THE ECONOMIC IMPACT OF THE TOURISM ECONOMY AND TOURISM PROFILE OF BEAUFORT COUNTY AND THE SURROUNDING AREA

Prepared for: The Greater Beaufort Chamber of Commerce

**Prepared by: Bureau of Business Research
and Economic Development
Georgia Southern University**

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TABLE OF CONTENTS

LIST OF TABLES AND FIGURES

EXECUTIVE SUMMARY

This study, as requested by the Greater Beaufort Chamber of Commerce, estimates the economic impact of tourists by county, the impact within sub regions of Beaufort County, and reanalyzes the tourist profiles within the region. Various sources were used to estimate the tourist profiles. These include studies by the Travel Industry Association of America (TIA) and a study by the Southeastern Institute of Research, Inc. The economic impact was estimated with IMPLAN, a regional input/output modeling program.

The area served by the Greater Beaufort Chamber of Commerce includes the following four counties: Beaufort, Colleton, Hampton, and Jasper. Tourism in this area supports about 28% of all jobs annually within the region. In Beaufort County tourism supports about 44% of all jobs. The estimated number of visitors for each county, as reported by TIA, was about 3.0 million for Beaufort (2.2 million of which visited Hilton Head Island), 86.0 thousand for Colleton, 18.0 thousand for Hampton, and 12.0 thousand for Jasper. The estimated number of visitor days (number of tourists multiplied by the number of days spent) was 10.5 million for Beaufort (7.5 million of which were on Hilton Head Island), 390.2 thousand for Colleton, 81.0 thousand for Hampton, 54.4 thousand for Jasper.

Based on the estimated number of visitors, the following is a summary of direct spending by tourists and the total economic impact by county.

- Colleton County had an estimated total direct tourism expenditure of $21.9 million (2000$) and a total economic impact of $34.5 million (2005$). The tourism industry in this county supports a total of 636 jobs annually.
- Jasper County had an estimated total direct tourism expenditure of $3.1 million (2000$) and a total economic impact of $4.8 million (2005$). The tourism industry in this county supports a total of 86 jobs annually.
- Hampton County had an estimated total direct tourism expenditure of $4.6 million (2000$) and a total economic impact of $7.3 million (2005$). The tourism industry in this county supports a total of 132 jobs annually.

- Beaufort County, the largest amongst the group, had an estimated total direct tourism expenditure of $728.3 million (2000$) and a total economic impact of $1.2 billion (2005$). The tourism industry in this county supports a total of 21,076 jobs annually.
- Hilton Head Island accounts for about 72% of the total impact for Beaufort County. When looking at Hilton Head Island separately from Beaufort County, the estimated total direct tourism expenditure was estimated at $525.4 million (2000$) and the total economic impact was $844.7 million (2005$). The tourism industry in the Hilton Head area supports a total of 15,192 jobs annually.

Each direct dollar spent by a tourist, as shown above, not only supports the more "classic" tourism jobs (a hotel worker or specialty gift shop owner near the beach), but also supports other high paying, high skilled, and high knowledge jobs within the area. For example, a locally owned specialty gift shop owner could easily require a business consultant to set up their business, an accountant during tax season, and a banker for both the initial loan and for recurring business needs. In addition to these high paying jobs on the business level, there could be even more when looking at demands from people associated with each additional job for that gift store. That is each person added to the local or regional labor force due to the gift shop will in turn put demand for other services within the region like doctors, lawyers, and teachers. This linkage from a tourism economy to the entire economy is shown by what is called a multiplier effect. The job multiplier for the Beaufort area was 1.26. For every 100 jobs in the tourism industry, there were an additional 26 jobs supported in the region.

Other findings of this study include the economic impact and tourist profile by the primary activity of the visitors (Shopping, Outdoor, Historic, Events/Festivals, and Other). As such, the two largest activities were Shopping and Historic travel with 26% and 25%, respectively, for the entire region. The activity with the least amount of tourism expenditures for the area was Events/Festivals with 5%. The following is a summary for only Shopping and Historic travelers.

- A visitor that travels to this region primarily for Shopping has a mean household income of $59,500, was about 47 years old, and most likely has a college education (55%). Shopping travelers were the least seasonal with 32% of the travel occurring during the Summer. The average party size was 2.1, the average length of stay was 4.2, and average amount spent during the trip was $531. The total economic impact for the region in 2005 dollars was $323.0 million.
- A visitor that travels to this region primarily for Historic and Cultural Travel has a mean household income of $59,800 and was about 50 years old. Historic travelers visit mostly during Spring, Summer, and Fall months with about 23%, 39%, and 23%, respectively. The average party size was 2.1, the average length of stay was 5.1, and average amount spent during the trip was $614. The total economic impact for the region in 2005 dollars was $306.4 million.

Overall, the area served by the Greater Beaufort Chamber of Commerce has a significant economic impact on the tourism economy within the region. The total direct tourism expenditure was $757.9 million (2000$) and the total economic impact was 1.2 billion (2005$). The tourism industry in this four county area supports a total of 21,929 jobs annually.

INTRODUCTION

The Bureau of Business Research and Economic Development was asked by the Greater Beaufort Chamber of Commerce to estimate the economic impact of their tourism economy by county and reanalyze their tourist profiles. In addition, it was requested that the estimated impacts be broken into smaller regions within Beaufort County. Various sources were used to estimate the impacts and tourist profiles. These include studies by the Travel Industry Association of America (TIA) and a study by the Southeastern Institute of Research, Inc.

In order to analyze and show the economic contributions of the tourism economy, this study first identifies the economic regions and explains the terminology that this study used when referring to the various regions. This is most important when looking at the definition of the Hilton Head Island Area and the other areas within Beaufort County.

