



Hilton Head Island Visitor Profile Survey

2023

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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Millennials represented 61% of the respondents, followed by Gen X (17.7%), and then Baby Boomers (17.9%). Over 56% of those surveyed had a Bachelor's degree or higher, and more than 57% had an annual household income of \$100,000 or more per year. Also, nearly 90% of the respondents were married.

POINT OF ORIGIN

The respondents resided in 140 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from east to west coast. More respondents resided in California than any other state (13.0%). Second was Texas (7.8%), followed then by Pennsylvania (7.1%), New York (6.5%), Ohio (5.5%), and Georgia (5.1%). In-state visitors did not make up a significantly large portion of the respondents (4.8%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: Los Angeles-Long Beach-Anaheim, CA; New York-Newark-Jersey City, NY-NJ; Atlanta-Sandy Springs-Roswell, GA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; San Francisco-Oakland-Fremont, CA; Washington-Arlington-Alexandria, DC-VA-MD-WV; and Chicago-Naperville-Elgin, IL-IN.

Canada was the top international origin market amongst respondents (38.0%), followed by the Middle East (26.8%), and Europe (16.9%).

THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (40.7%), relaxation (31.7%), and spending time with family (22.2%), followed by nature-based activities (19.5%), biking (17.4%), culinary experiences (14.3%), and shopping (14.3%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include water excursions, museums, and wellness activities.

Amongst Hilton Head Island's overnight visitors, 70.6% 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 4.7 for overnight visitors and 5.3 for day trip visitors. While the main mode of transportation around the island continues to be personal/family car (31.7%), transportation to the saw significant increase in flying into the destination from the prior survey (36.9% to 52.8%), with the majority of visitors flying into Hilton Head Island Airport.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 8.1 nights, hotel visitors stayed 6.5 nights, timeshare visitors stayed 8.0 nights, and second homeowners stayed 9.7 nights. The overall average was 6.9 nights.

Resorts stood out as the most popular choice of paid accommodation for overnight visitors (56.1%), followed by home/villa rentals (15.6%), hotels (13.7%), timeshares (6.1%), and second homes (3.0%).



TRAVEL PLANNING

VRBO remains by far the most popular online booking platform for villas/homes (32.2%), followed by local vacation rental companies (22.2%) and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (10.8%). The percentage of respondents booking via Airbnb remains steady year-to-year at around 11%.

Other destinations like Gulf Shores, Alabama Golf Trail, Hawaii, the Caribbean, and the Outer Banks were the top competitors for Hilton Head Island as alternative beach destinations. The top competing market was Gulf Shores.

Top reasons for choosing to visit Hilton Head Island were beach destination (32.6%), wanting to visit nature-based attractions (23.4%), previous visitation (20.4%), wanting to visit heritage attractions (18.2%), and word-of-mouth/recommendation (12.2%).

Of those visitors surveyed, 80.2% indicated an intention to return to visit Hilton Head Island, which signals a high degree of trip satisfaction.

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=169), 33.7% had never visited the Hilton Head Island / Bluffton area before, and 50.3% had visited one to five times before.

Of those non-visitors, 47.0% traveled elsewhere, 26.0% plan to visit in the future, 4.0% were hesitant because of unpredictable weather events, 3.0% mentioned health reasons, 2.0% did not find what they were looking for, and 2.0% did not travel at all. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (42.0%) and South (27.0%) were the most popular. Nonetheless, 48.8% 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 (50.6%) 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/vacations were: relaxation & rejuvenation (72.2%), beaches (71.2%), passive outdoor adventures (63.7%), historic attractions (0.9%), and romantic couple getaways (60.8%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (76.9%), quality of dining options (74.6%), ease of access (73.3%), affordability (73.0%), quality of lodging options (72.6%), diversity of dining options (70.4%), and diversity of lodging options (65.9%).



METHODOLOGY

The 2023 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2023 and January 2024, 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 contacted following their anticipated dates of visitation. In addition, invitations to complete the survey were posted multiple times during the same time period on the social media channels of the Hilton Head Island Visitor & Convention Bureau and Explore Bluffton.

A total of 1,710 completed surveys were collected. This report is based largely on the 1,115 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 three times this study was completed, examining visitation in 2019, 2021, and 2022. When 2019 data is not presented, it is because the question was not asked in that survey.

The table below shows the visitor estimates for Hilton Head Island by segment for 2021, 2022, and 2023. 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	2021	2022	2023	Change (%) vs 2021	Change (%) vs 2022
Villa/Home Rentals	962,686	951,126	920,345	-4.4%	-3.2%
Hotels/Resorts	508,977	497,574	481,328	-5.4%	-3.3%
Timeshares	481,934	481,461	477,628	-0.9%	-0.8%
Second Homeowners	719,302	710,673	674,278	-6.3%	-5.1%
Non-paying Guests	186,667	184,428	174,983	-6.3%	-5.1%
Day trippers	267,290	264,083	255,358	-4.5%	-3.3%
Total Visitors	3,126,856	3,089,346	2,983,919	-4.6%	-3.4%

Table 1: Visitor Estimates for 2021-2022 and Percent Change Comparison



SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021	2022	2023
Gender				
Female	67.4%	62.5%	48.8%	54.1%
Male	32.6%	37.4%	51.1%	45.7%
Self-identify	-	0.1%	-	0.3%
Marital Status				
Married	76.7%	76.7%	77.3%	86.4%
Single	8.5%	9.2%	9.9%	6.7%
Divorced	7.4%	7.7%	5.8%	3.4%
Living as Married	3.8%	-	-	-
Widowed	3.1%	5.3%	5.9%	2.8%
Separated	0.5%	1.1%	1.1%	0.7%
Education (highest level completed)				
Grade School	0.2%	0.7%	0.4%	0.9%
High School	8.0%	8.0%	6.5%	3.8%
Some College	19.6%	20.9%	21.5%	22.6%
Associates Degree (2 years)	13.1%	13.6%	13.2%	16.0%
Bachelor's Degree (4 years)	31.5%	32.9%	32.3%	33.0%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%
Age				
19 years or younger	0.1%	0.1%	0.1%	0.3%
20 to 29 years	0.9%	10.5%	23.8%	24.1%
30 to 39 years	5.9%	16.5%	28.8%	39.4%
40 to 49 years	15.3%	12.6%	13.1%	8.3%
50 to 59 years	26.8%	18.7%	10.9%	9.4%
60 to 69 years	34.4%	25.8%	14.2%	11.6%
70 years and over	15.9%	14.5%	8.6%	6.3%
Not Applicable	0.6%	1.4%	0.3%	0.5%
Household Income				
Under \$24,999	1.4%	2.3%	1.5%	1.1%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%
Not Applicable	18.8%	-	-	-
N	1,682	1,884	1,913	1,154

Table 2: Demographics

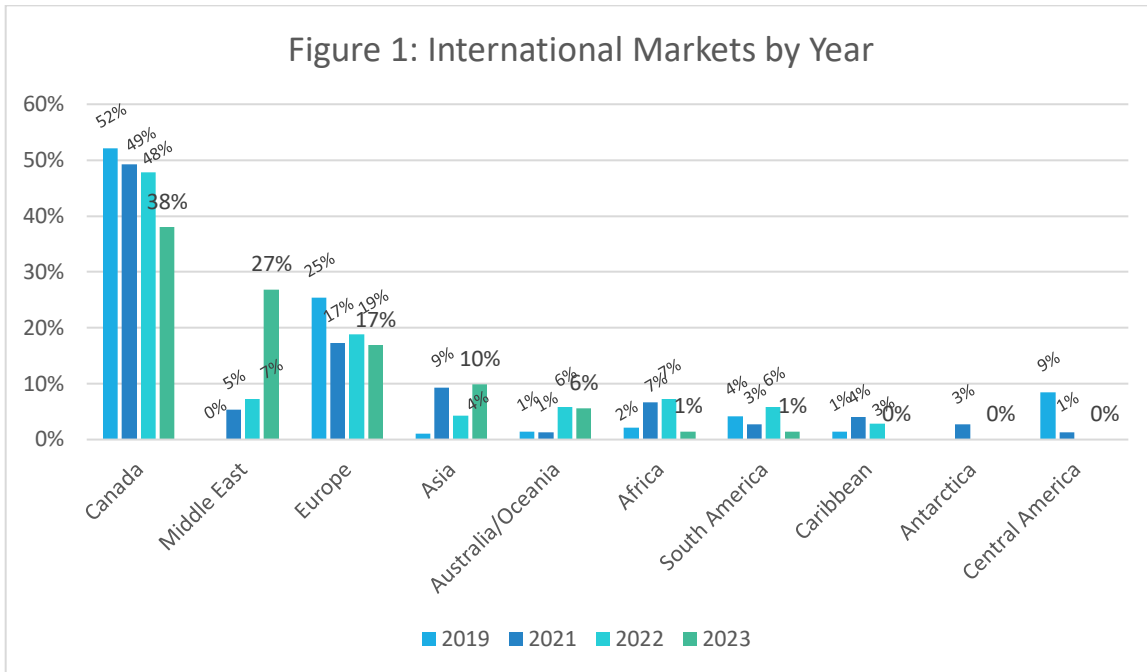
SAMPLE POINT OF ORIGIN

ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	Los Angeles-Long Beach-Anaheim, CA	106	9.3%
2	New York-Newark-Jersey City, NY-NJ	79	6.9%
3	Atlanta-Sandy Springs-Roswell, GA	44	3.9%
4	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
5	San Francisco-Oakland-Fremont, CA	39	3.4%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
7	Chicago-Naperville-Elgin, IL-IN	34	3.0%
8	Pittsburgh, PA	33	2.9%
9	Charlotte-Concord-Gastonia, NC-SC	23	2.0%
10	Columbus, OH	23	2.0%
11	Detroit-Warren-Dearborn, MI	20	1.8%
12	Charleston-North Charleston, SC	17	1.5%
13	Louisville/Jefferson County, KY-IN	17	1.5%
14	Rural OH	16	1.4%
15	Boston-Cambridge-Newton, MA-NH	15	1.3%
16	Cincinnati, OH-KY-IN	15	1.3%
17	Houston-Pasadena-The Woodlands, TX	15	1.3%
18	Kansas City, MO-KS	15	1.3%
19	Albany-Schenectady-Troy, NY	14	1.2%
20	Baltimore-Columbia-Towson, MD	14	1.2%
21	Austin-Round Rock-San Marcos, TX	13	1.1%
22	Riverside-San Bernardino-Ontario, CA	13	1.1%
23	San Diego-Chula Vista-Carlsbad, CA	13	1.1%
24	Jacksonville, FL	12	1.1%
25	Wisconsin Rapids-Marshfield, WI	12	1.1%
26	Greenville-Anderson-Greer, SC	11	1.0%
27	St. Louis, MO-IL	11	1.0%
28	Akron, OH	10	0.9%
29	Columbia, SC	10	0.9%
30	Rural TX	10	0.9%
	Other	408	35.8%
	Total	1,141	

