Bluffton Visitor Profile Survey

2024

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EXECUTIVE SUMMARY

SAMPLE DEMOGRAPHICS

Millennials (29-44 years old) represented 39.8% of the respondents, followed by older Gen Z (19-28 years old) (33.6%), Baby Boomers (61+ years old) (14.6%), and then Gen X (45-60 years old) (11.5%). Over 54% of those surveyed had a Bachelor's degree or higher, and more than 62% had an annual household income of $75,000 or more. Also, nearly 73% of the respondents were married.

POINT OF ORIGIN

The respondents resided in 268 geographical areas / MSAs (Metropolitan Statistical Areas) throughout the U.S., stretching from the east coast to the west coast. More respondents resided in California than any other state (8.6%). Second was New York (8.0%), followed then by Pennsylvania (5.4%), Kentucky (4.7%), Ohio (4.6%), and Washington (4.3%). In-state visitors did not comprise a significant portion of the respondents (8.1%).

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ; Los Angeles-Long Beach-Anaheim, CA; Seattle-Tacoma-Bellevue, WA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Lexington-Fayette, KY; Rochester, NY; Atlanta-Sandy Springs-Roswell, GA; Charleston-North Charleston, SC; Chicago-Naperville-Elgin, IL-IN; and Pittsburgh, PA.

Canada was the top international origin market amongst respondents (73.7%), followed by Europe (10.5%) and the British Virgin Islands (10.5%).

THOSE WHO TRAVELED TO BLUFFTON

The top reasons for choosing Bluffton as a destination included visiting beaches, spending time with family, relaxation, nature-based activities, visiting heritage attractions/museums/historic tours, shopping, and business. Other popular motivations included festivals, boating/sailing/kayaking, biking, and golf. The activities in which visitors actually participated are similar to the previously mentioned activities, and also include culinary, music or theatrical performances, and water excursions. Amongst Bluffton's overnight visitors, 72.2% were first-time visitors, suggesting that the destination continues to appeal to new visitors.

Trip Characteristics

The average group size of those surveyed was 3.1 for overnight visitors and 2.8 for day trip visitors. The main mode of transportation to town was personal/family car for both overnight and day trip visitors (43.5% overnight, 40.0% day trip). About 51% of overnight visitors flew to Bluffton via commercial flights, with just over half of them (50.5%) landing at the Savannah/Hilton Head Island International Airport.

The average length of stay for those overnight visitors surveyed was approximately 4.6 nights. Hotels were the most popular choice of accommodation for overnight visitors (48.5%), followed by home/villa rentals (19.5%), resorts (15.5%), and staying with friends/relatives (14.5%).

TRAVEL PLANNING

VRBO was the most popular online booking platform for villas/homes (28.9%), followed by local vacation rental companies (26.3%) and Airbnb (18.4%). The top five other destinations visitors considered before choosing Bluffton were the Hawaiian Islands; Gulf Shores, AL; Ponte Verde, FL; Isle of Palms, SC; Alabama Golf Trail; and the Caribbean.

Top reasons for choosing to visit Bluffton were word-of-mouth recommendation (41.3%), wanting to visit a beach destination (33.5%), wanting to visit nature-based attractions (32.2%), and wanting to visit someplace new (23.9%).

Of those surveyed, 82.1% indicated an intention to return to visit Bluffton, 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=246), 29.7% had never visited the Hilton Head Island / Bluffton area before, and 61.8% had visited one to five times before.

Of those non-visitors, 38.6% traveled elsewhere, 34.2% plan to visit in the future, 11.4% mentioned health reasons, 5.1% were hesitant because of unpredictable weather events, 3.2% did not find what they were looking for, and 0.6% did not travel at all. Of those who did not visit the Hilton Head Island / Bluffton area, alternative destinations in the Southeast (34.4%) and Northeast (33.1%) were the most popular. Nonetheless, 36.7% 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 (57.8%) 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: beaches (87.1%), relaxation & rejuvenation (85.3%), passive outdoor adventures (76.1%), romantic couple getaways (74.7%), and historic attractions (73.6%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (92.8%), quality of dining options (85.8%), ease of access (85.5%), quality of lodging options (84.9%), diversity of dining options (83.2%), and affordability (80.6%).

METHODOLOGY

SURVEY IMPLEMENTATION

The 2024 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2024 and January 2025, 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 1,040 completed surveys were collected. This report is based largely on the 230 respondents who visited Bluffton as an overnight or day trip, along with 246 individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton. The remaining 574 responses were individuals who only visited Hilton Head Island and are covered in a separate report.

This report presents the results of the present study, together with comparative results from the last time this study was completed, examining visitation in 2021, 2022, and 2023.

The table below shows the visitor estimates for Bluffton by segment for 2021, 2022, 2023, and 2024.

Visitor Segment	2021	2022	2023	2024
Non-paying Guests	172,349	154,478	174,291	173,167
Daytrippers	309,137	277,083	312,621	310,606
Total Visitors	481,486	431,561	486,912	483,773

Table 1: Visitor Estimates 2021-2024

SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

Gender	2022	2023	2024
Female	38.1%	52.0%	44.0%
Male	61.9%	47.5%	56.0%
Self-identify	-	0.5%	-
Marital Status			
Married	69.1%	76.8%	76.3%
Single	14.4%	12.4%	12.3%
Divorced	7.7%	4.5%	6.6%
Widowed	7.2%	4.8%	3.3%
Separated	1.6%	1.5%	1.4%
Education (highest level completed)			
Grade School	0.8%	0.5%	-
High School	3.6%	8.4%	4.8%
Some College	26.7%	23.8%	22.1%
Associates Degree (2 years)	15.8%	16.2%	13.0%
Bachelor's Degree (4 years)	33.9%	32.5%	36.5%
Graduate Degree (Post degree/MA)	19.1%	18.6%	23.6%
Age			
19 years or younger	0.6%	0.3%	1.0%
20 to 29 years	38.3%	23.8%	5.8%
30 to 39 years	44.4%	36.8%	30.3%
40 to 49 years	10.7%	12.2%	19.2%
50 to 59 years	1.8%	10.9%	19.7%
60 to 69 years	2.9%	9.8%	4.3%
70 years and over	1.1%	6.0%	1.9%
Prefer not to say	0.2%	0.3%	-
Household Income			
Under $24,999	0.8%	1.4%	3.6%
$25,000-$34,999	5.6%	5.4%	8.7%
$35,000-$49,999	10.3%	11.0%	6.2%
$50,000-$74,999	12.6%	14.7%	11.8%
$75,000-$99,999	18.8%	20.1%	25.1%
$100,000-$149,999	18.4%	18.1%	25.1%
$150,000-$199,999	19.1%	14.7%	10.8%
$200,000-$249,999	7.6%	10.8%	3.1%
$250,000 or more	6.8%	3.7%	5.6%
N	1,005	422	243

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	73	7.1%
2	Los Angeles-Long Beach-Anaheim, CA	42	4.1%
3	Seattle-Tacoma-Bellevue, WA	38	3.7%
4	Washington-Arlington-Alexandria, DC-VA-MD-WV	33	3.2%
5	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	28	2.7%
6	Lexington-Fayette, KY	27	2.6%
7	Rochester, NY	25	2.4%
8	Atlanta-Sandy Springs-Roswell, GA	22	2.2%
9	Charleston-North Charleston, SC	20	2.0%
10	Chicago-Naperville-Elgin, IL-IN	19	1.9%
11	Pittsburgh, PA	19	1.9%
12	Charlotte-Concord-Gastonia, NC-SC	17	1.7%
13	Dallas-Fort Worth-Arlington, TX	16	1.6%
14	Hilton Head Island-Bluffton-Port Royal, SC	14	1.4%
15	Baltimore-Columbia-Towson, MD	13	1.3%
16	Las Vegas-Henderson-North Las Vegas, NV	13	1.3%
17	Myrtle Beach-Conway-North Myrtle Beach, SC	13	1.3%
18	Louisville/Jefferson County, KY-IN	12	1.2%
19	Cincinnati, OH-KY-IN	11	1.1%
20	Phoenix-Mesa-Chandler, AZ	11	1.1%
21	Boston-Cambridge-Newton, MA-NH	10	1.0%
22	Miami-Fort Lauderdale-West Palm Beach, FL	10	1.0%
23	Rural OH	10	1.0%
24	Columbia, SC	9	0.9%
25	Detroit-Warren-Dearborn, MI	9	0.9%
26	Minneapolis-St. Paul-Bloomington, MN-WI	9	0.9%
27	Columbus, OH	8	0.8%
28	Birmingham, AL	7	0.7%
29	Fresno, CA	7	0.7%
30	Greenville-Anderson-Greer, SC	7	0.7%
	Other	469	45.9%
	Total	1,040	