Next, all of the data elements used within this study were explained and this study identified all of its sources. In cases where the data was changed from the original source, this study explained the reasoning and showed the results. Such critical data elements included are the tourism profiles (i.e. party size and trip lengths), the primary purpose of the trip (i.e. Outdoors or Events/Festivals), the estimated number of visitors, and the estimated amount of expenditures per visitor.

The Findings section of this study shows the economic impact of the tourism sector on the economy using IMPLAN, an economic input/output modeling program. The first part of the Findings section shows the direct tourism dollars spent by tourists per year. This allows the reader to understand bases from which the impacts were drawn from. The second part provides a summary of each activity and identifies each impact and their contribution to the economy.

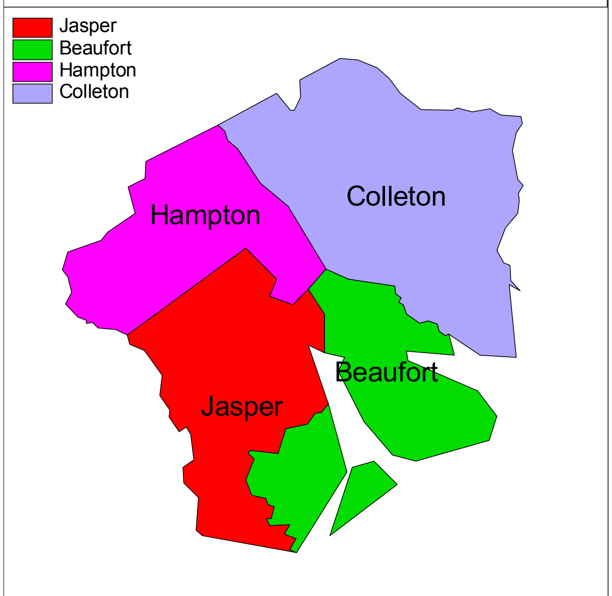
METHODOLOGY

The methodology section has been separated into five sections. The first section explains the economic regions used in this study. The second, third, and fourth sections look at how the tourism profile, visitors, and expenditures were estimated, respectively. The fifth section briefly describes IMPLAN, the economic model used to show the impacts.

Region

The region used for this study consists of Beaufort, Colleton, Jasper, and Hampton counties. Because of Hilton Head Island's large contribution to the travel and tourism industry, it too has been included as separate set of results for of Beaufort County. It should be noted that the results for Beaufort County include the impacts of Hilton Head Island. However, Hilton Head Island results are a subset of Beaufort, and are shown separately due to the size and uniqueness of the island's travel and tourism industry.

FIGURE 1
THE STUDY AREA



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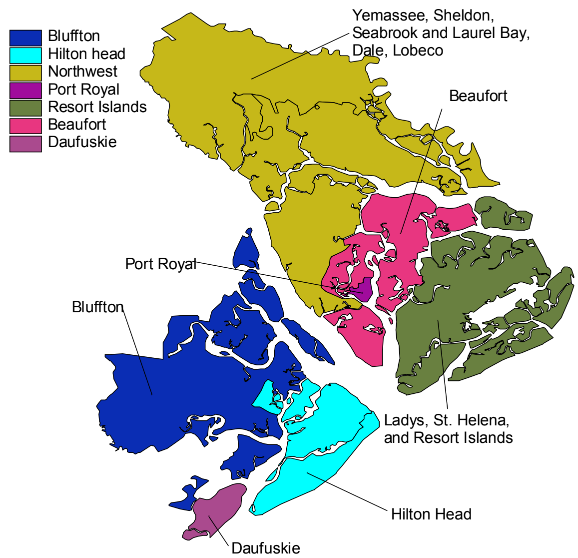
It should also be noted that when referring to Hilton Head Island, this study is actually referring to the more general Hilton Head/Bluffton area. For the remainder of this report, this four-county region will be referred to as "the study area." Figure 1, represents this area.

In addition to the four-county area, this study broke the impact for Beaufort County into sub regions. The sub regions include the following areas: Bluffton, Hilton Head, Northwest (which includes Yemassee, Sheldon, Seabrook and Laurel Bay, Dale, and

Lobeco), Port Royal, Resort Islands (which includes Ladys, St. Helena and other resort islands), Beaufort, and Daufuskie. Figure 2, represents the sub regions within Beaufort County. The method of breaking down the County impact was based on the presence of tourism businesses within each sub region.[1]

FIGURE 2
BEAUFORT COUNTY - REGIONS



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Tourism Profile

For this study, it is assumed that the spending patterns of the travelers in the study area will not be significantly different from the South Carolina average. Regardless of where a traveler goes, the percent of the total spending which goes to food, lodging, and so forth remains fairly

TABLE 1
Tourism Profile for Jasper, Colleton, and Hampton Counties

Sector	% of Total*	Total Expenditure	Average Trip Spending
Transportation	26.70%	$7,894,686	$146.21
Lodging	22.80%	$6,741,530	$124.86
Foodservice	31.40%	$9,284,388	$171.95
Entertainment & Recreation	8.50%	$2,513,290	$46.55
General Retail Trade	10.60%	$3,134,220	$58.05

* Based on the SC tourist profile

Activity	% of Total*	Average Trip Expenditure	Average Trip Length	Average Party Size
Shopping	33.00%	$531	4.2	2.1
Outdoor	22.00%	$538	4.8	2.3
Historic	21.00%	$614	4.8	2.1
Events/Festivals	8.00%	$824	5.2	2.8
Other	16.00%	$438	4.2	2

* Based on the US tourist profile

[1] A weighted value was calculated based on direct tourism expenditures from Beaufort County by sector from IMPLAN and divided by the total expenditure from the base data for that county and sector. Those weights were used within the sub regions and applied to a detailed business database called Reference USA.

constant. Therefore, these numbers are based on data from the South Carolina Statistical Abstract and TIA visitor data for 2002. In addition, the Average Party Size, Average Trip Length, and percent of the primary trip activity for Jasper, Colleton, and Hampton counties are considered to be the same as the national average for travel. The primary activities for these three counties include the following: shopping, outdoor activities, historic activities, events/festivals, and other activites as shown in Table 1. All of these averages are based on 2000 data, and are taken from the TIA's Domestic Travel Market Report for 2000.

