Hilton Head Island Visitor Profile Survey

2021

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CHAMBER OF COMMERCE

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SCHOOL OF BUSINESS
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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Baby Boomers represented 49.9% of the respondents, followed by Gen X (22.0%), and then Millennials (21.8%). Over 56% of those surveyed had a Bachelor's degree or higher, and more than 50% had an annual household income of $100,000 or more per year. Also, just over three-fourths of the respondents were married. Based on a comparison with the prior survey, these characteristics suggest a trend towards younger travelers visiting the area.

POINT OF ORIGIN

The respondents resided in 380 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the US, stretching from east to west coast. More respondents resided in Ohio than any other state (11.3%). Second was Pennsylvania (7.1%), followed then by New York (6.2%), Georgia (5.9%), North Carolina and California (4.7% each), Florida (4.0%), and then Virginia (3.8%). In-state visitors did not make up a significantly large portion of the respondents (3.3%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ-PA; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Pittsburgh, PA; Washington-Arlington-Alexandria, DC-VA-MD-WV; Cleveland-Elyria, OH; Los Angeles-Long Beach-Anaheim, CA; and Cincinnati, OH-KY-IN.

Canada remains the top international origin market amongst respondents (49.3%), followed by Europe (17.3%) and Asia (9.3%).

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (75.4%), relaxation (51.5%), and spending time with family (46.6%), followed by biking (16.4%), golf (13.7%), and culinary experiences (12.2%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include shopping, nature-based activities, and water excursions.

Of those surveyed, 38.5% of overnight visitors and 57.8% of day trip visitors indicated they had visited Hilton Head Island, SC for the first time, suggesting that the destination continues to appeal to new visitors.

TRIP CHARACTERISTICS

The average group size of those surveyed was 3.8 for overnight visitors and 2.1 for day trip visitors. The main mode of transportation to the island continues to be personal/family car (67.6%). However, flying into the destination increased notably from the prior survey (19.5% to 25.5%), with the proportion of visitors flying into Hilton Head Island Airport rising substantially (12.8% to 39.8%).

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.9 nights, hotel visitors stayed 5.5 nights, timeshare visitors stayed 8.3 nights, and second homeowners stayed 10.4 nights. The overall average was 6.7 nights.

Home/villa rental continues to be the most popular choice of accommodation for overnight visitors (37.2%), followed by resorts (20.9%), hotels (15.0%), timeshares (14.2%), and second homes (4.3%).

TRAVEL PLANNING

VRBO remains by far the most popular online booking platform for villas/homes (34.2%), followed by local vacation rental companies (22.9%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (15.1%). The percentage of respondents booking via Airbnb increased significantly from the prior survey (2.4% to 10.0%).

Other destinations like the Outer Banks, NC; Myrtle Beach, SC; and Gulf Shores, AL remain competitors for Hilton Head Island as alternative beach destinations. The top competing city market was Charleston, SC.

Top reasons for choosing to visit Hilton Head Island were previous visitation (60.0%), beach destination (49.7%), word-of-mouth/recommendation (24.1%), within driving distance of home (23.9%), and wanting to visit somewhere safe during/after COVID-19 (19.0%).

Of those visitors surveyed, 89.3% indicated an intention to return to visit Hilton Head Island.

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 one to five 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 (56.6%) 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 (91.3%), relaxation & rejuvenation (88.8%), passive outdoor adventures (76.7%), historical attractions (73.7%), and romantic couple-getaways (70.6%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (92.7%), ease of access (89.0%), quality of lodging and dining options (89.1% and 88.6%), affordability (87.6%), diversity of dining and lodging options (84.9% and 70.8%), and low traffic congestion (69.3%).

METHODOLOGY

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.hiltonheadisland.org or www.visitbluffton.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 the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 2,084 completed surveys were collected. This report is based largely on the 1,040 respondents who visited Hilton Head Island as an overnight or day trip, along with individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton.

This report presents the results of the present study, together with comparative results from the last time this study was completed, in 2020. Because the prior (2020) report looked at visitation that occurred primarily in 2019, such results are labelled as "2019" throughout this report, rather than as "2020," which is how they were labelled in the prior report. Likewise, the data from the current survey are labelled as 2021 because the vast majority of these respondents visited in 2021. When 2019 data is not presented, it is because the question was not asked in the previous survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2019 and 2021. The estimates are based on secondary data for hotel, timeshare, and villa visitors, as well as primary data collected regarding second homeowners, their guests, and day trippers.

Visitor Segment	2019	2021	Change (%)
Villa/Home Rentals	755,953	962,686	27.3%
Hotels/Resorts	473,679	508,977	7.5%
Timeshares	454,093	481,934	6.1%
Second Homeowners	613,216	719,302	17.3%
Non-paying Guests	159,137	186,667	17.3%
Day trippers	228,250	267,290	17.1%
Total Visitors	**2,684,328**	**3,126,856**	**16.5%**

Table 1: Visitor Estimates for 2019 and 2021

SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021
Gender		
Female	67.4%	62.5%
Male	32.6%	37.4%
Self-identify	-	0.1%
Marital Status		
Married	76.7%	76.7%
Single	8.5%	9.2%
Divorced	7.4%	7.7%
Living as Married	3.8%	-
Widowed	3.1%	5.3%
Separated	0.5%	1.1%
Education (highest level completed)		
Grade School	0.2%	0.7%
High School	8.0%	8.0%
Some College	19.6%	20.9%
Associates Degree (2 years)	13.1%	13.6%
Bachelor's Degree (4 years)	31.5%	32.9%
Graduate Degree (Post degree/MA)	26.9%	23.8%
Age		
19 years or younger	0.1%	0.1%
20 to 29 years	0.9%	10.5%
30 to 39 years	5.9%	16.5%
40 to 49 years	15.3%	12.6%
50 to 59 years	26.8%	18.7%
60 to 69 years	34.4%	25.8%
70 years and over	15.9%	14.5%
Not Applicable	0.6%	1.4%
Household Income		
Under $24,999	1.4%	2.3%
$25,000-$34,999	1.8%	6.3%
$35,000-$49,999	5.5%	7.7%
$50,000-$74,999	12.6%	15.7%
$75,000-$99,999	14.6%	17.7%
$100,000-$149,999	22.1%	24.6%
$150,000-$199,999	11.3%	13.0%
$200,000-$249,999	5.8%	5.9%
$250,000 or more	6.2%	6.8%
Not Applicable	18.8%	-
N	1,682	1,884

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	83	5.7%
2	Atlanta-Sandy Springs-Roswell, GA	49	3.4%
3	Chicago-Naperville-Elgin, IL-IN-WI	38	2.6%
4	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	38	2.6%
5	Pittsburgh, PA	35	2.4%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV	32	2.2%
7	Cleveland-Elyria, OH	31	2.1%
8	Los Angeles-Long Beach-Anaheim, CA	30	2.1%
9	Cincinnati, OH-KY-IN	29	2.0%
10	Boston-Cambridge-Newton, MA-NH	25	1.7%
11	Columbus, OH	25	1.7%
12	Detroit-Warren-Dearborn, MI	23	1.6%
13	Dallas-Fort Worth-Arlington, TX	22	1.5%
14	Charlotte-Concord-Gastonia, NC-SC	19	1.3%
15	Indianapolis-Carmel-Anderson, IN	18	1.2%
16	St. Louis, MO-IL	15	1.0%
17	Youngstown-Warren-Boardman, OH-PA	15	1.0%
18	Minneapolis-St. Paul-Bloomington, MN-WI	14	1.0%
19	Buffalo-Cheektowaga-Niagara Falls, NY	13	0.9%
20	Louisville/Jefferson County, KY-IN	13	0.9%
21	Baltimore-Columbia-Towson, MD	12	0.8%
22	Nashville-Davidson--Murfreesboro--Franklin, TN	12	0.8%
23	Augusta-Richmond County, GA-SC	11	0.8%
24	Miami-Fort Lauderdale-West Palm Beach, FL	11	0.8%
25	Omaha-Council Bluffs, NE-IA	11	0.8%
26	Raleigh, NC	11	0.8%
27	Akron, OH	10	0.7%
28	Denver-Aurora-Lakewood, CO	10	0.7%
29	Kansas City, MO-KS	10	0.7%
30	Providence-Warwick, RI-MA	10	0.7%
	Other	780	53.6%
	Total	1,455	

Table 3: ZIP Code Analysis – Top 30 MSAs

International Markets

Figure 1: International Markets by Year
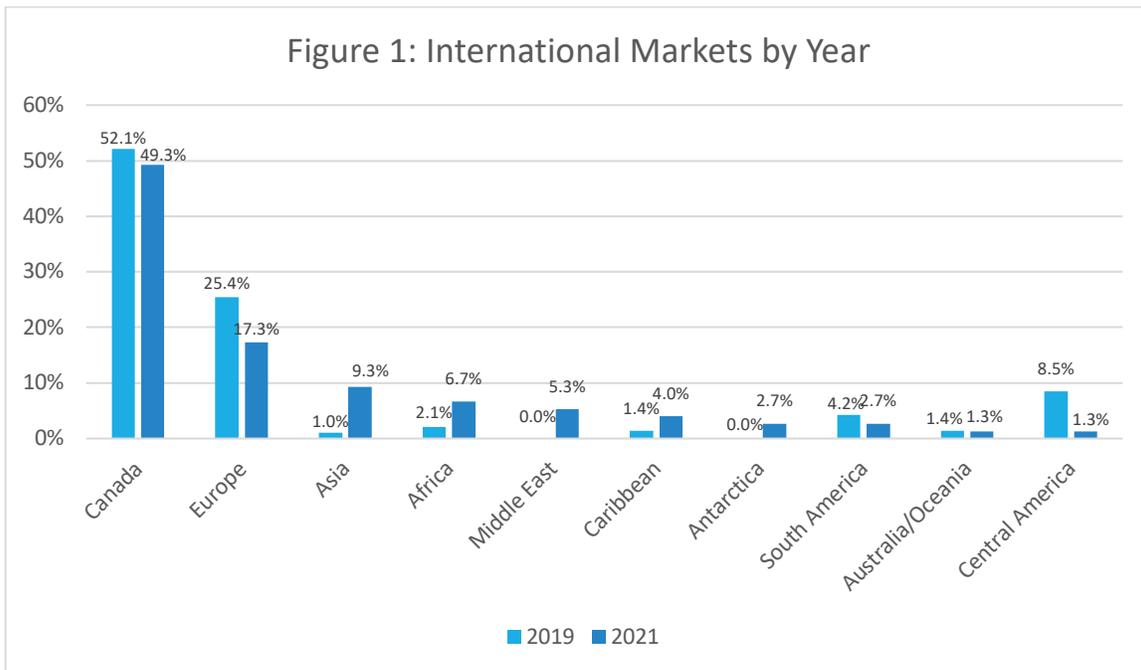
	2019	2021
Canada	52.1%	49.3%
Europe	25.4%	17.3%
Asia	1.0%	9.3%
Africa	2.1%	6.7%
Middle East	0.0%	5.3%
Caribbean	1.4%	4.0%
Antarctica	0.0%	2.7%
South America	4.2%	2.7%
Australia/Oceania	1.4%	1.3%
Central America	8.5%	1.3%
N	71	75

