



Hilton Head Island Visitor Profile Survey

2024

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TABLE OF CONTENTS

Executive Summary..... 2

Methodology 6

Survey Findings..... 8

 Sample Demographics..... 8

 Sample Point of Origin 9

 Travel to the Hilton Head Island / Bluffton Area 11

 Hilton Head Island Visitors 12

 Travel Planning 24

 Non-Visitors 27

 Travel Behavior – All Respondents 29

Appendix 33



EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Millennials (29-44 years old) represented 39.8% of the respondents, followed by older Gen Z (19-28 years old) (33.6%), Baby Boomers (61+ years old) (14.6%), and then Gen X (45-60 years old) (11.5%). Over 54% of those surveyed had a Bachelor's degree or higher, and more than 62% had an annual household income of \$75,000 or more. Also, nearly 73% of the respondents were married.

POINT OF ORIGIN

The respondents resided in 268 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from the east coast to the west coast. More respondents resided in California than any other state (8.6%). Second was New York (8.0%), followed then by Pennsylvania (5.4%), Kentucky (4.7%), Ohio (4.6%), and Washington (4.3%). In-state visitors represented 8.1% of the respondents.

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ; Los Angeles-Long Beach-Anaheim, CA; Seattle-Tacoma-Bellevue, WA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Lexington-Fayette, KY; Rochester, NY; Atlanta-Sandy Springs-Roswell, GA; Charleston-North Charleston, SC; Chicago-Naperville-Elgin, IL-IN; and Pittsburgh, PA.

Canada was the top international origin market amongst respondents (73.7%), followed by Europe (10.5%) and the British Virgin Islands (10.5%).

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (61.9%), spending time with family (32.1%), and relaxation (31.8%), followed by nature-based activities (22.9%), boating activities (22.5%), biking (17.1%), heritage attractions (13.4%), and business (11.3%). The activities in which visitors actually participated are similar to the previously mentioned activities and also include shopping, culinary experiences, and golf.

Among Hilton Head Island's overnight visitors, 57.2% indicated they had visited Hilton Head Island, SC for the first time, suggesting that the destination continues to appeal to new visitors.

TRIP CHARACTERISTICS

The average group size of those surveyed was 3.6 for overnight visitors and 2.5 for day trip visitors. The main mode of transportation to and around the island continues to be personal/family car (58.3%), followed by various modes of flying into the destination (38.5%). The majority of visitors fly into Savannah/Hilton Head Island International Airport.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.3 nights, hotel visitors stayed 5.7 nights, timeshare visitors stayed 6.7 nights, and second homeowners stayed 9.3 nights. The overall average was 6.6 nights.

Resorts stood out as the most popular choice of paid accommodation for overnight visitors (29.0%), followed by hotels (27.2%), home/villa rentals (23.0%), timeshares (10.2%), and second homes (3.3%).



TRAVEL PLANNING

Local vacation rental companies were by far the most popular online booking platform for villas/homes (33.6%), followed by VRBO (22.6%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (17.1%). The percentage of respondents booking via Airbnb increased slightly from around 10% to 16%.

The Caribbean, Hawaii, Alabama Golf Trail, the Outer Banks, and Gulf Shores were the top competitors for Hilton Head Island as alternative beach destinations. The top competing market was the Caribbean.

The top reasons for choosing to visit Hilton Head Island were wanting to visit a beach destination (52.3%), word-of-mouth/recommendation (40.8%), previous visitation (40.6%), nature-based attractions (39.9%), and wanting to visit heritage attractions (32.6%).

Of those visitors surveyed, 84.1% indicated an intention to return to visit Hilton Head Island, 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=246), 29.7% had never visited the Hilton Head Island / Bluffton area before, and 61.8% had visited one to five times before.

Of those non-visitors, 38.6% traveled elsewhere, 34.2% plan to visit in the future, 11.4% mentioned health reasons, 5.1% 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. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (34.4%) and Northeast (33.1%) were the most popular. Nonetheless, 36.7% 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 (57.8%) 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: beaches (87.1%), relaxation & rejuvenation (85.3%), passive outdoor adventures (76.1%), romantic couple getaways (74.7%), and historic attractions (73.6%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (92.8%), quality of dining options (85.8%), ease of access (85.5%), quality of lodging options (84.9%), diversity of dining options (83.2%), and affordability (80.6%).



METHODOLOGY

The 2024 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2024 and January 2025, 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 1,040 completed surveys were collected. This report is based largely on the 574 respondents who visited Hilton Head Island as an overnight or day trip, along with 246 individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton. The remaining 230 responses were individuals who only visited Bluffton and are covered in a separate report.

This report presents the results of the present study, together with comparative results from the last four times this study was completed, examining visitation in 2019, 2021, 2022 and 2023. When 2019 data is not presented, it is because the question was not asked in that survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2021, 2022, 2023 and 2024. The estimates are based on secondary data for hotel, timeshare, and villa visitors, as well as primary data collected regarding second homeowners, their guests, and day trippers.

Visitor Segment	2021	2022	2023	2024	Change (%) vs 2021	Change (%) vs 2022	Change (%) vs 2023
Villa/Home Rentals	962,686	951,126	920,345	834,495	-13.3%	-12.3%	-9.3%
Hotels/Resorts	508,977	497,574	481,328	453,826	-10.8%	-8.8%	-5.7%
Timeshares	481,934	481,461	477,628	483,070	0.2%	0.3%	1.1%
Second Homeowners	719,302	710,673	674,278	652,215	-9.3%	-8.2%	-3.3%
Non-paying Guests	186,667	184,428	174,983	169,258	-9.3%	-8.2%	-3.3%
Day trippers	267,290	264,083	255,358	242,361	-9.3%	-8.2%	-5.1%
Total Visitors	3,126,856	3,089,346	2,983,919	2,835,224	-9.3%	-8.2%	-5.0%

Table 1: Visitor Estimates for 2021-2024 and Percent Change Comparison



SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021	2022	2023	2024
Gender					
Female	67.4%	62.5%	48.8%	54.1%	49.0%
Male	32.6%	37.4%	51.1%	45.7%	50.7%
Self-identify	-	0.1%	-	0.3%	0.3%
Marital Status					
Married	76.7%	76.7%	77.3%	86.4%	72.7%
Single	8.5%	9.2%	9.9%	6.7%	14.9%
Divorced	7.4%	7.7%	5.8%	3.4%	6.6%
Widowed	3.1%	5.3%	5.9%	2.8%	4.3%
Separated	0.5%	1.1%	1.1%	0.7%	1.5%
Living as Married	3.8%	-	-	-	-
Education (highest level completed)					
Grade School	0.2%	0.7%	0.4%	0.9%	0.6%
High School	8.0%	8.0%	6.5%	3.8%	7.2%
Some College	19.6%	20.9%	21.5%	22.6%	24.0%
Associates Degree (2 years)	13.1%	13.6%	13.2%	16.0%	14.2%
Bachelor's Degree (4 years)	31.5%	32.9%	32.3%	33.0%	35.2%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%	18.8%
Age					
19 years or younger	0.1%	0.1%	0.1%	0.3%	0.6%
20 to 29 years	0.9%	10.5%	23.8%	24.1%	33.0%
30 to 39 years	5.9%	16.5%	28.8%	39.4%	32.1%
40 to 49 years	15.3%	12.6%	13.1%	8.3%	12.1%
50 to 59 years	26.8%	18.7%	10.9%	9.4%	7.1%
60 to 69 years	34.4%	25.8%	14.2%	11.6%	8.6%
70 years and over	15.9%	14.5%	8.6%	6.3%	6.0%
Prefer not to say	0.6%	1.4%	0.3%	0.5%	0.5%
Household Income					
Under \$24,999	1.4%	2.3%	1.5%	1.1%	3.2%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%	5.8%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%	9.9%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%	18.4%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%	21.0%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%	22.0%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%	9.7%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%	5.0%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%	5.0%
Not Applicable	18.8%	-	-	-	-
N	1,682	1,884	1,913	1,154	1,040

Table 2: Demographics

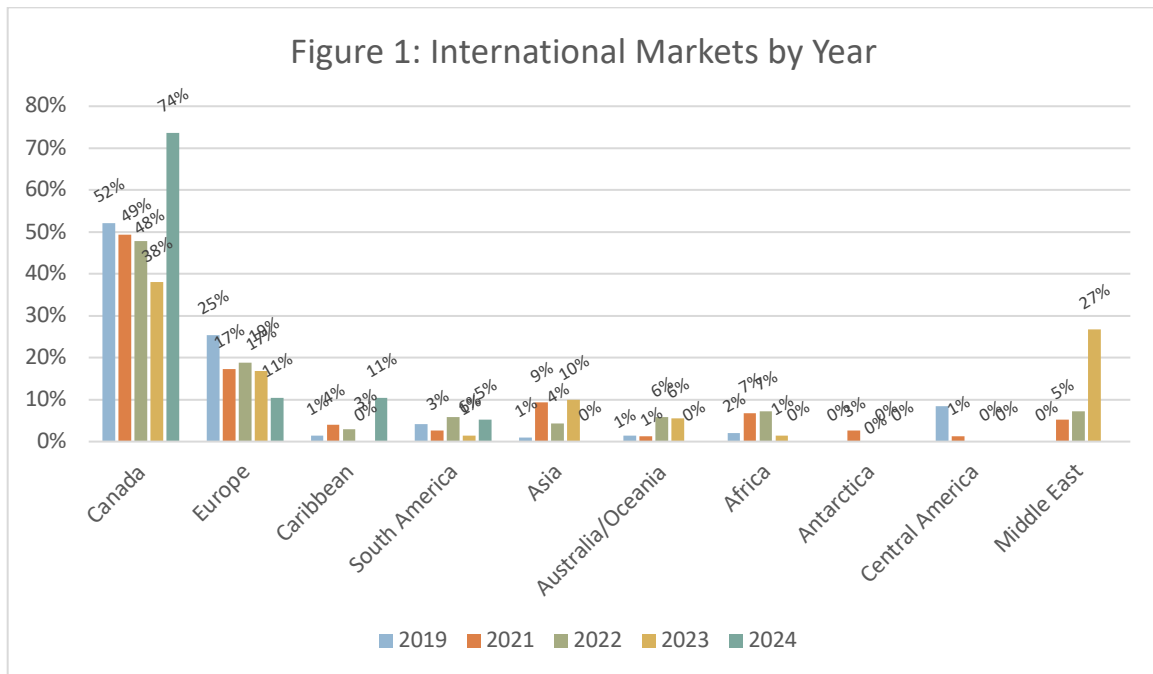
SAMPLE POINT OF ORIGIN

ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	New York-Newark-Jersey City, NY-NJ	73	7.1%
2	Los Angeles-Long Beach-Anaheim, CA	42	4.1%
3	Seattle-Tacoma-Bellevue, WA	38	3.7%
4	Washington-Arlington-Alexandria, DC-VA-MD-WV	33	3.2%
5	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	28	2.7%
6	Lexington-Fayette, KY	27	2.6%
7	Rochester, NY	25	2.4%
8	Atlanta-Sandy Springs-Roswell, GA	22	2.2%
9	Charleston-North Charleston, SC	20	2.0%
10	Chicago-Naperville-Elgin, IL-IN	19	1.9%
11	Pittsburgh, PA	19	1.9%
12	Charlotte-Concord-Gastonia, NC-SC	17	1.7%
13	Dallas-Fort Worth-Arlington, TX	16	1.6%
14	Hilton Head Island-Bluffton-Port Royal, SC	14	1.4%
15	Baltimore-Columbia-Towson, MD	13	1.3%
16	Las Vegas-Henderson-North Las Vegas, NV	13	1.3%
17	Myrtle Beach-Conway-North Myrtle Beach, SC	13	1.3%
18	Louisville/Jefferson County, KY-IN	12	1.2%
19	Cincinnati, OH-KY-IN	11	1.1%
20	Phoenix-Mesa-Chandler, AZ	11	1.1%
21	Boston-Cambridge-Newton, MA-NH	10	1.0%
22	Miami-Fort Lauderdale-West Palm Beach, FL	10	1.0%
23	Rural OH	10	1.0%
24	Columbia, SC	9	0.9%
25	Detroit-Warren-Dearborn, MI	9	0.9%
26	Minneapolis-St. Paul-Bloomington, MN-WI	9	0.9%
27	Columbus, OH	8	0.8%
28	Birmingham, AL	7	0.7%
29	Fresno, CA	7	0.7%
30	Greenville-Anderson-Greer, SC	7	0.7%
	Other	469	45.9%
	Total	1,040	