Table 3: ZIP Code Analysis – Top 30 MSAs

International Markets

Figure 1: International Markets by Year
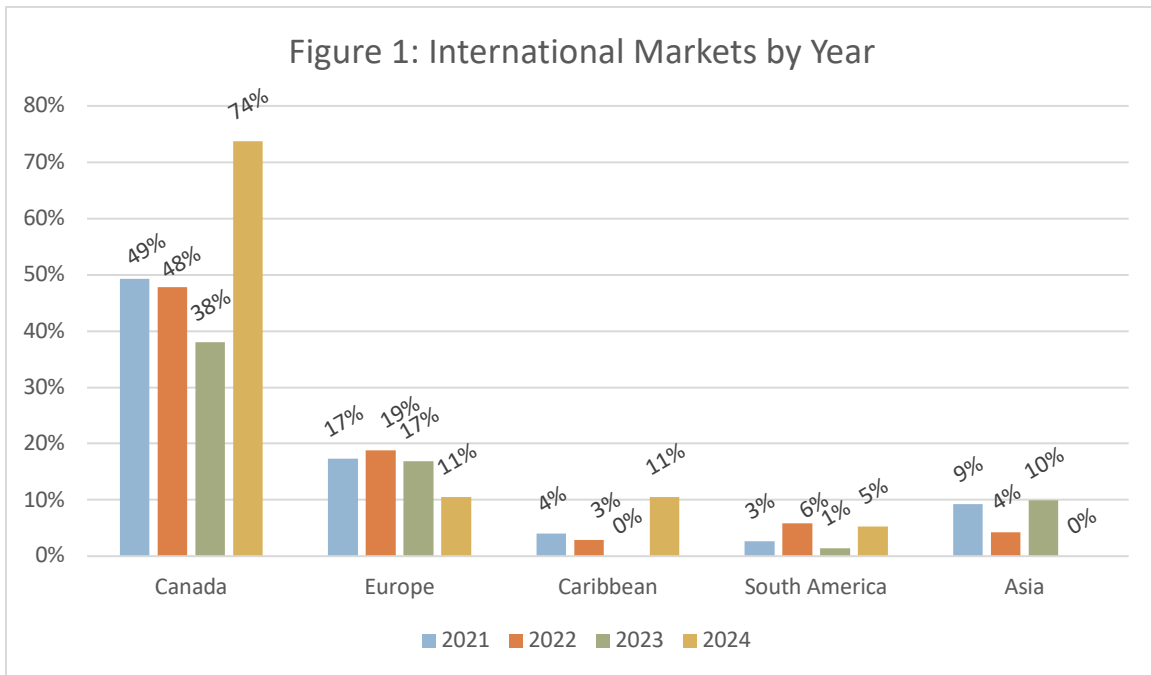
	2021	2022	2023	2024
Canada	49.3%	47.8%	38.0%	73.7%
Europe	17.3%	18.8%	16.9%	10.5%
Caribbean	4.0%	2.9%	-	10.5%
South America	2.7%	5.8%	1.4%	5.3%
Asia	9.3%	4.3%	9.9%	-
Australia/Oceania	1.3%	5.8%	5.6%	-
Africa	6.7%	7.2%	1.4%	-
Antarctica	2.7%	-	-	-
Central America	1.3%	-	-	-
Middle East	5.3%	7.2%	26.8%	
N	75	69	71	19

Table 4: International Markets

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

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

Figure 2: Travel Frequency by Year
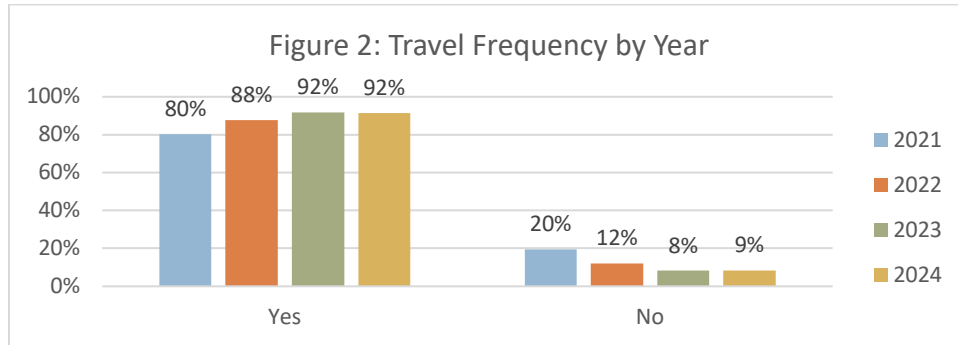
	2021	2022	2023	2024
Yes	80.4%	87.8%	91.8%	91.5%
No	19.6%	12.2%	8.2%	8.5%
N	2,084	2,918	1,710	1,040

TABLE 5: Travel Frequency by Year

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

Figure 3: Hilton Head Island Area Visitation by Year
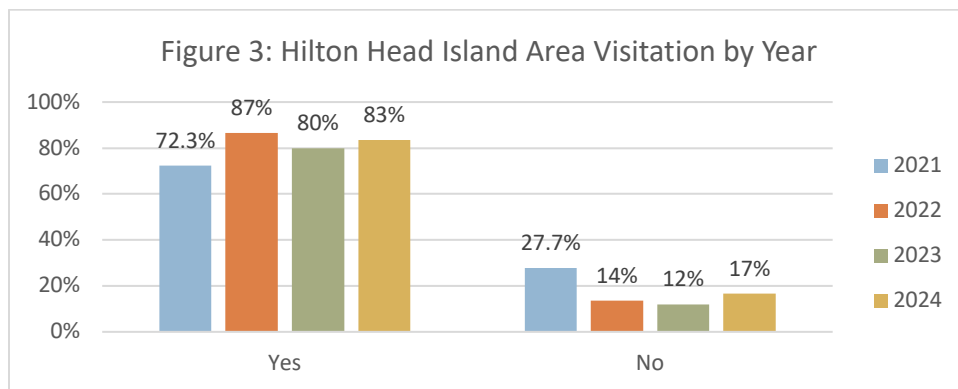
	2021	2022	2023	2024
Yes	72.3%	86.5%	79.8%	83.4%
No	27.7%	13.5%	12.0%	16.6%
N	1,675	2,547	1,570	952

TABLE 6: Bluffton / Hilton Head Island Visitation by Year

BLUFFTON VISITORS

Was that your first time visiting in Bluffton?
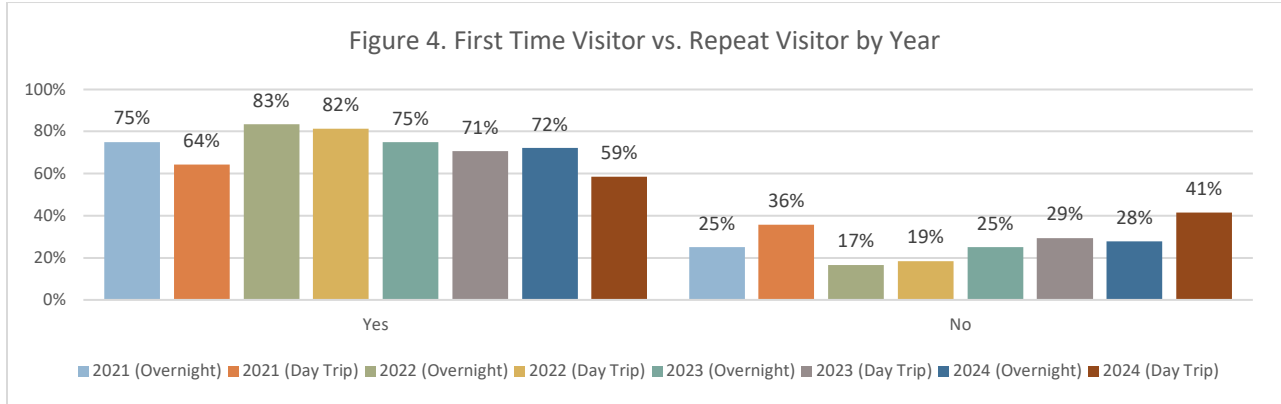
Figure 4. First Time Visitor vs. Repeat Visitor by Year

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Yes	75.0%	64.3%	83.4%	81.5%	74.9%	70.6%	72.2%	58.6%
No	25.0%	35.7%	16.6%	18.5%	25.1%	29.4%	27.8%	41.4%
N	164	28	603	54	211	34	198	29

TABLE 7: First Time Visitor vs. Repeat Visitor

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

Figure 5: Reservation Lead Time
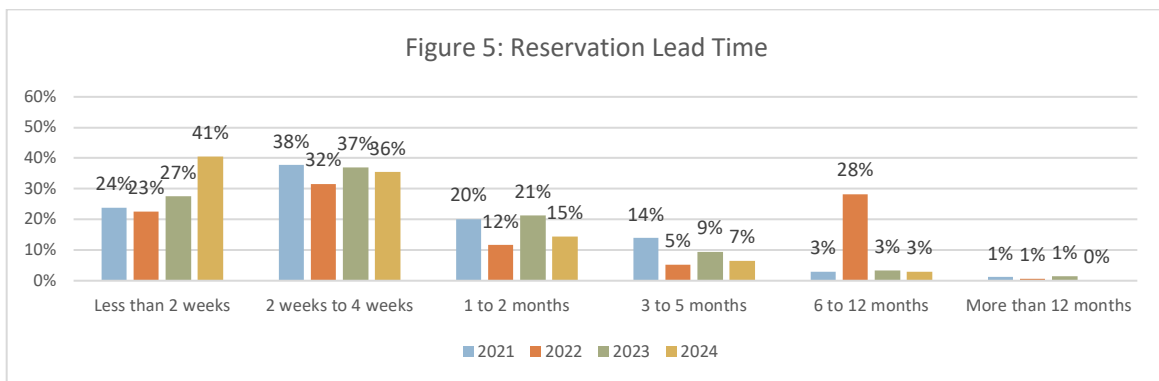
	2021	2022	2023	2024
Less than 2 weeks	23.8%	22.5%	27.5%	40.5%
2 weeks to 4 weeks	37.8%	31.6%	37.0%	35.5%
1 to 2 months	20.1%	11.6%	21.3%	14.5%
3 to 5 months	14.0%	5.3%	9.5%	6.5%
6 to 12 months	3.0%	28.3%	3.3%	3.0%
More than 12 months	1.2%	0.7%	1.4%	-
N	164	604	211	200