Unlike the other counties, there was specific tourist activity data for Beaufort County, as shown in Table 2. This data came partially from the 2000 Inquiry Conversion and Visitor Profile Study performed by the Southeastern Institute of Research. What was not available from this study was the average tourism expenditure. Therefore, this study used the tourist profile by activity by income group from Beaufort and applied the national expenditure by income group from TIA's Domestic Travel Market Report for 2000. The primary activities used for Beaufort and Hilton Head include the following: Shopping, Outdoor, Historical, Events/Festivals, Nightlife, Other (including Gambling), Sports Events, and Golf/Tennis.

TABLE 2
Activities for Beaufort County (Including Hilton Head)

Activity	% of Total*	Amount
Shopping	26%	$190,272,123
Outdoor	20%	$144,344,369
Historical	25%	$183,711,015
Events/Festivals	5%	$32,805,538
Nightlife	8%	$59,049,969
Other (inc. Gambling)	6%	$45,927,754
Sports Event	5%	$32,805,538
Golf/Tennis	5%	$39,366,646

*Based partially on Research by the Southeastern Institute of Research

Visitors

The estimated number of visitors by county was calculated based on data from South Carolina Statistical Abstract and TIA visitor data for 2002. In that report, SCPRT and TIA estimated the number of visitor days for each

TABLE 3
Estimates for Total Trips, Visitors, and Visitor-Days

	# Trips	# Visitors	# Visitor-Days
Colleton	40,081	86,483	390,204
Jasper	5,590	12,060	54,416
Hampton	8,323	17,959	81,032
Beaufort*	1,554,562	3,043,489	10,469,099
Hilton Head	1,111,054	2,173,575	7,486,757

*Includes Hilton Head Island

county, not the number of visitors. Visitor days is a visitor equivalent that includes the estimated trip-length of each visitor and the party size. Table 3 shows the both the visitor days by county and the estimated number of visitors. The data for Hilton Head Island was given to us by the Hilton Head Island/Bluffton Chamber of Commerce.

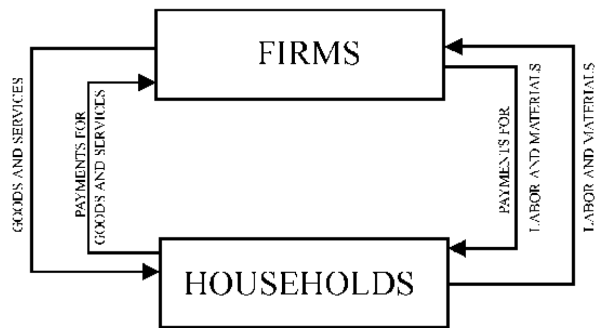
Expenditures

The estimated expenditures is the last key data element for this study. The total tourism expenditure by county was broken into the following sectors: Transportation, Food, Lodging, Entertainment, and Retail. For this study, we have excluded Transportation costs, since the figures provided do not include the cost of traveling to the study area from the traveler's point of origin. In addition to this, much of the transportation-related costs (gas, plane tickets, etc) will be spent outside of the study area. As mentioned above, the percentages for these five sectors are drawn from 2002 data from the TIA.

IMPLAN

After gathering the previous information, the total output for each sector was entered into the regional model built from the program, IMPLAN. **Im**pact **A**nalysis for **PLAN**ning is nationally recognized as one of the best input-output modeling systems and includes a database for the state of South Carolina and each of its counties. The estimates were prepared using the 2000 database, which is the most current database available. Since the expenditure data is in years 2000 dollars, the program automatically inflates the dollars to 2005. Therefore, all of the estimates impacts are reported in base year 2000 dollars. Input-Output analysis, a branch of economic modeling and statistics, has the ability to illustrate and quantify the economic interdependence of producing industries in any regional or local economy. Just as each industry produces goods and services, it is also a consumer by purchasing other goods and services for use in the production process. Using the input-output analysis technique, the impact of a specific industry or economic activity can be traced throughout all sectors of the economy.

Figure 3



Economists often view the economy as if it were a series of transactions that flowed in a circle. In order to understand the theory behind input-output models, it is best to understand the Circular Flow of Transactions in a basic economy. Economists often summarize the economy by describing it as a series of transactions. Each transaction by one sector has a counterbalancing transaction in at least one other sector. In Figure 3, the outside loop refers to such things as goods, services, labor, and capital. The households provide firms with such things and labor materials.[2] In return, the firms provide households with such things as goods and services for sale. The inner loop, on the other hand, identifies the payments for the transaction of the goods and services, which are part of the outer loop. The firm pays the household wages and other payments for labor and materials. The household, however, provides payments back to the firms for the goods and services it produces.

