

2025

Hilton Head Island

VISITOR PROFILE SURVEY

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HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE

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EXECUTIVE SUMMARY

VISITOR AND SAMPLE DEMOGRAPHICS

Baby Boomers (62+ years old) represented 56.8% of the survey respondents, followed by Millennials (30-45 years old) (20.5%), Gen X (46-61 years old) (18.8%), and then Gen Z (19-29 years old) (2.5%). The visitor intelligence company Zartico, which analyzes geolocation data, estimates visitor age follows a somewhat similar pattern, with visitors 45-64 years old being the largest segment (35.0%), followed by 25-44 years old (32.0%), 65 years old and up (24.0%), and then 18-24 years old (8.0%). Over 64% of those surveyed had a Bachelor's degree or higher, and more than 79% had an annual household income of \$75,000 or more. Zartico also estimates that visitors have high household incomes, with 71.0% earning \$81,000 or more. Approximately 80% of the respondents were married.

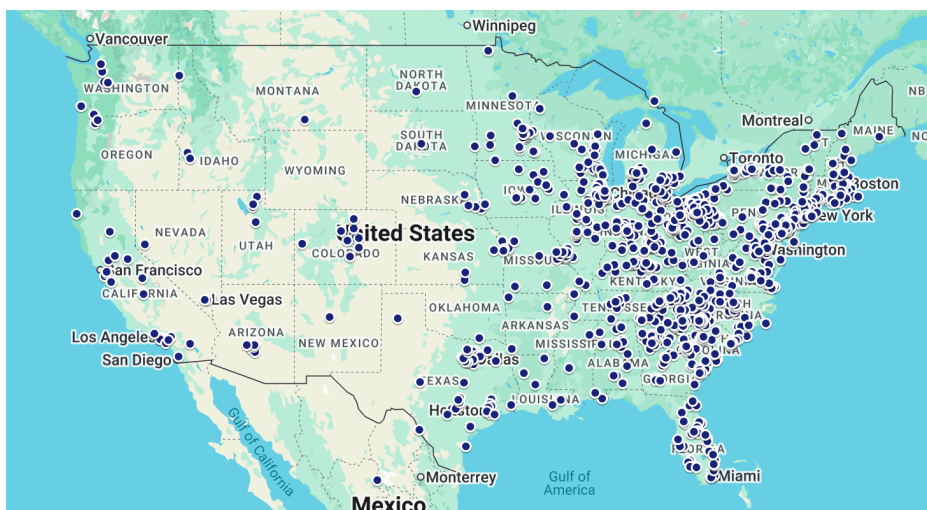
POINT OF ORIGIN

The respondents resided in 294 geographic areas (Metropolitan Statistical Areas) across the U.S., from the East Coast to the West Coast. More respondents resided in Ohio than in any other state (12.5%). Second was Pennsylvania (6.6%), followed by North Carolina (6.2%), New York (5.6%), Georgia (5.4%), and Illinois (5.3%). Data provider Placer.ai, which like Zartico also analyzes geolocation data, estimates the top states of visitor origin to be Georgia (16.8%), North Carolina (10.3%), Ohio (8.8%), New York (6.4%), and Virginia (6.4%). In-state visitors represented 8.2% of the survey respondents.

According to a market penetration analysis, the following MSAs were major markets amongst respondents: New York-Newark-Jersey City, NY-NJ; Chicago-Naperville-Elgin, IL-IN; Atlanta-Sandy Springs-Roswell, GA; Charlotte-Concord-Gastonia, NC-SC;

Cincinnati, OH-KY-IN; Pittsburgh, PA; Philadelphia-Camden-Wilmington, PA-NJ-DE-MD; Columbus, OH; Minneapolis-St. Paul-Bloomington, MN-WI; and Akron, OH. Both Zartico and Placer.ai estimate the top 10 metropolitan areas to be Atlanta, GA; Charlotte, NC; New York, NY; Greenville-Spartanburg-Anderson, SC; Asheville, NC; Columbia, SC; Augusta, GA-Aiken, SC; Raleigh-Durham-Fayetteville, NC; Cleveland-Akron-Canton, OH; Washington, DC-Hagerstown, MD; and Charleston, SC.

Canada was the top origin market amongst international respondents (69.2%), followed by Europe (15.4%) and the Caribbean (7.7%).



THOSE WHO TRAVELED TO HILTON HEAD ISLAND

The top three reasons for choosing Hilton Head Island as a destination continue to be visiting beaches (76.0%), relaxation (61.4%), and spending time with family and friends (46.6%). These motivations were followed by culinary experience (16.1%), biking (13.2%), shopping (10.5%), nature-based activities (10.4%), golf (8.0%), and heritage attractions (6.9%). The activities in which visitors actually participated are similar to the previously mentioned activities, and also include historical tours, water excursions, and arts performances or exhibits.

Among Hilton Head Island's overnight visitors, 37.6% indicated they were visiting Hilton Head Island for the first time, suggesting that the destination continues to appeal to new visitors.



TRIP CHARACTERISTICS

The average group size of those surveyed was 3.6 for overnight visitors and 4.7 for day trip visitors. The main mode of transportation to and around the island continues to be personal/family car (68.3%), followed by various modes of flying to the destination (22.1%). The majority of visitors fly into Hilton Head Island Airport, followed by Savannah/Hilton Head Island International Airport.

The average length of stay for those surveyed varied by segment; those staying in villa rentals stayed approximately 7.7 nights, hotel visitors stayed 6.4 nights, timeshare visitors stayed 7.3 nights, and second homeowners stayed 9.1 nights. The overall average was 6.9 nights.



Villa/home rentals stood out as the most popular choice of paid accommodation for overnight visitors (38.5%), followed by resorts (22.6%), timeshare units (17.8%), and hotels (11.9%).

TRAVEL PLANNING

VRBO was the most popular online booking platform for villas/homes (29.1%), followed by local vacation rental companies (25.1%), Airbnb (14.2%), and the local resorts' online booking platforms (e.g., Sea Pines, Palmetto Dunes) (12.4%).

Savannah, Charleston, Myrtle Beach, Outer Banks, and Tybee Island were the top competitors for Hilton Head Island as alternative beach destinations. The top competing market was Savannah.

The top reasons for choosing Hilton Head Island were previous visit experience (56.8%), wanting to visit a beach destination (50.2%), wanting to visit someplace new (24.0%), word-of-mouth recommendation (23.7%), and wanting to visit someplace within driving distance from home (22.8%).

Of those visitors surveyed, 88.2% 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=331), 53.5% had never visited the Hilton Head Island / Bluffton area before, and 39.6% had visited one to five times before.

Of those non-visitors, 39.3% traveled elsewhere, 34.7% plan to visit in the future, 6.6% found it too expensive, 3.6% mentioned health reasons, and 1.2% didn't find what they were looking. Only 0.9% did not travel at all. Alternative destinations of those who did not visit the Hilton Head Island / Bluffton area included destinations most commonly in the Southeast (48.9%) and West (24.2%). Nonetheless, 51.1% 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 (59.4%) 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 (93.0%), relaxation and rejuvenation (70.1%), historic attractions (46.0%), romantic couple getaways (40.6%), and passive outdoor adventures (25.4%).

The following attributes were most important in choosing a leisure vacation: natural beauty of the destination (90.7%), ease of access (89.3%), quality of lodging options (88.1%), affordability (86.9%), and quality of dining options (86.7%).

METHODOLOGY

The 2025 Visitor Profile Study (VPS) for the Hilton Head Island and Bluffton Area was conducted electronically. Between mid-January 2025 and January 2026, 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 period on the Hilton Head Island Visitor & Convention Bureau's and Explore Bluffton's social media channels.

A total of 1,539 completed surveys were collected. This report is largely based on the 1,086 respondents who visited Hilton Head Island as an overnight or day trip, along with 331 individuals who did not travel at all or did not travel to Hilton Head Island / Bluffton. The remaining 122 responses were individuals who only visited Bluffton and are covered in a separate report.

This report represents the results of the present study, together with comparative results from the last five times this study was completed, examining visitation in 2019, 2021, 2022, 2023, and 2024. 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 for 2021 through 2025. 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	2024	2025	%Chg vs 2021	%Chg vs 2022	%Chg vs 2023	%Chg vs 2025
Villa/Home Rentals	962,686	951,126	920,345	834,495	795,108	-17.4%	-16.4%	-13.6%	-4.7%
Hotels/Resorts	508,977	497,574	481,328	453,826	408,261	-19.8%	-17.9%	-15.2%	-10.0%
Timeshares	481,934	481,461	477,628	483,070	476,094	-1.2%	-1.1%	-0.3%	-1.4%
Second Homeowners	719,302	710,673	674,278	652,215	603,999	-16.0%	-15.0%	-10.4%	-7.4%
Non-paying Guests	186,667	184,428	174,983	169,258	156,745	-16.0%	-15.0%	-10.4%	-7.4%
Day trippers	267,290	264,083	255,358	242,361	228,346	-14.6%	-13.5%	-10.6%	-5.8%
Total Visitors	3,126,856	3,089,346	2,983,919	2,835,224	2,668,553	-14.7%	-13.6%	-10.6%	-5.9%

Table 1: Visitor Estimates for 2021-2025 and Percent Change Comparison

VISITORS' DEMOGRAPHIC AND GEOGRAPHIC PROFILE

The profile characteristics presented in this section are derived from smartphone-based geolocation data provided by Zartico and Placer.ai.

DEMOGRAPHICS

	2025
Income	
Less than \$20,000	3.0%
\$21,000-\$40,000	6.0%
\$41,000-\$60,000	8.0%
\$61,000-\$80,000	12.0%
\$81,000-\$100,000	13.0%
\$101,000-\$150,000	23.0%
\$151,000+	35.0%
Age	
18-24	8.0%
25-34	15.0%
35-44	17.0%
45-54	18.0%
55-64	17.0%
65+	24.0%

Table 2: Demographics (Zartico)

POINT OF ORIGIN

Visitor Origin by State

State	% of Visitors	State	% of Visitors	State	% of Visitors
Georgia	16.84%	California	1.22%	Maine	0.21%
South Carolina	11.30%	Alabama	1.04%	Vermont	0.17%
North Carolina	10.25%	Maryland	1.04%	Nebraska	0.15%
Ohio	8.83%	Wisconsin	0.97%	Kansas	0.15%
New York	6.44%	West Virginia	0.93%	Nevada	0.14%
Virginia	6.43%	Colorado	0.81%	Oregon	0.13%
Florida	5.72%	Minnesota	0.81%	Louisiana	0.13%
Pennsylvania	5.29%	Connecticut	0.65%	N/A	0.12%
Tennessee	3.52%	Arizona	0.45%	South Dakota	0.08%
Illinois	2.76%	Mississippi	0.41%	New Mexico	0.07%
Michigan	2.09%	Iowa	0.36%	North Dakota	0.07%
Kentucky	2.04%	Washington	0.31%	Idaho	0.06%
Massachusetts	1.99%	Rhode Island	0.28%	Montana	0.05%
Texas	1.85%	Oklahoma	0.26%	Hawaii	0.03%
Indiana	1.56%	Utah	0.24%	Alaska	0.02%
Missouri	1.47%	Arkansas	0.23%	Wyoming	0.02%

Table 3: Visitor Origin by State (Placer.ai)

Visitor Origin by DMA

DMA Name	% of Visitors	DMA Name	% of Visitors
Atlanta	10.3%	Macon	1.1%
Charlotte	6.0%	Tampa-St. Pete (Sarasota)	1.1%
New York	4.9%	Indianapolis	1.1%
Greenville-Spartanburg-Asheville	4.8%	Baltimore	0.9%
Augusta-Aiken	3.7%	Lexington	0.9%
Columbia, SC	3.0%	Dallas-Ft. Worth	0.9%
Washington, DC (Hagerstown)	2.9%	Louisville	0.9%
Cleveland-Akron (Canton)	2.9%	St. Louis	0.8%
Charleston, SC	2.7%	Richmond-Petersburg	0.8%
Raleigh-Durham (Fayetteville)	2.3%	Minneapolis-St. Paul	0.8%
Cincinnati	2.3%	Chattanooga	0.7%
Chicago	2.3%	Myrtle Beach-Florence	0.7%
Philadelphia	2.1%	Roanoke-Lynchburg	0.7%
Columbus, OH	2.1%	Denver	0.7%
Pittsburgh	2.0%	Charleston-Huntington	0.7%
Boston (Manchester)	1.8%	Hartford & New Haven	0.7%
Knoxville	1.5%	Buffalo	0.6%
Orlando-Daytona Beach-Melbourne	1.4%	West Palm Beach-Ft. Pierce	0.6%
Savannah	1.3%	Miami-Ft. Lauderdale	0.6%
Nashville	1.2%	Harrisburg-Lancaster-Lebanon-York	0.6%
Tri-Cities, TN-VA	1.2%	Los Angeles	0.5%
Greensboro-High Point-Winston-Salem	1.2%	Norfolk-Portsmouth-Newport News	0.5%
Jacksonville	1.2%	Birmingham (Anniston and Tuscaloosa)	0.5%
Detroit	1.2%	Dayton	0.5%

DMA Name	% of Visitors	DMA Name	% of Visitors
Grand Rapids-Kalmzoo-B.Crk	0.5%	N/A	0.1%
Milwaukee	0.5%	Gainesville	0.1%
Ft. Myers-Naples	0.4%	Paducah-Cape Girard-Harsbg	0.1%
Wilmington	0.4%	Colorado Springs-Pueblo	0.1%
Kansas City	0.4%	Springfield, MO	0.1%
Houston	0.4%	Las Vegas	0.1%
Toledo	0.4%	Erie	0.1%
Phoenix (Prescott)	0.4%	Traverse City-Cadillac	0.1%
Rochester, NY	0.3%	Portland, OR	0.1%
Youngstown	0.3%	Omaha	0.1%
San Francisco-Oak-San Jose	0.3%	Parkersburg	0.1%
Wilkes Barre-Scranton-Hztn	0.3%	Tulsa	0.1%
Providence-New Bedford	0.3%	Clarksburg-Weston	0.1%
Albany-Schenectady-Troy	0.3%	Davenport-R.Island-Moline	0.1%
Greenville-N.Bern-Washngtn	0.3%	Salisbury	0.1%
Columbus, GA (Opelika, AL)	0.3%	Ft. Smith-Fay-Sprngdl-Rgrs	0.1%
Memphis	0.2%	Wichita-Hutchinson Plus	0.1%
Huntsville-Decatur (Flor)	0.2%	Tucson (Sierra Vista)	0.1%
Seattle-Tacoma	0.2%	Bowling Green	0.1%
Salt Lake City	0.2%	Montgomery-Selma	0.1%
Tallahassee-Thomasville	0.2%	Panama City	0.1%
Green Bay-Appleton	0.2%	Terre Haute	0.1%
Austin	0.2%	Rockford	0.1%
Madison	0.2%	Albuquerque-Santa Fe	0.1%
Evansville	0.2%	Lima	0.1%
Syracuse	0.2%	Sioux Falls(Mitchell)	0.1%
Johnstown-Altoona-St Colge	0.2%	Columbia-Jefferson City	0.1%
Champaign&Sprngfld-Decatur	0.2%	Waco-Temple-Bryan	0.1%
Des Moines-Ames	0.2%	La Crosse-Eau Claire	0.1%
Mobile-Pensacola (Ft Walt)	0.2%	Columbus-Tupelo-West Point	0.1%
Bluefield-Beckley-Oak Hill	0.2%	Jackson, MS	0.05%
Burlington-Plattsburgh	0.2%	Zanesville	0.05%
Albany, GA	0.2%	Lincoln & Hastings-Krny	0.05%
Ft. Wayne	0.2%	Spokane	0.05%
Portland-Auburn	0.2%	Bangor	0.05%
South Bend-Elkhart	0.2%	Elmira (Corning)	0.05%
Springfield-Holyoke	0.2%	Fargo	0.05%
Oklahoma City	0.1%	Shreveport	0.05%
Lansing	0.1%	Tyler-Longview(Lfkn&Ncgd)	0.04%
Charlottesville	0.1%	Lafayette, IN	0.04%
San Diego	0.1%	Dothan	0.04%
Flint-Saginaw-Bay City	0.1%	Boise	0.04%
Cedar Rapids-Wtrlo-IWC&Dub	0.1%	Binghamton	0.04%
San Antonio	0.1%	Utica	0.04%
Sacramnto-Stkton-Modesto	0.1%	Baton Rouge	0.04%
Little Rock-Pine Bluff	0.1%	Reno	0.04%
Wheeling-Steubenville	0.1%	Topeka	0.03%
Peoria-Bloomington	0.1%	Jackson, TN	0.03%
Harrisonburg	0.1%	Honolulu	0.03%