Table 4: International Markets by Year

Travel to the Hilton Head Island / Bluffton Area

Within the last 12 months have you traveled or taken a vacation?[1]

Figure 2: Travel Frequency by Year
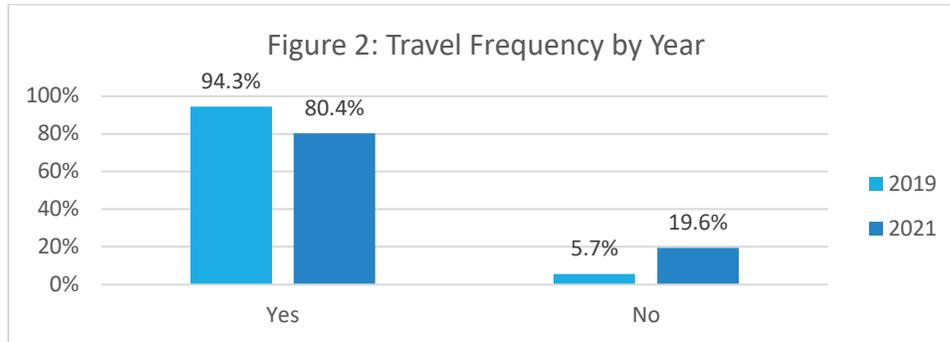
	2019	2021
Yes	94.3%	80.4%
No	5.7%	19.6%
N	1,684	2,084

TABLE 5: Travel Frequency by Year

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

Figure 3: Hilton Head Island Area Visitation by Year
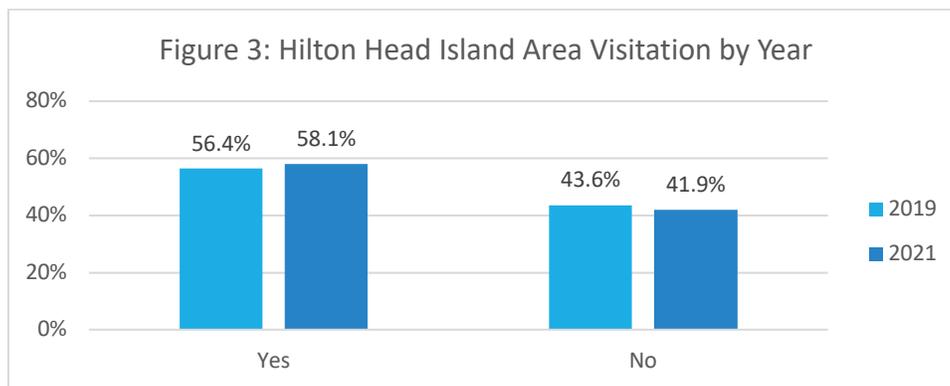
	2019	2021
Yes	56.4%	58.1%
No	43.6%	41.9%
N	1,713	2,084

TABLE 6: Hilton Head Island Area Visitation by Year

[1] In the previous report, these questions asked about the last 18 months instead of the last 12 months.

HILTON HEAD ISLAND VISITORS

Was that your first time visiting Hilton Head Island?

Figure 4: First Time Visitor vs. Repeat Visitor by Year
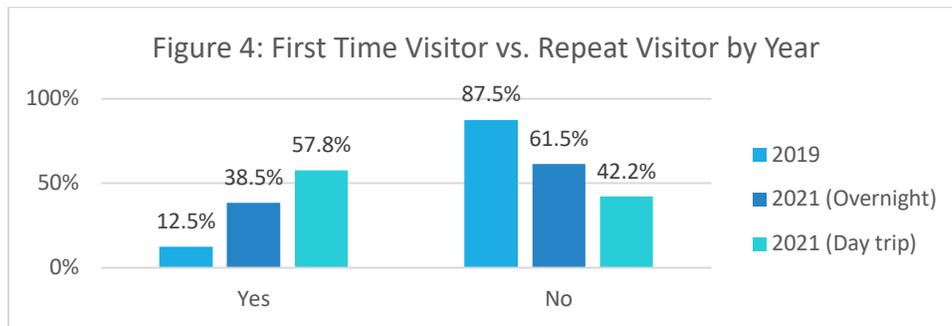
	2019	2021 (Overnight)	2021 (Day trip)
Yes	12.5%	38.5%	57.8%
No	87.5%	61.5%	42.2%
N	946	991	45

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

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

Figure 5: Reservation Lead Time (Overnight Visitors)
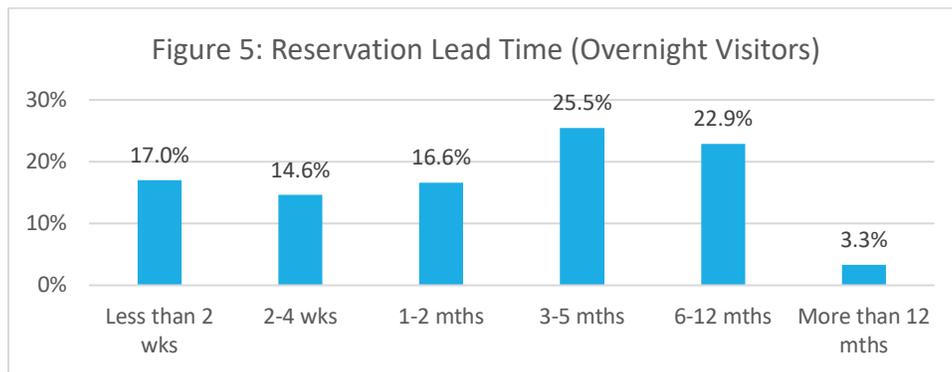
Less than 2 weeks	17.0%
2 weeks to 4 weeks	14.6%
1 to 2 months	16.6%
3 to 5 months	25.5%
6 to 12 months	22.9%
More than 12 months	3.3%
N	991

TABLE 8: Reservation Lead Time

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

	2020 Report	Current report (Overnight)	Current report (Day trip)
2018	12.9%		
2019	77.8%		
2020	9.3%	14.1%	26.5%
2021		85.9%	73.5%
N	951	1,040	34

TABLE 9: Visitation Year by Year

	2020 Report	Current report (Overnight)	Current report (Day trip)
January	9.5%	1.9%	0.0%
February	2.2%	3.0%	2.9%
March	5.3%	5.3%	8.6%
April	8.9%	11.5%	5.7%
May	5.8%	12.0%	5.7%
June	10.4%	17.8%	31.4%
July	10.6%	20.0%	25.7%
August	12.3%	5.8%	2.9%
September	10.2%	7.2%	5.7%
October	11.4%	6.5%	8.6%
November	7.2%	4.7%	0.0%
December	6.2%	4.3%	2.9%
N	951	1,504	34

TABLE 10: Visitation by Month by Year

Figure 6: Visitation by Month by Year
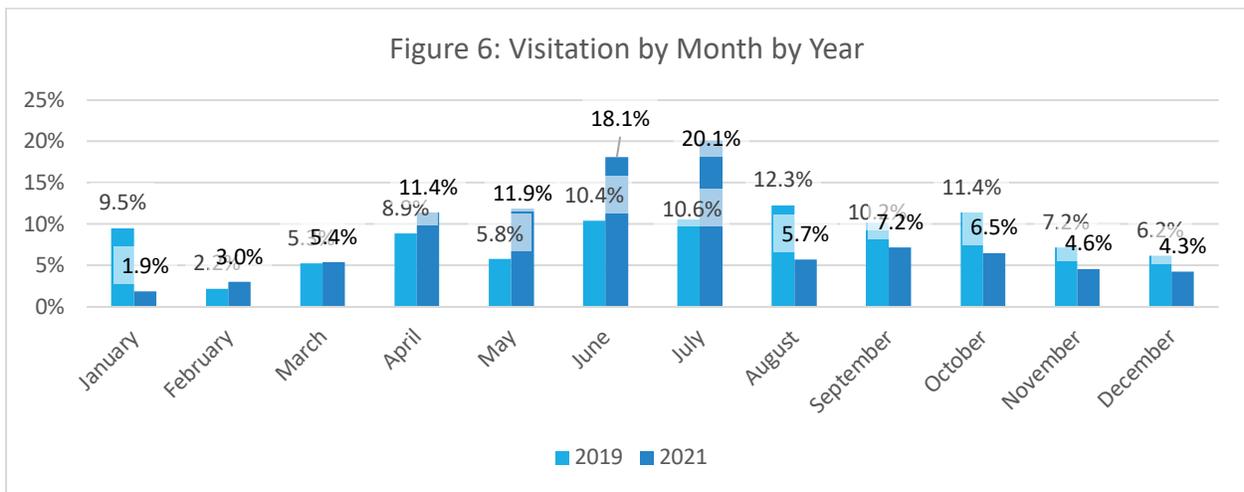
Note: For the previous survey, data collection occurred exclusively in January/February, whereas for the current report data collection occurred on a continuous basis from June onwards.