Equilibrium in this simple economy will be maintained as long as there are no leakages from the system. Leakages include savings, imports, and taxes. A leakage means that the amount of payments going to the firm for its goods and services is less than the income obtained by the household. When leakages occur, the total amount of income and goods will shrink unless new spending injections occur to offset the losses. Some examples of these injections are: 1) the investment of savings by the firms; 2) consumers from outside

[2] In a private, market economy, the households are the ultimate owners of all the productive resources.

of the region buying the firm's goods, exports; and/or; 3) government purchase of goods with generated tax revenue. The economy will balance if injections continue to equal leakages. If injections are greater than leakages, the economy will grow. When leakages exceed injections, the economy will shrink.

TABLE 4

HYPOTHETICAL TRANSACTIONS TABLE

Outputs* / Inputs*	[1] A	[2] B	[3] C	[4] D	[5] E	[6] F	[7] Gross inventory accumul-ation(+)	[8] Exports to foreign countries	[9] Govern-ment purchases	[10] Gross private capital formation	[11] House-holds	[12] Total Gross Output
[1] Industry A	10	15	1	2	5	6	2	5	1	3	14	64
[2] Industry B	5	4	7	1	3	8	1	6	3	4	17	59
[3] Industry C	7	2	8	1	5	3	2	3	1	3	5	40
[4] Industry D	11	1	2	8	6	4	0	0	1	2	4	39
[5] Industry E	4	0	1	14	3	2	1	2	1	3	9	40
[6] Industry F	2	6	7	6	2	6	2	4	2	1	8	46
[7] Gross inventory depletion (-)	1	2	1	0	2	1	0	1	0	0	0	8
[8] Imports	2	1	3	0	3	2	0	0	0	0	2	13
[9] Payments to government	2	3	2	2	1	2	3	2	1	2	12	32
[10] Depreciation allowances	1	2	1	0	1	0	0	0	0	0	0	5
[11] Households	19	23	7	5	9	12	1	0	8	0	1	85
[12] Total Gross Outlays	64	59	40	39	40	46	12	23	18	18	72	431

*Sales to industries and sectors along the top of the table from the industry listed in each row at the left of the table.

**Purchases from industries and sectors at the left of the table by the industry listed at the top of each column.

Input-output models begin by simply assigning dollars to the flow of transactions between businesses, households, and other major consumer groups in the economy such as governments. The transactions are recorded in the hypothetical transactions table shown in Table 4. The rows display the transaction of things, goods, and services. The columns reveal the payments associated with each transaction. The system balances in that all injections and leakages are accounted for. In other words, **Total Output (Expenditures)** is equal to **Total Payments (Income/Revenue).**

The Transactions table is more than a numerical version of the Circular Flow diagram. The table is actually a set of equations that depict the linkage between the final demand for goods and services, and the payments, income or revenue, associated by the production of those goods and services. The solution of the system of equations results in a set of multipliers which show the relationship between the final demand for a good or service and the intermediate demand among the producers who supply goods and services at the various stages of production. The mathematical manipulation required to solve the set of equations will not be discussed here.[3]

Input-output models are driven by final demand (consumption). Industries selling to customers respond to the demand for their products by supplying customers directly. However, in order to supply consumer demand, the directly impacted industries must buy goods and services from other businesses. Hence, indirectly impacted producers supply goods and services to the industries responding to direct demand, which means that in turn they must buy goods and services from yet other producers. Each industry that produces goods and services generated demand for other goods and services and so on, in a round by round fashion. These round by round incremental effects are described as multipliers. Within the general framework of input-output analysis, various methodologies can be employed to solve the mathematical equations and derive the multipliers.

IMPLAN relies on a complex database of linked expenditure patterns between 528 processing sectors in the economy. Using data specific down to the county level for the state of South Carolina, the program is capable of generating five separate impact

[3] A general discussion of the mathematical process for deriving multipliers is found in *The Elements of Input-Output Analysis*, by William H. Miernyk. IMPALN estimates Leontief Type I multipliers and a modified form of Miernyk's Type III multipliers.

measures in the form of multipliers. These are: 1) output multipliers; 2) personal income multipliers; 3) total income multipliers; 4) value-added multipliers; and, 5) employment multipliers. Each of the multipliers is composed of several components or effects. These effects are denoted: 1) direct effects; 2) indirect effects; and, 3) induced effects. There are three types of multipliers which may be estimated in a system of input-output equations. These are termed Type I, Type II, and Type III Sam multipliers. Type I multipliers include only the direct and indirect effects. Type II multipliers are almost a complete estimate of a full impact including the direct, indirect, and induced effects.[4] Type III, Sam multipliers, are used in this study because it includes the full impact of an economic event, including Type I, Type II, and households and governments.

The direct effects on any given producer or industry are the output and employment associated with the immediate effects of change in final demand. Final demands consist of purchases of goods and services for final consumption, as opposed to an intermediate purchase where the goods will be further re-manufactured by a supplier of final demand. For example, expenditures for new bridge construction are direct final demand.

The indirect effects are the output or employment associated with backward linkages in industry demand. These are the inter-industry effects i.e. producers buying from other local businesses. To produce the output necessary to serve final demand, directly impacted industries must demand inputs form supporting producers. In order for supporting businesses to produce the intermediate demand for output going to the directly

[4] Induced effects may be estimated by either Type II or Type III Leontief Multipliers. The primary difference between the two types of multipliers arises from the type of constraint imposed on the system of equations. The Type III multipliers used in IMPACN assumes that the economy is at full employment. Therefore, any change in final demand either increased or decreases population by the number of jobs created or lost. It is therefore assumed that wages do not adjust, only the number of people employed. Each person added or lost adds to or deducts form the average expenditures per person.