DMA Name	% of Visitors	DMA Name	% of Visitors
Watertown	0.03%	Rapid City	0.01%
Amarillo	0.03%	Butte-Bozeman	0.01%
Duluth-Superior	0.03%	Lake Charles	0.01%
Sioux City	0.03%	Meridian	0.01%
Rochestr-Mason City-Austin	0.03%	Monroe-El Dorado	0.01%
Monterey-Salinas	0.03%	Chico-Redding	0.01%
Joplin-Pittsburg	0.03%	Corpus Christi	0.01%
Quincy-Hannibal-Keokuk	0.03%	Beaumont-Port Arthur	0.01%
Yakima-Pasco-RchInd-Knnwck	0.03%	Cheyenne-Scottsbluff	0.01%
Wausau-Rhineland	0.02%	Anchorage	0.01%
El Paso (Las Cruces)	0.02%	Ottumwa-Kirksville	0.01%
Grand Junction-Montrose	0.02%	Wichita Falls & Lawton	0.01%
Sherman-Ada	0.02%	Bakersfield	0.01%
Bismarck-Mnt-Dcknsn(Wlstn)	0.02%	Harlingen-Wslco-Brnsvl-Mca	0.01%
Marquette	0.02%	Bend, OR	0.01%
Palm Springs	0.02%	Twin Falls	0.01%
Eugene	0.02%	Alexandria, LA	0.01%
Lubbock	0.02%	Yuma-El Centro	0.01%
Biloxi-Gulfport	0.02%	St. Joseph	0.01%
Mankato	0.02%	Greenwood-Greenville	0.01%
Santabarbra-Sanmar-Sanluob	0.02%	Helena	0.01%
Lafayette, LA	0.02%	Casper-Riverton	0.01%
Fresno-Visalia	0.02%	San Angelo	0.01%
Odessa-Midland	0.02%	Juneau	0.005%
Jonesboro	0.02%	Medford-Klamath Falls	0.004%
Billings	0.02%	Laredo	0.003%
Idaho Fals-Pocatillo(Jcksn)	0.02%	Great Falls	0.002%
Missoula	0.02%	Presque Isle	0.001%
Hattiesburg-Laurel	0.02%	Fairbanks	0.001%
Abilene-Sweetwater	0.02%		

Table 4: Visitor Origin by Market (Placer.ai)

SURVEY FINDINGS

SAMPLE DEMOGRAPHICS

	2019	2021	2022	2023	2024	2025
Gender						
Female	67.4	62.5%	48.8%	54.1%	49.0%	64.2%
Male	32.6	37.4%	51.1%	45.7%	50.7%	35.6%
Self-identify	-	0.1%	-	0.3%	0.3%	0.1%
Marital Status						
Married	76.7%	76.7%	77.3%	86.4%	72.7%	80.0%
Single	8.5%	9.2%	9.9%	6.7%	14.9%	6.9%
Divorced	7.4%	7.7%	5.8%	3.4%	6.6%	7.1%
Widowed	3.1%	5.3%	5.9%	2.8%	4.3%	5.5%
Separated	0.5%	1.1%	1.1%	0.7%	1.5%	0.5%
Living as Married	3.8%	-	-	-	-	-
Education (highest level completed)						
Grade School	0.2%	0.7%	0.4%	0.9%	0.6%	0.4%
High School	8.0%	8.0%	6.5%	3.8%	7.2%	7.9%
Some College	19.6%	20.9%	21.5%	22.6%	24.0%	14.3%
Associate's Degree (2 years)	13.1%	13.6%	13.2%	16.0%	14.2%	12.6%
Bachelor's Degree (4 years)	31.5%	32.9%	32.3%	33.0%	35.2%	37.3%
Graduate Degree (Post degree/MA)	26.9%	23.8%	26.1%	23.7%	18.8%	27.5%
Age						
19 years or younger	0.1%	0.1%	0.1%	0.3%	0.6%	0.1%
20 to 29 years	0.9%	10.5%	23.8%	24.1%	33.0%	2.4%
30 to 39 years	5.9%	16.5%	28.8%	39.4%	32.1%	8.0%
40 to 49 years	15.3%	12.6%	13.1%	8.3%	12.1%	12.5%
50 to 59 years	26.8%	18.7%	10.9%	9.4%	7.1%	18.8%
60 to 69 years	34.4%	25.8%	14.2%	11.6%	8.6%	31.8%
70 years and over	15.9%	14.5%	8.6%	6.3%	6.0%	25.0%
Prefer not to say	0.6%	1.4%	0.3%	0.5%	0.5%	1.5%
Household Income						
Under \$24,999	1.4%	2.3%	1.5%	1.1%	3.2%	1.4%
\$25,000-\$34,999	1.8%	6.3%	4.1%	1.8%	5.8%	2.7%
\$35,000-\$49,999	5.5%	7.7%	8.0%	6.5%	9.9%	5.0%
\$50,000-\$74,999	12.6%	15.7%	12.2%	17.1%	18.4%	11.4%
\$75,000-\$99,999	14.6%	17.7%	17.2%	17.0%	21.0%	15.8%
\$100,000-\$149,999	22.1%	24.6%	21.8%	17.0%	22.0%	25.6%
\$150,000-\$199,999	11.3%	13.0%	17.1%	18.0%	9.7%	16.8%
\$200,000-\$249,999	5.8%	5.9%	9.4%	15.9%	5.0%	9.6%
\$250,000 or more	6.2%	6.8%	8.6%	5.6%	5.0%	11.8%
Not Applicable	18.8%	-	-	-	-	-
N	1,682	1,884	1,913	1,154	1,040	1,539

Table 5: Demographics

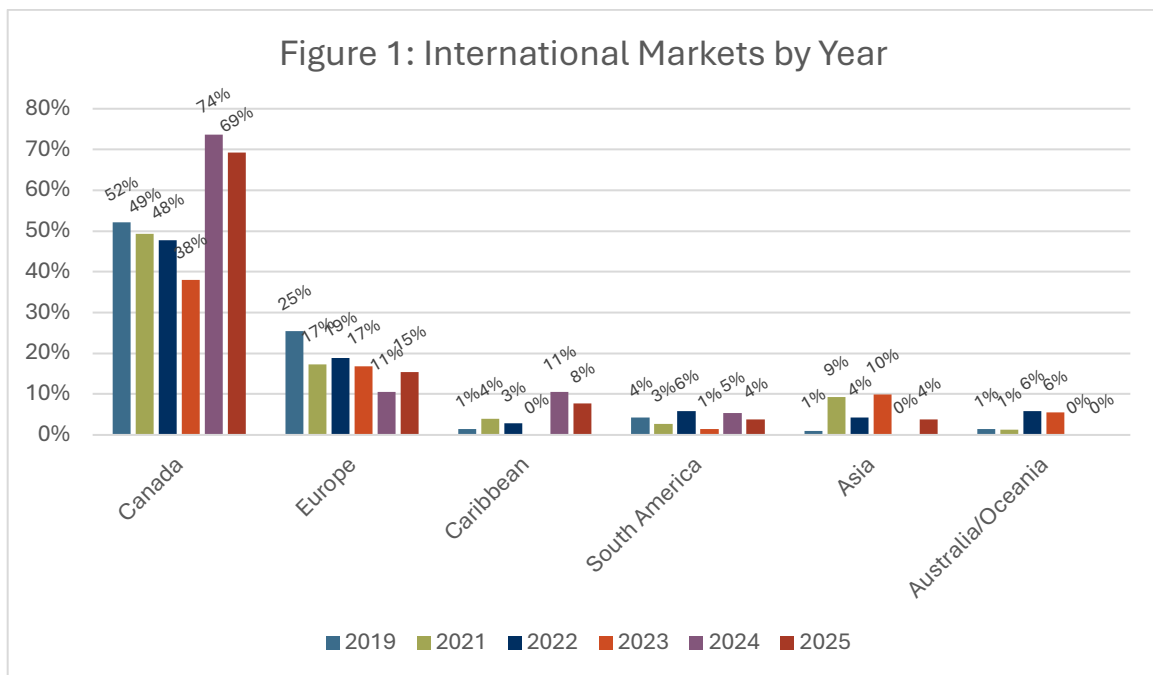
SAMPLE POINT OF ORIGIN

ZIP Code Analysis – Top 30 MSAs

	Metropolitan Area	Sum MSA	Percent MSA Share
1	New York-Newark-Jersey City, NY-NJ	71	4.6%
2	Chicago-Naperville-Elgin, IL-IN	57	3.7%
3	Atlanta-Sandy Springs-Roswell, GA	44	2.9%
4	Charlotte-Concord-Gastonia, NC-SC	40	2.6%
5	Cincinnati, OH-KY-IN	40	2.6%
6	Rural OH	39	2.5%
7	Pittsburgh, PA	37	2.4%
8	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	35	2.3%
9	Columbus, OH	34	2.2%
10	Minneapolis-St. Paul-Bloomington, MN-WI	31	2.0%
11	Akron, OH	30	1.9%
12	Hilton Head Island-Bluffton-Port Royal, SC	29	1.9%
13	Boston-Cambridge-Newton, MA-NH	26	1.7%
14	Dallas-Fort Worth-Arlington, TX	24	1.6%
15	Greenville-Anderson-Greer, SC	23	1.5%
16	Washington-Arlington-Alexandria, DC-VA-MD-WV	22	1.4%
17	Indianapolis-Carmel-Greenwood, IN	20	1.3%
18	Louisville/Jefferson County, KY-IN	20	1.3%
19	Toledo, OH	19	1.2%
20	Myrtle Beach-Conway-North Myrtle Beach, SC	18	1.2%
21	St. Louis, MO-IL	18	1.2%
22	Augusta-Richmond County, GA-SC	17	1.1%
23	Columbia, SC	16	1.0%
24	Grand Rapids-Wyoming-Kentwood, MI	16	1.0%
25	Asheville, NC	15	1.0%
26	Detroit-Warren-Dearborn, MI	14	0.9%
27	Milwaukee-Waukesha, WI	14	0.9%
28	Baltimore-Columbia-Towson, MD	13	0.8%
29	Buffalo-Cheektowaga, NY	13	0.8%
30	Rochester, NY	13	0.8%
	Other	731	47.5%
N		1,539	

Table 6: ZIP Code Analysis – Top 30 MSAs

International Markets

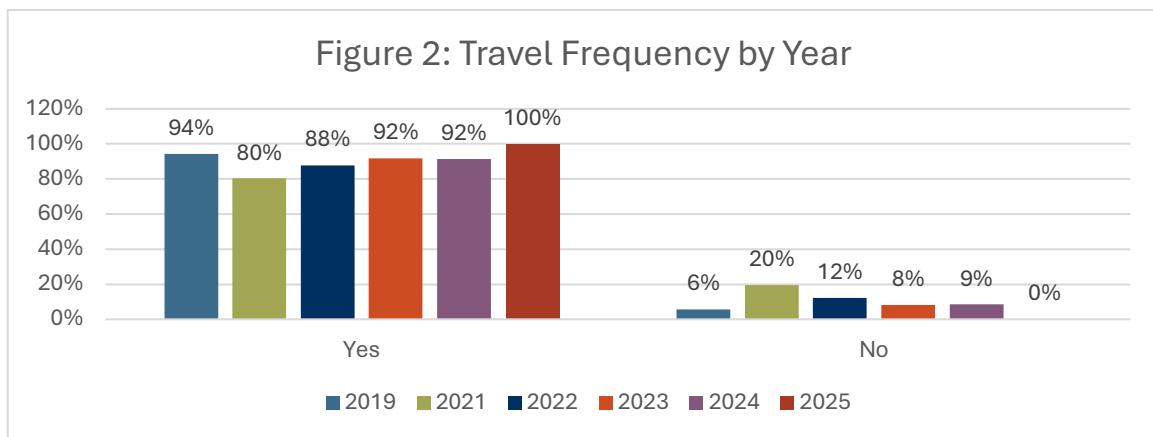


	2019	2021	2022	2023	2024	2025
Canada	52.1%	49.3%	47.8%	38.0%	73.7%	69.2%
Europe	25.4%	17.3%	18.8%	16.9%	10.5%	15.4%
Caribbean	1.4%	4.0%	2.9%	-	10.5%	7.7%
South America	4.2%	2.7%	5.8%	1.4%	5.3%	3.8%
Asia	1.0%	9.3%	4.3%	9.9%	-	3.8%
Australia/Oceania	1.4%	1.3%	5.8%	5.6%	-	-
Africa	2.1%	6.7%	7.2%	1.4%	-	-
Antarctica	-	2.7%	-	-	-	-
Central America	8.5%	1.3%	-	-	-	-
Middle East	-	5.3%	7.2%	26.8%	-	-
N	71	75	69	71	19	26