TABLE 8: Reservation Lead Time

When did you make your most recent trip to Bluffton?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
January	2.0%	-	2.4%	2.1%	8.4%	3.0%	2.1%	-
February	12.0%	10.0%	6.3%	6.4%	6.9%	-	9.4%	10.0%
March	5.3%	15.0%	8.8%	8.5%	7.9%	3.0%	5.7%	6.7%
April	8.0%	-	12.3%	19.1%	15.3%	15.2%	11.5%	13.3%
May	5.3%	5.0%	6.4%	14.9%	11.9%	12.1%	14.1%	20.0%
June	15.3%	30.0%	11.4%	12.8%	14.4%	18.2%	13.5%	10.0%
July	15.3%	30.0%	9.4%	12.8%	6.4%	12.1%	10.9%	10.0%
August	6.7%	-	12.5%	17.0%	5.4%	12.1%	9.9%	6.7%
September	8.0%	5.0%	10.5%	4.3%	10.9%	6.1%	8.9%	6.7%
October	8.7%	5.0%	9.2%	-	6.4%	9.1%	8.3%	13.3%
November	7.3%	-	6.6%	2.1%	3.5%	-	3.1%	3.3%
December	6.0%	-	4.1%	-	2.5%	9.1%	2.6%	-
N	150	20	543	47	202	33	192	30

TABLE 9: Visitation by Month

Figure 6: Visitation by Month
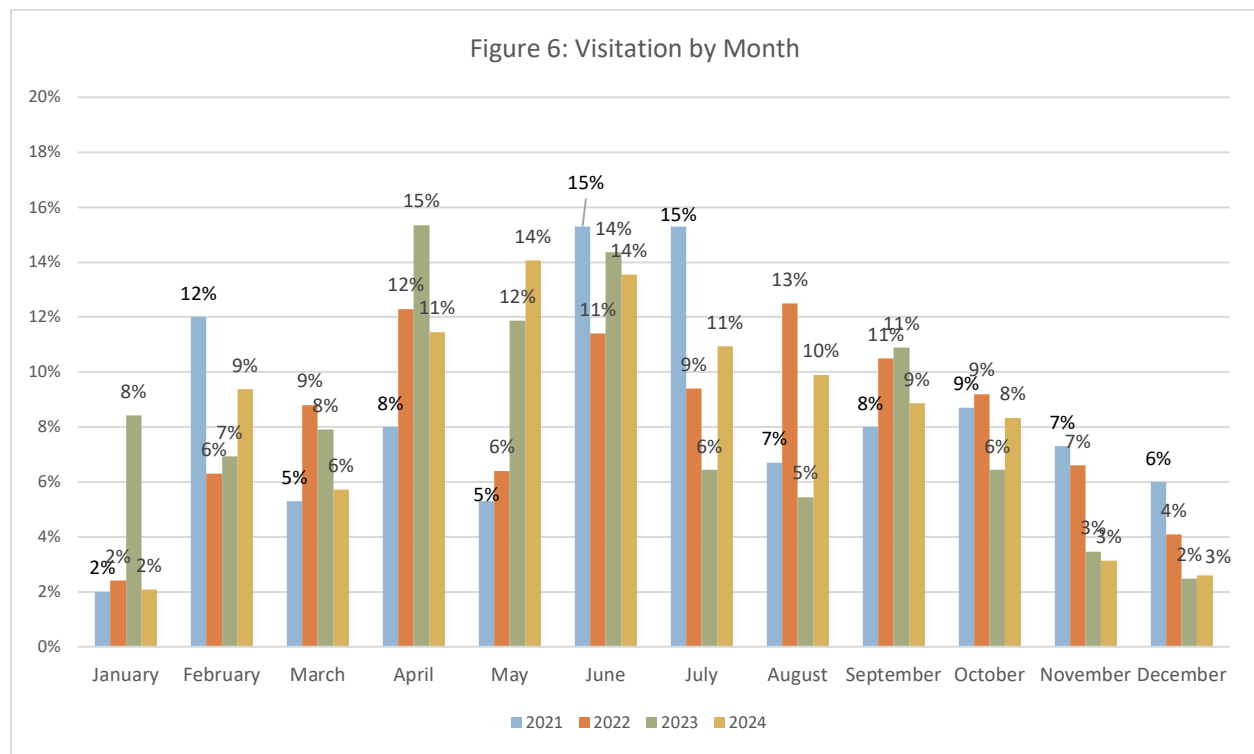
Approximately how many nights was your trip to Bluffton?

Figure 7: Length of Stay
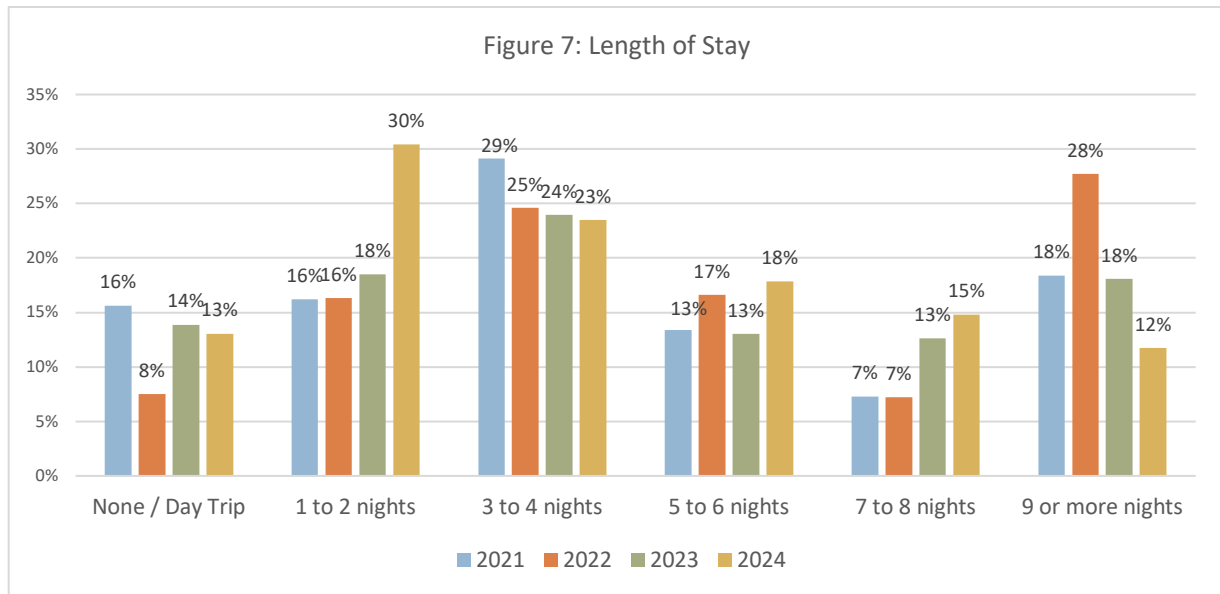
	2021	2022	2023	2024
None/day trip only	15.6%	7.5%	13.9%	13.0%
1 night	3.4%	3.4%	3.4%	3.5%
2 nights	12.8%	12.9%	15.1%	15.7%
3 nights	18.4%	14.2%	15.5%	14.8%
4 nights	10.6%	10.4%	8.4%	8.7%
5 nights	13.4%	9.9%	10.1%	11.7%
6 nights	-	6.7%	2.9%	6.1%
7 nights	4.5%	4.6%	6.3%	10.0%
8 nights	2.8%	2.6%	6.3%	4.8%
9 nights	2.2%	2.1%	1.3%	1.7%
10 nights	5.6%	4.2%	4.2%	3.5%
11 nights	1.7%	2.2%	-	3.0%
12 nights	1.7%	1.6%	2.5%	2.6%
13 nights	1.7%	1.1%	1.3%	-
14 nights	1.7%	3.8%	1.7%	-
15 nights	1.1%	2.2%	1.7%	-
More than 15 nights	2.8%	10.5%	5.5%	0.9%
N	179	626	238	230

TABLE 10: Length of Stay

Please indicate how many people (including yourself) were in your travel party.
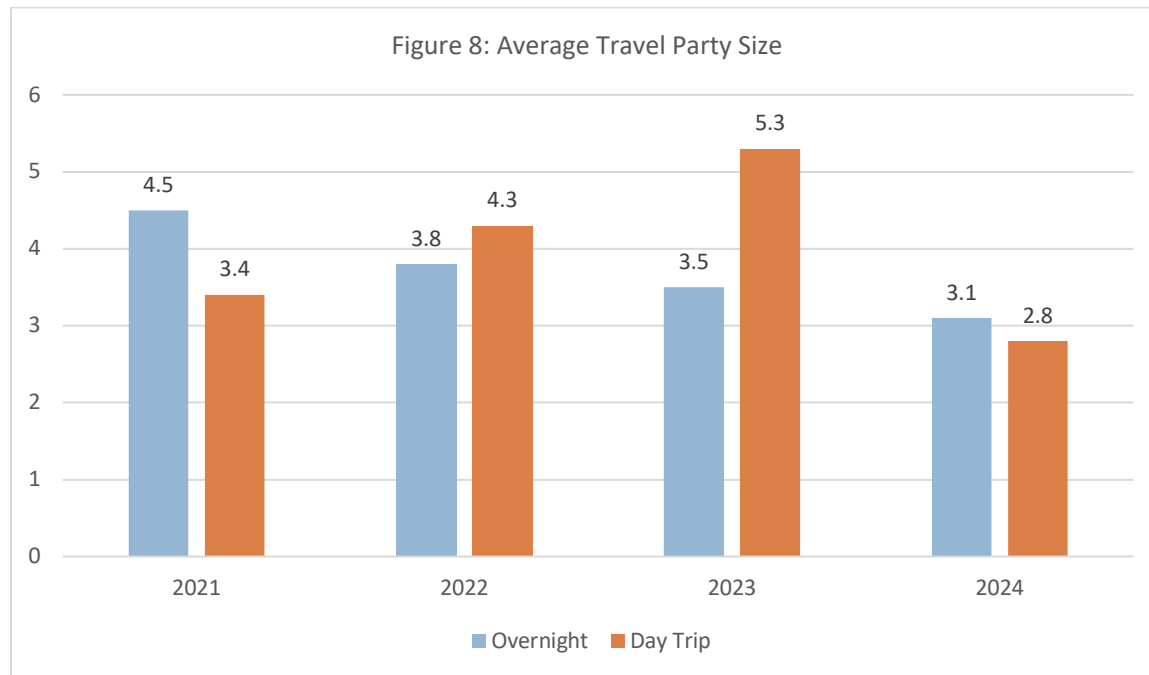
Figure 8: Average Travel Party Size

