



# Bluffton Visitor Profile Survey

2021

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CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

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## TABLE OF CONTENTS

<b><i>Executive Summary .....</i></b>	<b><i>2</i></b>
<b><i>Methodology.....</i></b>	<b><i>5</i></b>
<b><i>Survey Findings.....</i></b>	<b><i>6</i></b>
Demographics .....	6
Point of Origin .....	7
Travel to Bluffton .....	9
Travel Planning.....	21
Non-Visitors .....	24
Travel Behavior – All Respondents.....	26
<b><i>Appendix .....</i></b>	<b><i>30</i></b>



## EXECUTIVE SUMMARY

### SAMPLE DEMOGRAPHICS

Baby Boomers represented 39.4% of the respondents, followed by Gen X (27.1%), and then Millennials (25.2%). Over 52% of those surveyed had a Bachelor's degree or higher, and more than 60% had an annual household income of \$75,000 or more per year. Also, just over 70% of the respondents were married.

### POINT OF ORIGIN

The respondents resided in 268 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the US, stretching from east to west coast. More respondents resided in Ohio than any other state (8.7%). Second was New York (7.1%), followed then by Pennsylvania (5.9%), Georgia and California (5.8% each), Florida (4.8%), and then North Carolina and Michigan (4.7% each). In-state visitors did not make up a significantly large portion of the respondents (4.0%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ-PA; Chicago-Naperville-Elgin, IL-IN-WI; Atlanta-Sandy Springs-Roswell, GA; Pittsburgh, PA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Cleveland-Elyria, OH; Detroit-Warren-Dearborn, MI; and Los Angeles-Long Beach-Anaheim, CA.

Canada was the top international origin market amongst respondents (50.0%), followed by Europe (33.8%).

### 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, 75% were first-time visitors, suggesting that the destination continues to appeal to new visitors.

## TRIP CHARACTERISTICS

The average group size of those surveyed was 4.5 for overnight visitors and 3.8 for day trip visitors. The main mode of transportation to town was personal/family car (45.8% overnight; 67.9% day trip). About 40.9% of overnight visitors flew to Bluffton via commercial flights, with just over one-third of them (34.2%) landing at the Hilton Head Island Airport.

The average length of stay for those overnight visitors surveyed was approximately 4.0 nights. Hotels were the most popular choice of accommodation for overnight visitors (33.1%), followed by resorts (25.9%), staying with friends/relatives (20.5%), and home/villa rentals (18.1%).

## TRAVEL PLANNING

Airbnb was the most popular online booking platform for villas/homes (27.6%), followed by HomeAway (13.8%), local vacation rental companies (10.3%), and the local resorts' online booking platforms (10.3%). The top five other destinations visitors considered before choosing Bluffton were the Hawaiian Islands; the Alabama Golf Trail; Gulf Shores, AL; Isle of Palms, SC; and Orlando, FL.

Top reasons for choosing to visit Bluffton were wanting to visit a beach destination (32.6%), word-of-mouth recommendation (29.0%), previous visit experience (28.0%), and wanting to visit nature-based attractions (23.3%).

Of those surveyed, 85.8% indicated an intention to return to visit Bluffton.

## 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=860), just 38.6% had never visited the Hilton Head Island / Bluffton area before, and 48.8% had visited 1-5 times before.

Of those non-visitors, 37.6% traveled elsewhere, 2.9% found it too expensive, 2.0% mentioned health reasons, 2.0% were hesitant because of unpredictable weather events, 1.5% did not travel at all, and 0.9% did not find what they were looking for. Over 26% stated the COVID-19 pandemic kept 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 (26.9%) and Midwest (10.5%) were the most popular. Nonetheless, 49% 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 (55.1%) 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/vacation were: beaches (88.4%), relaxation & rejuvenation (85.4%), historical attractions (75.5%), passive outdoor adventures (72.6%), and cultural experience (70.7%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (88.4%), ease of access (85.4%), affordability (75.5%), environmental/ecological sensitivity (72.6%), travel distance (70.7%), diversity of dining options (70.0%), and low traffic congestion (60.9%).



## METHODOLOGY

### SURVEY IMPLEMENTATION

The 2021 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between June 2021 and January 2022, emails were sent on a rolling basis to invite individuals to participate in the VPS. These individuals had previously visited [www.visitbluffton.org](http://www.visitbluffton.org) or [www.hiltonheadisland.org](http://www.hiltonheadisland.org) and submitted their email addresses, and they were generally contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted in January 2022 on the social media channels of Explore Bluffton and the Hilton Head Island Visitor & Convention Bureau.

A total of 2,084 completed surveys were collected. This report is based largely on the 194 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.

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

Visitor Segment	
Non-paying Guests	172,349
Daytrippers	309,137
<b>Total Visitors</b>	<b>481,486</b>

Table 1: Visitor Estimates 2021



## SURVEY FINDINGS

### SAMPLE DEMOGRAPHICS

<b>Gender</b>	
Female	61.0%
Male	39.0%
<b>Marital Status</b>	
Married	70.2%
Single	11.9%
Divorced	8.9%
Widowed	7.4%
Separated	1.6%
<b>Education (highest level completed)</b>	
Grade School	1.4%
High School	8.0%
Some College	22.8%
Associates Degree (2 years)	15.1%
Bachelor's Degree (4 years)	32.1%
Graduate Degree (Post degree/MA)	20.7%
<b>Age</b>	
19 years or younger	0.1%
20 to 29 years	12.2%
30 to 39 years	19.1%
40 to 49 years	10.2%
50 to 59 years	16.7%
60 to 69 years	24.6%
70 years and over	14.8%
Prefer not to say	2.3%
<b>Household Income</b>	
Under \$24,999	2.7%
\$25,000-\$34,999	8.2%
\$35,000-\$49,999	9.6%
\$50,000-\$74,999	18.6%
\$75,000-\$99,999	18.6%
\$100,000-\$149,999	22.0%
\$150,000-\$199,999	11.5%
\$200,000-\$249,999	4.3%
\$250,000 or more	4.4%
<b>N</b>	<b>975</b>

Table 2: Demographics

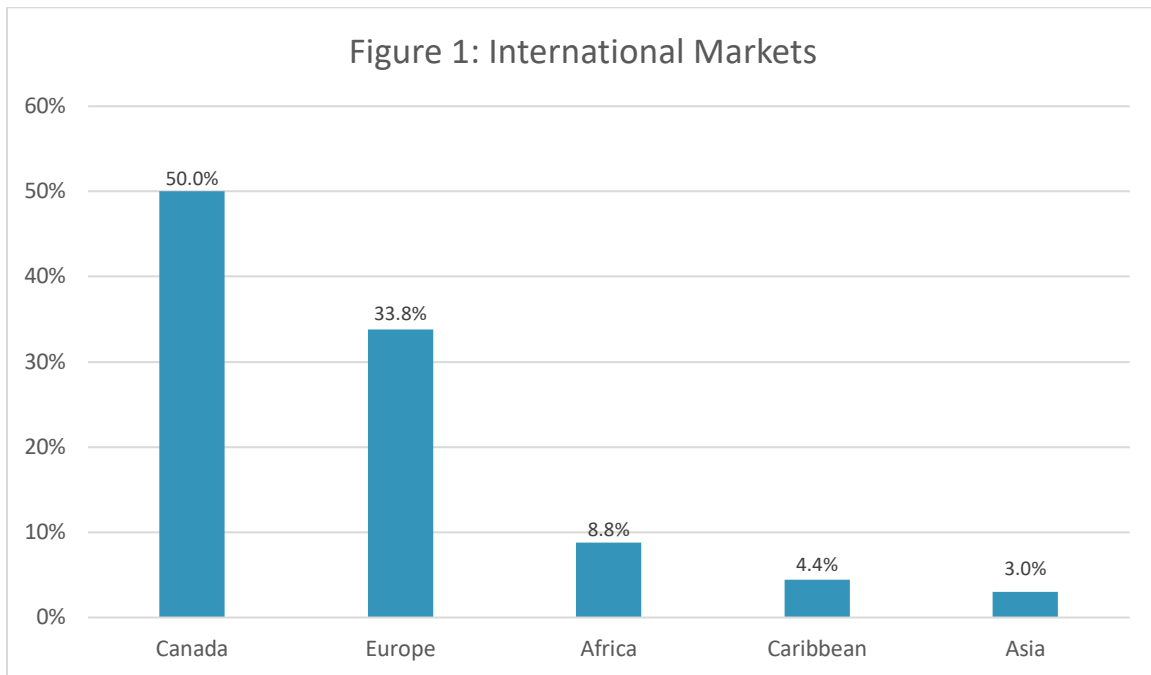
## SAMPLE POINT OF ORIGIN

## ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	New York-Newark-Jersey City, NY-NJ-PA	61	7.5%
2	Chicago-Naperville-Elgin, IL-IN-WI	26	3.2%
3	Atlanta-Sandy Springs-Roswell, GA	24	3.0%
4	Pittsburgh, PA	20	2.5%
5	Washington-Arlington-Alexandria, DC-VA-MD-WV	19	2.3%
6	Cleveland-Elyria, OH	18	2.2%
7	Detroit-Warren-Dearborn, MI	16	2.0%
8	Los Angeles-Long Beach-Anaheim, CA	16	2.0%
9	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	15	1.9%
10	Columbus, OH	14	1.7%
11	Boston-Cambridge-Newton, MA-NH	12	1.5%
12	Dallas-Fort Worth-Arlington, TX	12	1.5%
13	Charlotte-Concord-Gastonia, NC-SC	10	1.2%
14	Cincinnati, OH-KY-IN	10	1.2%
15	San Francisco-Oakland-Hayward, CA	10	1.2%
16	Kansas City, MO-KS	9	1.1%
17	Phoenix-Mesa-Scottsdale, AZ	9	1.1%
18	Houston-The Woodlands-Sugar Land, TX	8	1.0%
19	Indianapolis-Carmel-Anderson, IN	8	1.0%
20	Miami-Fort Lauderdale-West Palm Beach, FL	8	1.0%
21	Nashville-Davidson--Murfreesboro--Franklin, TN	8	1.0%
22	St. Louis, MO-IL	8	1.0%
23	Akron, OH	7	0.9%
24	Baltimore-Columbia-Towson, MD	7	0.9%
25	Denver-Aurora-Lakewood, CO	7	0.9%
26	Louisville/Jefferson County, KY-IN	7	0.9%
27	Minneapolis-St. Paul-Bloomington, MN-WI	7	0.9%
28	Omaha-Council Bluffs, NE-IA	7	0.9%
29	Raleigh, NC	7	0.9%
30	Richmond, VA	7	0.9%
	Other	412	50.9%
	Total	809	

