Hilton Head Island

South Carolina

Visitor Profile Survey

2020

Prepared for:
Visitors and Convention Bureau and
Hilton Head Island–Bluffton Chamber of Commerce

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EXECUTIVE SUMMARY

Of those surveyed 12.5% indicated to have visited Hilton Head Island, SC for the first time, suggesting that the destination continues to appeal to new audiences. The biggest demographic by age represented in this report are the Baby Boomers with 50.3%, followed by the GenX (42.2%) and Millennials (6.8%). 58.4% of those surveyed, indicated to have a Bachelors degree or higher and more than 45.4% indicated to have an annual household income of $100,000 and more per year, both continue to increase. Year-over-year comparisons continue to show a trend towards older travelers visiting the area, even though the Millennial visitation increased by .01%, visitation by GenX decreased by 2%, and Baby Boomers visitation increased by 2% (2018/2020).

Point of origin

For all those surveyed a total of N = 1,556 useable ZIP Codes were collected, representing 317 geographical areas/MSAs (Metropolitan Statistical Areas) throughout the US, stretching from the east to west coast.

Ohio remains the number one origin for Hilton Head Island travelers (13.2%), followed by Georgia (9.6%) and Pennsylvania (7.8%). A large portion of travelers seemed to be instate visitors (SC 7.2%), followed by North Carolina and New York (each 6.4%), Florida and Tennessee with 5.3% and 3.9% respectively.

According to market penetration analysis the following MSA were major markets for Hilton Head Island: Cleveland-Elyria-Mentor, OH; Augusta-Richmond County, GA and Atlanta-Sandy Springs-Marietta, GA. Followed by Columbia, SC; Charlotte-Gastonia-Concord, NC-SC; Cincinnati, OH; Columbus, OH and Knoxville, TN.

Canada remains to be the top international origin for Hilton Head Island travelers (52%), followed by Europe (25.4%) and Central America (8.5%).

Those who traveled to Hilton Head Island

The top three reasons for choosing Hilton Head Island as a destination remain to be visiting beaches (73.5%), relaxation (58.6%) and spending time with family (48.4%). Followed by golf (16.3%), biking (15.7%) and culinary experiences (14%). Activities visitors actually participated in, are similar to the previous ones, including shopping, nature-based activities and water excursions.

The peak season for visitation to Hilton Head Island of those people surveyed, was between June and October. November seemed to be a bit weaker, with December and January stronger.

Visitor estimates measured by the Lowcountry and Resort Islands Tourism Institute at USCB, differ slightly compared to the travel time periods of those surveyed. Calculations suggest an increase of visitation for the spring, with an robust average growth of 5% between January and May. Between June and December, visitation remained flat (0.2%) with a decrease of visitations in July, August and November, and an increase for September, October and December.

About 87.5% of those who travelled to Hilton Head Island are repeat visitors.

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EXECUTIVE SUMMARY

Trip characteristics

The average group size of those surveyed was 2.93, and slightly decreased from 2018 (2.97). The main mode of transportation to the island remained to be the personal/family car (79.5%). However, flying into the destination increased significantly between 2018 and 2020 from 16% to 19.5%, with an increase of more than five percentage points, of flying into Hilton Head Island airport (7% 2018, to 12.8% 2020). While *on* the island, the usage of public transportation increased significantly by 5% between 2018 and 2020.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.9 nights, hotel visitors 4.2 nights, and timeshare visitors and second home owners 7.7 nights per trip.

Villa/condo rental remains to be the most popular choice of accommodation for overnight visitors (30%). A decrease for timeshare visitors (25%) was concurrent to an increase for home rentals (9.5%, from 7.5% in 2018) and full service hotels/resorts (12.7%, from 10% in 2018).

Travel planning

VRBO remains by far the most popular online booking platform (33%) for those surveyed, followed by local vacation rental companies (28%) and the local resort online booking platforms (e.g. Sea Pines, Palmetto Dunes) 11.2%. Other destinations like Myrtle Beach, SC, Outer Banks, NC, The Florida Keys, FL and Tybee Island, GA remain competitors for Hilton Head Island as a beach destination. The top city competing markets were Savannah, GA and Charleston, SC.

Top reasons for returning to Hilton Head Island were previous visitation (80.3%), beach destination (48.3%), word of mouth/recommendation (18.2%), visit nature based attractions (11%), and visit heritage attractions (4.6%).

98.8% of those surveyed indicated an intend to return to visit Hilton Head Island.

EXECUTIVE SUMMARY

Non−visitors

Of those, who indicated not to have traveled to Hilton Head Island in the past 18 months (N = 739), just 33% have never visited Hilton Head Island before, roughly 60% visited 1-5 times before. Of those who never visited the area before, 92.6% considered visiting Hilton Head Island.

Of those non-visitors 68% traveled elsewhere, 10% found it too expensive, 7.2% did not travel at all, 4.2% mentioned health reasons, roughly 3% did not find what they were looking for and 2.6% were hesitant because of unpredictable weather events. Of those who did not visit Hilton Head Island went instead to Florida, North Carolina or visited destinations even further north at the Atlantic coast. About 28% indicated to have plans to visit Hilton Head Island within one year.

Of those who did not visit, resort hotels (48.8%) are their top choice of accommodation while on vacation, followed by luxury hotels/inn (32.4%), home rentals (27.2%), villa rentals (27.0%) and/or timeshares (23.7%).

The top five things travelers were interested in for leisure trips/vacation were: beaches (95%) relaxation & rejuvenation (94%), historical attractions (84%), passive outdoor adventures (82%), cultural and culinary experiences (74% and 73%), romantic couple-getaways (71%), warm weather sports (63%) and performing/cultural arts getaways (52%).

For a visit to Hilton Head Island the following attributes were important: natural beauty of the destination (97%), quality of lodging and dining options (96% and 93%), affordability (91%), diversity of dining and lodging options (89% and 77%), ease of access (88%), low traffic congestion (67%) and activities like events/festivals (64%).

Methodology

Survey implementation

The 2019 Visitor Profile Study (VPS) for Hilton Head Island was conducted electronically. Between January 28th and February 14th 30,000 emails have been send to invite individuals (who have previously visited www.hiltonhead-island.org and submitted their email address) to participate in the VPS. A total of 1,696 completed surveys were collected (5.8% response rate). Findings presented in this report are based on the total responses collected (N = 1,696).

This report presents the results of the 2020 study, as well as for the previous year 2018 this study was conducted. Throughout this report, if data is not presented, it is because the question was not asked in the previous year.

The table below shows the visitor estimates for Hilton Head Island by segment for 2018 and 2019. The estimates are cumulative and based on secondary data for hotel, timeshare and villa visitors 2019, as well as estimates based on primary data collected for Second Homeowners and their visitors (2014) and Daytrippers (2013).

Visitor segment	2018	2019	YoY Change in %
Number of Villa Visitors	720,666	755,953	4.9%
Number of Hotel Visitors	459,603	473,679	3.1%
Number of Timeshare Visitors	456,070	454,093	-0.4%
Number of Secondhome Owner Visitors	598,777	613,216	2.4%
Second Homeowner Non-Paying Guests	159,137	159,137	0.0%
Daytrippers (10% of all visitors -not incl. secondhome owner guests)	223,512	228,250	2.1%
Total Visitors	2,617,764	2,684,328	2.5%

Table 1: Visitor estimates 2018 and 2019

Survey findings

Demographics

	2018	2020
Gender		
Female	64.2%	67.4%
Male	35.8%	32.6%
Marital Status		
Married	78.5%	76.7%
Single	6.8%	8.5%
Divorced	6.7%	7.4%
Living as Married	3.9%	3.8%
Widowed	3.5%	3.1%
Separated	0.5%	0.5%
Education		
Grade School	0.3%	0.2%
High School	8.3%	8.0%
Some College	18.7%	19.6%
Associates Degree (2 years)	13.9%	13.1%
Bachelors Degree (4 years)	31.6%	31.5%
Graduate Degree (Post degree/MA)	26.2%	26.9%
Not Applicable	1.1%	0.7%
Age		
19 years or younger	0.1%	0.1%
20 to 29 years	0.8%	0.9%
30 to 39 years	5.9%	5.9%
40 to 49 years	15.9%	15.3%
50 to 59 years	28.3%	26.8%
60 to 69 years	33.9%	34.4%
70 years and over	14.4%	15.9%
Not applicable	0.8%	0.6%
Household Income		
Under $24,999	1.5%	1.4%
$25,000-$34,999	3.0%	1.8%
$35,000-$49,999	5.0%	5.5%
$50,000-$74,999	12.5%	12.6%
$75,000-$99,999	16.1%	14.6%
$100,000-$149,999	22.9%	22.1%
$150,000-$199,999	11.3%	11.3%
$200,000-$249,999	4.1%	5.8%
$250,000 or more	6.0%	6.2%
Not Applicable	17.7%	18.8%
N	1,690	1,682

Table 2: Demographics

Point of origin

ZIP code analysis - Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA share	Percent share - Arbitron	Percent share - Nielsen	Percent share - Scarbarough
1	Cleveland-Elyria-Mentor, OH MSA	55	3.6%	1.4%	0.1%	0.0%
2	Augusta-Richmond County, GA-SC MSA	26	1.7%	1.2%	1.1%	1.7%
3	Atlanta-Sandy Springs-Marietta, GA MSA	99	6.5%	0.9%	1.3%	0.3%
4	Canton-Massillon, OH MSA	13	0.9%	0.9%	0.9%	0.9%
5	Columbia, SC MSA	19	1.2%	0.6%	0.4%	1.2%
6	Charlotte-Gastonia-Concord, NC-SC MSA	47	3.1%	0.6%	0.6%	0.7%
7	Cincinnati-Middletown, OH-KY-IN MSA	42	2.8%	0.5%	0.7%	0.0%
8	Columbus, OH MSA	35	2.3%	0.4%	0.2%	-0.3%
9	Akron, OH MSA	30	2.0%	2.0%	2.0%	2.0%
10	Knoxville, TN MSA	19	1.2%	0.4%	0.0%	-0.2%
11	Pittsburgh, PA MSA	43	2.8%	0.3%	0.2%	0.3%
12	Kingsport-Bristol-Bristol, TN-VA MSA	11	0.7%	0.1%	0.0%	0.7%
13	Richmond, VA MSA	17	1.1%	-0.1%	-0.1%	-0.7%
14	Greenville, SC MSA	15	1.0%	-0.1%	-0.9%	-0.1%
15	Albany-Schenectady-Troy, NY MSA	11	0.7%	-0.3%	-0.5%	-0.4%
16	Louisville-Jefferson County, KY-IN MSA	11	0.7%	-0.5%	-0.8%	-1.3%
17	Hartford-West Hartford-East Hartford, CT MSA	11	0.7%	-0.6%	-1.6%	-1.5%
18	Indianapolis-Carmel, IN MSA	16	1.0%	-0.7%	-1.4%	-1.7%
19	Orlando-Kissimmee, FL MSA	14	0.9%	-1.0%	-2.3%	-2.2%
20	Baltimore-Towson, MD MSA	14	0.9%	-2.0%	-1.6%	-2.1%
21	Tampa-St. Petersburg-Clearwater, FL MSA	10	0.7%	-2.4%	-3.4%	-2.3%
22	Minneapolis-St. Paul-Bloomington, MN-WI MSA	13	0.9%	-2.6%	-3.0%	-3.9%
23	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	44	2.9%	-2.7%	-3.8%	-3.3%
24	Boston-Cambridge-Quincy, MA-NH MSA	31	2.0%	-3.0%	-2.6%	-3.3%
25	Detroit-Warren-Livonia, MI MSA	26	1.7%	-3.2%	-2.7%	-3.9%
26	Miami-Fort Lauderdale-Miami Beach, FL MSA	14	0.9%	-3.6%	-2.6%	-2.5%
27	Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	19	1.2%	-4.2%	-4.0%	-6.4%
28	Dallas-Fort Worth-Arlington, TX MSA	10	0.7%	-5.9%	-4.9%	-4.8%
29	Chicago-Naperville-Joliet, IL-IN-WI MSA	42	2.8%	-7.2%	-5.1%	-5.8%
30	New York-Northern New Jersey-Long Island, NY-NJ-PA	102	6.7%	-12.9%	-10.1%	-4.9%
	Other	667	43.7%			
	Total	1,526	100.0%			

Table 3: ZIP code analysis – Top 30 MSAs

Point of origin

International markets

Figure 1: International markets by year
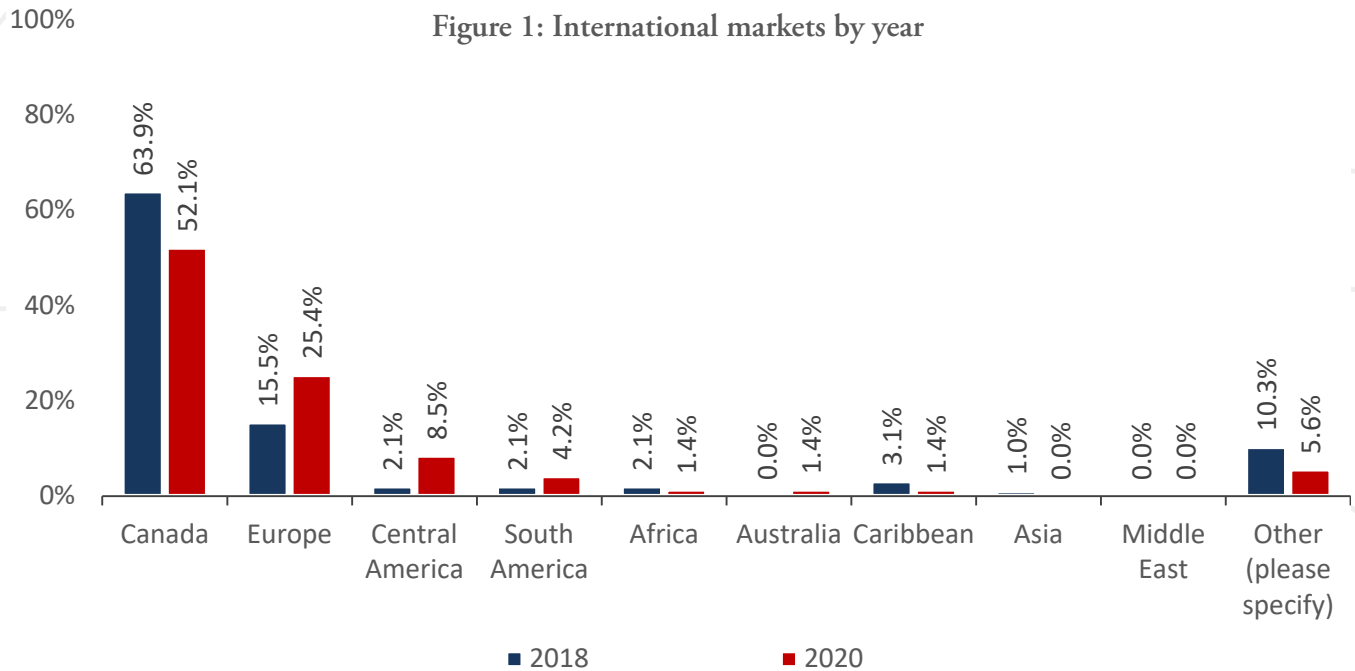
	2018	2020
Canada	63.9%	52.1%
Europe	15.5%	25.4%
Central America	2.1%	8.5%
South America	2.1%	4.2%
Africa	2.1%	1.4%
Australia	0.0%	1.4%
Caribbean	3.1%	1.4%
Asia	1.0%	0.0%
Middle East	0.0%	0.0%
Other (please specify)	10.3%	5.6%
N	91	71

Table 4: International markets by year

Travel to Hilton Head Island

Within the last 18 months have you traveled or taken a vacation?