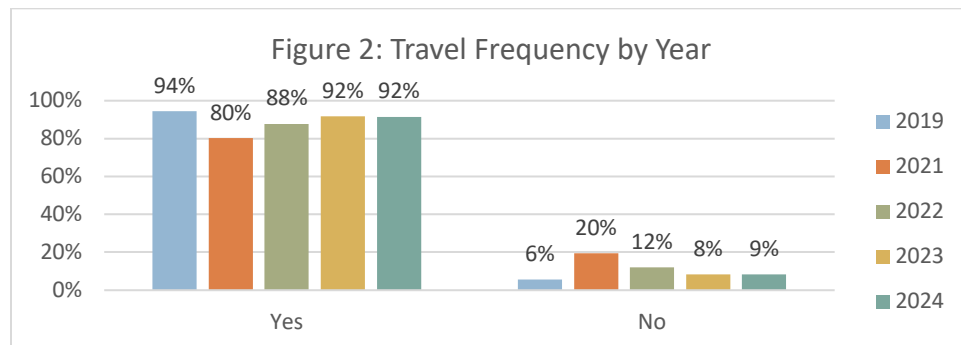
Table 3: ZIP Code Analysis – Top 30 MSAs

International Markets



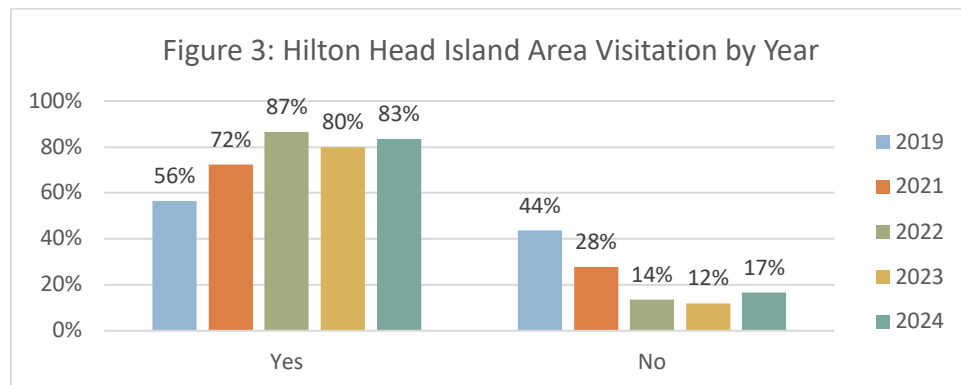
	2019	2021	2022	2023	2024
Canada	52.1%	49.3%	47.8%	38.0%	73.7%
Europe	25.4%	17.3%	18.8%	16.9%	10.5%
Caribbean	1.4%	4.0%	2.9%	-	10.5%
South America	4.2%	2.7%	5.8%	1.4%	5.3%
Asia	1.0%	9.3%	4.3%	9.9%	-
Australia/Oceania	1.4%	1.3%	5.8%	5.6%	-
Africa	2.1%	6.7%	7.2%	1.4%	-
Antarctica	-	2.7%	-	-	-
Central America	8.5%	1.3%	-	-	-
Middle East	-	5.3%	7.2%	26.8%	-
N	71	75	69	71	19

Table 4: International Markets by Year

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA**Within the last 12 months have you traveled or taken a vacation?¹**

	2019	2021	2022	2023	2024
Yes	94.3%	80.4%	87.8%	91.8%	91.5%
No	5.7%	19.6%	12.2%	8.2%	8.5%
N	1,684	2,084	2,918	1,710	1,040

TABLE 5: Travel Frequency by Year

Did you visit Hilton Head Island, SC or Bluffton, SC in the last 12 months?¹

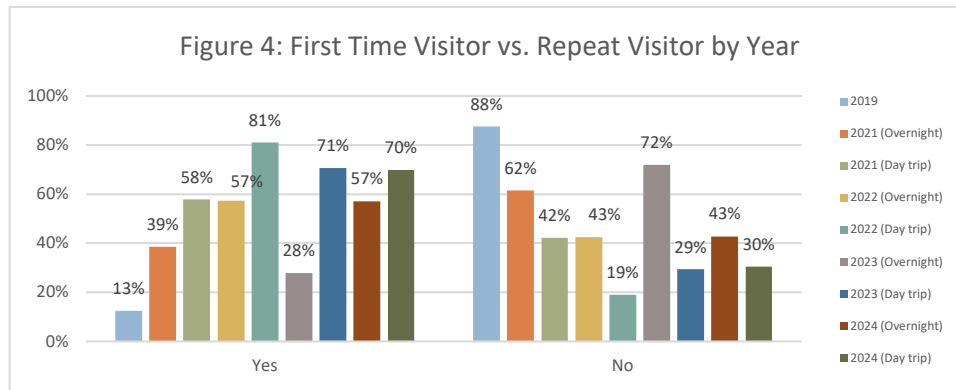
	2019	2021	2022	2023	2024
Yes	56.4%	72.3%	86.5%	79.8%	83.4%
No	43.6%	27.7%	13.5%	12.0%	16.6%
N	1,713	1,675	2,547	1,570	952

TABLE 6: Hilton Head Island Area Visitation by Year

¹ For the 2019 report, these questions asked about the last 18 months instead of the last 12 months. Also, in 2019 the second question was asked of all respondents, whereas in subsequent years it was just asked of those who had travelled.

HILTON HEAD ISLAND VISITORS

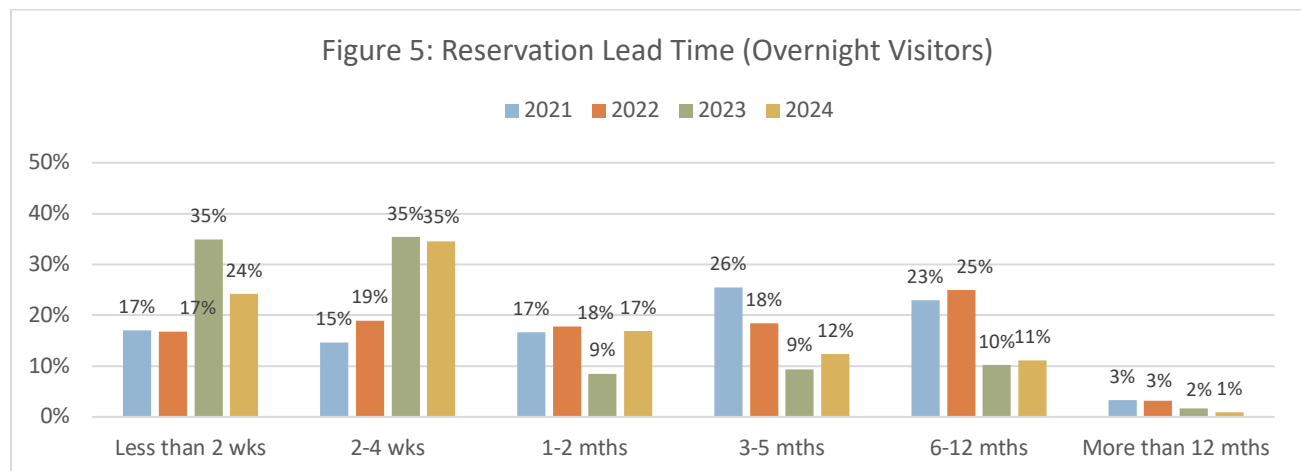
Was that your first time visiting Hilton Head Island?



	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Yes	12.5%	38.5%	57.8%	57.4%	81.0%	28.0%	70.6%	57.2%	69.9%
No	87.5%	61.5%	42.2%	42.6%	19.0%	72.0%	29.4%	42.8%	30.4%
N	946	991	45	1,477	79	1,077	34	547	23

TABLE 7: First Time Visitor vs. Repeat Visitor by Year

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



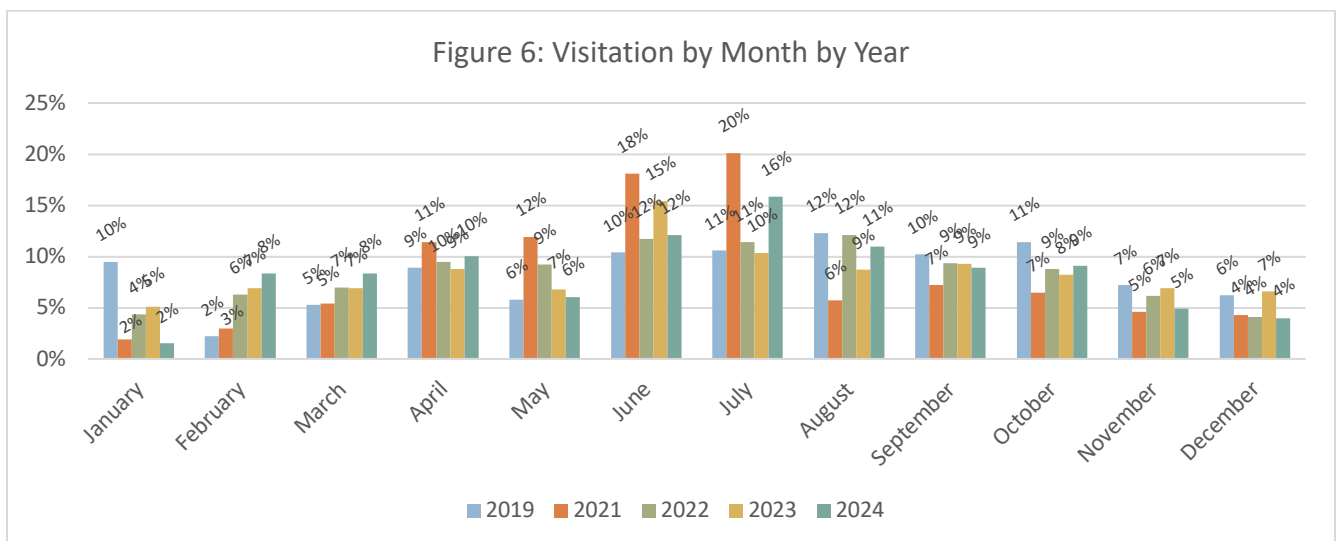
	2021	2022	2023	2024
Less than 2 weeks	17.0%	16.8%	34.9%	24.2%
2 weeks to 4 weeks	14.6%	18.9%	35.4%	34.5%
1 to 2 months	16.6%	17.8%	8.5%	16.9%
3 to 5 months	25.5%	18.4%	9.4%	12.4%
6 to 12 months	22.9%	24.9%	10.2%	11.1%
More than 12 months	3.3%	3.2%	1.6%	0.9%
N	991	1,479	1,076	550

TABLE 8: Reservation Lead Time

When did you make your most recent trip to Hilton Head Island?