Table 3: ZIP Code Analysis – Top 30 MSAs

## International Markets

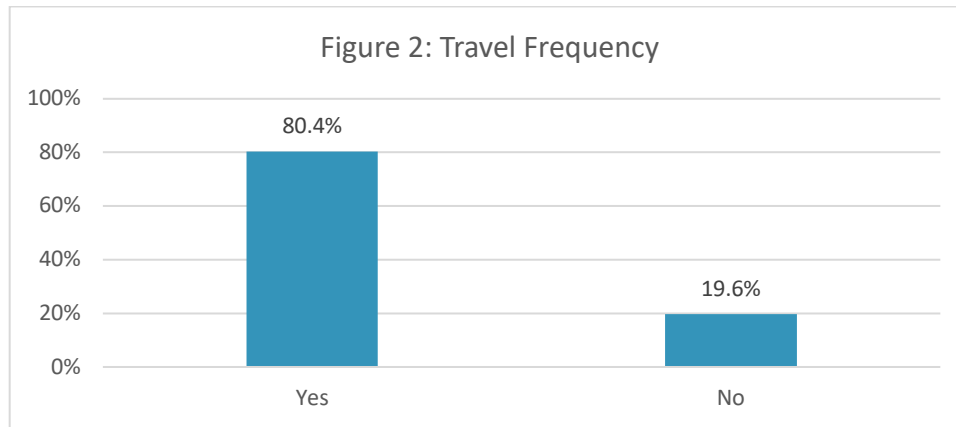


Canada	50.0%
Europe	33.8%
Africa	8.8%
Caribbean	4.4%
Asia	3.0%
N	68

Table 4: International Markets

## TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

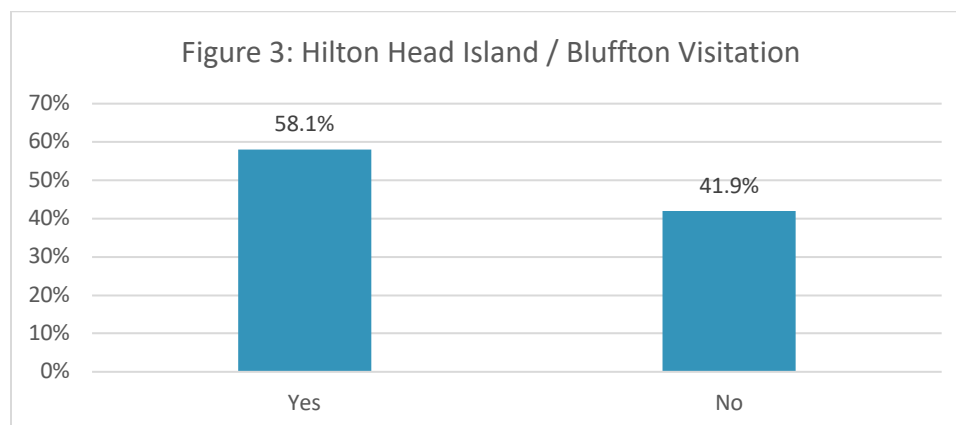
Within the last 12 months have you traveled or taken a vacation?



Yes	80.4%
No	19.6%
N	2,084

TABLE 5: Travel Frequency by Year

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

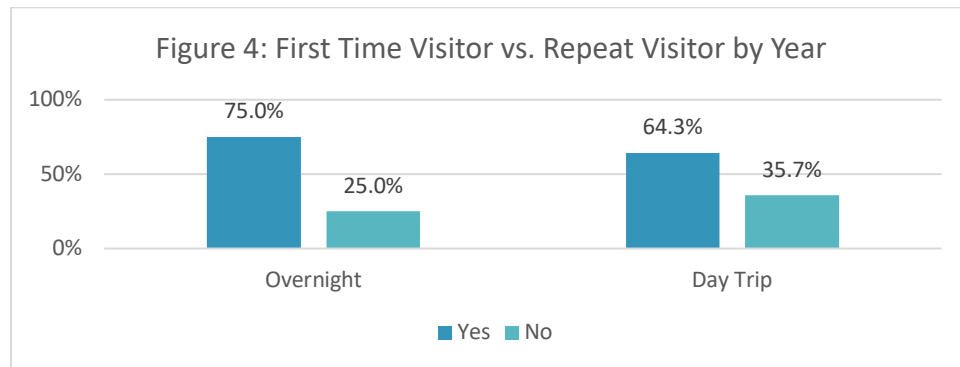


Yes	58.1%
No	41.9%
N	2,084

TABLE 6: Bluffton / Hilton Head Island Visitation by Year

## BLUFFTON VISITORS

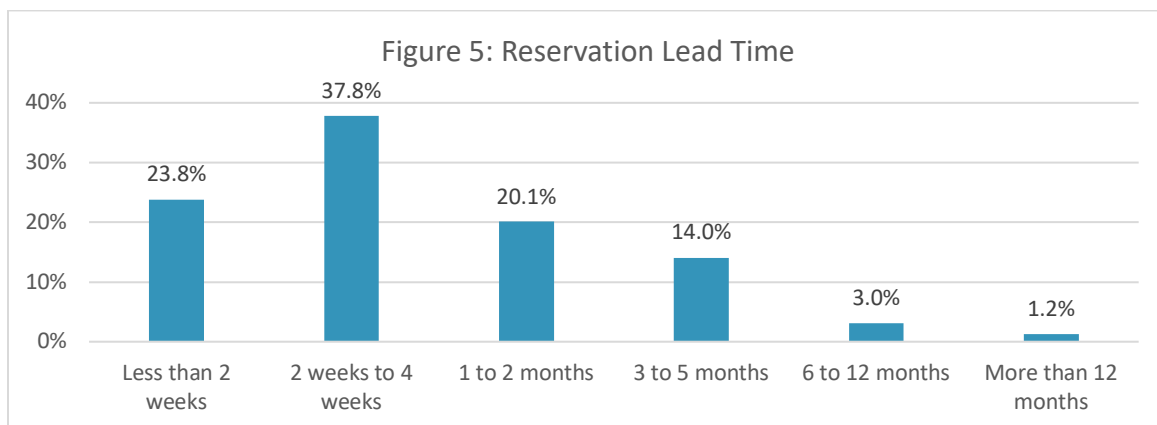
Was that your first time visiting in Bluffton?



	Overnight	Day Trip
Yes	75.0%	64.3%
No	25.0%	35.7%
N	164	28

TABLE 7: First Time Visitor vs. Repeat Visitor

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



Less than 2 weeks	23.8%
2 weeks to 4 weeks	37.8%
1 to 2 months	20.1%
3 to 5 months	14.0%
6 to 12 months	3.0%
More than 12 months	1.2%
N	164

TABLE 8: Reservation Lead Time



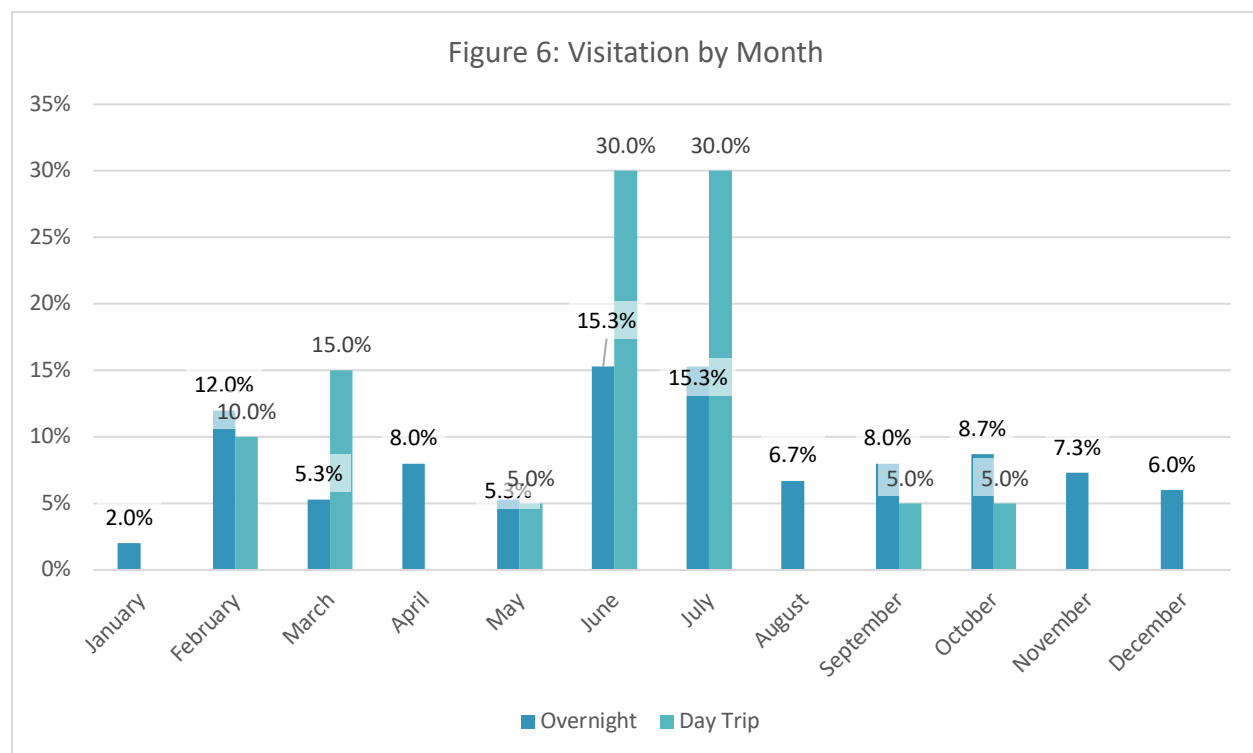
When did you make your most recent trip to Bluffton?