Table 3: ZIP Code Analysis – Top 30 MSAs

International Markets

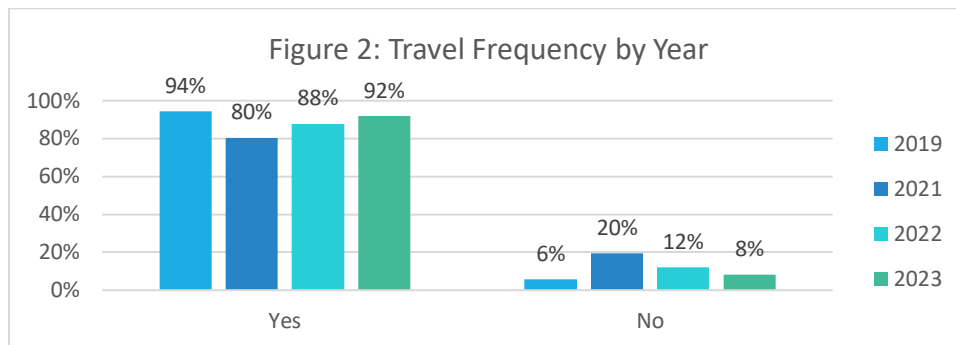


	2019	2021	2022	2023
Canada	52.1%	49.3%	47.8%	38.0%
Middle East	0.0%	5.3%	7.2%	26.8%
Europe	25.4%	17.3%	18.8%	16.9%
Asia	1.0%	9.3%	4.3%	9.9%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%
Africa	2.1%	6.7%	7.2%	1.4%
South America	4.2%	2.7%	5.8%	1.4%
Caribbean	1.4%	4.0%	2.9%	-
Antarctica	-	2.7%	-	-
Central America	8.5%	1.3%	-	-
N	71	75	69	71

Table 4: International Markets by Year

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

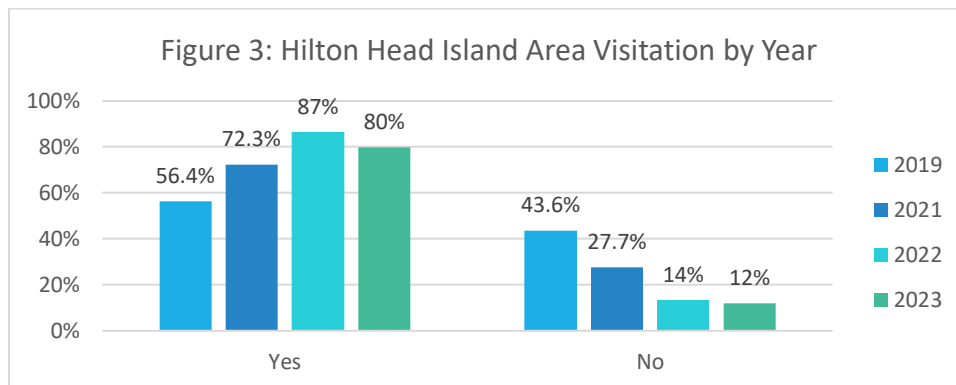
Within the last 12 months have you traveled or taken a vacation?¹



	2019	2021	2022	2023
Yes	94.3%	80.4%	87.8%	91.8%
No	5.7%	19.6%	12.2%	8.2%
N	1,684	2,084	2,918	1,710

TABLE 5: Travel Frequency by Year

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



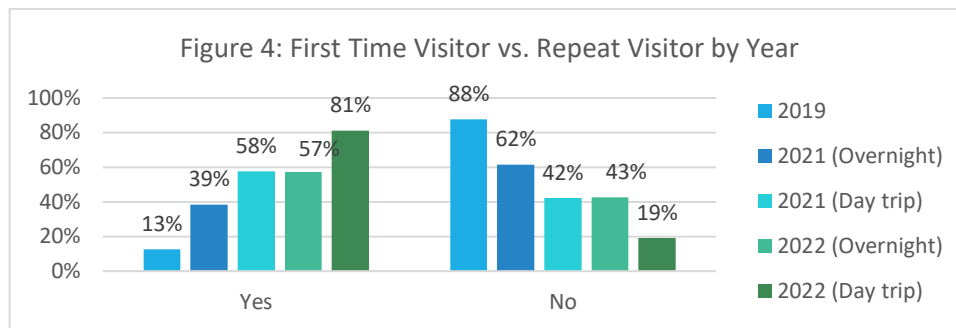
	2019	2021	2022	2023
Yes	56.4%	72.3%	86.5%	79.8%
No	43.6%	27.7%	13.5%	12.0%
N	1,713	1,675	2,547	1,570

TABLE 6: Hilton Head Island Area Visitation by Year

¹ For the 2019 report, these questions asked about the last 18 months instead of the last 12 months. Also, in 2019 the second question was asked of all respondents, whereas in 2021 and 2022 it was just asked of those who had travelled.

HILTON HEAD ISLAND VISITORS

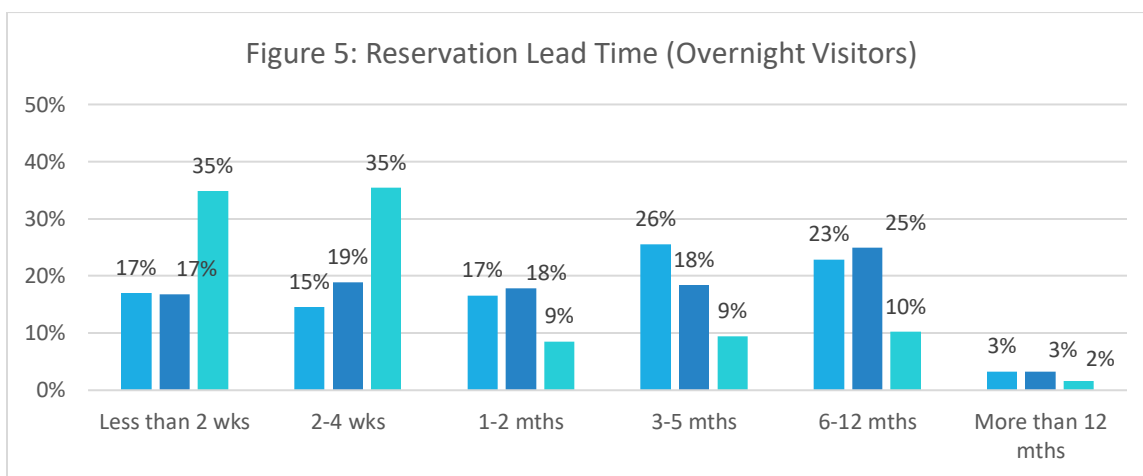
Was that your first time visiting Hilton Head Island?



	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Yes	12.5%	38.5%	57.8%	57.4%	81.0%	28.0%	70.6%
No	87.5%	61.5%	42.2%	42.6%	19.0%	72.0%	29.4%
N	946	991	45	1,477	79	1,077	34

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.)?



	2021	2022	2023
Less than 2 weeks	17.0%	16.8%	34.9%
2 weeks to 4 weeks	14.6%	18.9%	35.4%
1 to 2 months	16.6%	17.8%	8.5%
3 to 5 months	25.5%	18.4%	9.4%
6 to 12 months	22.9%	24.9%	10.2%
More than 12 months	3.3%	3.2%	1.6%
N	991	1,479	1,076

TABLE 8: Reservation Lead Time

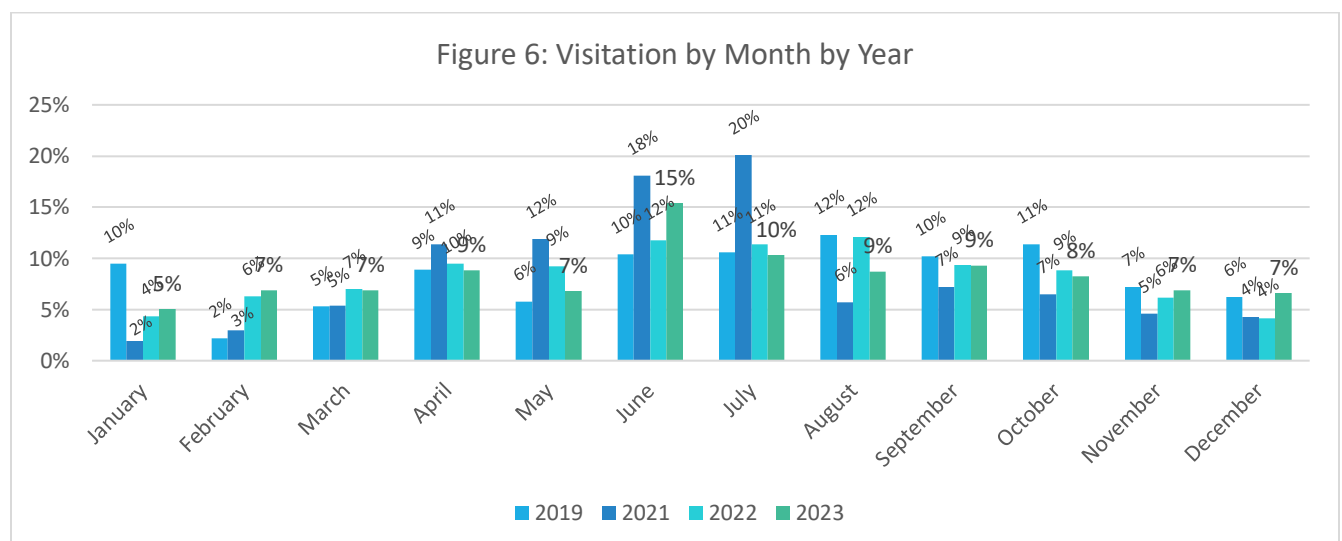
When did you make your most recent trip to Hilton Head Island?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
2018	12.9%						
2019	77.8%						
2020	9.3%	14.1%	26.5%				
2021		85.9%	73.5%				
2022				100.0%	100.0%		
2023						100.0%	100.0%
N	951	1,040	34	1,477	79	1,044	33

