

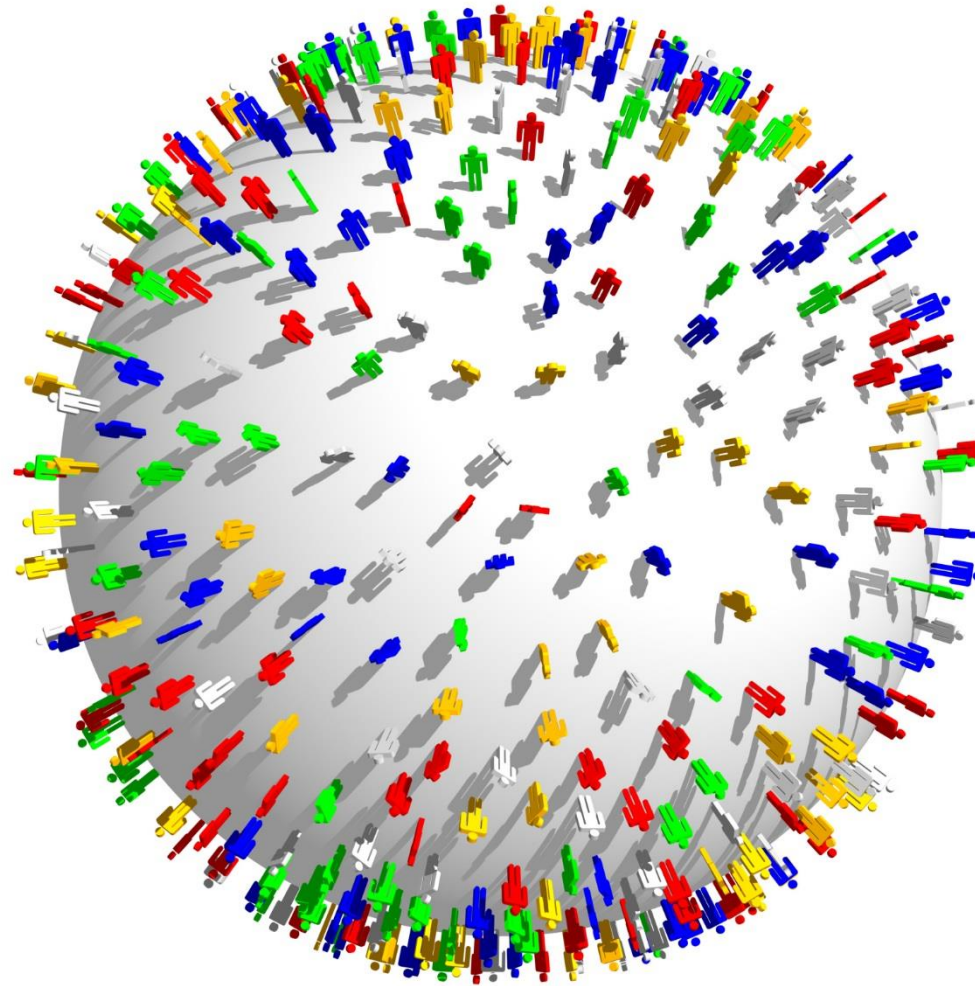


September 2013

Lowcountry and Resort Islands
Tourism Institute at
USC Beaufort

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Demographics



Top 24 DMA Markets
Percent Share of Frequencies minus
Arbitron, Nielsen, and Scarborough

Metropolitan Area	Sum of 54 by Metropolitan Area	% Share	% Share - Arbitron	% Share – Nielsen	% Share - Scarborough
New York-Northern New Jersey-Long Island, NY-NJ-PA MSA	5	7%	-25%	-21%	-14%
Houston-Sugar Land-Baytown, TX MSA	2	3%	-7%	-5%	-7%
Atlanta-Sandy Springs-Marietta, GA MSA	5	7%	-2%	-2%	-4%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	3	4%	-5%	-7%	-7%
Boston-Cambridge-Quincy, MA-NH MSA	2	3%	-5%	-5%	-7%
Detroit-Warren-Livonia, MI MSA	2	3%	-5%	-5%	-7%
Charlotte-Gastonia-Concord, NC-SC MSA	8	11%	7%	7%	7%
Cincinnati-Middletown, OH-KY-IN MSA	4	6%	2%	2%	1%
Columbus, OH MSA	2	3%	0%	-1%	-2%
Virginia Beach-Norfolk-Newport News, VA-NC MSA	3	4%	1%	2%	1%
Raleigh-Cary, NC MSA	2	3%	0%	-1%	-1%
Asheville, NC MSA	2	3%	1%	0%	1%
Columbia, SC MSA	4	6%	5%	4%	6%
Toledo, OH MSA	2	3%	2%	1%	1%
Lexington-Fayette, KY MSA	2	3%	2%	1%	0%
Myrtle Beach-Conway-North Myrtle Beach, SC MSA	2	3%	2%	2%	3%
Wilmington, NC MSA	5	7%	7%	6%	7%
Twin Falls, ID MSA	1	1%	1%	1%	1%
Lafayette, IN MSA	2	3%	3%	3%	3%
Allentown-Bethlehem-Easton, PA-NJ MSA	4	6%	6%	6%	6%
Hinesville-Fort Stewart, GA MSA	3	4%	4%	4%	4%
Palm Bay-Melbourne-Titusville, FL MSA	2	3%	3%	3%	3%
Akron, OH MSA	2	3%	3%	3%	3%
Hilo, HI MSA	1	1%	1%	1%	1%
Total	70	100%	0%	0%	0%

Top DMA Markets

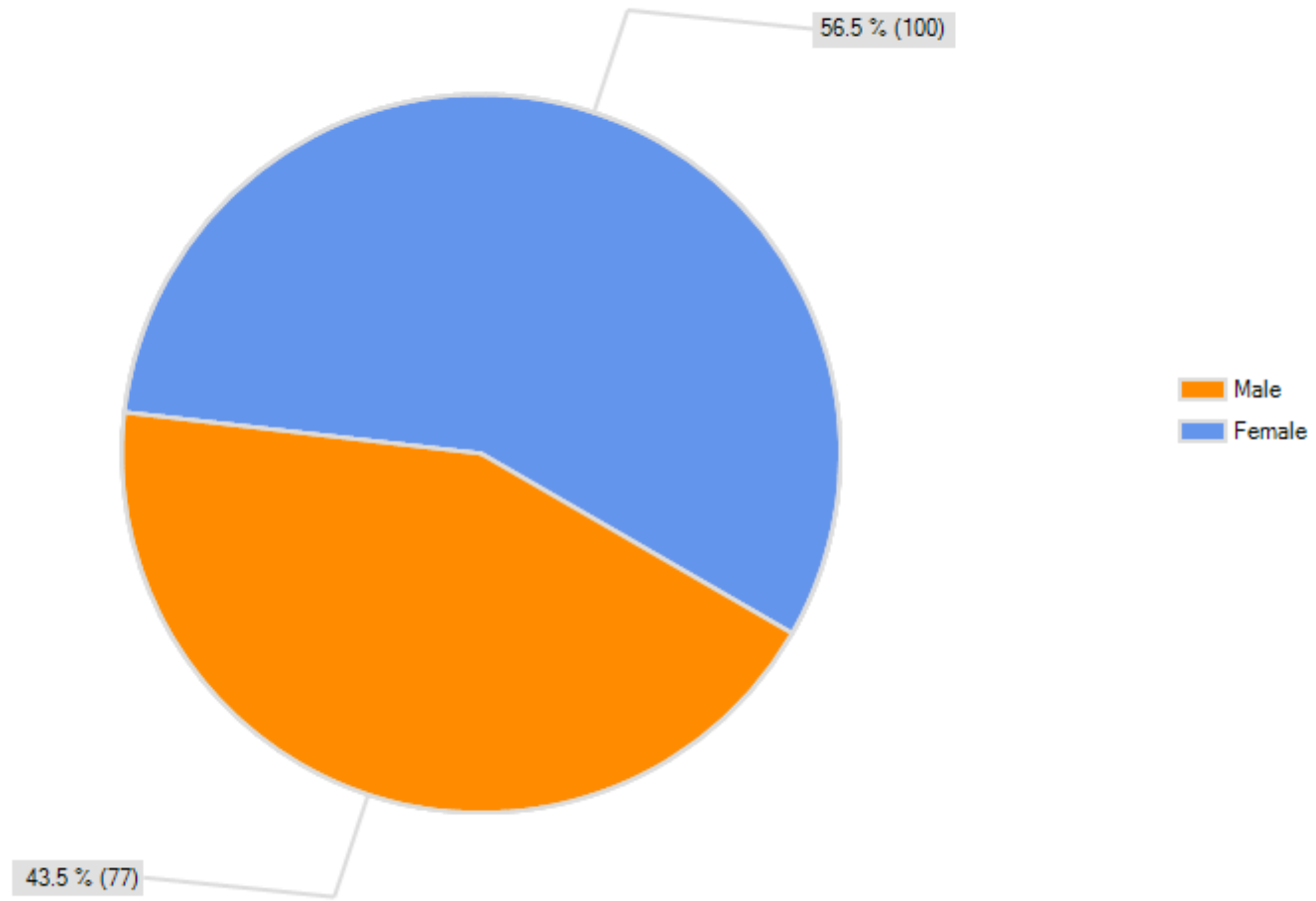
- The top markets for Burgers and Brew are New York, NY, Houston, TX, Atlanta, GA, Philadelphia, PA, Boston, MA, Detroit, MI, and Charlotte-Gastonia-Concord, NC.
- Middle markets include Cincinnati, OH, Columbus, OH, Virginia Beach, VA, Raleigh-Cary, NC, Asheville, NC, and Columbia, SC.
- The weaker markets include Toledo, OH, Lexington, KY, Myrtle Beach, SC, Wilmington, NC, Twin Falls, ID, and Lafayette, IN.
- This analysis does not include the zip codes for Hilton Head, SC and Savannah, GA.

Metropolitan Area	Sum of 54 by Metropolitan Area
Hilton Head Island-Beaufort, SC MSA	112
Charlotte-Gastonia-Concord, NC-SC MSA	8
Wilmington, NC MSA	5
Atlanta-Sandy Springs-Marietta, GA MSA	5
New York-Northern New Jersey-Long Island, NY-NJ-PA MSA	5
Columbia, SC MSA	4
Cincinnati-Middletown, OH-KY-IN MSA	4
Allentown-Bethlehem-Easton, PA-NJ MSA	4
Hinesville-Fort Stewart, GA MSA	3
Virginia Beach-Norfolk-Newport News, VA-NC MSA	3
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	3
Myrtle Beach-Conway-North Myrtle Beach, SC MSA	2
Houston-Sugar Land-Baytown, TX MSA	2
Savannah, GA MSA	2

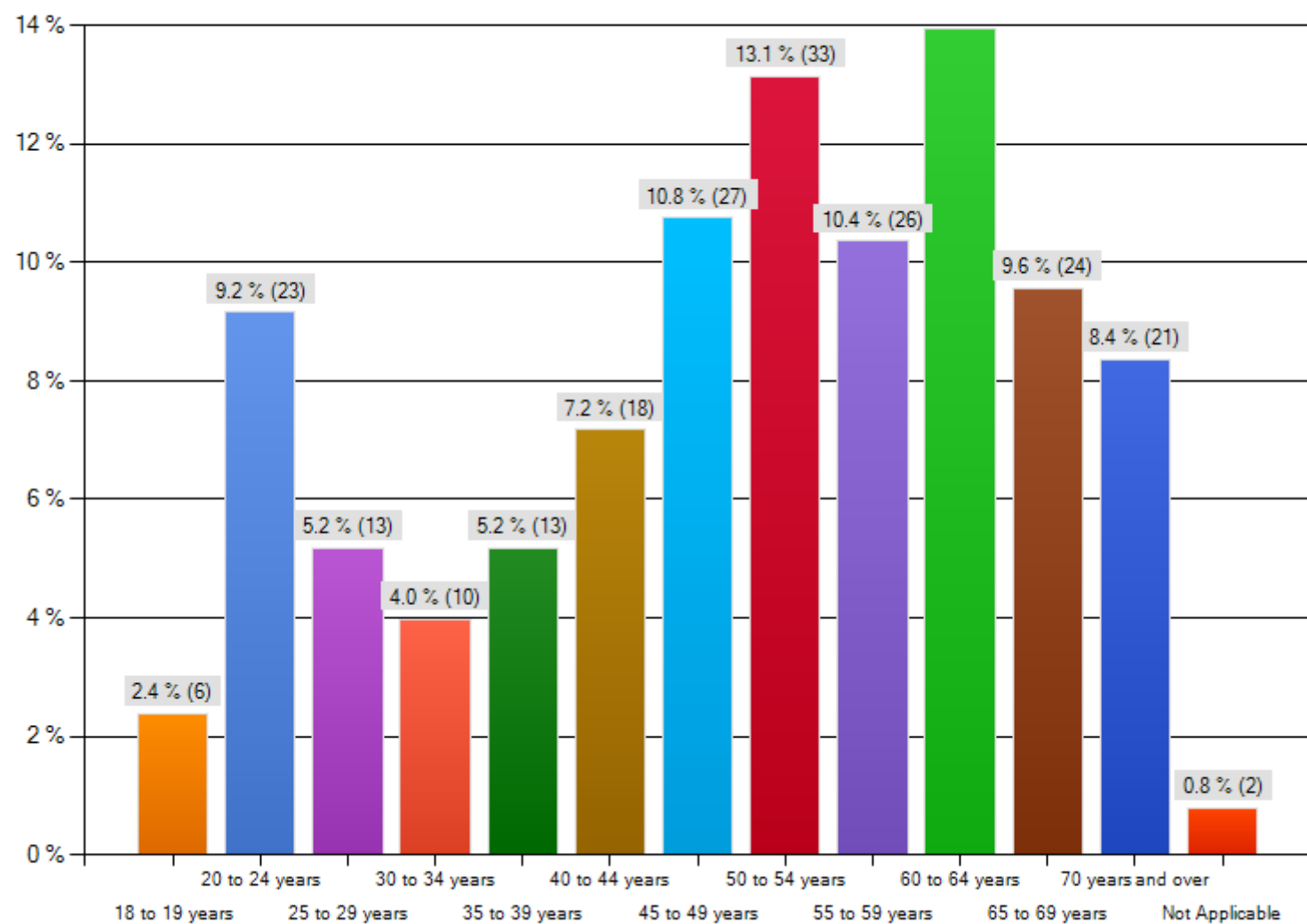
Metropolitan Area	Sum of 54 by Metropolitan Area
Palm Bay-Melbourne-Titusville, FL MSA	2
Lexington-Fayette, KY MSA	2
Lafayette, IN MSA	2
Asheville, NC MSA	2
Columbus, OH MSA	2
Toledo, OH MSA	2
Detroit-Warren-Livonia, MI MSA	2
Akron, OH MSA	2
Raleigh-Cary, NC MSA	2
Boston-Cambridge-Quincy, MA-NH MSA	2
Hilo, HI MSA	1
Twin Falls, ID MSA	1
Colorado Springs, CO MSA	1
Statesboro, GA MSA	1
Gainesville, FL MSA	1