	Overnight	Day Trip
<b>2020</b>	29.3%	15.8%
<b>2021</b>	70.7%	84.2%
<b>N</b>	150	19

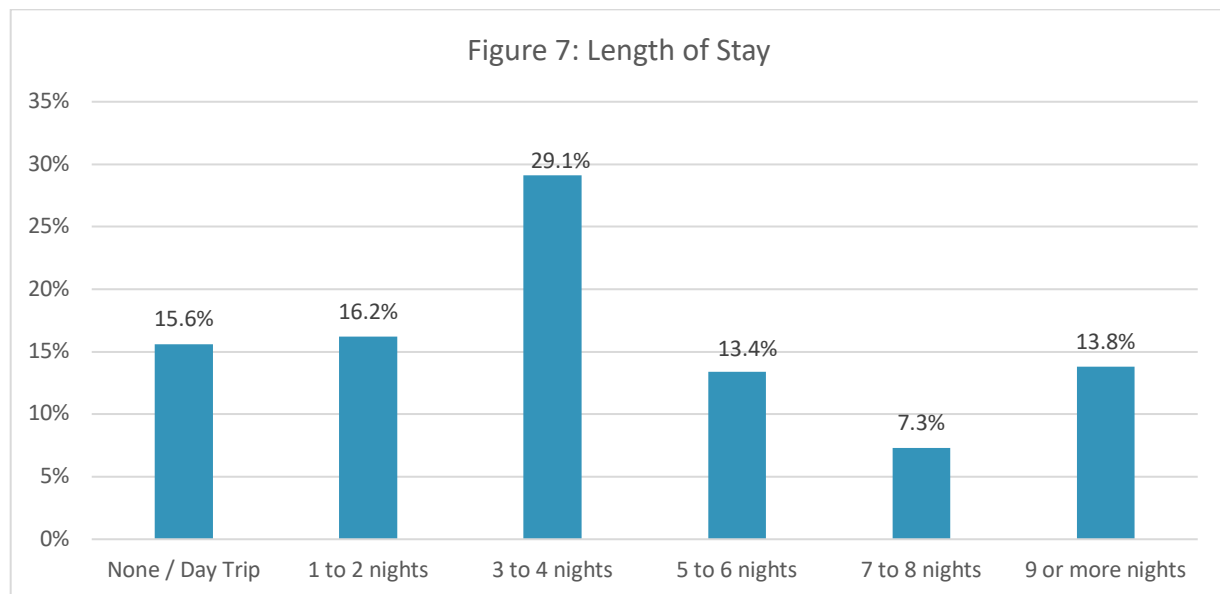
TABLE 9: Visitation Year

	Overnight	Day Trip
<b>January</b>	2.0%	-
<b>February</b>	12.0%	10.0%
<b>March</b>	5.3%	15.0%
<b>April</b>	8.0%	-
<b>May</b>	5.3%	5.0%
<b>June</b>	15.3%	30.0%
<b>July</b>	15.3%	30.0%
<b>August</b>	6.7%	-
<b>September</b>	8.0%	5.0%
<b>October</b>	8.7%	5.0%
<b>November</b>	7.3%	-
<b>December</b>	6.0%	-
<b>N</b>	150	20

TABLE 10: Visitation by Month



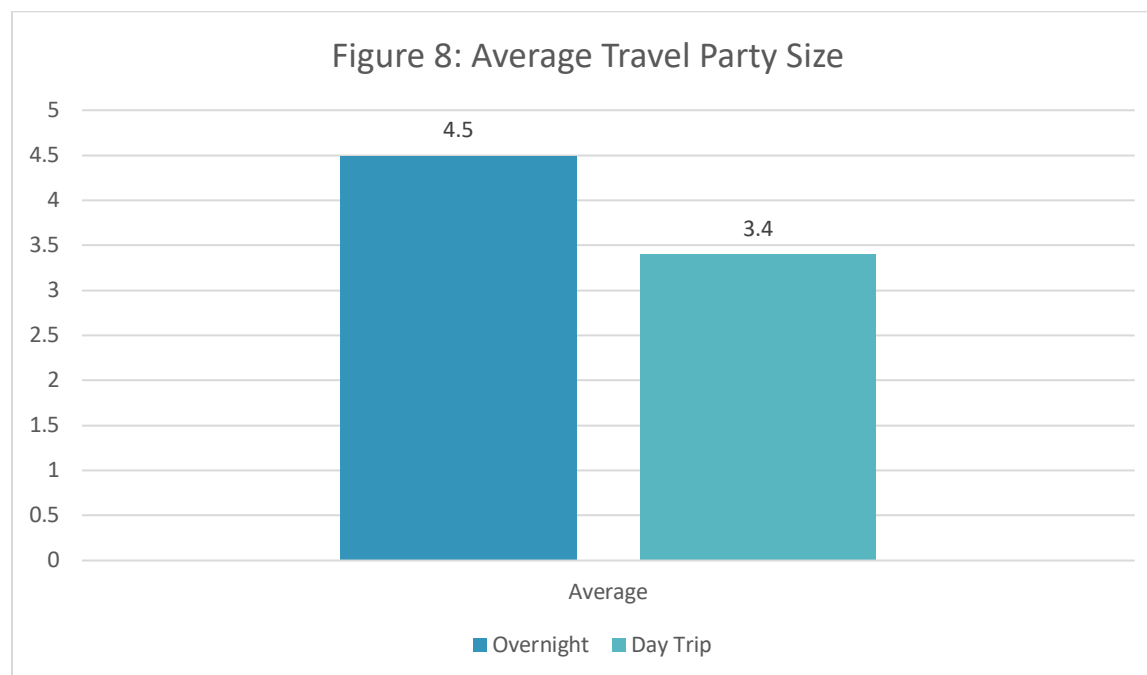
Approximately how many nights was your trip to Bluffton?



None/day trip only	15.6%
1 night	3.4%
2 nights	12.8%
3 nights	18.4%
4 nights	10.6%
5 nights	13.4%
6 nights	-
7 nights	4.5%
8 nights	2.8%
9 nights	2.2%
10 nights	5.6%
11 nights	1.7%
12 nights	1.7%
13 nights	1.7%
14 nights	1.7%
15 nights	1.1%
More than 15 nights	2.8%
N	179

TABLE 11: Length of Stay

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



	Overnight	Day Trip
<b>Average</b>	4.5	3.4
<b>N</b>	151	21

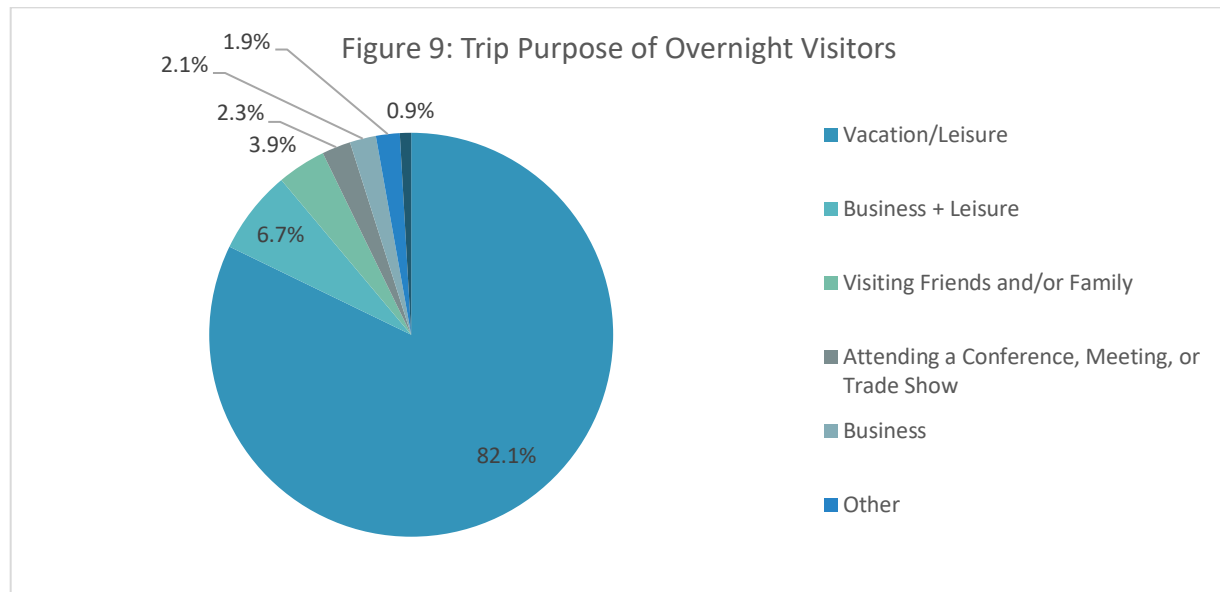
TABLE 12: Travel Party Size

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

	Age	0	1	2	3	4	5	6 or more
<b>Overnight</b>	<b>Under 18</b>	69.5%	10.6%	6.6%	0.7%	0.7%	0.7%	0.7%
	<b>18-24</b>	66.2%	7.9%	9.3%	2.0%	0.7%	0.7%	2.6%
	<b>25-34</b>	45.0%	15.9%	13.2%	4.6%	1.3%	4.0%	5.3%
	<b>35-44</b>	59.6%	11.3%	9.9%	3.3%	2.0%	0.7%	2.6%
	<b>45-54</b>	70.2%	11.3%	3.3%	2.6%	0.7%	0.7%	0.7%
	<b>55-64</b>	75.5%	7.3%	6.0%	-	0.7%	-	-
	<b>65+</b>	78.1%	6.0%	5.3%	-	0.0%	-	-
<b>Day Trip</b>	<b>Under 18</b>	95.2%	4.8%	14.3%	-	4.8%	-	-
	<b>18-24</b>	100.0%	4.8%	9.5%	-	-	-	-
	<b>25-34</b>	76.2%	9.5%	28.6%	-	-	-	-
	<b>35-44</b>	100.0%	14.3%	-	-	-	-	-
	<b>45-54</b>	85.7%	4.8%	23.8%	-	-	-	-
	<b>55-64</b>	95.2%	9.5%	-	-	4.8%	-	4.8%
	<b>65+</b>	85.7%	14.3%	14.3%	-	-	-	-