Figure 2: Travel frequency by year
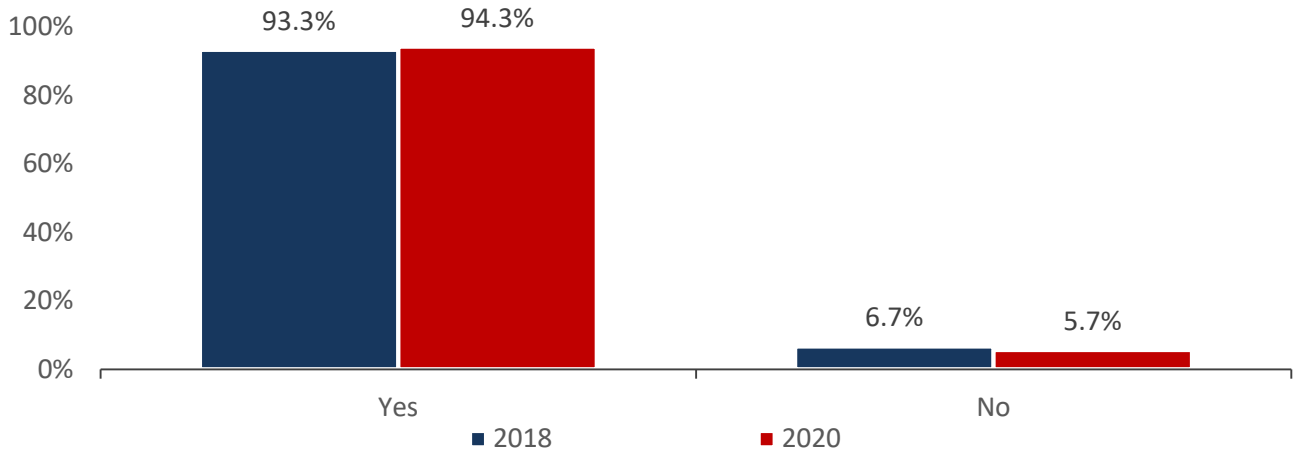
	2018	2020
Yes	93.3%	94.3%
No	6.7%	5.7%
	1,702	1,684

Table 5: Travel frequency by year

Have you visited the Hilton Head Island area in the last 18 months?

Figure 3: Hilton Head Island visitation (past 18 months) by year
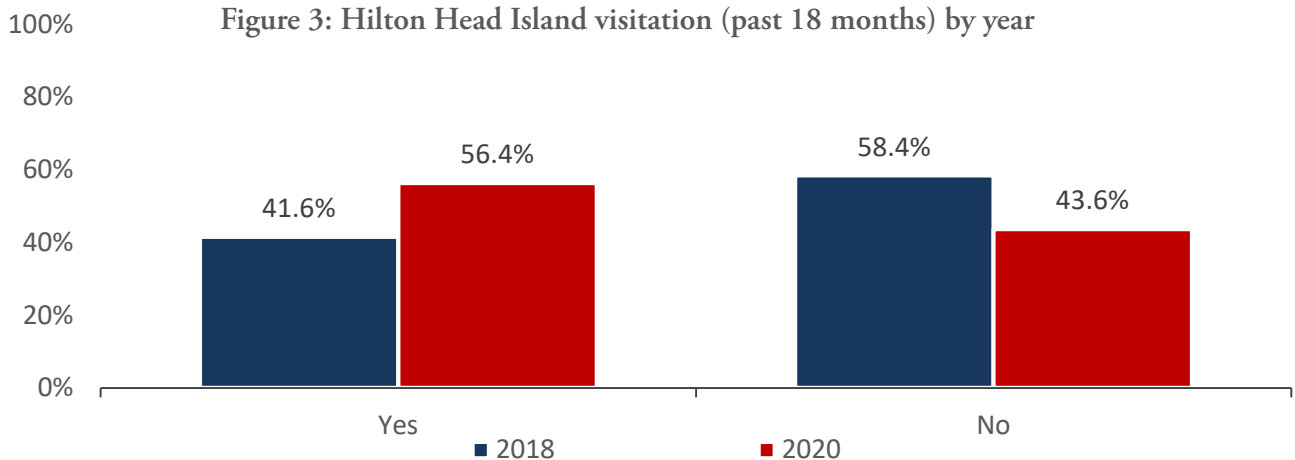
	2018	2020
Yes	41.6%	56.4%
No	58.4%	43.6%
	1,713	1,691

Table 6: Hilton Head Island visitation (past
18 months) by year

Travel to Hilton Head Island

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

	2018	2020
2016	8.6%	
2017	69.0%	
2018	22.4%	12.9%
2019		77.8%
2020		9.3%
N	710	951

Table 7: Visitation year by year

	2018	2020
January	4.8%	9.5%
February	9.3%	2.2%
March	12.3%	5.3%
April	6.6%	8.9%
May	6.9%	5.8%
June	6.6%	10.4%
July	10.3%	10.6%
August	9.7%	12.3%
September	11.4%	10.2%
October	9.6%	11.4%
November	8.3%	7.2%
December	4.1%	6.2%
N	710	951

Table 8: Visitation month by year

Figure 4: Visitation month by year
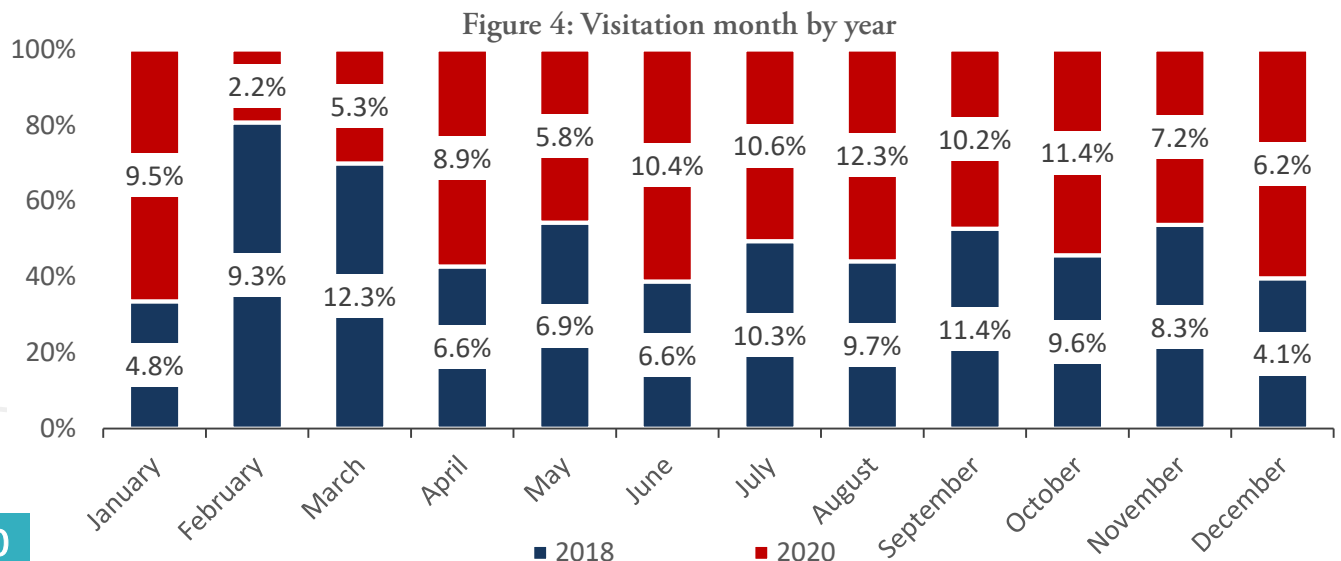
Travel to Hilton Head Island

Was that your first visit to Hilton Head Island?

Figure 5: First time visitor vs. repeat visitor by year
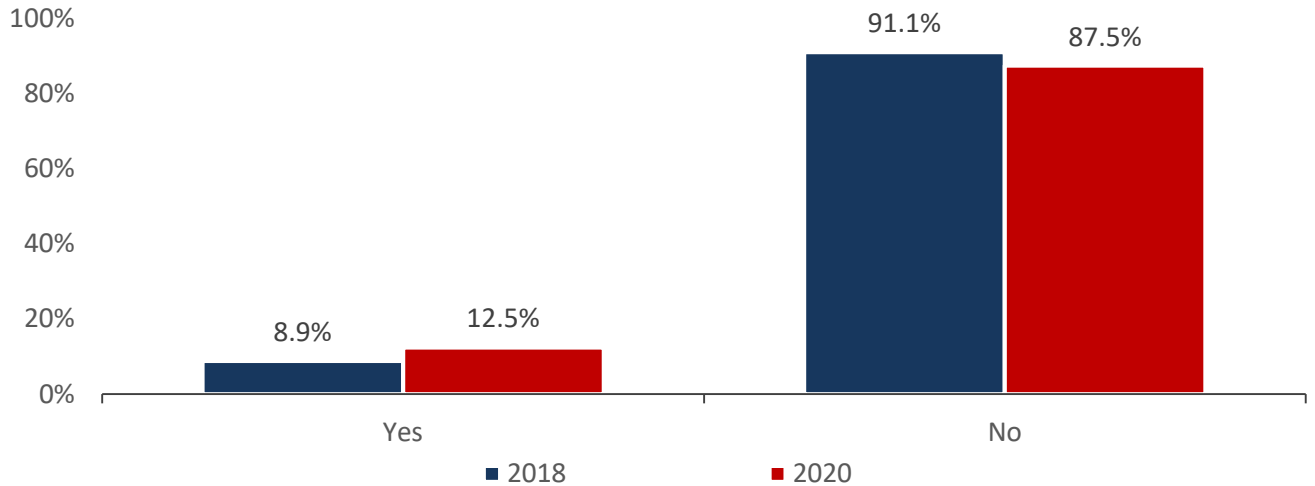
	2018	2020
Yes	8.9%	12.5%
No	91.1%	87.5%
	709	946

Table 9: First time visitor vs. repeat visitor by year

Travel to Hilton Head Island

When choosing the Hilton Head Island area as your travel destination, please name your three primary reasons:

	2018	2020
Beaches	75.6%	73.5%
Relaxation	57.9%	58.6%
Time with family	42.6%	48.4%
Golf	22.6%	16.3%
Biking	18.0%	15.7%
Culinary	15.3%	13.9%
Time with friends	11.9%	12.4%
Shopping	11.9%	11.7%
Nature-based activities (dolphin tours, fishing, etc.)	8.9%	11.3%
Festivals	3.2%	4.0%
Heritage attractions	2.5%	3.3%
Museum/historical tours	2.4%	2.5%
Tennis	2.8%	2.1%
Health/wellness/fitness	2.7%	2.1%
Boating/sailing/kayaking	1.8%	1.6%
Parks	1.1%	1.4%
Business trip (convention, meeting, etc.)	0.6%	1.2%
Music	1.3%	0.8%
Spas	0.1%	0.7%
Attend sporting event	0.6%	0.6%
Performance/visual arts	0.8%	0.6%
Art	0.4%	0.6%
University visit	0.0%	0.2%
Education/Intellectual Programs	0.3%	0.1%
Other (please specify)	7.3%	8.1%
N	712	953

Table 10: Three primary reasons for visitation
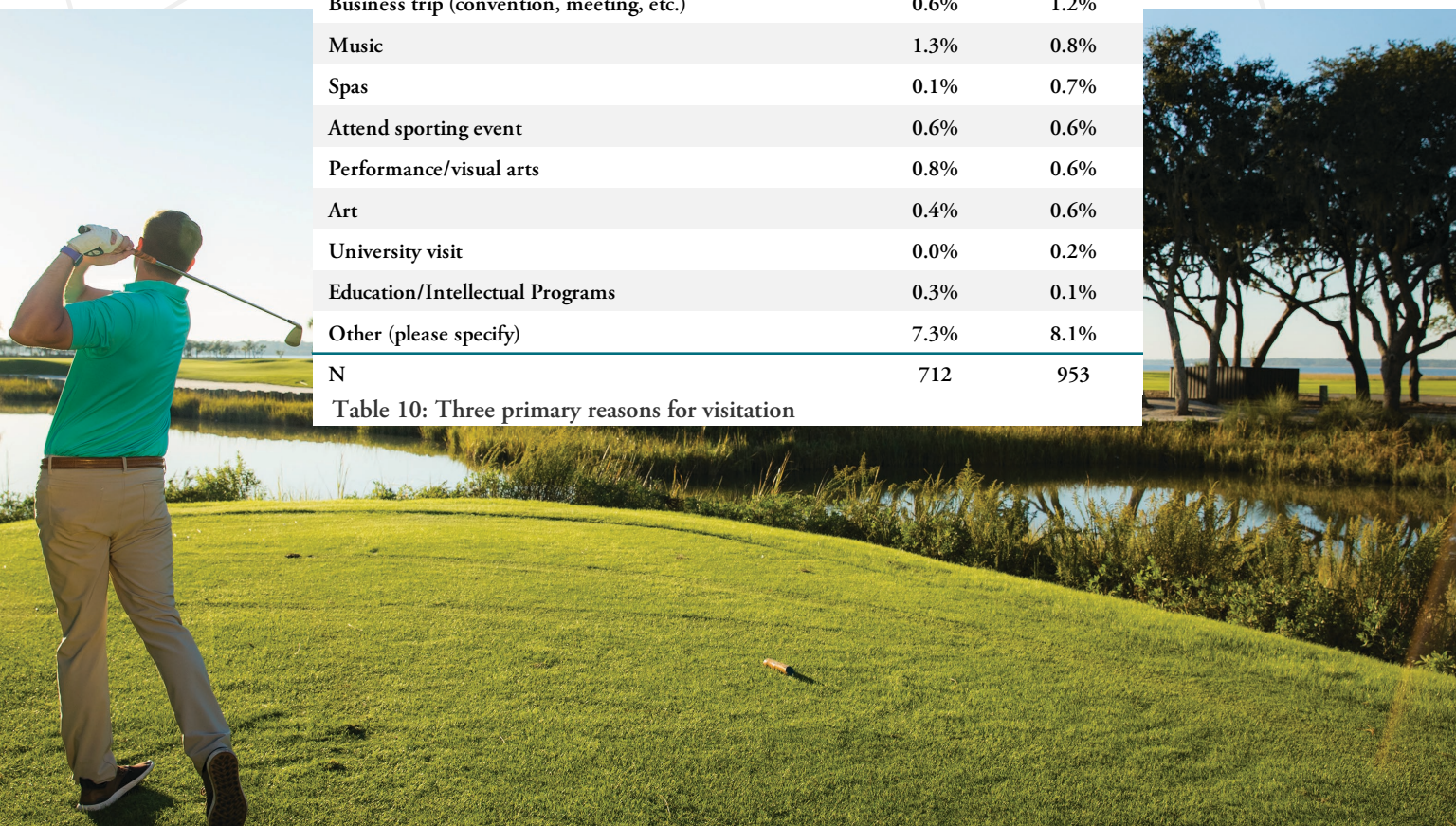
Travel to Hilton Head Island

Which of the following activities did you actively participate in, while staying?