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

Figure 7: Length of Stay by Year
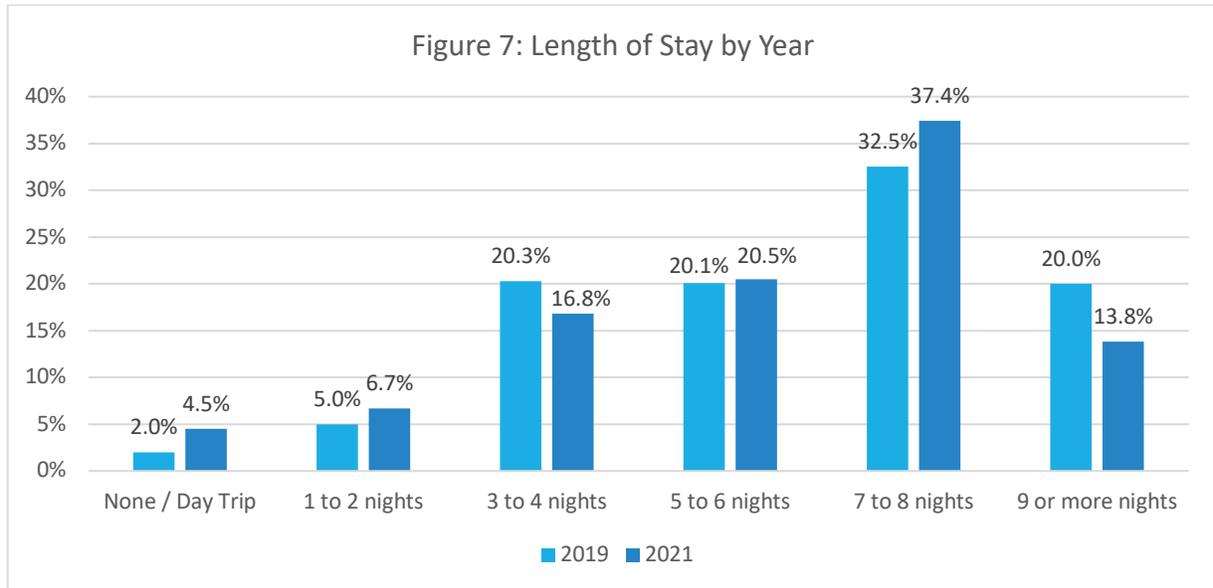
	2019	2021
None/day trip only	2.0%	4.5%
1 night	1.9%	1.8%
2 nights	3.1%	4.9%
3 nights	10.3%	7.5%
4 nights	10.0%	9.3%
5 nights	7.7%	9.6%
6 nights	12.4%	10.9%
7 nights	30.4%	34.0%
8 nights	2.1%	3.4%
9 nights	2.3%	2.6%
10 nights	3.4%	3.1%
11 nights	0.5%	0.4%
12 nights	0.8%	0.9%
13 nights	0.6%	0.7%
14 nights	4.8%	4.2%
15 nights	0.5%	0.8%
More than 15 nights	7.1%	1.1%
N	950	996

TABLE 11: Length of Stay by Year

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

Figure 8: Average Travel Party Size by Year
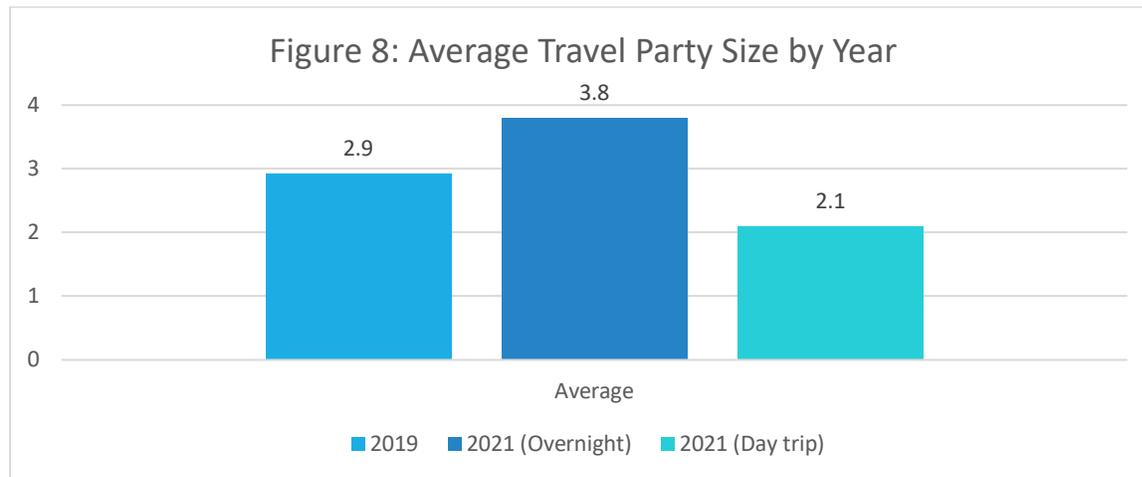
	2019	2021 (Overnight)	2021 (Day trip)
Average	2.9	3.8	2.1
N	951	995	45

TABLE 12: Travel Party Size by Year

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

Age		0	1	2	3	4	5	6 or more
Overnight	**Under 18**	62.0%	11.6%	12.8%	3.3%	1.4%	0.7%	1.4%
	18-24	77.1%	8.2%	4.2%	1.7%	0.7%	0.3%	1.1%
	25-34	71.5%	9.8%	7.4%	1.6%	1.0%	0.8%	0.8%
	35-44	67.1%	9.6%	11.8%	1.3%	1.1%	1.1%	0.9%
	45-54	68.3%	10.6%	12.0%	0.9%	0.6%	0.3%	0.3%
	55-64	61.8%	13.8%	15.5%	0.8%	0.8%	-	0.3%
	65+	61.2%	10.2%	19.1%	0.8%	1.1%	0.2%	0.4%
Day Trip	**Under 18**	75.6%	6.7%	8.9%	-	2.2%	-	-
	18-24	77.8%	11.1%	4.4%	-	-	-	-
	25-34	66.7%	2.2%	24.4%	-	-	-	-
	35-44	82.2%	6.7%	4.4%	-	-	-	-
	45-54	73.3%	6.7%	13.3%	-	-	-	-
	55-64	73.3%	11.1%	4.4%	-	2.2%	-	2.2%
	65+	73.3%	11.1%	8.9%	-	-	-	-

TABLE 13: Travel Party Ages by Year

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

Figure 9: Trip Purpose of Overnight Visitors
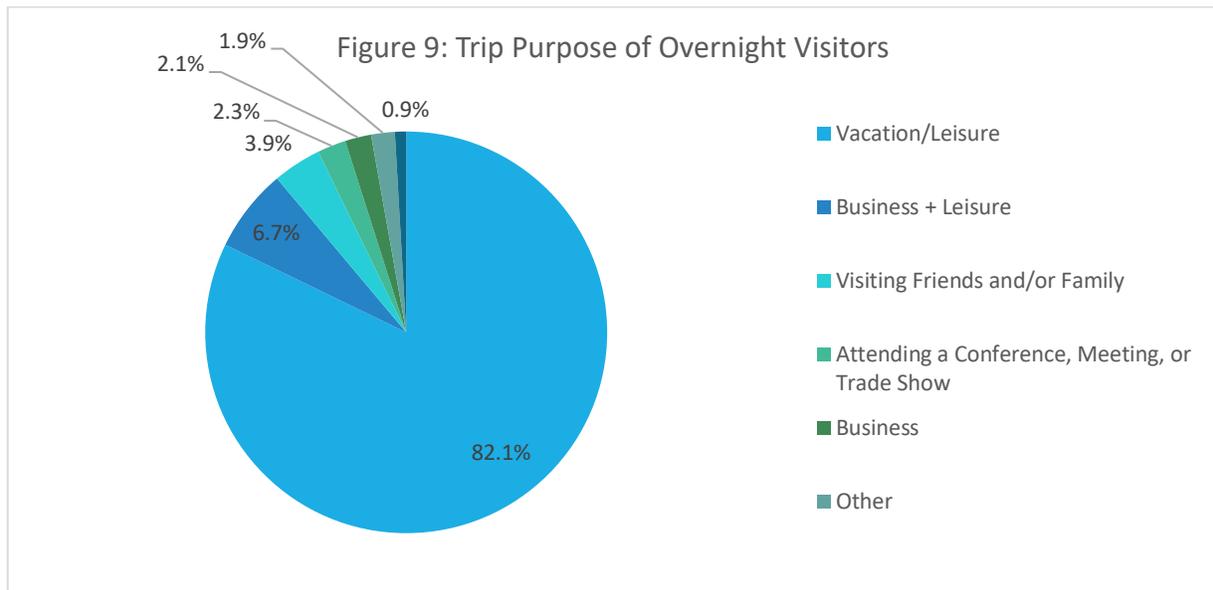
	2021
Vacation/Leisure	82.1%
Business + Leisure	6.7%
Visiting Friends and/or Family	3.9%
Attending a Conference, Meeting, or Trade Show	2.3%
Business	2.1%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%
Other[2]	1.9%
N	995

TABLE 14: Trip Purpose of Overnight Visitors

[2] Other responses for trip purpose include research for relocation to HHI, golf or tennis tournament, birthday or anniversary trip.

Day Trip Visitors:

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

Part of a vacation	57.8%
Day trip from home	42.2%
N	45

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

Where did you stay overnight?

Savannah	42.3%
Beaufort	19.2%
Charleston	19.2%
Tybee Island	7.7%
Fripp Island	3.8%
Jacksonville	3.8%
Other	3.8%
N	26

TABLE 16: Day Trip Visitors' Overnight Location

Overnight Visitors:

What was your primary form of accommodation while visiting Hilton Head Island?