Table 7: International Markets by Year

TRAVEL TO THE HILTON HEAD ISLAND / BLUFFTON AREA

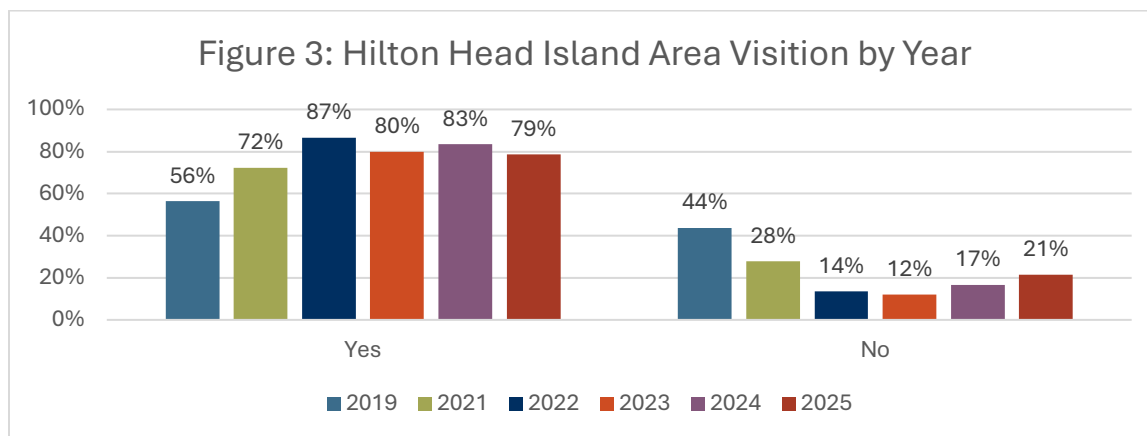
Within the last 12 months have you traveled or taken a vacation?¹



	2019	2021	2022	2023	2024	2025
Yes	94.3%	80.4%	87.8%	91.8%	91.5%	100.0%
No	5.7%	19.6%	12.2%	8.2%	8.5%	-
N	1,684	2,084	2,918	1,710	1,040	1,539

Table 8: Travel Frequency by Year

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



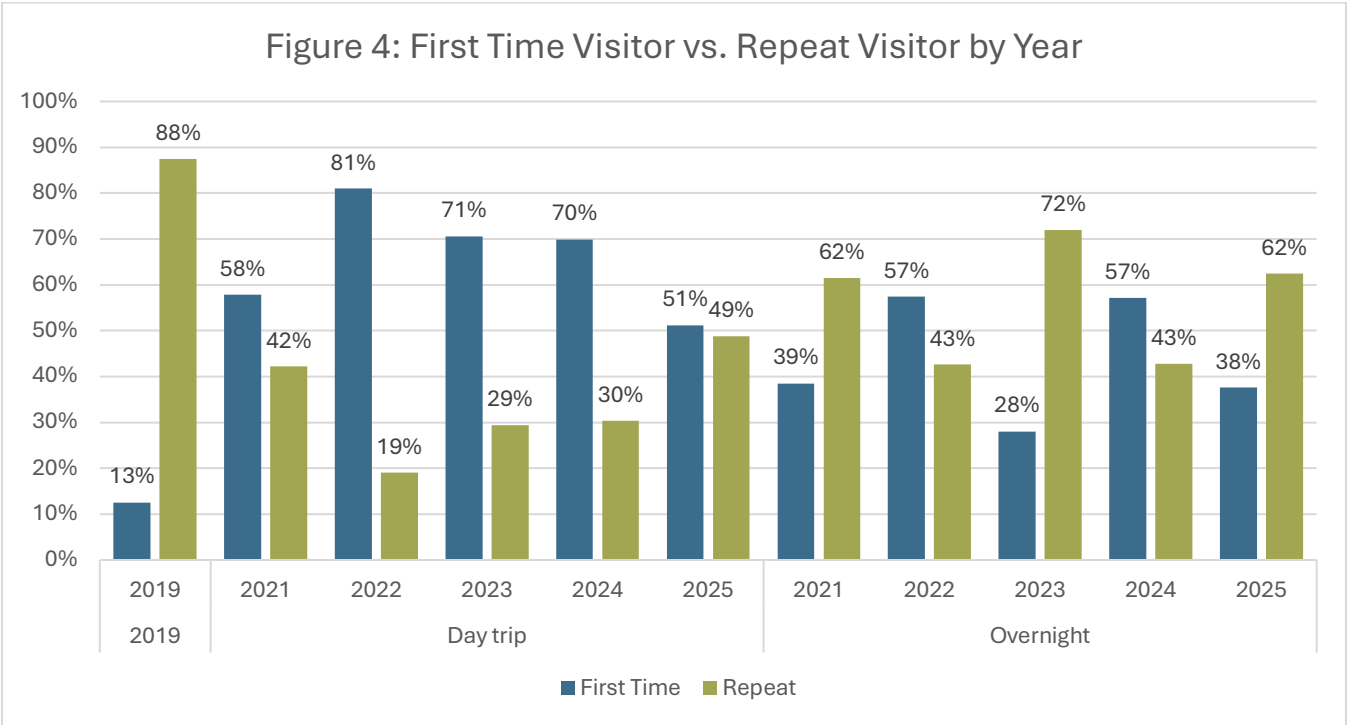
	2019	2021	2022	2023	2024	2025
Yes	56.4%	72.3%	86.5%	79.8%	83.4%	78.6%
No	43.6%	27.7%	13.5%	12.0%	16.6%	21.4%
N	1,713	1,675	2,547	1,570	952	1,539

Table 9: 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 subsequent years it was just asked of those who had travelled.

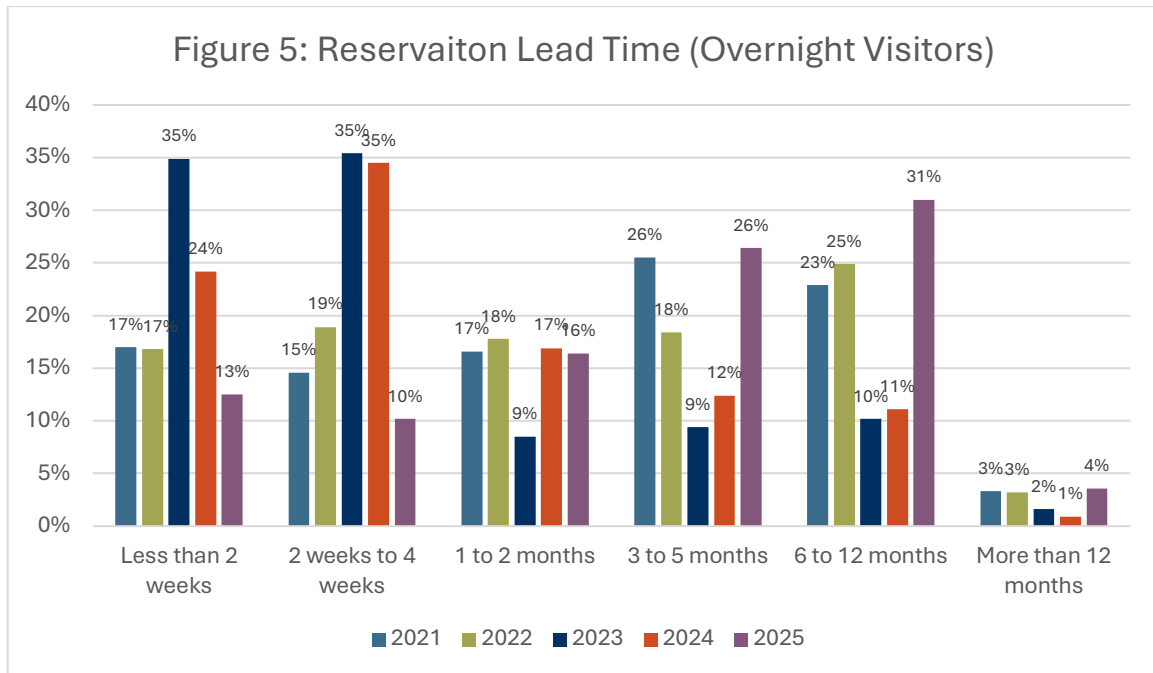
HILTON HEAD ISLAND VISITORS

Was this your first time visiting Hilton Head Island?



	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Yes	12.5%	38.5%	57.8%	57.4%	81.0%	28.0%	70.6%	57.2%	69.9%	37.6%	51.2%
No	87.5%	61.5%	42.2%	42.6%	19.0%	72.0%	29.4%	42.8%	30.4%	62.4%	48.8%
N	946	991	45	1,477	79	1,077	34	547	23	1,043	43

Table 10: First Time Visitors vs. Repeat Visitors by Year

Approximately how long before your trip to Hilton Head Island did you make your first reservation?

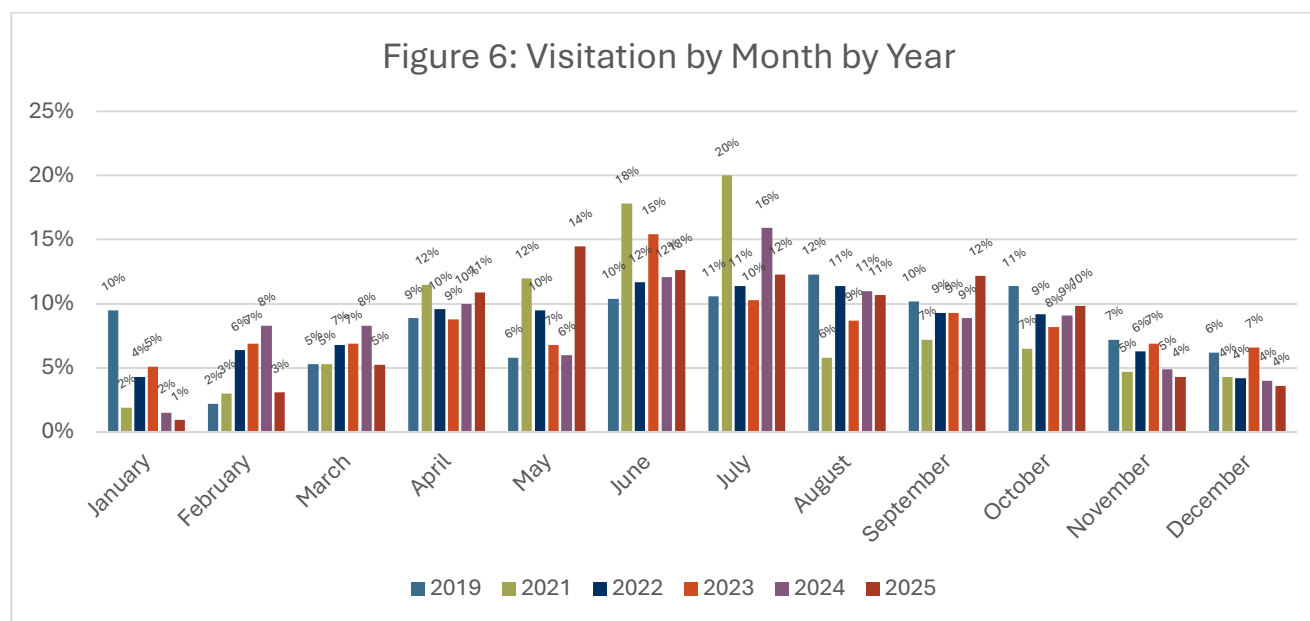
	2021	2022	2023	2024	2025
Less than 2 weeks	17.0%	16.8%	34.9%	24.2%	12.5%
2 weeks to 4 weeks	14.6%	18.9%	35.4%	34.5%	10.2%
1 to 2 months	16.6%	17.8%	8.5%	16.9%	16.4%
3 to 5 months	25.5%	18.4%	9.4%	12.4%	26.4%
6 to 12 months	22.9%	24.9%	10.2%	11.1%	31.0%
More than 12 months	3.3%	3.2%	1.6%	0.9%	3.6%
N	991	1,479	1,076	550	1,036

Table 11: Reservation Lead Time

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

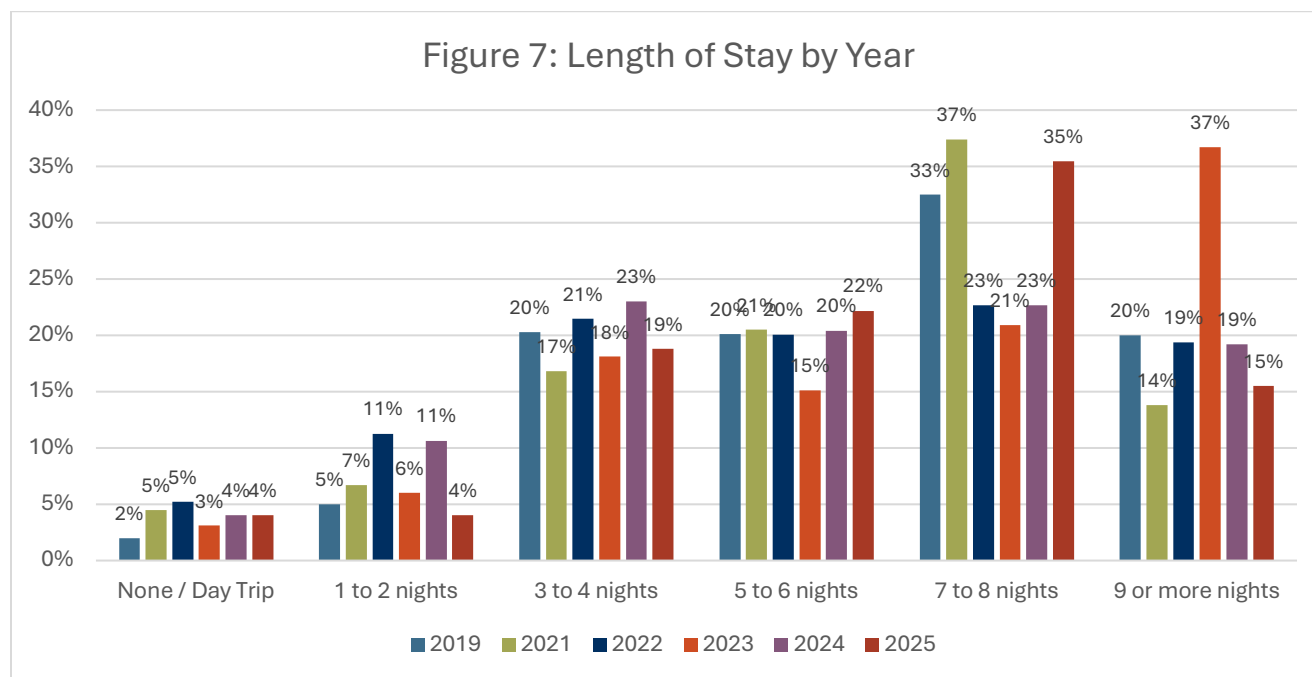
	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
January	9.5%	1.9%	-	4.3%	4.3%	5.1%	3.0%	1.5%	-	0.9%	-
February	2.2%	3.0%	2.9%	6.4%	4.3%	6.9%	-	8.3%	4.8%	3.1%	5.0%
March	5.3%	5.3%	8.6%	6.8%	11.4%	6.9%	3.0%	8.3%	4.8%	5.2%	17.5%
April	8.9%	11.5%	5.7%	9.6%	7.1%	8.8%	15.2%	10.0%	9.5%	10.9%	7.5%
May	5.8%	12.0%	5.7%	9.5%	4.3%	6.8%	12.1%	6.0%	23.8%	14.4%	20.0%
June	10.4%	17.8%	31.4%	11.7%	12.9%	15.4%	18.2%	12.1%	9.5%	12.6%	10.0%
July	10.6%	20.0%	25.7%	11.4%	11.4%	10.3%	12.1%	15.9%	9.5%	12.3%	5.0%
August	12.3%	5.8%	2.9%	11.4%	25.7%	8.7%	12.1%	11.0%	4.8%	10.7%	2.5%
September	10.2%	7.2%	5.7%	9.3%	11.4%	9.3%	6.1%	8.9%	4.8%	12.2%	10.0%
October	11.4%	6.5%	8.6%	9.2%	1.4%	8.2%	9.1%	9.1%	28.6%	9.8%	15.0%
November	7.2%	4.7%	-	6.3%	2.9%	6.9%	-	4.9%	-	4.3%	5.0%
December	6.2%	4.3%	2.9%	4.2%	2.9%	6.6%	9.1%	4.0%	-	3.6%	2.5%
N	951	1,504	34	1,361	70	1,044	33	529	21	976	40

Table 12: 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 and subsequent surveys, data collection occurred on a continuous basis throughout the year.