	2018	2020
Beaches	82.6%	83.2%
Relaxation	62.8%	78.0%
Time with family/friends	56.0%	70.5%
Shopping	55.3%	69.1%
Culinary	27.4%	40.1%
Biking	36.7%	37.3%
Nature-based activities	15.3%	30.3%
Water excursions	12.9%	24.4%
Golf	23.7%	23.8%
Museum/historical tours	9.0%	17.8%
Music	6.2%	16.7%
Festivals	7.7%	13.4%
Health/wellness/fitness	6.9%	12.6%
Sports activities	3.9%	8.1%
Spas	3.8%	8.0%
Performance/visual arts	3.1%	6.3%
Tennis	5.2%	5.9%
Art	0.8%	5.6%
Education/Intellectual Programs	1.3%	2.6%
Business/work	1.4%	2.5%
Attend sporting event	0.7%	2.3%
University visit	0.1%	0.6%
Other (please specify)	2.7%	3.9%
N	712	950

Table 11: Activities travelers participated in
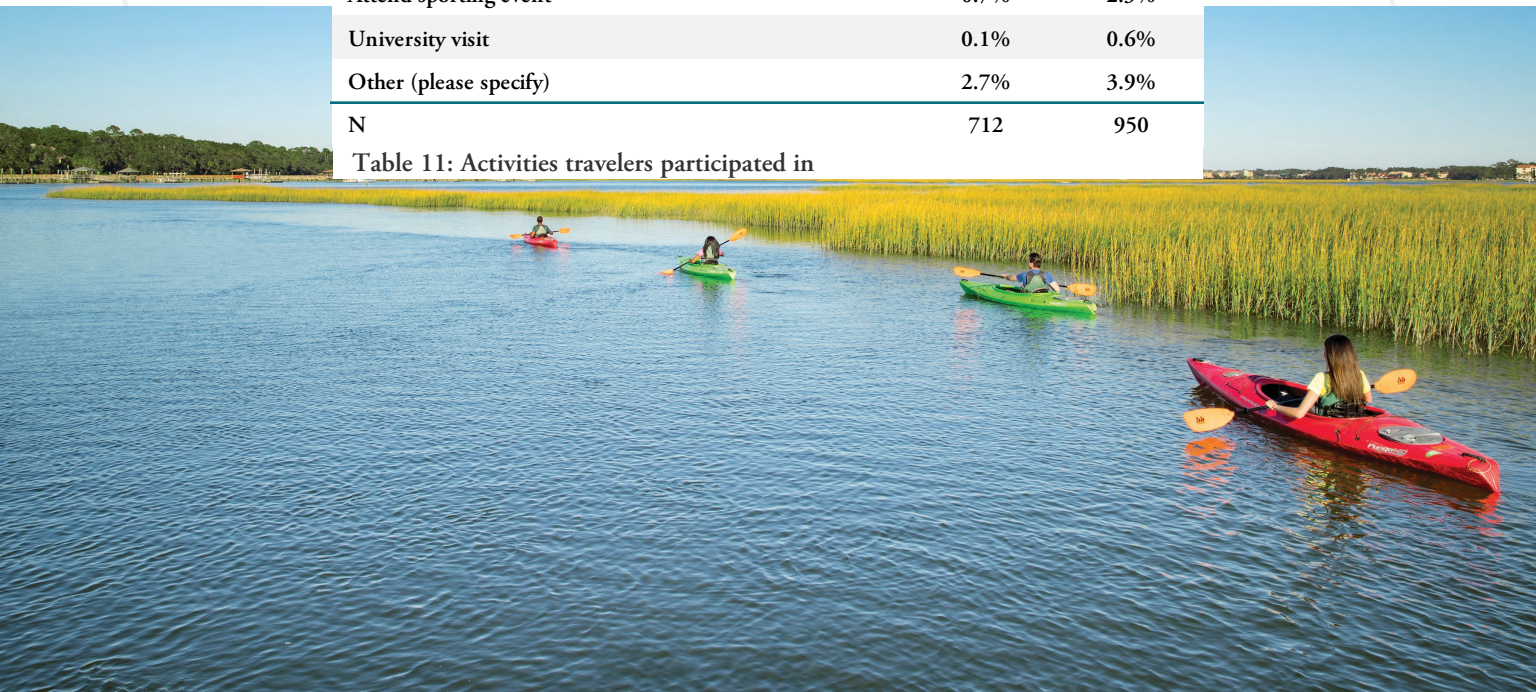
Trip characteristics

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

Figure 6: Group size by year
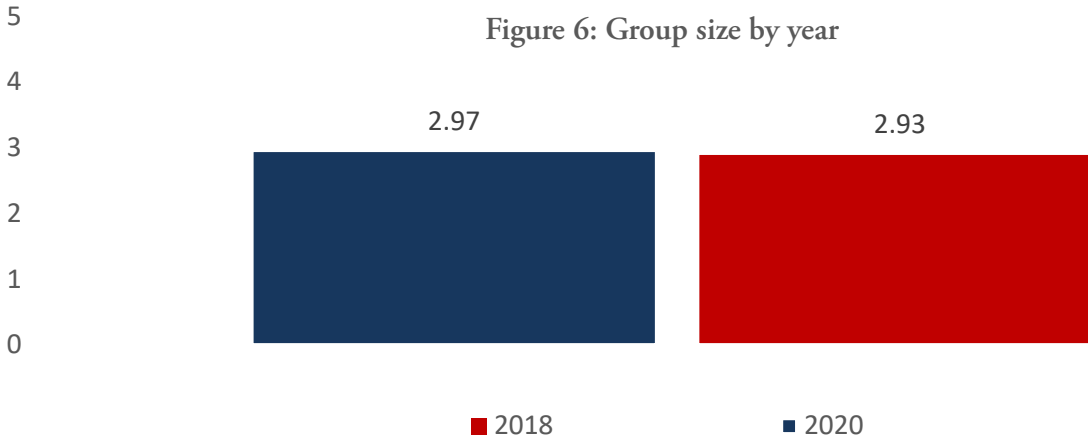
	2018	2020
Average group size	2.97	2.93
	660	860

Table 12: Group size by year

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

2020	0	1	2	3	4	5	6 and more
Under 18 years old	32.6%	23.1%	27.5%	7.9%	4.4%	2.1%	2.3%
18-24 years old	56.4%	22.8%	16.6%	1.9%	1.9%	0.0%	0.4%
25-34 years old	47.2%	21.7%	19.5%	3.8%	3.8%	0.8%	3.4%
35-44 years old	36.4%	26.5%	28.1%	4.2%	3.5%	0.3%	1.0%
45-54 years old	26.6%	31.7%	33.9%	3.1%	2.8%	0.6%	1.4%
55-64 years old	15.3%	33.1%	43.7%	3.8%	2.7%	0.0%	1.5%
65 years old or older	14.5%	28.4%	48.1%	2.5%	4.7%	0.6%	1.2%
N	765	709	866	103	91	17	41

Table 13: Group member count by age

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Trip characteristics

What type of transportation did you use to make your last trip to Hilton head Island?

	2018	2020
Car-Personal/Family	78.9%	79.5%
Plane (airline)	16.0%	19.5%
Personal plane		0.2%
Car-Rental	17.4%	14.7%
Motor Coach/Tour bus	0.4%	0.0%
Personal RV	1.1%	1.1%
Other (please specify)	0.3%	0.6%
N	712	953

Table 14: Modes of transportation to Hilton Head Island by year

Figure 7: Select modes of transportation to Hilton Head Island by year
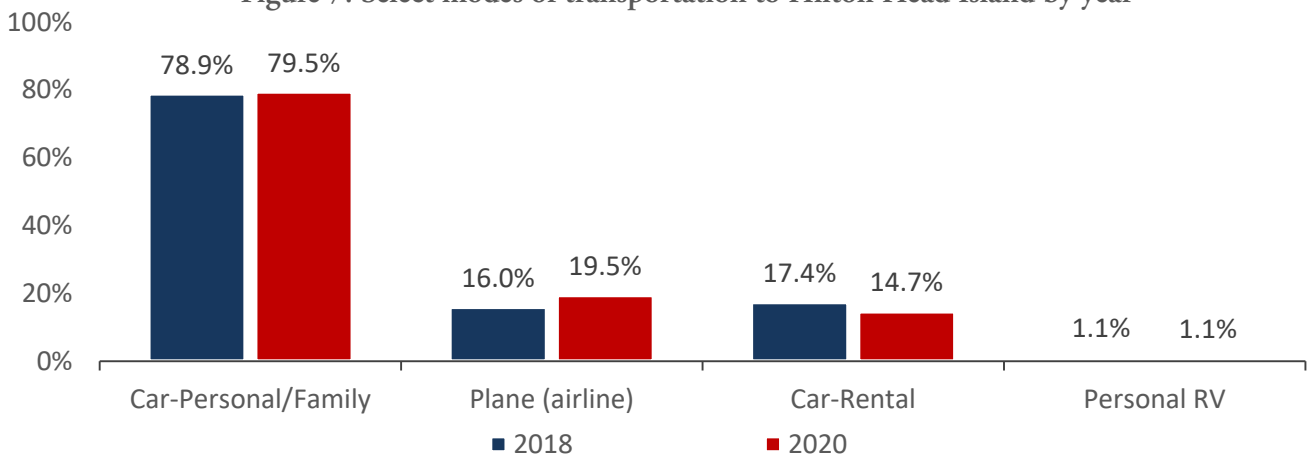
If you traveled by plane, which airport did you disembark to Hilton Head?

	2018	2020
Savannah/Hilton Head Island International	70.2%	69.5%
Hilton Head Island	7.0%	12.8%
Charleston	9.7%	9.2%
Atlanta	3.5%	2.8%
Jacksonville	0.9%	1.4%
Charlotte	0.0%	1.4%
Other (please specify)	8.8%	2.8%
N	114	141

Table 15: Air-travel to Hilton Head Island by year

Trip characteristics

Once in the Hilton Head Island area, what modes of transportation did you use? Check all that apply.

Figure 8: Select modes of transportation *while on* Hilton Head Island
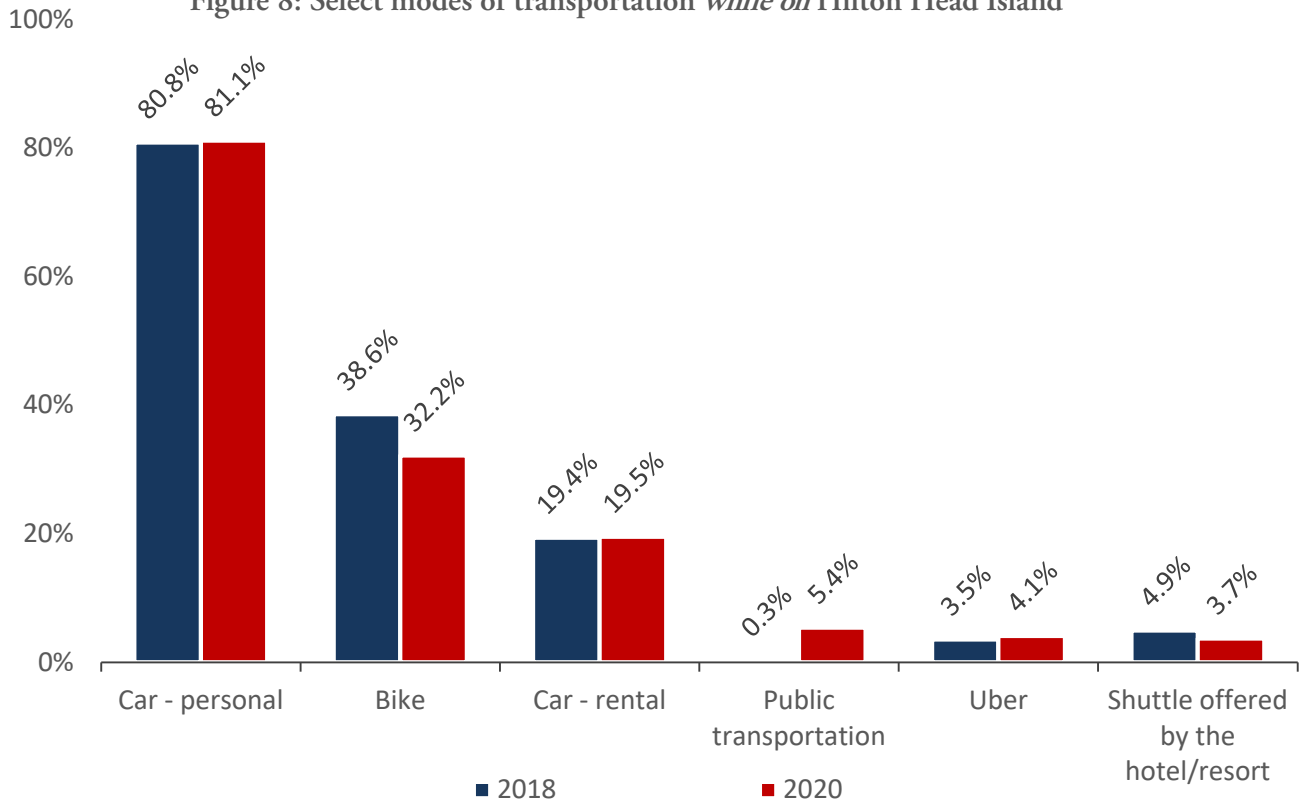
	2018	2020
Car - personal	80.8%	81.1%
Bike	38.6%	32.2%
Car - rental	19.4%	19.5%
Public transportation	0.3%	5.4%
Uber	3.5%	4.1%
Shuttle offered by the hotel/resort	4.9%	3.7%
Lyft	0.3%	1.1%
N	708	948

Table 16: Modes of transportation *while on* Hilton Head Island by year

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Trip characteristics

Approximately how many NIGHTS was your trip to the Hilton Head Island area?