TABLE 9: Visitation Year by Year

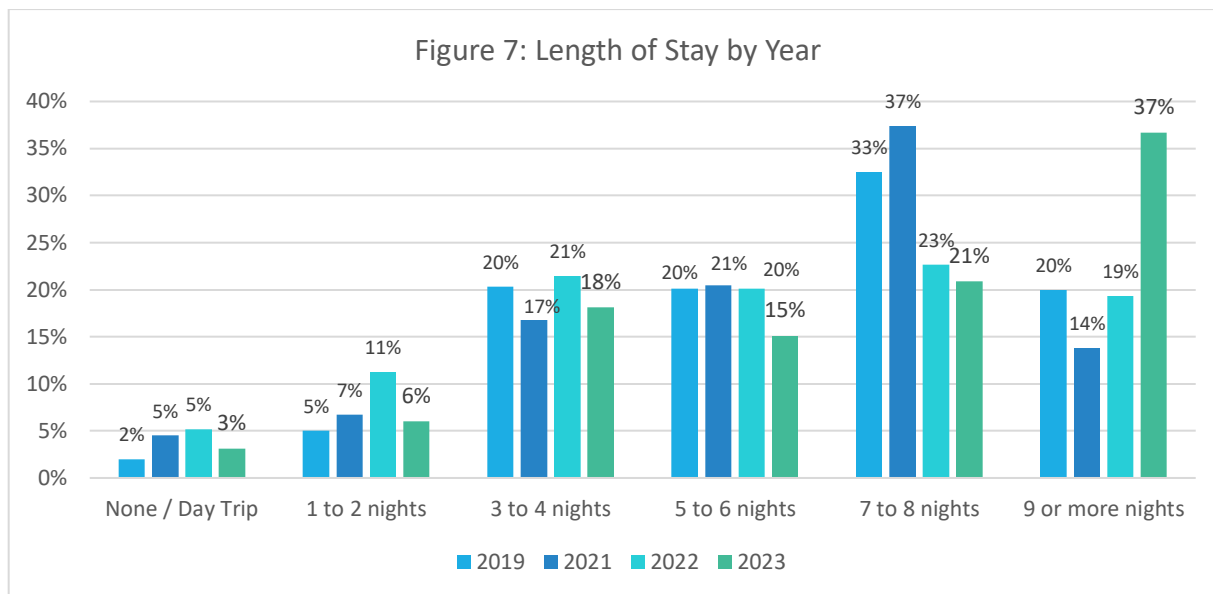
	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
January	9.5%	1.9%	0.0%	4.3%	4.3%	5.1%	3.0%
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	0.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%
November	7.2%	4.7%	0.0%	6.3%	2.9%	6.9%	0.0%
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%
N	951	1,504	34	1,361	70	1044	33

TABLE 10: Visitation by Month by Year



Note: For the 2019 survey, data collection occurred exclusively in January/February; for the 2021 survey, data collection occurred on a continuous basis from June onwards; and for the 2022 survey forward, data collection occurred on a continuous basis throughout the year.

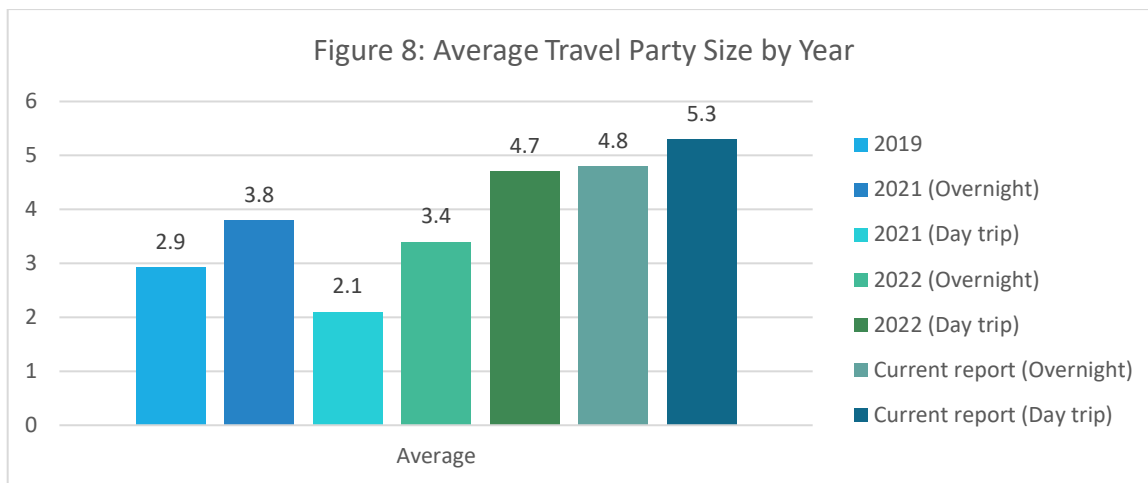
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023
None/day trip only	2.0%	4.5%	5.2%	3.1%
1 night	1.9%	1.8%	2.4%	0.4%
2 nights	3.1%	4.9%	8.9%	5.6%
3 nights	10.3%	7.5%	11.3%	10.2%
4 nights	10.0%	9.3%	10.2%	7.9%
5 nights	7.7%	9.6%	10.5%	7.5%
6 nights	12.4%	10.9%	9.5%	7.6%
7 nights	30.4%	34.0%	19.3%	15.4%
8 nights	2.1%	3.4%	3.4%	5.5%
9 nights	2.3%	2.6%	1.8%	3.7%
10 nights	3.4%	3.1%	3.2%	3.7%
11 nights	0.5%	0.4%	1.3%	2.6%
12 nights	0.8%	0.9%	1.4%	3.7%
13 nights	0.6%	0.7%	0.8%	2.9%
14 nights	4.8%	4.2%	3.6%	4.4%
15 nights	0.5%	0.8%	1.1%	2.9%
More than 15 nights	7.1%	1.1%	6.2%	12.8%
N	950	996	1,519	1,103

TABLE 11: Length of Stay by Year

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



	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Average	2.9	3.8	2.1	3.4	4.7	4.8	5.3
N	951	995	45	1,477	79	1,042	30

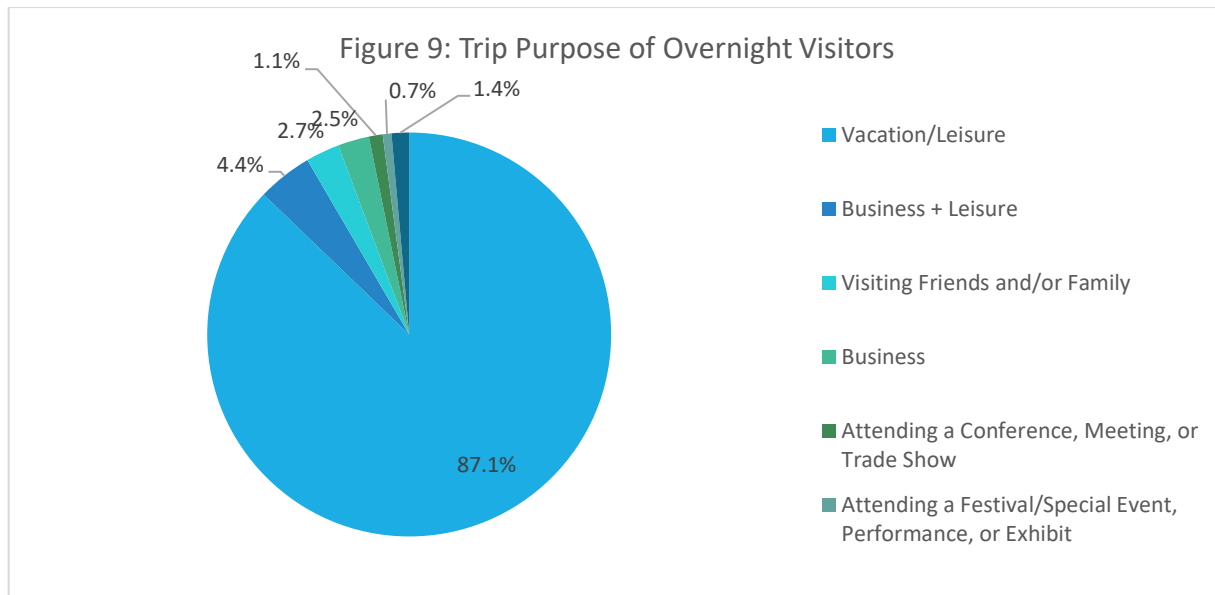
TABLE 12: Travel Party Size by Year

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	35.3%	25.6%	20.0%	15.7%	1.1%	0.5%	1.7%
	18-24	85.8%	6.9%	3.4%	1.1%	0.1%	0.1%	2.5%
	25-34	35.3%	6.5%	16.8%	13.0%	11.7%	13.6%	2.9%
	35-44	35.3%	21.5%	21.3%	17.9%	0.6%	0.6%	2.8%
	45-54	86.8%	5.6%	5.0%	0.6%	0.1%	0.2%	1.8%
	55-64	84.4%	7.7%	5.3%	0.4%	0.6%	0.1%	1.7%
	65+	83.3%	5.4%	9.2%	0.6%	-	0.2%	2.4%
Day Trip	Under 18	64.7%	14.7%	14.7%	-	-	2.9%	2.9%
	18-24	67.6%	14.7%	5.9%	-	-	5.9%	5.9%
	25-34	44.1%	14.7%	8.8%	5.9%	5.9%	5.9%	14.7%
	35-44	64.7%	14.7%	8.8%	-	2.9%	2.9%	5.9%
	45-54	79.4%	11.8%	5.9%	2.9%	-	-	-
	55-64	79.4%	5.9%	2.9%	2.9%	-	2.9%	5.9%
	65+	82.4%	11.8%	5.9%	-	-	-	-

TABLE 13: Travel Party Ages by Year

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



	2021	2022	2023
Vacation/Leisure	82.1%	74.3%	87.1%
Business + Leisure	6.7%	6.9%	4.4%
Visiting Friends and/or Family	3.9%	5.0%	2.7%
Business	2.1%	5.3%	2.5%
Attending a Conference, Meeting, or Trade Show	2.3%	4.2%	1.1%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%	2.5%	0.7%
Other²	1.9%	1.7%	1.4%
N	995	1,491	1,081

TABLE 14: Trip Purpose of Overnight Visitors

Day Trip Visitors:

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

	2021	2022	2023
Part of a vacation	57.8%	72.2%	76.5%
Day trip from home	42.2%	27.8%	23.5%
N	45	79	34

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

Where did you stay overnight?