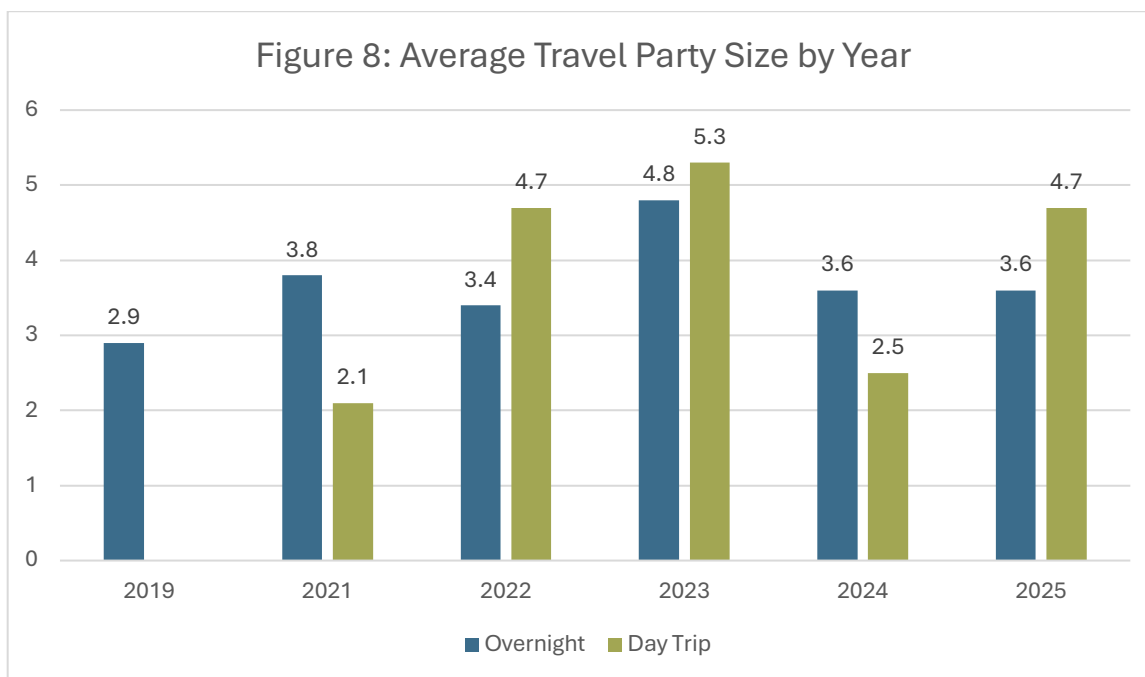
Approximately how many nights was your trip to Hilton Head Island?



	2019	2021	2022	2023	2024	2025
None/day trip only	2.0%	4.5%	5.2%	3.1%	4.0%	4.0%
1 night	1.9%	1.8%	2.4%	0.4%	1.9%	1.1%
2 nights	3.1%	4.9%	8.9%	5.6%	8.7%	2.9%
3 nights	10.3%	7.5%	11.3%	10.2%	11.3%	8.3%
4 nights	10.0%	9.3%	10.2%	7.9%	11.7%	10.4%
5 nights	7.7%	9.6%	10.5%	7.5%	11.5%	9.6%
6 nights	12.4%	10.9%	9.5%	7.6%	8.9%	12.6%
7 nights	30.4%	34.0%	19.3%	15.4%	19.0%	31.5%
8 nights	2.1%	3.4%	3.4%	5.5%	3.7%	3.9%
9 nights	2.3%	2.6%	1.8%	3.7%	3.0%	1.5%
10 nights	3.4%	3.1%	3.2%	3.7%	5.8%	4.0%
11 nights	0.5%	0.4%	1.3%	2.6%	1.6%	0.5%
12 nights	0.8%	0.9%	1.4%	3.7%	1.6%	1.1%
13 nights	0.6%	0.7%	0.8%	2.9%	1.0%	0.8%
14 nights	4.8%	4.2%	3.6%	4.4%	3.5%	3.3%
15 nights	0.5%	0.8%	1.1%	2.9%	0.9%	0.5%
More than 15 nights	7.1%	1.1%	6.2%	12.8%	1.9%	3.8%
N	950	996	1,519	1,103	573	1090

Table 13: Length of Stay by Year

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



	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Average	2.9	3.8	2.1	3.4	4.7	4.8	5.3	3.6	2.5	3.6	4.7
N	951	995	45	1,477	79	1,042	30	551	23	1,044	44

Table 14: Travel Party Size by Year

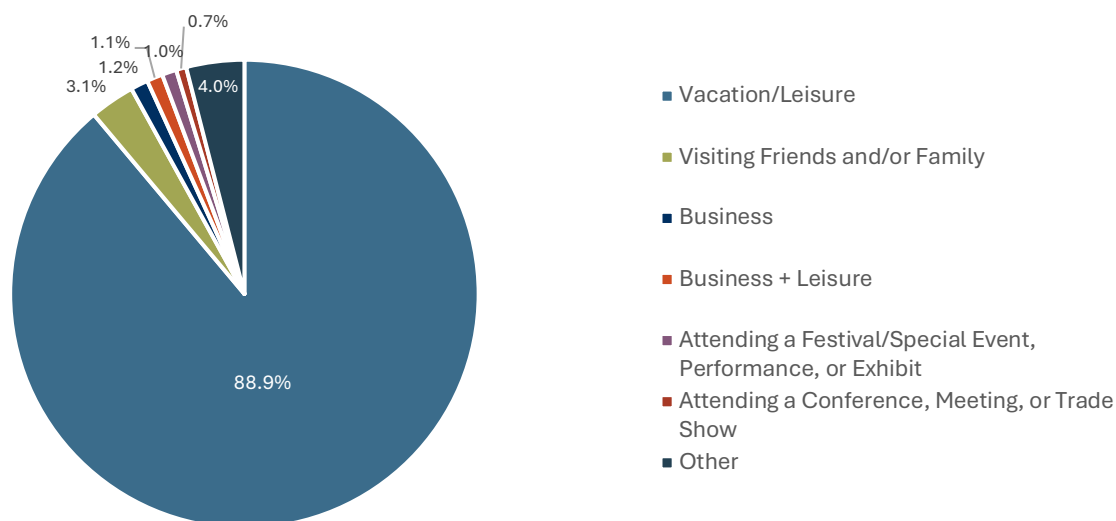
Please indicate by age category how many people were in your travel party.

Age		0	1	2	3	4	5	6 or more
Overnight	Under 18	72.2%	9.0%	10.2%	3.5%	1.3%	1.3%	1.0%
	18-24	87.5%	5.7%	3.5%	1.0%	0.4%	0.1%	0.5%
	25-34	85.2%	5.1%	4.9%	1.6%	0.6%	0.7%	0.6%
	35-44	78.6%	5.7%	10.9%	1.6%	1.2%	0.4%	0.2%
	45-54	77.6%	10.3%	9.2%	0.6%	0.4%	0.5%	0.1%
	55-64	66.6%	14.3%	15.5%	1.0%	0.9%	0.1%	0.3%
	65+	46.0%	15.7%	31.7%	1.7%	2.4%	0.1%	1.0%
Day Trip	Under 18	70.5%	15.9%	2.3%	-	-	4.5%	-
	18-24	77.3%	9.1%	4.5%	-	-	-	2.3%
	25-34	84.1%	4.5%	-	2.3%	-	-	2.3%
	35-44	79.5%	6.8%	4.5%	-	-	-	2.3%
	45-54	63.6%	13.6%	9.1%	4.5%	-	-	2.3%
	55-64	61.4%	11.4%	15.9%	2.3%	-	2.3%	-
	65+	47.7%	11.4%	25.0%	2.3%	2.3%	-	4.5%

Table 15: Travel Party by Age Group

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

Figure 9: Trip Purpose of Overnight Visitors



	2021	2022	2023	2024	2025
Vacation/Leisure	82.1%	74.3%	87.1%	77.1%	88.8%
Visiting Friends and/or Family	3.9%	5.0%	2.7%	4.2%	3.1%
Business	2.1%	5.3%	2.5%	3.8%	1.2%
Business + Leisure	6.7%	6.9%	4.4%	9.8%	1.1%
Attending a Festival/Special Event, Performance, or Exhibit	0.9%	2.5%	0.7%	1.5%	1.0%
Attending a Conference, Meeting, or Trade Show	2.3%	4.2%	1.1%	2.9%	0.7%
Other	1.9%	1.7%	1.4%	0.4%	4.0%
N	995	1,491	1,081	551	1,056

Table 16: Trip Purpose of Overnight Visitors

Day Trip Visitors:

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

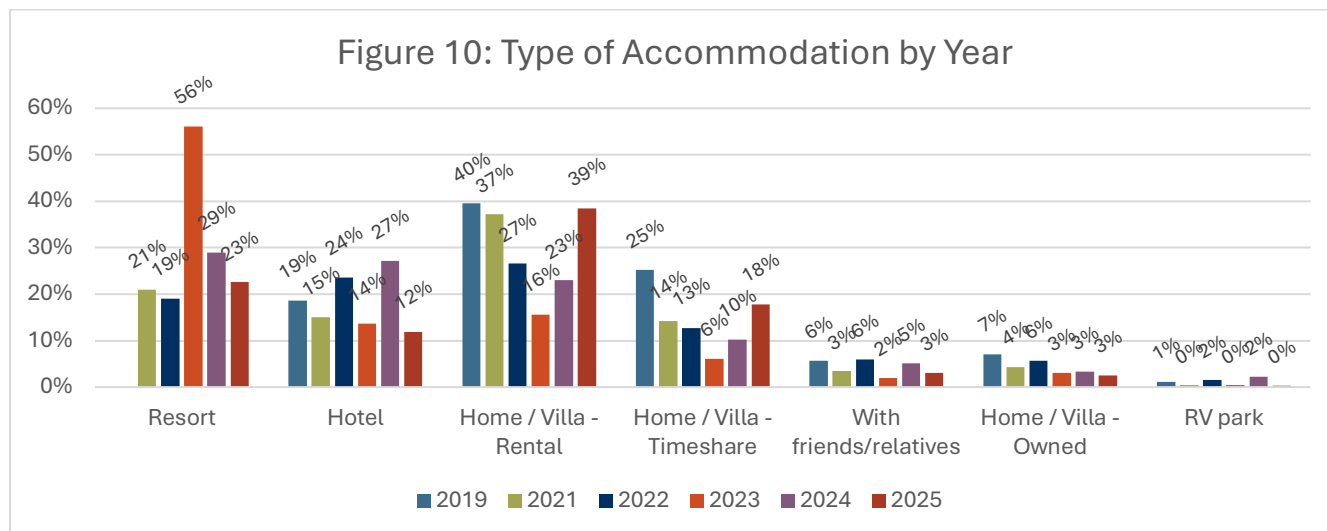
	2021	2022	2023	2024	2025
Part of a vacation	57.8%	72.2%	76.5%	73.9%	79.1%
Day trip from home	42.2%	27.8%	23.5%	26.1%	20.9%
N	45	79	34	15	43

Table 17: Day Trip as Part of a Vacation or Day Trip from Home

Where did you stay overnight?

	2021	2022	2023	2024	2025
Savannah	42.3%	19.3%	23.1%	26.7%	50.0%
Charleston	19.2%	50.9%	26.9%	26.7%	11.8%
Beaufort	19.2%	14.0%	15.4%	6.7%	14.7%
Tybee Island	7.7%	10.5%	19.2%	6.7%	8.8%
Jacksonville	3.8%	3.5%	11.5%	20.0%	-
Fripp Island	3.8%	-	-	-	-
Other	3.8%	1.8%	3.8%	13.3%	-
N	26	57	26	15	29

Table 18: Day Trip Visitors' Overnight Location

Overnight Visitors:**What was your primary form of accommodation while visiting Hilton Head Island?**

	2019	2021	2022	2023	2024	2025
Home / Villa - Rental	39.5%	37.2%	26.6%	15.6%	23.0%	38.5%
Resort	-	20.9%	19.0%	56.1%	29.0%	22.6%
Home / Villa - Timeshare	25.2%	14.2%	12.7%	6.1%	10.2%	17.8%
Hotel	18.6%	15.0%	23.6%	13.7%	27.2%	11.9%
With friends/relatives	5.6%	3.4%	5.9%	2.0%	5.1%	3.0%
Home / Villa - Owned	7.1%	4.3%	5.6%	3.0%	3.3%	2.5%
RV park	1.1%	0.4%	1.5%	0.4%	2.2%	0.3%
Other	1.4%	0.3%	0.1%	-	-	3.4%
N	951	1,040	1,570	1,115	551	1,044

Table 19: Types of Accommodation by Year

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

Hilton Beachfront Resort & Spa	16.2%
Omni Resort	15.0%
Hampton inn	8.3%
Sonesta	7.5%
Beach House Resort	3.8%
Doubletree	3.8%
Holiday Inn Express	3.4%
The Westin	2.6%
HHI Beach & Tennis Resort	2.3%
Marriott Barony Beach	2.3%
N	176