Figure 10: Type of Accommodation by Year
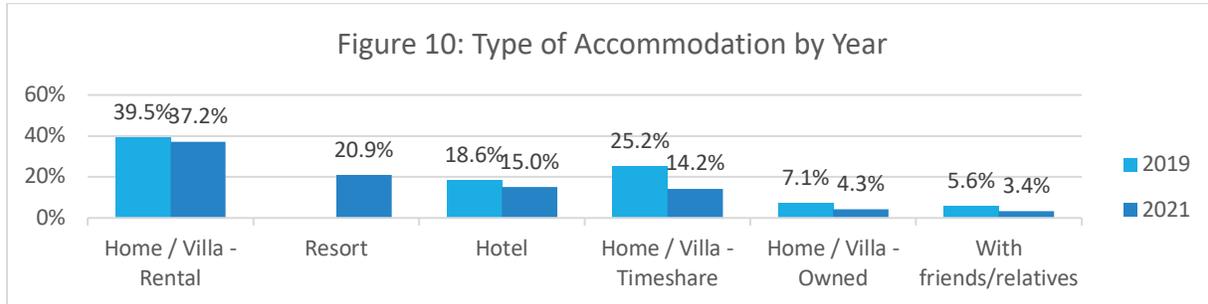
	2019	2021
Home / Villa - Rental	39.5%	37.2%
Resort	-	20.9%
Hotel	18.6%	15.0%
Home / Villa - Timeshare	25.2%	14.2%
Home / Villa - Owned	7.1%	4.3%
With friends/relatives	5.6%	3.4%
RV park	1.1%	0.4%
Other	1.4%	0.3%
None – Day Trip only	1.7%	4.3%
N	951	1040

TABLE 17: Types of Accommodation by Year

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

Hampton Inn	15.8%
Sonesta Resort	11.7%
Hilton Head Beach and Tennis Resort	5.8%
Disney's Hilton Head Island Resort	5.2%
The Westin Hilton Head Island Resort & Spa	4.5%
Marriott	4.1%
Hilton Grand Vacations Club	3.8%
Grand Hilton Head Inn	3.4%
Omni Hilton Head Resort	3.4%
Marriott Grande Ocean	3.1%
Other Hotels/Resorts	39.2%
N	291

TABLE 18: Top 10 Hotels or Resorts

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

	2019	2021
VRBO	32.8%	34.2%
Local vacation rental company	22.7%	22.9%
Directly with the resort	11.2%	15.1%
Airbnb	2.4%	10.0%
Directly with owner		6.2%
Vacasa		4.9%
HomeAway		2.2%
Other	23.5%	1.6%
TurnKey		1.3%
Booking.com		0.3%
I don't remember	3.5%	0.8%
None		0.5%
N		371

TABLE 19: Booking Platforms for Home/Villa Rental

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

	2019	2021 (Overnight)	2021 (Day trip)
Car - Personal/Family	79.5%	67.6%	68.9%
Car - Rental	14.7%	15.0%	17.8%
Plane - Non-stop commercial flight	19.5%[3]	14.8%	-
Plane - Multi-leg commercial flight	-	10.7%	-
Personal RV	1.1%	2.2%	-
Motor Coach/Tour bus	0.0%	1.5%	6.7%
Plane - Private	0.2%	0.7%	13.3%
Other	0.6%	0.6%	-
N	953	995	45

TABLE 20: Modes of Transportation to Hilton Head Island

Figure 11: Modes of Transportation to Hilton Head Island
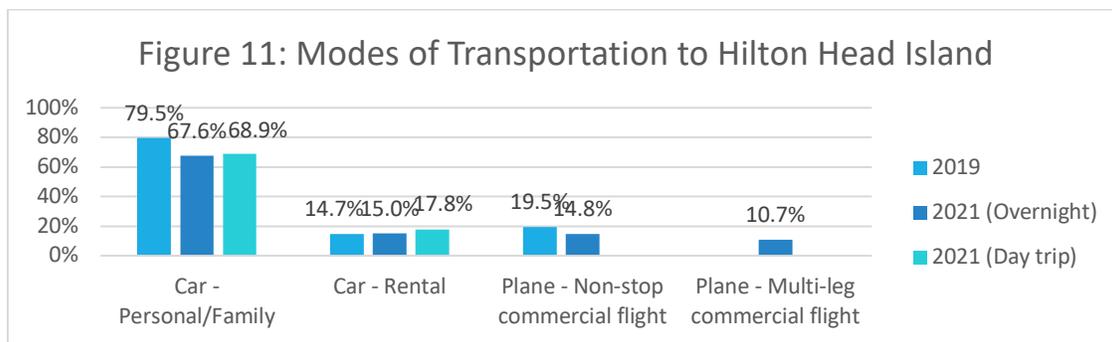
Visitors Arriving by Plane:

At which airport did you land?

	2019	2021
Savannah/Hilton Head Island International	69.5%	40.6%
Hilton Head Island	12.8%	39.8%
Charleston	9.2%	8.8%
Atlanta	2.8%	5.6%
Charlotte	1.4%	2.0%
Jacksonville	1.4%	2.0%
Other	2.8%	1.2%
N	114	251

TABLE 21: Arrival Airport by Year

Which commercial airline did you use?

American Airlines	38.9%
Delta	16.6%
Allegiant	10.1%
Southwest	8.1%
United	6.9%
JetBlue	6.5%
Air Canada	5.3%
Alaska	2.8%
Frontier	1.6%
Breeze	1.2%
Silver Airways	0.8%
Frontier	0.4%
Spirit	0.4%
Sun Country Airlines	0.4%
N	247

TABLE 22: Commercial Airlines Used

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[3] Previous survey did not divide commercial flights into non-stop and multi-leg, so stated percentage is for all commercial flights.

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

Figure 12: Transportation used while on Hilton Head Island
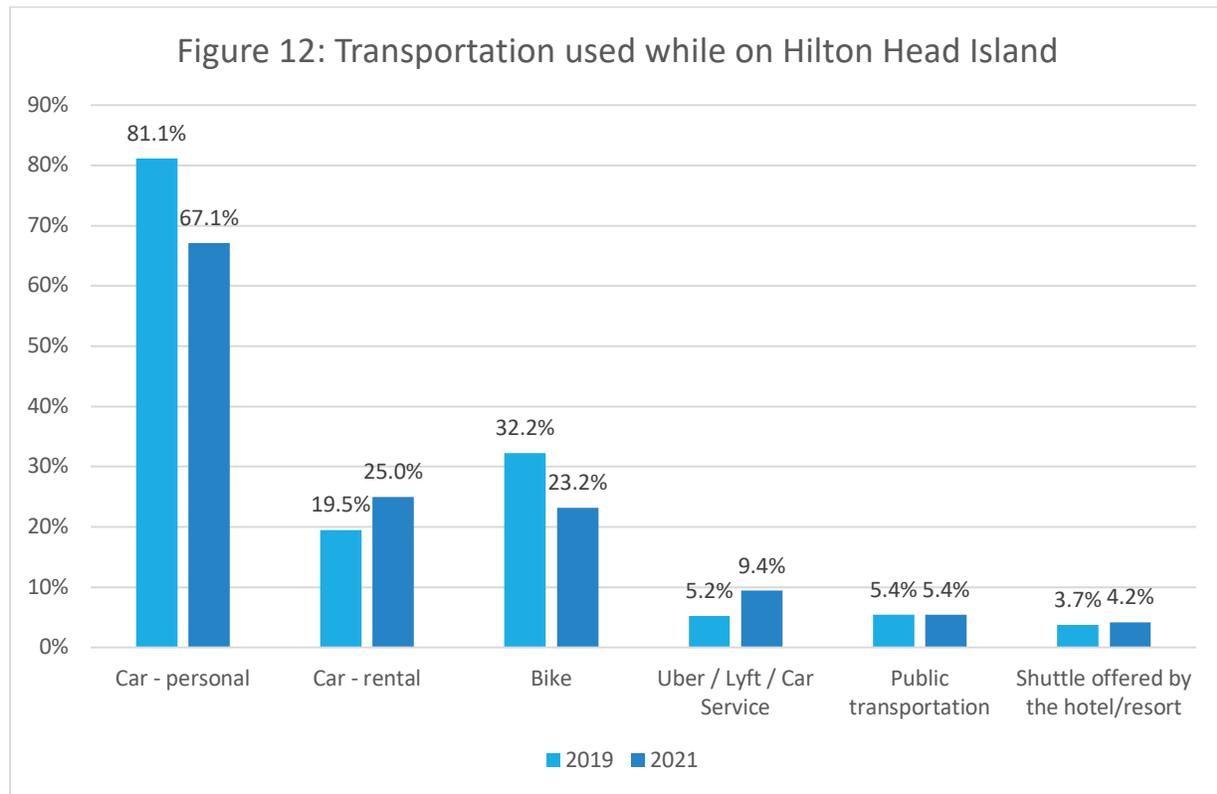
	2019	2021
Car – personal	81.1%	67.1%
Car – rental	19.5%	25.0%
Bike	32.2%	23.2%
Car service	-	5.5%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%
Shuttle offered by the hotel/resort	3.7%	4.2%
Uber	4.1%	2.9%
On Foot	-	1.4%
Lyft	1.1%	1.0%
Mobility Scooter	-	0.1%
N	948	995

TABLE 23: Transportation Used While on Hilton Head

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

	Villa Rental	Hotel	Timeshare	Second Homeowner	Non-paying Guests	Day Trip	Overall
Transportation	$142	$243	$118	$175	$88	$44	$170
Lodging	$2,248	$1,135	$787	$0	$0	$0	$1,746
Food - Dining	$579	$673	$507	$637	$328	$69	$584
Food - Grocery	$281	$214	$199	$257	$168	$48	$244
Shopping	$270	$552	$264	$155	$209	$120	$369
Spas	$11	$99	$16	$78	$17	$50	$48
Golf	$82	$76	$103	$159	$122	$9	$85
Biking	$59	$45	$30	$66	$15	$5	$47
Performance/Visual Arts	$9	$39	$8	$50	$47	$9	$23
Festivals	$11	$36	$18	$27	$8	$11	$22
Museums/Historical Tours	$16	$38	$39	$75	$30	$15	$30
Boating/Sailing/Fishing	$123	$57	$64	$44	$10	$8	$79
Nature-based Activities	$11	$40	$32	$28	$5	$14	$25
Dolphin Tours	$23	$40	$20	$67	$3	$6	$30
Tennis	$10	$24	$9	$28	$6	$5	$15
Other Expenses	$48	$166	$23	$46	$85	$9	$86
Total Expenditure	**$3,924**	**$3,477**	**$2,238**	**$1,891**	**$1,140**	**$421**	**$3,603**

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

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

	2019	2021 (Overnight)	2021 (Day trip)
Beaches	73.5%	75.4%	55.6%
Relaxation	58.6%	51.5%	31.1%
Time with family/friends	48.4%	46.6%	24.4%
Biking	15.7%	16.4%	11.1%
Golf	16.3%	13.7%	8.9%
Culinary	13.9%	12.2%	31.1%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	11.3%	12.0%	2.2%
Shopping	11.7%	10.9%	24.4%
Boating / Sailing / Kayaking	1.6%	7.5%	11.1%
Heritage attractions / Museum / Historical tours	3.3%	6.5%	20.0%
Business trip (convention, meeting, etc.)	1.2%	5.1%	4.4%
Attend sporting event	0.6%	4.7%	15.6%
Festivals	4.0%	3.6%	6.7%
Health/wellness/fitness	2.1%	3.4%	11.1%
Parks	1.4%	1.8%	6.7%
Tennis	2.1%	1.7%	6.7%
Wedding	-	1.2%	-
Other	8.1%	4.1%	-
N	953	995	45

TABLE 25: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021 (Overnight)	2021 (Day trip)
Beaches	83.2%	81.8%	42.2%
Relaxation	78.0%	68.7%	40.0%
Time with family/friends	70.5%	59.0%	37.8%
Shopping	69.1%	58.1%	46.7%
Biking	37.3%	40.5%	6.7%
Culinary	40.1%	29.1%	31.1%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%
Golf	23.8%	18.7%	8.9%
Water excursions	24.4%	17.6%	17.8%
Museum / Historical tours	17.8%	15.7%	11.1%
Health / Wellness / Fitness	12.6%	12.8%	4.4%
Business/work	2.5%	7.1%	13.3%
Festivals	13.4%	6.5%	6.7%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%
Spas	8.0%	5.1%	6.7%
Attend sporting event	2.3%	4.9%	8.9%
Tennis	5.9%	4.9%	-
Sports activities	8.1%	4.4%	8.9%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%
Other	3.9%	2.0%	-
N	950	995	45

TABLE 26: Activities Visitors Participated In

Which shopping locations did you visit?