TABLE 13: Travel Party Age Mix

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



<b>Vacation/Leisure</b>	46.3%
<b>Business + Leisure</b>	22.1%
<b>Visiting Friends and/or Family</b>	16.8%
<b>Attending a Conference, Meeting, or Trade Show</b>	9.4%
<b>Attending a Festival/Special Event, Performance, or Exhibit</b>	3.4%
<b>Relocating to Hilton Head/Bluffton area</b>	2.0%
<b>N</b>	149

TABLE 14: Trip Purpose of Overnight Visitors

#### Day Trip Visitors:

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

<b>Part of a vacation</b>	50.0%
<b>Day trip from home</b>	50.0%
<b>N</b>	28

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

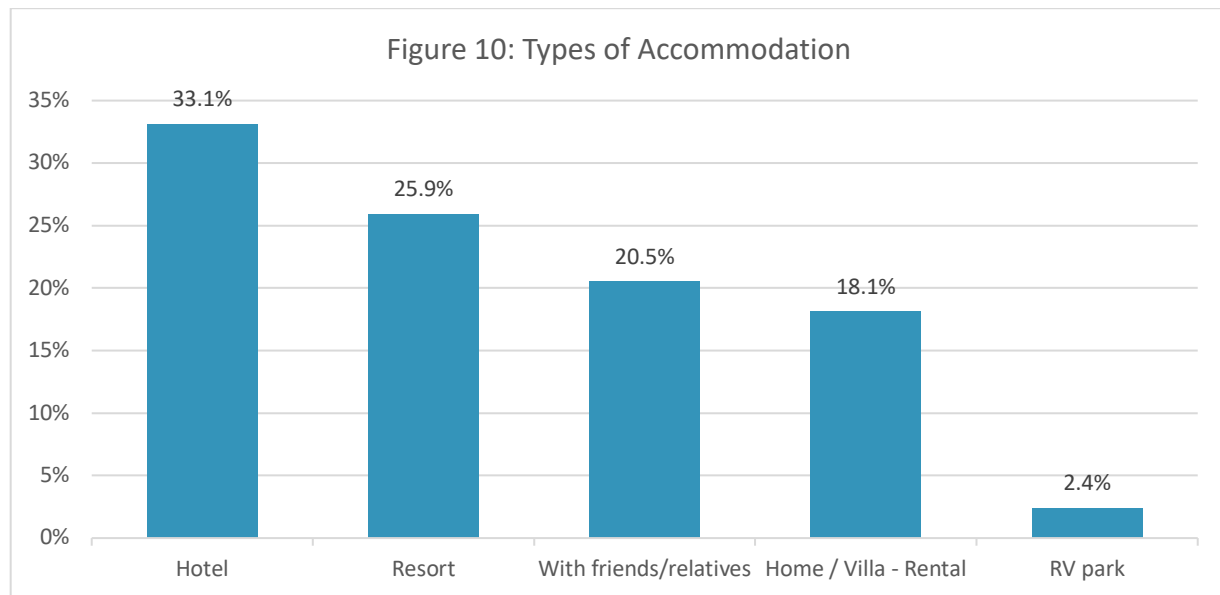
Where did you stay overnight?

<b>Savannah</b>	45.5%
<b>Beaufort</b>	18.2%
<b>Charleston</b>	18.2%
<b>Jacksonville</b>	9.1%
<b>Other</b>	9.1%
<b>N</b>	11

TABLE 16: Vacation Day Trip Visitors Overnight Location

*Overnight Visitors:*

What was your primary form of accommodation while visiting Bluffton?



<b>Hotel</b>	33.1%
<b>Resort</b>	25.9%
<b>With friends/relatives</b>	20.5%
<b>Home / Villa - Rental</b>	18.1%
<b>RV park</b>	2.4%
<b>N</b>	166

TABLE 17: Types of Accommodation

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

<b>Montage Palmetto Bluff</b>	31.6%
<b>Comfort Suites</b>	19.3%
<b>Old Town Bluffton Inn</b>	12.3%
<b>Hampton Inn</b>	8.8%
<b>Hilton Garden Inn</b>	7.0%
<b>Grand Hilton Head Inn</b>	5.3%
<b>Candlewood Suites</b>	3.5%
<b>Holiday Inn</b>	3.5%
<b>Holiday Inn Express</b>	3.5%
<b>Best Western Ocean Breeze Inn</b>	1.8%
<b>N</b>	57

TABLE 18: Top 10 Hotels or Resorts

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

<b>Airbnb</b>	27.6%
<b>HomeAway</b>	13.8%
<b>Local vacation rental company</b>	10.3%
<b>Directly with the resort</b>	10.3%
<b>TurnKey</b>	10.3%
<b>VRBO</b>	10.3%
<b>Booking.com</b>	6.9%
<b>Vacasa</b>	6.9%
<b>None</b>	3.4%
<b>N</b>	29

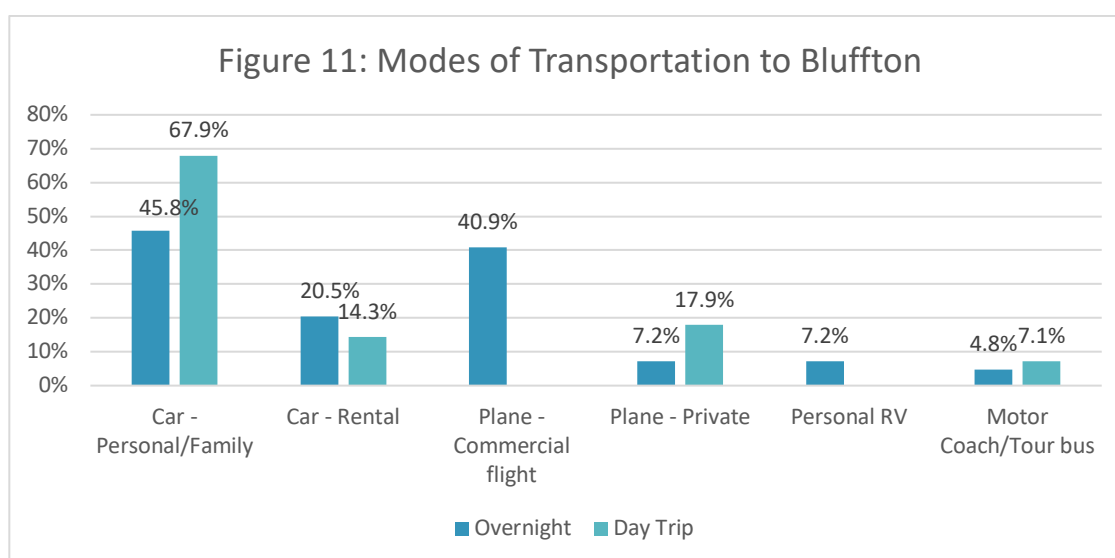
TABLE 19: Booking Platforms for Home/Villa Rental



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

	Overnight	Day Trip
<b>Car - Personal/Family</b>	45.8%	67.9%
<b>Car - Rental</b>	20.5%	14.3%
<b>Plane - Non-stop commercial flight</b>	30.1%	-
<b>Plane - Multi-leg commercial flight</b>	10.8%	-
<b>Plane - Private</b>	7.2%	17.9%
<b>Personal RV</b>	7.2%	-
<b>Motor Coach/Tour bus</b>	4.8%	7.1%
<b>N</b>	166	28

TABLE 20: Modes of Transportation to Bluffton



Visitors Arriving by Plane:

At which airport did you land?

<b>Hilton Head Island</b>	34.2%
<b>Savannah/Hilton Head Island International</b>	23.3%
<b>Charleston</b>	16.4%
<b>Atlanta</b>	13.7%
<b>Jacksonville</b>	9.6%
<b>Charlotte</b>	2.7%
<b>N</b>	73

TABLE 21: Arrival Airport by Year

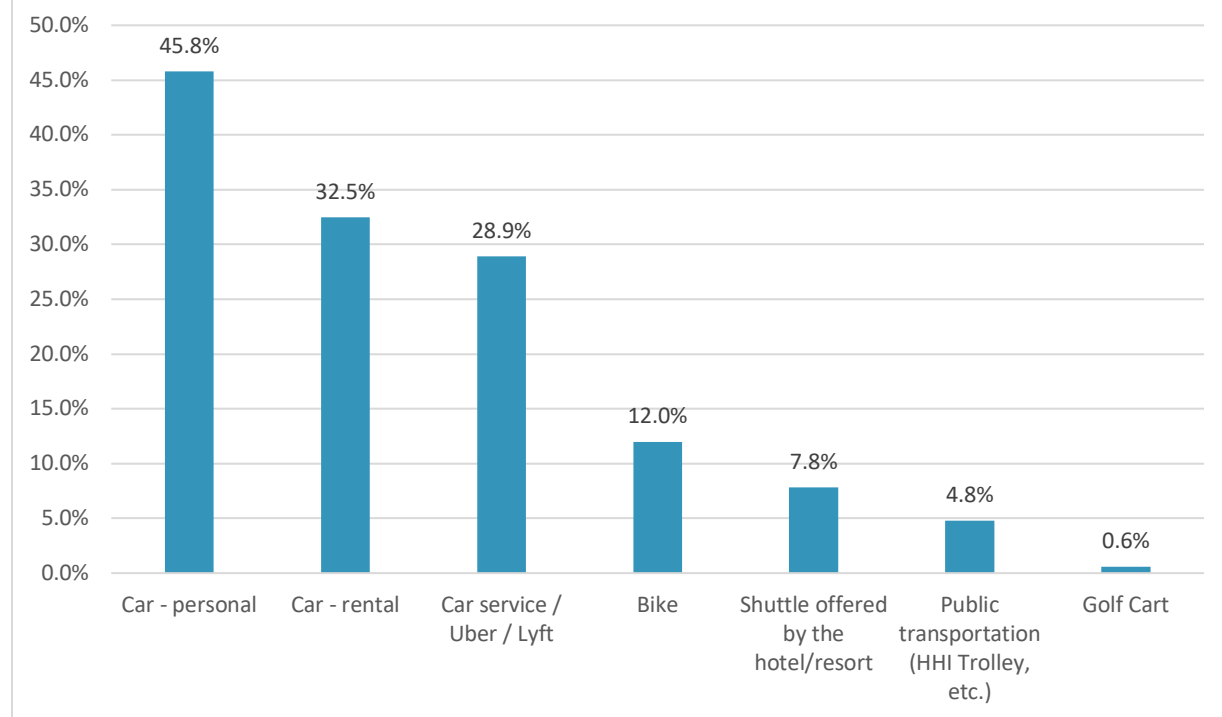
Which commercial airline did you use?