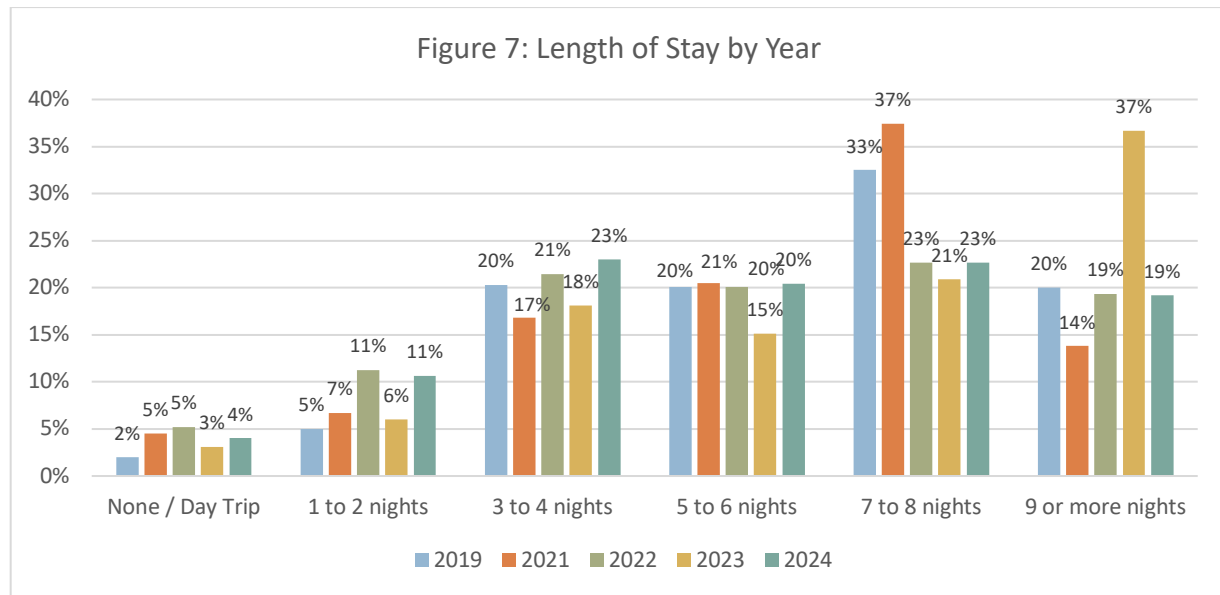
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
January	9.5%	1.9%	-	4.3%	4.3%	5.1%	3.0%	1.5%	-
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	-	8.3%	4.8%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%	8.3%	4.8%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%	10.0%	9.5%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%	6.0%	23.8%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%	12.1%	9.5%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%	15.9%	9.5%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%	11.0%	4.8%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%	8.9%	4.8%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%	9.1%	28.6%
November	7.2%	4.7%	-	6.3%	2.9%	6.9%	-	4.9%	-
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%	4.0%	-
N	951	1,504	34	1,361	70	1,044	33	529	21

TABLE 9: Visitation by Month by Year



Note: For the 2019 survey, data collection occurred exclusively in January/February; for the 2021 survey, data collection occurred on a continuous basis from June onwards; and for the 2022 survey and subsequent surveys, data collection occurred on a continuous basis throughout the year.

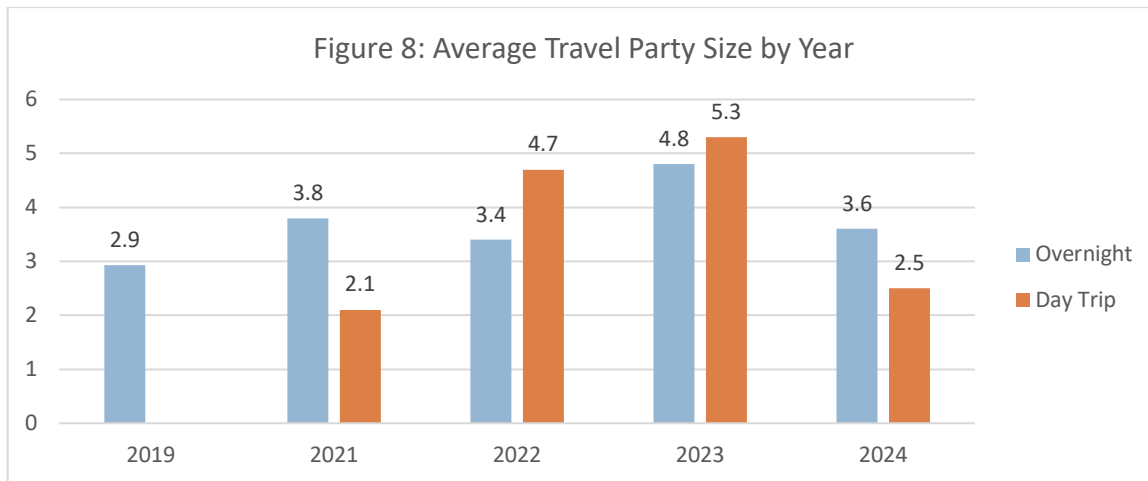
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023	2024
None/day trip only	2.0%	4.5%	5.2%	3.1%	4.0%
1 night	1.9%	1.8%	2.4%	0.4%	1.9%
2 nights	3.1%	4.9%	8.9%	5.6%	8.7%
3 nights	10.3%	7.5%	11.3%	10.2%	11.3%
4 nights	10.0%	9.3%	10.2%	7.9%	11.7%
5 nights	7.7%	9.6%	10.5%	7.5%	11.5%
6 nights	12.4%	10.9%	9.5%	7.6%	8.9%
7 nights	30.4%	34.0%	19.3%	15.4%	19.0%
8 nights	2.1%	3.4%	3.4%	5.5%	3.7%
9 nights	2.3%	2.6%	1.8%	3.7%	3.0%
10 nights	3.4%	3.1%	3.2%	3.7%	5.8%
11 nights	0.5%	0.4%	1.3%	2.6%	1.6%
12 nights	0.8%	0.9%	1.4%	3.7%	1.6%
13 nights	0.6%	0.7%	0.8%	2.9%	1.0%
14 nights	4.8%	4.2%	3.6%	4.4%	3.5%
15 nights	0.5%	0.8%	1.1%	2.9%	0.9%
More than 15 nights	7.1%	1.1%	6.2%	12.8%	1.9%
N	950	996	1,519	1,103	573

TABLE 10: Length of Stay by Year

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



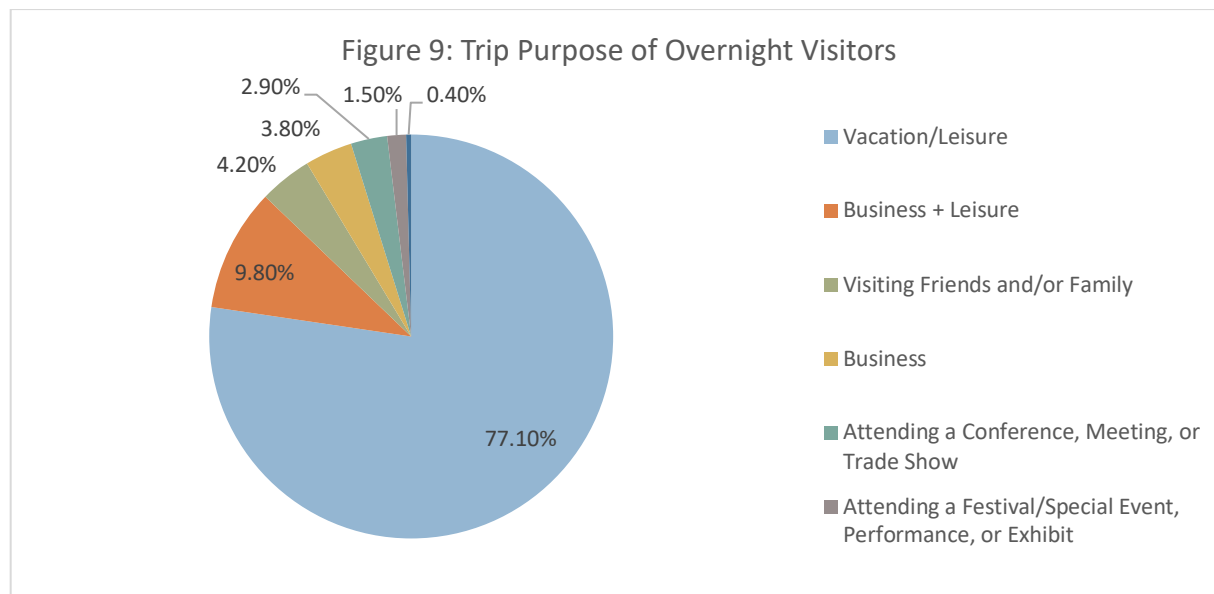
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Average	2.9	3.8	2.1	3.4	4.7	4.8	5.3	3.6	2.5
N	951	995	45	1,477	79	1,042	30	551	23

TABLE 11: Travel Party Size by Year

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	76.4%	12.9%	7.4%	1.3%	0.7%	0.4%	0.9%
	18-24	77.0%	9.8%	6.7%	1.1%	3.4%	0.9%	1.1%
	25-34	59.7%	21.6%	10.7%	4.5%	0.7%	1.5%	1.3%
	35-44	68.8%	10.9%	12.3%	1.8%	1.6%	2.4%	2.2%
	45-54	82.2%	6.5%	7.3%	1.8%	-	1.3%	0.9%
	55-64	81.5%	5.8%	10.5%	0.4%	0.5%	0.4%	0.9%
	65+	87.3%	3.6%	8.2%	0.7%	0.2%	-	-
Day Trip	Under 18	73.9%	17.4%	8.7%	-	-	-	-
	18-24	73.9%	17.4%	8.7%	-	-	-	-
	25-34	56.5%	21.7%	21.7%	-	-	-	-
	35-44	82.6%	-	8.7%	4.3%	4.3%	-	-
	45-54	91.3%	-	8.7%	-	-	-	-
	55-64	95.7%	-	4.3%	-	-	-	-
	65+	87.0%	4.3%	4.3%	4.3%	-	-	-

TABLE 12: Travel Party Ages by Year

What was the main purpose of your overnight visit to Hilton Head Island?

	2021	2022	2023	2024
Vacation/Leisure	82.1%	74.3%	87.1%	77.1%
Business + Leisure	6.7%	6.9%	4.4%	9.8%
Visiting Friends and/or Family	3.9%	5.0%	2.7%	4.2%
Business	2.1%	5.3%	2.5%	3.8%
Attending a Conference, Meeting, or Trade Show	2.3%	4.2%	1.1%	2.9%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%	2.5%	0.7%	1.5%
Other	1.9%	1.7%	1.4%	0.4%
N	995	1,491	1,081	551

TABLE 13: Trip Purpose of Overnight Visitors

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

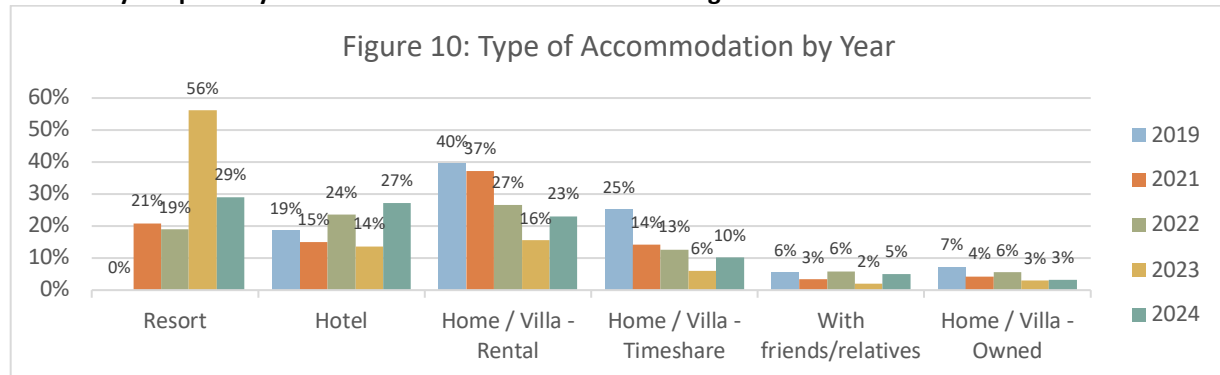
	2021	2022	2023	2024
Part of a vacation	57.8%	72.2%	76.5%	73.9%
Day trip from home	42.2%	27.8%	23.5%	26.1%
N	45	79	34	15

TABLE 14: Day Trip as Part of a Vacation or Day Trip from Home

Where did you stay overnight?