Figure 9: Length of stay by year
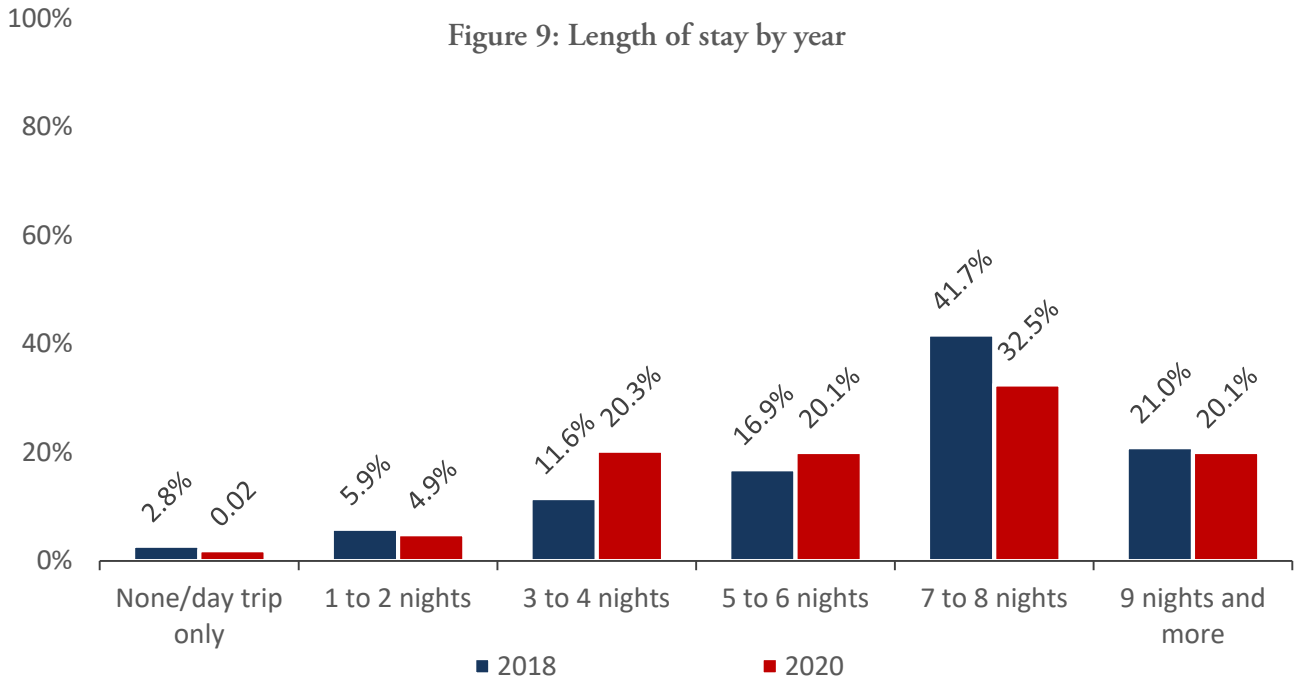
	2018	2020
None/day trip only	2.8%	2.0%
1 night	1.3%	1.9%
2 nights	4.7%	3.1%
3 nights	6.5%	10.3%
4 nights	5.1%	10.0%
5 nights	6.6%	7.7%
6 nights	10.3%	12.4%
7 nights	38.5%	30.4%
8 nights	3.2%	2.1%
9 nights	2.0%	2.3%
10 nights	3.1%	3.4%
11 nights	0.3%	0.5%
12 nights	1.1%	0.8%
13 nights	0.4%	0.6%
14 nights	5.6%	4.8%
15 nights	0.6%	0.5%
More than 15 nights	7.9%	7.1%
N	709	950

Table 17: Length of stay by year

Trip characteristics

What type of accommodations did you use while visiting Hilton Head Island most recently?

Figure 10: Select types of accommodation by year
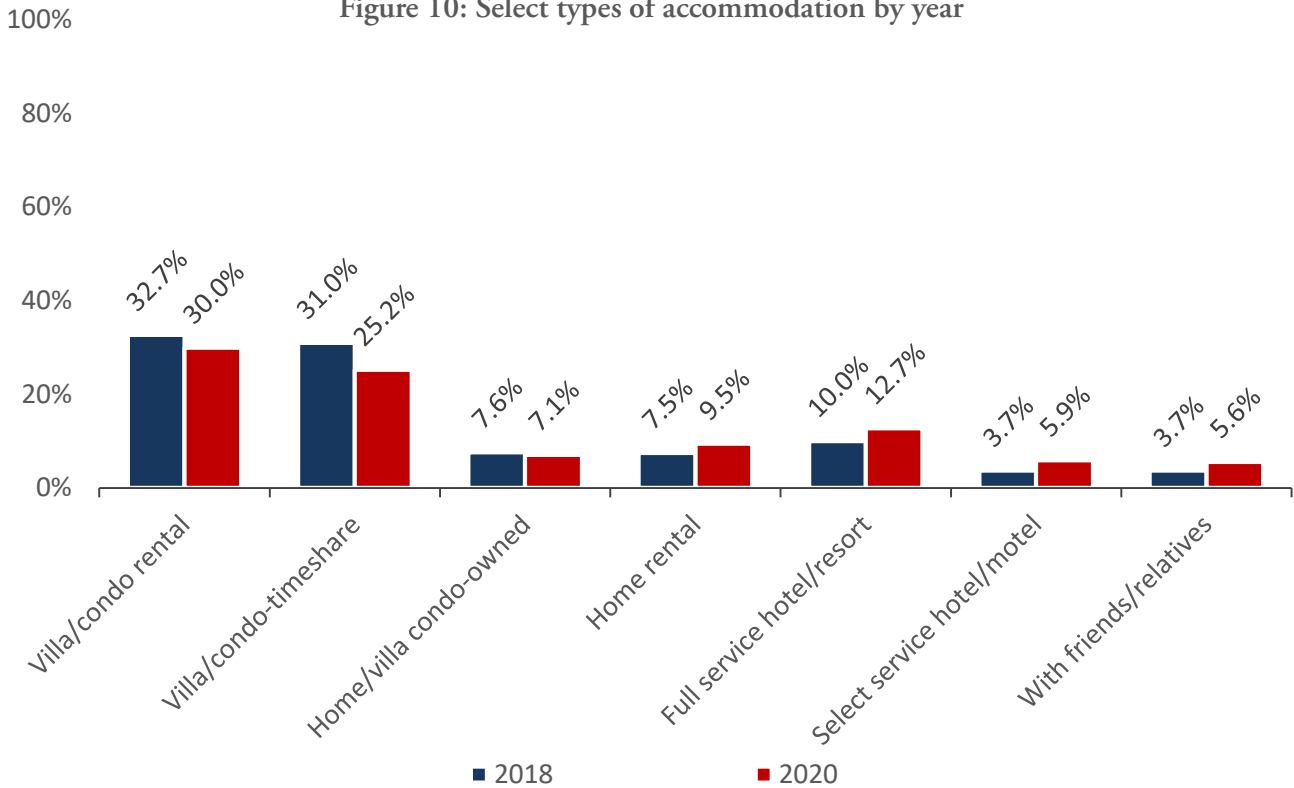
	2018	2020
Villa/condo rental	32.7%	30.0%
Villa/condo-timeshare	31.0%	25.2%
Full service hotel/resort (i.e. Marriott, etc.)	10.0%	12.7%
Home rental	7.5%	9.5%
Home/villa condo-owned	7.6%	7.1%
Select service hotel/motel (i.e., Hampton Inn, Hilton Garden Inn, Quality Inn, etc.)	3.7%	5.9%
With friends/relatives	3.7%	5.6%
RV park	1.0%	1.1%
Day trip - we didn't stay overnight		1.7%
Other (please specify)	3.0%	1.4%
N	710	951

Table 18: Types of accommodation by year

Trip characteristics

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.

Estimated Dollar amount spend	Trip expendiutres (per party/stay)	Trip expendiutres (per party/stay)
	2018	2020
Lodging	$825	$1,060
Food-dining out	$320	$385
Shopping	$15	$245
Food-groceries	$160	$200
Golf	$15	$70
Transportation (locally)	$40	$60
Boating/sailing/fishing	$5	$45
Biking	$60	$30
Dolphin tours	$15	$20
Spas	$200	$15
Museum/historical tours	$10	$15
Nature based activities	$5	$15
Performance/visual arts	$20	$10
Festivals	$0	$10
Tennis	$10	$5
Other expenses	$65	$60
Total $ amonut spend by part and stay	$1,765	$2,245
N	654	855

Table 19: Average trip expenditures by year

Trip characteristics

Which of the shopping locations did you visit during your stay?

Figure 11: Visited select shopping locations by year
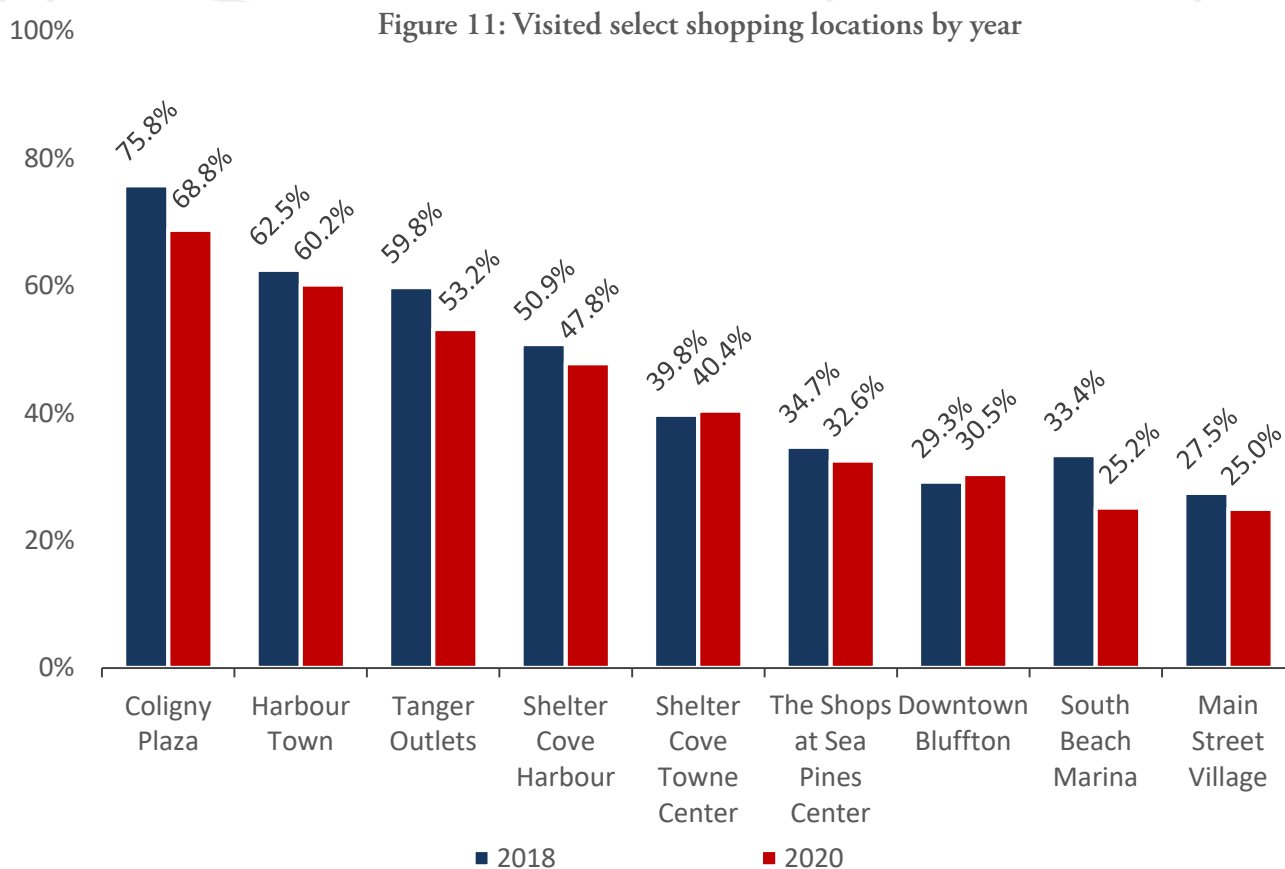
	2018	2020
Coligny Plaza	75.8%	68.8%
Harbour Town	62.5%	60.2%
Tanger Outlets	59.8%	53.2%
Shelter Cove Harbour	50.9%	47.8%
Shopping areas off 278 (Target, Kroger, Best Buy etc.)	0.0%	42.0%
Shelter Cove Towne Center	39.8%	40.4%
The Shops at Sea Pines Center	34.7%	32.6%
Downtown Bluffton	29.3%	30.5%
South Beach Marina	33.4%	25.2%
Main Street Village	27.5%	25.0%
Village at Wexford	22.1%	16.4%
Buckwalter shopping areas	0.0%	2.9%
None	0.0%	2.1%
Other (please specify)	4.3%	5.5%
N	694	945

Table 20: Visited shopping locations by year

Travel planning

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

	2018	2020
VRBO	32.6%	32.8%
A local vacation rental company		22.7%
With the resort (e.g. Sea Pines, Palmetto Dunes etc.)		11.2%
VacationRentals	25.2%	7.2%
HomeAway	7.5%	3.5%
I don't remember		3.5%
AirBnB	4.6%	2.4%
Couchsurfing	1.1%	0.8%
9flats		0.0%
FlipKey	1.4%	0.0%
None		4.0%
Other (please specify)	27.7%	12.0%
N	282	375

Table 21: Utilized online platforms for reservations, by year

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

Figure 12: Consideration of alternative destinations
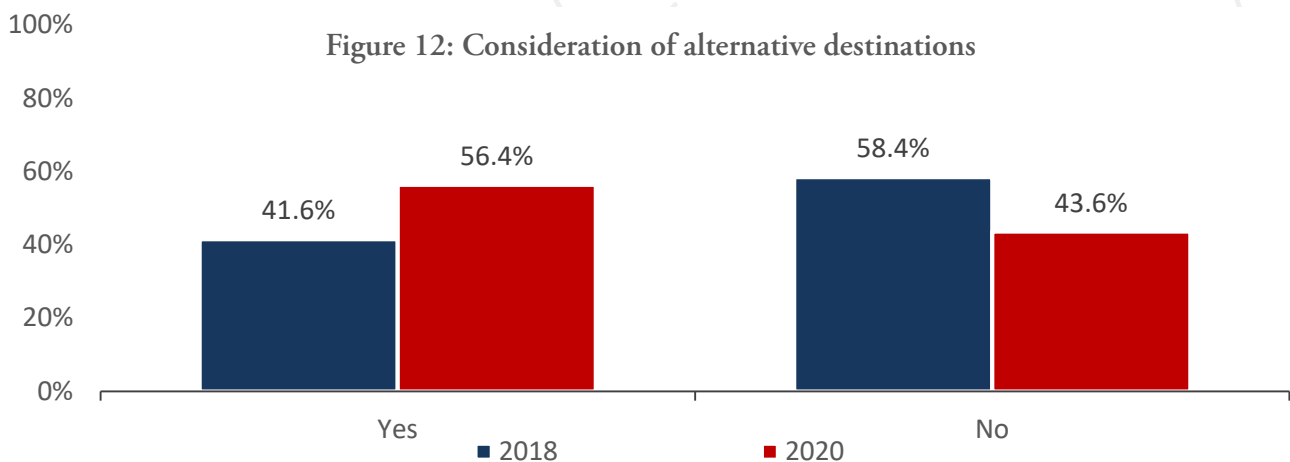
	2018	2020
Yes	41.6%	56.4%
No	58.4%	43.6%
N	1,713	1,691

Table 22: Consideration of alternative destinations by year

Travel planning

Other than Hilton Head Island which of the following destinations did you consider visiting?