<b>American Airlines</b>	36.9%
<b>Air Canada</b>	18.5%
<b>Alaska</b>	9.2%
<b>Allegiant</b>	7.7%
<b>JetBlue</b>	7.7%
<b>Breeze</b>	6.2%
<b>Delta</b>	6.2%
<b>United</b>	3.1%
<b>Silver Airways</b>	3.1%
<b>Southwest</b>	1.5%
<b>N</b>	65

TABLE 22: Commercial Airlines Used

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

Figure 12: Transportation while in Bluffton



<b>Car - personal</b>	45.8%
<b>Car - rental</b>	32.5%
<b>Car service</b>	17.5%
<b>Bike</b>	12.0%
<b>Uber</b>	8.4%
<b>Shuttle offered by the hotel/resort</b>	7.8%
<b>Public transportation (HHI Trolley, etc.)</b>	4.8%
<b>Lyft</b>	3.0%
<b>Golf Cart</b>	0.6%
<b>N</b>	166

TABLE 23: Transportation Used While In Bluffton

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

	Overnight	Day Trip	Overall
Transportation	\$193.86	\$59.28	\$175.29
Lodging	\$473.64	\$0.00	\$473.64
Food - Dining	\$363.57	\$92.44	\$327.69
Food - Grocery	\$118.67	\$63.89	\$116.40
Shopping	\$448.31	\$159.69	\$413.87
Spas	\$92.64	\$66.72	\$97.27
Golf	\$97.17	\$9.31	\$98.54
Biking	\$44.60	\$4.58	\$40.44
Performance/Visual Arts	\$74.84	\$8.83	\$65.17
Festivals	\$66.83	\$10.92	\$58.30
Museums/Historical Tours	\$75.23	\$14.58	\$67.45
Boating/Sailing/Fishing	\$118.80	\$7.50	\$102.11
Nature-based Activities	\$52.45	\$14.33	\$48.12
Dolphin Tours	\$63.61	\$5.78	\$55.32
Tennis	\$63.84	\$4.92	\$55.30
Other Expenses	\$158.91	\$9.06	\$136.82
<b>Total Expenditure</b>	<b>\$2,506.97</b>	<b>\$531.83</b>	<b>\$2,331.73</b>

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

What are the three primary reasons why you visited Bluffton?

	Overnight	Day Trip
Beaches	33.1%	53.6%
Heritage attractions / Museum / Historical tours	22.3%	25.0%
Time with family/friends	22.3%	21.4%
Relaxation	21.7%	-
Boating / Sailing / Kayaking	21.1%	7.1%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	16.9%	3.6%
Biking	15.7%	14.3%
Business trip (convention, meeting, etc.)	15.1%	10.7%
Shopping	14.5%	28.6%
Culinary	12.0%	32.1%
Golf	11.4%	3.6%
Attend sporting event	10.2%	25.0%
Health/wellness/fitness	10.2%	7.1%
Festivals	7.8%	3.6%
Parks	5.4%	7.1%
Museum/historical tours	4.8%	7.1%
Tennis	2.4%	3.6%
Wedding	2.4%	-
Performance/visual arts	-	3.6%
N	166	28

TABLE 25: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	Overnight	Day Trip
Beaches	40.4%	42.9%
Relaxation	25.9%	35.7%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	24.1%	-
Time with family/friends	24.1%	35.7%
Shopping	22.3%	50.0%
Museum / Historical tours	19.3%	10.7%
Business/work	17.5%	14.3%
Culinary	17.5%	42.9%
Biking	16.9%	7.1%
Health / Wellness / Fitness	16.3%	3.6%
Attend sporting event	13.3%	14.3%
Festivals	12.7%	7.1%
Golf	12.7%	7.1%
Water excursions	11.4%	10.7%
Music or theatrical performance / Visual arts exhibit	10.2%	7.1%
Spas	5.4%	3.6%
Sports activities	5.4%	-
Tennis	5.4%	-
University visit / Education / Intellectual programs	4.2%	10.7%
Other	1.8%	-
N	166	28

TABLE 26: Activities Visitors Participated In

Which shopping locations did you visit?

	Overnight	Day Trip
<b>Downtown Bluffton</b>	48.2%	39.3%
<b>Tanger Outlets</b>	31.3%	53.6%
<b>Coligny Plaza</b>	29.5%	25.0%
<b>Harbour Town</b>	26.5%	17.9%
<b>Shelter Cove Harbour</b>	21.7%	10.7%
<b>The Shops at Sea Pines Center</b>	20.5%	7.1%
<b>Main Street Village</b>	19.3%	17.9%
<b>Shelter Cove Towne Centre</b>	18.1%	17.9%
<b>Shopping areas off 278 (Target, Kroger, Best Buy, etc.)</b>	17.5%	28.6%
<b>Buckwalter shopping areas</b>	15.7%	14.3%
<b>Village at Wexford</b>	12.7%	-
<b>South Beach Marina</b>	10.2%	3.6%
<b>Other</b>	1.2%	-
<b>None</b>	1.2%	3.6%
<b>N</b>	166	28

TABLE 27: Shopping Locations Visited

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

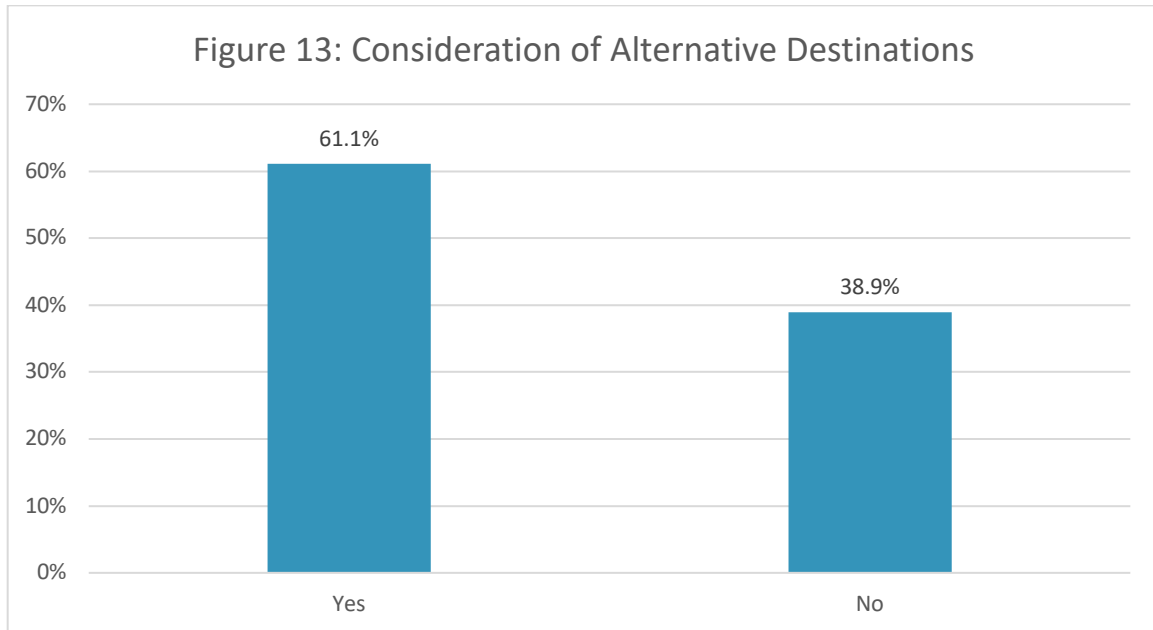
<b>Hilton Head Island</b>	50.6%
<b>Beaufort</b>	25.9%
<b>Charleston</b>	26.5%
<b>Daufuskie Island</b>	15.1%
<b>Jacksonville</b>	21.7%
<b>Savannah</b>	27.7%
<b>Tybee Island</b>	14.5%
<b>Port Royal</b>	0.6%
<b>I did not visit any other cities.</b>	4.2%
<b>N</b>	166

TABLE 28: Other Cities Visited While Staying in Bluffton



## TRAVEL PLANNING

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



Yes	61.1%
No	38.9%
N	193

TABLE 29: Consideration of alternative destinations

Which of the following destinations did you consider visiting?

Hawaiian Islands	44.1%
Alabama Golf Trail	36.4%
Gulf Shores, AL	33.9%
Isle of Palms, SC	30.5%
Orlando, FL	27.1%
Savannah, GA	27.1%
Pinehurst, NC	27.1%
Caribbean	27.1%
Aspen, CO	22.0%
Ponte Vedre, FL	19.5%
Reynolds Plantation, GA	19.5%
Outer Banks, NC	19.5%
Telluride, CO	19.5%
Sea Island, GA	18.6%
Marco Island/Naples, FL	17.8%
Kiawah Island, SC	17.8%
Sandestin, FL	16.9%
Charleston, SC	16.9%
Jekyll Island, GA	15.3%
Napa/Sonoma, CA	15.3%
Sanibel Island, FL	14.4%
Sarasota, FL	11.9%
St. Simons Island, GA	11.9%
Other (please specify)	10.2%
Hilton Head, SC	9.3%
Myrtle Beach, SC	9.3%
Tampa/St. Petersburg, FL	7.6%
Tybee Island, GA	7.6%
The Florida Keys	6.8%
Santa Fe, NM	6.8%
<b>Total</b>	<b>118</b>

TABLE 30: Alternative Destinations by Year

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

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

TABLE 31: Reasons for Visiting Hilton Head Island

How likely are you to return to Bluffton?

