ESTIMATED TOTAL IMPACT OF TOURISM IN

Bluffton

ON BEAUFORT COUNTY, SOUTH CAROLINA 2025

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CONDUCTED BY:

MELINDA PATIENCE
DANIEL GUTTENTAG, PH.D.

COLLEGE OF CHARLESTON
OFFICE OF TOURISM ANALYSIS

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

Table of Contents

Introduction

This study estimates the economic impact generated by tourism to the Town of Bluffton in the year 2025. 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 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 various third-party entities (e.g., Key Data), combined with visitor behavior data that is collected via a Visitor Profile Survey. The total estimated number of visitors in each segment for 2025 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 2025, 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	171,649
Day Trip	307,883
Total Visitors	**479,532**

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.

Table 2. 2025 Estimated Total Expenditure by Spending Category

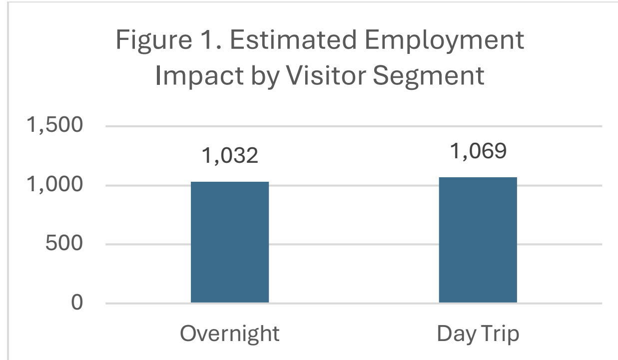
Category	Totals
Transportation (around the destination)	$18,357,005
Lodging	$32,729,408
Food – Dining Out	$37,244,164
Food – Groceries	$7,376,530
Shopping	$34,235,415
Spas	$1,162,203
Golf	$3,120,633
Biking	$612,155
Performance/Visual Arts	$3,509,492
Festivals	$1,089,274
Museums/Historical Tours	$3,597,663
Boating/Sailing/Fishing	$8,294,867
Nature-based Activities	$1,586,858
Dolphin Tours	$941,831
Tennis	$892,811
Other Expenses	$11,635,274
Total Expenditure	**$166,385,583**

- ***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.

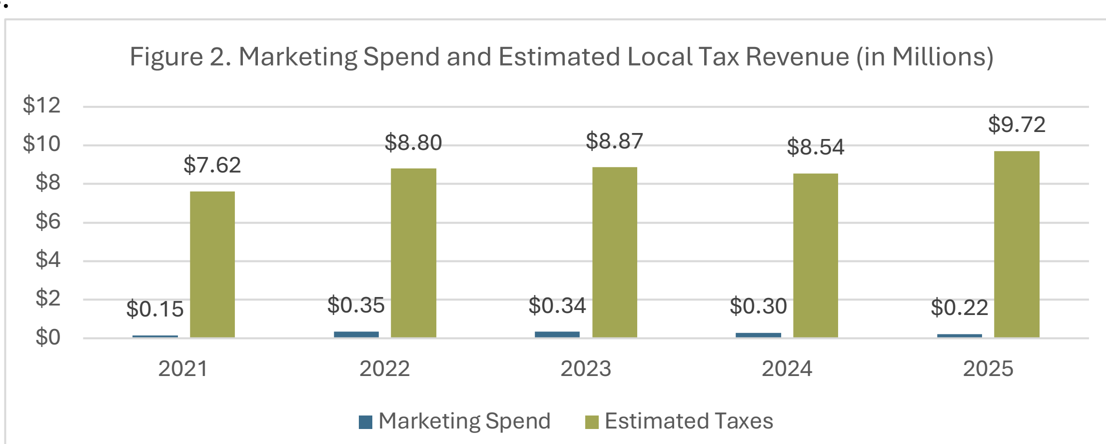
Results

Visitation numbers to Bluffton remained quite stable in 2025, declining by less than 1% versus the prior year. An estimated total of **480 thousand visitors** came to Bluffton in 2025, down 0.9% compared to 2024. The overall economic impact of this tourism on Beaufort County was **$206.59 million**, up 0.4% compared to 2024. 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 **1,787 jobs**, which represent 2.0% of all jobs in Beaufort County, as per employment data provided by the Bureau of Labor Statistics. 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 **1.24**. This signifies that every dollar spent by tourists in Bluffton increased output in the overall Beaufort County economy by a total of $1.24.