Metropolitan Area	Sum of 54 by Metropolitan Area
Augusta-Richmond County, GA-SC MSA	1
Seattle-Tacoma-Bellevue, WA MSA	1
Panama City-Lynn Haven, FL MSA	1
Nashville-Davidson--Murfreesboro, TN MSA	1
Owensboro, KY MSA	1
Chicago-Naperville-Joliet, IL-IN-WI MSA	1
Whitewater, WI MSA	1
Milwaukee-Waukesha-West Allis, WI MSA	1
Southern Pines-Pinehurst, NC MSA	1
Winston-Salem, NC MSA	1
Athens-Clarke County, GA MSA	1
Baltimore-Towson, MD MSA	1
Scranton--Wilkes-Barre, PA MSA	1
	200

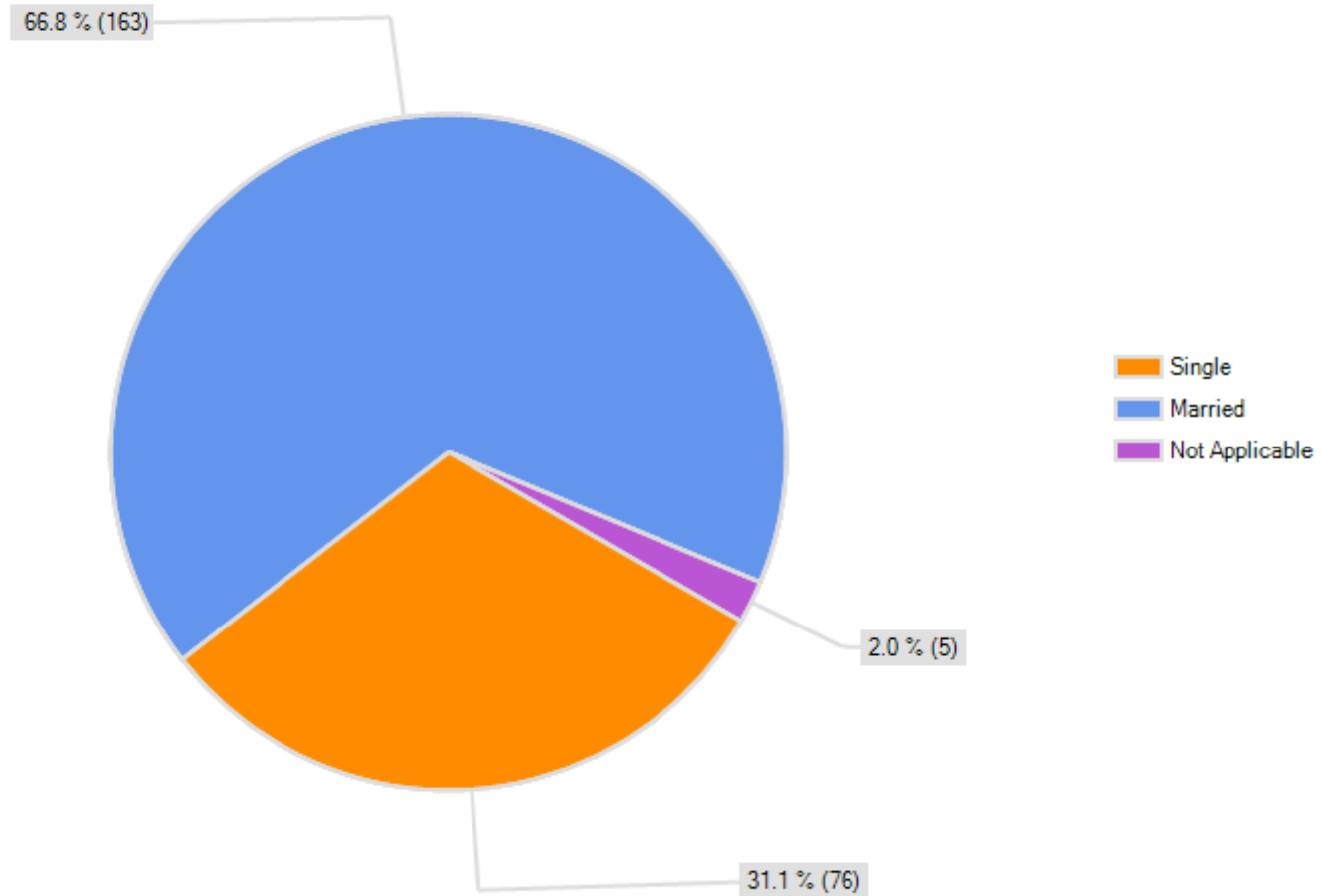
Please indicate your gender below.



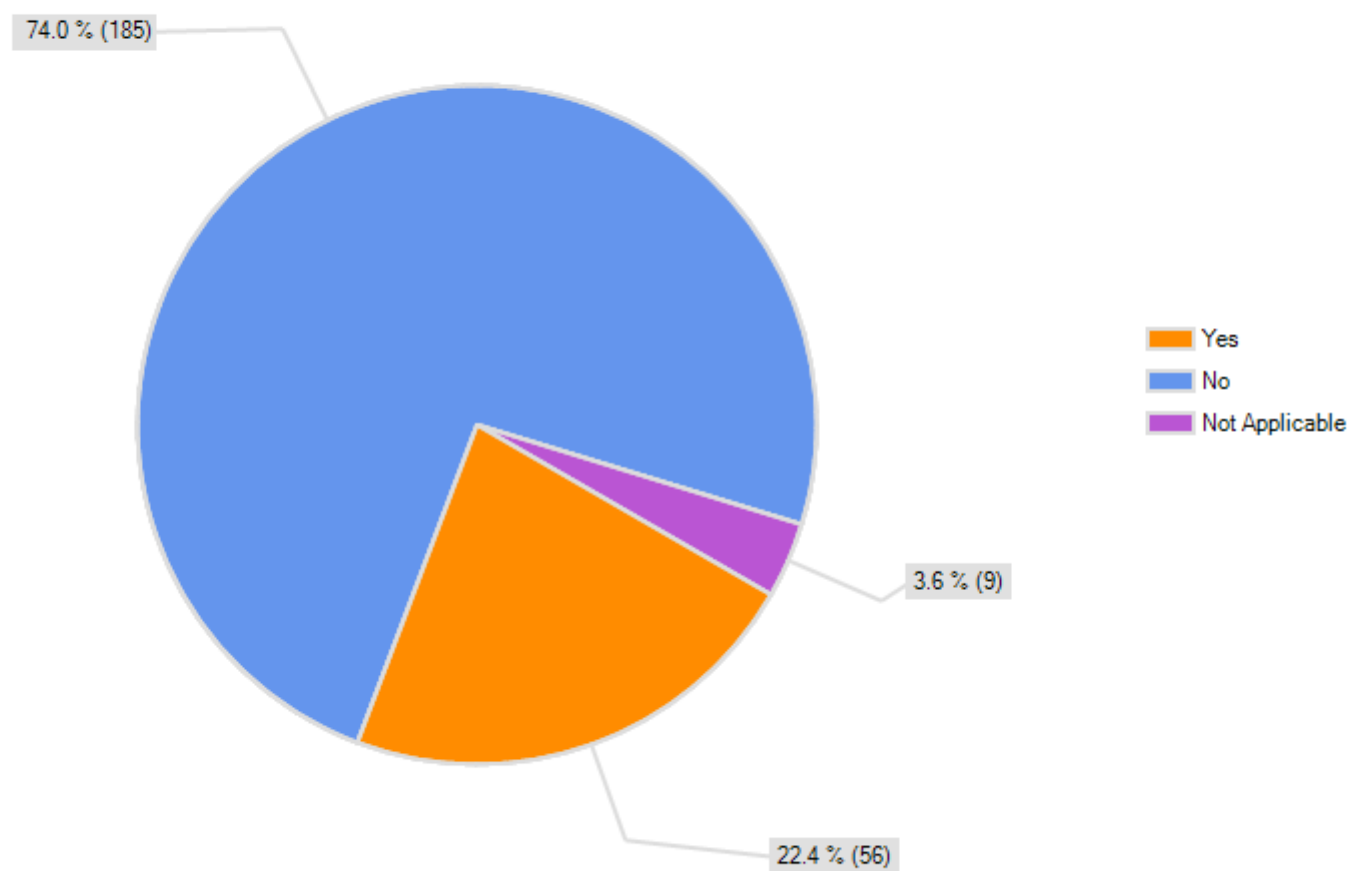
Please indicate your age below.



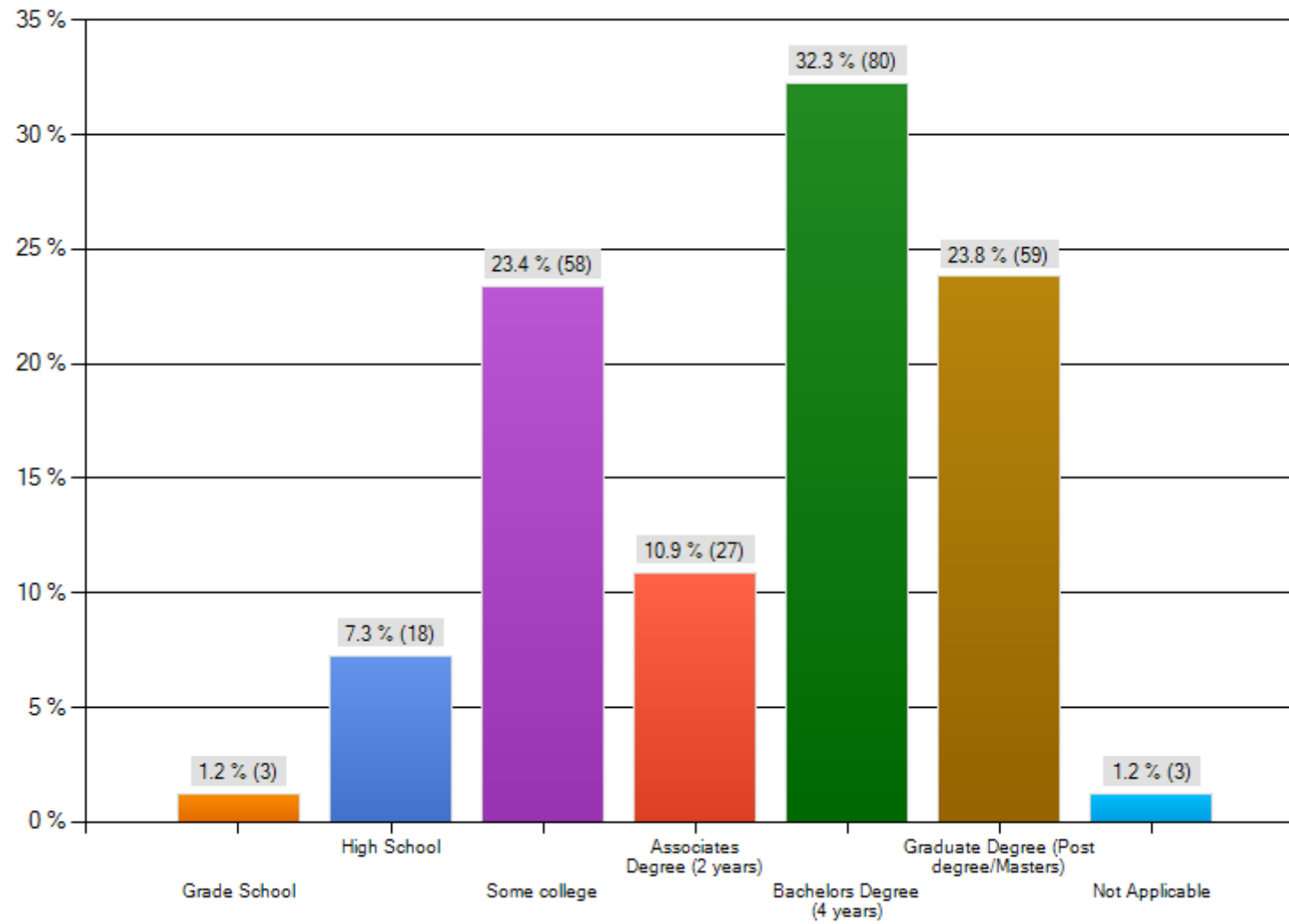
Please indicate your marital status.