	2019	2021 (Overnight)	2021 (Day trip)
Coligny Plaza	68.8%	64.7%	26.7%
Harbour Town	60.2%	55.8%	26.7%
Shelter Cove Harbour	47.8%	42.0%	17.8%
Tanger Outlets	53.2%	34.9%	37.8%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%
Downtown Bluffton	30.5%	25.4%	28.9%
South Beach Marina	25.2%	21.5%	11.1%
Main Street Village	25.0%	20.2%	8.9%
Village at Wexford	16.4%	10.9%	6.7%
Buckwalter shopping areas	2.9%	4.9%	11.1%
Other	5.5%	2.1%	2.2%
None	2.1%	1.5%	2.2%
N	945	995	45

TABLE 27: Shopping Locations Visited

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

Bluffton	37.0%
Savannah	29.3%
Beaufort	17.7%
Charleston	15.7%
Daufuskie Island	13.0%
Tybee Island	7.3%
Jacksonville	5.4%
Other	0.9%
I did not visit any other cities.	28.8%
N	995

TABLE 28: Other Cities Visited While on Hilton Head

TRAVEL PLANNING

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

Figure 13: Consideration of Alternative Destinations
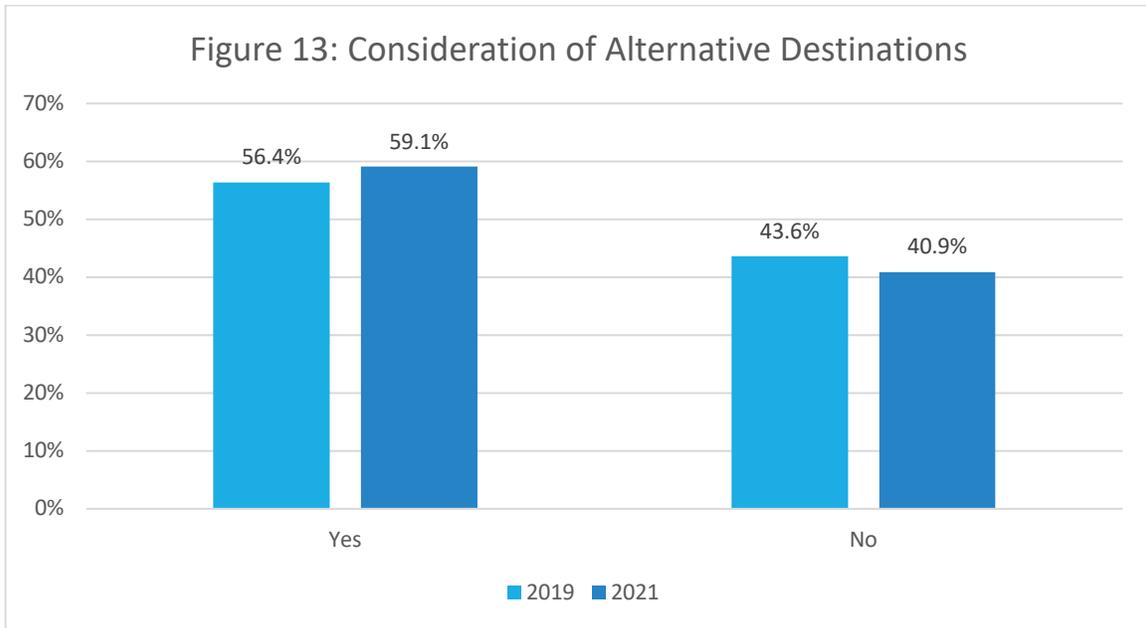
	2019	2021
Yes	56.4%	59.1%
No	43.6%	40.9%
N	1,691	1,039

TABLE 29: Consideration of alternative destinations by year

Which of the following destinations did you consider visiting?

	2019	2021
Outer Banks, NC	22.6%	28.9%
Charleston, SC	45.2%	24.2%
Alabama Golf Trail	1.6%	23.8%
Caribbean	12.5%	23.1%
Myrtle Beach, SC	37.5%	20.5%
Savannah, GA	33.9%	20.0%
Gulf Shores, AL	14.9%	19.8%
Orlando, FL	12.1%	19.3%
Isle of Palms, SC	12.5%	18.1%
Hawaiian Islands	4.8%	15.8%
Kiawah Island, SC	14.1%	15.5%
Tybee Island, GA	18.2%	14.6%
Marco Island/Naples, FL	12.1%	14.4%
Sanibel Island, FL	13.7%	13.4%
Jekyll Island, GA	12.5%	13.2%
The Florida Keys	19.4%	12.5%
Aspen, CO	2.0%	11.5%
Sea Island, GA	4.8%	10.4%
St. Simons Island, GA	-	10.1%
Pinehurst, NC	3.2%	9.9%
Tampa/St. Petersburg, FL	10.1%	9.6%
Sandestin, FL	8.5%	9.2%
Reynolds Plantation, GA	1.2%	8.9%
Ponte Vedre, FL	3.6%	8.5%
Napa/Sonoma, CA	2.8%	8.5%
Telluride, CO	0.8%	7.8%
Sarasota, FL	6.9%	7.3%
Santa Fe, NM	1.6%	2.8%
Bluffton, SC	0.0%	1.9%
Other	11.3%	13.2%
Total	248	425

TABLE 30: Alternative Destinations by Year

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

	2019	2021
Had visited in the past and wanted to return.	80.3%	60.0%
Wanted to visit a beach destination.	48.3%	49.7%
It was recommended by friends/family.	18.2%	24.1%
Wanted to visit some place within driving distance.	22.7%	23.9%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%
Wanted to visit someplace new.	8.6%	18.1%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%
Wanted to visit heritage attractions.	4.6%	7.8%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%
Wanted to attend a sporting event.	1.7%	2.9%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%
Other	14.2%	8.5%
Total	953	1,039

TABLE 31: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

	2021
Very likely	74.3%
Likely	15.0%
Neutral	7.6%
Unlikely	1.9%
Very Unlikely	1.3%
Total	1,027

TABLE 32: Likelihood of Visiting Hilton Head Island Again

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

	2021
Definitely Recommend	79.7%
Probably Recommend	14.9%
May or May Not Recommend	4.9%
Probably Not Recommend	0.5%
Definitely Not Recommend	0.0%
Total	1,034

TABLE 33: Likelihood of Recommending a Visit to Hilton Head Island

Non-Visitors

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

Figure 14: Reasons for Not Visiting
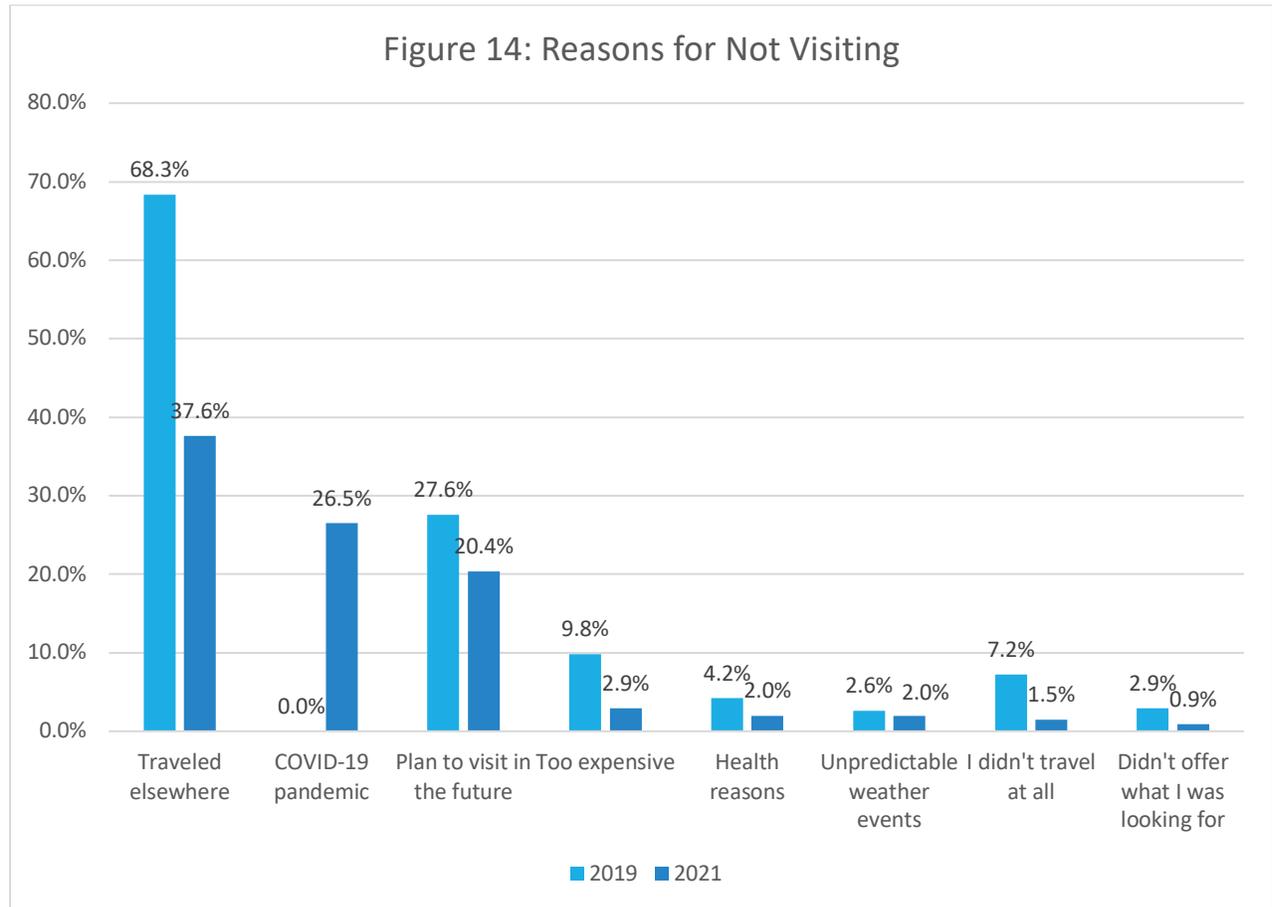
	2019	2021
Traveled elsewhere	68.3%	37.6%
COVID-19 pandemic	-	26.5%
Plan to visit in the future	27.6%	20.4%
Too expensive	9.8%	2.9%
Health reasons	4.2%	2.0%
Unpredictable weather events	2.6%	2.0%
I didn't travel at all	7.2%	1.5%
Didn't offer what I was looking for	2.9%	0.9%
Other	7.1%	6.2%
Total	736	860