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Average	4.5	3.4	3.8	4.3	3.5	5.3	3.1	2.8
N	151	21	543	47	205	33	200	30

TABLE 11: Travel Party Size

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

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	31.8%	2.0%	1.3%	0.7%	0.2%	-	0.4%
	18-24	18.1%	9.4%	6.4%	0.5%	0.5%	0.4%	0.9%
	25-34	25.2%	4.7%	4.9%	0.4%	0.4%	0.4%	0.4%
	35-44	33.0%	1.3%	1.6%	-	-	0.2%	0.2%
	45-54	32.5%	1.1%	2.4%	0.2%	-	0.2%	-
	55-64	33.0%	1.8%	1.5%	-	-	-	-
	65+	29.9%	3.1%	2.5%	0.2%	-	-	0.5%
Day Trip	Under 18	113.0%	8.7%	-	4.3%	4.3%	-	-
	18-24	78.3%	13.0%	30.4%	-	4.3%	4.3%	-
	25-34	108.7%	8.7%	8.7%	4.3%	-	-	-
	35-44	117.4%	8.7%	4.3%	-	-	-	-
	45-54	117.4%	-	8.7%	4.3%	-	-	-
	55-64	104.3%	8.7%	4.3%	4.3%	4.3%	4.3%	-
	65+	95.7%	17.4%	17.4%	-	-	-	-

TABLE 12: Travel Party Age Mix

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

Figure 9: Trip Purpose of Overnight Visitors
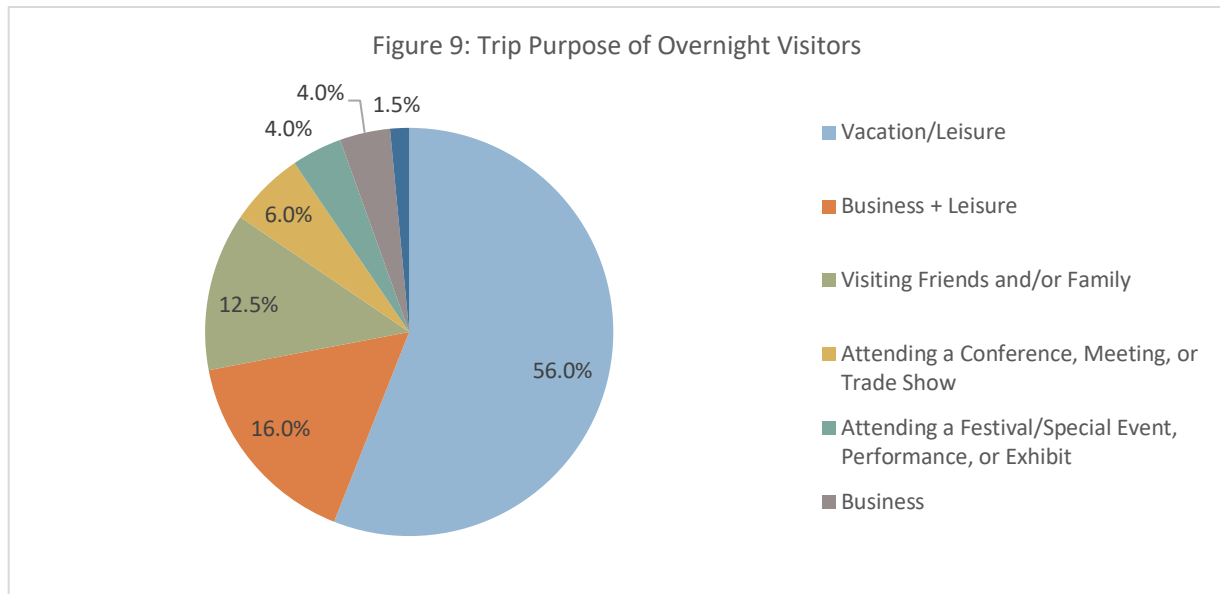
	2021	2022	2023	2024
Vacation/Leisure	46.3%	42.1%	38.6%	56.0%
Business + Leisure	22.1%	20.4%	24.7%	16.0%
Visiting Friends and/or Family	16.8%	9.7%	10.7%	12.5%
Attending a Conference, Meeting, or Trade Show	9.4%	10.2%	8.8%	6.0%
Attending a Festival/Special Event, Performance, or Exhibit	3.4%	6.6%	7.4%	4.0%
Business	-	10.2%	8.4%	4.0%
Relocating to Hilton Head/Bluffton area	2.0%	0.8%	1.4%	1.5%
N	149	608	215	200

TABLE 13: 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	2024
Part of a vacation	50.0%	85.2%	76.5%	80.0%
Day trip from home	50.0%	14.8%	23.5%	20.0%
N	28	54	34	30

TABLE 14: Day Trip as Part of a Vacation or Day Trip from Home

Where did you stay overnight?

	2021	2022	2023	2024
Jacksonville	9.1%	2.2%	11.5%	26.1%
Savannah	45.5%	8.7%	23.1%	26.1%
Beaufort	18.2%	17.4%	15.4%	21.7%
Charleston	18.2%	39.1%	26.9%	13.0%
Other	9.1%	4.3%	3.8%	13.0%
Tybee Island	-	28.3%	19.2%	-
N	11	46	26	23

TABLE 15: Vacation Day Trip Visitors Overnight Location

Overnight Visitors:

What was your primary form of accommodation while visiting Bluffton?

Figure 10: Type of Accommodation by Year
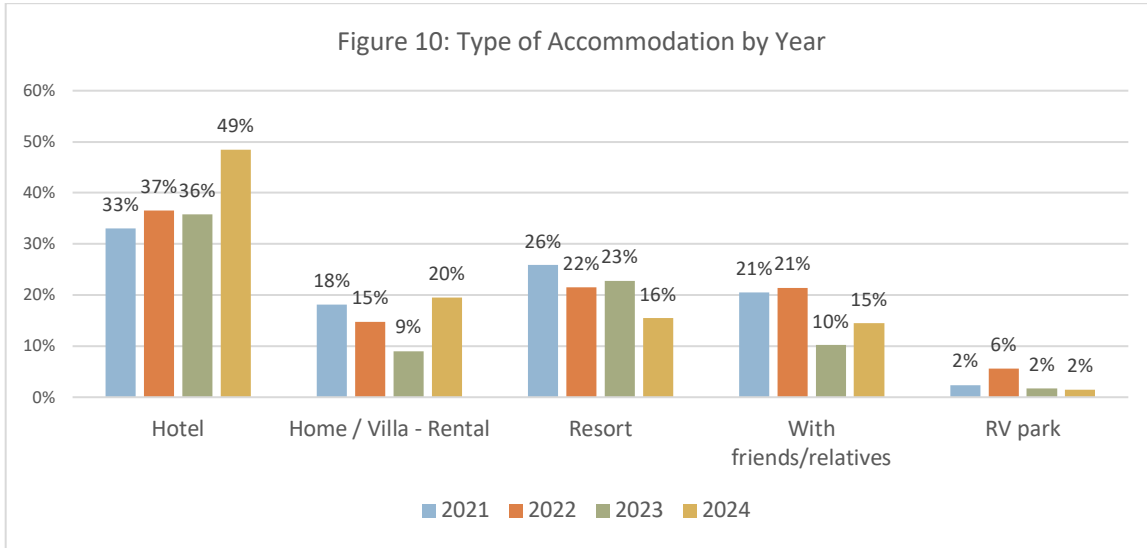
	2021	2022	2023	2024
Hotel	33.1%	36.5%	35.8%	48.5%
Home / Villa - Rental	18.1%	14.8%	9.0%	19.5%
Resort	25.9%	21.5%	22.8%	15.5%
With friends/relatives	20.5%	21.4%	10.2%	14.5%
RV park	2.4%	5.6%	1.7%	1.5%
Home / Villa - Owned	-	-	-	0.5%
Other	-	0.2%	0.2%	48.5%
N	166	608	215	200

TABLE 16: Types of Accommodation

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

Holiday Inn Express	19.5%
Comfort Suites	16.1%
Montage Palmetto Bluff	16.1%
Old Town Bluffton Inn	10.3%
Hampton Inn	8.0%
Comfort Inn Bluffton	3.4%
Hilton Garden Inn	3.4%
Mainstay Suites	3.4%
Fairfield Inn	2.3%
Holiday Inn	2.3%
N	87

TABLE 17: Top 10 Hotels or Resorts

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

|	
VRBO	28.9%
A local vacation rental company	26.3%
Directly with the resort	21.1%
Airbnb	18.4%
HomeAway	2.6%
I don't remember	2.6%
N	38

TABLE 18: Booking Platforms for Home/Villa Rental

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

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Car - Personal/Family	45.8%	67.9%	36.7%	27.8%	27.0%	47.1%	43.5%	40.0%
Plane - Non-stop commercial flight	30.1%	-	30.3%	-	28.8%	-	34.5%	-
Car - Rental	20.5%	14.3%	23.8%	35.2%	27.0%	29.4%	23.0%	23.3%
Plane - Multi-leg commercial flight	10.8%	-	20.7%	-	27.4%	-	18.0%	20.0%
Personal RV	7.2%	-	10.5%	3.7%	8.8%	17.6%	16.5%	-
Plane - Private	7.2%	17.9%	12.5%	18.5%	11.2%	17.6%	8.5%	30.0%
Train	-	-	-	-	-	-	2.0%	20.0%
Motor Coach/Tour bus	4.8%	7.1%	8.7%	18.5%	13.0%	11.8%	1.0%	-
N	166	28	608	54	215	34	200	30