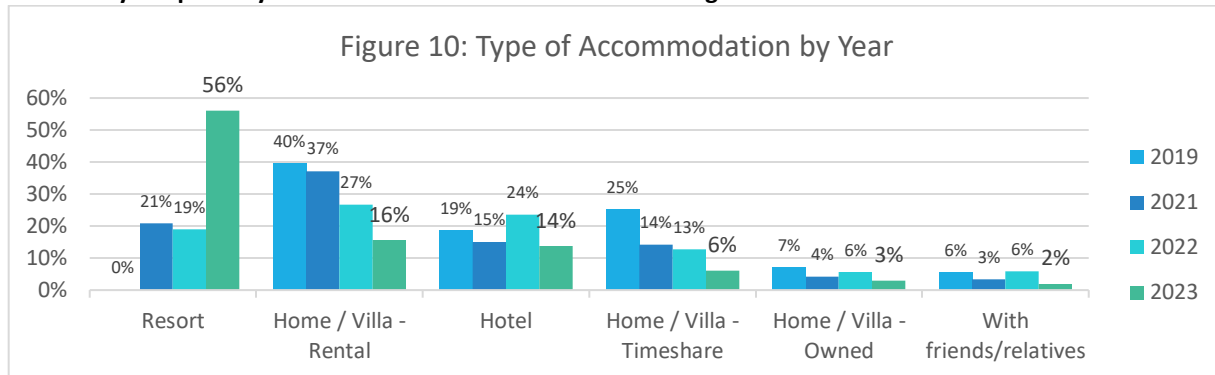
	2021	2022	2023
Charleston	19.2%	50.9%	26.9%
Savannah	42.3%	19.3%	23.1%
Tybee Island	7.7%	10.5%	19.2%
Beaufort	19.2%	14.0%	15.4%
Jacksonville	3.8%	3.5%	11.5%
Fripp Island	3.8%	-	-
Other	3.8%	1.8%	3.8%
N	26	57	26

TABLE 16: Day Trip Visitors' Overnight Location

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

Overnight Visitors:

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



	2019	2021	2022	2023
Resort	-	20.9%	19.0%	56.1%
Home / Villa - Rental	39.5%	37.2%	26.6%	15.6%
Hotel	18.6%	15.0%	23.6%	13.7%
Home / Villa - Timeshare	25.2%	14.2%	12.7%	6.1%
Home / Villa - Owned	7.1%	4.3%	5.6%	3.0%
With friends/relatives	5.6%	3.4%	5.9%	2.0%
RV park	1.1%	0.4%	1.5%	0.4%
Other	1.4%	0.3%	0.1%	-
None – Day Trip only	1.7%	4.3%	5.0%	3.0%
N	951	1,040	1,570	1,115

TABLE 17: Types of Accommodation by Year

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

Hampton Inn & Suites Bluffton-Sun City	14.7%
Sonesta Resort Hilton Head Island	10.5%
Hilton Beachfront Resort & Spa	10.0%
The Westin Hilton Head Island Resort	7.9%
Omni Hilton Head Oceanfront Resort	5.8%
Sea Pines Resort	3.7%
Barony Beach Club	3.2%
Beach House Hilton Head Island	3.2%
Comfort Suites Bluffton-Hilton Head Island	3.2%
Grand Hilton Head Inn	3.2%
N	190

TABLE 18: Top 10 Hotels or Resorts

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

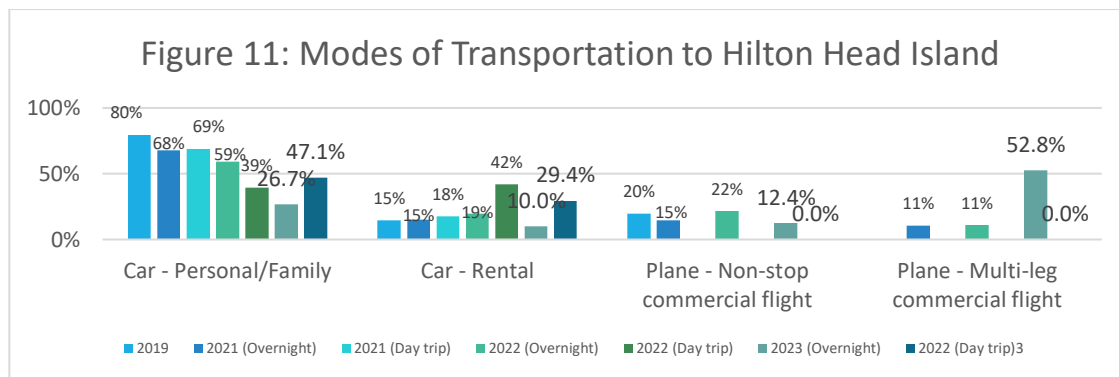
	2019	2021	2022	2023
Directly with owner	-	6.2%	6.0%	-
VRBO	32.8%	34.2%	29.2%	32.3%
A Local vacation rental company	22.7%	22.9%	24.7%	22.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%
Airbnb	2.4%	10.0%	12.0%	10.2%
Vacasa	-	4.9%	5.5%	6.6%
HomeAway	-	2.2%	3.5%	4.2%
TurnKey	-	1.3%	-	3.0%
I don't remember	3.5%	0.8%	3.0%	1.2%
Booking.com	-	0.3%	2.2%	0.6%
None	-	0.5%	0.5%	0.6%
Other	23.5%	1.6%	0.5%	8.4%
N		371	401	167

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)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Car - Personal/Family	79.5%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%
Car - Rental	14.7%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%
Plane - Non-stop commercial flight	19.5% ³	14.8%	-	21.5%	-	12.4%	-
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-
Plane - Private	0.2%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%
Personal RV	1.1%	2.2%	-	4.9%	1.3%	1.9%	17.6%
Motor Coach/Tour bus	0.0%	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%
Other	0.6%	0.6%	-	0.1%	-	0.2%	-
N	953	995	45	1,477	79	1,115	34

TABLE 20: Modes of Transportation to Hilton Head Island



Visitors Arriving by Plane:

At which airport did you land?

	2019	2021	2022	2023
Hilton Head Island	12.8%	39.8%	33.8%	81.6%
Savannah/Hilton Head International	69.5%	40.6%	38.1%	12.1%
Charleston	9.2%	8.8%	12.7%	3.3%
Atlanta	2.8%	5.6%	6.1%	1.4%
Jacksonville	1.4%	2.0%	5.5%	1.1%
Charlotte	1.4%	2.0%	3.3%	0.3%
Other	2.8%	1.2%	0.4%	0.3%
N	114	251	488	728

TABLE 21: Arrival Airport by Year

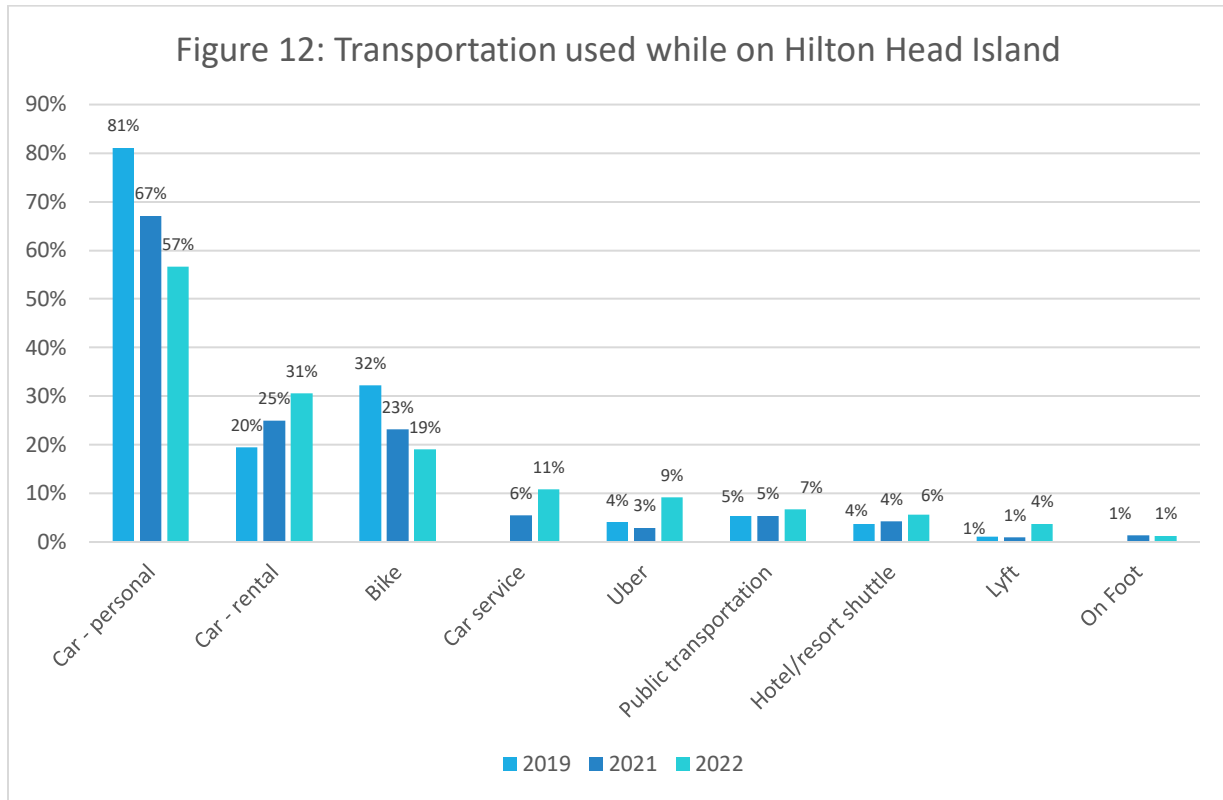
Which commercial airline did you use?