TABLE 34: Reasons for not visiting

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

	2021
USA - Southeast (GA, FL, NC, SC)	26.9%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%
Latin America and Caribbean	2.1%
Canada	1.4%
Europe	1.2%
Asia	0.5%
Africa	0.3%
Australia/New Zealand	0.2%
Other	0.1%
Total	860

TABLE 35: Regions Visited by Non-Visitors in the Past 12 Months

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

	2019	2021
Never visited	33.0%	38.9%
1	25.3%	18.6%
2 to 5	34.2%	30.2%
6 to 10	7.4%[4]	9.8%
11 to 20	-	1.9%
21 or more	-	0.9%
Total	739	860

TABLE 36: Visitation Frequency in the Past 10 Years by Non-Visitors

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

	2019	2021
Yes, within one year	27.9%	49.2%
Yes, but not sure when	58.4%	42.5%
No	13.7%	8.3%
Total	649	859

TABLE 37: Plans of visiting Hilton Head Island in the Future by Non-Visitors

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[4] The prior survey's largest category response option was "6 or more".

TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2019	2021
0 to 1	10.6%	12.8%
2 to 4	59.3%	56.6%
5 to 7	17.0%	20.0%
8 to 10	6.1%	5.8%
More than 10	7.0%	4.9%
Total	1,684	1,884

TABLE 38: Frequency of Leisure/Vacation Trips

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

Figure 15: Preferred Travel Months
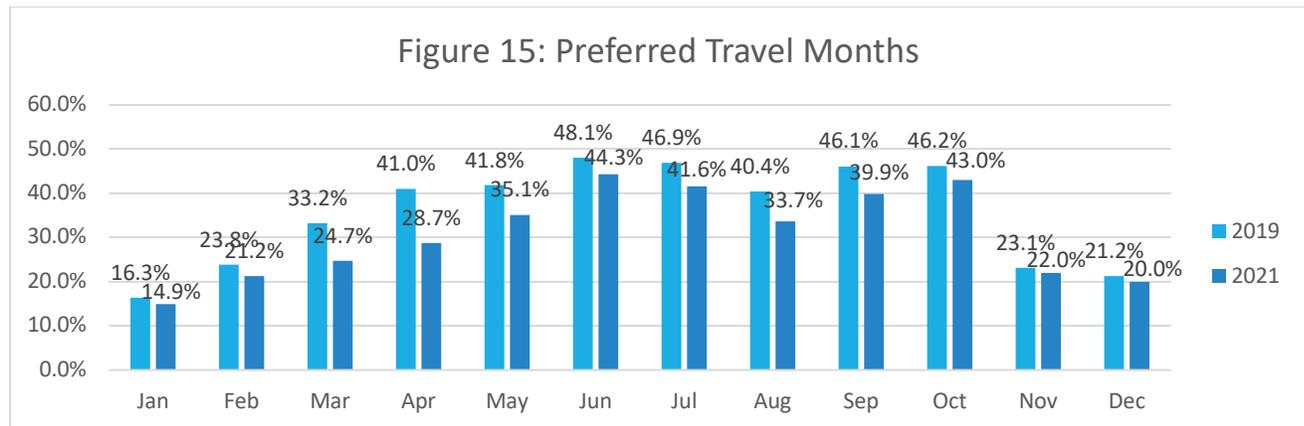
	2019	2021
January	16.3%	14.9%
February	23.8%	21.2%
March	33.2%	24.7%
April	41.0%	28.7%
May	41.8%	35.1%
June	48.1%	44.3%
July	46.9%	41.6%
August	40.4%	33.7%
September	46.1%	39.9%
October	46.2%	43.0%
November	23.1%	22.0%
December	21.2%	20.0%
Total	1,684	1,884

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"	2019	2021
Beaches	94.8%	91.3%
Relaxation & rejuvenation	94.4%	88.8%
Passive outdoor adventures	81.8%	76.7%
Historic attractions	83.9%	73.7%
Romantic couple getaways	71.1%	70.6%
Culinary experiences	73.2%	68.1%
Cultural experiences	74.2%	66.6%
Learning while traveling	69.9%	60.9%
Exploration	63.3%	55.7%
Warm weather sports	62.5%	53.0%
Water sports	45.2%	49.2%
Active outdoor adventures	44.2%	48.0%
Quality nightlife options	47.8%	47.9%
Spectator sporting events	42.7%	47.7%
Immersion excursions (living like locals)	50.8%	46.8%
Performing/cultural arts getaways	51.5%	46.7%
Art	47.3%	44.9%
Urban getaway	40.7%	43.8%
Theme parks	38.5%	42.6%
Medical/wellness	31.2%	39.1%
Waterparks	29.6%	37.4%
Golf getaways	28.9%	35.7%
Luxury camping ("glamping")	24.0%	35.7%
Winter sports	16.8%	26.7%
Voluntourism	17.8%	25.4%
Tennis getaways	9.2%	20.7%
Total	1,684	1,751

TABLE 40: Preferred Vacation/Leisure Travel Experiences

FIGURE 16: PREFERRED TRAVEL EXPERIENCES
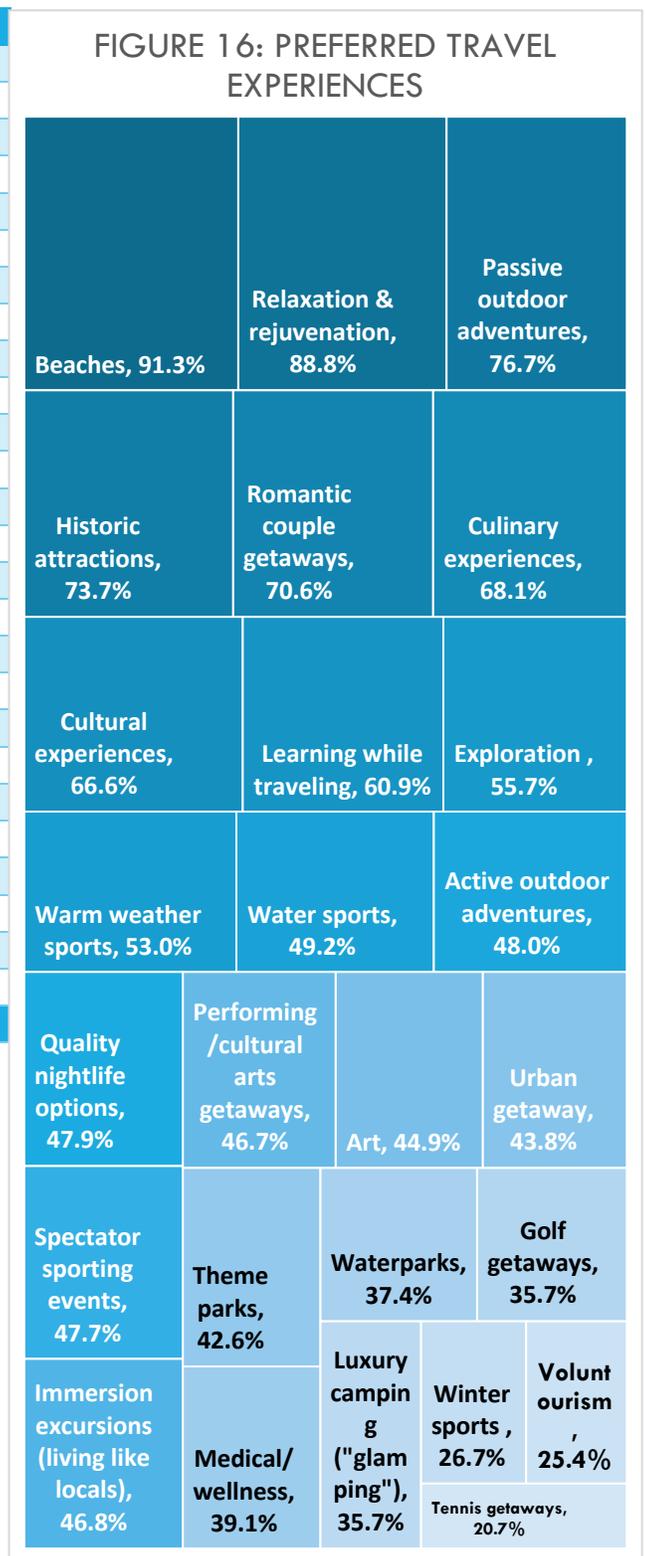
How important are the following attributes to you in choosing a leisure vacation?