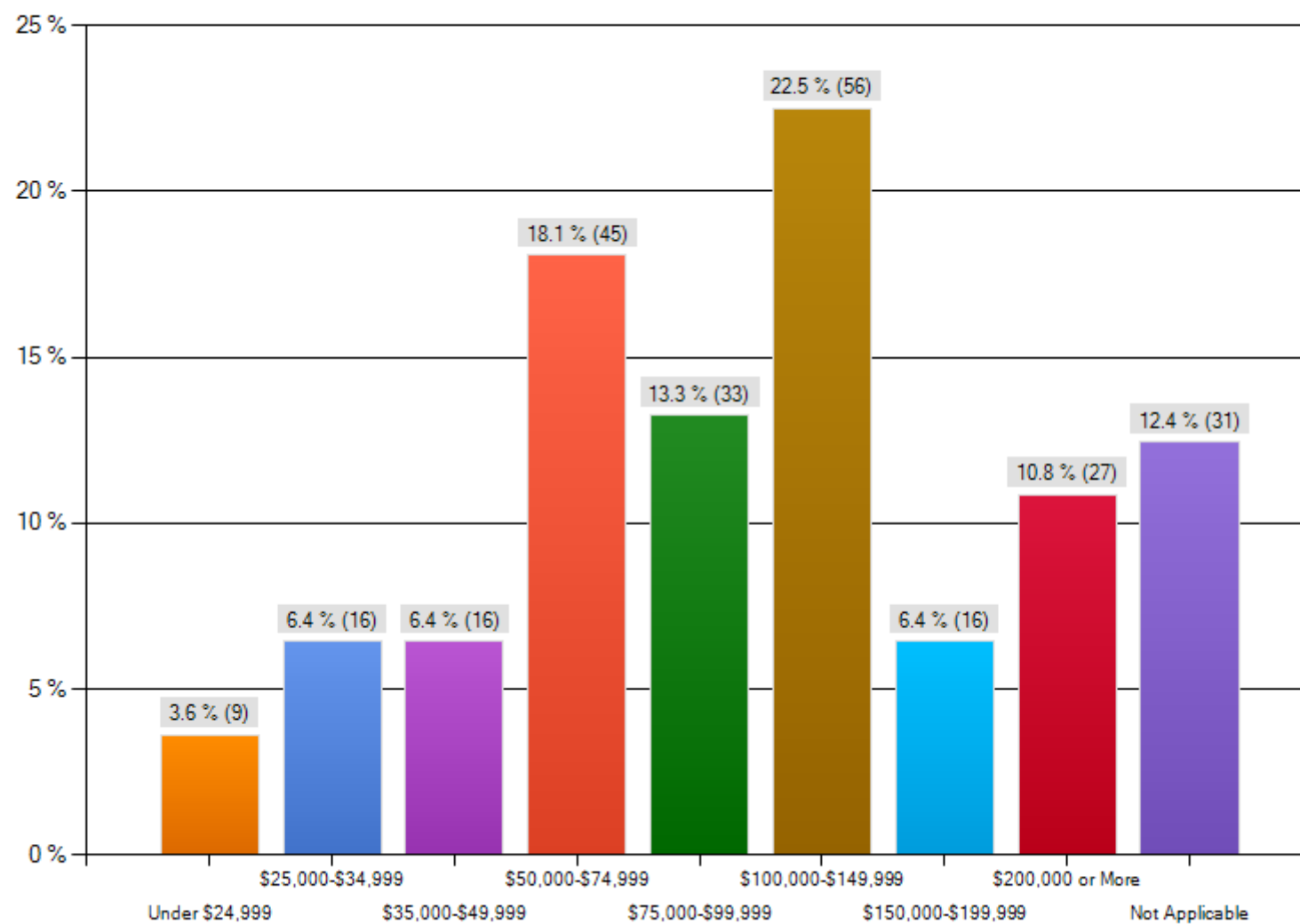
Do you have children under 18 living at home?



Please indicate your highest level of education.



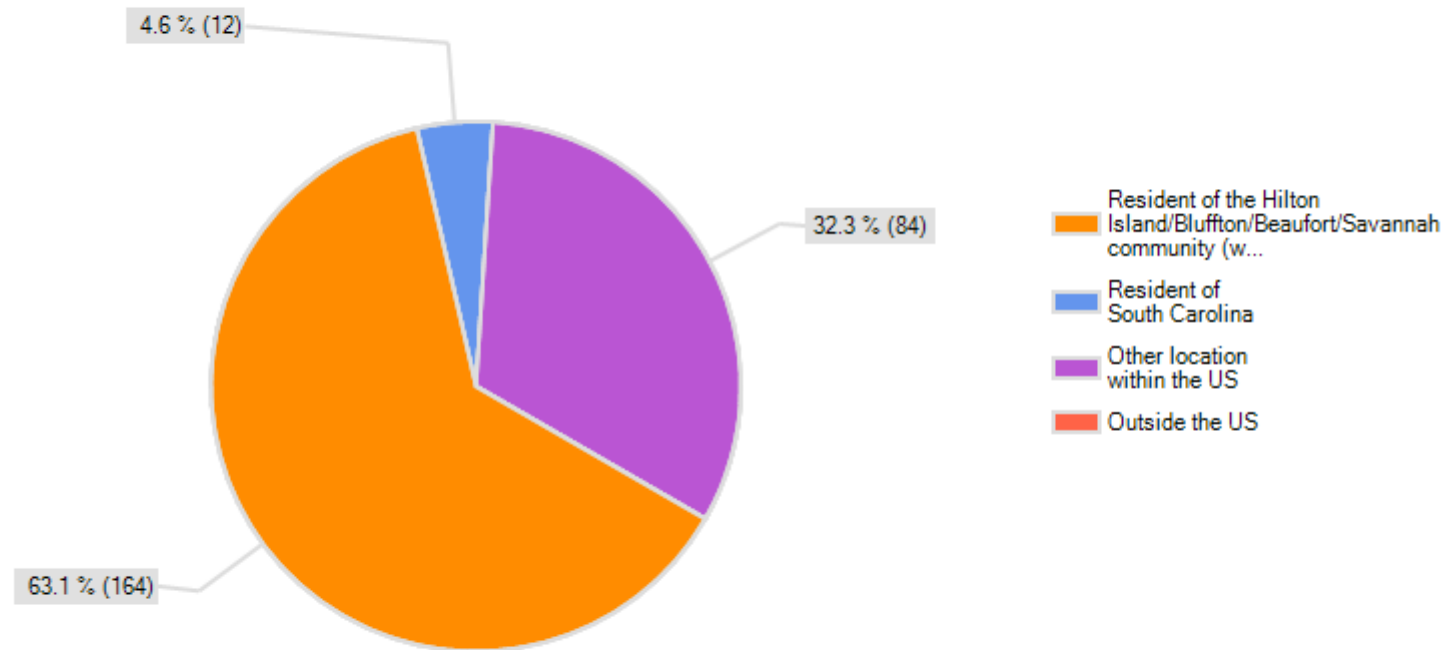
Which of the following ranges includes your annual household income?



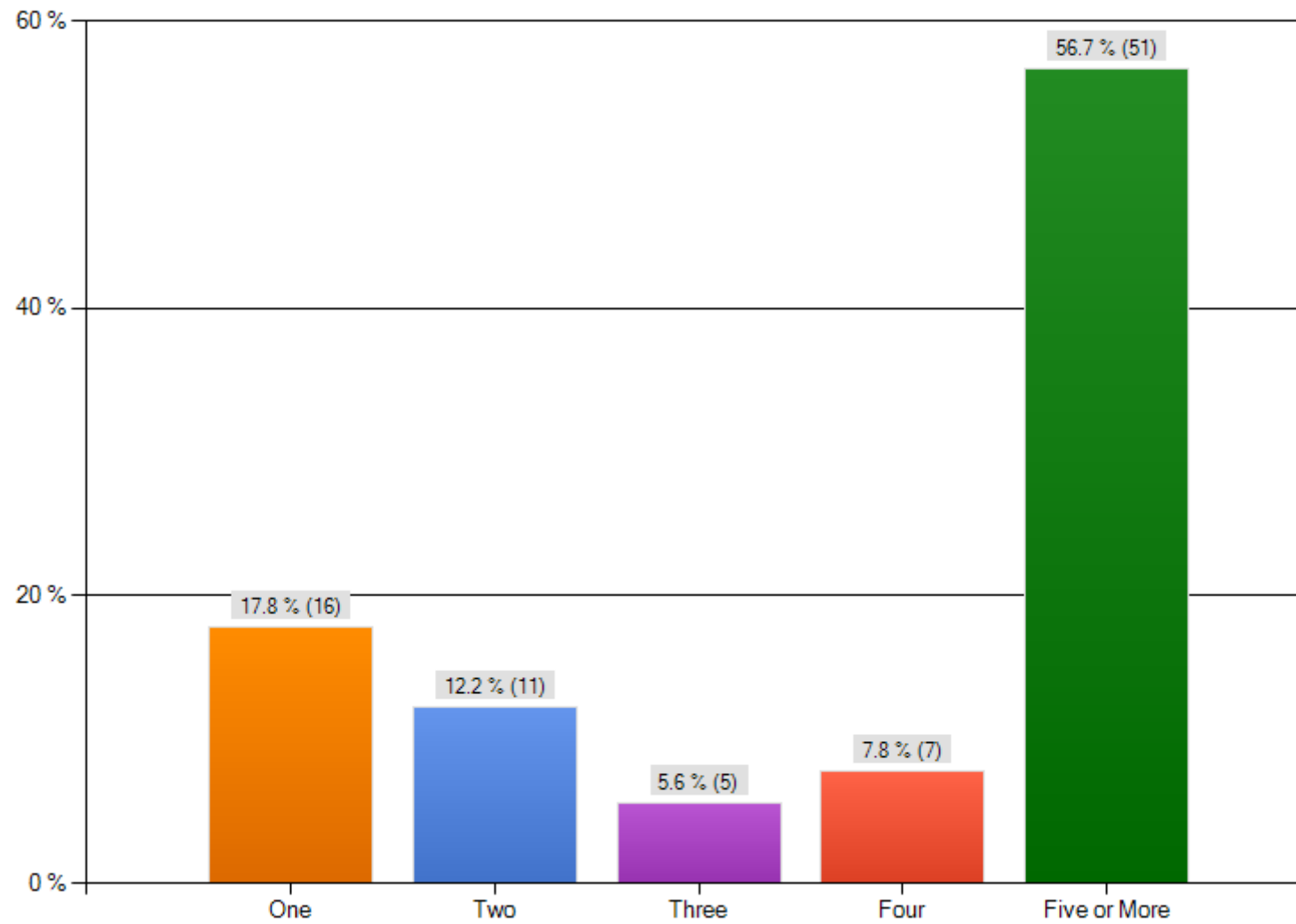
Visitor Characteristics



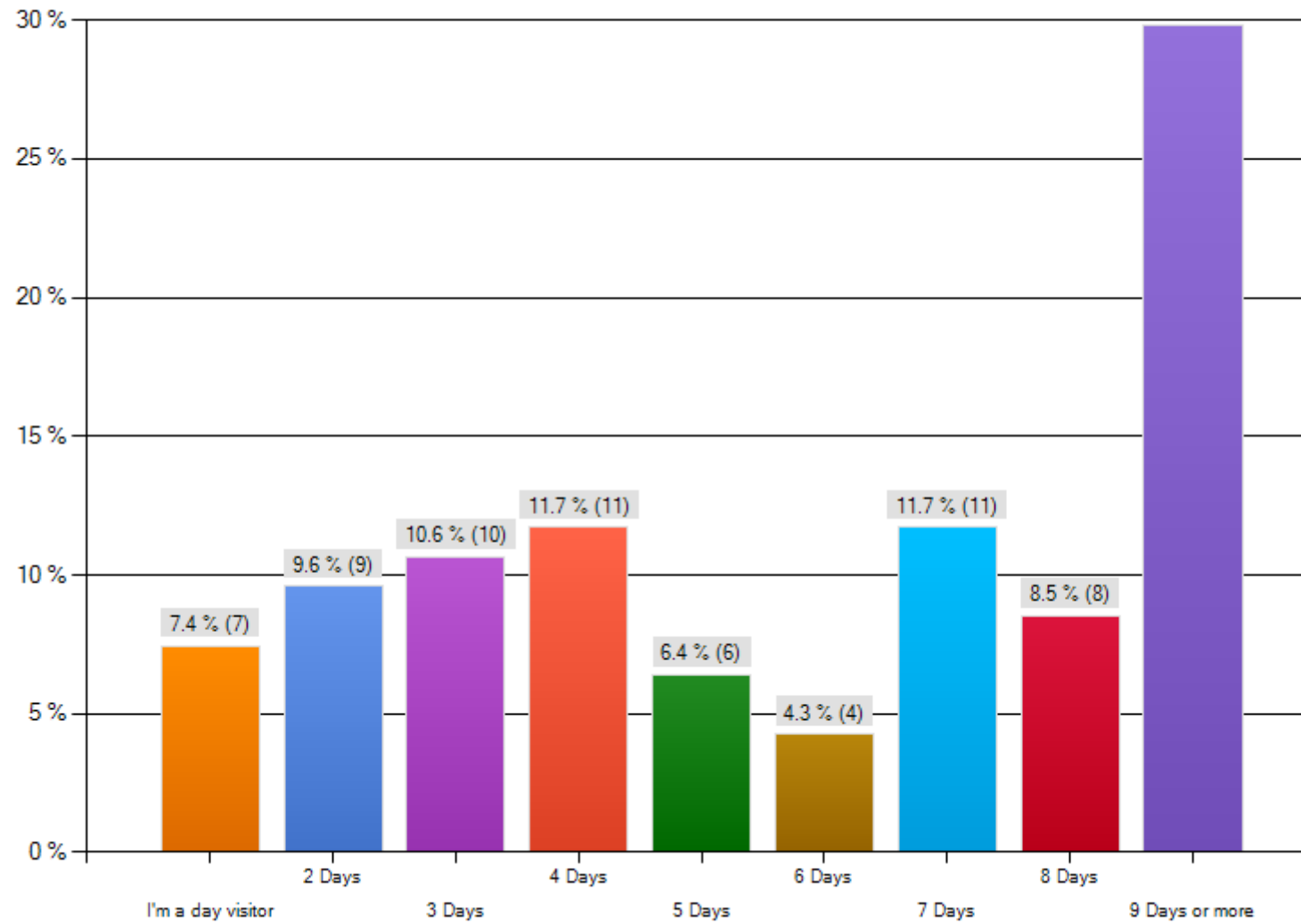
Where is your primary residence? (Please the button to the left of your answer, then touch the NEXT button below to advance the survey.)