	2021	2022	2023
American Airlines	38.9%	44.8%	25.4%
Southwest	8.1%	9.0%	14.2%
Silver Airways	0.8%	1.8%	14.2%
Air Canada	5.3%	6.8%	12.8%
JetBlue	6.5%	3.6%	12.2%
Frontier	1.6%	2.3%	11.9%
Frontier	0.4%	2.3%	11.9%
Delta	16.6%	7.0%	2.6%
Allegiant	10.1%	8.1%	2.1%
Alaska	2.8%	10.4%	1.7%
Breeze	1.2%	3.2%	1.4%
Sun Country Airlines	0.4%	0.9%	0.1%
United	6.9%	1.8%	-
Spirit	0.4%	0.2%	-
N	247	442	720

TABLE 22: Commercial Airlines Used

³ The 2019 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?



	2019	2021	2022	2023
Car - personal	81.1%	67.1%	56.7%	31.7%
Car - rental	19.5%	25.0%	30.5%	19.4%
Bike	32.2%	23.2%	19.1%	15.2%
Car service	-	5.5%	10.9%	14.5%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%	6.8%	12.5%
Shuttle offered by the hotel/resort	3.7%	4.2%	5.7%	11.1%
Uber	4.1%	2.9%	9.2%	8.5%
Lyft	1.1%	1.0%	3.7%	5.8%
On Foot	-	1.4%	1.3%	0.8%
Other	-	0.1%	0.1%	-
N	948	995	1,477	1,115

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	\$201	\$335	\$185	\$107	\$162	\$57	\$274
Lodging	\$2,834	\$1,004	\$1,229	\$0	\$0	\$0	\$1,315
Food - Dining	\$606	\$833	\$907	\$579	\$401	\$166	\$763
Food - Grocery	\$338	\$692	\$251	\$314	\$171	\$107	\$573
Shopping	\$485	\$795	\$274	\$415	\$479	\$157	\$684
Spas	\$29	\$276	\$25	\$46	\$49	\$73	\$187
Golf	\$54	\$260	\$72	\$96	\$150	\$29	\$189
Biking	\$69	\$74	\$39	\$16	\$37	\$20	\$63
Performance/Visual Arts	\$35	\$272	\$18	\$12	\$57	\$71	\$183
Festivals	\$12	\$260	\$6	\$18	\$37	\$45	\$168
Museums/Historical Tours	\$42	\$242	\$32	\$12	\$33	\$74	\$163
Boating/Sailing/Fishing	\$137	\$288	\$203	\$31	\$175	\$91	\$231
Nature-based Activities	\$18	\$258	\$17	\$15	\$38	\$41	\$169
Dolphin Tours	\$56	\$272	\$34	\$8	\$48	\$58	\$187
Tennis	\$13	\$259	\$3	\$159	\$11	\$55	\$173
Other Expenses	\$55	\$288	\$64	\$75	\$161	\$13	\$204
Total Expenditure	\$4,864	\$5,890	\$3,352	\$1,894	\$1,917	\$1,414	\$5,241

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)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Beaches	73.5%	75.4%	55.6%	62.0%	38.0%	40.7%	44.1%
Relaxation	58.6%	51.5%	31.1%	34.1%	12.7%	31.7%	20.6%
Time with family/friends	48.4%	46.6%	24.4%	32.6%	10.1%	22.2%	26.5%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	11.3%	12.0%	2.2%	13.3%	3.8%	19.5%	23.5%
Biking	15.7%	16.4%	11.1%	21.3%	27.8%	17.4%	11.8%
Culinary	13.9%	12.2%	31.1%	14.2%	27.8%	14.3%	20.6%
Shopping	11.7%	10.9%	24.4%	10.7%	8.9%	14.3%	20.6%
Golf	16.3%	13.7%	8.9%	10.4%	13.9%	14.1%	2.9%
Business trip (convention, meeting, etc.)	1.2%	5.1%	4.4%	10.5%	24.1%	13.1%	2.9%
Health/wellness/fitness	2.1%	3.4%	11.1%	5.9%	6.3%	13.1%	8.8%
Boating / Sailing / Kayaking	1.6%	7.5%	11.1%	13.6%	16.5%	12.3%	26.5%
Festivals	4.0%	3.6%	6.7%	8.2%	3.8%	11.6%	8.8%
Attend sporting event	0.6%	4.7%	15.6%	11.2%	10.1%	11.3%	2.9%
Parks	1.4%	1.8%	6.7%	4.9%	5.1%	11.1%	2.9%
Heritage attractions / Museum / Historical tours	3.3%	6.5%	20.0%	10.6%	16.5%	6.1%	32.4%
Tennis	2.1%	1.7%	6.7%	2.6%	11.4%	3.9%	2.9%
Other	8.1%	4.1%	-	3.9%	2.5%	1.8%	5.9%
Wedding	-	1.2%	-	1.6%	0.0%	0.9%	2.9%
N	953	995	45	1,477	79	1,115	34

TABLE 25: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Beaches	83.2%	81.8%	42.2%	69.4%	51.9%	46.0%	44.1%
Biking	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%
Relaxation	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%
Shopping	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%
Time with family/friends	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%
Water excursions	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%
Attend sporting event	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%
Culinary	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%
Museum / Historical tours	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%
Health / Wellness / Fitness	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%
Golf	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%
Festivals	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%
Business/work	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%
Spas	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%
Tennis	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%
Sports activities	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%
Other	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%
N	950	995	45	1,477	79	1,115	34

TABLE 26: Activities Visitors Participated In

Which shopping locations did you visit?

	2019	2021 (Overnight)	2021 (Day trip)	2022 (Overnight)	2022 (Day trip)	2023 (Overnight)	2023 (Day trip)
Coligny Plaza	68.8%	64.7%	26.7%	54.4%	32.9%	31.6%	23.5%
Harbour Town	60.2%	55.8%	26.7%	44.2%	39.2%	29.2%	23.5%
Shelter Cove Harbour	47.8%	42.0%	17.8%	36.9%	21.5%	23.0%	20.6%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%	25.0%	8.9%	21.2%	29.4%
Downtown Bluffton	30.5%	25.4%	28.9%	31.1%	34.2%	20.4%	38.2%
Tanger Outlets	53.2%	34.9%	37.8%	26.1%	22.8%	19.6%	5.9%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%	21.7%	20.3%	18.3%	20.6%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%	25.5%	6.3%	18.1%	35.3%
Main Street Village	25.0%	20.2%	8.9%	24.6%	25.3%	14.9%	20.6%
South Beach Marina	25.2%	21.5%	11.1%	17.7%	15.2%	14.9%	23.5%
Village at Wexford	16.4%	10.9%	6.7%	12.8%	11.4%	10.9%	11.8%
Buckwalter shopping areas	2.9%	4.9%	11.1%	8.3%	10.1%	10.1%	8.8%
Other	5.5%	2.1%	2.2%	2.3%	1.3%	2.1%	67.6%
None	2.1%	1.5%	2.2%	0.7%	1.3%	0.7%	23.5%
N	945	995	45	1,477	79	1,115	34

TABLE 27: Shopping Locations Visited

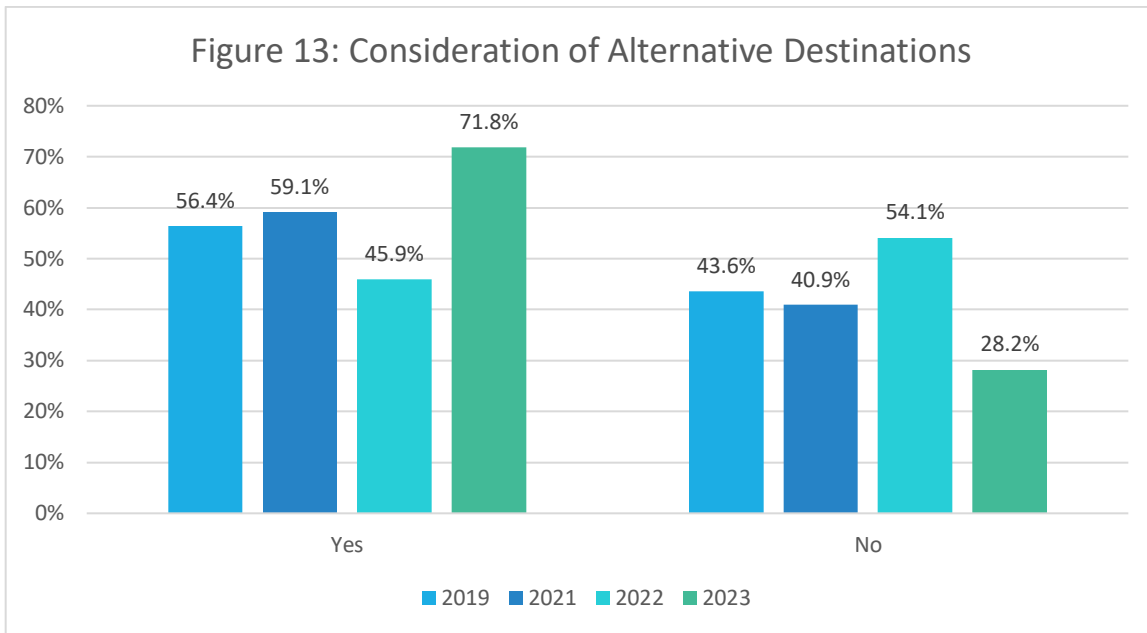
Did you visit any of the following cities while staying on Hilton Head Island?