Figure 17: Top Preferred Attributes for Travel
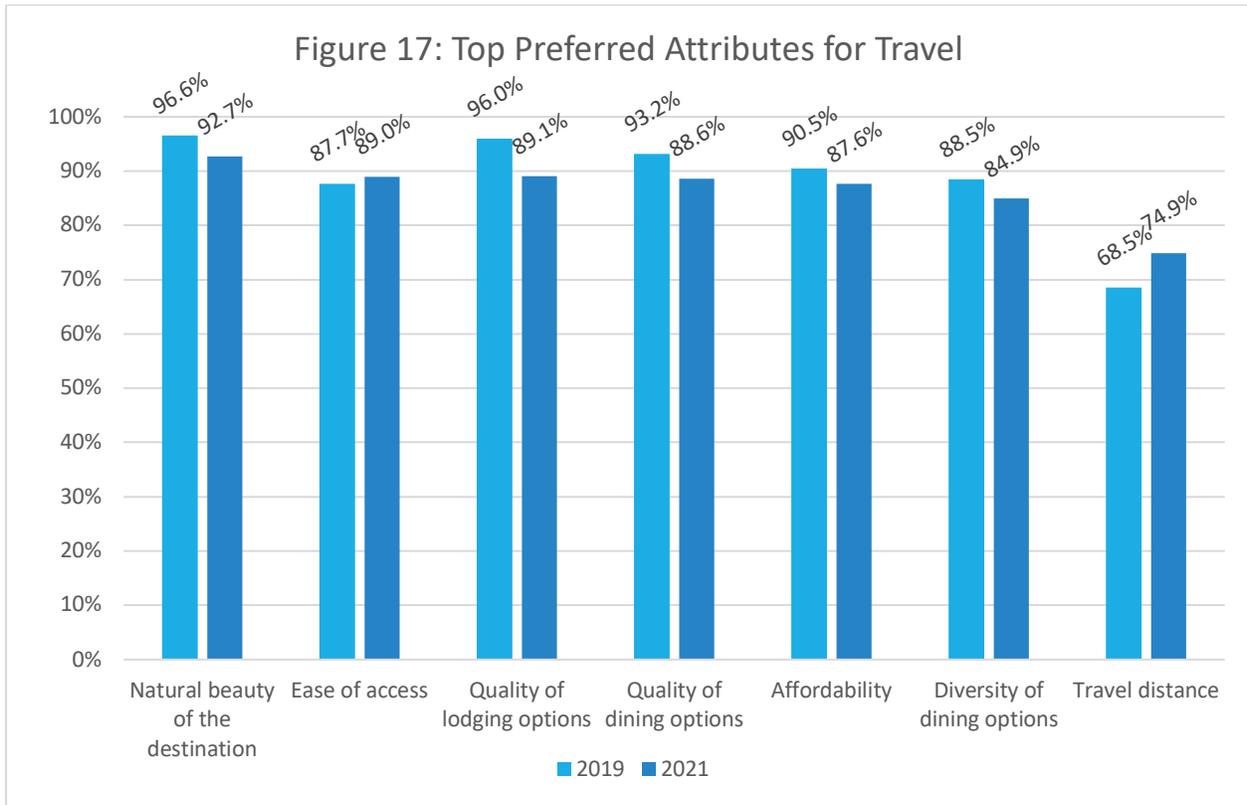
"Important" + "Very Important"	2019	2021
Natural beauty of the destination	96.6%	92.7%
Ease of access	87.7%	89.0%
Quality of lodging options	96.0%	89.1%
Quality of dining options	93.2%	88.6%
Affordability	90.5%	87.6%
Diversity of dining options	88.5%	84.9%
Travel distance	68.5%	74.9%
Diversity of lodging options	76.8%	70.8%
Low traffic congestion	67.0%	69.3%
Environmental/ecological sensitivity	56.6%	57.3%
Access to other cities in the surrounding area	58.5%	56.9%
Activities like events/festivals	63.5%	54.2%
Medical/wellness	38.4%	47.9%
Nightlife activity options	39.5%	44.2%
Public transportation	21.8%	30.3%
Total	1,683	1,751

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
I would rather rely on a travel agent or tour operator than make my own travel arrangements.	6.0%	10.0%	28.0%	33.2%	22.8%
I try to support the local economy of places that I visit.	35.5%	46.8%	11.4%	2.4%	3.9%
N 1,808					

TABLE 42: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
New York-Newark-Jersey City, NY-NJ-PA	83	5.7%
Atlanta-Sandy Springs-Roswell, GA	49	3.4%
Chicago-Naperville-Elgin, IL-IN-WI	38	2.6%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	38	2.6%
Pittsburgh, PA	35	2.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	32	2.2%
Cleveland-Elyria, OH	31	2.1%
Los Angeles-Long Beach-Anaheim, CA	30	2.1%
Cincinnati, OH-KY-IN	29	2.0%
Boston-Cambridge-Newton, MA-NH	25	1.7%
Columbus, OH	25	1.7%
Detroit-Warren-Dearborn, MI	23	1.6%
Dallas-Fort Worth-Arlington, TX	22	1.5%
Charlotte-Concord-Gastonia, NC-SC	19	1.3%
Indianapolis-Carmel-Anderson, IN	18	1.2%
St. Louis, MO-IL	15	1.0%
Youngstown-Warren-Boardman, OH-PA	15	1.0%
Minneapolis-St. Paul-Bloomington, MN-WI	14	1.0%
Buffalo-Cheektowaga-Niagara Falls, NY	13	0.9%
Louisville/Jefferson County, KY-IN	13	0.9%
Baltimore-Columbia-Towson, MD	12	0.8%
Nashville-Davidson--Murfreesboro--Franklin, TN	12	0.8%
Augusta-Richmond County, GA-SC	11	0.8%
Miami-Fort Lauderdale-West Palm Beach, FL	11	0.8%
Omaha-Council Bluffs, NE-IA	11	0.8%
Raleigh, NC	11	0.8%
Akron, OH	10	0.7%
Denver-Aurora-Lakewood, CO	10	0.7%
Kansas City, MO-KS	10	0.7%
Providence-Warwick, RI-MA	10	0.7%
Richmond, VA	10	0.7%
Birmingham-Hoover, AL	9	0.6%
Columbia, SC	9	0.6%
Houston-The Woodlands-Sugar Land, TX	9	0.6%
Huntington-Ashland, WV-KY-OH	9	0.6%
Knoxville, TN	9	0.6%
Lexington-Fayette, KY	9	0.6%
Orlando-Kissimmee-Sanford, FL	9	0.6%
Rochester, NY	9	0.6%
San Francisco-Oakland-Hayward, CA	9	0.6%
Toledo, OH	9	0.6%

MSA	Count	Percent
Canton-Massillon, OH	8	0.5%
Kingsport-Bristol-Bristol, TN-VA	8	0.5%
New Orleans-Metairie, LA	8	0.5%
Phoenix-Mesa-Scottsdale, AZ	8	0.5%
Spartanburg, SC	8	0.5%
Winston-Salem, NC	8	0.5%
Austin-Round Rock, TX	7	0.5%
Greenville-Anderson-Mauldin, SC	7	0.5%
Milwaukee-Waukesha-West Allis, WI	7	0.5%
Virginia Beach-Norfolk-Newport News, VA-NC	7	0.5%
Worcester, MA-CT	7	0.5%
Dayton, OH	6	0.4%
Fort Wayne, IN	6	0.4%
Jacksonville, FL	6	0.4%
Myrtle Beach-Conway-North Myrtle Beach, SC-NC	6	0.4%
Roanoke, VA	6	0.4%
Sacramento--Roseville--Arden-Arcade, CA	6	0.4%
Salisbury, MD-DE	6	0.4%
Seattle-Tacoma-Bellevue, WA	6	0.4%
Syracuse, NY	6	0.4%
Wooster, OH	6	0.4%
Albany-Schenectady-Troy, NY	5	0.3%
Hartford-West Hartford-East Hartford, CT	5	0.3%
Hickory-Lenoir-Morganton, NC	5	0.3%
Madison, WI	5	0.3%
Rural North Carolina	5	0.3%
Salt Lake City, UT	5	0.3%
San Diego-Carlsbad, CA	5	0.3%
Tampa-St. Petersburg-Clearwater, FL	5	0.3%
York-Hanover, PA	5	0.3%
Allentown-Bethlehem-Easton, PA-NJ	4	0.3%
Baton Rouge, LA	4	0.3%
Charleston, WV	4	0.3%
Charlottesville, VA	4	0.3%
Deltona-Daytona Beach-Ormond Beach, FL	4	0.3%
Fayetteville-Springdale-Rogers, AR-MO	4	0.3%
Gulfport-Biloxi-Pascagoula, MS	4	0.3%
Harrisburg-Carlisle, PA	4	0.3%
Jackson, MS	4	0.3%
Lakeland-Winter Haven, FL	4	0.3%
Las Vegas-Henderson-Paradise, NV	4	0.3%
Lynchburg, VA	4	0.3%
Oklahoma City, OK	4	0.3%
Portland-Vancouver-Hillsboro, OR-WA	4	0.3%
Riverside-San Bernardino-Ontario, CA	4	0.3%

MSA	Count	Percent
Rural Georgia	4	0.3%
Rural Virginia	4	0.3%
San Antonio-New Braunfels, TX	4	0.3%
Savannah, GA	4	0.3%
Asheville, NC	3	0.2%
Athens-Clarke County, GA	3	0.2%
Barnstable Town, MA	3	0.2%
Binghamton, NY	3	0.2%
Bridgeport-Stamford-Norwalk, CT	3	0.2%
Chattanooga, TN-GA	3	0.2%
Davenport-Moline-Rock Island, IA-IL	3	0.2%
Des Moines-West Des Moines, IA	3	0.2%
Durham-Chapel Hill, NC	3	0.2%
Evansville, IN-KY	3	0.2%
Fort Collins, CO	3	0.2%
Gainesville, GA	3	0.2%
Grand Rapids-Wyoming, MI	3	0.2%
Greensboro-High Point, NC	3	0.2%
Greenwood, SC	3	0.2%
Holland, MI	3	0.2%
Mansfield, OH	3	0.2%
Memphis, TN-MS-AR	3	0.2%
Muskegon, MI	3	0.2%
New Haven-Milford, CT	3	0.2%
Niles-Benton Harbor, MI	3	0.2%
Panama City, FL	3	0.2%
Reading, PA	3	0.2%
Rural Alabama	3	0.2%
Rural Kentucky	3	0.2%
Rural Wisconsin	3	0.2%
Saginaw, MI	3	0.2%
Scranton--Wilkes-Barre--Hazleton, PA	3	0.2%
Sevierville, TN	3	0.2%
Alexandria, LA	2	0.1%
Appleton, WI	2	0.1%
Bay City, MI	2	0.1%
Bismarck, ND	2	0.1%
Chambersburg-Waynesboro, PA	2	0.1%
Charleston-North Charleston, SC	2	0.1%
Crestview-Fort Walton Beach-Destin, FL	2	0.1%
East Stroudsburg, PA	2	0.1%
Flagstaff, AZ	2	0.1%
Flint, MI	2	0.1%
Fresno, CA	2	0.1%
Hagerstown-Martinsburg, MD-WV	2	0.1%