Table 20: Top 10 Hotels or Resorts

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

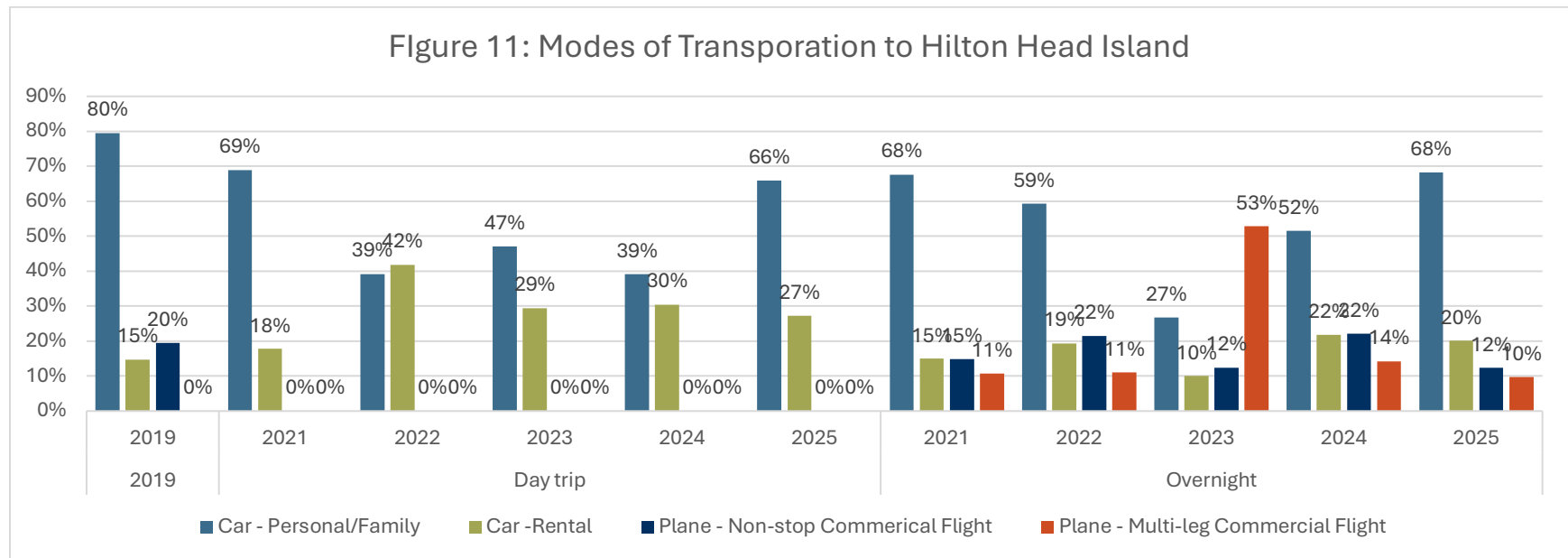
	2019	2021	2022	2023	2024	2025
VRBO	32.8%	34.2%	29.2%	32.3%	22.6%	29.1%
Local company	22.7%	22.9%	24.7%	22.2%	33.6%	25.1%
Airbnb	2.4%	10.0%	12.0%	10.2%	15.8%	14.2%
Directly with the resort	11.2%	15.1%	13.0%	10.8%	17.1%	12.4%
Vacasa	-	4.9%	5.5%	6.6%	3.4%	5.5%
Booking.com	-	0.3%	2.2%	0.6%	1.4%	1.2%
TurnKey	-	1.3%	-	3.0%	2.1%	0.0%
HomeAway	-	2.2%	3.5%	4.2%	0.7%	0.0%
Directly with owner	-	6.2%	6.0%	-	-	0.0%
I don't remember	3.5%	0.8%	3.0%	1.2%	1.4%	2.0%
None	-	0.5%	0.5%	0.6%	2.1%	0.5%
Other	23.5%	1.6%	0.5%	8.4%	-	10.0%
N		371	401	167	146	402

Table 21: Booking Platforms for Home/Villa Rental

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

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Car - Personal/Family	79.50%	67.6%	68.9%	59.3%	39.2%	26.7%	47.1%	51.5%	39.1%	68.3%	65.9%
Car - Rental	14.70%	15.0%	17.8%	19.4%	41.8%	10.0%	29.4%	21.8%	30.4%	20.1%	27.3%
Plane - Non-stop commercial flight	19.5% ²	14.8%	-	21.5%	-	12.4%	-	22.1%	-	12.4%	-
Plane - Multi-leg commercial flight	-	10.7%	-	11.0%	-	52.8%	-	14.2%	-	9.7%	-
Personal RV	1.10%	2.2%	-	4.9%	1.3%	1.9%	17.6%	5.1%	17.4%	1.1%	-
Motor Coach/Tour bus	-	1.5%	6.7%	3.9%	15.2%	5.9%	11.8%	10.0%	21.7%	0.5%	-
Plane - Private	0.20%	0.7%	13.3%	3.4%	10.1%	1.5%	17.6%	2.2%	21.7%	0.3%	2.3%
Other	0.60%	0.6%	-	0.1%	-	0.2%	-	0.2%	-	1.2%	2.3%
N	953	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 22: Modes of Transportation to Hilton Head Island



² The 2019 survey did not divide commercial flights into non-stop and multi-leg, so the stated percentage is for all commercial flights.

Visitors Arriving by Plane:**At which airport did you land?**

	2019	2021	2022	2023	2024	2025
Hilton Head Island	12.8%	39.8%	33.8%	81.6%	31.7%	50.5%
Savannah/Hilton Head Island International	69.5%	40.6%	38.1%	12.1%	56.5%	40.7%
Charleston	9.2%	8.8%	12.7%	3.3%	5.3%	3.6%
Atlanta	2.8%	5.6%	6.1%	1.4%	-	2.6%
Jacksonville	1.4%	2.0%	5.5%	1.1%	2.8%	1.0%
Charlotte	1.4%	2.0%	3.3%	0.3%	2.0%	0.8%
Other	2.8%	1.2%	0.4%	0.3%	2.0%	0.8%
N	114	251	488	728	246	386

Table 23: Arrival Airport by Year

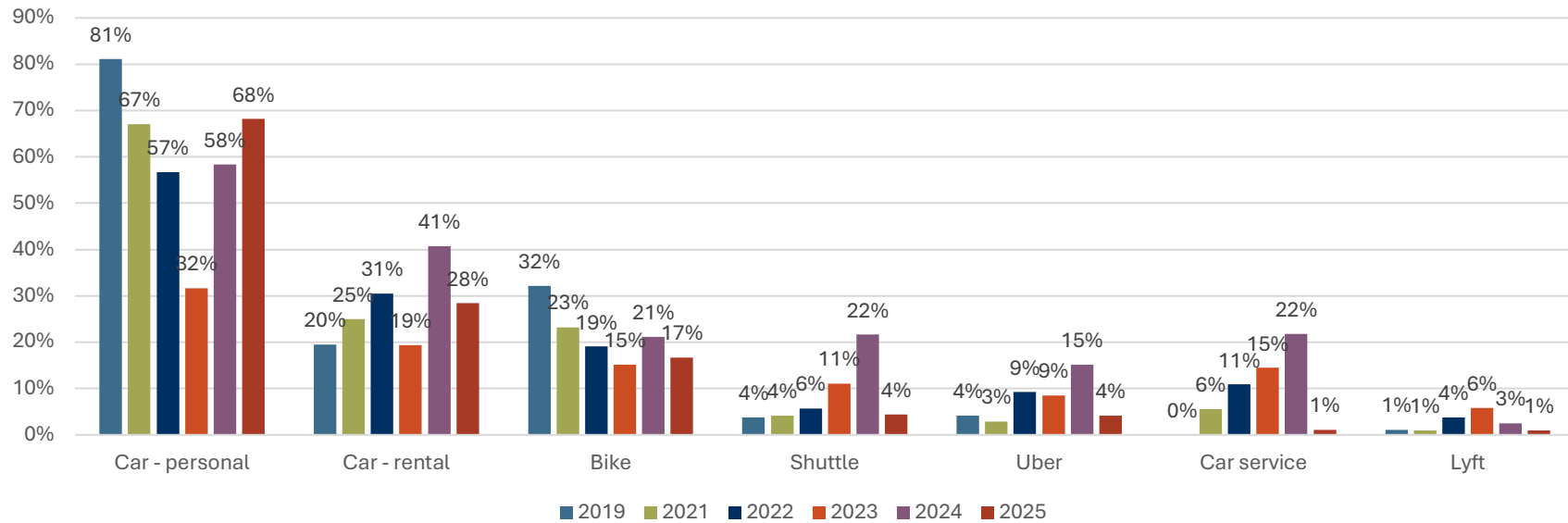
Which commercial airline did you use?

	2021	2022	2023	2024	2025
American Airlines	38.9%	44.8%	25.4%	59.3%	30.7%
Delta	16.6%	7.0%	2.6%	3.3%	18.9%
Southwest	8.1%	9.0%	14.2%	7.5%	18.9%
JetBlue	6.5%	3.6%	12.2%	3.3%	8.8%
Allegiant	10.1%	8.1%	2.1%	3.3%	3.5%
Breeze	1.2%	3.2%	1.4%	2.5%	3.1%
Alaska	2.8%	10.4%	1.7%	8.3%	0.9%
Frontier	1.6%	2.3%	11.9%	2.9%	0.9%
Silver Airways	0.8%	1.8%	14.2%	1.2%	0.9%
Sun Country Airlines	0.4%	0.9%	0.1%	-	0.9%
Air Canada	5.3%	6.8%	12.8%	7.5%	0.0%
Spirit	0.4%	0.2%	-	-	0.0%
United	6.9%	1.8%	-	0.8%	0.0%
Other	-	-	-	-	12.7%
N	247	442	720	241	228

Table 24: Commercial Airlines Used

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

Figure 12: Transportation used while on Hilton Head Island



	2019	2021	2022	2023	2024	2025
Car - personal	81.1%	67.1%	56.7%	31.7%	58.3%	68.2%
Car - rental	19.5%	25.0%	30.5%	19.4%	40.7%	28.4%
Bike	32.2%	23.2%	19.1%	15.2%	21.2%	16.7%
Shuttle offered by the hotel/resort	3.7%	4.2%	5.7%	11.1%	21.6%	4.4%
Uber	4.1%	2.9%	9.2%	8.5%	15.1%	4.1%
Public transportation (HHI Trolley, etc.)	5.4%	5.4%	6.8%	12.5%	23.4%	3.9%
Car service	-	5.5%	10.9%	14.5%	21.8%	1.1%
On Foot	-	1.4%	1.3%	0.8%	-	1.2%
Lyft	1.1%	1.0%	3.7%	5.8%	2.5%	0.9%
Other	-	0.1%	0.1%	-	0.7%	1.4%
N	948	995	1,477	1,115	551	1,044

Table 25: Transportation Used While on Hilton Head Island

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	\$266	\$413	\$344	\$217	\$186	\$70	\$327
Lodging	\$3,225	\$1,372	\$1,417	\$0	\$0	\$0	\$2,242
Food - Dining	\$785	\$573	\$578	\$406	\$315	\$213	\$630
Food - Grocery	\$274	\$202	\$210	\$238	\$164	\$83	\$234
Shopping	\$353	\$382	\$322	\$334	\$409	\$190	\$353
Spas	\$145	\$164	\$100	\$80	\$65	\$50	\$147
Golf	\$374	\$305	\$164	\$67	\$58	\$30	\$284
Biking	\$145	\$113	\$30	\$20	\$20	\$10	\$105
Performance/Visual Arts	\$147	\$145	\$48	\$50	\$50	\$50	\$120
Festivals	\$86	\$84	\$19	\$50	\$46	\$60	\$70
Museums/Historical Tours	\$99	\$185	\$49	\$25	\$25	\$114	\$125
Boating/Sailing/Fishing	\$278	\$249	\$166	\$65	\$70	\$10	\$238
Nature-based Activities	\$89	\$106	\$10	\$70	\$44	\$30	\$87
Dolphin Tours	\$115	\$119	\$48	\$30	\$30	\$57	\$104
Tennis	\$78	\$82	\$50	\$25	\$40	\$20	\$69
Other Expenses	\$152	\$146	\$89	\$96	\$57	\$30	\$134
Total Expenditure	\$4,688	\$2,681	\$2,079	\$1,063	\$979	\$444	\$3,168

Table 26: 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		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Beaches	73.5%	75.4%	55.6%	62.0%	38.0%	40.7%	44.1%	61.9%	47.8%	76.0%	51.2%
Relaxation	58.6%	51.5%	31.1%	34.1%	12.7%	31.7%	20.6%	31.8%	13.0%	61.4%	46.5%
Time with family/friends	48.4%	46.6%	24.4%	32.6%	10.1%	22.2%	26.5%	32.1%	34.8%	46.6%	34.9%
Culinary	13.9%	12.2%	31.1%	14.2%	27.8%	14.3%	20.6%	8.3%	8.7%	16.1%	9.3%
Biking	15.7%	16.4%	11.1%	21.3%	27.8%	17.4%	11.8%	17.1%	21.7%	13.2%	4.7%
Shopping	11.7%	10.9%	24.4%	10.7%	8.9%	14.3%	20.6%	11.1%	8.7%	10.5%	37.2%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	11.3%	12.0%	2.2%	13.3%	3.8%	19.5%	23.5%	22.9%	0.0%	10.4%	9.3%
Golf	16.3%	13.7%	8.9%	10.4%	13.9%	14.1%	2.9%	11.3%	8.7%	8.0%	4.7%
Heritage attractions / Museum / Historical tours	3.3%	6.5%	20.0%	10.6%	16.5%	6.1%	32.4%	13.4%	17.4%	6.9%	0.0%
Boating / Sailing / Kayaking	1.6%	7.5%	11.1%	13.6%	16.5%	12.3%	26.5%	22.5%	8.7%	4.7%	0.0%
Parks	1.4%	1.8%	6.7%	4.9%	5.1%	11.1%	2.9%	5.6%	4.3%	3.2%	4.7%
Health/wellness/fitness	2.1%	3.4%	11.1%	5.9%	6.3%	13.1%	8.8%	5.8%	0.0%	3.1%	0.0%
Festivals	4.0%	3.6%	6.7%	8.2%	3.8%	11.6%	8.8%	10.0%	4.3%	2.3%	4.7%
Tennis	2.1%	1.7%	6.7%	2.6%	11.4%	3.9%	2.9%	2.4%	4.3%	2.2%	0.0%
Attend sporting event	0.6%	4.7%	15.6%	11.2%	10.1%	11.3%	2.9%	7.8%	4.3%	2.1%	0.0%
Business trip (convention, meeting, etc.)	1.2%	5.1%	4.4%	10.5%	24.1%	13.1%	2.9%	11.3%	13.0%	1.2%	2.3%
Wedding	-	1.2%	-	1.6%	-	0.9%	2.9%	2.7%	0.0%	0.9%	0.0%
Other	8.1%	4.1%	-	3.9%	2.5%	1.8%	5.9%	2.2%	8.7%	8.4%	9.3%
N	953	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 27: Three Primary Reasons for Visitation

Which of the following activities did you actively participate in?