	2021	2022	2023
Bluffton	37.0%	37.4%	66.2%
Tybee Island	7.3%	10.0%	51.1%
Savannah	29.3%	26.0%	16.0%
Charleston	15.7%	20.8%	10.5%
Beaufort	17.7%	23.2%	9.4%
Daufuskie Island	13.0%	17.1%	7.8%
Jacksonville	5.4%	11.3%	4.8%
Other	0.9%	0.5%	0.9%
I did not visit any other cities.	28.8%	20.1%	12.2%
N	995	1,477	1,115

TABLE 28: Other Cities Visited While on Hilton Head

TRAVEL PLANNING

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



	2019	2021	2022	2023
Yes	56.4%	59.1%	45.9%	71.8%
No	43.6%	40.9%	54.1%	28.2%
N	1,691	1,039	1,570	1,114

TABLE 29: Consideration of alternative destinations by year

Which of the following destinations did you consider visiting?

	2019	2021	2022	2023
Gulf Shores, AL	14.9%	19.8%	28.1%	18.3%
Alabama Golf Trail	1.6%	23.8%	31.9%	15.1%
Hawaiian Islands	4.8%	15.8%	24.4%	14.4%
Other	11.3%	13.2%	13.6%	12.4%
Outer Banks, NC	22.6%	28.9%	20.0%	12.3%
Caribbean	12.5%	23.1%	20.4%	12.1%
Marco Island/Naples, FL	12.1%	14.4%	18.2%	11.8%
The Florida Keys	19.4%	12.5%	8.5%	11.6%
Savannah, GA	33.9%	20.0%	19.3%	11.3%
Aspen, CO	2.0%	11.5%	10.1%	10.4%
Jekyll Island, GA	12.5%	13.2%	10.1%	10.4%
Telluride, CO	0.8%	7.8%	12.4%	10.3%
Orlando, FL	12.1%	19.3%	15.0%	9.5%
Sea Island, GA	4.8%	10.4%	12.5%	9.4%
Charleston, SC	45.2%	24.2%	19.3%	8.5%
Sandestin, FL	8.5%	9.2%	13.1%	8.4%
Reynolds Plantation, GA	1.2%	8.9%	10.7%	8.3%
St. Simons Island, GA	-	10.1%	10.4%	7.6%
Kiawah Island, SC	14.1%	15.5%	10.8%	7.5%
Sanibel Island, FL	13.7%	13.4%	13.8%	7.5%
Myrtle Beach, SC	37.5%	20.5%	12.9%	7.0%
Pinehurst, NC	3.2%	9.9%	12.2%	7.0%
Isle of Palms, SC	12.5%	18.1%	16.1%	6.9%
Sarasota, FL	6.9%	7.3%	9.6%	6.9%
Napa/Sonoma, CA	2.8%	8.5%	8.9%	6.4%
Tampa/St. Petersburg, FL	10.1%	9.6%	6.5%	6.3%
Tybee Island, GA	18.2%	14.6%	8.8%	6.3%
Ponte Vedre, FL	3.6%	8.5%	8.9%	5.5%
Santa Fe, NM	1.6%	2.8%	4.0%	5.4%
Bluffton, SC	0.0%	1.9%	4.4%	1.5%
Total	248	425	720	800

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	2022	2023
Wanted to visit a beach destination.	48.3%	49.7%	45.7%	32.6%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%	23.3%	23.4%
Had visited in the past and wanted to return.	80.3%	60.0%	42.5%	20.4%
Wanted to visit heritage attractions.	4.6%	7.8%	20.3%	18.2%
It was recommended by friends/family.	18.2%	24.1%	26.2%	12.2%
Wanted to visit someplace new.	8.6%	18.1%	17.8%	10.6%
Wanted to visit some place within driving distance.	22.7%	23.9%	19.4%	7.9%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%	10.1%	4.7%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%	9.9%	4.4%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%	9.3%	4.2%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%	6.3%	3.2%
Wanted to attend a sporting event.	1.7%	2.9%	4.3%	1.9%
Other	14.2%	8.5%	5.1%	2.9%
Total	953	1,039	1,570	1,288

TABLE 31: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

	2021	2022	2023
Very likely	74.3%	62.7%	44.4%
Likely	15.0%	22.5%	24.3%
Neutral	7.6%	9.5%	17.2%
Unlikely	1.9%	3.7%	13.4%
Very Unlikely	1.3%	1.7%	0.6%
Total	1,027	1,510	1,027

TABLE 32: Likelihood of Visiting Hilton Head Island Again

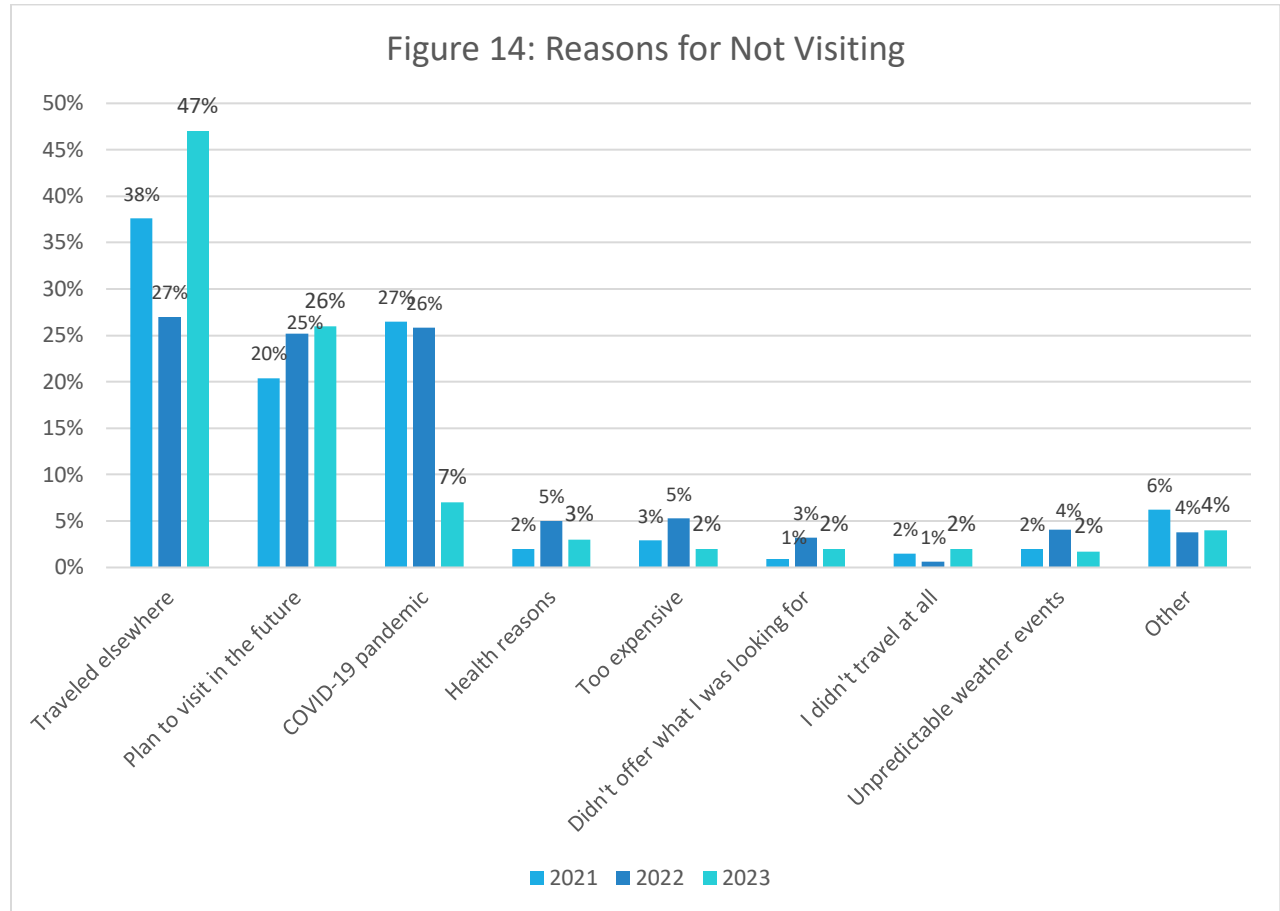
How likely are you to recommend visiting Hilton Head Island to a friend or family member?

	2021	2022	2023
Definitely Recommend	79.7%	70.2%	48.4%
Probably Recommend	14.9%	21.8%	22.8%
May or May Not Recommend	4.9%	6.2%	14.1%
Probably Not Recommend	0.5%	1.5%	14.4%
Definitely Not Recommend	0.0%	0.2%	0.2%
Total	1,034	1,522	1,039

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-Bluffton during the last 12 months?