	2018	2020
Charleston, SC	30.6%	45.2%
Myrtle Beach, SC	42.4%	37.5%
Savannah, GA	25.9%	33.9%
Outer Banks, NC	24.1%	22.6%
The Florida Keys	16.5%	19.4%
Tybee Island, GA	18.2%	18.2%
Gulf Shores, AL	6.5%	14.9%
Kiawah Island, SC	11.2%	14.1%
Sanibel Island, FL	18.8%	13.7%
Caribbean	11.8%	12.5%
Isle of Palms, SC	11.2%	12.5%
Jekyll Island, GA	8.2%	12.5%
Marco Island/Naples, FL	15.3%	12.1%
Orlando, FL	19.4%	12.1%
Tampa/St. Petersburg, FL	6.5%	10.1%
Amelia Island, FL	9.4%	9.3%
Sandestin, FL	6.5%	8.5%
Sarasota, FL	10.6%	6.9%
Hawaiian islands	6.5%	4.8%
Sea Island, GA	3.5%	4.8%
Boca Raton, FL	1.2%	4.4%
Ponte Vedre, FL	3.5%	3.6%
Pinehurst, NC	0.6%	3.2%
Napa/Sonoma, CA	2.4%	2.8%
Aspen, CO	1.2%	2.0%
Alabama Golf Trail	2.9%	1.6%
Santa Fe, NM	1.2%	1.6%
Reynolds Plantation, GA	1.2%	1.2%
Telluride, CO	0.6%	0.8%
Bluffton, SC	7.7%	0.0%
Other (please specify)	11.8%	11.3%
N	170	248

Table 23: Alternative destinations by year

Travel planning

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

	2018	2020
Had visited in the past and wanted to return.	82.6%	80.3%
Wanted to visit a beach destination.	44.2%	48.3%
Wanted to visit some places withing driving distance.	24.0%	22.7%
It was recommended by friends/family.	14.6%	18.2%
Wanted to visit because of the nature based attractions.		10.9%
Wanted to visit some place new.	6.9%	8.6%
Wanted to visit heritage attractions.	2.5%	4.6%
Discovered/learned about it on the internet/display ads/search ε	1.6%	3.0%
Saw an advertisements in a magazine or website/social about th	0.3%	2.1%
Wanted to attend a cultural/performing arts event.	1.4%	1.9%
Wanted to attend a sporting event.	1.1%	1.7%
Other (please specify)	15.4%	14.2%
N	708	953

Table 24: Reasons for visiting Hilton Head Island

Do you have plans to return to Hilton Head Island?

	2018	2020
Will return to Hilton Head Island, SC	97.6%	98.8%
Will not return to Hilton Head Island, SC	2.4%	1.3%
N	710	878

Table 25: Plans of returning to Hilton Head Island

Figure 13: Plans of returning to Hilton Head Island
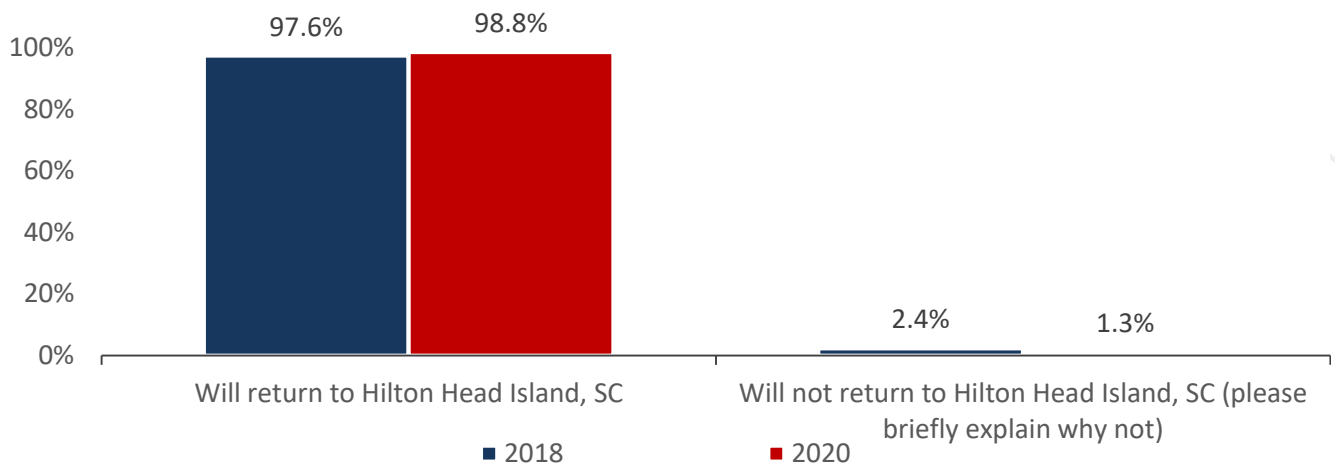
	Of you are not planning on returning, please briefly explain:
1	I am allergic to something in the water there. Maybe sulphur.
2	Have to save money to return
3	It was not as easy to get around as I had hoped. We drove to Tybee and a few others and those were nice. Hilton Head is just too big
4	I may but when I was there it was love bug season and they grosssed me out. Couldnt relax by the pool or the beach because of them
5	Moving
6	No plans to return in the near future. Want to visit new destination.
7	Hilton head is lovely but I'm not the sort of traveler that goes to the same place every year, there are too many other destinations to explore. On the other hand if I was lucky enough to get another freebie from a friend aim would certainly go
8	Loved area
9	One-time visit for Girls' Week. We go to a different location each year.
10	nothing else to see and beaches are full of trash
11	**We have now moved here because we loved it so much**

Table 26: Reasons of not returning

Non−visitors: those who did not travel to Hilton Head Island in the past 18 months

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

Figure 14: Visitation frequency by year
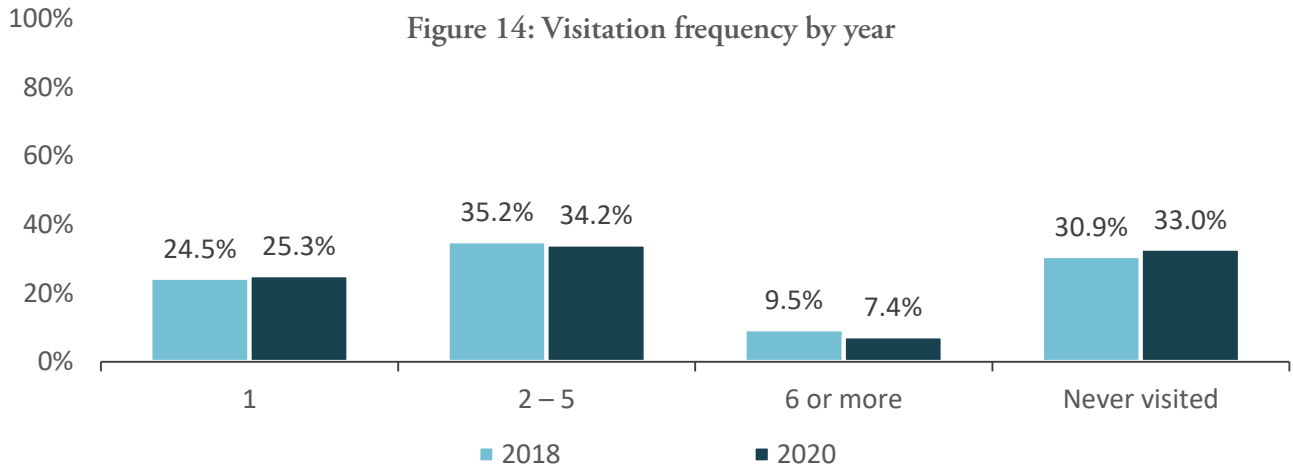
	2018	2020
1	24.5%	25.3%
2 − 5	35.2%	34.2%
6 or more	9.5%	7.4%
Never visited	30.9%	33.0%
N	1,001	739

Table 27: Visitation frequency in the past 10 years, by year

Of those who have never visited before (N=244):
Have you ever thought about visiting Hilton Head Island?

Figure 15: Destination consideration by year
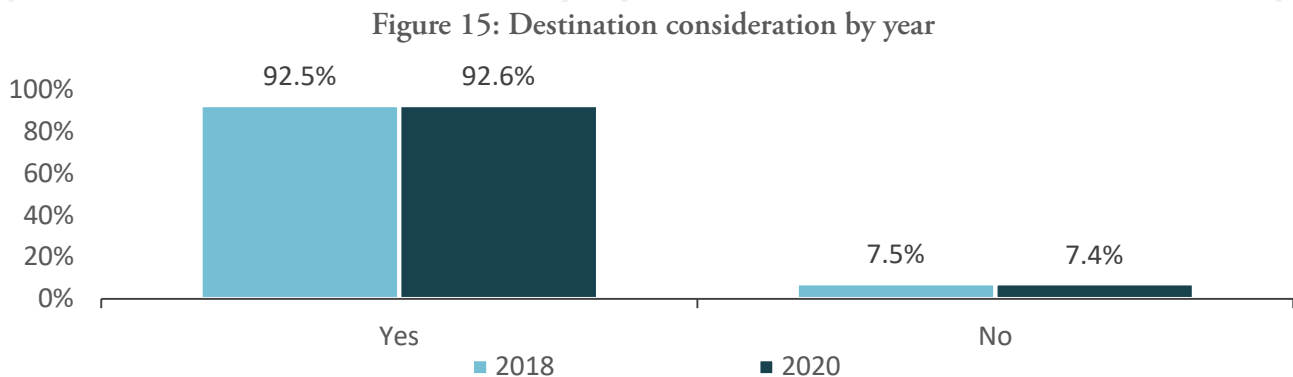
	2018	2020
Yes	92.5%	92.6%
No	7.5%	7.4%
N	308	244

Table 28: Destination consideration by year

Non−visitors

Which of the following most accurately reflects WHY you did NOT visit Hilton Head Island during the last 18 months?

	2018	2020
Traveled elsewhere	55.6%	68.3%
Plan to in the future	15.3%	27.6%
Too expensive	9.4%	9.8%
I didn't travel at all	9.4%	7.2%
Health reasons		4.2%
Didn't offer what I was looking for	1.3%	2.9%
Unpredictable weather (events)		2.6%
Traffic congestion		1.6%
Other (please specify)	9.1%	7.1%
N	994	736

Table 29: Reasons for non-visitation in the past 18 months

Figure 16: Reasons for non-visitation in the past 18 months

■ 2018 ■ 2020
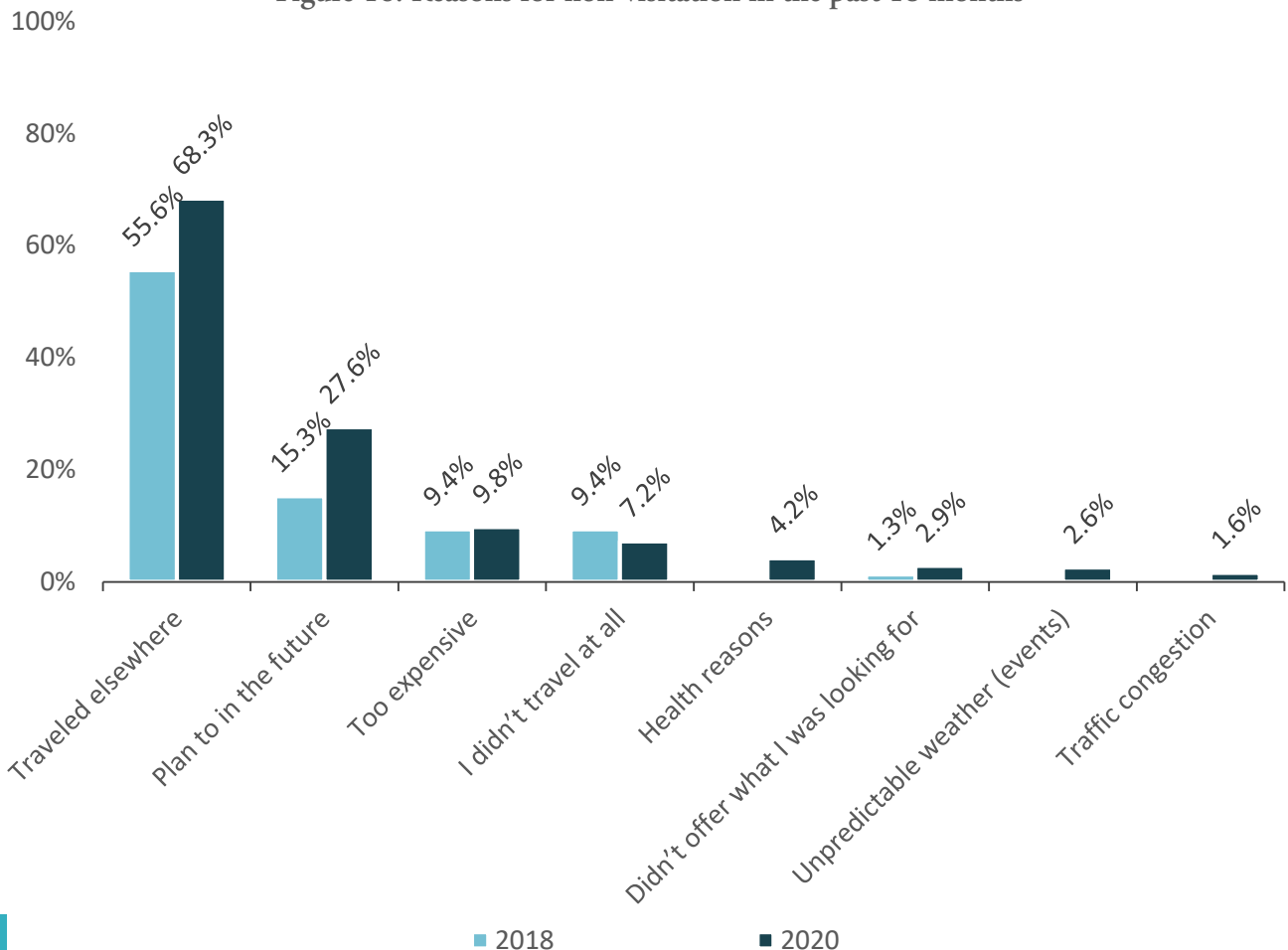
Please indicate the region that you traveled to in the last 18 months.

