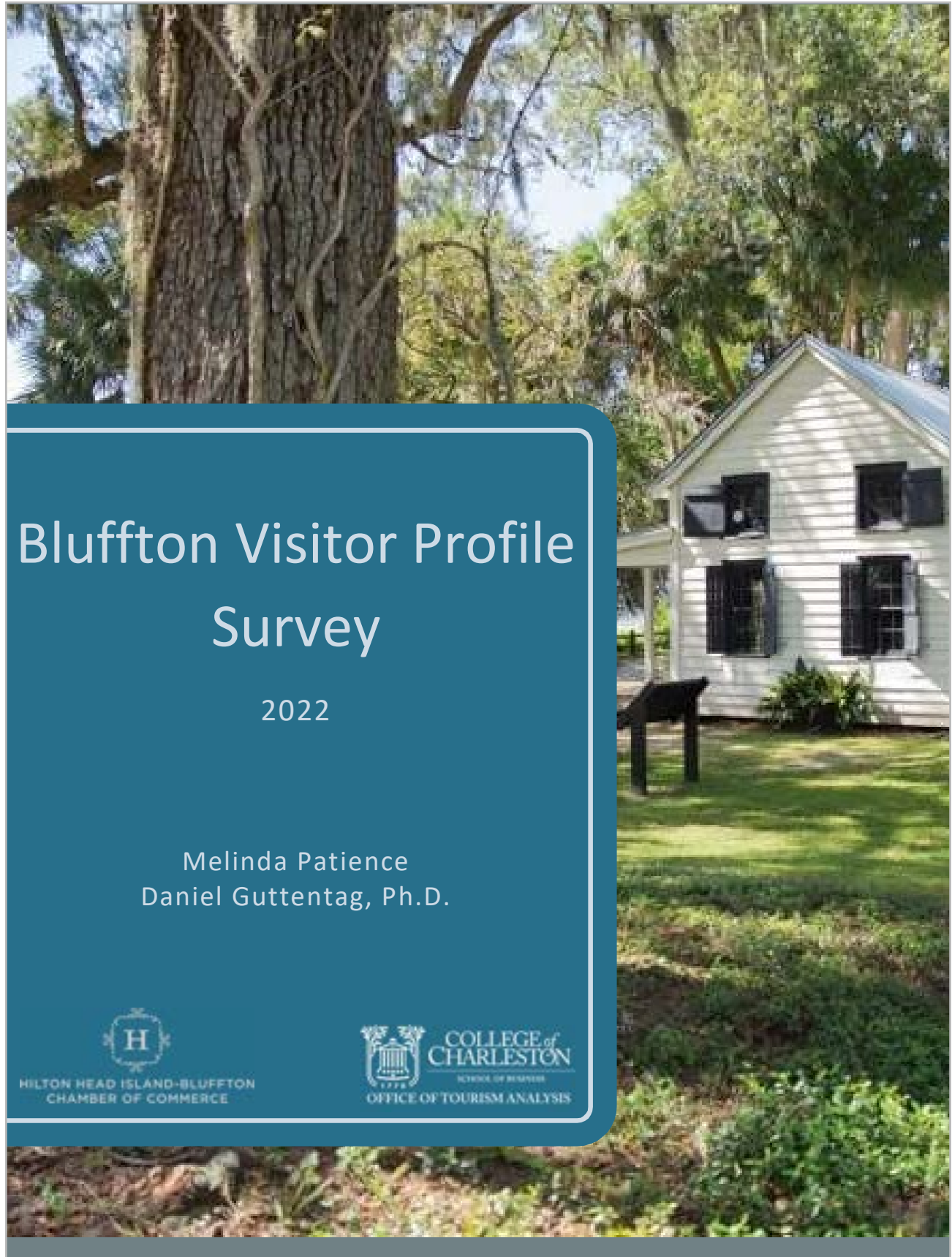
*Impact of Tourism in Bluffton on Beaufort County, 2022***Table A4. Top 50 Industries Impacted by Bluffton Tourism**

	Industry	Output
1	Full-service restaurants	\$32,273,635
2	Hotels and motels, including casino hotels	\$24,616,021
3	Miscellaneous store retailers	\$18,773,939
4	Transit and ground passenger transportation	\$12,710,166
5	Other real estate	\$11,741,424
6	Museums, historical sites, zoos, and parks	\$9,247,745
7	Fitness and recreational sports centers	\$7,281,987
8	Water transportation	\$6,727,782
9	Owner-occupied dwellings	\$6,202,814
10	Performing arts companies	\$5,896,837
11	Personal care services	\$5,820,668
12	Food and beverage stores	\$5,166,142
13	Management of companies and enterprises	\$4,555,133
14	Other amusement and recreation industries	\$4,337,055
15	Scenic and sightseeing transportation and support activities for transportation	\$2,812,944
16	Insurance agencies, brokerages, and related activities	\$2,125,086
17	Other local government enterprises	\$1,799,103
18	Employment services	\$1,718,226
19	Monetary authorities and depository credit intermediation	\$1,703,189
20	Securities and commodity contracts intermediation and brokerage	\$1,625,058
21	Services to buildings	\$1,614,125
22	Legal services	\$1,594,027
23	All other food and drinking places	\$1,506,163
24	Limited-service restaurants	\$1,337,981
25	Offices of physicians	\$1,246,498
26	Nondepository credit intermediation and related activities	\$1,234,510
27	Advertising, public relations, and related services	\$1,172,724
28	Management consulting services	\$1,129,085
29	Other financial investment activities	\$1,071,570
30	Maintenance and repair construction of nonresidential structures	\$991,849
31	Postal service	\$840,477
32	Accounting, tax preparation, bookkeeping, and payroll services	\$836,903
33	Automotive repair and maintenance, except car washes	\$827,151
34	Retail - General merchandise stores	\$793,451
35	Landscape and horticultural services	\$783,275
36	Tenant-occupied housing	\$753,300
37	Nonstore retailers	\$735,118
38	Gasoline stores	\$644,040
39	Car washes	\$596,734

*Impact of Tourism in Bluffton on Beaufort County, 2022*

	Industry	Output
40	Radio and television broadcasting	\$595,675
41	Hospitals	\$589,521
42	Independent artists, writers, and performers	\$582,694
43	Warehousing and storage	\$534,328
44	Building material and garden equipment and supplies stores	\$511,950
45	Electric power transmission and distribution	\$508,783
46	Waste management and remediation services	\$494,310
47	Funds, trusts, and other financial vehicles	\$462,730
48	Marketing research and all other miscellaneous professional, scientific, and technical services	\$461,014
49	Investigation and security services	\$427,419
50	Truck transportation	\$425,460





# Bluffton Visitor Profile Survey

2022

Melinda Patience  
Daniel Guttentag, Ph.D.



BLUFFTON VISITOR PROFILE SURVEY

2022

PREPARED FOR:

HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE

BY:

OFFICE OF TOURISM ANALYSIS  
SCHOOL OF BUSINESS  
COLLEGE OF CHARLESTON

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BLUFFTON VISITOR PROFILE SURVEY

2022

1



## 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
Non-paying Guests	172,349	154,478
Daytrippers	309,137	277,083
Total Visitors	481,486	431,561

Table 1: Visitor Estimates 2022