	2021	2022	2023
Traveled elsewhere	37.6%	27.0%	47.0%
Plan to visit in the future	20.4%	25.2%	26.0%
COVID-19 pandemic	26.5%	25.8%	7.0%
Health reasons	2.0%	5.0%	3.0%
Too expensive	2.9%	5.3%	2.0%
Didn't offer what I was looking for	0.9%	3.2%	2.0%
I didn't travel at all	1.5%	0.6%	2.0%
Unpredictable weather events	2.0%	4.1%	1.7%
Other	6.2%	3.8%	4.0%
Total	860	341	100

TABLE 34: Reasons for not visiting

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

	2021	2022	2023
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%
Canada	1.4%	10.9%	16.0%
Europe	1.2%	7.3%	10.0%
Asia	0.5%	4.4%	8.0%
Latin America and Caribbean	2.1%	6.5%	6.0%
Australia/New Zealand	0.2%	3.2%	6.0%
Africa	0.3%	1.2%	1.0%
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%
Total	860	341	100

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

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

	2021	2022	2023
Never visited	38.9%	42.9%	33.7%
1	18.6%	14.0%	9.5%
2 to 5	30.2%	36.4%	40.8%
6 to 10	9.8%	5.0%	13.6%
11 to 20	1.9%	0.9%	1.2%
21 or more	0.9%	0.5%	1.2%
Total	860	341	169

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

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

	2021	2022	2023
Yes, within one year	49.2%	50.1%	48.8%
Yes, but not sure when	42.5%	49.0%	47.0%
No	8.3%	0.9%	4.2%
Total	859	341	168

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

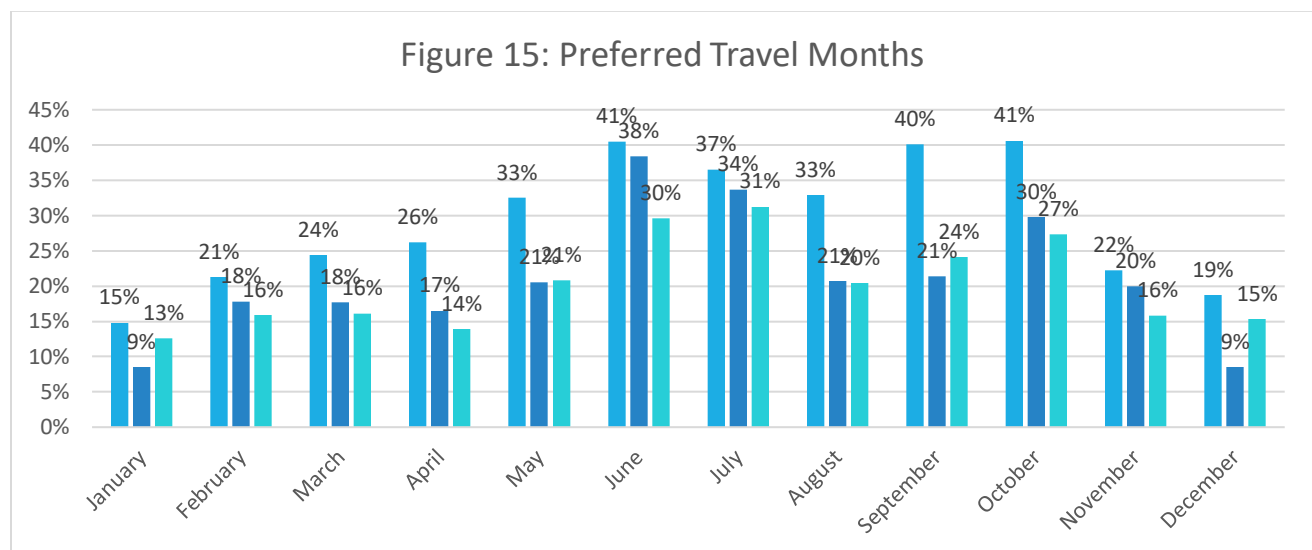
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2021	2022	2023
0 to 1	15.3%	10.0%	7.3%
2 to 4	55.1%	47.3%	50.6%
5 to 7	19.2%	29.9%	23.4%
8 to 10	6.3%	8.2%	15.8%
More than 10	4.1%	4.7%	2.9%
Total	1,042	984	1,625

TABLE 38: Frequency of Leisure/Vacation Trips

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



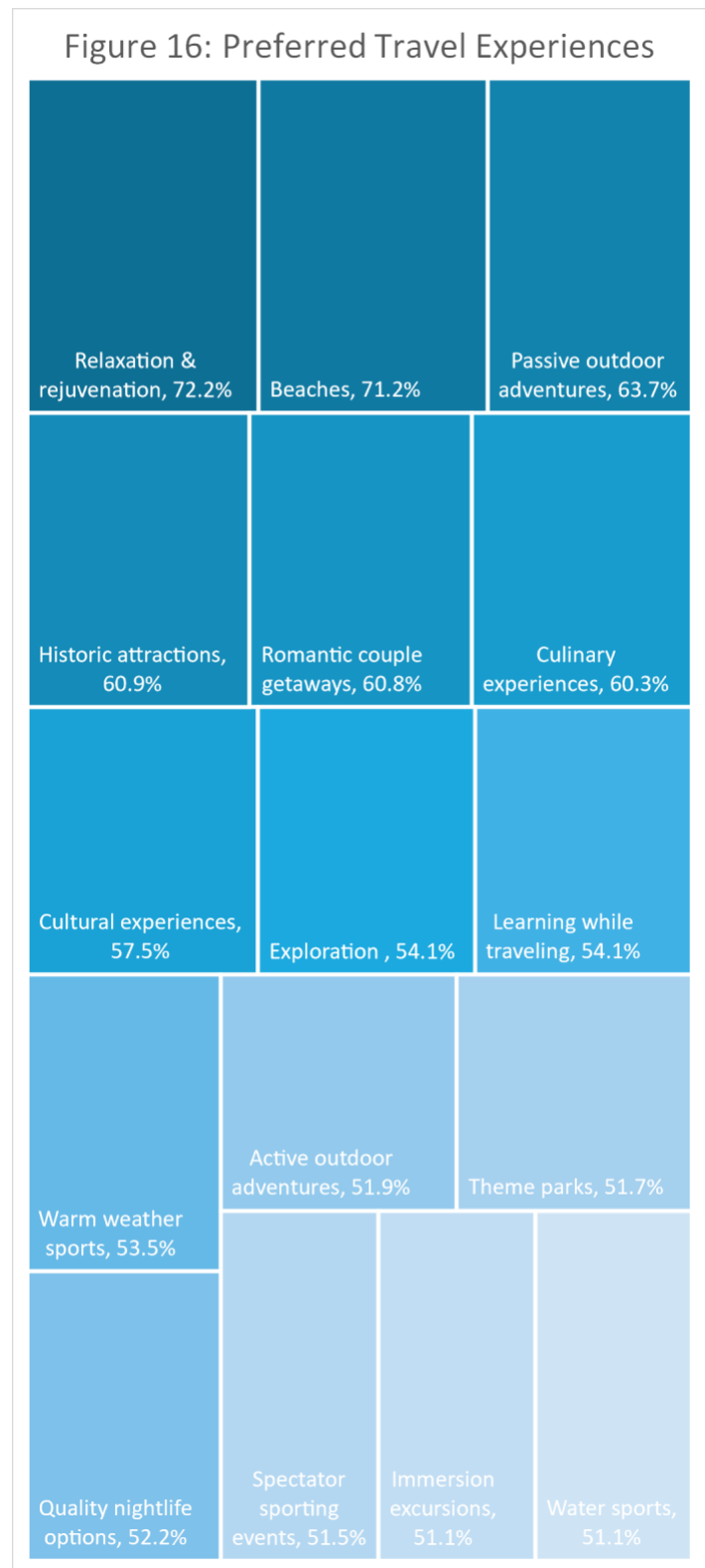
	2021	2022	2023
January	14.8%	8.5%	12.6%
February	21.3%	17.8%	15.9%
March	24.4%	17.7%	16.1%
April	26.2%	16.5%	13.9%
May	32.5%	20.5%	20.8%
June	40.5%	38.4%	29.6%
July	36.5%	33.7%	31.3%
August	32.9%	20.7%	20.4%
September	40.1%	21.4%	24.1%
October	40.6%	29.8%	27.3%
November	22.2%	20.0%	15.8%
December	18.7%	8.5%	15.3%
Total	1,042	984	1,625

TABLE 39: Preferred Travel Months

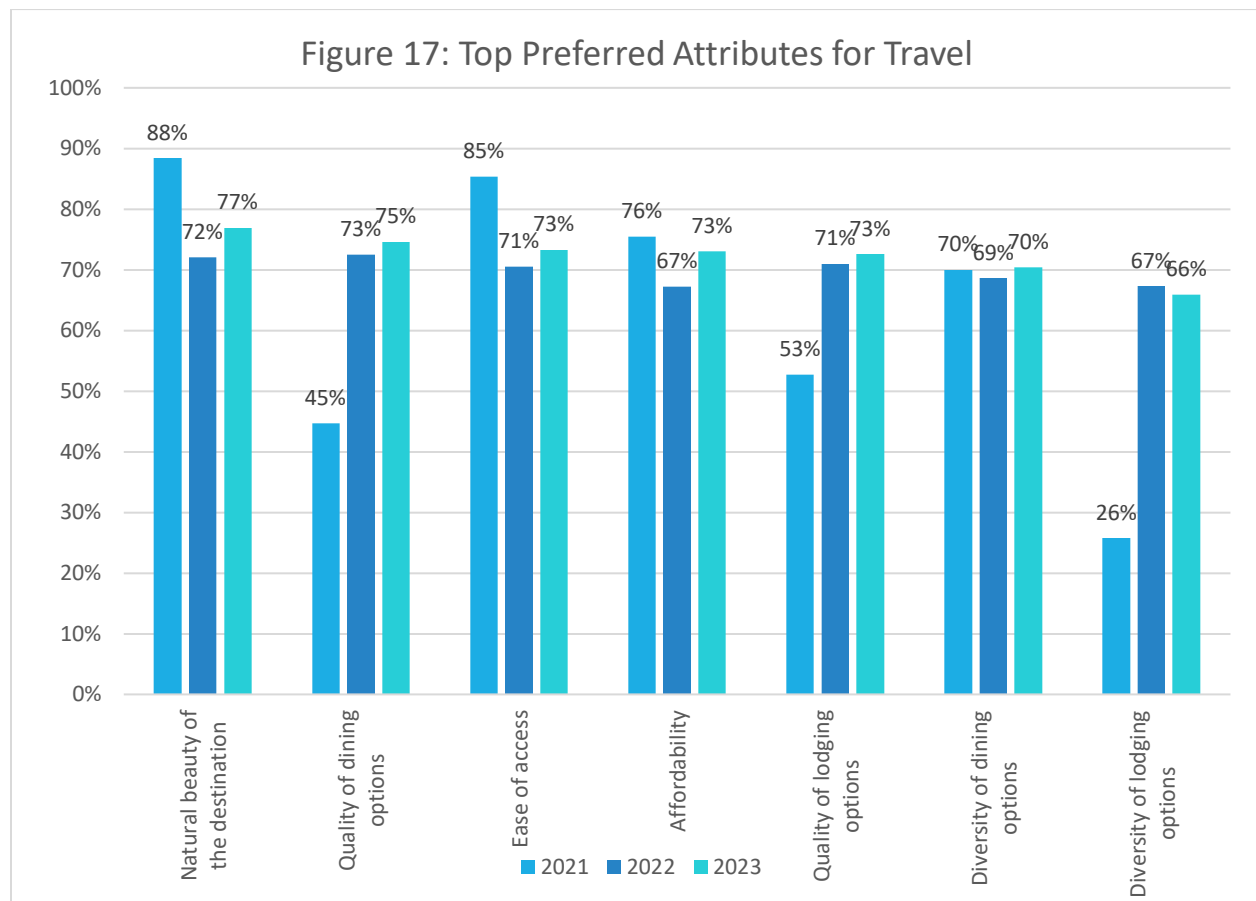
To what extent do the following types of vacations/leisure trips and/or travel experiences appeal to you?