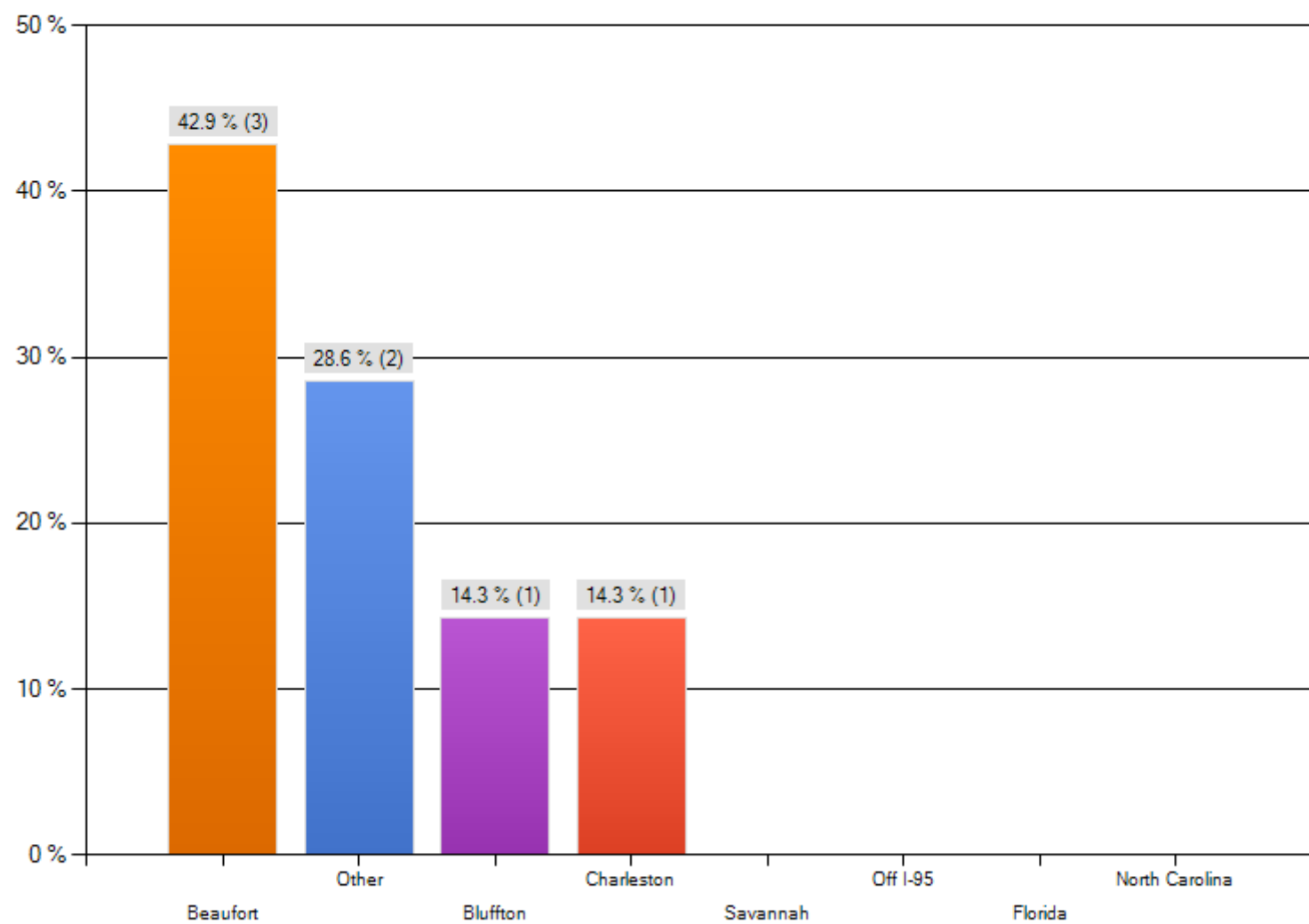
Counting this trip, HOW MANY trips had you taken to Hilton Head Island?



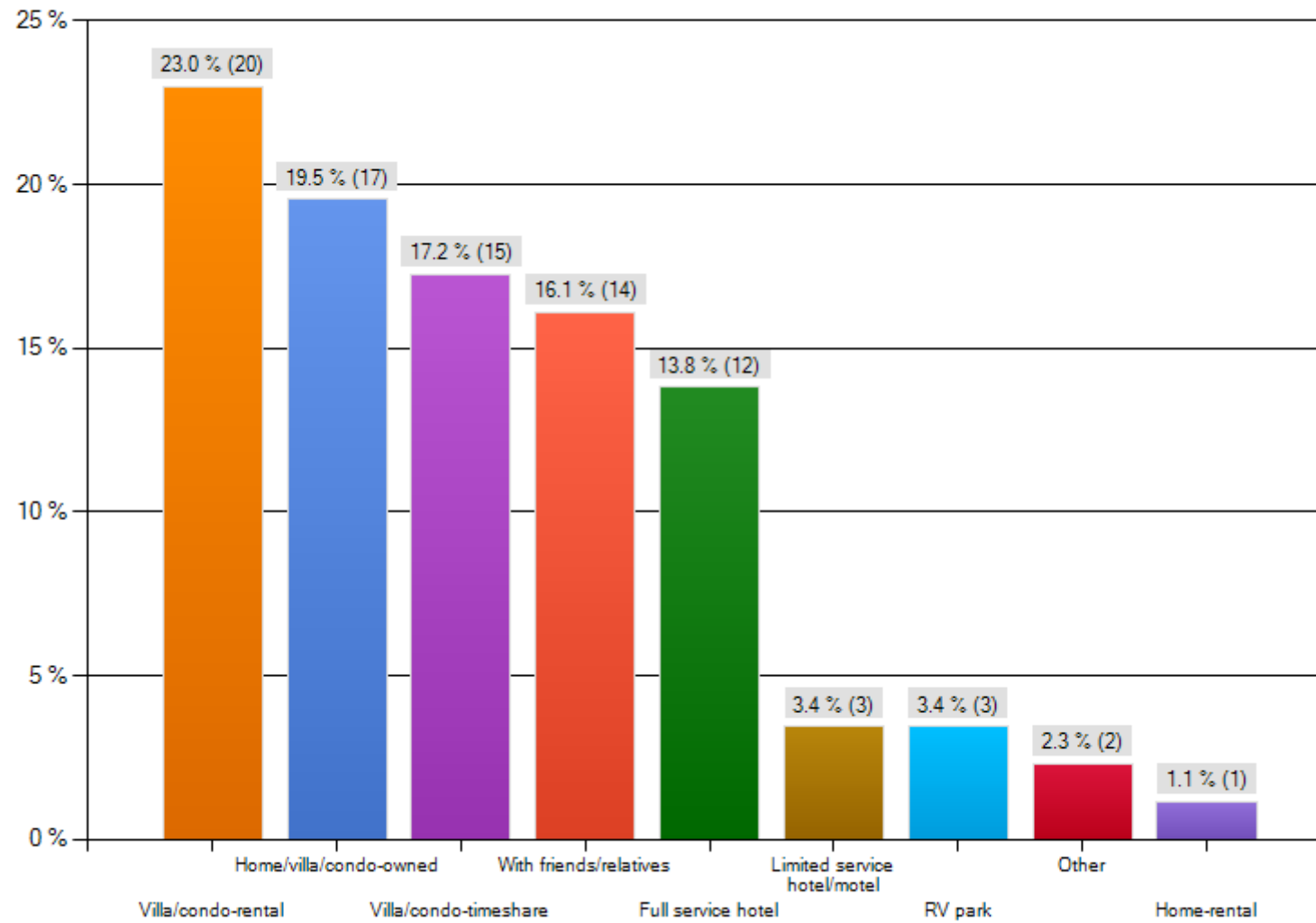
How many days do you intend to stay on Hilton Head Island?



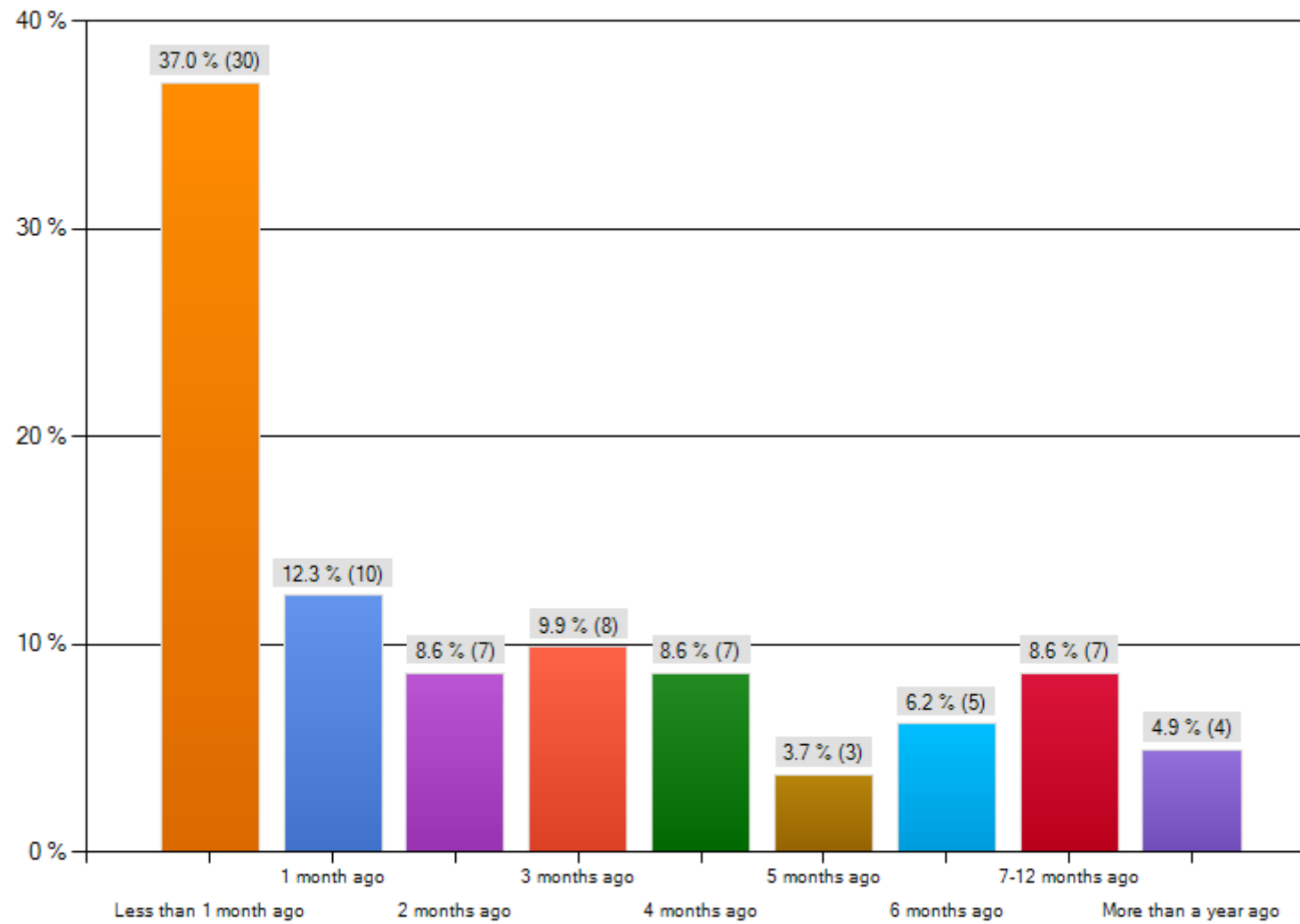
Where are you staying overnight on this trip?



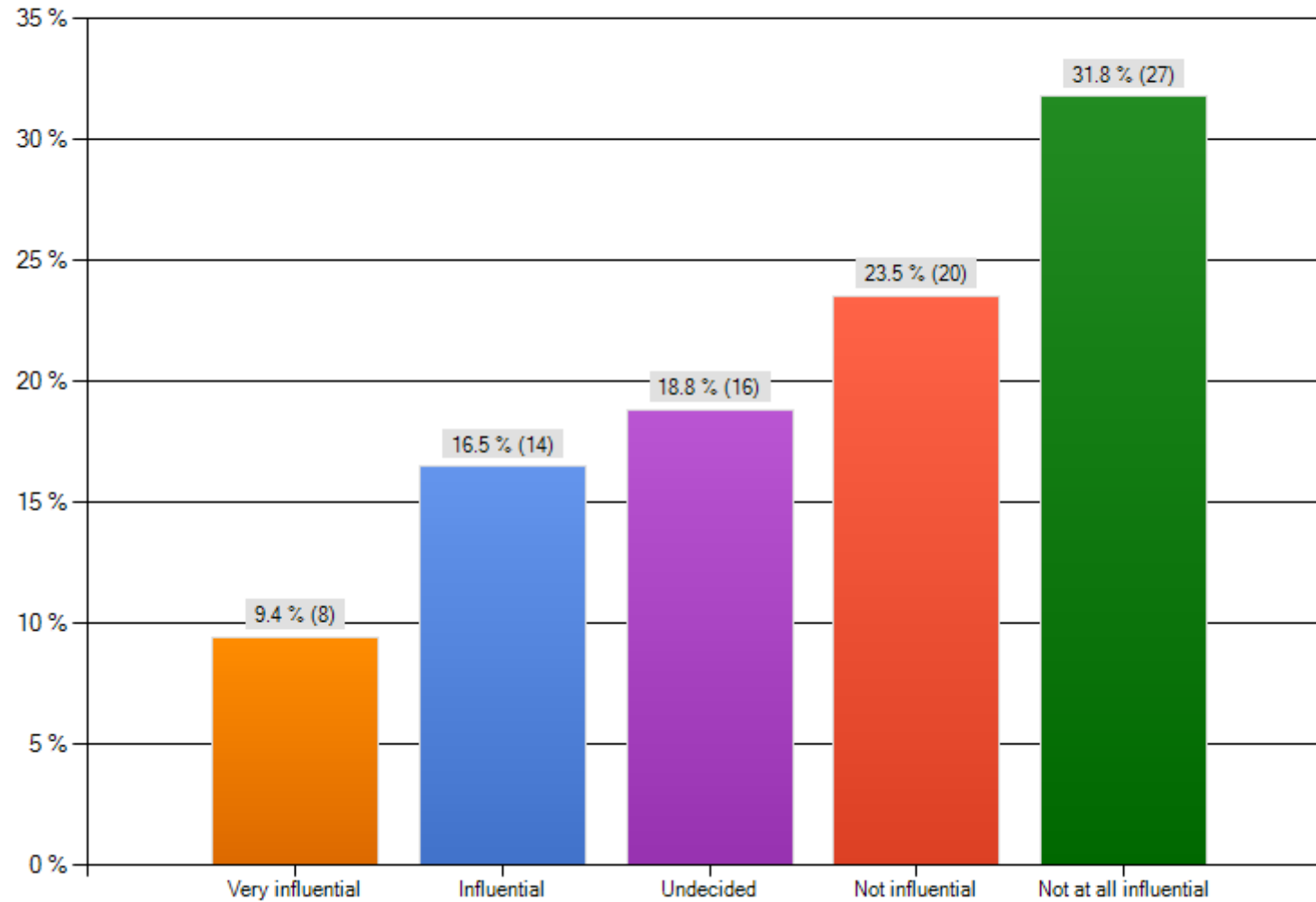
What type of accommodations will you be using while visiting Hilton Head Island?