Type II multipliers, on the other hand, assume that employment income increases or decreases as final demand changes. Therefore, it is assumed that wages adjust, but not employment. As each employee's income increases, the model assumes that expenditures on all personal consumption items increases.

impacted industries, they require the input of goods and services from other businesses and employment. Therefore, some portion of the demand for each intermediate producer is attributable to the primary supplier of final demand. The induced effects are changes in demand associated with the household income generated by the direct and indirect effects of output or employment. Household consumption is related to household income in a stable way and is typically estimated by the propensity to consume. Hence, employment and output generate income, which the household uses in turn to demand goods and services. Some part of each region's consumption, therefore, is dependent on household income generated by the owners and employees of both directly and indirectly impacted producers. Returning to Figure 3 and Table 4, input-output analysis traces how the final demand for goods and services has direct, indirect, and induced effects on industry final demand, total industry output, and employment.

FINDINGS

The tourism economy in the Greater Beaufort Area is a key contributor to the economy. Its vast size, as will be shown below, allows this industry to be comparable to most other major industries. In fact, even though it is segmented into several businesses spanning several sectors, the group as a whole is an exporting sector that supports a variety of local businesses. Moreover, this travel industry not only supports the typical tourism type of business (hotels and eating and drinking establishments), but also other non-typical businesses like education, banking, and legal services. More over, this industry supports many high paying and high skilled jobs.

The Findings section is separated into two major parts. The first part shows the direct economic value of tourism by county by type of activity (this is the direct spending from tourists), allowing the reader to understand the bases from which the total impacts were estimated. The second part contains the tourism profile and impact broken down by activity. This will allow the reader the make their own policy implications of each activity on the local economy and how they might want to market this in their tourism economy.

Direct Tourism Impact

Each visitor to the region from outside the area brings in new direct tourism dollars to the economy. Their spending can generally be allocated primarily to five sectors: Lodging, Eating and Drinking, Transportation, Entertainment & Recreation, and Retail. Although part of the Transportation expenditure from the visitor may be spent within the region, this study excludes it completely to prevent over counting.[5]

To better understand the tourism economy, it is important to break the direct tourism spending into sub groups, the primary purpose of a trip. This study uses the following categories as the primary purpose of a visitor to Colleton, Jasper, or Hampton: Shopping,

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[5] For more information about the methodology of the expenditures of visitors including transportation, please refer to the methodology section.

Outdoor, Historic, Events/Festivals, and Other. This means that all visitors to the region were allocated to only one of these groups even though they may have engaged in other secondary activities as part of their trip. As for Beaufort and Hilton Head, the categories were as follows: Shopping, Outdoor, Historical, Events/Festivals, Nightlife, Other Activities (including Gambling), Sports Event, and Golf/Tennis.

Table 5, shows the total direct spending by visitors in one year by their primary purpose of trip. As shown, the largest and second largest for each county were Shopping and Historic activities. The third largest for all three counties was Outdoor activities. When looking at the total direct spending by each county, excluding Beaufort County, one will see that Colleton has the largest tourism economy with about $21.9 million. Hampton has the second largest with $4.6 million and Jasper with the smallest at $3.1 million.

TABLE 5

Total Expenditures by activity (2000$)

Activity	Colleton	Jasper	Hampton
Shopping	7,752,318.24	1,081,101.55	1,609,890.86
Outdoor	4,183,382.74	583,394.72	868,745.25
Historic	4,991,359.50	696,071.33	1,036,534.33
Events/Festivals	1,766,637.89	246,366.95	366,870.15
Other	3,255,416.23	453,984.91	676,038.40
Total	21,949,114.60	3,060,919.47	4,558,078.99

The total direct spending by primary propose of trip for Beaufort and Hilton Head are shown in Table 6. It should be noted that Hilton Head Island was included in Beaufort County, and was represented separately because of its unique contribution to the tourism economy. Moreover, Hilton Head Island accounts for about 72% of total direct spending from visitors in Beaufort County. That means that $728.3 million was directly spent in Beaufort and $525.4 million of that was spent within the Hilton Head area.

Beaufort and Hilton Head were similar to that of Colleton, Jasper, and Hampton, in that Shopping, Historic, and Outdoor activities were the largest components of their tourism economy, respectively in that order.

TABLE 6

Expenditures in Beaufort County by Activity (2000$)

	Beaufort	Hilton Head*
Shopping	190,272,122.95	137,256,290.65
Outdoor	144,344,369.13	104,125,461.87
Historical	183,711,015.26	132,523,315.11
Events/Festivals	32,805,538.44	23,664,877.70
Nightlife	59,049,969.19	42,596,779.86
Other Activities (including Gambling)	45,927,753.81	33,130,828.78
Sports Event	32,805,538.44	23,664,877.70
Golf/Tennis	39,366,646.13	28,397,853.24
Total	728,282,953.35	525,360,284.91

***Hilton Head data is a subset of the total for Beaufort County**

Travel Profile and Impact

The next step in understanding the economic impact of tourism in the Beaufort Area economy is to look at how the direct spending from tourists are interlinked within the economy. This is done using IMPLAN, a regional input/output model designed to look at the inter industry transactions and the flow of dollars through the economy.[6] As indicated earlier, this section of the findings is broken out by activity or primary purpose of the visitor trips. Additionally, before each economic impact is shown, this study will analyze the tourist profile of each activity.

Travel Profile and Impact: Shopping

For the average US household engaged in shopping travel, the head of the household was 47 years of age and the Mean Household income was $59,500. Shopping travelers were the least seasonal of all travelers, with only 32% of travel occurring during Summer. The figures for Spring, Fall, and Winter were 23%, 25%, and 21% (Domestic Travel Market Report, Travel Industry Association of America, 2000).