“Appealing” + “Very Appealing”	2021	2022	2023
Relaxation & rejuvenation	85.4%	66.9%	72.2%
Beaches	88.4%	65.1%	71.2%
Passive outdoor adventures	72.6%	64.4%	63.7%
Historic attractions	75.5%	64.4%	60.9%
Romantic couple getaways	70.0%	65.0%	60.8%
Culinary experiences	70.1%	63.7%	60.3%
Cultural experiences	70.7%	62.9%	57.5%
Exploration	57.5%	59.8%	54.1%
Learning while traveling	60.9%	56.3%	54.1%
Warm weather sports	52.7%	61.2%	53.5%
Quality nightlife options	52.6%	60.3%	52.2%
Active outdoor adventures	46.8%	59.6%	51.9%
Theme parks	44.7%	58.7%	51.7%
Spectator sporting events	49.2%	57.0%	51.5%
Immersion excursions	49.6%	57.4%	51.1%
Water sports	48.8%	60.4%	51.1%
Luxury camping	39.9%	55.0%	50.7%
Performing/cultural arts getaways	51.2%	58.6%	50.5%
Art	49.8%	57.1%	49.2%
Urban getaway	48.4%	58.5%	48.0%
Medical/wellness	40.8%	55.5%	47.9%
Waterparks	40.3%	54.4%	47.9%
Winter sports	30.2%	53.9%	42.5%
Golf getaways	37.4%	50.6%	41.9%
Voluntourism	29.5%	49.9%	40.8%
Tennis getaways	25.8%	48.5%	36.2%
Total	949	1,005	1,625

TABLE 40: Preferred Vacation/Leisure Travel Experiences



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



“Important” + “Very Important”	2021	2022	2023
Natural beauty of the destination	88.4%	72.1%	76.9%
Quality of dining options	44.7%	72.5%	74.6%
Ease of access	85.4%	70.5%	73.3%
Affordability	75.5%	67.2%	73.0%
Quality of lodging options	52.7%	71.0%	72.6%
Diversity of dining options	70.0%	68.6%	70.4%
Diversity of lodging options	25.8%	67.3%	65.9%
Low traffic congestion	60.9%	64.8%	63.6%
Travel distance	70.7%	63.1%	63.3%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%
Activities like events/festivals	49.6%	64.2%	55.4%
Nightlife activity options	48.4%	61.4%	53.2%
Medical/wellness	37.4%	60.4%	52.6%
Public transportation	57.5%	57.0%	49.2%
Total	949	1,005	

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.	10.6%	21.7%	29.9%	26.4%	11.3%
I try to support the local economy of places that I visit.	22.9%	42.8%	19.4%	12.3%	2.5%
N 973					

TABLE 42: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent
Los Angeles-Long Beach-Anaheim, CA	106	9.3%
New York-Newark-Jersey City, NY-NJ	79	6.9%
Atlanta-Sandy Springs-Roswell, GA	44	3.9%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	41	3.6%
San Francisco-Oakland-Fremont, CA	39	3.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	38	3.3%
Chicago-Naperville-Elgin, IL-IN	34	3.0%
Pittsburgh, PA	33	2.9%
Charlotte-Concord-Gastonia, NC-SC	23	2.0%
Columbus, OH	23	2.0%
Detroit-Warren-Dearborn, MI	20	1.8%
Charleston-North Charleston, SC	17	1.5%
Louisville/Jefferson County, KY-IN	17	1.5%
Rural OH	16	1.4%
Boston-Cambridge-Newton, MA-NH	15	1.3%
Cincinnati, OH-KY-IN	15	1.3%
Houston-Pasadena-The Woodlands, TX	15	1.3%
Kansas City, MO-KS	15	1.3%
Albany-Schenectady-Troy, NY	14	1.2%
Baltimore-Columbia-Towson, MD	14	1.2%
Austin-Round Rock-San Marcos, TX	13	1.1%
Riverside-San Bernardino-Ontario, CA	13	1.1%
San Diego-Chula Vista-Carlsbad, CA	13	1.1%
Jacksonville, FL	12	1.1%
Wisconsin Rapids-Marshfield, WI	12	1.1%
Greenville-Anderson-Greer, SC	11	1.0%
St. Louis, MO-IL	11	1.0%
Akron, OH	10	0.9%
Columbia, SC	10	0.9%
Rural TX	10	0.9%
Indianapolis-Carmel-Greenwood, IN	9	0.8%
La Crosse-Onalaska, WI-MN	9	0.8%
Rural KY	9	0.8%
San Jose-Sunnyvale-Santa Clara, CA	9	0.8%
Miami-Fort Lauderdale-West Palm Beach, FL	8	0.7%
Minneapolis-St. Paul-Bloomington, MN-WI	8	0.7%
Allentown-Bethlehem-Easton, PA-NJ	7	0.6%
Buffalo-Cheektowaga, NY	7	0.6%
Cape Coral-Fort Myers, FL	7	0.6%
Clarksburg, WV	7	0.6%
Denver-Aurora-Centennial, CO	7	0.6%
Fayetteville-Springdale-Rogers, AR	7	0.6%
Milwaukee-Waukesha, WI	7	0.6%
Orlando-Kissimmee-Sanford, FL	7	0.6%
Rochester, NY	7	0.6%
San Antonio-New Braunfels, TX	7	0.6%

MSA	Count	Percent
Dayton-Kettering-Beavercreek, OH	6	0.5%
Fresno, CA	6	0.5%
Jackson, MS	6	0.5%
Johnstown, PA	6	0.5%
Lancaster, PA	6	0.5%
Las Vegas-Henderson-North Las Vegas, NV	6	0.5%
Little Rock-North Little Rock-Conway, AR	6	0.5%
Sacramento-Roseville-Folsom, CA	6	0.5%
Beaumont-Port Arthur, TX	5	0.4%
Birmingham, AL	5	0.4%
Fayetteville, NC	5	0.4%
Killeen-Temple, TX	5	0.4%
Lansing-East Lansing, MI	5	0.4%
Memphis, TN-MS-AR	5	0.4%
Phoenix-Mesa-Chandler, AZ	5	0.4%
Rural IA	5	0.4%
Rural ME	5	0.4%
Rural NY	5	0.4%
Savannah, GA	5	0.4%
Seattle-Tacoma-Bellevue, WA	5	0.4%
Toledo, OH	5	0.4%
Anchorage, AK	4	0.4%
Boise City, ID	4	0.4%
Brainerd, MN	4	0.4%
Calhoun, GA	4	0.4%
Findlay, OH	4	0.4%
Lafayette-West Lafayette, IN	4	0.4%
Ocala, FL	4	0.4%
Providence-Warwick, RI-MA	4	0.4%
Richmond, VA	4	0.4%
Rural CO	4	0.4%
Rural ND	4	0.4%
Asheville, NC	3	0.3%
Athens-Clarke County, GA	3	0.3%
Atlantic City-Hammonton, NJ	3	0.3%
Deltona-Daytona Beach-Ormond Beach, FL	3	0.3%
Erie, PA	3	0.3%
Greensboro-High Point, NC	3	0.3%
Gulfport-Biloxi, MS	3	0.3%
Omaha, NE-IA	3	0.3%
Panama City-Panama City Beach, FL	3	0.3%
Roanoke, VA	3	0.3%
Rockingham, NC	3	0.3%
Rural AK	3	0.3%
Rural FL	3	0.3%
Rural KS	3	0.3%
Salinas, CA	3	0.3%
Stevens Point-Plover, WI	3	0.3%
Sumter, SC	3	0.3%

MSA	Count	Percent
Tucson, AZ	3	0.3%
Virginia Beach-Chesapeake-Norfolk, VA-NC	3	0.3%
Warner Robins, GA	3	0.3%
Albany, GA	2	0.2%
Augusta-Waterville, ME	2	0.2%
Chambersburg, PA	2	0.2%
Ellensburg, WA	2	0.2%
Fergus Falls, MN	2	0.2%
Keene, NH	2	0.2%
Kendallville, IN	2	0.2%
Maryville, MO	2	0.2%
Merced, CA	2	0.2%
Mobile, AL	2	0.2%
Modesto, CA	2	0.2%
Natchitoches, LA	2	0.2%
Pensacola-Ferry Pass-Brent, FL	2	0.2%
Port St. Lucie, FL	2	0.2%
Raleigh-Cary, NC	2	0.2%
Redding, CA	2	0.2%
Reno, NV	2	0.2%
Rural LA	2	0.2%
Rural MI	2	0.2%
Seneca, SC	2	0.2%
South Bend-Mishawaka, IN-MI	2	0.2%
Tallahassee, FL	2	0.2%
Terre Haute, IN	2	0.2%
Texarkana, TX-AR	2	0.2%
Torrington, CT	2	0.2%
Tulahoma-Manchester, TN	2	0.2%
Victoria, TX	2	0.2%
Cambridge, OH	1	0.1%
Decatur, IN	1	0.1%
El Paso, TX	1	0.1%
Jamestown-Dunkirk, NY	1	0.1%
Lake Havasu City-Kingman, AZ	1	0.1%
Las Vegas, NM	1	0.1%
Liberal, KS	1	0.1%
Manhattan, KS	1	0.1%
New Orleans-Metairie, LA	1	0.1%
Pullman, WA	1	0.1%
Russellville, AR	1	0.1%
Rutland, VT	1	0.1%
Sebastian-Vero Beach-West Vero Corridor, FL	1	0.1%
St. Cloud, MN	1	0.1%
Thomasville, GA	1	0.1%



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