	2021	2022	2023	2024
Charleston	19.2%	50.9%	26.9%	26.7%
Savannah	42.3%	19.3%	23.1%	26.7%
Jacksonville	3.8%	3.5%	11.5%	20.0%
Beaufort	19.2%	14.0%	15.4%	6.7%
Tybee Island	7.7%	10.5%	19.2%	6.7%
Fripp Island	3.8%	-	-	-
Other	3.8%	1.8%	3.8%	13.3%
N	26	57	26	15

TABLE 15: Day Trip Visitors' Overnight Location

Overnight Visitors:**What was your primary form of accommodation while visiting Hilton Head Island?**

	2019	2021	2022	2023	2024
Resort	-	20.9%	19.0%	56.1%	29.0%
Hotel	18.6%	15.0%	23.6%	13.7%	27.2%
Home / Villa - Rental	39.5%	37.2%	26.6%	15.6%	23.0%
Home / Villa - Timeshare	25.2%	14.2%	12.7%	6.1%	10.2%
With friends/relatives	5.6%	3.4%	5.9%	2.0%	5.1%
Home / Villa - Owned	7.1%	4.3%	5.6%	3.0%	3.3%
RV park	1.1%	0.4%	1.5%	0.4%	2.2%
Other	1.4%	0.3%	0.1%	-	-
Resort	-	20.9%	19.0%	56.1%	29.0%
N	951	1,040	1,570	1,115	551

TABLE 16: Types of Accommodation by Year

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

Sonesta	16.2%
Hampton Inn	15.0%
The Westin Hilton Head Island Resort & Spa	8.3%
Hilton Head Island Beach and Tennis Resort	7.5%
Crowne Plaza Hotel	3.8%
Disney's Hilton Head Island Resort	3.8%
Courtyard by Marriott Hilton Head Island	3.4%
Simple Rewards Inn	2.6%
Beach House Resort Hilton Head Island	2.3%
Hilton Beachfront	2.3%
N	291

TABLE 17: Top 10 Hotels or Resorts

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

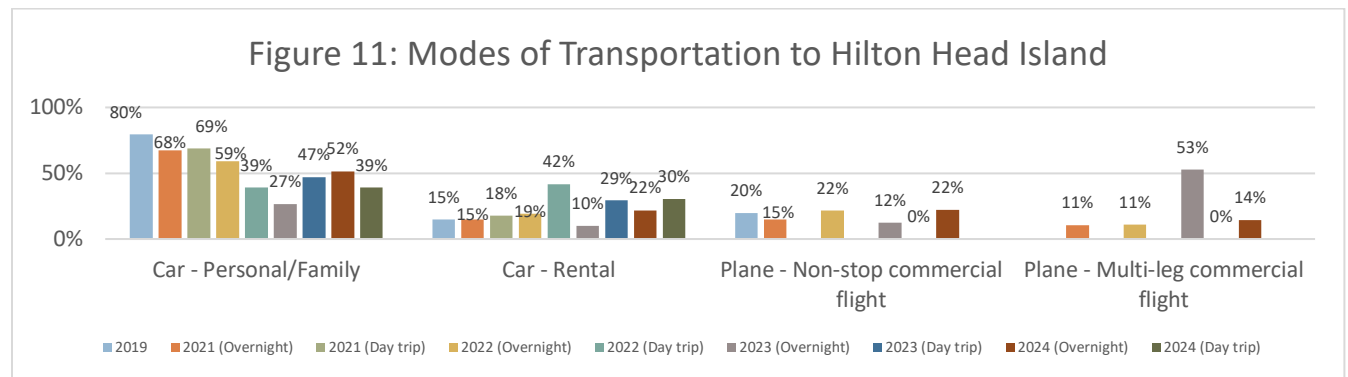
	2019	2021	2022	2023	2024
A Local vacation rental company	22.7%	22.9%	24.7%	22.2%	33.6%
VRBO	32.8%	34.2%	29.2%	32.3%	22.6%
Directly with the resort	11.2%	15.1%	13.0%	10.8%	17.1%
Airbnb	2.4%	10.0%	12.0%	10.2%	15.8%
Vacasa	-	4.9%	5.5%	6.6%	3.4%
TurnKey	-	1.3%	-	3.0%	2.1%
Booking.com	-	0.3%	2.2%	0.6%	1.4%
HomeAway	-	2.2%	3.5%	4.2%	0.7%
Directly with owner	-	6.2%	6.0%	-	-
I don't remember	3.5%	0.8%	3.0%	1.2%	1.4%
None	-	0.5%	0.5%	0.6%	2.1%
Other	23.5%	1.6%	0.5%	8.4%	-
N		371	401	167	146

TABLE 18: Booking Platforms for Home/Villa Rental

What type of transportation did you use to travel to Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Car - Personal/Family	79.5%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%	51.5%	39.1%
Plane - Non-stop commercial flight	19.5% ²	14.8%	-	21.5%	-	12.4%	-	22.1%	-
Car - Rental	14.7%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%	21.8%	30.4%
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-	14.2%	-
Motor Coach/Tour bus	-	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%	10.0%	21.7%
Personal RV	1.1%	2.2%	-	4.9%	1.3%	1.9%	17.6%	5.1%	17.4%
Plane - Private	0.2%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%	2.2%	21.7%
Other	0.6%	0.6%	-	0.1%	-	0.2%	-	0.2%	-
N	953	995	45	1,477	79	1,115	34	551	23

TABLE 19: Modes of Transportation to Hilton Head Island



Visitors Arriving by Plane:

At which airport did you land?

	2019	2021	2022	2023	2024
Savannah/Hilton Head Island International	69.5%	40.6%	38.1%	12.1%	56.5%
Hilton Head Island	12.8%	39.8%	33.8%	81.6%	31.7%
Charleston	9.2%	8.8%	12.7%	3.3%	5.3%
Jacksonville	1.4%	2.0%	5.5%	1.1%	2.8%
Charlotte	1.4%	2.0%	3.3%	0.3%	2.0%
Atlanta	2.8%	5.6%	6.1%	1.4%	-
Other	2.8%	1.2%	0.4%	0.3%	2.0%
N	114	251	488	728	246

TABLE 20: Arrival Airport by Year

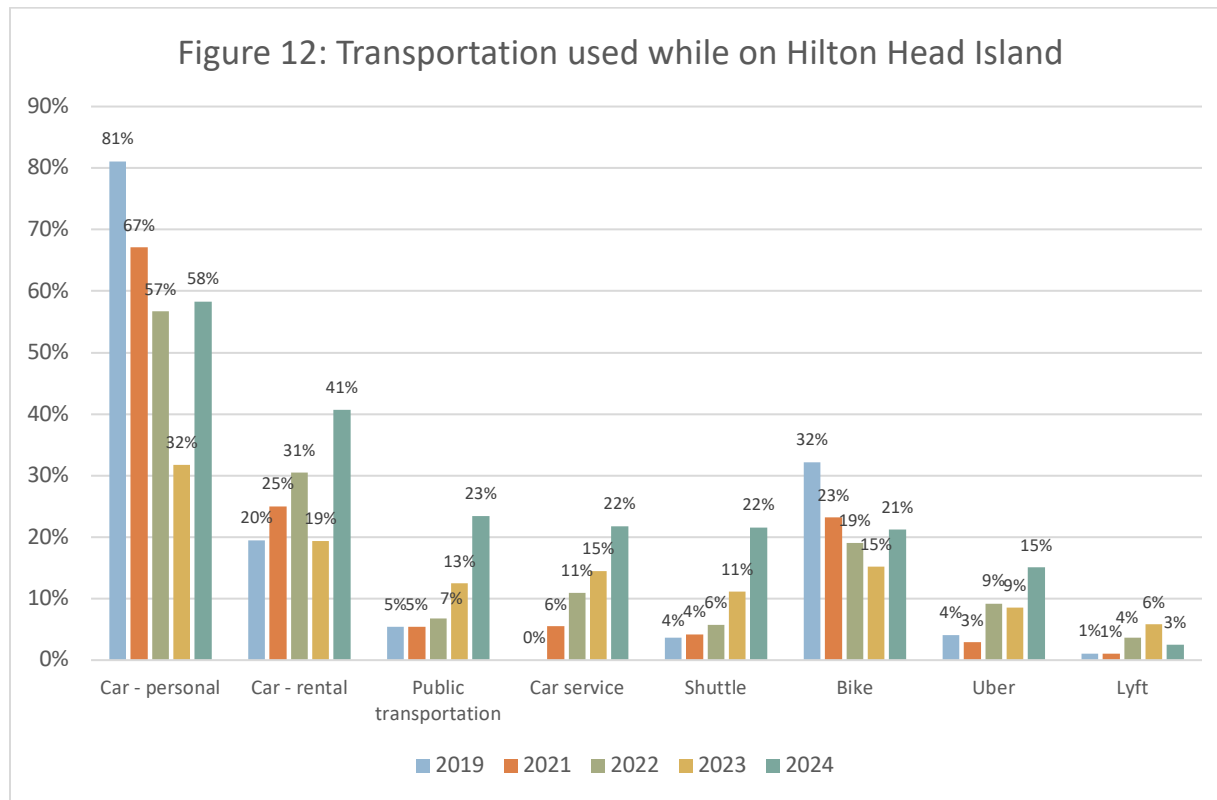
Which commercial airline did you use?

	2021	2022	2023	2024
American Airlines	38.9%	44.8%	25.4%	59.3%
Alaska	2.8%	10.4%	1.7%	8.3%
Air Canada	5.3%	6.8%	12.8%	7.5%
Southwest	8.1%	9.0%	14.2%	7.5%
Allegiant	10.1%	8.1%	2.1%	3.3%
Delta	16.6%	7.0%	2.6%	3.3%
JetBlue	6.5%	3.6%	12.2%	3.3%
Frontier	1.6%	2.3%	11.9%	2.9%
Breeze	1.2%	3.2%	1.4%	2.5%
Silver Airways	0.8%	1.8%	14.2%	1.2%
United	6.9%	1.8%	-	0.8%
Sun Country Airlines	0.4%	0.9%	0.1%	-
Spirit	0.4%	0.2%	-	-
N	247	442	720	241

TABLE 21: Commercial Airlines Used

² The 2019 survey did not divide commercial flights into non-stop and multi-leg, so stated percentage is for all commercial flights.

Once on Hilton Head Island, what mode(s) of transportation did you use?