TABLE 19: Modes of Transportation to Bluffton

Figure 11: Modes of Transportation to Bluffton
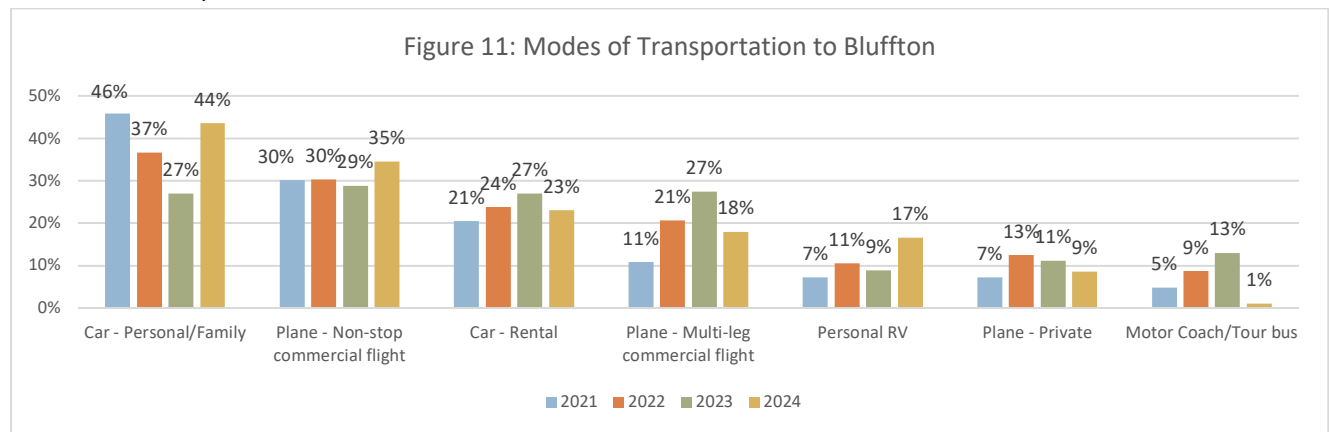
Visitors Arriving by Plane:

At which airport did you land?

Savannah/Hilton Head Island International	50.5%
Hilton Head Island	24.7%
Charleston	13.4%
Atlanta	7.2%
Charlotte	2.1%
N	97

TABLE 20: Arrival Airport

Which commercial airline did you use?

American Airlines	61.4%
Alaska	6.8%
Delta	6.8%
Southwest	5.7%
Frontier	3.4%
JetBlue	3.4%
Air Canada	2.3%
Allegiant	2.3%
Breeze	2.3%
Silver Airways	2.3%
United	2.3%
N	88

TABLE 21: Commercial Airlines Used

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

Figure 12: Transportation while in Bluffton
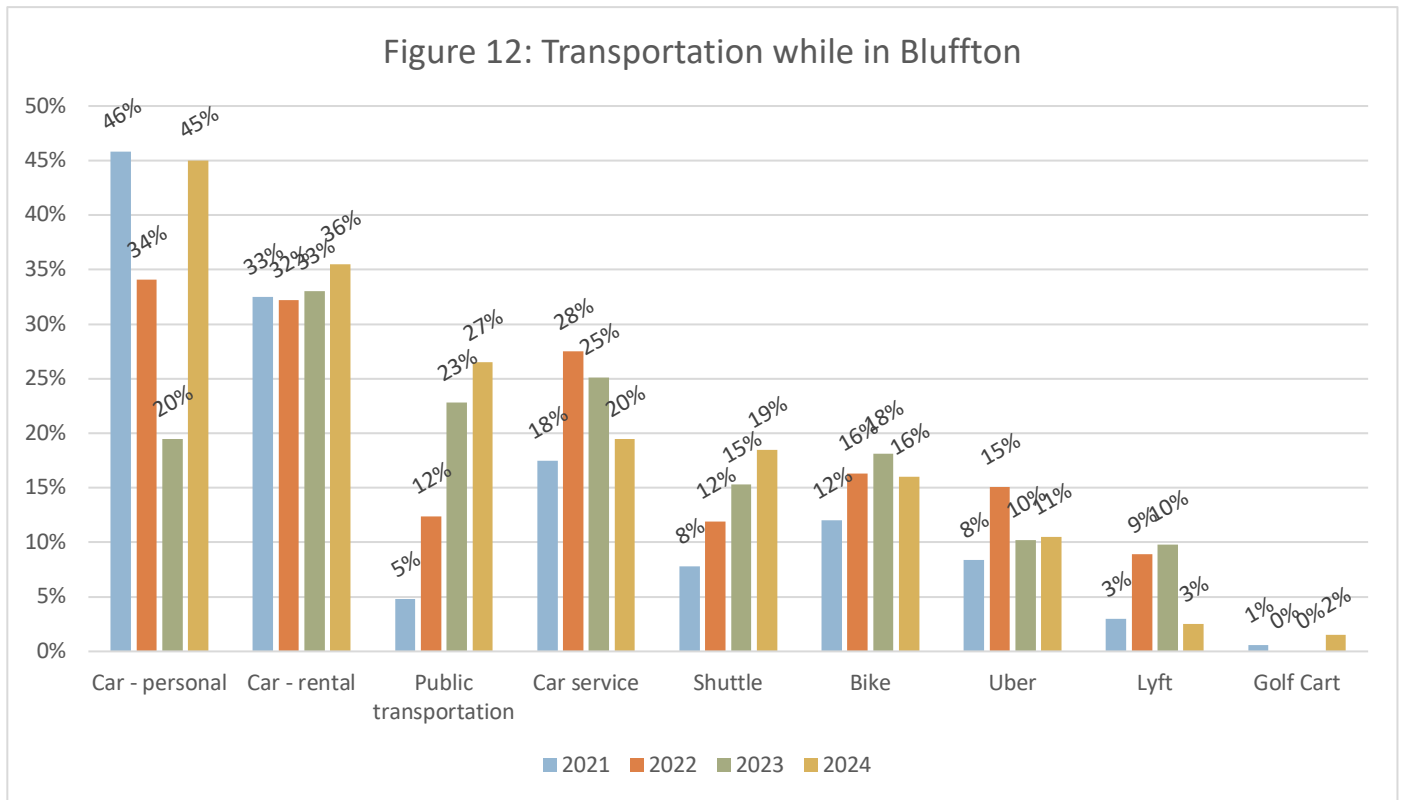
	2021	2022	2023	2024
Car - personal	45.8%	34.1%	19.5%	45.0%
Car - rental	32.5%	32.2%	33.0%	35.5%
Public transportation (HHI Trolley, etc.)	4.8%	12.4%	22.8%	26.5%
Car service	17.5%	27.5%	25.1%	19.5%
Bike	12.0%	16.3%	18.1%	18.5%
Shuttle offered by the hotel/resort	7.8%	11.9%	15.3%	16.0%
Uber	8.4%	15.1%	10.2%	10.5%
Lyft	3.0%	8.9%	9.8%	2.5%
Golf Cart	0.6%	-	-	1.5%
N	166	608	215	200

TABLE 22: Transportation Used While In Bluffton

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

	Overnight	Day Trip	Overall
Transportation	$179.53	$102.40	$155.43
Lodging	$457.36	$0.00	$316.20
Food - Dining	$483.34	$218.56	$401.62
Food - Grocery	$124.29	$48.48	$100.89
Shopping	$484.46	$254.48	$413.48
Spas	$36.36	$73.10	$39.29
Golf	$25.00	$40.00	$29.63
Biking	$24.73	$20.00	$18.65
Performance/Visual Arts	$69.11	$71.03	$57.04
Festivals	$21.61	$44.83	$17.63
Museums/Historical Tours	$80.18	$74.27	$61.50
Boating/Sailing/Fishing	$113.36	$35.92	$89.46
Nature-based Activities	$18.21	$18.00	$18.15
Dolphin Tours	$48.75	$16.40	$38.77
Tennis	$10.71	$16.00	$12.35
Other Expenses	$95.09	$85.84	$92.20
Total Expenditure	$2,266.54	$904.32	$1,846.10

Table 23: Average Per Travel Party Trip Expenditures by Category and Visitor Type

What are the three primary reasons why you visited Bluffton?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Beaches	33.1%	53.6%	30.3%	27.8%	29.8%	44.1%	36.0%	36.7%
Time with family/friends	22.3%	21.4%	23.5%	5.6%	27.4%	26.5%	31.5%	23.3%
Relaxation	21.7%	-	11.0%	9.3%	12.1%	20.6%	25.0%	16.7%
Nature-based activities	16.9%	3.6%	16.1%	3.7%	15.8%	23.5%	21.5%	-
Heritage attractions / Museum / Historical tours	22.3%	25.0%	17.6%	13.0%	17.7%	32.4%	20.0%	43.3%
Shopping	14.5%	28.6%	16.4%	11.1%	19.5%	20.6%	18.5%	16.7%
Business trip (convention, meeting, etc.)	15.1%	10.7%	22.7%	37.0%	26.5%	2.9%	17.0%	10.0%
Festivals	7.8%	3.6%	12.8%	1.9%	7.9%	8.8%	17.0%	-
Boating / Sailing / Kayaking	21.1%	7.1%	22.7%	20.4%	14.4%	-	16.0%	13.3%
Biking	15.7%	14.3%	23.2%	37.0%	13.5%	11.8%	13.5%	20.0%
Golf	11.4%	3.6%	7.9%	13.0%	6.5%	2.9%	7.5%	6.7%
Parks	5.4%	7.1%	8.6%	7.4%	7.0%	2.9%	6.5%	3.3%
Attend sporting event	10.2%	25.0%	12.2%	11.1%	11.2%	2.9%	6.0%	6.7%
Culinary	12.0%	32.1%	10.2%	37.0%	8.8%	20.6%	5.0%	13.3%
Health/wellness/fitness	10.2%	7.1%	11.7%	5.6%	8.4%	8.8%	4.5%	-
Tennis	2.4%	3.6%	4.9%	1.9%	4.2%	26.5%	3.0%	3.3%
Wedding	2.4%	-	3.5%	-	3.3%	2.9%	2.0%	-
Other	-	-	-	-	-	-	6.0%	3.3%
Performance/visual arts	-	3.6%	-	-	1.4%	8.8%	36.0%	36.7%
N	166	28	608	54	215	34	200	30