Very likely	59.4%
Likely	26.4%
Neutral	12.3%
Unlikely	0.9%
Very Unlikely	0.9%
<b>Total</b>	<b>106</b>

TABLE 32: Likelihood of Visiting Bluffton Again

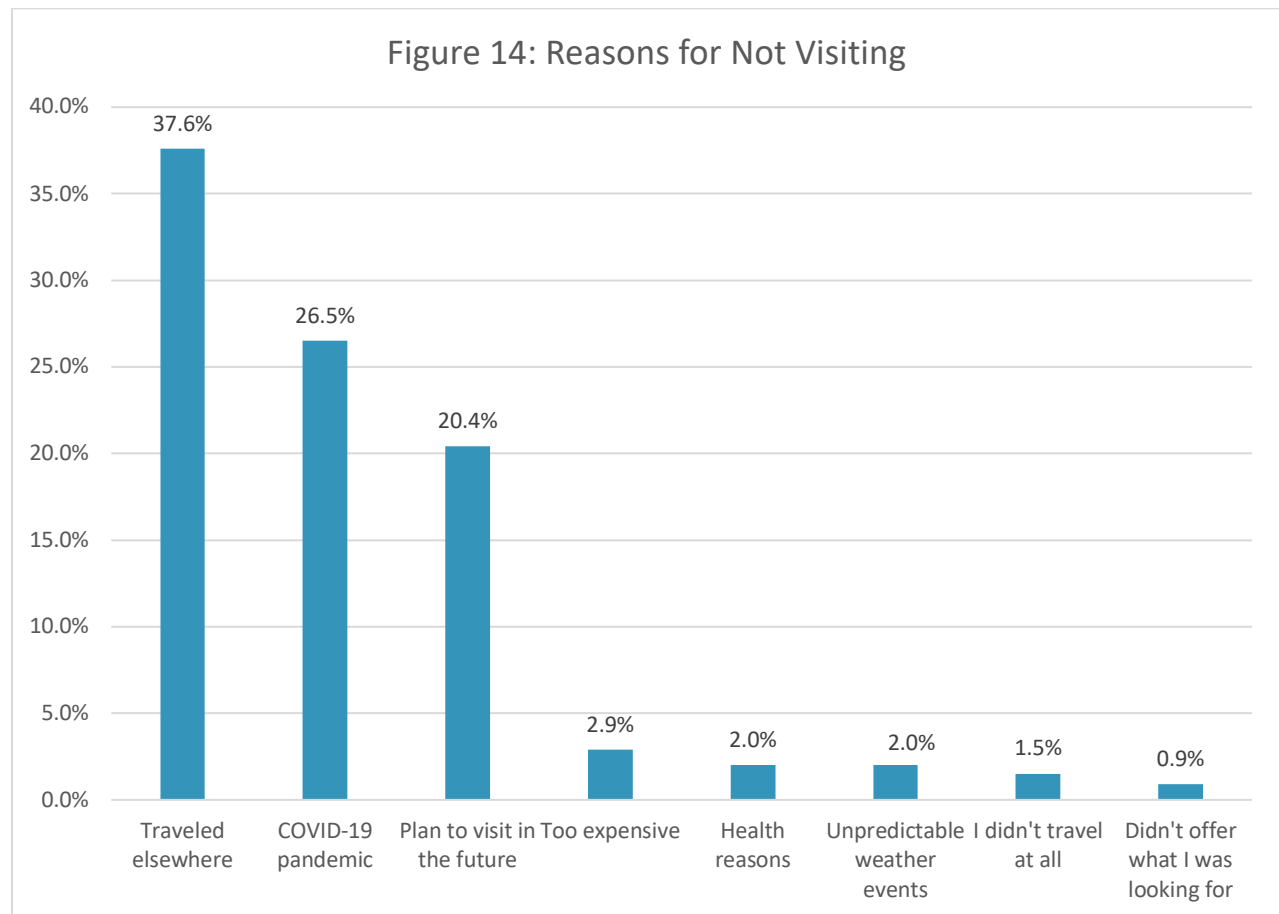
How likely are you to recommend visiting Bluffton to a friend or family member?

Definitely Recommend	70.8%
Probably Recommend	20.8%
May or May Not Recommend	7.5%
Probably Not Recommend	0.9%
Definitely Not Recommend	0.0%
<b>Total</b>	<b>106</b>

TABLE 33: Likelihood of Recommending a Visit to Bluffton

## NON-VISITORS

Which of the following most accurately reflects why you did not visit Bluffton during the last 12 months?



<b>Traveled elsewhere</b>	37.6%
<b>COVID-19 pandemic</b>	26.5%
<b>Plan to visit in the future</b>	20.4%
<b>Too expensive</b>	2.9%
<b>Health reasons</b>	2.0%
<b>Unpredictable weather events</b>	2.0%
<b>I didn't travel at all</b>	1.5%
<b>Didn't offer what I was looking for</b>	0.9%
<b>Other</b>	6.2%
<b>Total</b>	860

TABLE 34: Reasons for not visiting

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

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

TABLE 35: Regions Visited in the Past 12 Months

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

<b>1</b>	18.6%
<b>2 to 5</b>	30.2%
<b>6 to 10</b>	9.8%
<b>11 to 20</b>	1.9%
<b>21 or more</b>	0.9%
<b>Never visited</b>	38.9%
<b>Total</b>	1,027

TABLE 36: Visitation Frequency in the Past 10 Years

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

<b>Yes, within one year</b>	49.2%
<b>Yes, but not sure when</b>	42.5%
<b>No</b>	8.3%
<b>Total</b>	859

TABLE 37: Plans of visiting Hilton Head Island/Bluffton in the Future



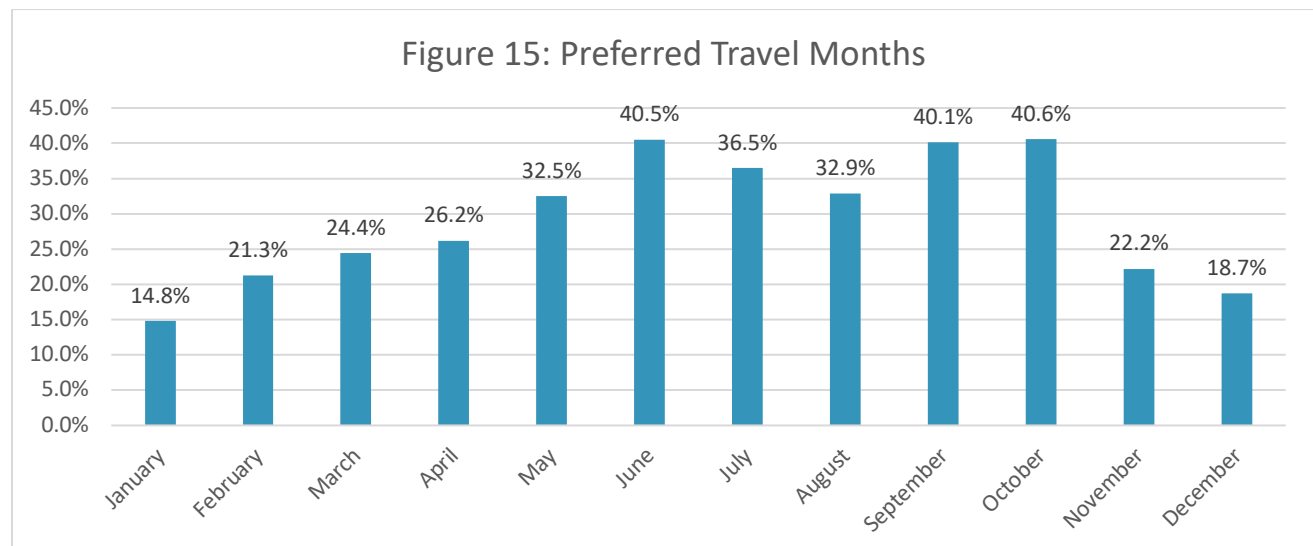
## TRAVEL BEHAVIOR – ALL RESPONDENTS

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

<b>0 to 1</b>	15.3%
<b>2 to 4</b>	55.1%
<b>5 to 7</b>	19.2%
<b>8 to 10</b>	6.3%
<b>More than 10</b>	4.1%
<b>Total</b>	<b>1,042</b>

TABLE 38: Frequency of Leisure/Vacation Trips

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



<b>January</b>	14.8%
<b>February</b>	21.3%
<b>March</b>	24.4%
<b>April</b>	26.2%
<b>May</b>	32.5%
<b>June</b>	40.5%
<b>July</b>	36.5%
<b>August</b>	32.9%
<b>September</b>	40.1%
<b>October</b>	40.6%
<b>November</b>	22.2%
<b>December</b>	18.7%
<b>Total</b>	<b>1,042</b>