	2019	2021	2022	2023	2024
Car - personal	81.1%	67.1%	56.7%	31.7%	58.3%
Car - rental	19.5%	25.0%	30.5%	19.4%	40.7%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%	6.8%	12.5%	23.4%
Car service	-	5.5%	10.9%	14.5%	21.8%
Shuttle offered by the hotel/resort	3.7%	4.2%	5.7%	11.1%	21.6%
Bike	32.2%	23.2%	19.1%	15.2%	21.2%
Uber	4.1%	2.9%	9.2%	8.5%	15.1%
Lyft	1.1%	1.0%	3.7%	5.8%	2.5%
Other	-	0.1%	0.1%	-	0.7%
On Foot	-	1.4%	1.3%	0.8%	-
N	948	995	1,477	1,115	551

TABLE 22: Transportation Used While on Hilton Head

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

	Villa Rental	Hotel	Timeshare	Second Homeowner	Non-paying Guests	Day Trip	Overall
Transportation	\$275	\$392	\$410	\$478	\$642	\$94	\$378
Lodging	\$2,810	\$1,163	\$1,517	\$0	\$0	\$0	\$1,409
Food - Dining	\$690	\$445	\$650	\$623	\$480	\$186	\$521
Food - Grocery	\$306	\$198	\$271	\$287	\$170	\$44	\$228
Shopping	\$314	\$590	\$439	\$671	\$855	\$238	\$514
Spas	\$35	\$226	\$66	\$110	\$70	\$8	\$102
Golf	\$66	\$216	\$60	\$196	\$54	\$42	\$109
Biking	\$41	\$70	\$41	\$27	\$9	\$5	\$44
Performance/Visual Arts	\$24	\$263	\$62	\$74	\$37	\$31	\$117
Festivals	\$7	\$170	\$19	\$39	\$32	\$9	\$51
Museums/Historical Tours	\$22	\$158	\$69	\$21	\$75	\$19	\$74
Boating/Sailing/Fishing	\$128	\$273	\$213	\$87	\$286	\$37	\$200
Nature-based Activities	\$9	\$278	\$38	\$167	\$96	\$19	\$100
Dolphin Tours	\$57	\$220	\$69	\$32	\$50	\$17	\$99
Tennis	\$8	\$256	\$12	\$36	\$8	\$17	\$49
Other Expenses	\$38	\$709	\$86	\$177	\$266	\$72	\$278
Total Expenditure	\$4,822	\$3,385	\$4,009	\$3,024	\$3,130	\$836	\$3,656

Table 23: Average Per Travel Party Trip Expenditures by Category and Visitor Type

What are the three primary reasons why you visited Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Beaches	73.5%	75.4%	55.6%	62.0%	38.0%	40.7%	44.1%	61.9%	47.8%
Time with family/friends	48.4%	46.6%	24.4%	32.6%	10.1%	22.2%	26.5%	32.1%	34.8%
Relaxation	58.6%	51.5%	31.1%	34.1%	12.7%	31.7%	20.6%	31.8%	13.0%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	11.3%	12.0%	2.2%	13.3%	3.8%	19.5%	23.5%	22.9%	0.0%
Boating / Sailing / Kayaking	1.6%	7.5%	11.1%	13.6%	16.5%	12.3%	26.5%	22.5%	8.7%
Biking	15.7%	16.4%	11.1%	21.3%	27.8%	17.4%	11.8%	17.1%	21.7%
Heritage attractions / Museum / Historical tours	3.3%	6.5%	20.0%	10.6%	16.5%	6.1%	32.4%	13.4%	17.4%
Business trip (convention, meeting, etc.)	1.2%	5.1%	4.4%	10.5%	24.1%	13.1%	2.9%	11.3%	13.0%
Golf	16.3%	13.7%	8.9%	10.4%	13.9%	14.1%	2.9%	11.3%	8.7%
Shopping	11.7%	10.9%	24.4%	10.7%	8.9%	14.3%	20.6%	11.1%	8.7%
Festivals	4.0%	3.6%	6.7%	8.2%	3.8%	11.6%	8.8%	10.0%	4.3%
Culinary	13.9%	12.2%	31.1%	14.2%	27.8%	14.3%	20.6%	8.3%	8.7%
Attend sporting event	0.6%	4.7%	15.6%	11.2%	10.1%	11.3%	2.9%	7.8%	4.3%
Health/wellness/fitness	2.1%	3.4%	11.1%	5.9%	6.3%	13.1%	8.8%	5.8%	0.0%
Parks	1.4%	1.8%	6.7%	4.9%	5.1%	11.1%	2.9%	5.6%	4.3%
Wedding	-	1.2%	-	1.6%	-	0.9%	2.9%	2.7%	0.0%
Tennis	2.1%	1.7%	6.7%	2.6%	11.4%	3.9%	2.9%	2.4%	4.3%
Other	8.1%	4.1%	-	3.9%	2.5%	1.8%	5.9%	2.2%	8.7%
N	953	995	45	1,477	79	1,115	34	551	23

TABLE 24: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Beaches	83.2%	81.8%	42.2%	69.4%	51.9%	46.0%	44.1%	67.5%	30.4%
Shopping	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%	50.1%	26.1%
Relaxation	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%	42.1%	26.1%
Time with family/friends	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%	40.3%	39.1%
Biking	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%	36.7%	30.4%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%	33.0%	21.7%
Museum / Historical tours	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%	24.3%	21.7%
Culinary	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%	21.8%	4.3%
Water excursions	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%	19.4%	17.4%
Golf	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%	18.5%	4.3%
Festivals	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%	16.2%	13.0%
Health / Wellness / Fitness	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%	15.4%	0.0%
Business/work	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%	15.1%	13.0%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%	14.7%	13.0%
Spas	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%	13.1%	4.3%
Sports activities	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%	8.0%	4.3%
Attend sporting event	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%	7.3%	13.0%
Tennis	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%	5.8%	4.3%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%	3.3%	0.0%
Other	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%	1.3%	17.4%
N	950	995	45	1,477	79	1,115	34	551	23

TABLE 25: Activities Visitors Participated In

Which shopping locations did you visit?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)	2024 (Overnight)	2024 (Day trip)
Coligny Plaza	68.8%	64.7%	26.7%	54.4%	32.9%	31.6%	23.5%	47.0%	13.0%
Main Street Village	25.0%	20.2%	8.9%	24.6%	25.3%	14.9%	20.6%	26.0%	4.3%
Downtown Bluffton	30.5%	25.4%	28.9%	31.1%	34.2%	20.4%	38.2%	40.5%	52.2%
Harbour Town	60.2%	55.8%	26.7%	44.2%	39.2%	29.2%	23.5%	39.0%	13.0%
Shelter Cove Harbour	47.8%	42.0%	17.8%	36.9%	21.5%	23.0%	20.6%	29.0%	13.0%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%	25.0%	8.9%	21.2%	29.4%	30.3%	13.0%
Tanger Outlets	53.2%	34.9%	37.8%	26.1%	22.8%	19.6%	5.9%	20.5%	8.7%
Village at Wexford	16.4%	10.9%	6.7%	12.8%	11.4%	10.9%	11.8%	12.7%	8.7%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%	25.5%	6.3%	18.1%	35.3%	26.0%	26.1%
South Beach Marina	25.2%	21.5%	11.1%	17.7%	15.2%	14.9%	23.5%	22.0%	13.0%
Buckwalter shopping areas	2.9%	4.9%	11.1%	8.3%	10.1%	10.1%	8.8%	14.9%	13.0%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%	21.7%	20.3%	18.3%	20.6%	19.6%	8.7%
Other	5.5%	2.1%	2.2%	2.3%	1.3%	2.1%	67.6%	-	-
None	2.1%	1.5%	2.2%	0.7%	1.3%	0.7%	23.5%	1.3%	8.7%
N	945	995	45	1,477	79	1,115	34	551	23

TABLE 26: Shopping Locations Visited

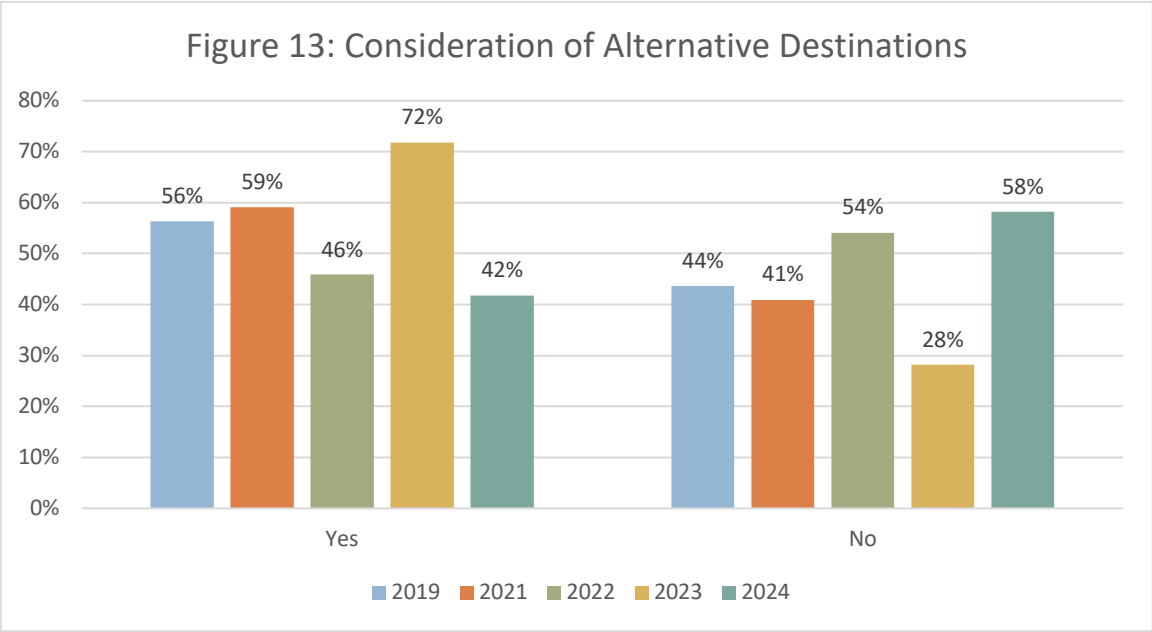
Did you visit any of the following cities while staying on Hilton Head Island?

	2021	2022	2023	2024
Bluffton	37.0%	37.4%	66.2%	45.0%
Beaufort	17.7%	23.2%	9.4%	19.8%
Charleston	15.7%	20.8%	10.5%	23.6%
Daufuskie Island	13.0%	17.1%	7.8%	18.7%
Jacksonville	5.4%	11.3%	4.8%	15.6%
Savannah	29.3%	26.0%	16.0%	23.2%
Tybee Island	7.3%	10.0%	51.1%	16.5%
Other	0.9%	0.5%	0.9%	0.5%
I did not visit any other cities.	28.8%	20.1%	12.2%	18.0%
N	995	1,477	1,115	551

TABLE 27: Other Cities Visited While on Hilton Head

TRAVEL PLANNING

Before deciding to visit Hilton Head Island, did you consider any other destinations?



	2019	2021	2022	2023	2024
Yes	56.4%	59.1%	45.9%	71.8%	41.8%
No	43.6%	40.9%	54.1%	28.2%	58.2%
N	1,691	1,039	1,570	1,114	574

TABLE 28: Consideration of alternative destinations by year

Which of the following destinations did you consider visiting?

	2019	2021	2022	2023	2024
Caribbean	12.5%	23.1%	20.4%	12.1%	29.6%
Hawaiian Islands	4.8%	15.8%	24.4%	14.4%	29.3%
Alabama Golf Trail	1.6%	23.8%	31.9%	15.1%	27.5%
Outer Banks, NC	22.6%	28.9%	20.0%	12.3%	27.5%
Gulf Shores, AL	14.9%	19.8%	28.1%	18.3%	26.1%
Savannah, GA	33.9%	20.0%	19.3%	11.3%	22.6%
Isle of Palms, SC	12.5%	18.1%	16.1%	6.9%	22.6%
Charleston, SC	45.2%	24.2%	19.3%	8.5%	21.3%
Orlando, FL	12.1%	19.3%	15.0%	9.5%	18.5%
Other	11.3%	13.2%	13.6%	12.4%	16.7%
Sanibel Island, FL	13.7%	13.4%	13.8%	7.5%	15.7%
Sea Island, GA	4.8%	10.4%	12.5%	9.4%	14.6%
Kiawah Island, SC	14.1%	15.5%	10.8%	7.5%	13.9%
Aspen, CO	2.0%	11.5%	10.1%	10.4%	13.2%
Marco Island/Naples, FL	12.1%	14.4%	18.2%	11.8%	12.9%
Ponte Vedre, FL	3.6%	8.5%	8.9%	5.5%	12.9%
Telluride, CO	0.8%	7.8%	12.4%	10.3%	12.5%
Sandestin, FL	8.5%	9.2%	13.1%	8.4%	12.5%
Reynolds Plantation, GA	1.2%	8.9%	10.7%	8.3%	12.5%
Napa/Sonoma, CA	2.8%	8.5%	8.9%	6.4%	11.8%
Jekyll Island, GA	12.5%	13.2%	10.1%	10.4%	11.1%
St. Simons Island, GA	-	10.1%	10.4%	7.6%	10.8%
Sarasota, FL	6.9%	7.3%	9.6%	6.9%	10.5%
Myrtle Beach, SC	37.5%	20.5%	12.9%	7.0%	10.1%
Pinehurst, NC	3.2%	9.9%	12.2%	7.0%	9.8%
Tampa/St. Petersburg, FL	10.1%	9.6%	6.5%	6.3%	8.7%
The Florida Keys	19.4%	12.5%	8.5%	11.6%	7.7%
Tybee Island, GA	18.2%	14.6%	8.8%	6.3%	7.0%
Santa Fe, NM	1.6%	2.8%	4.0%	5.4%	7.0%
Bluffton, SC	-	1.9%	4.4%	1.5%	5.2%
Total	248	425	720	800	278

TABLE 29: Alternative Destinations by Year

How did Hilton Head Island make it to your list of places to consider for your vacation?