	2020
Florida	51.4%
North Carolina	24.4%
Northeast - Middle Atlantic (NJ, NY, PA)	20.8%
Other South Atlantic (DE, D.C., MD, VA, WV)	20.0%
West - Pacific (AK, CA, HI, OR, WA)	18.7%
Georgia	17.7%
Midwest - East North Central (IN, IL, MI, OH, WI)	17.5%
West - Mountain (AZ, CO, ID, NM, MT, UT, NV, WY)	17.3%
East South Central (AL, KY, MS, TN)	16.5%
Northeast - New England (CT, ME, MA, NH, RI, VT)	15.5%
Central America (incl. Caribbean, Mexico etc.)	14.9%
West South Central (AR, LA, OK, TX)	12.1%
Western Europe (United Kingdom, France, Germany, etc.)	11.3%
Canada	9.1%
Southern Europe (Spain, Italy, Greece etc.)	6.8%
Midwest - West North Central (IA, NE, KS, ND, MN, SD, MO)	6.6%
South America	3.0%
Eastern Europe (Czech Republic, Hungary, Poland etc.)	1.6%
Australia/New Zealand	1.6%
East Asia (China, South Korea, Japan, Hong Kong, etc.)	1.2%
Western Asia (Turkey, Israel, Iraq, Iran, Saudi Arabia etc.)	1.0%
Africa	0.8%
South Asia (India, Afghanistan, Pakistan, Nepal, etc.)	0.4%
Southeast Asia (Indonesia, Philippines, Thailand, Vietnam, etc.)	0.4%
Central Asia (Uzbekistan, Kazakhstan, Turkmenistan, etc.)	0.0%
N	504

Table 30: Alternative travel destinations in past 18 months, by non-visitors

Figure 17: Travel destinations in the past 18 months, by non-visitors

39
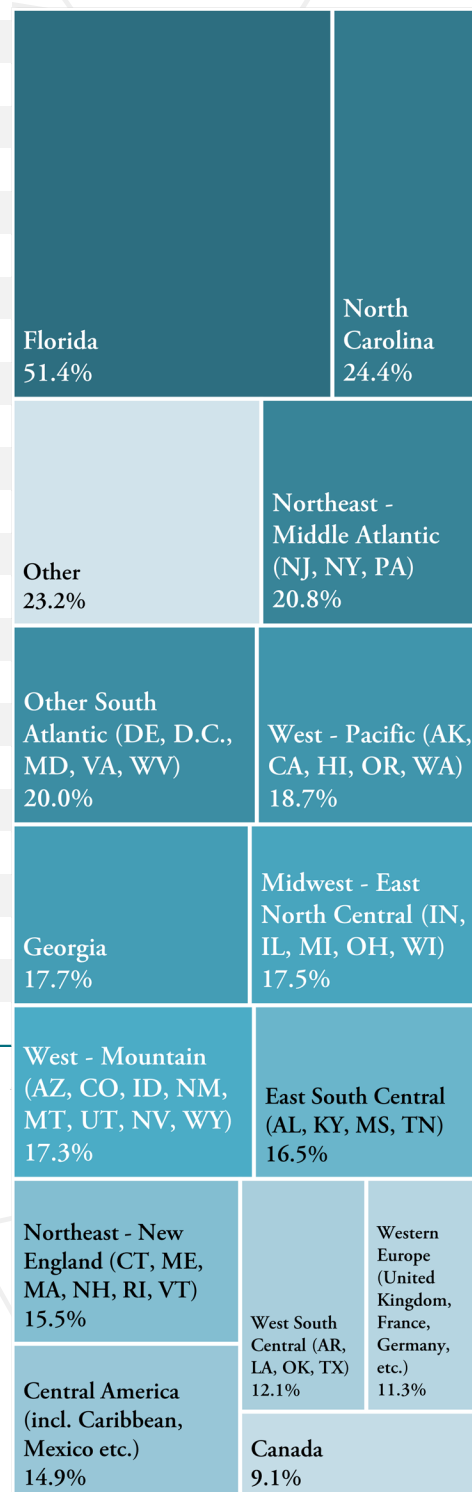
Non-visitors

Do you have plans to visit the Hilton Head Island area in the near future? (N = 649)

Figure 18: Plans of visiting Hilton Head Island in the future

13.7%

27.9%

58.4%

- Yes, but not sure when
- Yes, within one year
- No (please briefly explain why not)
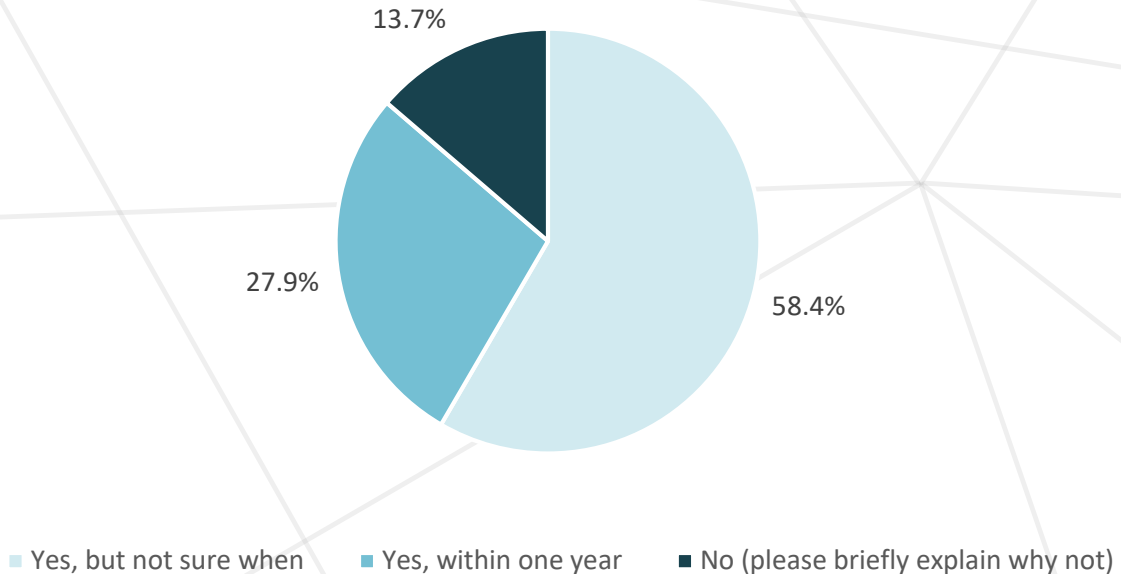
On average, approximately how many leisure/vacation trips do you take a year? (Including day trips)

Figure 19: Frequency of leisure/vacation trips by year

	0 – 1	2 – 4	5 – 7	8 – 10	More than 10
2018	13.7%	58.9%	17.0%	5.2%	5.2%
2020	10.6%	59.3%	17.0%	6.1%	7.0%
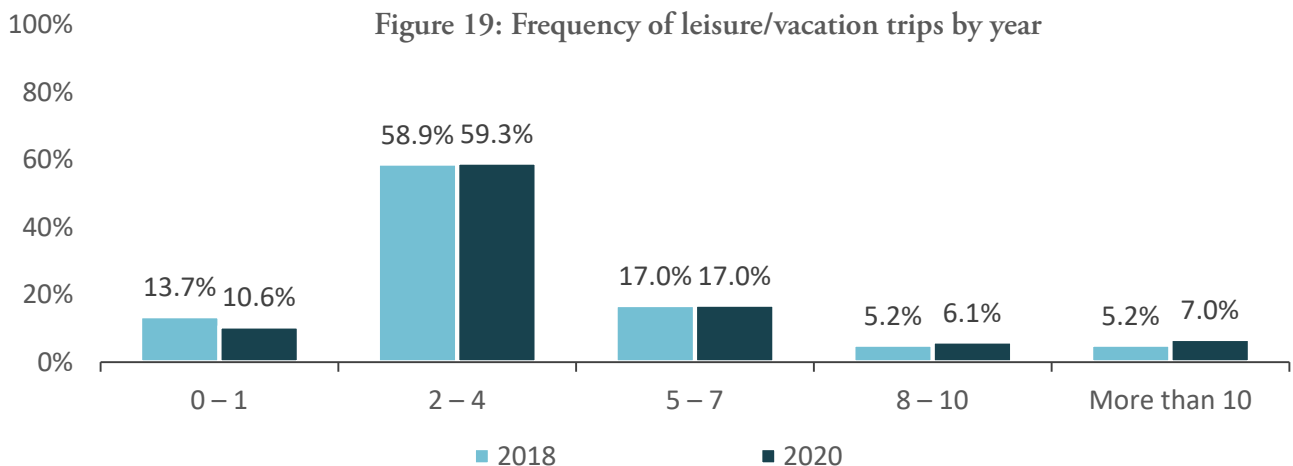
- 2018
- 2020

	2018	2020
0 – 1	13.7%	10.6%
2 – 4	58.9%	59.3%
5 – 7	17.0%	17.0%
8 – 10	5.2%	6.1%
More than 10	5.2%	7.0%
N	1,705	1,684

Table 31: Frequency of leisure/vacation trips by year

All surveyed

What type of accommodations do you normally use while on vacation?

	2018	2020
Resort hotel	25.4%	48.8%
Luxury hotel/inn	14.4%	32.4%
Home rental	10.7%	27.2%
Villa rental	11.0%	27.0%
Timeshare	16.7%	23.7%
With friends and family		23.7%
Condominium hotel	7.0%	16.9%
Motel		16.1%
Luxury villa rental	3.3%	10.9%
Extended stay hotel	3.1%	8.8%
RV		4.0%
Other (please specify)	8.4%	6.2%
N	1,705	1,690

Table 32: Preferred types of accommodation while traveling

Figure 20: Preferred types of accommodation while traveling
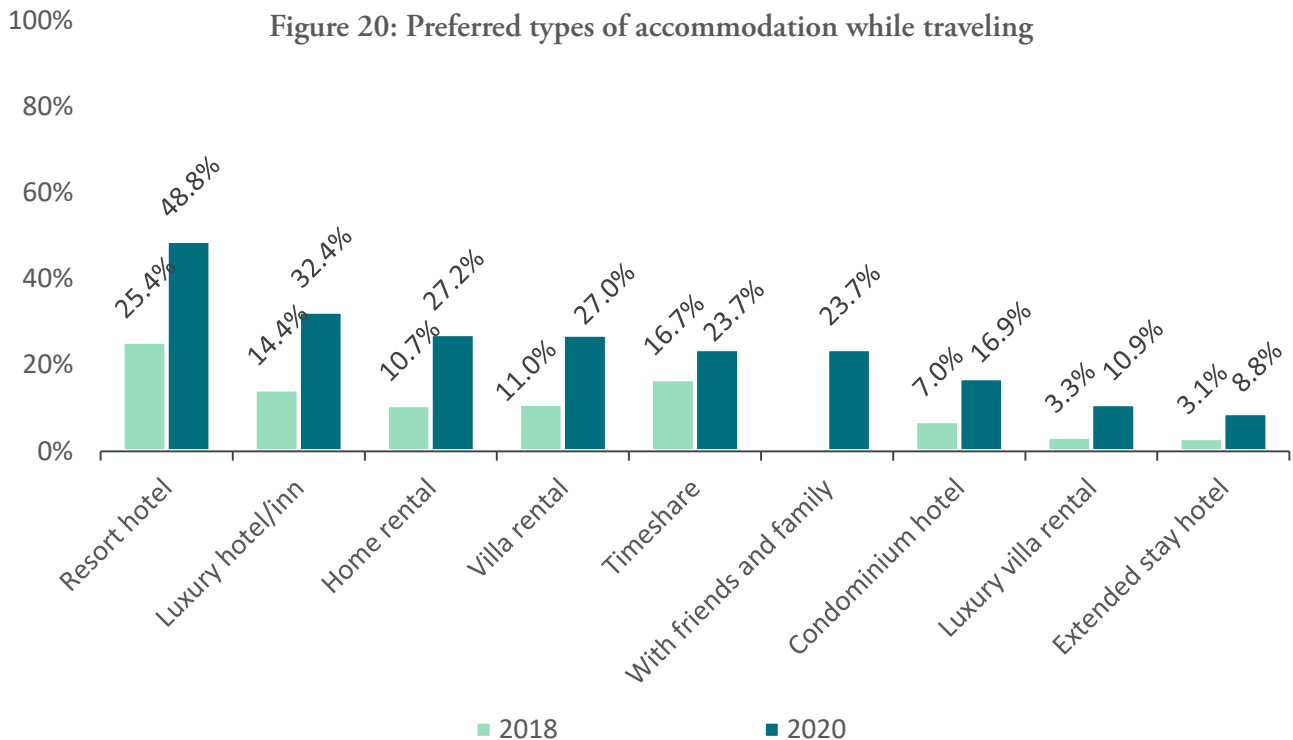
All surveyed

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

	T2B%*	T2B%
	2018	2020
Beaches	93.9%	94.8%
Relaxation & rejuvenation	92.3%	94.4%
Historic attractions	78.4%	83.9%
Passive outdoor adventures (viewing wildlife, walking outdoo	74.8%	81.8%
Cultural experiences	54.3%	74.2%
Culinary experiences	65.3%	73.2%
Romantic couple getaways	66.8%	71.1%
Learning while traveling	61.9%	69.9%
Exploration (discovering unexploited areas)	29.2%	63.3%
Warm weather sports	62.0%	62.5%
Performing/cultural arts getaways	44.1%	51.5%
Immersion excursions (living like locals)	39.7%	50.8%
Quality nightlife options	39.8%	47.8%
Art	39.7%	47.3%
Water sports	42.1%	45.2%
Active outdoor adventures (mountain biking, whitewater kay	38.2%	44.2%
Spectator sporting events	40.5%	42.7%
Urban getaway	38.7%	40.7%
Theme parks	38.8%	38.5%
Medical/wellness	23.1%	31.2%
Waterparks	28.3%	29.6%
Golf getaways	59.6%	28.9%
Luxury camping ("glamping")	22.5%	24.0%
Voluntourism	13.0%	17.8%
Winter sports (downhill skiing, snowboarding)	12.4%	16.8%
Tennis getaways	7.3%	9.2%
N	1,699	1,683

*Those who indicate that a travel was 'appealing' or 'very appealing' to them.