MSA	Count	Percent
Huntsville, AL	2	0.1%
Jackson, TN	2	0.1%
Jefferson, GA	2	0.1%
Kalamazoo-Portage, MI	2	0.1%
Lancaster, PA	2	0.1%
Lebanon, PA	2	0.1%
London, KY	2	0.1%
Lufkin, TX	2	0.1%
Macon, GA	2	0.1%
Madison, IN	2	0.1%
Marion, OH	2	0.1%
Meridian, MS	2	0.1%
Morgantown, WV	2	0.1%
Morristown, TN	2	0.1%
Naples-Immokalee-Marco Island, FL	2	0.1%
Newport, TN	2	0.1%
Norwich-New London, CT	2	0.1%
Ocean City, NJ	2	0.1%
Olean, NY	2	0.1%
Oshkosh-Neenah, WI	2	0.1%
Ottawa-Peru, IL	2	0.1%
Palm Bay-Melbourne-Titusville, FL	2	0.1%
Pinehurst-Southern Pines, NC	2	0.1%
Portsmouth, OH	2	0.1%
Rapid City, SD	2	0.1%
Rural California	2	0.1%
Rural Florida	2	0.1%
Rural Illinois	2	0.1%
Rural Indiana	2	0.1%
Rural Maine	2	0.1%
Rural Maryland	2	0.1%
Rural Nebraska	2	0.1%
Rural South Carolina	2	0.1%
Rural Texas	2	0.1%
Salem, OH	2	0.1%
San Jose-Sunnyvale-Santa Clara, CA	2	0.1%
San Luis Obispo-Paso Robles-Arroyo Grande, CA	2	0.1%
Seneca, SC	2	0.1%
Shelby, NC	2	0.1%
Somerset, PA	2	0.1%
Springfield, IL	2	0.1%
Springfield, MO	2	0.1%
State College, PA	2	0.1%
Terre Haute, IN	2	0.1%
Tiffin, OH	2	0.1%

MSA	Count	Percent
Topeka, KS	2	0.1%
Torrington, CT	2	0.1%
Trenton, NJ	2	0.1%
Tullahoma-Manchester, TN	2	0.1%
Tulsa, OK	2	0.1%
Urbana, OH	2	0.1%
Utica-Rome, NY	2	0.1%
Wapakoneta, OH	2	0.1%
Warsaw, IN	2	0.1%
Wheeling, WV-OH	2	0.1%
Whitewater-Elkhorn, WI	2	0.1%
Alamogordo, NM	1	0.1%
Albany, GA	1	0.1%
Angola, IN	1	0.1%
Ann Arbor, MI	1	0.1%
APO	1	0.1%
Ashtabula, OH	1	0.1%
Athens, OH	1	0.1%
Athens, TN	1	0.1%
Atlantic City-Hammonton, NJ	1	0.1%
Austin, MN	1	0.1%
Bainbridge, GA	1	0.1%
Bardstown, KY	1	0.1%
Bellingham, WA	1	0.1%
Billings, MT	1	0.1%
Blacksburg-Christiansburg-Radford, VA	1	0.1%
Bloomington, IL	1	0.1%
Bloomington, IN	1	0.1%
Boise City, ID	1	0.1%
Bowling Green, KY	1	0.1%
Bradford, PA	1	0.1%
Branson, MO	1	0.1%
Brevard, NC	1	0.1%
Burlington-South Burlington, VT	1	0.1%
Cape Coral-Fort Myers, FL	1	0.1%
Carbondale-Marion, IL	1	0.1%
Champaign-Urbana, IL	1	0.1%
Chico, CA	1	0.1%
Clarksburg, WV	1	0.1%
Cleveland, TN	1	0.1%
College Station-Bryan, TX	1	0.1%
Colorado Springs, CO	1	0.1%
Columbus, GA-AL	1	0.1%
Concord, NH	1	0.1%
Corning, NY	1	0.1%

MSA	Count	Percent
Corpus Christi, TX	1	0.1%
Cumberland, MD-WV	1	0.1%
Dalton, GA	1	0.1%
Danville, KY	1	0.1%
Decatur, IL	1	0.1%
Dover, DE	1	0.1%
Dubuque, IA	1	0.1%
Duluth, MN-WI	1	0.1%
Dyersburg, TN	1	0.1%
Eau Claire, WI	1	0.1%
Erie, PA	1	0.1%
Eureka-Arcata-Fortuna, CA	1	0.1%
Fargo, ND-MN	1	0.1%
Fayetteville, NC	1	0.1%
Findlay, OH	1	0.1%
Forest City, NC	1	0.1%
Forrest City, AR	1	0.1%
Gadsden, AL	1	0.1%
Gardnerville Ranchos, NV	1	0.1%
Glens Falls, NY	1	0.1%
Greeley, CO	1	0.1%
Green Bay, WI	1	0.1%
Harrison, AR	1	0.1%
Hillsdale, MI	1	0.1%
Homosassa Springs, FL	1	0.1%
Houma-Thibodaux, LA	1	0.1%
Hudson, NY	1	0.1%
Huntington, IN	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%
Jamestown, ND	1	0.1%
Jefferson City, MO	1	0.1%
Johnson City, TN	1	0.1%
Juneau, AK	1	0.1%
Kalispell, MT	1	0.1%
Kankakee, IL	1	0.1%
Kapaa, HI	1	0.1%
Kennewick-Richland, WA	1	0.1%
Kerrville, TX	1	0.1%
Kill Devil Hills, NC	1	0.1%
Killeen-Temple, TX	1	0.1%
Kingsville, TX	1	0.1%

MSA	Count	Percent
Kokomo, IN	1	0.1%
La Crosse-Onalaska, WI-MN	1	0.1%
La Grande, OR	1	0.1%
Laconia, NH	1	0.1%
Lafayette-West Lafayette, IN	1	0.1%
Lafayette, LA	1	0.1%
LaGrange, GA	1	0.1%
Lake Charles, LA	1	0.1%
Lake City, FL	1	0.1%
Lake Havasu City-Kingman, AZ	1	0.1%
Lansing-East Lansing, MI	1	0.1%
Las Cruces, NM	1	0.1%
Las Vegas, NM	1	0.1%
Laurel, MS	1	0.1%
Lawton, OK	1	0.1%
Lewistown, PA	1	0.1%
Lima, OH	1	0.1%
Madisonville, KY	1	0.1%
Manchester-Nashua, NH	1	0.1%
Manitowoc, WI	1	0.1%
Marietta, OH	1	0.1%
Marion, IN	1	0.1%
Marion, NC	1	0.1%
Marquette, MI	1	0.1%
McAllen-Edinburg-Mission, TX	1	0.1%
Menomonie, WI	1	0.1%
Midland, TX	1	0.1%
Milledgeville, GA	1	0.1%
Minot, ND	1	0.1%
Modesto, CA	1	0.1%
Monroe, LA	1	0.1%
Morgan City, LA	1	0.1%
Muncie, IN	1	0.1%
Murray, KY	1	0.1%
Muskogee, OK	1	0.1%
Natchez, MS-LA	1	0.1%
New Bern, NC	1	0.1%
New Castle, IN	1	0.1%
New Castle, PA	1	0.1%
New Philadelphia-Dover, OH	1	0.1%
New Ulm, MN	1	0.1%
Newberry, SC	1	0.1%
North Port-Sarasota-Bradenton, FL	1	0.1%
North Wilkesboro, NC	1	0.1%
Ocala, FL	1	0.1%

MSA	Count	Percent
Ogden-Clearfield, UT	1	0.1%
Ogdensburg-Massena, NY	1	0.1%
Orangeburg, SC	1	0.1%
Oskaloosa, IA	1	0.1%
Ottumwa, IA	1	0.1%
Oxnard-Thousand Oaks-Ventura, CA	1	0.1%
Palatka, FL	1	0.1%
Paragould, AR	1	0.1%
Pittsfield, MA	1	0.1%
Plymouth, IN	1	0.1%
Pontiac, IL	1	0.1%
Port Clinton, OH	1	0.1%
Port St. Lucie, FL	1	0.1%
Portland-South Portland, ME	1	0.1%
Pottsville, PA	1	0.1%
Raymondville, TX	1	0.1%
Richmond-Berea, KY	1	0.1%
Rochester, MN	1	0.1%
Rockford, IL	1	0.1%
Rocky Mount, NC	1	0.1%
Rome, GA	1	0.1%
Rural Arkansas	1	0.1%
Rural Michigan	1	0.1%
Rural Minnesota	1	0.1%
Rural New Mexico	1	0.1%
Rural North Dakota	1	0.1%
Rural Ohio	1	0.1%
Rural Oregon	1	0.1%
Rural Vermont	1	0.1%
Rutland, VT	1	0.1%
Salem, OR	1	0.1%
Sandpoint, ID	1	0.1%
Sandusky, OH	1	0.1%
Santa Fe, NM	1	0.1%
Scottsboro, AL	1	0.1%
Seneca Falls, NY	1	0.1%
Shreveport-Bossier City, LA	1	0.1%
South Bend-Mishawaka, IN-MI	1	0.1%
Spokane-Spokane Valley, WA	1	0.1%
Springfield, MA	1	0.1%
Springfield, OH	1	0.1%
St. Cloud, MN	1	0.1%
St. Joseph, MO-KS	1	0.1%
St. Marys, GA	1	0.1%
Statesboro, GA	1	0.1%

MSA	Count	Percent
Staunton-Waynesboro, VA	1	0.1%
Summerville, GA	1	0.1%
Sumter, SC	1	0.1%
Sunbury, PA	1	0.1%
The Villages, FL	1	0.1%
Truckee-Grass Valley, CA	1	0.1%
Tucson, AZ	1	0.1%
Tuscaloosa, AL	1	0.1%
Valdosta, GA	1	0.1%
Vallejo-Fairfield, CA	1	0.1%
Vincennes, IN	1	0.1%
Wahpeton, ND-MN	1	0.1%
Washington Court House, OH	1	0.1%
Washington, NC	1	0.1%
Watertown-Fort Drum, NY	1	0.1%
Wausau, WI	1	0.1%
Waycross, GA	1	0.1%
Weirton-Steubenville, WV-OH	1	0.1%
Wichita, KS	1	0.1%
Williamsport, PA	1	0.1%
Wilmington, NC	1	0.1%
Wilmington, OH	1	0.1%
Worthington, MN	1	0.1%
Zanesville, OH	1	0.1%

COLLEGE of CHARLESTON

SCHOOL OF BUSINESS

OFFICE OF TOURISM ANALYSIS

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