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Beaches	83.2%	81.8%	42.2%	69.4%	51.9%	46.0%	44.1%	67.5%	30.4%	87.2%	55.8%
Relaxation	78.0%	68.7%	40.0%	45.6%	15.2%	28.1%	8.8%	42.1%	26.1%	80.2%	46.5%
Shopping	69.1%	58.1%	46.7%	42.3%	13.9%	25.9%	29.4%	50.1%	26.1%	67.2%	58.1%
Time with family/friends	70.5%	59.0%	37.8%	40.8%	20.3%	25.1%	20.6%	40.3%	39.1%	64.1%	32.6%
Culinary	40.1%	29.1%	31.1%	27.5%	16.5%	14.3%	20.6%	21.8%	4.3%	36.7%	23.3%
Biking	37.3%	40.5%	6.7%	38.4%	24.1%	31.2%	17.6%	36.7%	30.4%	31.6%	7.0%
Nature-based activities (dolphin/turtle tours, fishing, etc.)	30.3%	26.3%	8.9%	24.6%	7.6%	14.9%	23.5%	33.0%	21.7%	29.0%	14.0%
Museum / Historical tours	17.8%	15.7%	11.1%	17.9%	8.9%	9.9%	14.7%	24.3%	21.7%	20.9%	0.0%
Water excursions	24.4%	17.6%	17.8%	11.3%	29.1%	17.8%	17.6%	19.4%	17.4%	15.2%	7.0%
Golf	23.8%	18.7%	8.9%	14.6%	6.3%	6.7%	5.9%	18.5%	4.3%	12.6%	0.0%
Health / Wellness / Fitness	12.6%	12.8%	4.4%	14.8%	12.7%	7.8%	14.7%	15.4%	0.0%	10.4%	0.0%
Music or theatrical performance / Visual arts exhibit	16.7%	6.2%	8.9%	10.4%	3.8%	6.5%	8.8%	14.7%	13.0%	8.6%	0.0%
Festivals	13.4%	6.5%	6.7%	12.1%	8.9%	5.8%	17.6%	16.2%	13.0%	7.5%	9.3%
Tennis	5.9%	4.9%	-	3.2%	1.3%	3.9%	2.9%	5.8%	4.3%	4.8%	2.3%
Sports activities	8.1%	4.4%	8.9%	5.8%	5.1%	2.8%	91.2%	8.0%	4.3%	4.3%	2.3%
Attend sporting event	2.3%	4.9%	8.9%	13.5%	16.5%	15.3%	11.8%	7.3%	13.0%	3.3%	2.3%
Spas	8.0%	5.1%	6.7%	9.5%	5.1%	3.9%	5.9%	13.1%	4.3%	3.1%	0.0%
Business/work	2.5%	7.1%	13.3%	11.8%	11.4%	5.4%	2.9%	15.1%	13.0%	1.9%	2.3%
University visit / Education / Intellectual programs	0.6%	1.4%	2.2%	2.0%	1.3%	1.6%	2.9%	3.3%	0.0%	1.1%	0.0%
Other	3.9%	2.0%	-	2.6%	6.3%	1.8%	5.9%	1.3%	17.4%	6.6%	2.3%
N	950	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 28: Activities Visitors Participated In

Which shopping locations did you visit?

	2019	2021		2022		2023		2024		2025	
		Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip	Overnight	Day trip
Coligny Plaza	68.8%	64.7%	26.7%	54.4%	32.9%	31.6%	23.5%	47.0%	13.0%	70.6%	30.2%
Harbour Town	60.2%	55.8%	26.7%	44.2%	39.2%	29.2%	23.5%	39.0%	13.0%	59.5%	18.6%
Shelter Cove Harbour	47.8%	42.0%	17.8%	36.9%	21.5%	23.0%	20.6%	29.0%	13.0%	47.7%	14.0%
Shelter Cove Towne Centre	40.4%	33.4%	20.0%	25.0%	8.9%	21.2%	29.4%	30.3%	13.0%	37.9%	2.3%
Tanger Outlets	53.2%	34.9%	37.8%	26.1%	22.8%	19.6%	5.9%	20.5%	8.7%	32.4%	16.3%
The Shops at Sea Pines Center	32.6%	30.3%	8.9%	25.5%	6.3%	18.1%	35.3%	26.0%	26.1%	31.7%	7.0%
Shopping areas off 278 (Target, Kroger, Best Buy, etc.)	42.0%	30.7%	22.2%	21.7%	20.3%	18.3%	20.6%	19.6%	8.7%	31.0%	14.0%
Downtown Bluffton	30.5%	25.4%	28.9%	31.1%	34.2%	20.4%	38.2%	40.5%	52.2%	25.5%	41.9%
Main Street Village	25.0%	20.2%	8.9%	24.6%	25.3%	14.9%	20.6%	26.0%	4.3%	20.2%	16.3%
South Beach Marina	25.2%	21.5%	11.1%	17.7%	15.2%	14.9%	23.5%	22.0%	13.0%	14.7%	4.7%
Village at Wexford	16.4%	10.9%	6.7%	12.8%	11.4%	10.9%	11.8%	12.7%	8.7%	9.4%	4.7%
Buckwalter shopping areas	2.9%	4.9%	11.1%	8.3%	10.1%	10.1%	8.8%	14.9%	13.0%	1.8%	4.7%
Other	5.5%	2.1%	2.2%	2.3%	1.3%	2.1%	67.6%	-	-	5.2%	14.0%
None	2.1%	1.5%	2.2%	0.7%	1.3%	0.7%	23.5%	1.3%	8.7%	1.3%	11.6%
N	950	995	45	1,477	79	1,115	34	551	23	1,044	43

Table 29: Shopping Locations Visited

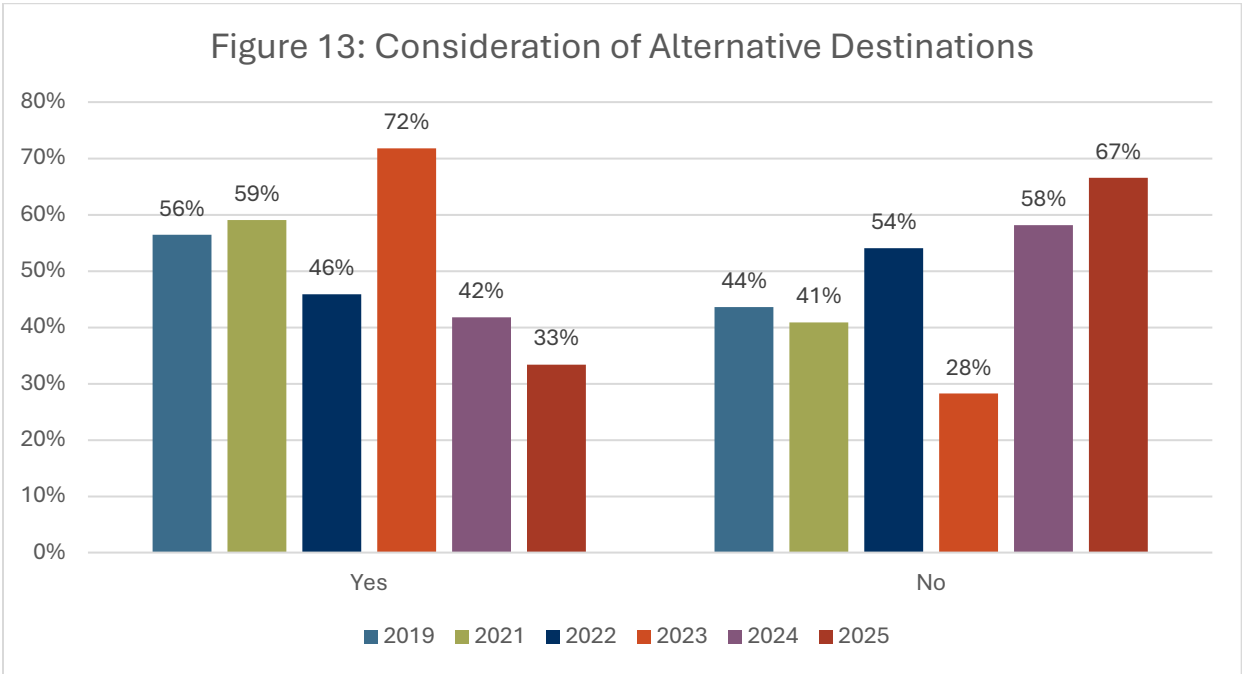
Did you visit any of the following cities while staying on Hilton Head Island?

	2021	2022	2023	2024	2025
Bluffton	37.0%	37.4%	66.2%	45.0%	38.3%
Savannah	29.3%	26.0%	16.0%	23.2%	34.3%
Beaufort	17.7%	23.2%	9.4%	19.8%	17.7%
Charleston	15.7%	20.8%	10.5%	23.6%	13.9%
Daufuskie Island	13.0%	17.1%	7.8%	18.7%	6.1%
Tybee Island	7.3%	10.0%	51.1%	16.5%	6.0%
Jacksonville	5.4%	11.3%	4.8%	15.6%	1.7%
Other	0.9%	0.5%	0.9%	0.5%	32.3%
I did not visit any other cities.	28.8%	20.1%	12.2%	18.0%	30.6%
N	995	1,477	1,115	551	1,044

Table 30: Other Cities Visited While on Hilton Head Island

TRAVEL PLANNING

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



	2019	2021	2022	2023	2024	2025
Yes	56.4%	59.1%	45.9%	71.8%	41.8%	33.4%
No	43.6%	40.9%	54.1%	28.2%	58.2%	66.6%
N	1,691	1,039	1,570	1,114	574	1,084

Table 31: Consideration of Alternative Destinations by Year

Which of the following destinations did you consider visiting?

	2019	2021	2022	2023	2024	2025
Savannah, GA	33.9%	20.0%	19.3%	11.3%	22.6%	29.7%
Charleston, SC	45.2%	24.2%	19.3%	8.5%	21.3%	28.9%
Myrtle Beach, SC	37.5%	20.5%	12.9%	7.0%	10.1%	28.6%
Outer Banks, NC	22.6%	28.9%	20.0%	12.3%	27.5%	26.9%
Tybee Island, GA	18.2%	14.6%	8.8%	6.3%	7.0%	18.4%
Orlando, FL	12.1%	19.3%	15.0%	9.5%	18.5%	17.0%
Gulf Shores, AL	14.9%	19.8%	28.1%	18.3%	26.1%	15.6%
Other	11.3%	13.2%	13.6%	12.4%	16.7%	14.7%
Sanibel Island, FL	13.7%	13.4%	13.8%	7.5%	15.7%	13.9%
The Florida Keys	19.4%	12.5%	8.5%	11.6%	7.7%	13.9%
Caribbean	12.5%	23.1%	20.4%	12.1%	29.6%	11.3%
Tampa/St. Petersburg, FL	10.1%	9.6%	6.5%	6.3%	8.7%	11.3%
Isle of Palms, SC	12.5%	18.1%	16.1%	6.9%	22.6%	10.5%
Jekyll Island, GA	12.5%	13.2%	10.1%	10.4%	11.1%	10.5%
Marco Island/Naples, FL	12.1%	14.4%	18.2%	11.8%	12.9%	9.6%
Kiawah Island, SC	14.1%	15.5%	10.8%	7.5%	13.9%	8.8%
Sarasota, FL	6.9%	7.3%	9.6%	6.9%	10.5%	8.5%
St. Simons Island, GA	-	10.1%	10.4%	7.6%	10.8%	8.2%
Hawaiian Islands	4.8%	15.8%	24.4%	14.4%	29.3%	7.1%
Sandestin, FL	8.5%	9.2%	13.1%	8.4%	12.5%	4.8%
Bluffton, SC	-	1.9%	4.4%	1.5%	5.2%	3.7%
Sea Island, GA	4.8%	10.4%	12.5%	9.4%	14.6%	3.4%
Napa/Sonoma, CA	2.8%	8.5%	8.9%	6.4%	11.8%	2.8%
Santa Fe, NM	1.6%	2.8%	4.0%	5.4%	7.0%	2.8%
Pinehurst, NC	3.2%	9.9%	12.2%	7.0%	9.8%	2.3%
Aspen, CO	2.0%	11.5%	10.1%	10.4%	13.2%	2.0%
Reynolds Plantation, GA	1.2%	8.9%	10.7%	8.3%	12.5%	1.7%
Telluride, CO	0.8%	7.8%	12.4%	10.3%	12.5%	1.4%
Alabama Golf Trail	1.6%	23.8%	31.9%	15.1%	27.5%	1.1%
Ponte Vedre, FL	3.6%	8.5%	8.9%	5.5%	12.9%	1.1%
Total	248	425	720	800	278	353

Table 32: Alternative Destinations by Year

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

	2019	2021	2022	2023	2024	2025
Had visited in the past and wanted to return.	80.3%	60.0%	42.5%	20.4%	40.6%	56.8%
Wanted to visit a beach destination.	48.3%	49.7%	45.7%	32.6%	52.3%	50.2%
Wanted to visit someplace new.	8.6%	18.1%	17.8%	10.6%	29.1%	24.0%
It was recommended by friends/family.	18.2%	24.1%	26.2%	12.2%	40.8%	23.7%
Wanted to visit some place within driving distance.	22.7%	23.9%	19.4%	7.9%	18.5%	22.8%
Wanted to visit because of the nature-based attractions.	10.9%	14.5%	23.3%	23.4%	39.9%	11.3%
Wanted to visit heritage attractions.	4.6%	7.8%	20.3%	18.2%	32.6%	6.0%
Discovered/learned about it on the internet/display ads/search engines.	3.0%	7.5%	10.1%	4.7%	19.2%	4.6%
Saw an advertisement in a magazine or website/social media about the area.	2.1%	4.0%	9.9%	4.4%	18.3%	3.7%
Safe place to visit during or after COVID-19 pandemic.	-	19.0%	9.3%	4.2%	7.8%	2.9%
Wanted to attend a cultural/performing arts event.	1.9%	2.7%	6.3%	3.2%	14.1%	2.8%
Wanted to attend a sporting event.	1.7%	2.9%	4.3%	1.9%	6.6%	1.2%
Other	14.2%	8.5%	5.1%	2.9%	6.6%	12.2%
N	953	1,039	1,570	1,288	574	1,084

Table 33: Reasons for Visiting Hilton Head Island

How likely are you to return to Hilton Head Island?