	2019	2021	2022	2023	2024
Wanted to visit a beach destination.	48.3%	49.7%	45.7%	32.6%	52.3%
It was recommended by friends/family.	18.2%	24.1%	26.2%	12.2%	40.8%
Had visited in the past and wanted to return.	80.3%	60.0%	42.5%	20.4%	40.6%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%	23.3%	23.4%	39.9%
Wanted to visit heritage attractions.	4.6%	7.8%	20.3%	18.2%	32.6%
Wanted to visit someplace new.	8.6%	18.1%	17.8%	10.6%	29.1%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%	10.1%	4.7%	19.2%
Wanted to visit some place within driving distance.	22.7%	23.9%	19.4%	7.9%	18.5%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%	9.9%	4.4%	18.3%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%	6.3%	3.2%	14.1%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%	9.3%	4.2%	7.8%
Wanted to attend a sporting event.	1.7%	2.9%	4.3%	1.9%	6.6%
Other	14.2%	8.5%	5.1%	2.9%	6.6%
Total	953	1,039	1,570	1,288	574

TABLE 30: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

	2021	2022	2023	2024
Very likely	74.3%	62.7%	44.4%	53.7%
Likely	15.0%	22.5%	24.3%	30.4%
Neutral	7.6%	9.5%	17.2%	12.6%
Unlikely	1.9%	3.7%	13.4%	2.2%
Very Unlikely	1.3%	1.7%	0.6%	1.0%
Total	1,027	1,510	1,027	574

TABLE 31: Likelihood of Visiting Hilton Head Island Again

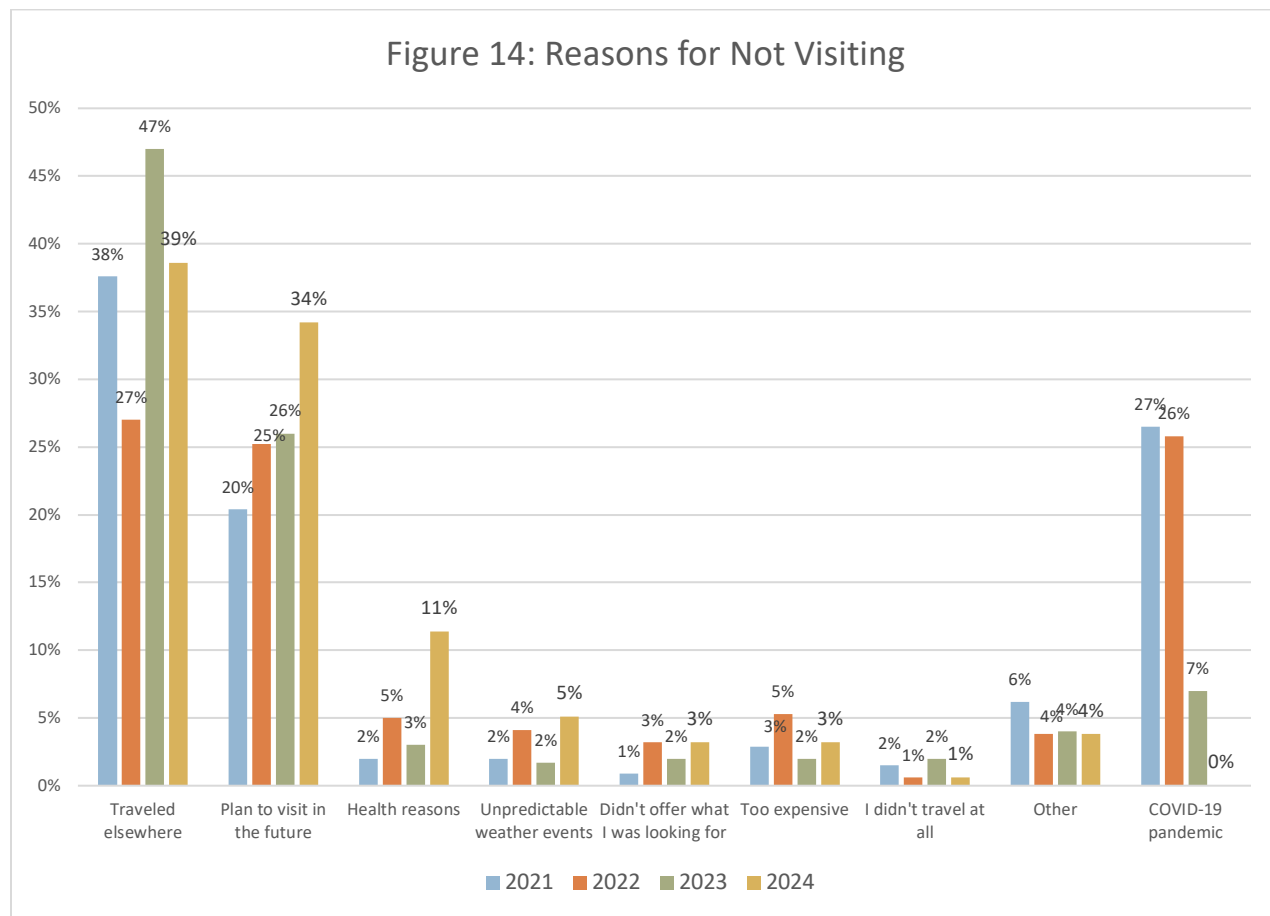
How likely are you to recommend visiting Hilton Head Island to a friend or family member?

	2021	2022	2023	2024
Definitely Recommend	79.7%	70.2%	48.4%	65.6%
Probably Recommend	14.9%	21.8%	22.8%	23.4%
May or May Not Recommend	4.9%	6.2%	14.1%	9.0%
Probably Not Recommend	0.5%	1.5%	14.4%	1.6%
Definitely Not Recommend	-	0.2%	0.2%	0.3%
Total	1,034	1,522	1,039	574

TABLE 32: Likelihood of Recommending a Visit to Hilton Head Island

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	2024
Traveled elsewhere	37.6%	27.0%	47.0%	38.6%
Plan to visit in the future	20.4%	25.2%	26.0%	34.2%
Health reasons	2.0%	5.0%	3.0%	11.4%
Unpredictable weather events	2.0%	4.1%	1.7%	5.1%
Didn't offer what I was looking for	0.9%	3.2%	2.0%	3.2%
Too expensive	2.9%	5.3%	2.0%	3.2%
I didn't travel at all	1.5%	0.6%	2.0%	0.6%
Other	6.2%	3.8%	4.0%	3.8%
COVID-19 pandemic	26.5%	25.8%	7.0%	-
Total	860	341	100	158

TABLE 33: Reasons for not visiting

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

	2021	2022	2023	2024
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%	34.4%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%	33.1%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%	25.5%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%	23.6%
Canada	1.4%	10.9%	16.0%	16.6%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%	14.6%
Europe	1.2%	7.3%	10.0%	14.6%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%	14.0%
Latin America and Caribbean	2.1%	6.5%	6.0%	12.1%
Asia	0.5%	4.4%	8.0%	12.1%
Australia/New Zealand	0.2%	3.2%	6.0%	5.1%
Africa	0.3%	1.2%	1.0%	2.5%
Total	860	341	100	157

TABLE 34: 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	2024
Never visited	38.9%	42.9%	33.7%	29.7%
1	18.6%	14.0%	9.5%	16.3%
2 to 5	30.2%	36.4%	40.8%	45.5%
6 to 10	9.8%	5.0%	13.6%	6.5%
11 to 20	1.9%	0.9%	1.2%	1.6%
21 or more	0.9%	0.5%	1.2%	0.4%
Total	860	341	169	246

TABLE 35: 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	2024
Yes, within one year	49.2%	50.1%	48.8%	36.7%
Yes, but not sure when	42.5%	49.0%	47.0%	55.9%
No	8.3%	0.9%	4.2%	36.7%
Total	859	341	168	245

TABLE 36: Plans of visiting Hilton Head Island in the Future by Non-Visitors

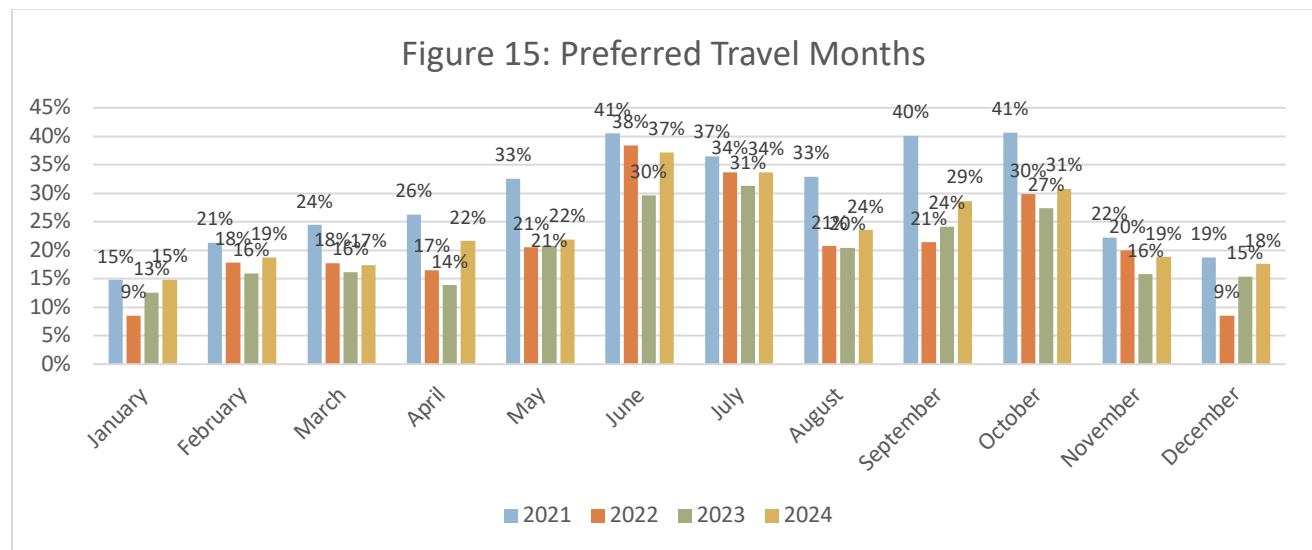
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2021	2022	2023	2024
0 to 1	15.3%	10.0%	7.3%	11.7%
2 to 4	55.1%	47.3%	50.6%	57.8%
5 to 7	19.2%	29.9%	23.4%	18.8%
8 to 10	6.3%	8.2%	15.8%	8.7%
More than 10	4.1%	4.7%	2.9%	3.0%
Total	1,042	984	1,625	1,025