The tourist expenditures generated an estimated **$2.50 million** in tax revenues for local Beaufort County governments. The Town of Bluffton earned an additional **$7.22 million** in accommodations tax and hospitality tax, as reported by the Town of Bluffton Revenue Services. Together, this **$9.72 million** in tax revenue represents an increase of just over $1.17 million (13.7%) compared to 2024, and an increase of 9.5% compared to 2023. This tax revenue also corresponds with a Return on Tax Investment (ROTI) of 44.76, based on the $217.1 thousand that was spent on destination marketing in 2025. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **$44.76** in local tax revenue. The comparative relationship over the past four years between destination marketing expenditure and the estimated local tax revenues generated from tourism can be seen in Figure 2.



Appendix

Table A1. Overnight – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	785	$24,121,400	$87,950,993
Indirect	160	$8,458,739	$28,442,188
Induced	86	$4,378,767	$15,566,345
Total	**1,032**	**$36,958,905**	**$131,959,527**

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

	Employment	Labor Income	Output
Direct	591	$14,622,201	$44,888,824
Indirect	110	$5,607,111	$19,976,354
Induced	54	$2,746,724	$9,765,205
Total	**755**	**$22,976,036**	**$74,630,383**

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

	Employment	Labor Income	Output
Direct	1,376	$38,743,601	$132,839,817
Indirect	271	$14,065,850	$48,418,542
Induced	140	$7,125,491	$25,331,550
Total	**1,787**	**$59,934,942**	**$206,589,909**
Estimated Local Tax Revenue			$2,495,430
Local Tourism Tax Revenue (ATax and HTax)			$7,221,181
Total Estimated Local Tax Revenue			**$9,716,611**

Table A4. Top 50 Industries Impacted by Bluffton Tourism

	Display Description	Impact Output
1	Full-service restaurants	$38,616,994.21
2	Hotels and motels, including casino hotels	$32,734,437.86
3	Retail - Miscellaneous store retailers	$18,947,020.54
4	Transit and ground passenger transportation	$17,827,599.89
5	Other real estate	$11,921,949.34
6	Water transportation	$7,611,218.59
7	Insurance agencies, brokerages, and related activities	$5,894,623.04
8	Owner-occupied housing	$5,176,179.62
9	Museums, historical sites, zoos, and parks	$4,993,027.52
10	Fitness and recreational sports centers	$4,845,164.40
11	Performing arts companies	$3,906,810.79
12	Retail - Food and beverage stores	$2,838,913.37
13	Monetary authorities and depository credit intermediation	$2,108,056.28
14	All other food and drinking places	$1,483,206.38
15	Securities and commodity contracts intermediation and brokerage	$1,466,522.48
16	Scenic and sightseeing transportation and support activities for transportation	$1,419,440.60
17	Personal care services	$1,403,623.41
18	Employment services	$1,387,658.81
19	Legal services	$1,383,218.43
20	Other local government enterprises	$1,368,557.84
21	Travel arrangement and reservation services	$1,363,587.21
22	Services to buildings	$1,362,536.88
23	Other amusement and recreation industries	$1,326,339.57
24	Advertising, public relations, and related services	$1,234,255.63
25	Limited-service restaurants	$1,133,375.86
26	Management of companies and enterprises	$1,127,524.59
27	Maintenance and repair construction of nonresidential structures	$1,064,028.89
28	Nondepository credit intermediation and related activities	$1,050,113.05
29	Postal service	$1,032,807.42
30	Offices of physicians	$1,024,271.08
31	Management consulting services	$984,371.51
32	Landscape and horticultural services	$973,558.84
33	Data processing, hosting, and related services	$867,961.15
34	Other financial investment activities	$851,914.24
35	Lessors of nonfinancial intangible assets	$725,055.05

36	Internet publishing and broadcasting and web search portals	$720,666.77
37	Accounting, tax preparation, bookkeeping, and payroll services	$676,044.24
38	Automotive repair and maintenance, except car washes	$671,253.50
39	Commercial and industrial machinery and equipment rental and leasing	$668,366.15
40	Retail - Motor vehicle and parts dealers	$640,724.15
41	Insurance carriers, except direct life	$618,989.70
42	Wholesale - Other nondurable goods merchant wholesalers	$605,556.72
43	Retail - General merchandise stores	$596,426.10
44	Personal and household goods repair and maintenance	$572,338.32
45	Tenant-occupied housing	$556,807.14
46	Truck transportation	$541,039.61
47	All other miscellaneous professional, scientific, and technical services	$520,775.57
48	Couriers and messengers	$494,407.79
49	Independent artists, writers, and performers	$486,026.87
50	Retail - Building material and garden equipment and supplies stores	$481,008.79