TABLE 24: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Beaches	40.4%	42.9%	40.6%	37.0%	31.2%	44.1%	48.0%	36.7%
Shopping	22.3%	50.0%	22.0%	18.5%	21.4%	29.4%	41.0%	43.3%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	24.1%	-	20.4%	9.3%	24.7%	23.5%	36.0%	23.3%
Time with family/friends	24.1%	35.7%	20.4%	14.8%	18.6%	20.6%	33.5%	43.3%
Biking	16.9%	7.1%	33.9%	27.8%	27.0%	17.6%	30.5%	23.3%
Relaxation	25.9%	35.7%	15.3%	13.0%	14.9%	8.8%	30.5%	26.7%
Museum / Historical tours	19.3%	10.7%	21.5%	5.6%	20.9%	14.7%	24.5%	33.3%
Culinary	17.5%	42.9%	21.2%	20.4%	20.5%	20.6%	19.0%	10.0%
Festivals	12.7%	7.1%	19.1%	11.1%	14.4%	17.6%	18.5%	10.0%
Music or theatrical performance / Visual arts exhibit	10.2%	7.1%	15.6%	3.7%	19.5%	8.8%	18.5%	16.7%
Business/work	17.5%	14.3%	24.8%	9.3%	22.8%	2.9%	18.0%	13.3%
Water excursions	11.4%	10.7%	9.5%	22.2%	7.9%	17.6%	15.5%	26.7%
Spas	5.4%	3.6%	13.2%	3.7%	10.2%	5.9%	13.5%	3.3%
Health / Wellness / Fitness	16.3%	3.6%	19.6%	18.5%	14.4%	14.7%	12.0%	10.0%
Golf	12.7%	7.1%	16.1%	7.4%	9.3%	5.9%	10.5%	3.3%
Attend sporting event	13.3%	14.3%	17.1%	16.7%	14.0%	11.8%	6.5%	13.3%
Sports activities	5.4%	-	9.2%	3.7%	9.3%	58.8%	5.5%	3.3%
Tennis	5.4%	-	6.9%	1.9%	6.0%	2.9%	5.5%	6.7%
University visit / Education / Intellectual programs	4.2%	10.7%	8.2%	5.6%	5.1%	2.9%	3.5%	3.3%
Other	1.8%	-	-	-	1.4%	5.9%	1.0%	3.3%
Relocation	-	-	-	-	-	-	0.5%	3.3%
N	166	28	608	54	215	34	200	30

TABLE 25: Activities Visitors Participated In

Which shopping locations did you visit?

	2021 (Overnight)	2021 (Day Trip)	2022 (Overnight)	2022 (Day Trip)	2023 (Overnight)	2023 (Day Trip)	2024 (Overnight)	2024 (Day Trip)
Downtown Bluffton	48.2%	39.3%	48.8%	50.0%	50.2%	38.2%	58.5%	46.7%
Harbour Town	26.5%	17.9%	25.8%	33.3%	27.9%	23.5%	32.5%	20.0%
Coligny Plaza	29.5%	25.0%	25.8%	37.0%	24.2%	23.5%	30.5%	3.3%
Tanger Outlets	31.3%	53.6%	21.5%	9.3%	15.3%	5.9%	26.0%	13.3%
Main Street Village	19.3%	17.9%	27.1%	18.5%	24.7%	20.6%	24.5%	13.3%
Buckwalter shopping areas	15.7%	14.3%	19.9%	11.1%	22.3%	8.8%	24.5%	16.7%
The Shops at Sea Pines Center	20.5%	7.1%	17.9%	16.7%	14.9%	35.3%	23.5%	30.0%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	17.5%	28.6%	11.2%	18.5%	22.3%	20.6%	18.0%	30.0%
South Beach Marina	10.2%	3.6%	18.3%	9.3%	17.2%	23.5%	17.0%	13.3%
Shelter Cove Towne Centre	18.1%	17.9%	20.2%	22.2%	25.1%	29.4%	13.5%	13.3%
Shelter Cove Harbour	21.7%	10.7%	20.9%	29.6%	16.7%	20.6%	11.0%	10.0%
Village at Wexford	12.7%	-	14.8%	11.1%	9.8%	11.8%	9.5%	16.7%
None	1.2%	3.6%			0.9%	5.9%	0.5%	3.3%
Other	1.2%	-			-	-	-	-
N	166	28	608	54	215	34	200	30

TABLE 26: Shopping Locations Visited

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

	2021	2022	2023	2024
Hilton Head Island	50.6%	37.7%	43.7%	20.5%
Beaufort	25.9%	27.5%	20.0%	9.4%
Charleston	26.5%	33.7%	32.6%	8.9%
Savannah	27.7%	25.2%	19.5%	7.8%
Daufuskie Island	15.1%	28.5%	20.9%	6.7%
Tybee Island	14.5%	15.3%	14.0%	4.9%
Jacksonville	21.7%	27.3%	24.2%	3.1%
Port Royal	0.6%	0.3%	-	-
Other				0.4%
I did not visit any other cities.	4.2%	4.1%	5.1%	3.4%
N	166	608	215	200

TABLE 27: Other Cities Visited While Staying in Bluffton

TRAVEL PLANNING

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

Figure 13: Consideration of Alternative Destinations
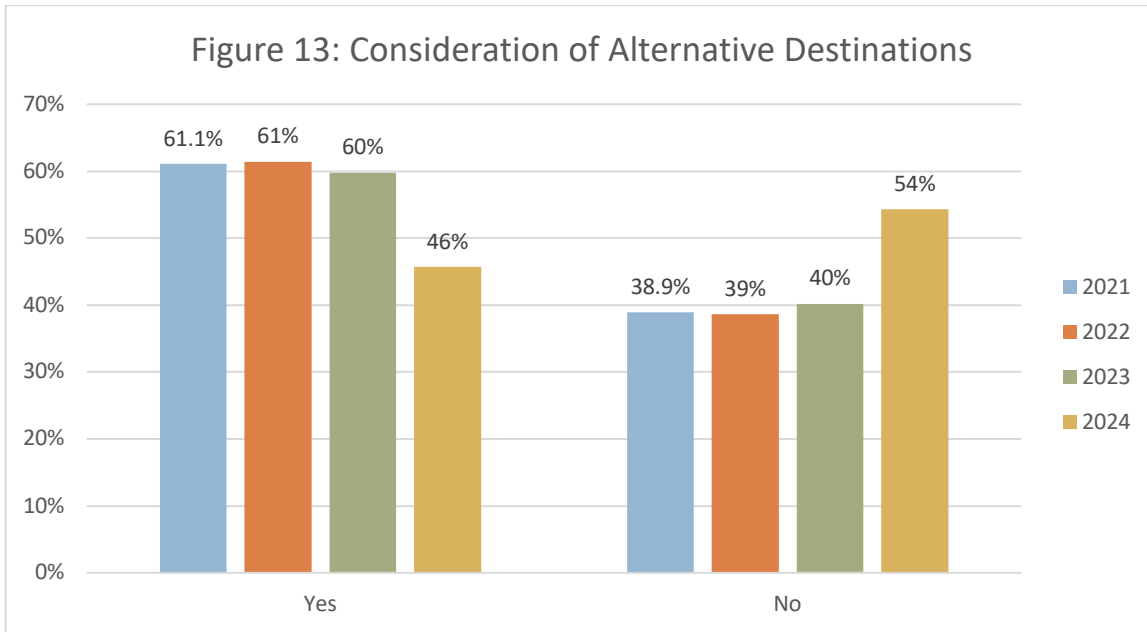
	2021	**2022**	**2023**	**2024**
Yes	61.1%	61.4%	59.8%	45.7%
No	38.9%	38.6%	40.2%	54.3%
N	193	658	249	230

TABLE 28: Consideration of alternative destinations

Which of the following destinations did you consider visiting?

	2021	2022	2023	2024
Hawaiian Islands	22.0%	37.4%	32.9%	37.1%
Gulf Shores, AL	22.0%	29.5%	34.9%	22.9%
Ponte Vedre, FL	9.3%	17.3%	13.4%	22.9%
Isle of Palms, SC	22.0%	26.2%	24.2%	22.9%
Alabama Golf Trail	36.4%	38.1%	36.9%	21.9%
Caribbean	22.0%	26.5%	28.2%	21.9%
Savannah, GA	9.3%	23.8%	14.1%	21.0%
Sea Island, GA	9.3%	21.0%	19.5%	20.0%
Outer Banks, NC	9.3%	20.3%	30.9%	20.0%
Orlando, FL	15.3%	28.7%	16.8%	19.0%
Aspen, CO	36.4%	22.3%	20.1%	18.1%
Marco Island/Naples	15.3%	24.3%	26.8%	15.2%
St. Simons Island, GA	9.3%	10.6%	16.1%	14.3%
Kiawah Island, SC	22.0%	17.1%	18.1%	14.3%
Telluride, CO	7.6%	23.5%	19.5%	14.3%
Sandestin, FL	9.3%	18.3%	15.4%	13.3%
Napa/Sonoma, CA	15.3%	11.4%	14.1%	13.3%
Hilton Head, SC	22.0%	13.9%	10.7%	12.4%
Sarasota, FL	9.3%	12.1%	10.7%	11.4%
Sanibel Island, FL	9.3%	11.9%	20.8%	10.5%
Reynolds Plantation, GA	9.3%	21.3%	20.1%	10.5%
Pinehurst, NC	9.3%	16.3%	16.1%	10.5%
Charleston, SC	22.0%	10.6%	17.4%	10.5%
Myrtle Beach, SC	15.3%	6.9%	6.0%	8.6%
Jekyll Island, GA	22.0%	8.4%	8.7%	7.6%
Tybee Island, GA	7.6%	8.7%	6.0%	6.7%
Santa Fe, NM	9.3%	7.4%	8.7%	6.7%
Tampa/St. Petersburg, FL	7.6%	10.1%	9.4%	5.7%
The Florida Keys	7.6%	5.7%	6.0%	4.8%
Other	15.3%	17.3%	12.1%	5.7%
Total	118	404	149	105