These travel parties stayed an average of 4.2 days and spent an average of $531. The average party size was 2.1 people, and 26% of parties had at least one child. Most of these travelers (55%) were college educated. The most common occupation for the head of the household was a Managerial or Professional job. This applied to 42% of travel

[6] For more information about IMPLAN, please refer to the methodology section of this study.

parties. According to the study, 17% of household heads were retired, and 12% worked in Technical Sales/Administrative Support. Most of the household heads (64%) were married. The majority of these households (64%) had no children living in their home.

Tables 7 and 8 show the employment and output impacts of the expenditures made by shopping travelers on the four counties broken down by sector. As expected, the Service and Retail sectors were the sectors most impacted by travel and tourism. Additionally, most of the impact was concentrated in Beaufort County, which holds true for other types of tourists as well. Other significant impacts include the Transportation, Construction, and the Finance, Insurance, Real Estate sectors.

Shopping travelers supported 5,506 jobs in Beaufort County, (3,972 of which were in Hilton Head) and over $306 million dollars in output (approximately $220 million of which were in Hilton Head). In Colleton, 224 jobs are supported, with output of nearly $12.5 million. In Hampton County, 47 jobs were supported, with over $2.5 million in output. In Jasper County, 31 jobs are supported, with nearly $1.75 million in output.

TABLE 7

Total Employment Impact for Shopping by County

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	3	0	0	0	2
Non-Durables	17	1	0	0	12
Non-Manufacturing					
Agriculture/Fish	30	1	0	0	22
Mining	0	0	0	0	0
Construction	59	2	1	0	43
Transportation	63	3	1	0	45
Retail	3,274	133	28	19	2,362
Finance,Insurance, Real Estate	116	5	1	1	84
Services	1,906	78	16	11	1,375
Government	22	1	0	0	16
Dummy	16	1	0	0	12
Total	5,506	224	47	31	3,972

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

TABLE 8

Total Output Impact for Shopping by County (2005$)

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	474,881	19,348	4,018	2,698	342,564
Non-Durables	2,807,206	114,375	23,752	15,950	2,025,029
Non-Manufacturing					
Agriculture/Fish	1,377,358	56,118	11,654	7,826	993,583
Mining	321	13	3	2	231
Construction	3,875,036	157,882	32,787	22,017	2,795,329
Transportation	10,202,798	415,696	86,326	57,971	7,359,976
Retail	138,708,384	5,651,440	1,173,611	788,123	100,059,832
Finance,Insurance, Real Estate	22,582,586	920,090	191,071	128,311	16,290,363
Services	122,382,416	4,986,266	1,035,477	695,361	88,282,816
Government	3,644,072	148,472	30,832	20,705	2,628,718
Dummy	177,846	7,246	1,505	1,010	0
Total	306,232,904	12,476,946	2,591,036	1,739,974	220,906,733

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

Travel Profile and Impact: Historic

The second largest impact was the impact of travelers who participated in historic and cultural travel. This includes visits to historic sites, museums, and history-related events to name a few. The average head of household participating in historic travel was 50 years old and the mean household income was $59,800. This type of travel was more seasonal than shopping related travel. According to the travel report, 39% of visitors traveled in the Summer, while only 15% do so in the Winter. Both Spring and Fall had 23% of this type of travel (Domestic Travel Market Report, Travel Industry Association of America, 2000).

These travel parties stayed an average of 5.1 days and spent an average of $614. The average party size was 2.1 people, and 25% of parties had at least one child. Most of these travelers (58%) were college educated. The most common occupation for the head of the household was a Managerial or Professional job. This applied to 40% of travel parties. In 22% of households, the household heads were retired, and 10% worked in

Technical Sales/Administrative Support. Most of the household heads (62%) were married. The majority of these households (67%) had no children living in their home.

Tables 9 and 10 show the impact of historic travelers on the four counties, broken down by sector. Again, the Service and Retail sectors received the greatest impact, and most of the impact was concentrated in Beaufort County.

Historic travelers supported 5,317 jobs in Beaufort County (3,835 of which were in Hilton Head), and over $295 million dollars in output (over $213 million of which were in Hilton Head). In Colleton County, 144 jobs were supported, with output of about $8 million. In Hampton County, 30 jobs were supported, with over $1.6 million in output. In Jasper County, 18 jobs were supported, with nearly $1 million in output. It should be noted that the overall impact for Historic traveling was significantly less than the impact for Shopping in Colleton, Jasper, and Hampton counties. The numbers for each of these counties was roughly 30-35% less than the numbers for shopping travelers. In Beaufort County, the impact was only slightly less in relative terms.

TABLE 9

Total Employment Impact for Historic by County

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	3	0	0	0	2
Non-Durables	16	0	0	0	12
Non-Manufacturing					
Agriculture/Fish	29	1	0	0	21
Mining	0	0	0	0	0
Construction	57	2	0	0	41
Transportation	60	2	0	0	44
Retail	3,161	86	18	11	2,281
Finance,Insurance, Real Estate	112	3	1	0	81
Services	1,840	50	10	6	1,328
Government	21	1	0	0	15
Dummy	16	0	0	0	11
Total	5,317	144	30	18	3,835

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

TABLE 10

Total Output Impact for Historic by County (2005$)

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	458,506	12,457	2,587	1,528	330,751
Non-Durables	2,710,405	73,641	15,293	9,023	1,955,201
Non-Manufacturing					
Agriculture/Fish	1,329,863	36,132	7,503	4,433	959,321
Mining	310	8	2	1	223
Construction	3,741,414	101,653	21,110	12,342	2,698,938
Transportation	9,850,977	267,647	55,581	32,675	7,106,184
Retail	133,925,336	3,638,701	755,634	455,377	96,609,496
Finance,Insurance, Real Estate	21,803,876	592,403	123,022	72,390	15,728,626
Services	118,162,336	3,210,427	666,696	383,413	85,238,576
Government	3,518,414	95,594	19,852	11,677	2,538,073
Dummy	171,714	4,665	969	572	0
Total	295,673,151	8,033,328	1,668,249	983,431	213,289,257

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

Travel Profile and Impact: Outdoor

Outdoor travel had the third largest impact. The average age of the head of household for this type of travel was 46 and the mean household income was $60,000. Outdoor travel was more seasonal than the previous two types, with 44% of travel occurring during Summer and 12% in Winter (Domestic Travel Market Report, Travel Industry Association of America, 2000).