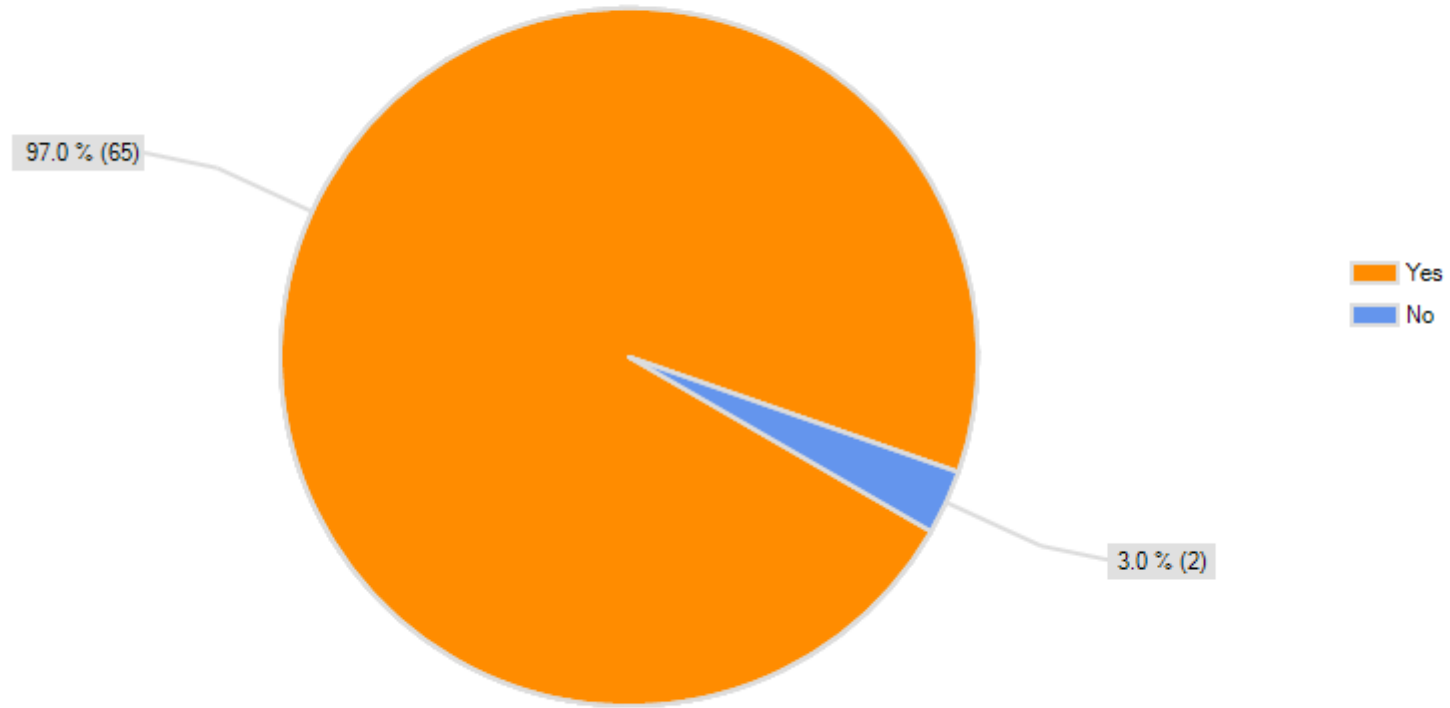
How many months in advance did you book this trip?



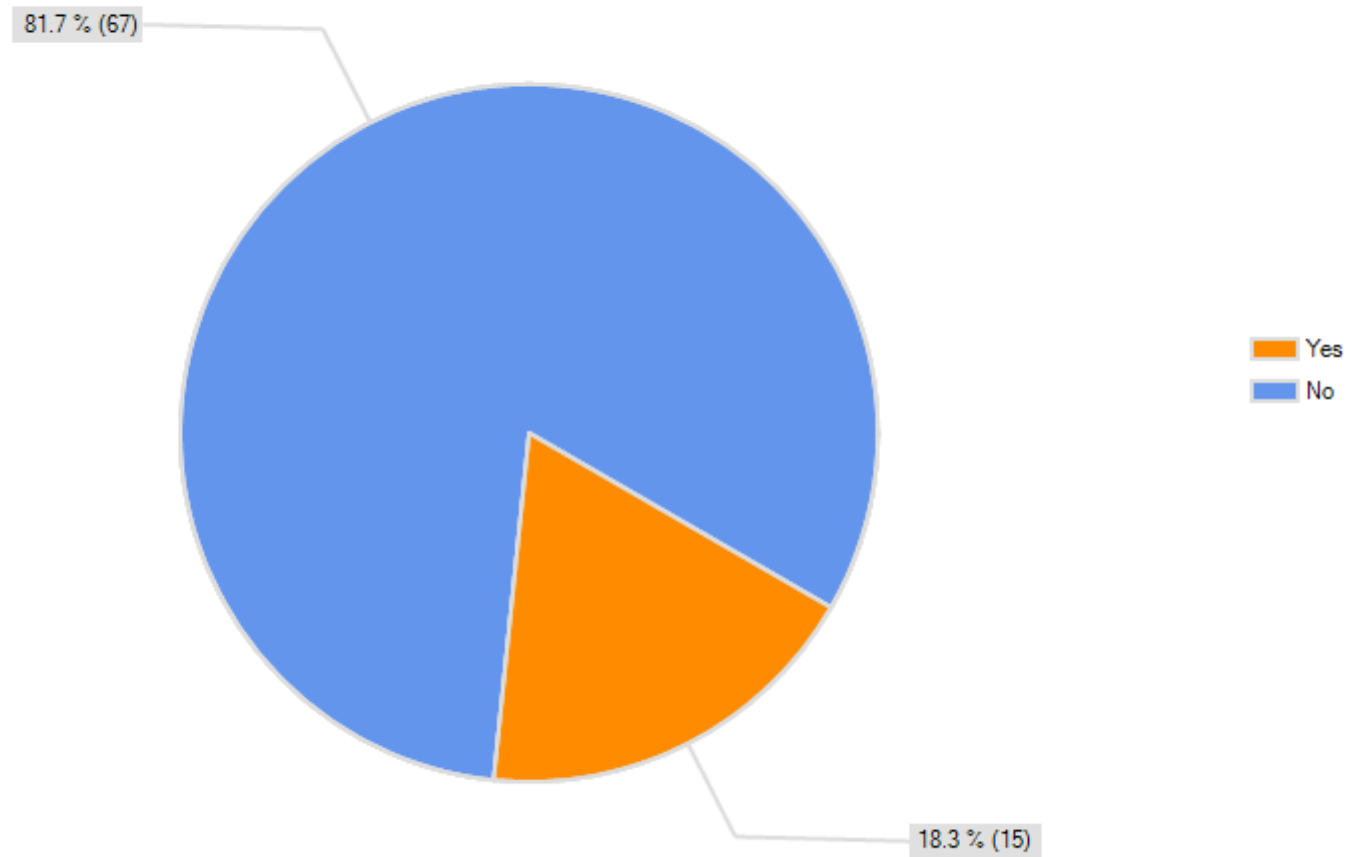
How influential was the 2013 Hilton Head Island Burgers and Brew Festival when initially planning your trip to Hilton Head Island?



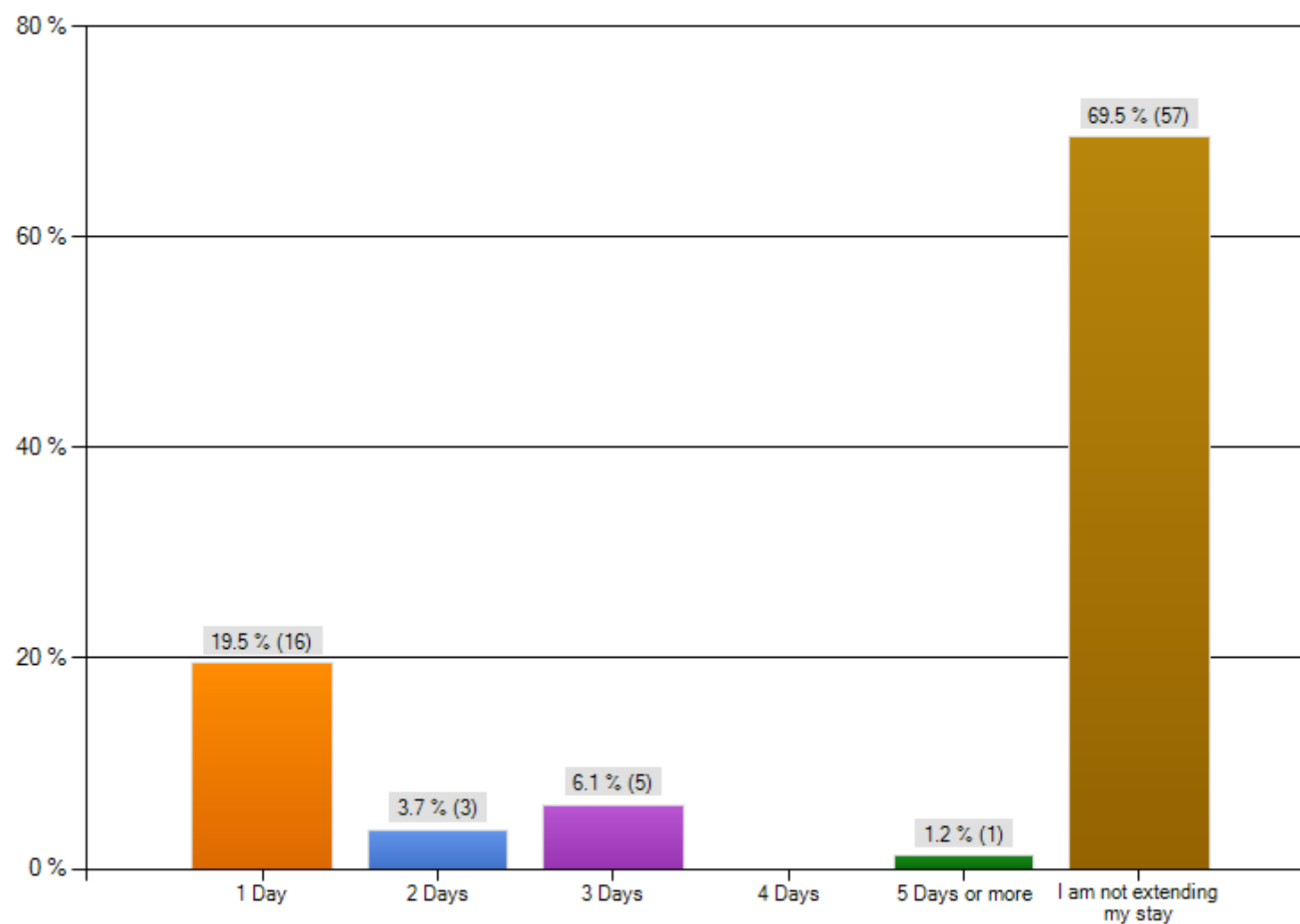
Would you have visited the Hilton Head Island area AT THIS TIME even if this festival had not been held?



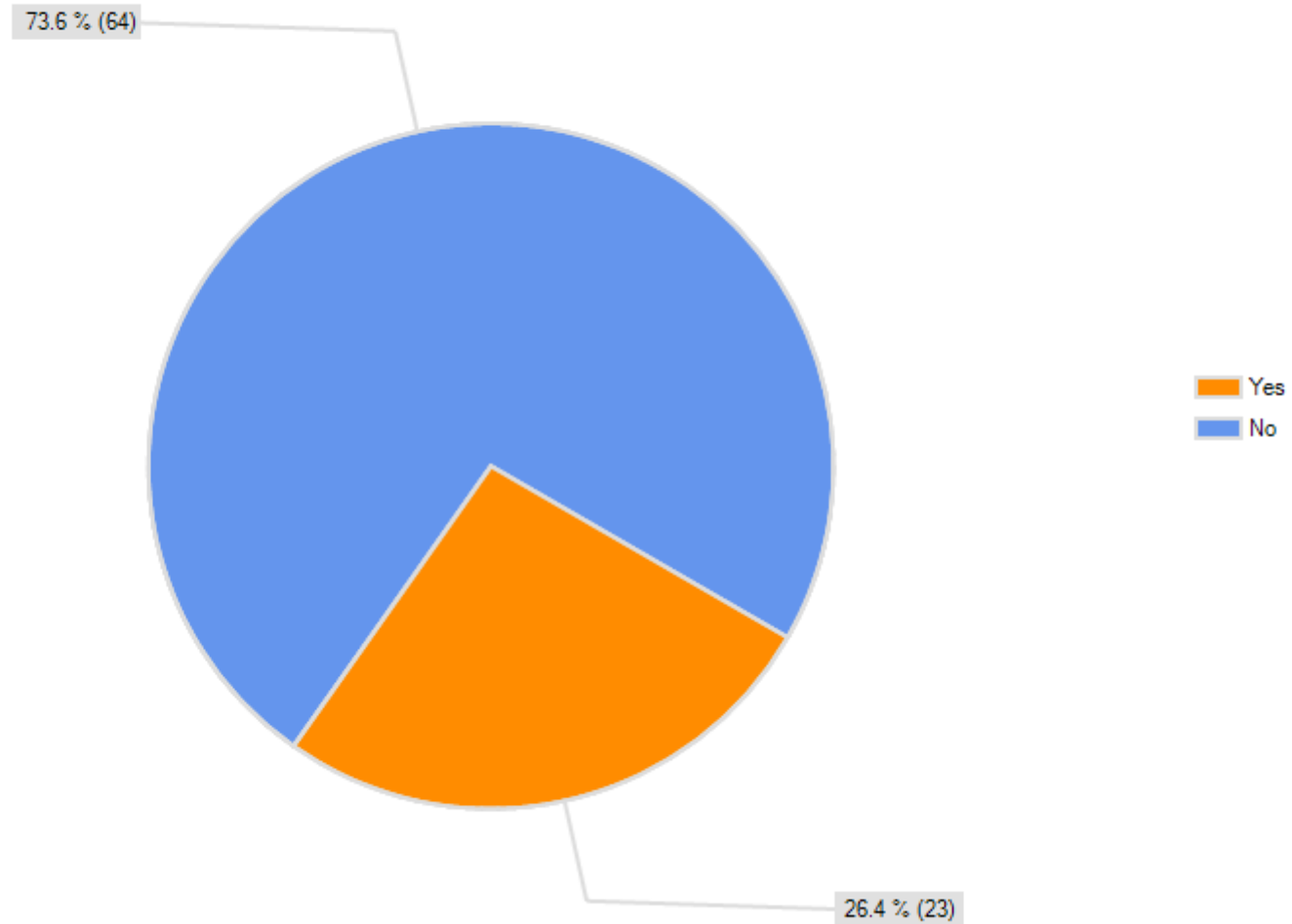
Did you extend your stay in the Hilton Head Island area because you wanted to attend this festival?