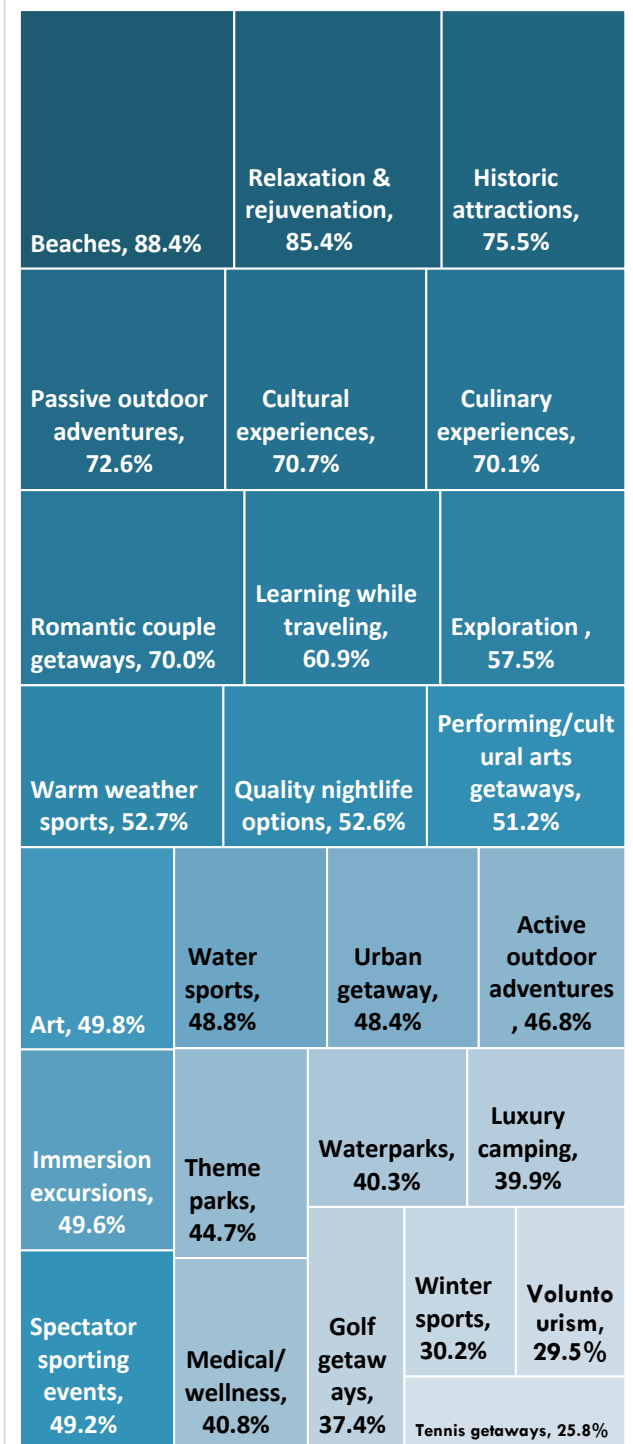
TABLE 39: Preferred Travel Months

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

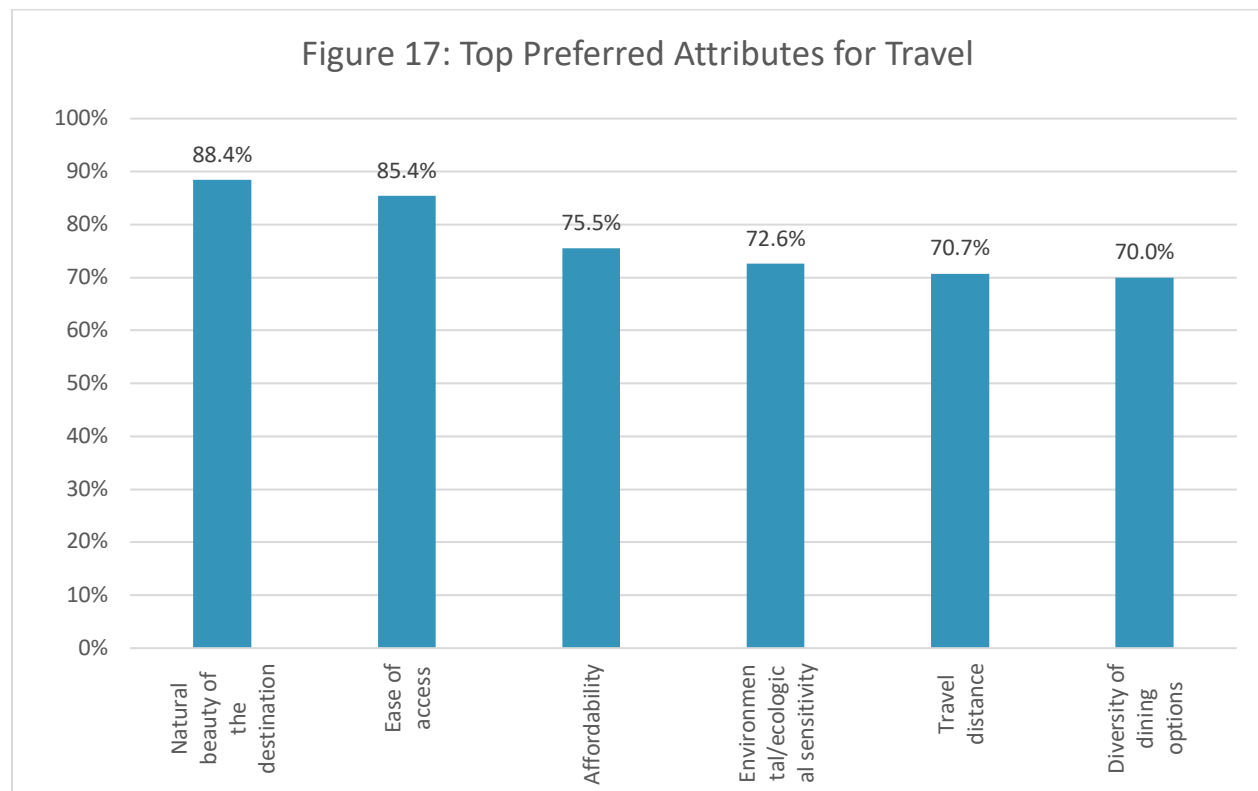
“Appealing” + “Very Appealing”	
Beaches	88.4%
Relaxation & rejuvenation	85.4%
Historic attractions	75.5%
Passive outdoor adventures	72.6%
Cultural experiences	70.7%
Culinary experiences	70.1%
Romantic couple getaways	70.0%
Learning while traveling	60.9%
Exploration	57.5%
Warm weather sports	52.7%
Quality nightlife options	52.6%
Performing/cultural arts getaways	51.2%
Spectator sporting events	49.2%
Art	49.8%
Immersion excursions	49.6%
Water sports	48.8%
Urban getaway	48.4%
Active outdoor adventures	46.8%
Theme parks	44.7%
Medical/wellness	40.8%
Waterparks	40.3%
Luxury camping	39.9%
Golf getaways	37.4%
Winter sports	30.2%
Voluntourism	29.5%
Tennis getaways	25.8%
Total	949

TABLE 40: Preferred Vacation/Leisure Travel Experiences

FIGURE 16: PREFERRED TRAVEL EXPERIENCES



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



"Important" + "Very Important"	
Natural beauty of the destination	88.4%
Ease of access	85.4%
Affordability	75.5%
Environmental/ecological sensitivity	72.6%
Travel distance	70.7%
Diversity of dining options	70.0%
Low traffic congestion	60.9%
Public transportation	57.5%
Quality of lodging options	52.7%
Activities like events/festivals	49.6%
Nightlife activity options	48.4%
Access to other cities in the surrounding area	46.8%
Quality of dining options	44.7%
Medical/wellness	37.4%
Diversity of lodging options	25.8%
<b>Total</b>	<b>949</b>

TABLE 41: Preferred Attributes for Vacation/Leisure Travel

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

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
<b>I would rather rely on a travel agent or tour operator than make my own travel arrangements.</b>	6.9%	12.8%	31.7%	30.0%	18.6%
<b>I try to support the local economy of places that I visit.</b>	34.0%	44.6%	14.2%	3.3%	3.9%
<b>N 987</b>					

TABLE 42: Travel Preferences

## APPENDIX

## ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
New York-Newark-Jersey City, NY-NJ-PA	61	7.5%
Chicago-Naperville-Elgin, IL-IN-WI	26	3.2%
Atlanta-Sandy Springs-Roswell, GA	24	3.0%
Pittsburgh, PA	20	2.5%
Washington-Arlington-Alexandria, DC-VA-MD-WV	19	2.3%
Cleveland-Elyria, OH	18	2.2%
Detroit-Warren-Dearborn, MI	16	2.0%
Los Angeles-Long Beach-Anaheim, CA	16	2.0%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	15	1.9%
Columbus, OH	14	1.7%
Boston-Cambridge-Newton, MA-NH	12	1.5%
Dallas-Fort Worth-Arlington, TX	12	1.5%
Charlotte-Concord-Gastonia, NC-SC	10	1.2%
Cincinnati, OH-KY-IN	10	1.2%
San Francisco-Oakland-Hayward, CA	10	1.2%
Kansas City, MO-KS	9	1.1%
Phoenix-Mesa-Scottsdale, AZ	9	1.1%
Houston-The Woodlands-Sugar Land, TX	8	1.0%
Indianapolis-Carmel-Anderson, IN	8	1.0%
Miami-Fort Lauderdale-West Palm Beach, FL	8	1.0%
Nashville-Davidson--Murfreesboro--Franklin, TN	8	1.0%
St. Louis, MO-IL	8	1.0%
Akron, OH	7	0.9%
Baltimore-Columbia-Towson, MD	7	0.9%
Denver-Aurora-Lakewood, CO	7	0.9%
Louisville/Jefferson County, KY-IN	7	0.9%
Minneapolis-St. Paul-Bloomington, MN-WI	7	0.9%
Omaha-Council Bluffs, NE-IA	7	0.9%
Raleigh, NC	7	0.9%
Richmond, VA	7	0.9%
Birmingham-Hoover, AL	6	0.7%
Las Vegas-Henderson-Paradise, NV	6	0.7%
Rochester, NY	6	0.7%
Seattle-Tacoma-Bellevue, WA	6	0.7%