	2021	2022	2023	2024	2025
Very likely	74.3%	62.7%	44.4%	53.7%	69.9%
Likely	15.0%	22.5%	24.3%	30.4%	18.3%
Neutral	7.6%	9.5%	17.2%	12.6%	6.8%
Unlikely	1.9%	3.7%	13.4%	2.2%	3.3%
Very Unlikely	1.3%	1.7%	0.6%	1.0%	1.7%
N	1,027	1,510	1,027	574	1,051

Table 34: Likelihood of Visiting Hilton Head Island Again

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

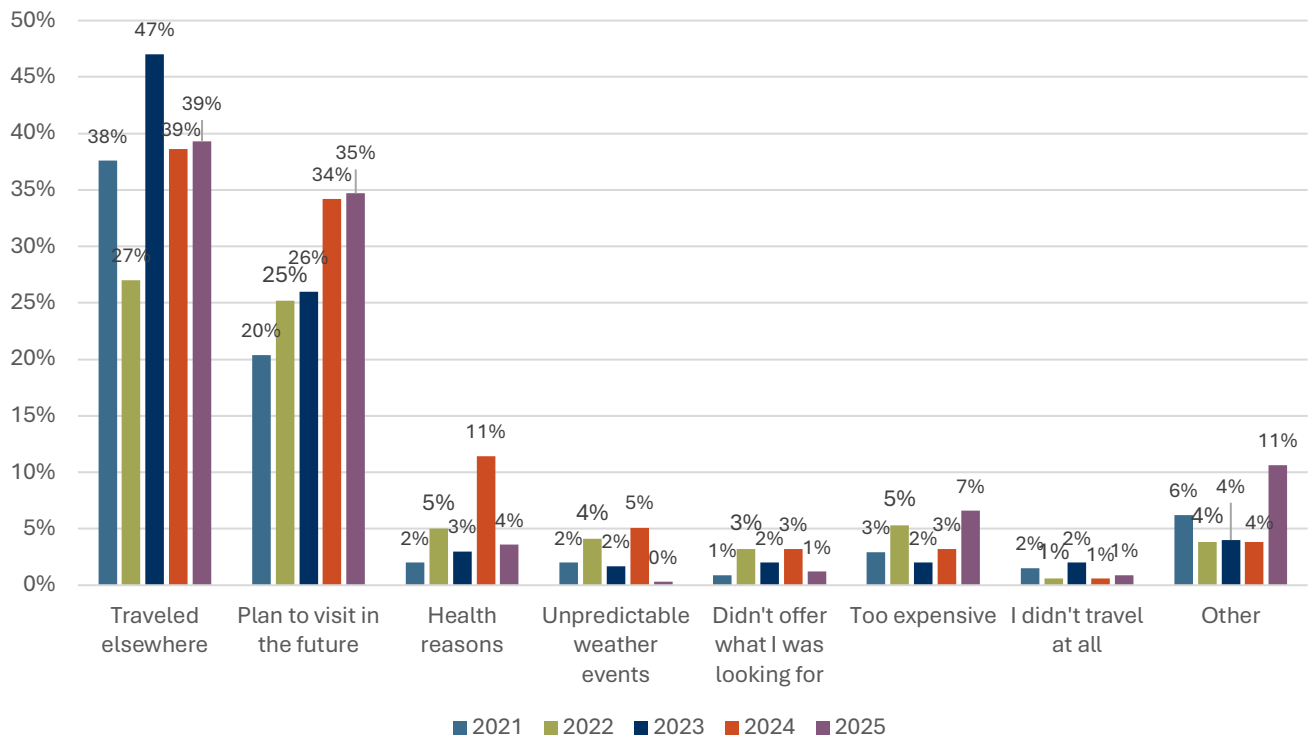
	2021	2022	2023	2024	2025
Definitely Recommend	79.7%	70.2%	48.4%	65.6%	79.7%
Probably Recommend	14.9%	21.8%	22.8%	23.4%	12.4%
May or May Not Recommend	4.9%	6.2%	14.1%	9.0%	4.3%
Probably Not Recommend	0.5%	1.5%	14.4%	1.6%	1.3%
Definitely Not Recommend	-	0.2%	0.2%	0.3%	0.6%
N	1,034	1,522	1,039	574	1,071

Table 35: 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?

Figure 14: Reason for Not Visiting



	2021	2022	2023	2024	2025
Traveled elsewhere	37.6%	27.0%	47.0%	38.6%	39.3%
Plan to visit in the future	20.4%	25.2%	26.0%	34.2%	34.7%
Too expensive	2.9%	5.3%	2.0%	3.2%	6.6%
Health reasons	2.0%	5.0%	3.0%	11.4%	3.6%
Didn't offer what I was looking for	0.9%	3.2%	2.0%	3.2%	1.2%
Unpredictable weather events	2.0%	4.1%	1.7%	5.1%	0.3%
I didn't travel at all	1.5%	0.6%	2.0%	0.6%	0.9%
Other	6.2%	3.8%	4.0%	3.8%	10.6%
COVID-19 pandemic	26.5%	25.8%	7.0%	-	0.3%
N	860	341	100	158	331

Table 36: Reasons for Not Visiting

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

	2021	2022	2023	2024	2025
USA - Southeast (GA, FL, NC, SC)	26.9%	33.7%	42.0%	34.4%	48.9%
USA - West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)	9.8%	19.6%	22.0%	25.5%	24.2%
USA - Midwest (IA, IN, IL, KS, MI, MN, MO, ND, NE, OH, SD, WI)	10.5%	20.8%	17.0%	14.0%	23.3%
USA - South (AL, AR, KY, LA, MS, OK, TN, TX)	9.0%	22.3%	27.0%	23.6%	19.0%
USA - Northeast (CT, MA, ME, NJ, NH, NY, PA, RI, VT)	9.1%	18.5%	24.0%	33.1%	14.2%
Europe	1.2%	7.3%	10.0%	14.6%	11.5%
USA - South Atlantic (DE, DC, MD, VA, WV)	8.0%	17.0%	16.0%	14.6%	10.3%
Latin America and Caribbean	2.1%	6.5%	6.0%	12.1%	8.2%
Canada	1.4%	10.9%	16.0%	16.6%	7.9%
Asia	0.5%	4.4%	8.0%	12.1%	0.9%
Africa	0.3%	1.2%	1.0%	2.5%	0.6%
Australia/New Zealand	0.2%	3.2%	6.0%	5.1%	0.0%
N	860	341	100	157	331

Table 37: Regions Visited by Non-Visitors in the Past 12 Months

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

	2021	2022	2023	2024	2025
Never visited	38.9%	42.9%	33.7%	29.7%	53.5%
1	18.6%	14.0%	9.5%	16.3%	14.5%
2 to 5	30.2%	36.4%	40.8%	45.5%	25.1%
6 to 10	9.8%	5.0%	13.6%	6.5%	4.8%
11 to 20	1.9%	0.9%	1.2%	1.6%	0.3%
21 or more	0.9%	0.5%	1.2%	0.4%	0.3%
N	860	341	169	246	331

Table 38: 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	2025
Yes, within one year	49.2%	50.1%	48.8%	36.7%	51.1%
Yes, but not sure when	42.5%	49.0%	47.0%	55.9%	39.9%
No	8.3%	0.9%	4.2%	36.7%	6.9%
N	859	341	168	245	331

Table 39: Plans of visiting Hilton Head Island-Bluffton in the Future by Non-Visitors

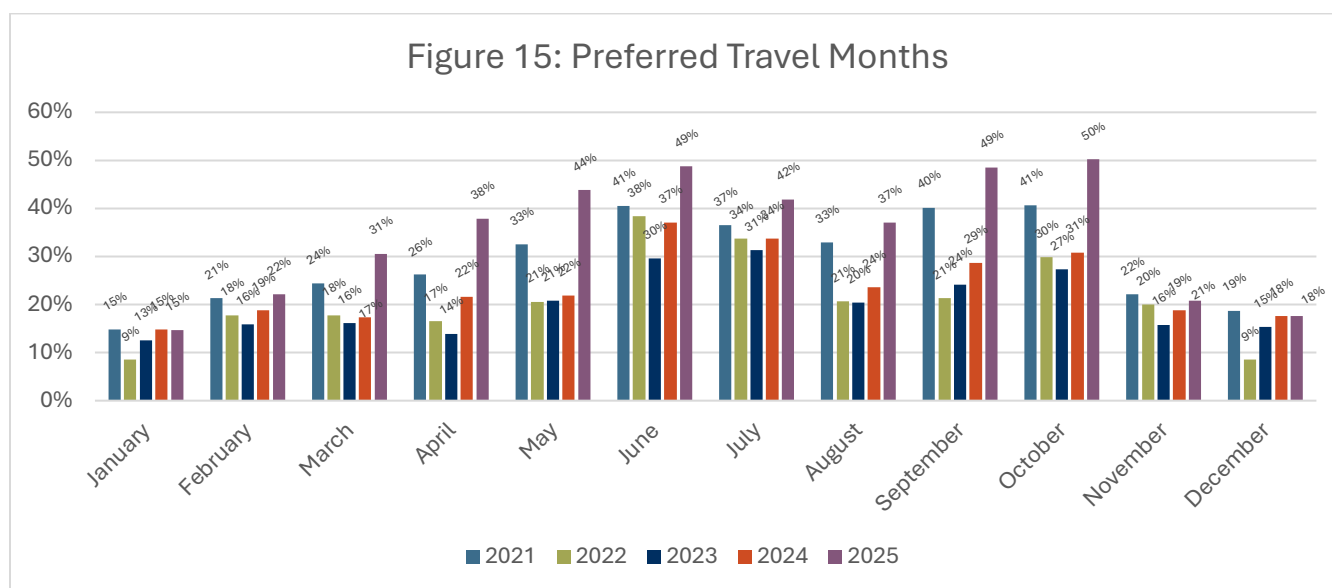
TRAVEL BEHAVIOR – ALL RESPONDENTS

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

	2021	2022	2023	2024	2025
0 to 1	15.3%	10.0%	7.3%	11.7%	10.1%
2 to 4	55.1%	47.3%	50.6%	57.8%	59.4%
5 to 7	19.2%	29.9%	23.4%	18.8%	19.6%
8 to 10	6.3%	8.2%	15.8%	8.7%	5.9%
More than 10	4.1%	4.7%	2.9%	3.0%	5.1%
N	1,042	984	1,625	1,025	1,521

Table 40: Frequency of Leisure/Vacation Trips

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



	2021	2022	2023	2024	2025
January	14.8%	8.5%	12.6%	14.8%	14.7%
February	21.3%	17.8%	15.9%	18.8%	22.2%
March	24.4%	17.7%	16.1%	17.4%	30.5%
April	26.2%	16.5%	13.9%	21.6%	37.9%
May	32.5%	20.5%	20.8%	21.9%	43.8%
June	40.5%	38.4%	29.6%	37.1%	48.8%
July	36.5%	33.7%	31.3%	33.7%	41.9%
August	32.9%	20.7%	20.4%	23.6%	37.1%
September	40.1%	21.4%	24.1%	28.7%	48.5%
October	40.6%	29.8%	27.3%	30.8%	50.2%
November	22.2%	20.0%	15.8%	18.8%	20.8%
December	18.7%	8.5%	15.3%	17.6%	17.6%
N	1,042	984	1,625	1,040	1,521

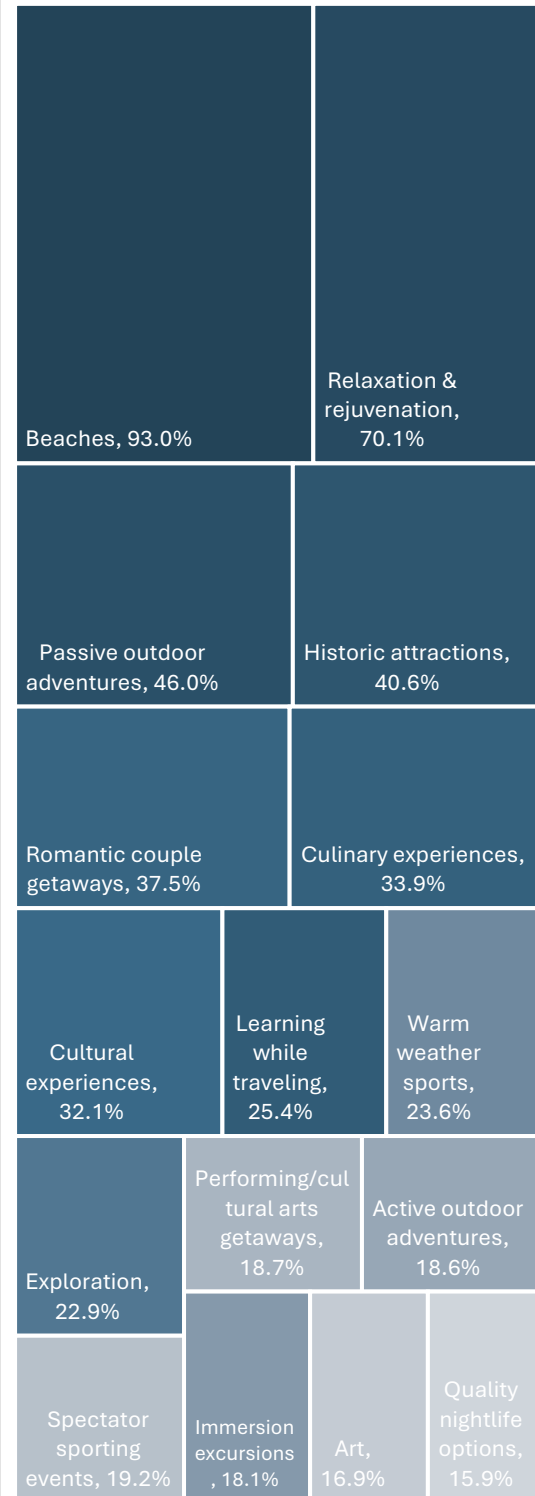
Table 41: Preferred Travel Months

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	2025
Beaches	88.4%	65.1%	71.2%	87.1%	93.0%
Relaxation & rejuvenation	85.4%	66.9%	72.2%	85.3%	70.1%
Passive outdoor adventures	72.6%	64.4%	63.7%	76.1%	46.0%
Romantic couple getaways	70.0%	65.0%	60.8%	74.7%	40.6%
Historic attractions	75.5%	64.4%	60.9%	73.6%	25.4%
Culinary experiences	70.1%	63.7%	60.3%	73.0%	33.9%
Cultural experiences	70.7%	62.9%	57.5%	72.1%	37.5%
Quality nightlife options	52.6%	60.3%	52.2%	66.7%	32.1%
Learning while traveling	60.9%	56.3%	54.1%	66.2%	22.9%
Immersion excursions	49.6%	57.4%	51.1%	66.1%	23.6%
Active outdoor adventures	46.8%	59.6%	51.9%	64.8%	18.1%
Exploration	57.5%	59.8%	54.1%	63.7%	18.6%
Art	49.8%	57.1%	49.2%	63.1%	18.7%
Theme parks	44.7%	58.7%	51.7%	63.1%	19.2%
Warm weather sports	52.7%	61.2%	53.5%	62.9%	16.9%
Water sports	48.8%	60.4%	51.1%	62.1%	15.9%
Performing/cultural arts getaways	51.2%	58.6%	50.5%	61.0%	15.4%
Luxury camping	39.9%	55.0%	50.7%	60.6%	14.9%
Urban getaway	48.4%	58.5%	48.0%	60.2%	12.8%
Spectator sporting events	49.2%	57.0%	51.5%	59.7%	13.9%
Waterparks	40.3%	54.4%	47.9%	58.4%	12.1%
Medical/wellness	40.8%	55.5%	47.9%	56.1%	8.4%
Golf getaways	37.4%	50.6%	41.9%	52.3%	10.9%
Winter sports	30.2%	53.9%	42.5%	51.7%	7.2%
Voluntourism	29.5%	49.9%	40.8%	47.6%	6.4%
Tennis getaways	25.8%	48.5%	36.2%	47.0%	5.9%
N	949	1,005	1,62	967	1,539