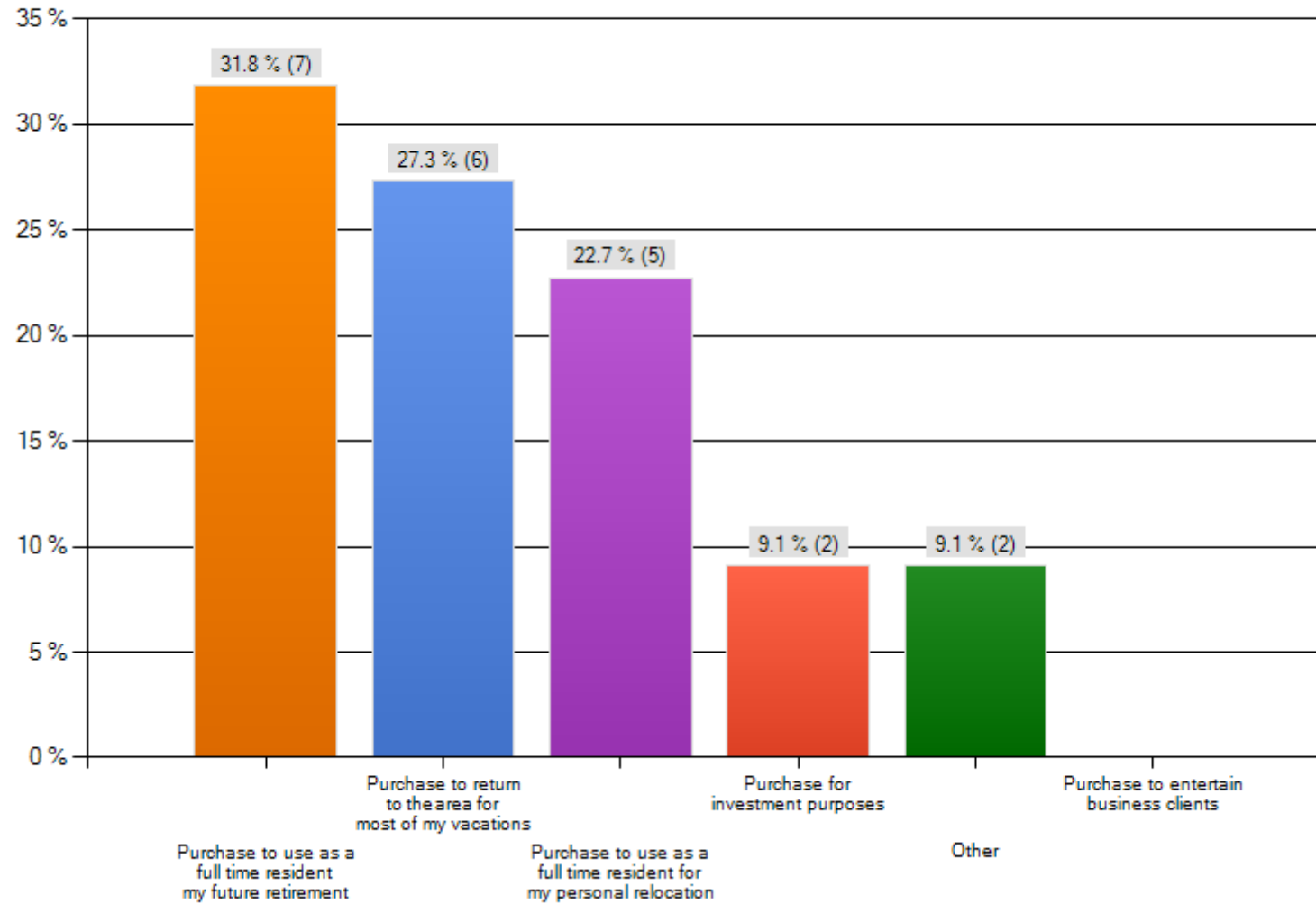
How many additional days are you staying because you wanted to attend this festival?



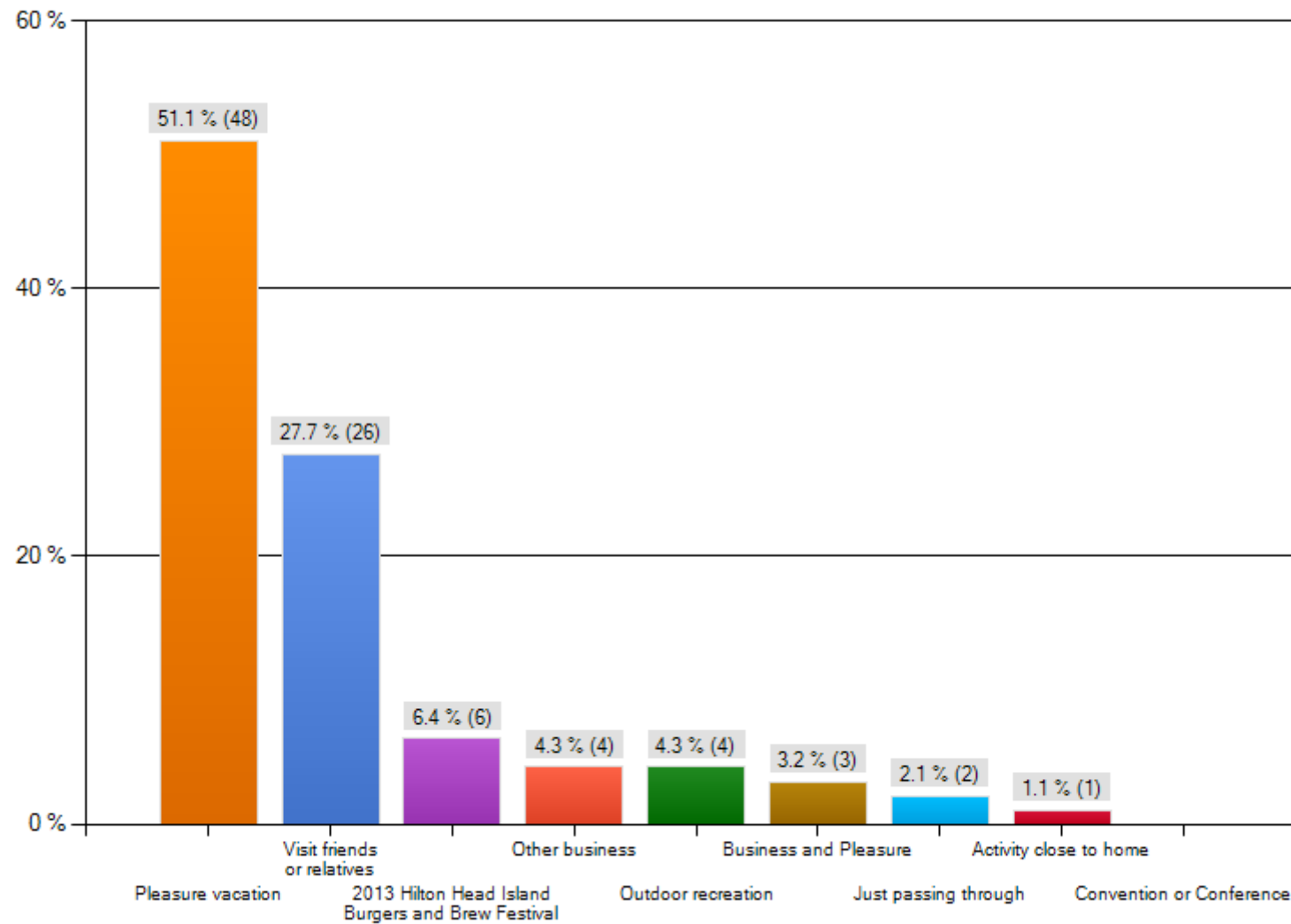
Has attending this festival increased any interest in purchasing residential real estate in the Hilton Head Island area for either full or part time purposes?



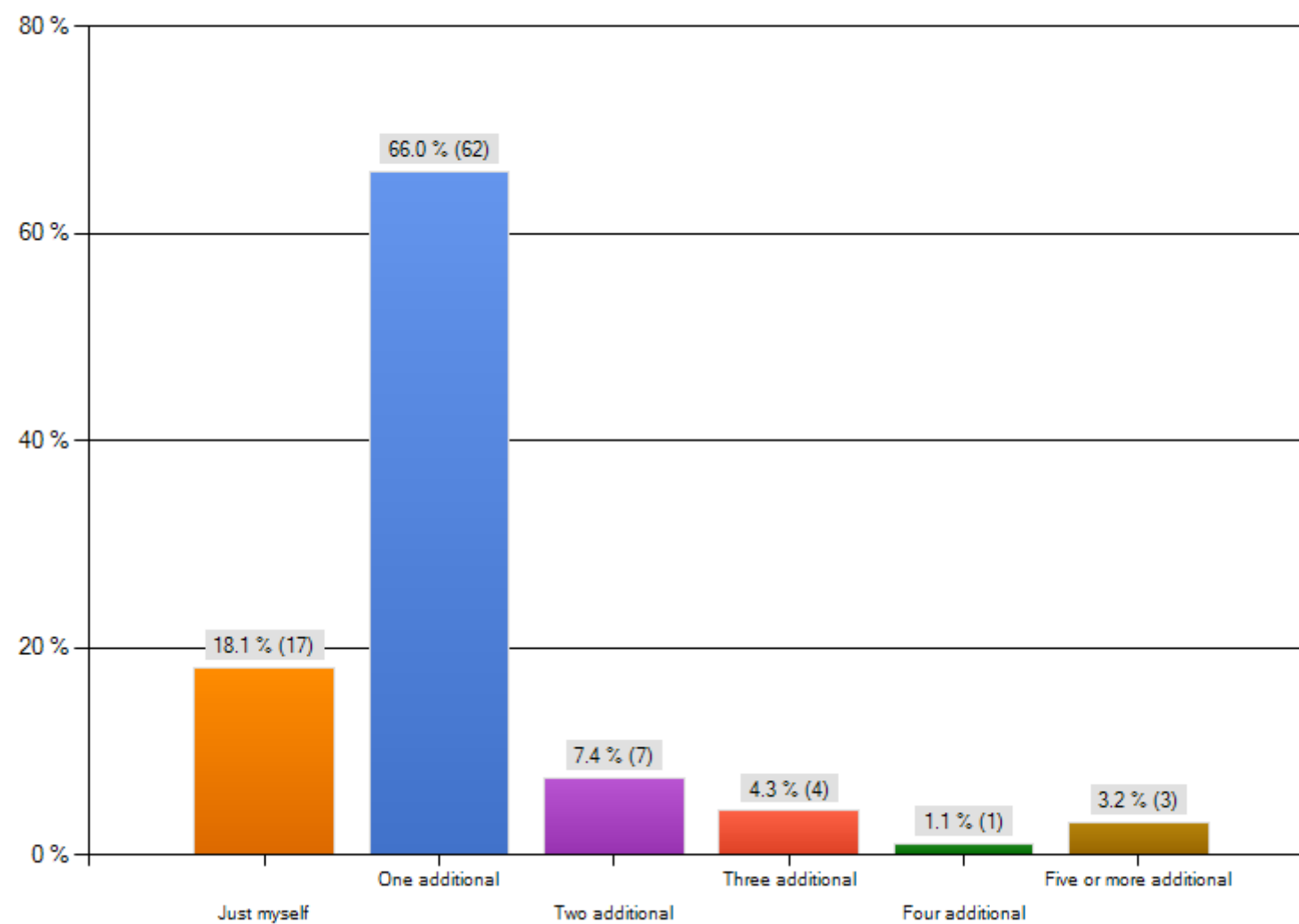
What would be the primary reason for you purchasing residential real estate in the Hilton Head Island area?



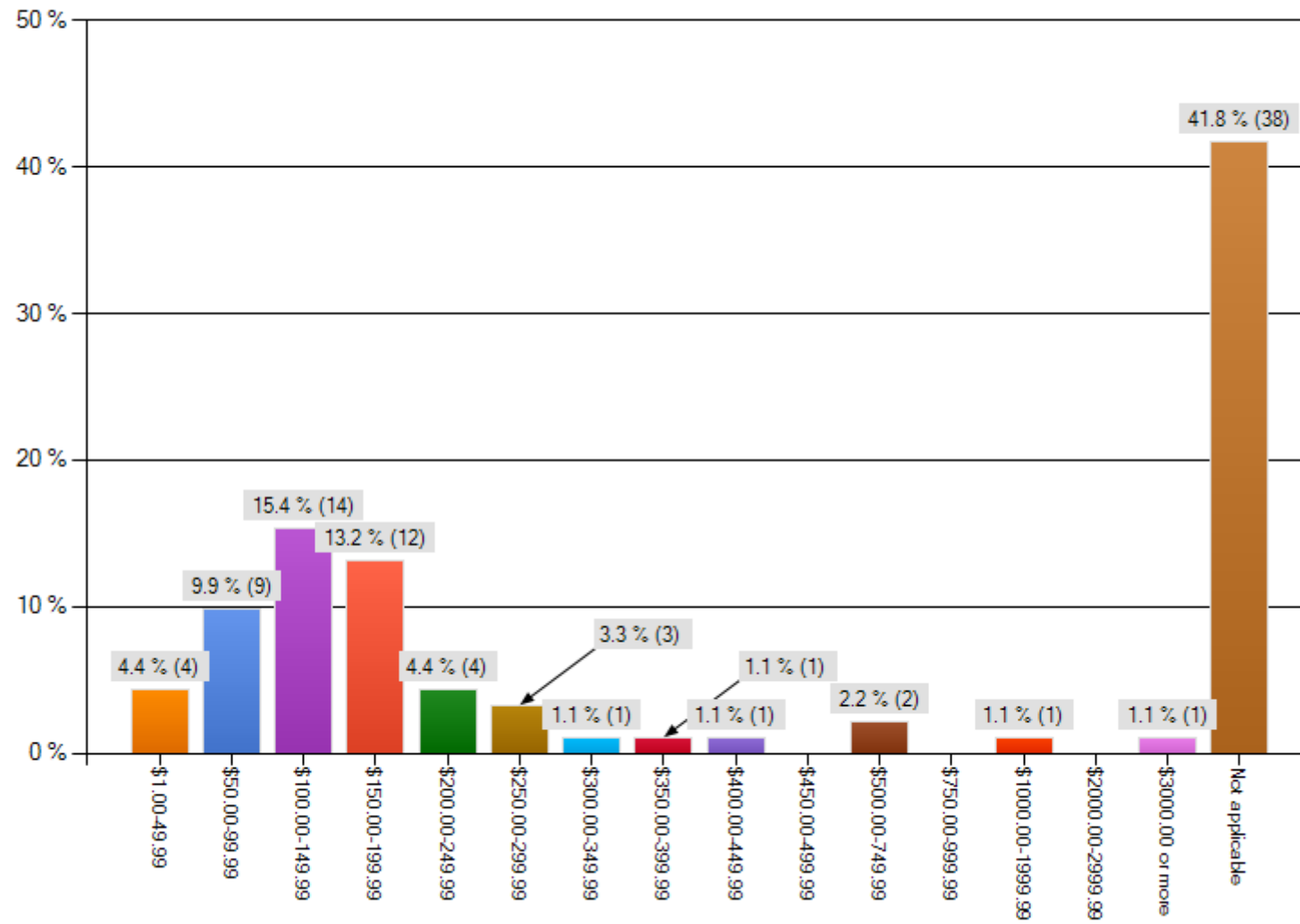
What was the primary reason for this visit to Hilton Head Island?