These travel parties stayed an average of 4.8 days and spent an average of $538. The average party size was 2.3 people, and 32% of parties had at least one child. Most of these travelers (55%) were college educated. The most common occupation for the head of the household was a Managerial or Professional job. This applied to 41% of travel parties. In 15% of households, the household heads were retired, and 11% worked in Technical Sales/Administrative Support. Most of the household heads (64%) were married. The majority of these households (60%) had no children living within their home.

Tables 11 and 12 show the impact of outdoor travelers on the four counties, broken down by sector. Again, the Service and Retail sectors received the greatest impact, and most of the impact was concentrated in Beaufort County.

Outdoor travelers supported 4,177 jobs in Beaufort County (3,013 of which were in Hilton Head), and over $232 million dollars in output (of which approximately $167.5 million were in Hilton Head). In Colleton County, 121 jobs were supported, with output of about $5.9 million. In Hampton, 25 jobs were supported, with nearly $1.4 million in output. In Jasper, 17 jobs were supported, with nearly $1 million in output. The impacts for Jasper, Colleton, and Hampton were only slightly less than the Historic impacts, while Beaufort was significantly less than the Historic impact.

TABLE 11

Total Employment Impact for Outdoor by County

	Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing						
	Durables	2	0	0	0	2
	Non-Durables	13	0	0	0	9
Non-Manufacturing						
	Agriculture/Fish	23	1	0	0	17
	Mining	0	0	0	0	0
	Construction	45	1	0	0	33
	Transportation	47	1	0	0	34
	Retail	2,484	72	15	10	1,792
	Finance,Insurance, Real Estate	88	3	1	0	63
	Services	1,446	42	9	6	1,043
Government		17	1	0	0	12
Dummy		12	0	0	0	9
Total		4,177	121	25	17	3,013

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

TABLE 12

Total Output Impact for Outdoor by County (2005$)

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	360,250	10,074	2,168	1,456	259,876
Non-Durables	2,129,575	56,033	12,817	8,607	1,536,229
Non-Manufacturing					
Agriculture/Fish	1,044,880	27,946	6,289	4,223	753,752
Mining	243	7	1	1	175
Construction	2,939,624	76,278	17,693	11,881	2,120,594
Transportation	7,739,927	202,301	46,584	31,283	5,583,430
Retail	105,226,888	2,750,334	633,315	425,295	75,907,456
Finance,Insurance, Real Estate	17,131,346	438,061	103,108	69,241	12,358,206
Services	92,839,200	2,300,163	558,774	375,238	66,973,160
Government	2,764,424	70,731	16,638	11,173	1,994,200
Dummy	134,916	3,473	812	545	0
Total	232,311,273	5,935,401	1,398,199	938,943	167,584,404

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

Travel Profile and Impact: Events/Festivals

Events/Festivals related travel had the least impact of all types of travel. The average age of the head of household was 43 and the mean household income was $58,400. This was also the most seasonal type of travel, with 52% of travelers visiting in the Summer, while only 11% visit in the Winter (Domestic Travel Market Report, Travel Industry Association of America, 2000).

These travel parties stayed an average of 5.8 days and spent an average of $824. The average party size was 2.8 people, and 52% of parties had at least one child. According to the report, 49% of these travelers were college educated. The most common occupation for the head of the household was a Managerial or Professional job. This applied to 38% of travel parties. In 12% of households, the household heads were retired, and 13% worked in Technical Sales/Administrative Support. Most of the household heads (66%) were married. Only 45% of these households had no children living within their home.

Tables 13 and 14 show the impact of Events/Festivals travelers on the four counties. The Service and Retail sectors still received the greatest impact, particularly in Beaufort County.

Events/Festivals supported 949 jobs in Beaufort County (685 of which were in Hilton Head), and over $52.5 million dollars in output (of which $38 million were in Hilton Head). In Colleton County, 51 jobs were supported, with output of about $2.8 million. In Hampton County, 11 jobs were supported, with nearly $600,000 in output. In Jasper County, 7 jobs were supported, with nearly $400,000 in output.

TABLE 13

Total Employment Impact for Events/Festivals by County

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	1	0	0	0	0
Non-Durables	3	0	0	0	2
Non-Manufacturing					
Agriculture/Fish	5	0	0	0	4
Mining	0	0	0	0	0
Construction	10	1	0	0	7
Transportation	11	1	0	0	8
Retail	565	30	6	4	407
Finance,Insurance, Real Estate	20	1	0	0	14
Services	329	18	4	3	237
Government	4	0	0	0	3
Dummy	3	0	0	0	2
Total	949	51	11	7	685

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

TABLE 14

Total Output Impact for Events/Festivals by County (2005$)