TABLE 37: Frequency of Leisure/Vacation Trips

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



	2021	2022	2023	2024
January	14.8%	8.5%	12.6%	14.8%
February	21.3%	17.8%	15.9%	18.8%
March	24.4%	17.7%	16.1%	17.4%
April	26.2%	16.5%	13.9%	21.6%
May	32.5%	20.5%	20.8%	21.9%
June	40.5%	38.4%	29.6%	37.1%
July	36.5%	33.7%	31.3%	33.7%
August	32.9%	20.7%	20.4%	23.6%
September	40.1%	21.4%	24.1%	28.7%
October	40.6%	29.8%	27.3%	30.8%
November	22.2%	20.0%	15.8%	18.8%
December	18.7%	8.5%	15.3%	17.6%
Total	1,042	984	1,625	1,040

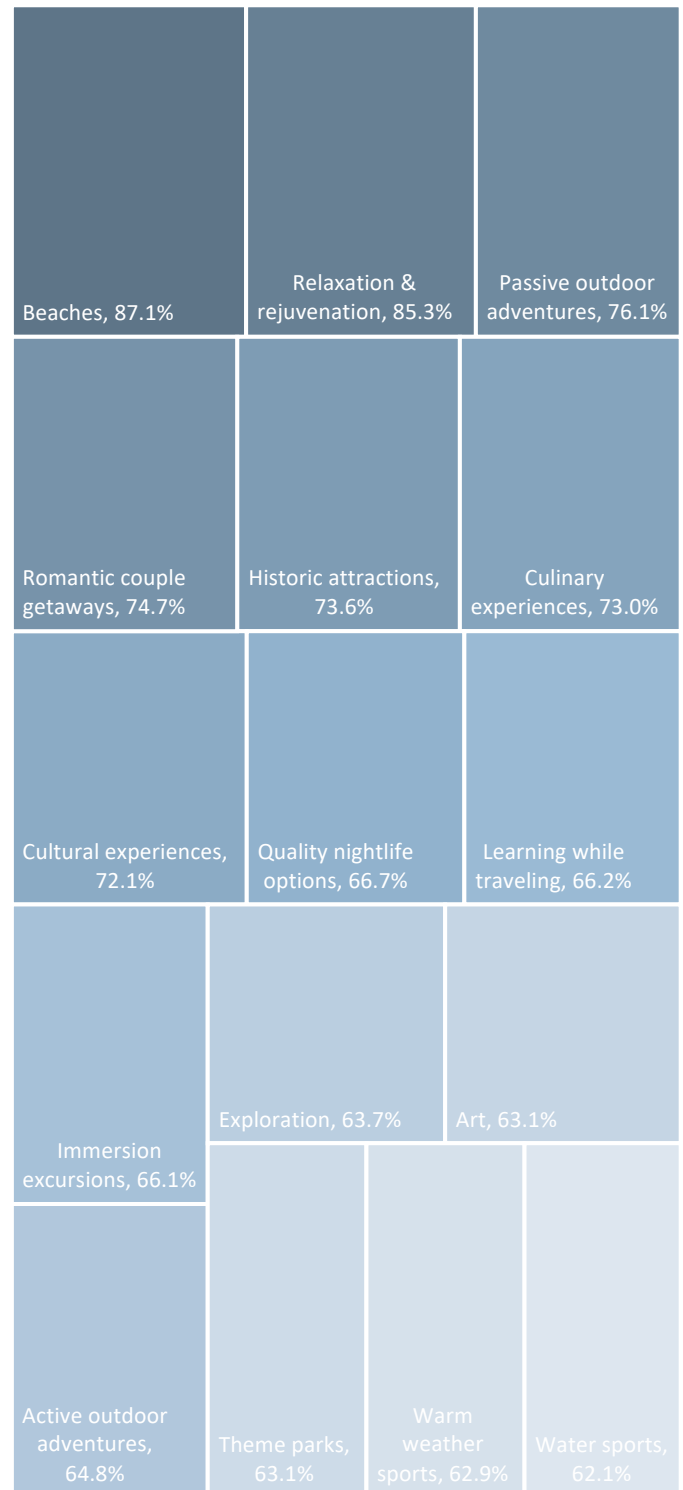
TABLE 38: Preferred Travel Months

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

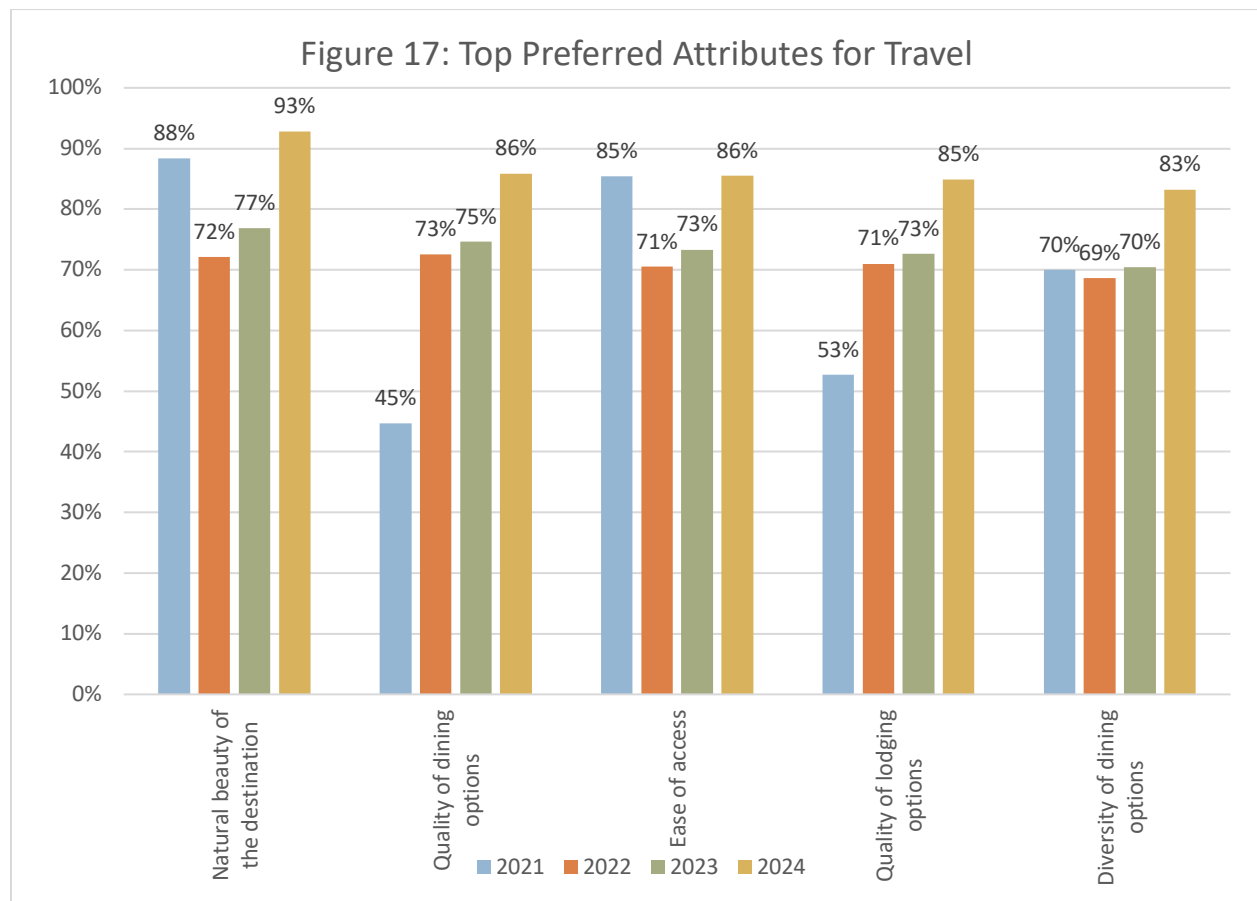
"Appealing" + "Very Appealing"	2021	2022	2023	2024
Beaches	88.4%	65.1%	71.2%	87.1%
Relaxation & rejuvenation	85.4%	66.9%	72.2%	85.3%
Passive outdoor adventures	72.6%	64.4%	63.7%	76.1%
Romantic couple getaways	70.0%	65.0%	60.8%	74.7%
Historic attractions	75.5%	64.4%	60.9%	73.6%
Culinary experiences	70.1%	63.7%	60.3%	73.0%
Cultural experiences	70.7%	62.9%	57.5%	72.1%
Quality nightlife options	52.6%	60.3%	52.2%	66.7%
Learning while traveling	60.9%	56.3%	54.1%	66.2%
Immersion excursions	49.6%	57.4%	51.1%	66.1%
Active outdoor adventures	46.8%	59.6%	51.9%	64.8%
Exploration	57.5%	59.8%	54.1%	63.7%
Art	49.8%	57.1%	49.2%	63.1%
Theme parks	44.7%	58.7%	51.7%	63.1%
Warm weather sports	52.7%	61.2%	53.5%	62.9%
Water sports	48.8%	60.4%	51.1%	62.1%
Performing/cultural arts getaways	51.2%	58.6%	50.5%	61.0%
Luxury camping	39.9%	55.0%	50.7%	60.6%
Urban getaway	48.4%	58.5%	48.0%	60.2%
Spectator sporting events	49.2%	57.0%	51.5%	59.7%
Waterparks	40.3%	54.4%	47.9%	58.4%
Medical/wellness	40.8%	55.5%	47.9%	56.1%
Golf getaways	37.4%	50.6%	41.9%	52.3%
Winter sports	30.2%	53.9%	42.5%	51.7%
Voluntourism	29.5%	49.9%	40.8%	47.6%
Tennis getaways	25.8%	48.5%	36.2%	47.0%
Total	949	1,005	1,625	967

TABLE 39: 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	2024
Natural beauty of the destination	88.4%	72.1%	76.9%	92.8%
Quality of dining options	44.7%	72.5%	74.6%	85.8%
Ease of access	85.4%	70.5%	73.3%	85.5%
Quality of lodging options	52.7%	71.0%	72.6%	84.9%
Diversity of dining options	70.0%	68.6%	70.4%	83.2%
Affordability	75.5%	67.2%	73.0%	80.6%
Diversity of lodging options	25.8%	67.3%	65.9%	77.8%
Low traffic congestion	60.9%	64.8%	63.6%	74.7%
Travel distance	70.7%	63.1%	63.3%	71.1%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%	69.9%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%	66.9%
Activities like events/festivals	49.6%	64.2%	55.4%	66.0%
Nightlife activity options	48.4%	61.4%	53.2%	65.7%
Medical/wellness	37.4%	60.4%	52.6%	60.1%
Public transportation	57.5%	57.0%	49.2%	57.9%
Total	949	1,005	1,625	967

TABLE 40: 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.	8.8%	19.8%	25.2%	31.2%	15.0%
I try to support the local economy of places that I visit.	28.0%	47.8%	17.3%	3.3%	3.5%
N 989					