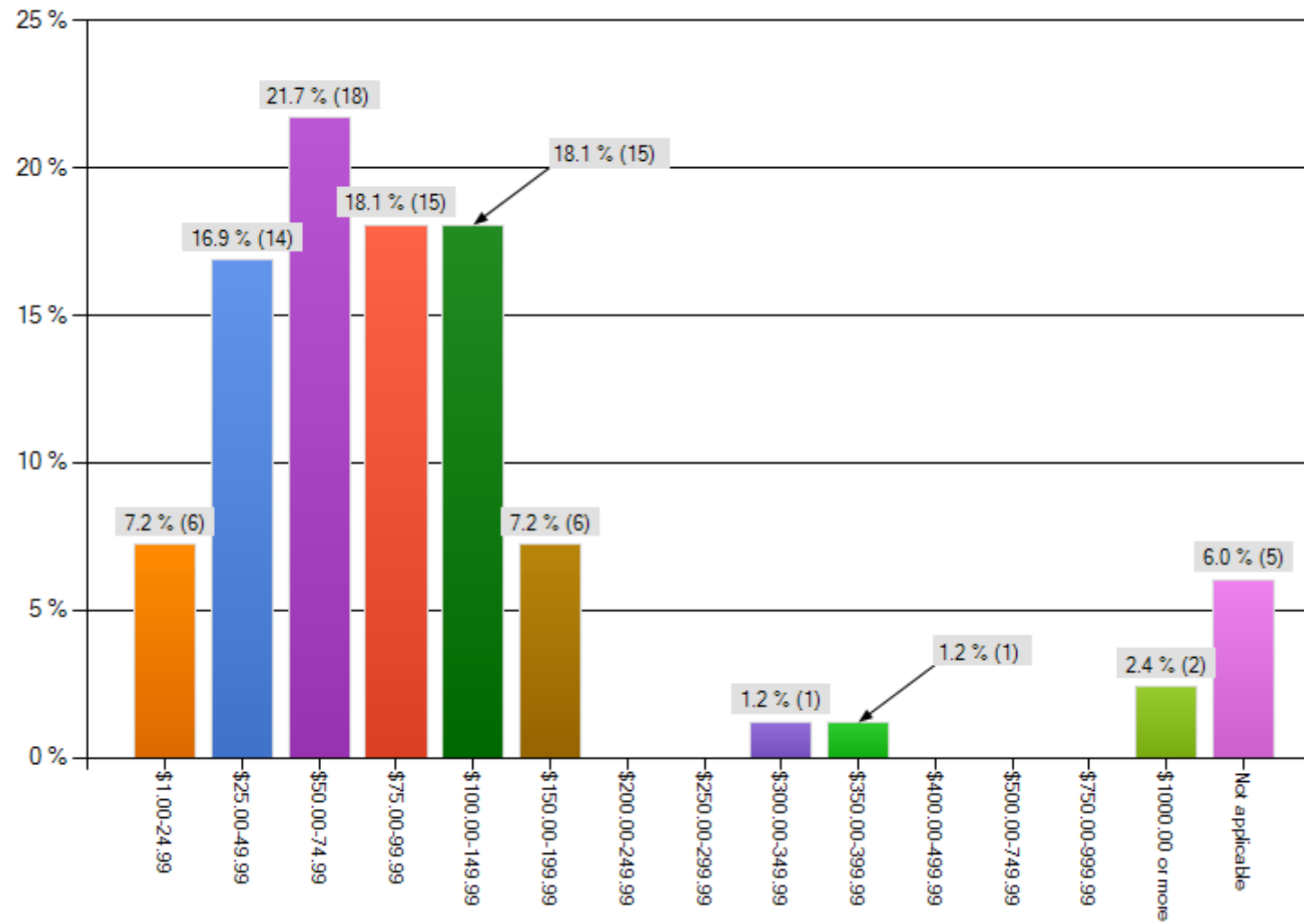
How many additional people are you financially responsible for during this trip?



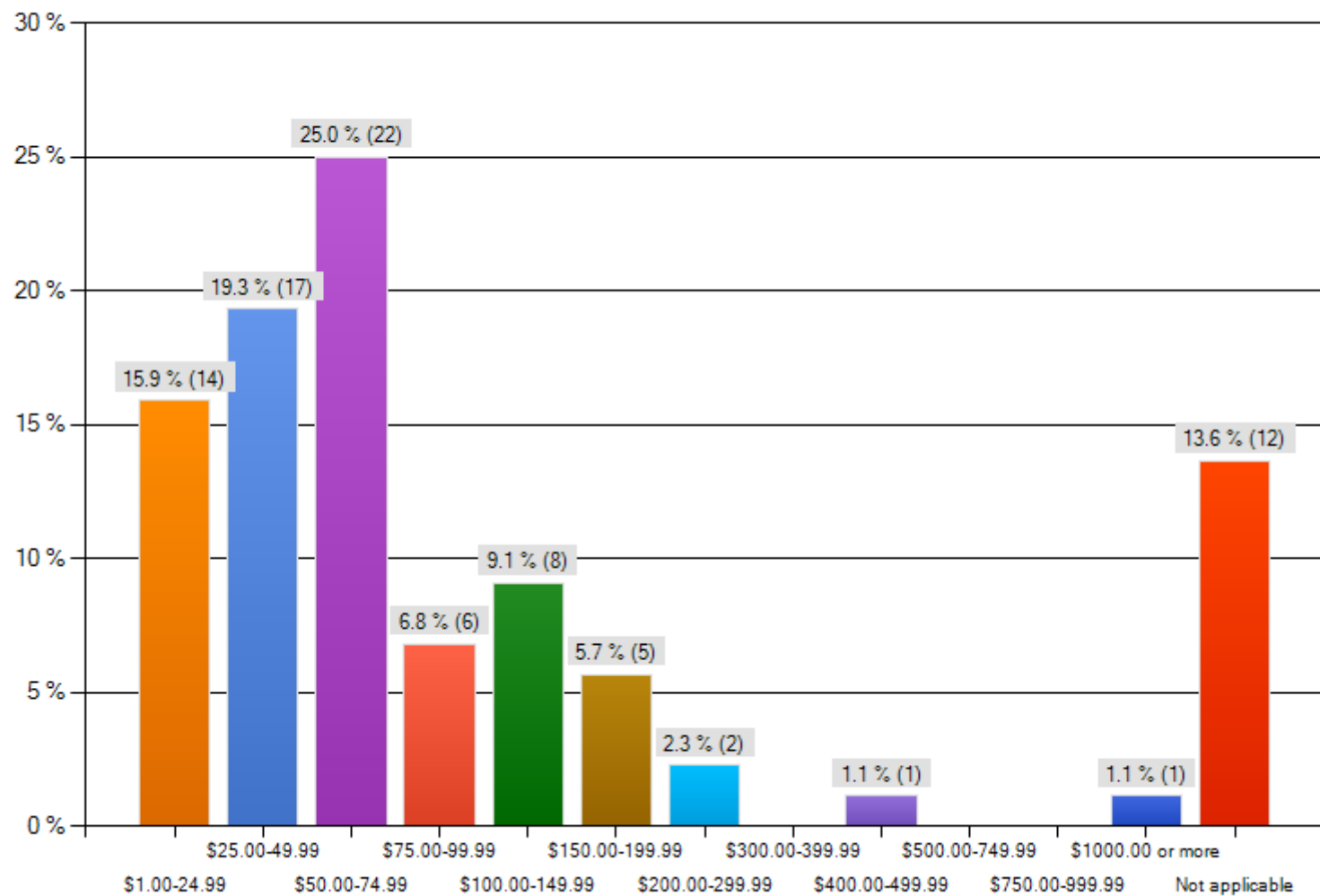
Approximately, how much will you spend on lodging PER NIGHT?



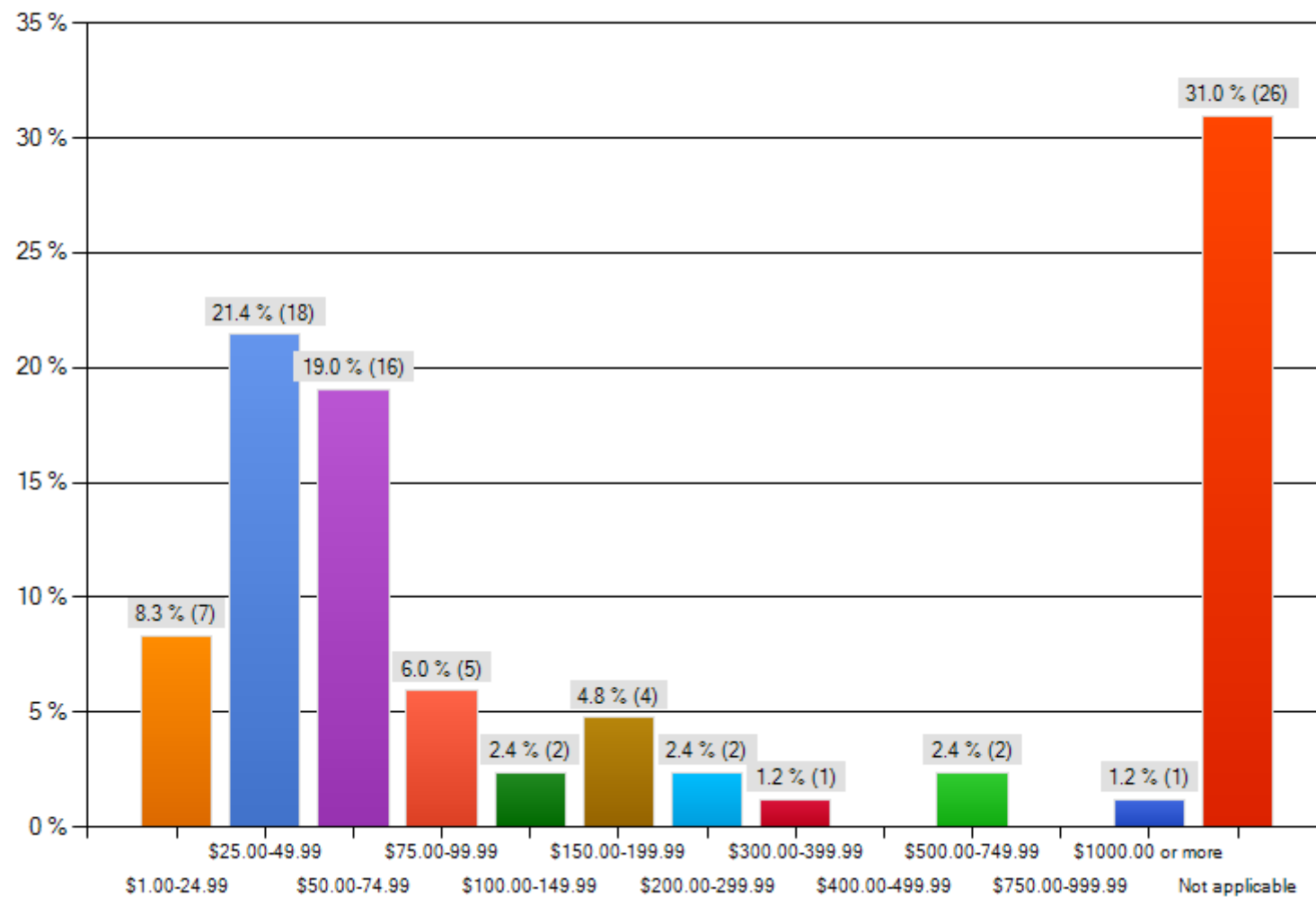
Approximately, how much do you think you'll spend on restaurant dining PER DAY?