TABLE 29: Alternative Destinations by Year

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

	2021	2022	2023	2024
It was recommended by friends/family	29.0%	35.5%	34.7%	41.3%
Wanted to visit a beach destination	32.6%	34.9%	32.7%	33.5%
Wanted to visit because of the nature-based attractions	23.3%	41.9%	36.7%	32.2%
Wanted to visit someplace new	16.6%	24.0%	21.6%	23.9%
Wanted to visit heritage attractions	19.2%	35.7%	25.7%	22.2%
Saw an advertisement in a magazine/website/social media	17.1%	18.8%	21.2%	21.3%
Had visited in the past and wanted to return	28.0%	22.7%	22.0%	20.9%
Discovered/learned about it on the internet/display ads/search engines	20.2%	19.7%	13.9%	17.4%
Wanted to visit some place within driving distance	19.7%	18.4%	18.8%	16.1%
Wanted to attend a cultural/performing arts event	9.3%	15.8%	13.1%	12.2%
Wanted to attend a sporting event	5.7%	13.7%	7.3%	8.7%
Safe place to visit during or after COVID-19	9.8%	11.7%	10.2%	5.7%
Other	4.7%	1.3%	2.4%	4.3%
Total	193	618	249	230

TABLE 30: Reasons for Visiting Hilton Head Island

How likely are you to return to Bluffton?

	2021	2022	2023	2024
Very likely	59.4%	34.8%	30.8%	46.2%
Likely	26.4%	33.0%	32.1%	35.8%
Neutral	12.3%	24.3%	23.7%	15.1%
Unlikely	0.9%	6.1%	10.7%	2.8%
Very Unlikely	0.9%	1.8%	2.7%	-
Total	106	618	224	212

TABLE 31: Likelihood of Visiting Bluffton Again

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

	2021	2022	2023	2024
Definitely Recommend	70.8%	39.4%	34.5%	54.9%
Probably Recommend	20.8%	40.0%	34.1%	35.3%
May or May Not Recommend	7.5%	17.2%	21.8%	8.9%
Probably Not Recommend	0.9%	3.1%	9.2%	0.9%
Definitely Not Recommend	0.0%	0.3%	0.4%	-
Total	106	635	229	224

TABLE 32: Likelihood of Recommending a Visit to Bluffton

NON-VISITORS

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

Figure 14: Reasons for Not Visiting
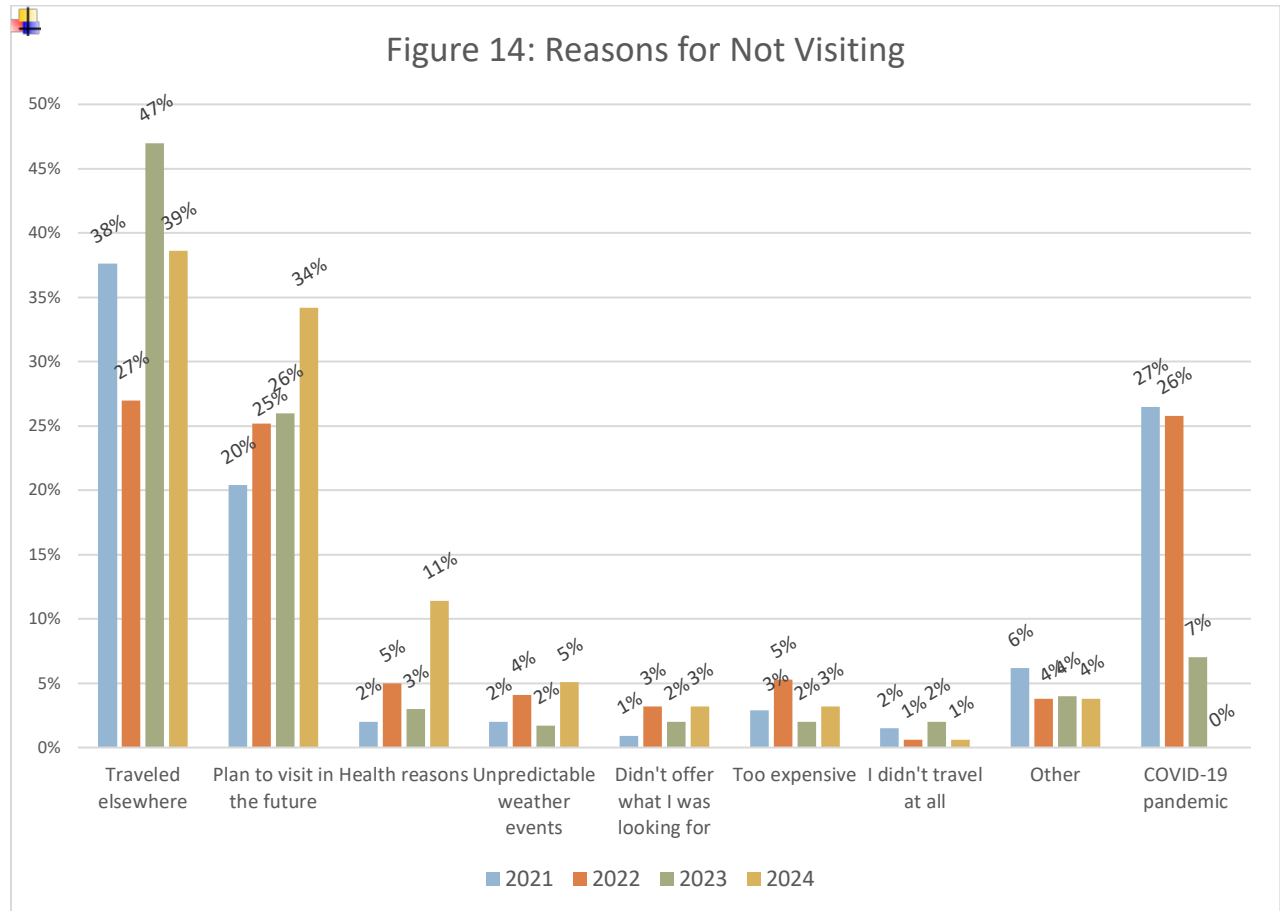
	2021	**2022**	**2023**	**2024**
Traveled elsewhere	37.6%	27.0%	47.0%	38.6%
Plan to visit in the future	20.4%	25.2%	26.0%	34.2%
Health reasons	2.0%	5.0%	3.0%	11.4%
Unpredictable weather events	2.0%	4.1%	1.7%	5.1%
Didn't offer what I was looking for	0.9%	3.2%	2.0%	3.2%
Too expensive	2.9%	5.3%	2.0%	3.2%
I didn't travel at all	1.5%	0.6%	2.0%	0.6%
Other	6.2%	3.8%	4.0%	3.8%
COVID-19 pandemic	26.5%	25.8%	7.0%	-
Total	860	341	100	158

TABLE 33: Reasons for not visiting

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

	2021	2022	2023	2024
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%	34.4%
USA - Northeast (CT, MA, MA, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%	33.1%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%	25.5%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%	23.6%
Canada	1.4%	10.9%	16.0%	16.6%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%	14.6%
Europe	1.2%	7.3%	10.0%	14.6%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%	14.0%
Latin America and Caribbean	2.1%	6.5%	6.0%	12.1%
Asia	0.5%	4.4%	8.0%	12.1%
Australia/New Zealand	0.2%	3.2%	6.0%	5.1%
Africa	0.3%	1.2%	1.0%	2.5%
Total	860	341	100	157

TABLE 34: 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	2024
Never visited	38.9%	42.9%	33.7%	29.7%
1	18.6%	14.0%	9.5%	16.3%
2 to 5	30.2%	36.4%	40.8%	45.5%
6 to 10	9.8%	5.0%	13.6%	6.5%
11 to 20	1.9%	0.9%	1.2%	1.6%
21 or more	0.9%	0.5%	1.2%	0.4%
Total	860	341	169	246

TABLE 35: 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	2024
Yes, within one year	49.2%	50.1%	48.8%	36.7%
Yes, but not sure when	42.5%	49.0%	47.0%	55.9%
No	8.3%	0.9%	4.2%	36.7%
Total	859	341	168	245

TABLE 36: 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	2024
0 to 1	15.3%	10.0%	7.3%	11.7%
2 to 4	55.1%	47.3%	50.6%	57.8%
5 to 7	19.2%	29.9%	23.4%	18.8%
8 to 10	6.3%	8.2%	15.8%	8.7%
More than 10	4.1%	4.7%	2.9%	3.0%
Total	1,042	984	1,625	1,025