Table 42: Preferred Vacation/Leisure Travel Experiences

Figure 16: Preferred Travel Experiences



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

“Important” + “Very Important”	2021	2022	2023	2024	2025
Natural beauty of the destination	88.4%	72.1%	76.9%	92.8%	90.7%
Ease of access	85.4%	70.5%	73.3%	85.5%	89.3%
Quality of lodging options	52.7%	71.0%	72.6%	84.9%	88.1%
Affordability	75.5%	67.2%	73.0%	80.6%	86.9%
Quality of dining options	44.7%	72.5%	74.6%	85.8%	86.7%
Diversity of dining options	70.0%	68.6%	70.4%	83.2%	78.9%
Travel distance	70.7%	63.1%	63.3%	71.1%	68.8%
Diversity of lodging options	25.8%	67.3%	65.9%	77.8%	64.5%
Low traffic congestion	60.9%	64.8%	63.6%	74.7%	63.9%
Access to other cities in the surrounding area	46.8%	58.8%	57.8%	66.9%	54.1%
Environmental/ecological sensitivity	72.6%	67.6%	59.2%	69.9%	49.4%
Activities like events/festivals	49.6%	64.2%	55.4%	66.0%	48.0%
Medical/wellness	37.4%	60.4%	52.6%	60.1%	35.7%
Nightlife activity options	48.4%	61.4%	53.2%	65.7%	28.2%
Public transportation	57.5%	57.0%	49.2%	57.9%	23.2%
Total	949	1,005	1,625	967	1,526

Table 43: Preferred Attributes for Vacations/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.	2.0%	4.9%	26.8%	35.3%	25.8%
I try to support the local economy of places that I visit.	32.4%	49.9%	7.2%	1.1%	4.1%
N	1,526				

Table 44: Travel Preferences

APPENDIX

ALL ZIP CODES COLLECTED BY MSA

MSA	Count	Percent	MSA	Count	Percent
New York-Newark-Jersey City, NY-NJ	71	4.6%	Hartford-West Hartford-East Hartford, CT	7	0.5%
Chicago-Naperville-Elgin, IL-IN	57	3.7%	Jacksonville, FL	7	0.5%
Atlanta-Sandy Springs-Roswell, GA	44	2.9%	Nashville-Davidson--Murfreesboro--Franklin, TN	7	0.5%
Charlotte-Concord-Gastonia, NC-SC	40	2.6%	Orlando-Kissimmee-Sanford, FL	7	0.5%
Cincinnati, OH-KY-IN	40	2.6%	Savannah, GA	7	0.5%
Rural OH	39	2.5%	Athens-Clarke County, GA	6	0.4%
Pittsburgh, PA	37	2.4%	Austin-Round Rock-San Marcos, TX	6	0.4%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	35	2.3%	Birmingham, AL	6	0.4%
Columbus, OH	34	2.2%	Charleston-North Charleston, SC	6	0.4%
Minneapolis-St. Paul-Bloomington, MN-WI	31	2.0%	Des Moines-West Des Moines, IA	6	0.4%
Akron, OH	30	1.9%	Johnson City, TN	6	0.4%
Hilton Head Island-Bluffton-Port Royal, SC	29	1.9%	Lexington-Fayette, KY	6	0.4%
Boston-Cambridge-Newton, MA-NH	26	1.7%	Omaha, NE-IA	6	0.4%
Dallas-Fort Worth-Arlington, TX	24	1.6%	Port St. Lucie, FL	6	0.4%
Greenville-Anderson-Greer, SC	23	1.5%	Worcester, MA	6	0.4%
Washington-Arlington-Alexandria, DC-VA-MD-WV	22	1.4%	Appleton, WI	5	0.3%
Indianapolis-Carmel-Greenwood, IN	20	1.3%	Bridgeport-Stamford-Danbury, CT	5	0.3%
Louisville/Jefferson County, KY-IN	20	1.3%	Dayton-Kettering-Beavercreek, OH	5	0.3%
Toledo, OH	19	1.2%	Fort Wayne, IN	5	0.3%
Myrtle Beach-Conway-North Myrtle Beach, SC	18	1.2%	Greensboro-High Point, NC	5	0.3%
St. Louis, MO-IL	18	1.2%	Madison, WI	5	0.3%
Augusta-Richmond County, GA-SC	17	1.1%	Peoria, IL	5	0.3%
Columbia, SC	16	1.0%	Rural AL	5	0.3%
Grand Rapids-Wyoming-Kentwood, MI	16	1.0%	San Francisco-Oakland-Fremont, CA	5	0.3%
Asheville, NC	15	1.0%	Springfield, IL	5	0.3%
Detroit-Warren-Dearborn, MI	14	0.9%	Winston-Salem, NC	5	0.3%
Milwaukee-Waukesha, WI	14	0.9%	Allentown-Bethlehem-Easton, PA-NJ	4	0.3%
Baltimore-Columbia-Towson, MD	13	0.8%	Ann Arbor, MI	4	0.3%
Buffalo-Cheektowaga, NY	13	0.8%	Atlantic City-Hammonton, NJ	4	0.3%
Rochester, NY	13	0.8%	Barnstable Town, MA	4	0.3%
Durham-Chapel Hill, NC	12	0.8%	Binghamton, NY	4	0.3%
Los Angeles-Long Beach-Anaheim, CA	12	0.8%	Blacksburg-Christiansburg-Radford, VA	4	0.3%
Phoenix-Mesa-Chandler, AZ	12	0.8%	Bloomington, IL	4	0.3%
Richmond, VA	12	0.8%	Burlington-South Burlington, VT	4	0.3%
Kansas City, MO-KS	11	0.7%	Canton-Massillon, OH	4	0.3%
Miami-Fort Lauderdale-West Palm Beach, FL	11	0.7%	Harrisonburg, VA	4	0.3%
Virginia Beach-Chesapeake-Norfolk, VA-NC	11	0.7%	Lafayette-West Lafayette, IN	4	0.3%
Kingsport-Bristol, TN-VA	10	0.6%	Lancaster, PA	4	0.3%
Raleigh-Cary, NC	10	0.6%	Lynchburg, VA	4	0.3%
Wilmington, NC	10	0.6%	North Wilkesboro, NC	4	0.3%
Albany-Schenectady-Troy, NY	9	0.6%	Norwich-New London-Willimantic, CT	4	0.3%
Knoxville, TN	9	0.6%	Palm Bay-Melbourne-Titusville, FL	4	0.3%
Denver-Aurora-Centennial, CO	8	0.5%	Portland-Vancouver-Hillsboro, OR-WA	4	0.3%
Harrisburg-Carlisle, PA	8	0.5%	Rural GA	4	0.3%
Houston-Pasadena-The Woodlands, TX	8	0.5%	Rural MI	4	0.3%
Providence-Warwick, RI-MA	8	0.5%	Rural NH	4	0.3%
Rural IA	8	0.5%	Rural NY	4	0.3%

MSA	Count	Percent	MSA	Count	Percent
Scranton--Wilkes-Barre, PA	4	0.3%	Kingston, NY	2	0.1%
Seattle-Tacoma-Bellevue, WA	4	0.3%	Las Vegas-Henderson-North Las Vegas, NV	2	0.1%
Seneca, SC	4	0.3%	Manchester-Nashua, NH	2	0.1%
Albany, GA	3	0.2%	Marshall, MN	2	0.1%
Auburn, NY	3	0.2%	Marshalltown, IA	2	0.1%
Batavia, NY	3	0.2%	Morehead City, NC	2	0.1%
Beaver Dam, WI	3	0.2%	Norwalk, OH	2	0.1%
Cape Coral-Fort Myers, FL	3	0.2%	Ogden, UT	2	0.1%
Cedar Rapids, IA	3	0.2%	Oneonta, NY	2	0.1%
Celina, OH	3	0.2%	Parkersburg-Vienna, WV	2	0.1%
Charleston, WV	3	0.2%	Portsmouth, OH	2	0.1%
Charlottesville, VA	3	0.2%	Reading, PA	2	0.1%
Chattanooga, TN-GA	3	0.2%	Richmond-Berea, KY	2	0.1%
Eau Claire, WI	3	0.2%	Rochelle, IL	2	0.1%
Evansville, IN	3	0.2%	Rochester, MN	2	0.1%
Frankfort, KY	3	0.2%	Rockingham, NC	2	0.1%
Huntington-Ashland, WV-KY-OH	3	0.2%	Rural KY	2	0.1%
Jackson, MI	3	0.2%	Rural MO	2	0.1%
Jamestown-Dunkirk, NY	3	0.2%	Rural NC	2	0.1%
Lewisburg, PA	3	0.2%	Rural PA	2	0.1%
Macon-Bibb County, GA	3	0.2%	Rural VA	2	0.1%
Monroe, MI	3	0.2%	Somerset, KY	2	0.1%
Morristown, TN	3	0.2%	Somerset, PA	2	0.1%
New Haven, CT	3	0.2%	Springfield, OH	2	0.1%
North Port-Bradenton-Sarasota, FL	3	0.2%	Statesboro, GA	2	0.1%
Ocala, FL	3	0.2%	Syracuse, NY	2	0.1%
Roanoke, VA	3	0.2%	Tampa-St. Petersburg-Clearwater, FL	2	0.1%
Rural MN	3	0.2%	Torrington, CT	2	0.1%
Salem, OH	3	0.2%	Warner Robins, GA	2	0.1%
San Antonio-New Braunfels, TX	3	0.2%	Weirton-Steubenville, WV-OH	2	0.1%
Spartanburg, SC	3	0.2%	West Plains, MO	2	0.1%
Wichita, KS	3	0.2%	York-Hanover, PA	2	0.1%
Youngstown-Warren, OH	3	0.2%	Albuquerque, NM	1	0.1%
Adrian, MI	2	0.1%	Alexandria, LA	1	0.1%
Ashland, OH	2	0.1%	Altoona, PA	1	0.1%
Auburn, IN	2	0.1%	Amarillo, TX	1	0.1%
Baton Rouge, LA	2	0.1%	Anchorage, AK	1	0.1%
Bedford, IN	2	0.1%	Astoria, OR	1	0.1%
Bismarck, ND	2	0.1%	Athens, TN	1	0.1%
Boise City, ID	2	0.1%	Bangor, ME	1	0.1%
Boulder, CO	2	0.1%	Batesville, AR	1	0.1%
Burlington, NC	2	0.1%	Beaumont-Port Arthur, TX	1	0.1%
Champaign-Urbana, IL	2	0.1%	Billings, MT	1	0.1%
Charleston-Mattoon, IL	2	0.1%	Bloomington, IN	1	0.1%
Clewiston, FL	2	0.1%	Bloomsburg-Berwick, PA	1	0.1%
Columbus, IN	2	0.1%	Brainerd, MN	1	0.1%
Decatur, IN	2	0.1%	Brookings, SD	1	0.1%
Deltona-Daytona Beach-Ormond Beach, FL	2	0.1%	Brunswick-St. Simons, GA	1	0.1%
Erie, PA	2	0.1%	Bucyrus, OH	1	0.1%
Fort Collins-Loveland, CO	2	0.1%	Cañon City, CO	1	0.1%
Fresno, CA	2	0.1%	Cape Girardeau, MO-IL	1	0.1%
Greeneville, TN	2	0.1%	Chico, CA	1	0.1%
Holland, MI	2	0.1%	Clarksburg, WV	1	0.1%
Kalamazoo-Portage, MI	2	0.1%	Cleveland, TN	1	0.1%
Keene, NH	2	0.1%	Clinton, IA	1	0.1%

MSA	Count	Percent	MSA	Count	Percent
Colorado Springs, CO	1	0.1%	Owensboro, KY	1	0.1%
Columbus, NE	1	0.1%	Oxnard-Thousand Oaks-Ventura, CA	1	0.1%
Concord, NH	1	0.1%	Paducah, KY-IL	1	0.1%
Corpus Christi, TX	1	0.1%	Pierre, SD	1	0.1%
Crawfordsville, IN	1	0.1%	Portland-South Portland, ME	1	0.1%
Cumberland, MD-WV	1	0.1%	Provo-Orem-Lehi, UT	1	0.1%
Danville, IL	1	0.1%	Racine-Mount Pleasant, WI	1	0.1%
Daphne-Fairhope-Foley, AL	1	0.1%	Reno, NV	1	0.1%
Davenport-Moline-Rock Island, IA-IL	1	0.1%	Riverside-San Bernardino-Ontario, CA	1	0.1%
Decatur, AL	1	0.1%	Rockford, IL	1	0.1%
Decatur, IL	1	0.1%	Rural CA	1	0.1%
Defiance, OH	1	0.1%	Rural CO	1	0.1%
Duluth, MN-WI	1	0.1%	Rural IL	1	0.1%
Durant, OK	1	0.1%	Rural MD	1	0.1%
Elkhart-Goshen, IN	1	0.1%	Rural NE	1	0.1%
Eureka-Arcata, CA	1	0.1%	Rural WI	1	0.1%
Faribault-Northfield, MN	1	0.1%	Sacramento-Roseville-Folsom, CA	1	0.1%
Fayetteville-Springdale-Rogers, AR	1	0.1%	Salisbury, MD	1	0.1%
Findlay, OH	1	0.1%	San Angelo, TX	1	0.1%
Florence, SC	1	0.1%	San Diego-Chula Vista-Carlsbad, CA	1	0.1%
Fond du Lac, WI	1	0.1%	San Jose-Sunnyvale-Santa Clara, CA	1	0.1%
Fremont, OH	1	0.1%	Sandusky, OH	1	0.1%
Gaffney, SC	1	0.1%	Sault Ste. Marie, MI	1	0.1%
Gainesville, FL	1	0.1%	Sevierville, TN	1	0.1%
Gainesville, GA	1	0.1%	Sidney, OH	1	0.1%
Grand Junction, CO	1	0.1%	Spokane-Spokane Valley, WA	1	0.1%
Green Bay, WI	1	0.1%	Stevens Point-Plover, WI	1	0.1%
Hickory-Lenoir-Morganton, NC	1	0.1%	Sumter, SC	1	0.1%
Hilo-Kailua, HI	1	0.1%	Talladega-Sylacauga, AL	1	0.1%
Huntsville, AL	1	0.1%	Texarkana, TX-AR	1	0.1%
Jackson, MS	1	0.1%	Tupelo, MS	1	0.1%
Jefferson City, MO	1	0.1%	Vallejo, CA	1	0.1%
Jefferson, GA	1	0.1%	Victoria, TX	1	0.1%
Killeen-Temple, TX	1	0.1%	Waterloo-Cedar Falls, IA	1	0.1%
Lakeland-Winter Haven, FL	1	0.1%	Wooster, OH	1	0.1%
Lawrence, KS	1	0.1%			
Lawrenceburg, TN	1	0.1%			
Lewisburg, TN	1	0.1%			
Lima, OH	1	0.1%			
Logan, UT-ID	1	0.1%			
Longview, TX	1	0.1%			
Meadville, PA	1	0.1%			
Memphis, TN-MS-AR	1	0.1%			
Michigan City-La Porte, IN	1	0.1%			
Milledgeville, GA	1	0.1%			
Mobile, AL	1	0.1%			
Monroe, LA	1	0.1%			
Montgomery, AL	1	0.1%			
Muncie, IN	1	0.1%			
Natchitoches, LA	1	0.1%			
Newport, TN	1	0.1%			
Oak Harbor, WA	1	0.1%			
Oshkosh-Neenah, WI	1	0.1%			
Ottawa, IL	1	0.1%			
Owatonna, MN	1	0.1%			



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