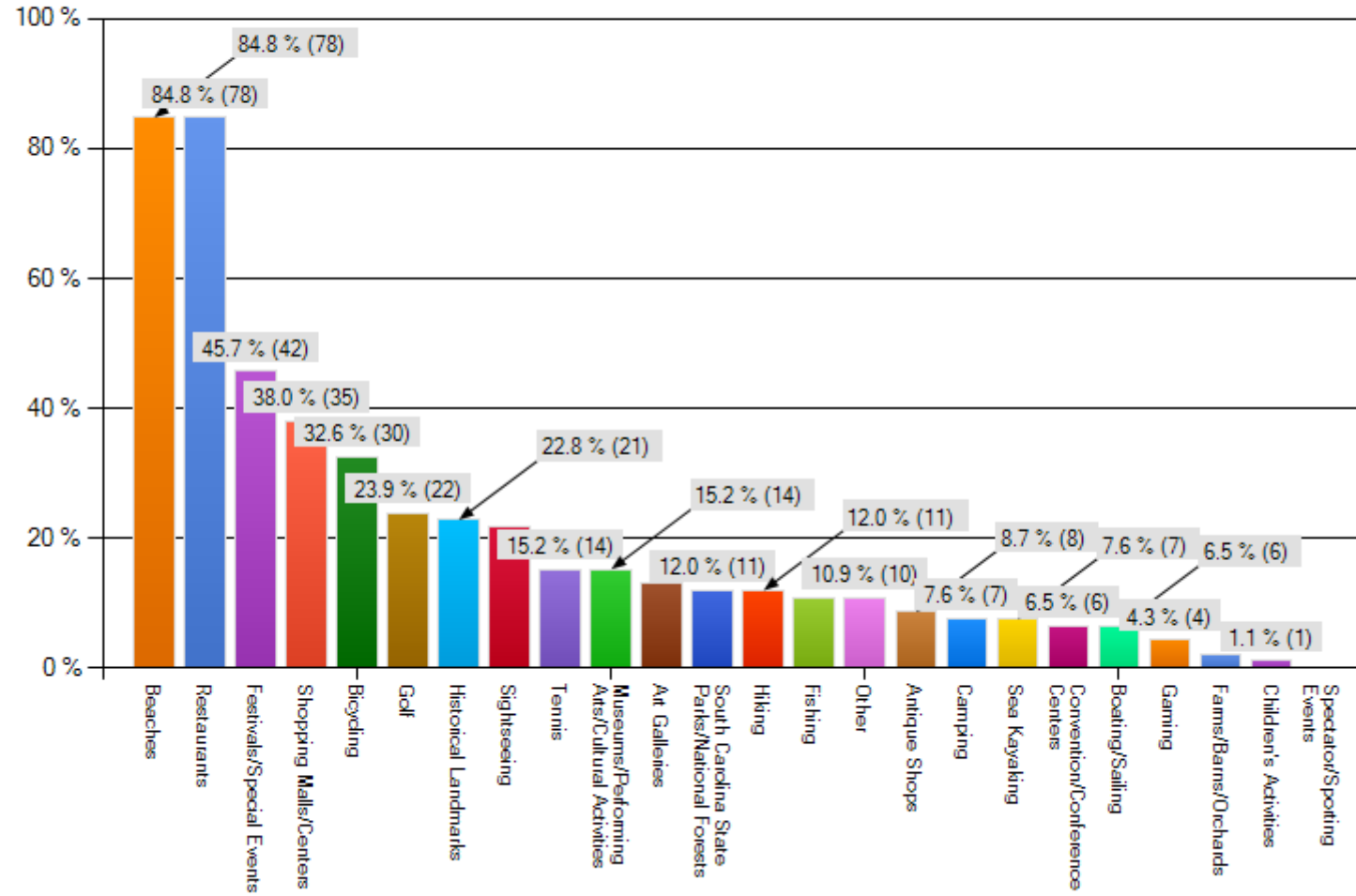
Approximately, how much do you think you'll spend on retail purchases PER DAY (i.e. clothes, gifts, souvenirs, etc.)?



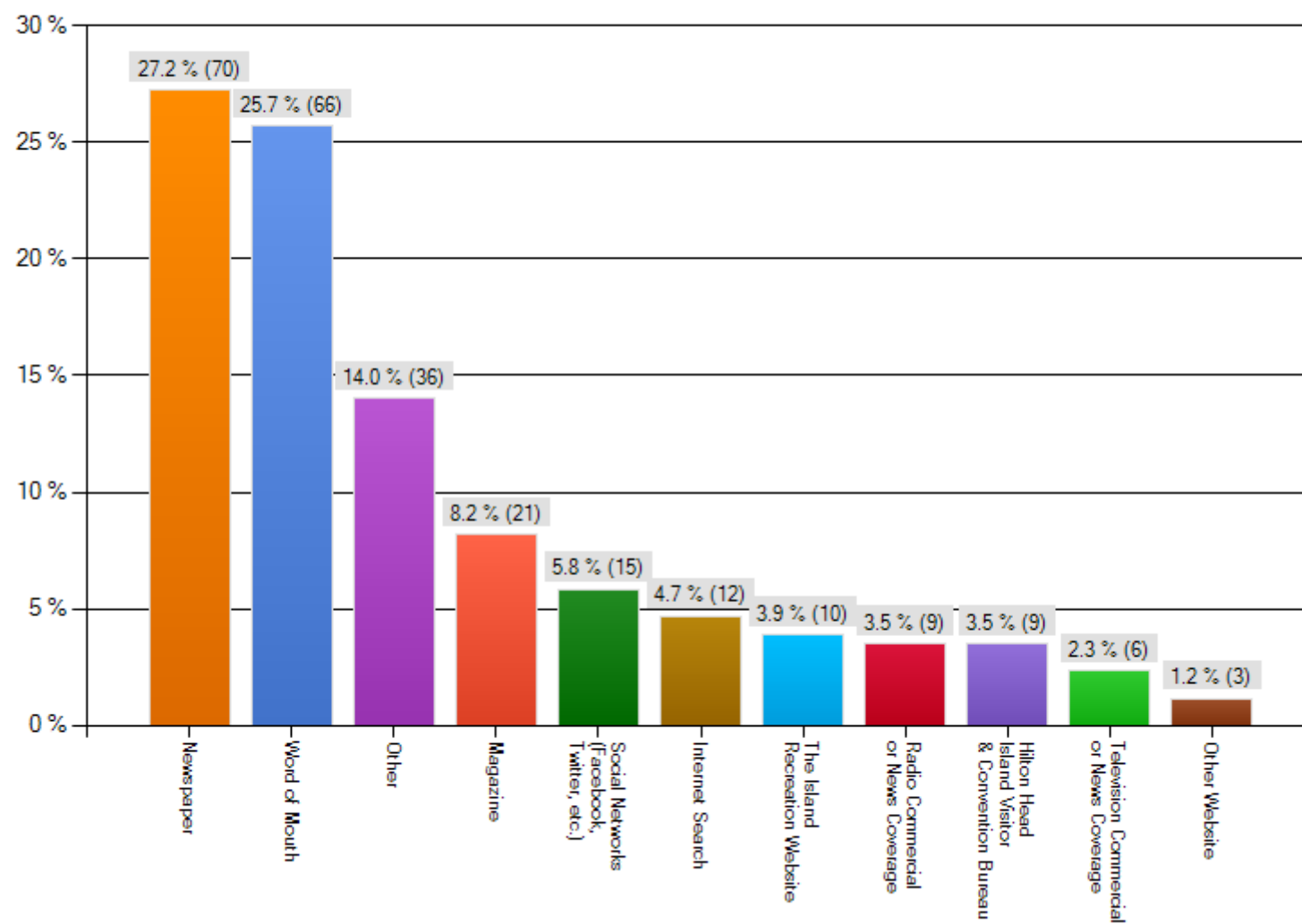
Approximately, how much do you think you'll spend on recreation expenses (i.e. golf, tennis, bicycling, etc.) PER DAY?



Please indicate if you intend on visiting (or have visited) any of the following tourist facilities or participating (or participated) in any of the listed activities while visiting Hilton Head Island.
Choose all that apply.



How did you first learn of the Hilton Head Island Burgers and Brew Festival?



How would you rate the following festival characteristics?

	Very Good	Good	Average	Poor	Very Poor	Don't Know – N/A	Rating Average	Rating Count
Music	58.9%	36.0%	4.0%	0.0%	0.4%	0.8%	4.54	235
Ambiance	55.0%	36.9%	6.4%	0.4%	0.0%	1.2%	4.48	249
Cost	45.0%	29.5%	19.1%	4.8%	0.8%	0.8%	4.14	251
Staff Friendliness	73.2%	22.4%	2.8%	0.4%	0.0%	1.2%	4.70	250
Kid's Area	32.9%	17.3%	5.8%	0.8%	0.4%	42.8%	4.42	243
Location	64.4%	28.4%	4.0%	0.8%	0.0%	2.4%	4.60	250

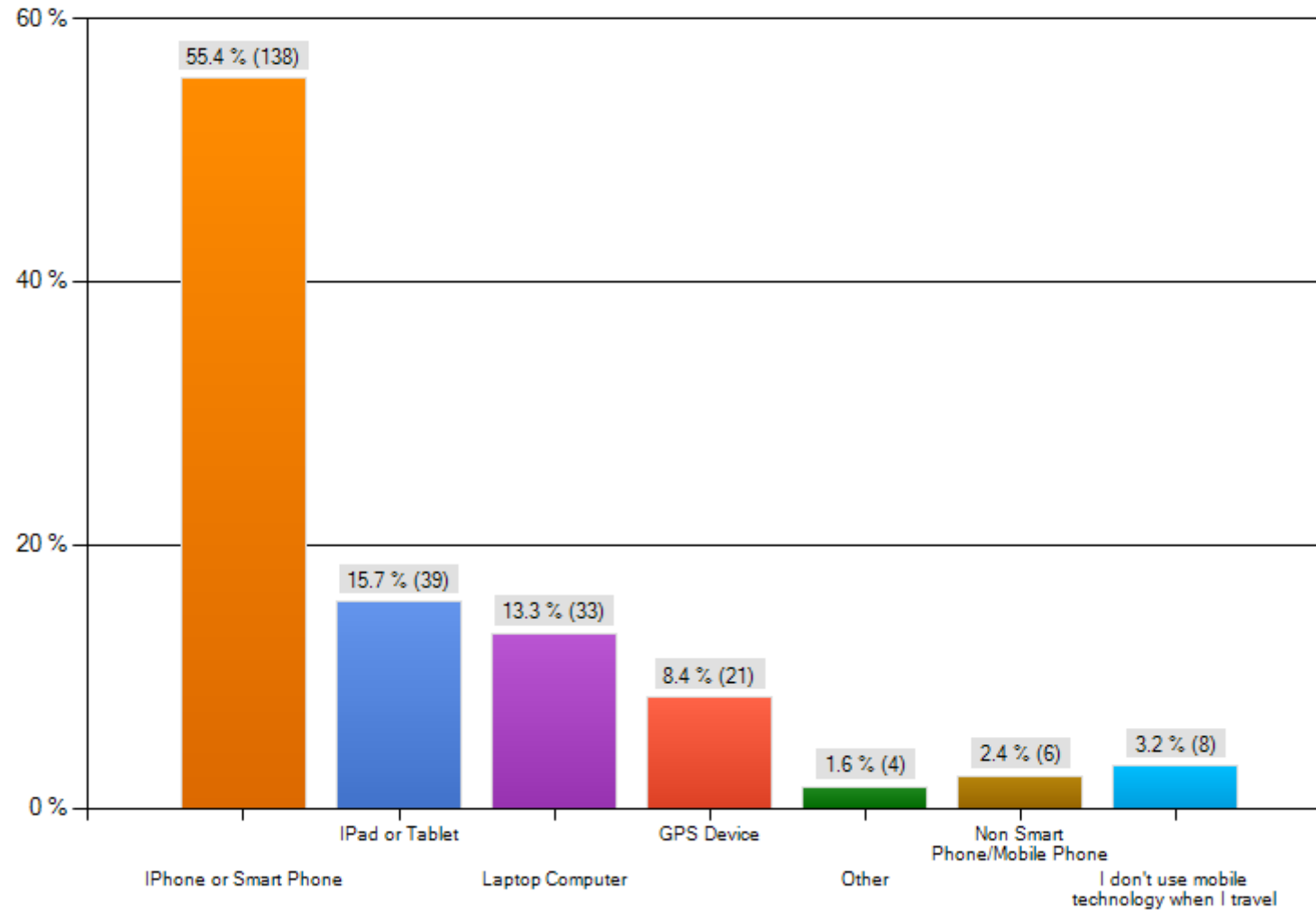
How would you rate the following festival characteristics?

	Very Good	Good	Average	Poor	Very Poor	Don't Know – N/A	Rating Average	Rating Count
Parking	38.1%	44.0%	13.1%	2.4%	0.4%	2.0%	4.19	252
Food Vender Variety	62.2%	34.3%	2.8%	0.0%	0.8%	0.0%	4.57	251
Quality of Food You Purchased	64.7%	29.0%	2.0%	0.4%	0.4%	3.6%	4.63	252
Quality of Beverage You Purchased	54.4%	32.4%	6.8%	0.8%	0.0%	5.6%	4.49	250
Quantity of Food Items Per Purchase	51.4%	32.8%	10.9%	1.6%	0.8%	2.4%	4.36	247
Quantity of Beverage Per Purchase	45.7%	31.8%	13.1%	2.9%	0.4%	6.1%	4.27	245

How would you rate the following festival characteristics?

	Very Good	Good	Average	Poor	Very Poor	Don't Know – N/A	Rating Average	Rating Count
Availability of Public Seating	42.6%	43.4%	12.7%	0.8%	0.0%	0.4%	4.28	251
Consistency of the “Burgers and Brew” Theme Throughout the Festival	58.9%	35.5%	4.8%	0.0%	0.0%	0.8%	4.54	248
Event Layout and Design	49.0%	43.7%	6.9%	0.4%	0.0%	0.0%	4.41	247
Crowd Flow	53.2%	41.5%	4.8%	0.4%	0.0%	0.0%	4.48	248
Overall Value of the Event	55.4%	35.7%	7.6%	1.2%	0.0%	0.0%	4.45	249

When traveling on vacation, what form of mobile technology do you primarily use when gathering information about the destination you're visiting?



The following items are related to your use of internet travel review sites when making travel plans. Please indicate your level of agreement for each statement.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Agree	Rating Average	Rating Count
I often read other tourists' online travel reviews to know what destinations make good impressions on others.	32.7%	45.4%	15.1%	4.4%	2.4%	4.02	251
To make sure I choose the right destination, I often read other tourists' online travel reviews.	28.6%	48.8%	16.5%	4.0%	2.0%	3.98	248
I often consult other tourists' online travel reviews to help choose an attractive destination.	24.7%	43.0%	22.7%	6.8%	2.8%	3.80	251
I frequently gather information from tourists' online travel reviews before I travel to a certain destination.	25.7%	47.0%	19.3%	5.6%	2.4%	3.88	249
If I don't read tourists' online travel reviews when I travel to a destination, I worry about my decision.	14.5%	22.6%	26.6%	24.6%	11.7%	3.04	248
When I travel to a destination, tourists' online travel reviews make me confident in traveling to the destination.	21.1%	49.2%	24.0%	4.1%	1.6%	3.84	246

How likely are you to return to next year's festival and recommend the festival to friends?

	Extremely Likely	Very Likely	Not Sure	Very Unlikely	Extremely Unlikely	Rating Average	Rating Count
Return to Next Year's Festival	54.1%	32.4%	12.3%	0.4%	0.8%	4.39	244
Recommend the Festival to Friends	57.1%	33.9%	7.8%	0.8%	0.4%	4.47	245

For More Information Contact
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843-208-8217