TABLE 37: Frequency of Leisure/Vacation Trips

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

Figure 15: Preferred Travel Months
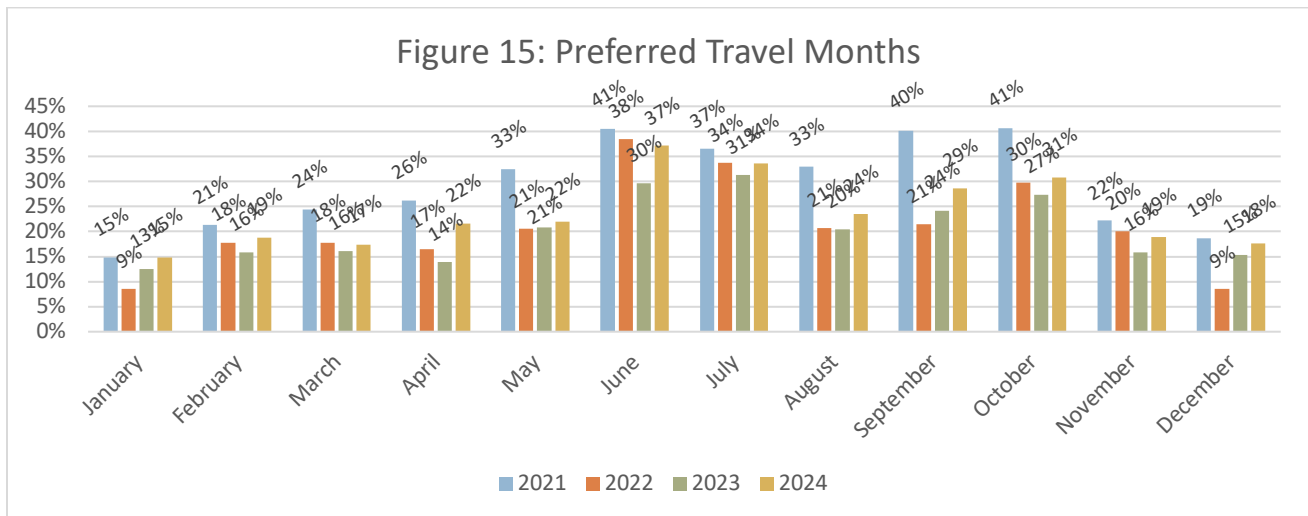
	2021	2022	2023	2024
January	14.8%	8.5%	12.6%	14.8%
February	21.3%	17.8%	15.9%	18.8%
March	24.4%	17.7%	16.1%	17.4%
April	26.2%	16.5%	13.9%	21.6%
May	32.5%	20.5%	20.8%	21.9%
June	40.5%	38.4%	29.6%	37.1%
July	36.5%	33.7%	31.3%	33.7%
August	32.9%	20.7%	20.4%	23.6%
September	40.1%	21.4%	24.1%	28.7%
October	40.6%	29.8%	27.3%	30.8%
November	22.2%	20.0%	15.8%	18.8%
December	18.7%	8.5%	15.3%	17.6%
Total	1,042	984	1,625	1,040

TABLE 38: Preferred Travel Months

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

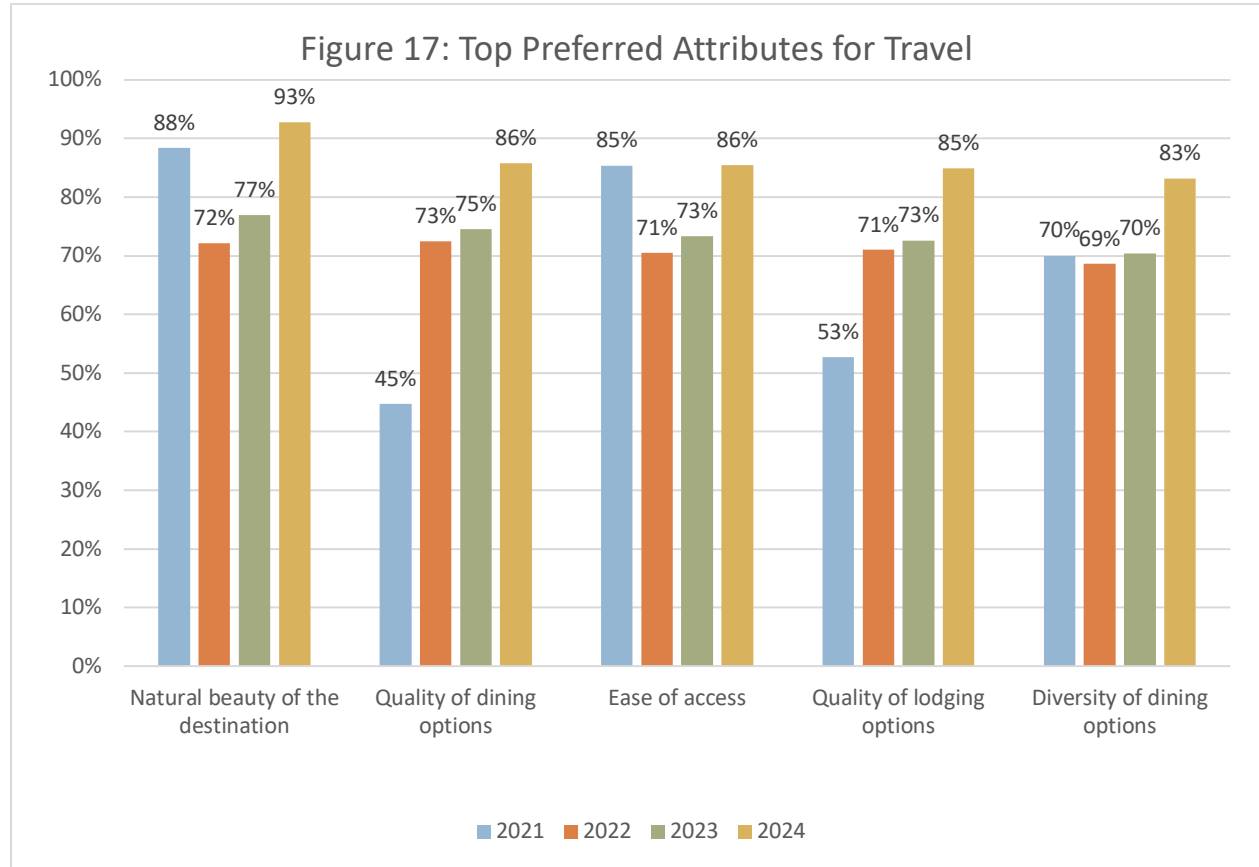| "Appealing" + "Very Appealing"	2021	2022	2023	2024
Beaches	88.4%	65.1%	71.2%	87.1%
Relaxation & rejuvenation	85.4%	66.9%	72.2%	85.3%
Passive outdoor adventures	72.6%	64.4%	63.7%	76.1%
Romantic couple getaways	70.0%	65.0%	60.8%	74.7%
Historic attractions	75.5%	64.4%	60.9%	73.6%
Culinary experiences	70.1%	63.7%	60.3%	73.0%
Cultural experiences	70.7%	62.9%	57.5%	72.1%
Quality nightlife options	52.6%	60.3%	52.2%	66.7%
Learning while traveling	60.9%	56.3%	54.1%	66.2%
Immersion excursions	49.6%	57.4%	51.1%	66.1%
Active outdoor adventures	46.8%	59.6%	51.9%	64.8%
Exploration	57.5%	59.8%	54.1%	63.7%
Art	49.8%	57.1%	49.2%	63.1%
Theme parks	44.7%	58.7%	51.7%	63.1%
Warm weather sports	52.7%	61.2%	53.5%	62.9%
Water sports	48.8%	60.4%	51.1%	62.1%
Performing/cultural arts getaways	51.2%	58.6%	50.5%	61.0%
Luxury camping	39.9%	55.0%	50.7%	60.6%
Urban getaway	48.4%	58.5%	48.0%	60.2%
Spectator sporting events	49.2%	57.0%	51.5%	59.7%
Waterparks	40.3%	54.4%	47.9%	58.4%
Medical/wellness	40.8%	55.5%	47.9%	56.1%
Golf getaways	37.4%	50.6%	41.9%	52.3%
Winter sports	30.2%	53.9%	42.5%	51.7%
Voluntourism	29.5%	49.9%	40.8%	47.6%
Tennis getaways	25.8%	48.5%	36.2%	47.0%
Total	949	1,005	1,625	967

TABLE 39: Preferred Vacation/Leisure Travel Experiences

Figure 16: Preferred Travel Experiences

Beaches, 87.1%

Relaxation & rejuvenation, 85.3%

Passive outdoor adventures, 76.1%

Romantic couple getaways, 74.7%

Historic attractions, 73.6%

Culinary experiences, 73.0%

Cultural experiences, 72.1%

Quality nightlife options, 66.7%

Learning while traveling, 66.2%

Immersion excursions, 66.1%

Exploration, 63.7%

Art, 63.1%

Active outdoor adventures, 64.8%

Theme parks, 63.1%

Warm weather sports, 62.9%

Water sports, 62.1%

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

Figure 17: Top Preferred Attributes for Travel

"Important" + "Very Important"	2021	2022	2023	2024
Natural beauty of the destination	88.4%	72.1%	76.9%	92.8%
Quality of dining options	44.7%	72.5%	74.6%	85.8%
Ease of access	85.4%	70.5%	73.3%	85.5%
Quality of lodging options	52.7%	71.0%	72.6%	84.9%
Diversity of dining options	70.0%	68.6%	70.4%	83.2%
Affordability	75.5%	67.2%	73.0%	80.6%
Diversity of lodging options	25.8%	67.3%	65.9%	77.8%
Low traffic congestion	60.9%	64.8%	63.6%	74.7%
Travel distance	70.7%	63.1%	63.3%	71.1%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%	69.9%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%	66.9%
Activities like events/festivals	49.6%	64.2%	55.4%	66.0%
Nightlife activity options	48.4%	61.4%	53.2%	65.7%
Medical/wellness	37.4%	60.4%	52.6%	60.1%
Public transportation	57.5%	57.0%	49.2%	57.9%
Total	949	1,005	1,625	967

TABLE 40: 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.	8.8%	19.8%	25.2%	31.2%	15.0%
I try to support the local economy of places that I visit.	28.0%	47.8%	17.3%	3.3%	3.5%
N 989					

TABLE 41: 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%

MSA	Count	Percent
San Antonio-New Braunfels, TX	7	0.6%
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%

MSA	Count	Percent
Sumter, SC	3	0.3%
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%
Tullahoma-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%