Table 33: Preferred vacation/leisure travel experiences

Figure 21: Preferred vacation/leisure travel experience

Beaches 94.8%
Relaxation & rejuvenation 94.4%
Historic attractions 83.9%
Passive outdoor adventures (viewing wildlife, walking…
Cultural experiences 74.2%
Culinary experiences 73.2%
Romantic couple getaways 71.1%
Learning while traveling 69.9%
Exploration (discovering unexplo…
Warm weather sports 62.5%
Performing/cultural arts getaways…
Immersion excursions (living like locals)…
Quality nightlife options 47.8%
Art 47.3%
Spectator sporting events…
Urban getaway 40.7%
Water sports 45.2%
Theme parks 38.5%
Waterparks 29.6%
Golf getaways 28.9%
Active outdoor adventures (mountain biking, whitewater kayaking,…
Medical/wellness 31.2%
Luxury camping ("glamping")…
Voluntourism 17.8%

All surveyed

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

Figure 22: Select types of preferred attributes for vacation/leisure travel
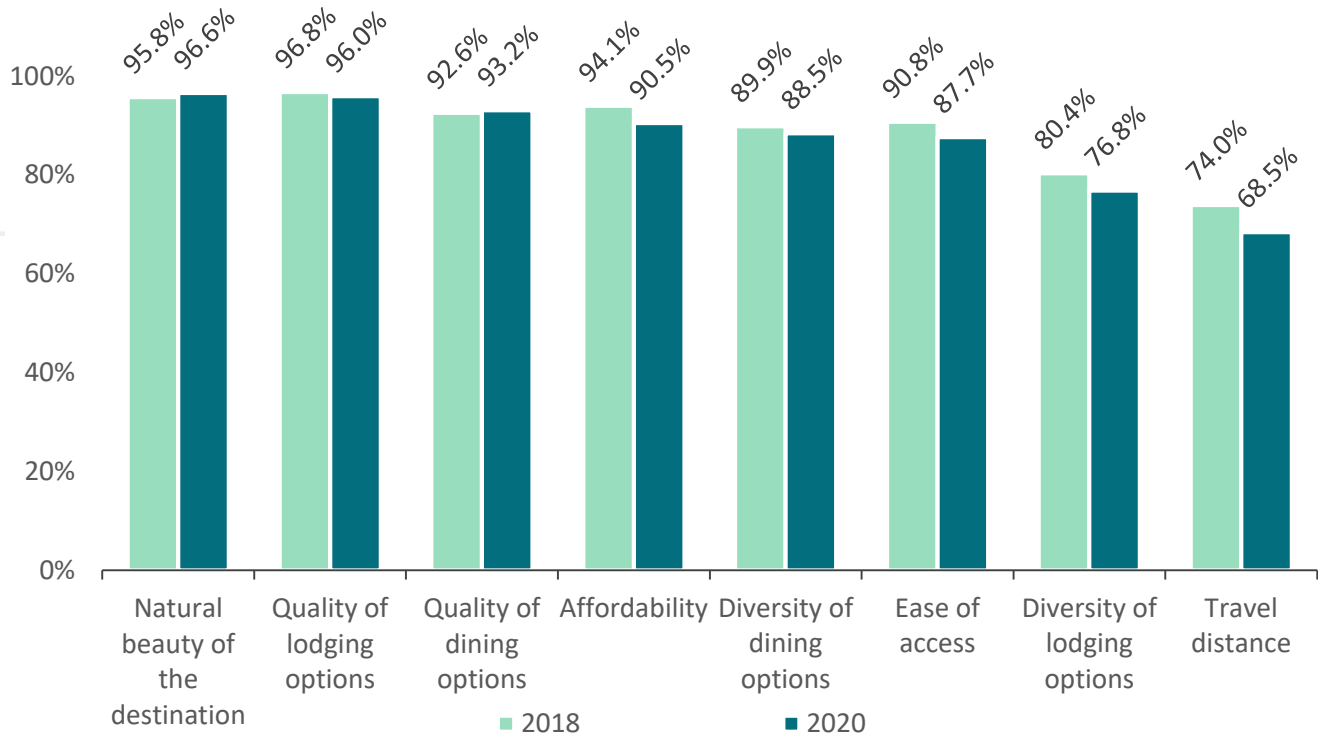
	T2B%*	T2B%
	2018	**2020**
Natural beauty of the destination	95.8%	96.6%
Quality of lodging options	96.8%	96.0%
Quality of dining options	92.6%	93.2%
Affordability	94.1%	90.5%
Diversity of dining options	89.9%	88.5%
Ease of access	90.8%	87.7%
Diversity of lodging options	80.4%	76.8%
Travel distance	74.0%	68.5%
Low traffic congestion	-	67.0%
Activities like events/festivals	71.2%	63.5%
Access to other cities in the surrounding area	71.1%	58.5%
Environmental/ecological sensitivity	50.9%	56.6%
Nightlife activity options	42.2%	39.5%
Medical/wellness	31.7%	38.4%
Public transportation	-	21.8%
N	1,699	1,683

*Those who indicate that a travel was 'important' or 'very important' to them.

Table 34: Preferred attributes for vacation/leisure travel

All surveyed

Within which month are you most likely to travel for vacation purposes? Select all that apply.

Figure 23: Preferred travel months
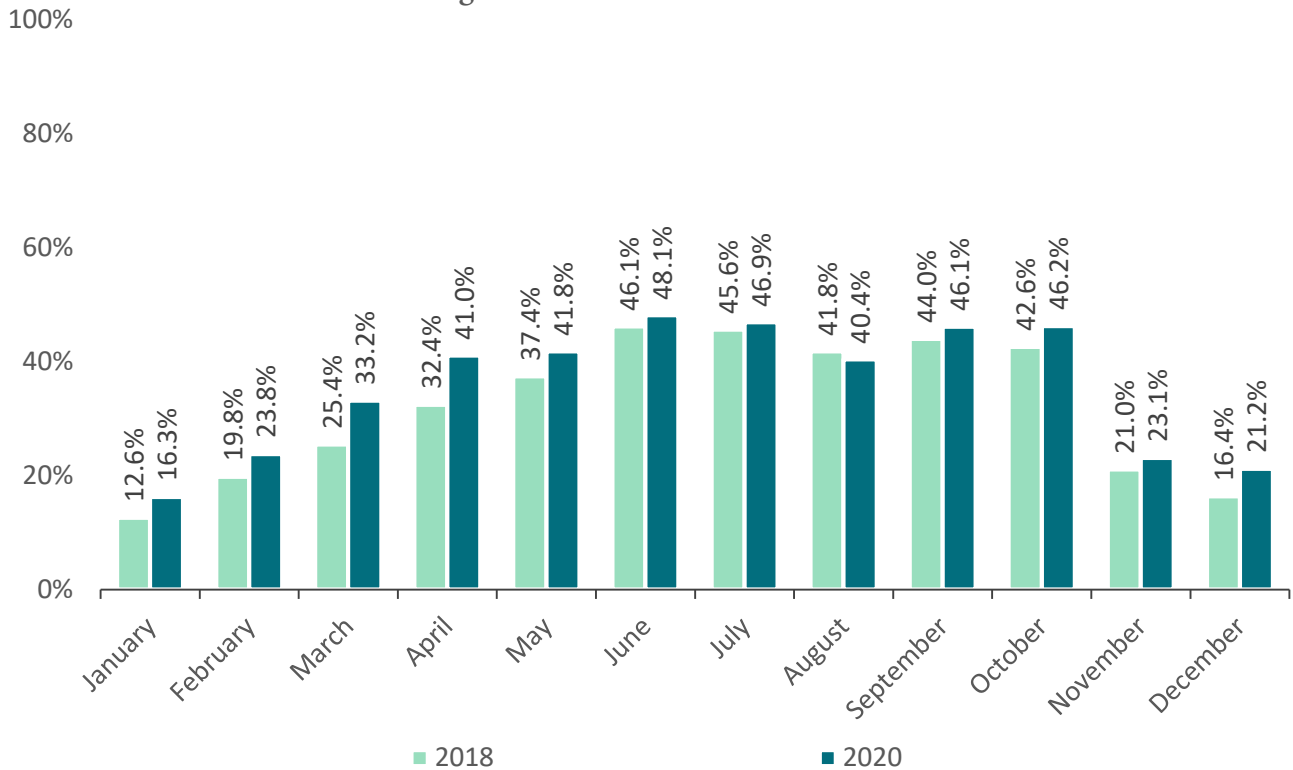
■ 2018   ■ 2020

	2018	2020
January	12.6%	16.3%
February	19.8%	23.8%
March	25.4%	33.2%
April	32.4%	41.0%
May	37.4%	41.8%
June	46.1%	48.1%
July	45.6%	46.9%
August	41.8%	40.4%
September	44.0%	46.1%
October	42.6%	46.2%
November	21.0%	23.1%
December	16.4%	21.2%
N	1,706	1,686

Table 35: Preferred travel months

44

All surveyed - Nature based travel survey results

Please indicate the extent to which you agree with each of the following statements about tourism.

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Weighted Average
My nature based experiences are usually just one component of a multi-purpose trip experience	14.5%	55.1%	23.4%	4.9%	2.1%	3.75
When I find a nature tourism location that I really like, I tend to return there as often as I can	11.9%	42.3%	36.4%	7.5%	2.0%	3.55
Comfortable accommodations are a priority for me	52.1%	42.0%	3.2%	0.5%	2.2%	4.42
I like nature based travel, but I also enjoy spending time at a beach resort	39.7%	43.2%	12.4%	3.0%	1.8%	4.16
I like to visit destinations that few others have visited	7.9%	25.7%	51.7%	11.7%	2.9%	3.24
All else being equal, I prefer to travel as part of a larger group, as opposed to a small group (i.e., 4 persons or less)	2.9%	6.2%	27.1%	38.3%	25.4%	2.23
I often take holidays on the spur of the moment	8.7%	27.8%	27.8%	27.8%	7.8%	3.02
N						1,685

Table 36: Nature based travel preferences 1/5

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Weighted Average
I usually do what I can to leave the site or area in better condition than when I arrived	42.3%	44.3%	11.9%	0.7%	0.8%	4.27
I would rather rely on a travel agent or tour operator than make my own travel arrangements	2.0%	5.6%	30.5%	39.1%	22.9%	2.25
I try to support the local economy of places that I visit	37.9%	53.4%	7.4%	0.7%	0.6%	4.27
N						1,683

Table 37: Nature based travel preferences 2/5

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Weighted Average
My nature based travel has made me more environmentally conscientious	13.7%	45.7%	35.0%	4.2%	1.4%	3.66
I like my nature based travel experiences to be physically challenging	2.9%	16.4%	42.2%	28.4%	10.1%	2.74
I like to have all my travel arrangements made in advance before I start out on a holiday	19.2%	42.0%	24.5%	12.3%	2.0%	3.64
My idea of an ideal nature based travel destination is a wilderness setting	1.9%	15.0%	48.1%	24.5%	10.6%	2.73
I enjoy an element of risk in my nature based travel experiences	1.7%	10.2%	29.8%	36.1%	22.2%	2.33
N						1,682

Table 38: Nature based travel preferences 3/5

All surveyed - Nature based travel survey results

Please indicate the extent to which each of the following motivations is important to you when selecting a destination to visit.

	Very important	Important	Neither important nor unimportant	Unimportant	Not at all important	Weighted Average
Having new experiences	23.2%	59.6%	15.4%	1.4%	0.4%	4.04
Seeing wildlife in its natural habitat	17.3%	49.8%	27.2%	4.4%	1.3%	3.77
Being able to tell my friends about my experiences	18.4%	42.3%	28.9%	7.2%	3.2%	3.65
Absence of crowds	11.4%	47.8%	35.4%	4.9%	0.6%	3.64
Escaping the urban environment	14.2%	41.8%	38.1%	5.0%	1.0%	3.63
Being close to nature	11.5%	47.3%	34.6%	5.5%	1.2%	3.62
Learning about the natural environment	11.0%	47.3%	35.0%	5.5%	1.2%	3.61
Having exciting and adventurous experiences	11.6%	46.0%	33.8%	7.4%	1.3%	3.59
Self-discovery	8.4%	35.7%	45.9%	7.7%	2.3%	3.40
Meeting new people with similar interests	6.9%	32.4%	43.8%	13.0%	3.9%	3.25
N						1,685

Table 39: Nature based travel preferences 4/5

	Very important	Important	Neither important nor unimportant	Unimportant	Not at all important	Weighted Average
Being physically active	12.7%	50.3%	27.7%	7.2%	2.2%	3.64
Experiencing the peace and tranquility of the natural environment	26.2%	60.2%	12.0%	1.2%	0.4%	4.11
Visiting as many nature based travel destinations as possible	7.0%	30.4%	48.9%	11.0%	2.8%	3.28
Rest and relaxation	50.0%	44.6%	4.4%	0.9%	0.1%	4.44
Positive previous experience	40.9%	48.4%	9.4%	1.0%	0.3%	4.29
Reputation	32.2%	55.8%	11.4%	0.5%	0.1%	4.20
Availability at a good price	47.3%	48.1%	4.2%	0.4%	0.1%	4.42
N						1,677

Table 40: Nature based travel preferences 5/5

Appendix

All ZIP-Codes collected by MSA

#	Metropolitan Area (MSA)	Count MSA	Percent total
1	New York-Northern New Jersey-Long Island, NY-NJ-PA MSA	102	6.7%
2	Atlanta-Sandy Springs-Marietta, GA MSA	99	6.5%
3	Cleveland-Elyria-Mentor, OH MSA	55	3.6%
4	Charlotte-Gastonia-Concord, NC-SC MSA	47	3.1%
5	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	44	2.9%
6	Pittsburgh, PA MSA	43	2.8%
7	Cincinnati-Middletown, OH-KY-IN MSA	42	2.8%
8	Chicago-Naperville-Joliet, IL-IN-WI MSA	42	2.8%
9	Columbus, OH MSA	35	2.3%
10	Boston-Cambridge-Quincy, MA-NH MSA	31	2.0%
11	Akron, OH MSA	30	2.0%
12	Augusta-Richmond County, GA-SC MSA	26	1.7%
13	Detroit-Warren-Livonia, MI MSA	26	1.7%
14	Columbia, SC MSA	19	1.2%
15	Knoxville, TN MSA	19	1.2%
16	Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	19	1.2%
17	Richmond, VA MSA	17	1.1%
18	Indianapolis-Carmel, IN MSA	16	1.0%
19	Greenville, SC MSA	15	1.0%
20	Miami-Fort Lauderdale-Miami Beach, FL MSA	14	0.9%
21	Orlando-Kissimmee, FL MSA	14	0.9%
22	Baltimore-Towson, MD MSA	14	0.9%
23	Minneapolis-St. Paul-Bloomington, MN-WI MSA	13	0.9%
24	Canton-Massillon, OH MSA	13	0.9%
25	Louisville-Jefferson County, KY-IN MSA	11	0.7%
26	Kingsport-Bristol-Bristol, TN-VA MSA	11	0.7%
27	Albany-Schenectady-Troy, NY MSA	11	0.7%
28	Hartford-West Hartford-East Hartford, CT MSA	11	0.7%
29	Dallas-Fort Worth-Arlington, TX MSA	10	0.7%
30	Tampa-St. Petersburg-Clearwater, FL MSA	10	0.7%
31	Charleston-North Charleston, SC MSA	10	0.7%
32	St. Louis, MO-IL MSA	10	0.7%
33	Houston-Sugar Land-Baytown, TX MSA	10	0.7%
34	Nashville-Davidson--Murfreesboro, TN MSA	10	0.7%
35	Raleigh-Cary, NC MSA	10	0.7%

Table 41: All zip codes collected by MSA 1/9

Appendix

All ZIP−Codes collected by MSA

36	Allentown-Bethlehem-Easton, PA-NJ MSA	10	0.7%
37	Providence-New Bedford-Fall River, RI-MA MSA	10	0.7%
38	Jacksonville, FL MSA	9	0.6%
39	Birmingham-Hoover, AL MSA	9	0.6%
40	Asheville, NC MSA	9	0.6%
41	Youngstown-Warren-Boardman, OH-PA MSA	9	0.6%
42	Virginia Beach-Norfolk-Newport News, VA-NC MSA	9	0.6%
43	Myrtle Beach-Conway-North Myrtle Beach, SC MSA	8	0.5%
44	Denver-Aurora, CO MSA	8	0.5%
45	Lexington-Fayette, KY MSA	8	0.5%
46	Sarasota-Bradenton-Venice, FL MSA	7	0.5%
47	Buffalo-Niagara Falls, NY MSA	7	0.5%
48	Wilmington, NC MSA	6	0.4%
49	Madison, WI MSA	6	0.4%
50	Milwaukee-Waukesha-West Allis, WI MSA	6	0.4%
51	Fort Wayne, IN MSA	6	0.4%
52	Winston-Salem, NC MSA	6	0.4%
53	Toledo, OH MSA	6	0.4%
54	Harrisburg-Carlisle, PA MSA	6	0.4%
55	Rochester, NY MSA	6	0.4%
56	New Haven-Milford, CT MSA	6	0.4%
57	Macon, GA MSA	5	0.3%
58	Ocala, FL MSA	5	0.3%
59	Seattle-Tacoma-Bellevue, WA MSA	5	0.3%
60	Memphis, TN-MS-AR MSA	5	0.3%
61	Los Angeles-Long Beach-Santa Ana, CA MSA	5	0.3%
62	Johnson City, TN MSA	5	0.3%
63	Durham, NC MSA	5	0.3%
64	Blacksburg-Christiansburg-Radford, VA MSA	5	0.3%
65	Roanoke, VA MSA	5	0.3%
66	Dayton, OH MSA	5	0.3%
67	Spartanburg, SC MSA	5	0.3%
68	Binghamton, NY MSA	5	0.3%
69	Poughkeepsie-Newburgh-Middletown, NY MSA	5	0.3%