MSA	Count	Percent
Augusta-Richmond County, GA-SC	5	0.6%
Buffalo-Cheektowaga-Niagara Falls, NY	5	0.6%
Columbia, SC	5	0.6%
Hartford-West Hartford-East Hartford, CT	5	0.6%
San Diego-Carlsbad, CA	5	0.6%
Youngstown-Warren-Boardman, OH-PA	5	0.6%
Albany-Schenectady-Troy, NY	4	0.5%
Dayton, OH	4	0.5%
Greenville-Anderson-Mauldin, SC	4	0.5%
Huntington-Ashland, WV-KY-OH	4	0.5%
Jacksonville, FL	4	0.5%
Knoxville, TN	4	0.5%
Lakeland-Winter Haven, FL	4	0.5%
Milwaukee-Waukesha-West Allis, WI	4	0.5%
New Haven-Milford, CT	4	0.5%
New Orleans-Metairie, LA	4	0.5%
Providence-Warwick, RI-MA	4	0.5%
Roanoke, VA	4	0.5%
Sacramento--Roseville--Arden-Arcade, CA	4	0.5%
Spartanburg, SC	4	0.5%
Asheville, NC	3	0.4%
Austin-Round Rock, TX	3	0.4%
Crestview-Fort Walton Beach-Destin, FL	3	0.4%
Durham-Chapel Hill, NC	3	0.4%
Fayetteville-Springdale-Rogers, AR-MO	3	0.4%
Flint, MI	3	0.4%
Greensboro-High Point, NC	3	0.4%
Lexington-Fayette, KY	3	0.4%
Muskegon, MI	3	0.4%
Myrtle Beach-Conway-North Myrtle Beach, SC-NC	3	0.4%
Niles-Benton Harbor, MI	3	0.4%
Orlando-Kissimmee-Sanford, FL	3	0.4%
Panama City, FL	3	0.4%
Salisbury, MD-DE	3	0.4%
San Jose-Sunnyvale-Santa Clara, CA	3	0.4%
Savannah, GA	3	0.4%
Syracuse, NY	3	0.4%
Tampa-St. Petersburg-Clearwater, FL	3	0.4%

MSA	Count	Percent
Toledo, OH	3	0.4%
Virginia Beach-Norfolk-Newport News, VA-NC	3	0.4%
Winston-Salem, NC	3	0.4%
Wooster, OH	3	0.4%
Worcester, MA-CT	3	0.4%
Allentown-Bethlehem-Easton, PA-NJ	2	0.2%
Barnstable Town, MA	2	0.2%
Bay City, MI	2	0.2%
Bismarck, ND	2	0.2%
Charlottesville, VA	2	0.2%
Davenport-Moline-Rock Island, IA-IL	2	0.2%
Des Moines-West Des Moines, IA	2	0.2%
Fort Collins, CO	2	0.2%
Fort Wayne, IN	2	0.2%
Gainesville, GA	2	0.2%
Grand Rapids-Wyoming, MI	2	0.2%
Gulfport-Biloxi-Pascagoula, MS	2	0.2%
Hagerstown-Martinsburg, MD-WV	2	0.2%
Harrisburg-Carlisle, PA	2	0.2%
Hickory-Lenoir-Morganton, NC	2	0.2%
Jackson, MS	2	0.2%
Kill Devil Hills, NC	2	0.2%
Kingsport-Bristol-Bristol, TN-VA	2	0.2%
Macon, GA	2	0.2%
Madison, IN	2	0.2%
Memphis, TN-MS-AR	2	0.2%
Naples-Immokalee-Marco Island, FL	2	0.2%
Norwich-New London, CT	2	0.2%
Ocean City, NJ	2	0.2%
Portland-Vancouver-Hillsboro, OR-WA	2	0.2%
Reading, PA	2	0.2%
Rural Alabama	2	0.2%
Rural Georgia	2	0.2%
Rural Indiana	2	0.2%
Rural North Carolina	2	0.2%
Rural Virginia	2	0.2%
Saginaw, MI	2	0.2%
Salt Lake City, UT	2	0.2%

MSA	Count	Percent
San Antonio-New Braunfels, TX	2	0.2%
San Luis Obispo-Paso Robles-Arroyo Grande, CA	2	0.2%
Scranton--Wilkes-Barre--Hazleton, PA	2	0.2%
Seneca, SC	2	0.2%
Sevierville, TN	2	0.2%
Spokane-Spokane Valley, WA	2	0.2%
Springfield, MA	2	0.2%
Springfield, MO	2	0.2%
Torrington, CT	2	0.2%
Alamogordo, NM	1	0.1%
Albany, GA	1	0.1%
Athens-Clarke County, GA	1	0.1%
Austin, MN	1	0.1%
Bainbridge, GA	1	0.1%
Baton Rouge, LA	1	0.1%
Blacksburg-Christiansburg-Radford, VA	1	0.1%
Bloomington, IL	1	0.1%
Bridgeport-Stamford-Norwalk, CT	1	0.1%
Burlington-South Burlington, VT	1	0.1%
Canton-Massillon, OH	1	0.1%
Cape Coral-Fort Myers, FL	1	0.1%
Carbondale-Marion, IL	1	0.1%
Chambersburg-Waynesboro, PA	1	0.1%
Champaign-Urbana, IL	1	0.1%
Charleston-North Charleston, SC	1	0.1%
Charleston, WV	1	0.1%
Chattanooga, TN-GA	1	0.1%
Columbus, GA-AL	1	0.1%
Concord, NH	1	0.1%
Corning, NY	1	0.1%
Corpus Christi, TX	1	0.1%
Crossville, TN	1	0.1%
Dalton, GA	1	0.1%
Decatur, AL	1	0.1%
Deltona-Daytona Beach-Ormond Beach, FL	1	0.1%
East Stroudsburg, PA	1	0.1%
Eau Claire, WI	1	0.1%
El Paso, TX	1	0.1%



MSA	Count	Percent
Erie, PA	1	0.1%
Eureka-Arcata-Fortuna, CA	1	0.1%
Fargo, ND-MN	1	0.1%
Forrest City, AR	1	0.1%
Fresno, CA	1	0.1%
Gardnerville Ranchos, NV	1	0.1%
Glens Falls, NY	1	0.1%
Grand Forks, ND-MN	1	0.1%
Grand Junction, CO	1	0.1%
Greeley, CO	1	0.1%
Green Bay, WI	1	0.1%
Greenwood, SC	1	0.1%
Harrison, AR	1	0.1%
Hilo, HI	1	0.1%
Holland, MI	1	0.1%
Hutchinson, MN	1	0.1%
Idaho Falls, ID	1	0.1%
Ionia, MI	1	0.1%
Jackson, MI	1	0.1%
Jackson, OH	1	0.1%
Jackson, TN	1	0.1%
Jacksonville, TX	1	0.1%
Juneau, AK	1	0.1%
Kalamazoo-Portage, MI	1	0.1%
Kalispell, MT	1	0.1%
Kerrville, TX	1	0.1%
Kingsville, TX	1	0.1%
Laconia, NH	1	0.1%
Lafayette-West Lafayette, IN	1	0.1%
LaGrange, GA	1	0.1%
Lake Havasu City-Kingman, AZ	1	0.1%
Lancaster, PA	1	0.1%
Lansing-East Lansing, MI	1	0.1%
Las Cruces, NM	1	0.1%
Lewiston, ID-WA	1	0.1%
Logan, UT-ID	1	0.1%
London, KY	1	0.1%
Lufkin, TX	1	0.1%

MSA	Count	Percent
Lynchburg, VA	1	0.1%
Madison, WI	1	0.1%
Madisonville, KY	1	0.1%
Manchester-Nashua, NH	1	0.1%
Marion, NC	1	0.1%
Marion, OH	1	0.1%
Marquette, MI	1	0.1%
Menomonie, WI	1	0.1%
Milledgeville, GA	1	0.1%
Modesto, CA	1	0.1%
Morristown, TN	1	0.1%
New Bern, NC	1	0.1%
New Castle, IN	1	0.1%
New Castle, PA	1	0.1%
New Ulm, MN	1	0.1%
Newport, OR	1	0.1%
Ocala, FL	1	0.1%
Ogden-Clearfield, UT	1	0.1%
Oklahoma City, OK	1	0.1%
Oshkosh-Neenah, WI	1	0.1%
Ottawa-Peru, IL	1	0.1%
Palatka, FL	1	0.1%
Palm Bay-Melbourne-Titusville, FL	1	0.1%
Pittsfield, MA	1	0.1%
Plattsburgh, NY	1	0.1%
Pontiac, IL	1	0.1%
Port Clinton, OH	1	0.1%
Port St. Lucie, FL	1	0.1%
Portsmouth, OH	1	0.1%
Rapid City, SD	1	0.1%
Raymondville, TX	1	0.1%
Reno, NV	1	0.1%
Riverside-San Bernardino-Ontario, CA	1	0.1%
Rockford, IL	1	0.1%
Rocky Mount, NC	1	0.1%
Rome, GA	1	0.1%
Rural Alaska	1	0.1%
Rural Arkansas	1	0.1%

MSA	Count	Percent
Rural Colorado	1	0.1%
Rural Florida	1	0.1%
Rural Illinois	1	0.1%
Rural Maine	1	0.1%
Rural Maryland	1	0.1%
Rural Michigan	1	0.1%
Rural Minnesota	1	0.1%
Rural Nebraska	1	0.1%
Rural South Carolina	1	0.1%
Rural Texas	1	0.1%
Salem, OH	1	0.1%
Sandpoint, ID	1	0.1%
Sandusky, OH	1	0.1%
Santa Fe, NM	1	0.1%
Santa Maria-Santa Barbara, CA	1	0.1%
Shelby, NC	1	0.1%
Shreveport-Bossier City, LA	1	0.1%
Somerset, PA	1	0.1%
St. Joseph, MO-KS	1	0.1%
St. Marys, GA	1	0.1%
State College, PA	1	0.1%
Stockton-Lodi, CA	1	0.1%
Summerville, GA	1	0.1%
Tallahassee, FL	1	0.1%
Terre Haute, IN	1	0.1%
The Villages, FL	1	0.1%
Tiffin, OH	1	0.1%
Trenton, NJ	1	0.1%
Truckee-Grass Valley, CA	1	0.1%
Tucson, AZ	1	0.1%
Tulahoma-Manchester, TN	1	0.1%
Tulsa, OK	1	0.1%
Urbana, OH	1	0.1%
Utica-Rome, NY	1	0.1%
Valdosta, GA	1	0.1%
Wahpeton, ND-MN	1	0.1%
Wapakoneta, OH	1	0.1%
Warsaw, IN	1	0.1%

MSA	Count	Percent
Washington, NC	1	0.1%
Watertown-Fort Drum, NY	1	0.1%
Waycross, GA	1	0.1%
Wheeling, WV-OH	1	0.1%
Whitewater-Elkhorn, WI	1	0.1%
Wichita, KS	1	0.1%





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