TABLE 41: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
New York-Newark-Jersey City, NY-NJ	73	7.1%
Los Angeles-Long Beach-Anaheim, CA	42	4.1%
Seattle-Tacoma-Bellevue, WA	38	3.7%
Washington-Arlington-Alexandria, DC-VA-MD-WV	33	3.2%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	28	2.7%
Lexington-Fayette, KY	27	2.6%
Rochester, NY	25	2.4%
Atlanta-Sandy Springs-Roswell, GA	22	2.2%
Charleston-North Charleston, SC	20	2.0%
Chicago-Naperville-Elgin, IL-IN	19	1.9%
Pittsburgh, PA	19	1.9%
Charlotte-Concord-Gastonia, NC-SC	17	1.7%
Dallas-Fort Worth-Arlington, TX	16	1.6%
Hilton Head Island-Bluffton-Port Royal, SC	14	1.4%
Baltimore-Columbia-Towson, MD	13	1.3%
Las Vegas-Henderson-North Las Vegas, NV	13	1.3%
Myrtle Beach-Conway-North Myrtle Beach, SC	13	1.3%
Louisville/Jefferson County, KY-IN	12	1.2%
Cincinnati, OH-KY-IN	11	1.1%
Phoenix-Mesa-Chandler, AZ	11	1.1%
Boston-Cambridge-Newton, MA-NH	10	1.0%
Miami-Fort Lauderdale-West Palm Beach, FL	10	1.0%
Rural OH	10	1.0%
Columbia, SC	9	0.9%
Detroit-Warren-Dearborn, MI	9	0.9%
Minneapolis-St. Paul-Bloomington, MN-WI	9	0.9%
Columbus, OH	8	0.8%
Birmingham, AL	7	0.7%
Fresno, CA	7	0.7%
Greenville-Anderson-Greer, SC	7	0.7%
Indianapolis-Carmel-Greenwood, IN	7	0.7%
Milwaukee-Waukesha, WI	7	0.7%
Providence-Warwick, RI-MA	7	0.7%
San Francisco-Oakland-Fremont, CA	7	0.7%
San Jose-Sunnyvale-Santa Clara, CA	7	0.7%
St. Louis, MO-IL	7	0.7%
Virginia Beach-Chesapeake-Norfolk, VA-NC	7	0.7%
Akron, OH	6	0.6%
Denver-Aurora-Centennial, CO	6	0.6%
Fort Collins-Loveland, CO	6	0.6%
Little Rock-North Little Rock-Conway, AR	6	0.6%
New Orleans-Metairie, LA	6	0.6%
Rural SC	6	0.6%
San Diego-Chula Vista-Carlsbad, CA	6	0.6%
Tampa-St. Petersburg-Clearwater, FL	6	0.6%
Asheville, NC	5	0.5%

MSA	Count	Percent
Athens-Clarke County, GA	5	0.5%
Augusta-Richmond County, GA-SC	5	0.5%
Buffalo-Cheektowaga, NY	5	0.5%
Montgomery, AL	5	0.5%
Orlando-Kissimmee-Sanford, FL	5	0.5%
Riverside-San Bernardino-Ontario, CA	5	0.5%
Rural TX	5	0.5%
Sacramento-Roseville-Folsom, CA	5	0.5%
Allentown-Bethlehem-Easton, PA-NJ	4	0.4%
Davenport-Moline-Rock Island, IA-IL	4	0.4%
Dayton-Kettering-Beavercreek, OH	4	0.4%
Janesville-Beloit, WI	4	0.4%
Kansas City, MO-KS	4	0.4%
Knoxville, TN	4	0.4%
Memphis, TN-MS-AR	4	0.4%
Nashville-Davidson--Murfreesboro--Franklin, TN	4	0.4%
Toledo, OH	4	0.4%
Waco, TX	4	0.4%
Albuquerque, NM	3	0.3%
Chattanooga, TN-GA	3	0.3%
Deltona-Daytona Beach-Ormond Beach, FL	3	0.3%
Des Moines-West Des Moines, IA	3	0.3%
Durham-Chapel Hill, NC	3	0.3%
El Paso, TX	3	0.3%
Fargo, ND-MN	3	0.3%
Florence, SC	3	0.3%
Greensboro-High Point, NC	3	0.3%
Gulfport-Biloxi, MS	3	0.3%
Oklahoma City, OK	3	0.3%
Portland-Vancouver-Hillsboro, OR-WA	3	0.3%
Richmond, VA	3	0.3%
Rural NV	3	0.3%
Spartanburg, SC	3	0.3%
Sumter, SC	3	0.3%
Syracuse, NY	3	0.3%
Terre Haute, IN	3	0.3%
Tuscaloosa, AL	3	0.3%
Wichita, KS	3	0.3%
Albany-Schenectady-Troy, NY	2	0.2%
Augusta-Waterville, ME	2	0.2%
Austin-Round Rock-San Marcos, TX	2	0.2%
Bellingham, WA	2	0.2%
Cape Coral-Fort Myers, FL	2	0.2%
Columbia, MO	2	0.2%
Crestview-Fort Walton Beach-Destin, FL	2	0.2%
Eau Claire, WI	2	0.2%
Evansville, IN	2	0.2%
Greeley, CO	2	0.2%
Harrisburg-Carlisle, PA	2	0.2%

MSA	Count	Percent
Hartford-West Hartford-East Hartford, CT	2	0.2%
Houston-Pasadena-The Woodlands, TX	2	0.2%
Huntsville, AL	2	0.2%
Hutchinson, KS	2	0.2%
Jackson, MS	2	0.2%
Jacksonville, FL	2	0.2%
Juneau, AK	2	0.2%
Kingsport-Bristol, TN-VA	2	0.2%
Kingston, NY	2	0.2%
Lakeland-Winter Haven, FL	2	0.2%
Lansing-East Lansing, MI	2	0.2%
Macon-Bibb County, GA	2	0.2%
Mobile, AL	2	0.2%
Ottawa, IL	2	0.2%
Owatonna, MN	2	0.2%
Parkersburg-Vienna, WV	2	0.2%
Peoria, IL	2	0.2%
Portland-South Portland, ME	2	0.2%
Raleigh-Cary, NC	2	0.2%
Rural KS	2	0.2%
Rural KY	2	0.2%
Rural NY	2	0.2%
Rural WI	2	0.2%
San Antonio-New Braunfels, TX	2	0.2%
Santa Cruz-Watsonville, CA	2	0.2%
Savannah, GA	2	0.2%
Springfield, MA	2	0.2%
Stockton-Lodi, CA	2	0.2%
Topeka, KS	2	0.2%
Trenton-Princeton, NJ	2	0.2%
Tucson, AZ	2	0.2%
Youngstown-Warren, OH	2	0.2%
Aberdeen, WA	1	0.1%
Adrian, MI	1	0.1%
Albany, GA	1	0.1%
Alexander City, AL	1	0.1%
Anchorage, AK	1	0.1%
Ann Arbor, MI	1	0.1%
Auburn, NY	1	0.1%
Bakersfield-Delano, CA	1	0.1%
Barnstable Town, MA	1	0.1%
Batavia, NY	1	0.1%
Beatrice, NE	1	0.1%
Beaumont-Port Arthur, TX	1	0.1%
Beaver Dam, WI	1	0.1%
Beckley, WV	1	0.1%
Bemidji, MN	1	0.1%
Bend, OR	1	0.1%
Bennington, VT	1	0.1%

MSA	Count	Percent
Blacksburg-Christiansburg-Radford, VA	1	0.1%
Boise City, ID	1	0.1%
Branson, MO	1	0.1%
Bremerton-Silverdale-Port Orchard, WA	1	0.1%
Bridgeport-Stamford-Danbury, CT	1	0.1%
Brookings, SD	1	0.1%
Bucyrus, OH	1	0.1%
Campbellsville, KY	1	0.1%
Canton-Massillon, OH	1	0.1%
Cedar Rapids, IA	1	0.1%
Charleston, WV	1	0.1%
Charlottesville, VA	1	0.1%
Chillicothe, OH	1	0.1%
Clarksville, TN-KY	1	0.1%
Columbus, GA-AL	1	0.1%
Concord, NH	1	0.1%
Corning, NY	1	0.1%
Daphne-Fairhope-Foley, AL	1	0.1%
Del Rio, TX	1	0.1%
Dublin, GA	1	0.1%
Duluth, MN-WI	1	0.1%
East Stroudsburg, PA	1	0.1%
Easton, MD	1	0.1%
Effingham, IL	1	0.1%
El Dorado, AR	1	0.1%
Elizabeth City, NC	1	0.1%
Elizabethtown, KY	1	0.1%
Elko, NV	1	0.1%
Eugene-Springfield, OR	1	0.1%
Evanston, WY-UT	1	0.1%
Fallon, NV	1	0.1%
Faribault-Northfield, MN	1	0.1%
Fayetteville-Springdale-Rogers, AR	1	0.1%
Fayetteville, NC	1	0.1%
Fergus Falls, MN	1	0.1%
Flint, MI	1	0.1%
Fond du Lac, WI	1	0.1%
Fort Payne, AL	1	0.1%
Fort Wayne, IN	1	0.1%
Frankfort, IN	1	0.1%
Gaffney, SC	1	0.1%
Gainesville, GA	1	0.1%
Grand Forks, ND-MN	1	0.1%
Green Bay, WI	1	0.1%
Greeneville, TN	1	0.1%
Greenville, NC	1	0.1%
Grenada, MS	1	0.1%
Hannibal, MO	1	0.1%
Hays, KS	1	0.1%

MSA	Count	Percent
Helena, MT	1	0.1%
Indiana, PA	1	0.1%
Jackson, MI	1	0.1%
Jacksonville, TX	1	0.1%
Jasper, IN	1	0.1%
Johnstown, PA	1	0.1%
Kennewick-Richland, WA	1	0.1%
Kill Devil Hills, NC	1	0.1%
Kirksville, MO	1	0.1%
Klamath Falls, OR	1	0.1%
Lafayette-West Lafayette, IN	1	0.1%
Lancaster, PA	1	0.1%
Las Cruces, NM	1	0.1%
Lima, OH	1	0.1%
Lubbock, TX	1	0.1%
Lynchburg, VA	1	0.1%
Marquette, MI	1	0.1%
McAllen-Edinburg-Mission, TX	1	0.1%
Meridian, MS	1	0.1%
Middlesborough, KY	1	0.1%
Monroe, MI	1	0.1%
Morgantown, WV	1	0.1%
Mount Pleasant, TX	1	0.1%
Napa, CA	1	0.1%
New Philadelphia-Dover, OH	1	0.1%
Norfolk, NE	1	0.1%
North Port-Bradenton-Sarasota, FL	1	0.1%
Ocala, FL	1	0.1%
Odessa, TX	1	0.1%
Ogden, UT	1	0.1%
Omaha, NE-IA	1	0.1%
Opelousas, LA	1	0.1%
Orangeburg, SC	1	0.1%
Oxford, MS	1	0.1%
Oxnard-Thousand Oaks-Ventura, CA	1	0.1%
Panama City-Panama City Beach, FL	1	0.1%
Pensacola-Ferry Pass-Brent, FL	1	0.1%
Pueblo, CO	1	0.1%
Redding, CA	1	0.1%
Roanoke, VA	1	0.1%
Rural AK	1	0.1%
Rural AZ	1	0.1%
Rural FL	1	0.1%
Rural GU	1	0.1%
Rural LA	1	0.1%
Rural ME	1	0.1%
Rural MI	1	0.1%
Rural MO	1	0.1%
Rural NC	1	0.1%

MSA	Count	Percent
Rural NE	1	0.1%
Rural OK	1	0.1%
Rural SD	1	0.1%
Rural VA	1	0.1%
Rural WV	1	0.1%
Saginaw, MI	1	0.1%
Salt Lake City-Murray, UT	1	0.1%
Santa Maria-Santa Barbara, CA	1	0.1%
Scranton--Wilkes-Barre, PA	1	0.1%
Sebastian-Vero Beach-West Vero Corridor, FL	1	0.1%
Seneca, SC	1	0.1%
Sioux City, IA-NE-SD	1	0.1%
Spokane-Spokane Valley, WA	1	0.1%
St. Joseph, MO-KS	1	0.1%
State College, PA	1	0.1%
Staunton-Stuarts Draft, VA	1	0.1%
Texarkana, TX-AR	1	0.1%
Tupelo, MS	1	0.1%
Twin Falls, ID	1	0.1%
Utica-Rome, NY	1	0.1%
Valdosta, GA	1	0.1%
Watertown-Fort Atkinson, WI	1	0.1%
Williamsport, PA	1	0.1%
Wooster, OH	1	0.1%
Worcester, MA	1	0.1%
Yankton, SD	1	0.1%



COLLEGE OF
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