Table 42: All zip codes collected by MSA 2/9

Appendix

All ZIP−Codes collected by MSA

70	Bridgeport-Stamford-Norwalk, CT MSA	5	0.3%
71	Salt Lake City, UT MSA	4	0.3%
72	San Antonio, TX MSA	4	0.3%
73	Omaha-Council Bluffs, NE-IA MSA	4	0.3%
74	Lakeland, FL MSA	4	0.3%
75	Florence, SC MSA	4	0.3%
76	Appleton, WI MSA	4	0.3%
77	Greensboro-High Point, NC MSA	4	0.3%
78	Lynchburg, VA MSA	4	0.3%
79	Monroe, MI MSA	4	0.3%
80	New Philadelphia-Dover, OH MSA	4	0.3%
81	York-Hanover, PA MSA	4	0.3%
82	Lancaster, PA MSA	4	0.3%
83	Reading, PA MSA	4	0.3%
84	Scranton--Wilkes-Barre, PA MSA	4	0.3%
85	Worcester, MA MSA	4	0.3%
86	Riverside-San Bernardino-Ontario, CA MSA	3	0.2%
87	Albuquerque, NM MSA	3	0.2%
88	Naples-Marco Island, FL MSA	3	0.2%
89	Fayetteville, NC MSA	3	0.2%
90	Kansas City, MO-KS MSA	3	0.2%
91	Gainesville, GA MSA	3	0.2%
92	Tallahassee, FL MSA	3	0.2%
93	Georgetown, SC MSA	3	0.2%
94	Cape Coral-Fort Myers, FL MSA	3	0.2%
95	Palm Bay-Melbourne-Titusville, FL MSA	3	0.2%
96	Deltona-Daytona Beach-Ormond Beach, FL MSA	3	0.2%
97	Grand Rapids-Wyoming, MI MSA	3	0.2%
98	Huntington-Ashland, WV-KY-OH MSA	3	0.2%
99	Charleston, WV MSA	3	0.2%
100	Anderson, SC MSA	3	0.2%
101	Chattanooga, TN-GA MSA	3	0.2%
102	Burlington, NC MSA	3	0.2%
103	Mansfield, OH MSA	3	0.2%
104	Sandusky, OH MSA	3	0.2%
105	Weirton-Steubenville, WV-OH MSA	3	0.2%

Table 43: All zip codes collected by MSA 3/9

All ZIP-Codes collected by MSA

106	Little Rock-North Little Rock, AR MSA	3	0.2%
107	San Francisco-Oakland-Fremont, CA MSA	2	0.1%
108	Eugene-Springfield, OR MSA	2	0.1%
109	Phoenix-Mesa-Scottsdale, AZ MSA	2	0.1%
110	Greeley, CO MSA	2	0.1%
111	Port St. Lucie-Fort Pierce, FL MSA	2	0.1%
112	Brunswick, GA MSA	2	0.1%
113	Milledgeville, GA MSA	2	0.1%
114	Hinesville-Fort Stewart, GA MSA	2	0.1%
115	Hattiesburg, MS MSA	2	0.1%
116	Jackson, MS MSA	2	0.1%
117	Oklahoma City, OK MSA	2	0.1%
118	Sioux Falls, SD MSA	2	0.1%
119	Des Moines-West Des Moines, IA MSA	2	0.1%
120	Marshfield-Wisconsin Rapids, WI MSA	2	0.1%
121	Portland-Vancouver-Beaverton, OR-WA MSA	2	0.1%
122	Columbus, GA-AL MSA	2	0.1%
123	Beaumont-Port Arthur, TX MSA	2	0.1%
124	Palm Coast, FL MSA	2	0.1%
125	New Orleans-Metairie-Kenner, LA MSA	2	0.1%
126	Warner Robins, GA MSA	2	0.1%
127	Walterboro, SC MSA	2	0.1%
128	San Diego-Carlsbad-San Marcos, CA MSA	2	0.1%
129	Effingham, IL MSA	2	0.1%
130	Evansville, IN-KY MSA	2	0.1%
131	Sumter, SC MSA	2	0.1%
132	Dalton, GA MSA	2	0.1%
133	Tullahoma, TN MSA	2	0.1%
134	Rome, GA MSA	2	0.1%
135	Bloomington, IN MSA	2	0.1%
136	Springfield, IL MSA	2	0.1%
137	Ottawa-Streator, IL MSA	2	0.1%
138	Oshkosh-Neenah, WI MSA	2	0.1%
139	Green Bay, WI MSA	2	0.1%
140	Muncie, IN MSA	2	0.1%

Table 44: All zip codes collected by MSA 4/9

Appendix

All ZIP−Codes collected by MSA

141	Kalamazoo-Portage, MI MSA	2	0.1%
142	Sevierville, TN MSA	2	0.1%
143	Hickory-Lenoir-Morganton, NC MSA	2	0.1%
144	Mount Sterling, KY MSA	2	0.1%
145	Portsmouth, OH MSA	2	0.1%
146	Athens, OH MSA	2	0.1%
147	Statesville-Mooresville, NC MSA	2	0.1%
148	Southern Pines-Pinehurst, NC MSA	2	0.1%
149	Thomasville-Lexington, NC MSA	2	0.1%
150	Athens-Clarke County, GA MSA	2	0.1%
151	Parkersburg-Marietta-Vienna, WV-OH MSA	2	0.1%
152	Lansing-East Lansing, MI MSA	2	0.1%
153	Somerset, PA MSA	2	0.1%
154	Indiana, PA MSA	2	0.1%
155	Greenville, NC MSA	2	0.1%
156	Ocean City, NJ MSA	2	0.1%
157	Hagerstown-Martinsburg, MD-WV MSA	2	0.1%
158	Pottsville, PA MSA	2	0.1%
159	Atlantic City, NJ MSA	2	0.1%
160	East Stroudsburg, PA MSA	2	0.1%
161	Kingston, NY MSA	2	0.1%
162	Utica-Rome, NY MSA	2	0.1%
163	Springfield, MA MSA	2	0.1%
164	Rockland, ME MSA	2	0.1%
165	Honolulu, HI MSA	1	0.1%
166	Kahului-Wailuku, HI MSA	1	0.1%
167	Hilo, HI MSA	1	0.1%
168	Santa Rosa-Petaluma, CA MSA	1	0.1%
169	San Jose-Sunnyvale-Santa Clara, CA MSA	1	0.1%
170	Modesto, CA MSA	1	0.1%
171	Fresno, CA MSA	1	0.1%
172	Redding, CA MSA	1	0.1%
173	Reno-Sparks, NV MSA	1	0.1%
174	Las Vegas-Paradise, NV MSA	1	0.1%
175	Boise City-Nampa, ID MSA	1	0.1%

Table 45: All zip codes collected by MSA 5/9

Appendix

All ZIP-Codes collected by MSA

176	Albany, GA MSA	1	0.1%
177	Durango, CO MSA	1	0.1%
178	Arkadelphia, AR MSA	1	0.1%
179	Colorado Springs, CO MSA	1	0.1%
180	Albertville, AL MSA	1	0.1%
181	Fort Collins-Loveland, CO MSA	1	0.1%
182	Homosassa Springs, FL MSA	1	0.1%
183	Victoria, TX MSA	1	0.1%
184	Vidalia, GA MSA	1	0.1%
185	Baton Rouge, LA MSA	1	0.1%
186	Lafayette, LA MSA	1	0.1%
187	Gainesville, FL MSA	1	0.1%
188	Morgan City, LA MSA	1	0.1%
189	Picayune, MS MSA	1	0.1%
190	Dothan, AL MSA	1	0.1%
191	Killeen-Temple-Fort Hood, TX MSA	1	0.1%
192	Lawton, OK MSA	1	0.1%
193	Albemarle, NC MSA	1	0.1%
194	Tulsa, OK MSA	1	0.1%
195	Wichita, KS MSA	1	0.1%
196	Sioux City, IA-NE-SD MSA	1	0.1%
197	Fayetteville-Springdale-Rogers, AR-MO MSA	1	0.1%
198	Lawrence, KS MSA	1	0.1%
199	Sedalia, MO MSA	1	0.1%
200	Calhoun, GA MSA	1	0.1%
201	Jonesboro, AR MSA	1	0.1%
202	Jefferson City, MO MSA	1	0.1%
203	Poplar Bluff, MO MSA	1	0.1%
204	Mankato-North Mankato, MN MSA	1	0.1%
205	Davenport-Moline-Rock Island, IA-IL MSA	1	0.1%
206	Astoria, OR MSA	1	0.1%
207	Olympia, WA MSA	1	0.1%
208	Mount Vernon-Anacortes, WA MSA	1	0.1%
209	Pendleton-Hermiston, OR MSA	1	0.1%
210	Dickinson, ND MSA	1	0.1%

Table 46: All zip codes collected by MSA 6/9

Appendix

All ZIP-Codes collected by MSA

211	Fargo, ND-MN MSA	1	0.1%
212	Alexandria, MN MSA	1	0.1%
213	Brainerd, MN MSA	1	0.1%
214	Eau Claire, WI MSA	1	0.1%
215	Austin-Round Rock, TX MSA	1	0.1%
216	Wichita Falls, TX MSA	1	0.1%
217	Dublin, GA MSA	1	0.1%
218	Corpus Christi, TX MSA	1	0.1%
219	The Villages, FL MSA	1	0.1%
220	Waco, TX MSA	1	0.1%
221	Daphne-Fairhope, AL MSA	1	0.1%
222	Tallulah, LA MSA	1	0.1%
223	Auburn-Opelika, AL MSA	1	0.1%
224	Talladega-Sylacauga, AL MSA	1	0.1%
225	Scottsboro, AL MSA	1	0.1%
226	Humboldt, TN MSA	1	0.1%
227	Martin, TN MSA	1	0.1%
228	Huntsville, AL MSA	1	0.1%
229	Hot Springs, AR MSA	1	0.1%
230	Paris, TN MSA	1	0.1%
231	Clarksville, TN-KY MSA	1	0.1%
232	Sherman-Denison, TX MSA	1	0.1%
233	Crossville, TN MSA	1	0.1%
234	Owensboro, KY MSA	1	0.1%
235	Bowling Green, KY MSA	1	0.1%
236	Glasgow, KY MSA	1	0.1%
237	Frankfort, KY MSA	1	0.1%
238	Peoria, IL MSA	1	0.1%
239	Dixon, IL MSA	1	0.1%
240	Champaign-Urbana, IL MSA	1	0.1%
241	Terre Haute, IN MSA	1	0.1%
242	Pontiac, IL MSA	1	0.1%
243	Kankakee-Bradley, IL MSA	1	0.1%
244	Freeport, IL MSA	1	0.1%
245	Watertown-Fort Atkinson, WI MSA	1	0.1%

Table 47: All zip codes collected by MSA 7/9

Appendix

All ZIP−Codes collected by MSA

246	Racine, WI MSA	1	0.1%
247	Manitowoc, WI MSA	1	0.1%
248	Lafayette, IN MSA	1	0.1%
249	Frankfort, IN MSA	1	0.1%
250	Logansport, IN MSA	1	0.1%
251	Kokomo, IN MSA	1	0.1%
252	Warsaw, IN MSA	1	0.1%
253	South Bend-Mishawaka, IN-MI MSA	1	0.1%
254	Anderson, IN MSA	1	0.1%
255	Marion, IN MSA	1	0.1%
256	Richmond, IN MSA	1	0.1%
257	Huntington, IN MSA	1	0.1%
258	Muskegon-Norton Shores, MI MSA	1	0.1%
259	Holland-Grand Haven, MI MSA	1	0.1%
260	Jackson, MI MSA	1	0.1%
261	Newport, TN MSA	1	0.1%
262	Greeneville, TN MSA	1	0.1%
263	Boone, NC MSA	1	0.1%
264	Richmond-Berea, KY MSA	1	0.1%
265	Chillicothe, OH MSA	1	0.1%
266	Point Pleasant, WV-OH MSA	1	0.1%
267	Portales, NM MSA	1	0.1%
268	Seneca, SC MSA	1	0.1%
269	Dunn, NC MSA	1	0.1%
270	North Wilkesboro, NC MSA	1	0.1%
271	Newberry, SC MSA	1	0.1%
272	Amarillo, TX MSA	1	0.1%
273	Lincolnton, NC MSA	1	0.1%
274	Beckley, WV MSA	1	0.1%
275	Martinsville, VA MSA	1	0.1%
276	Staunton-Waynesboro, VA MSA	1	0.1%
277	Wilmington, OH MSA	1	0.1%
278	Urbana, OH MSA	1	0.1%
279	Adrian, MI MSA	1	0.1%
280	Fremont, OH MSA	1	0.1%

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Table 48: All zip codes collected by MSA 8/9

Appendix

All ZIP−Codes collected by MSA

281	Mount Vernon, OH MSA	1	0.1%
282	Zanesville, OH MSA	1	0.1%
283	Ashland, OH MSA	1	0.1%
284	Wooster, OH MSA	1	0.1%
285	Ann Arbor, MI MSA	1	0.1%
286	Flint, MI MSA	1	0.1%
287	Bay City, MI MSA	1	0.1%
288	Wheeling, WV-OH MSA	1	0.1%
289	Meadville, PA MSA	1	0.1%
290	Erie, PA MSA	1	0.1%
291	Brevard, NC MSA	1	0.1%
292	Winchester, VA-WV MSA	1	0.1%
293	Easton, MD MSA	1	0.1%
294	Seaford, DE MSA	1	0.1%
295	Vineland-Millville-Bridgeton, NJ MSA	1	0.1%
296	Cumberland, MD-WV MSA	1	0.1%
297	Altoona, PA MSA	1	0.1%
298	Chambersburg, PA MSA	1	0.1%
299	Huntingdon, PA MSA	1	0.1%
300	State College, PA MSA	1	0.1%
301	Lebanon, PA MSA	1	0.1%
302	Elmira, NY MSA	1	0.1%
303	Syracuse, NY MSA	1	0.1%
304	Trenton-Ewing, NJ MSA	1	0.1%
305	Torrington, CT MSA	1	0.1%
306	Pittsfield, MA MSA	1	0.1%
307	Glens Falls, NY MSA	1	0.1%
308	Malone, NY MSA	1	0.1%
309	Keene, NH MSA	1	0.1%
310	Manchester-Nashua, NH MSA	1	0.1%
311	Laconia, NH MSA	1	0.1%
312	Portland-South Portland-Biddeford, ME MSA	1	0.1%
313	Iron Mountain, MI-WI MSA	1	0.1%
314	Houghton, MI MSA	1	0.1%
315	Traverse City, MI MSA	1	0.1%
	N	**1,526**	**100.0%**

Table 49: All zip codes collected by MSA 9/9

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