Industry	Beaufort	Colleton	Hampton	Jasper	Hilton Head*
Manufacturing					
Durables	81,876	4,409	916	615	59,063
Non-Durables	484,001	26,064	5,413	3,635	349,143
Non-Manufacturing					
Agriculture/Fish	237,476	12,788	2,656	1,783	171,307
Mining	55	3	1	0	40
Construction	668,110	35,979	7,472	5,017	481,953
Transportation	1,759,103	94,731	19,672	13,211	1,268,961
Retail	23,915,238	1,287,879	267,448	179,602	17,251,696
Finance,Insurance, Real Estate	3,893,549	209,675	43,542	29,240	2,808,683
Services	21,100,418	1,136,296	235,970	158,462	15,221,174
Government	628,288	33,834	7,026	4,718	453,227
Dummy	30,663	1,651	343	230	0
Total	52,798,777	2,843,309	590,459	396,513	38,087,367

***Hilton Head is not a separate impact, it is a subset of the total for Beaufort County**

**Numbers may not add up due to rounding

Travel Profile and Impact: Other

Given the varied makeup of the Other category, there was no meaningful data on age, income, or seasonality for Jasper, Colleton, and Hampton counties. We only note that this comprises 16% of all travel activity in these counties. The impact patterns were similar to previous patterns, but less meaningful. Since this category was an aggregate of numerous smaller categories, it was impossible to say which activity or activities generated most of this impact.

For this category, 94 jobs were supported in Colleton, with output of about $5.2 million. In Hampton County, 20 jobs were supported, with over $1 million in output. In Jasper County, 13 jobs were supported, with over $730,000 in output.

TABLE 15

Total Employment Impact for Other by County

Industry	Colleton	Hampton	Jasper
Manufacturing			
Durables	0	0	0
Non-Durables	0	0	0
Non-Manufacturing			
Agriculture/Fish	1	0	0
Mining	0	0	0
Construction	1	0	0
Transportation	1	0	0
Retail	56	12	8
Finance,Insurance, Real Estate	2	0	0
Services	33	7	5
Government	0	0	0
Dummy	0	0	0
Total	94	20	13

**Numbers may not add up due to rounding

TABLE 16

Total Output Impact for Other by County (2005$)

Industry	Colleton	Hampton	Jasper
Manufacturing			
Durables	8,125	1,687	1,133
Non-Durables	48,029	9,974	6,698
Non-Manufacturing			
Agriculture/Fish	23,566	4,894	3,286
Mining	5	1	1
Construction	66,299	13,768	9,246
Transportation	174,562	36,251	24,344
Retail	2,373,198	492,832	330,955
Finance,Insurance, Real Estate	386,371	80,236	53,882
Services	2,093,873	434,826	292,002
Government	62,347	12,947	8,695
Dummy	3,043	632	424
Total	5,239,418	1,088,048	730,666

**Numbers may not add up due to rounding

As stated in the Methodology, the numbers for Beaufort and Hilton Head were broken down by income. This was because we had specific data on Beaufort visitors that showed the percentage of visitors by income bracket. For visitors in the less than $25K income range (which represent 5% of Beaufort and Hilton Head visitors), the average age of the head of household was 51 and the mean household income was $15,800. These travel parties stayed an average of 3.3 days and spent an average of $265. The average party size was 1.9 people, and 21% of parties had at least one child. According to the travel report, 28% of these travelers were college educated, while 41% had only a high school diploma. In terms of occupation, 33% of household heads were retired, 14% worked in Managerial/Professional trades and 11% work in Technical Sales/Administrative Support. Only 36% of the household heads were married and 74% of these households had no children living in their home.

For visitors in the $25K-$49.9K income range (which represent 25% of Beaufort and Hilton Head visitors), the average age of the head of household was 46 and the mean household income was $37,000. These travel parties stayed an average of 3.3 days and spent an average of $352. The average party size was 2 people, and 23% of parties had at least one child. According to the travel report, 49% of these travelers were college educated, while 23% had only a high school diploma. In terms of occupation, 33% of household heads worked in Managerial/Professional trades, 19% were retired, and 11% worked in Technical Sales/Administrative Support. For this group, 57% of the household heads were married and 65% of these households had no children living in their home.

For visitors in the $50K-$74.9K income range (which represent 32% of Beaufort and Hilton Head visitors), the average age of the head of household was 46 and the mean household income was $62,000. These travel parties stayed an average of 3.4 days and spent an average of $426. The average party size was 2 people, and 24% of parties had at least one child. According to the travel report, 62% of these travelers were college educated, while 15% had only a high school diploma. In terms of occupation, 48% of household heads worked in Managerial/Professional trades, 13% were retired, and 13% worked in Technical Sales/Administrative Support. For this group, 71% of the household heads were married and 60% of these households had no children living in their home.

Lastly, visitors in the over $75K income range (which represent 37% of Beaufort and Hilton Head visitors), the average age of the head of household was 48 and the mean household income was $111,700. These travel parties stayed an average of 3.6 days and spent an average of $617. The average party size was 1.9 people, and 18% of parties had at least one child. According to the travel report, 78% of these travelers were college educated, while 7% had only a high school diploma. In terms of occupation, 65% of household heads worked in Managerial/Professional trades, 9% were retired, and 10% worked in Technical Sales/Administrative Support. For this group, 81% of the household heads were married and 61% of these households had no children living in their home.

When viewed from an income standpoint, seasonality is less significant. For all income ranges, about 30% visit in Summer, about 20% visit in Winter, and about 25% visit in Spring and Fall.

For Beaufort and Hilton Head Island (which is a portion of the Beaufort numbers), more specific categories were available to define the broad Other category. The impact of each of these categories was greater than that of Events/Festivals (excepting Sporting Events, which was the same), and considerably less than the other three categories.

Nightlife had the largest impact with 1,709 jobs in Beaufort County (1,233 of which were in Hilton Head) and over $95 million dollars in Output ($68.5 million of which were in Hilton Head). Other Activities (including Gambling) supported 1,329 jobs in Beaufort (959 in Hilton Head), and nearly $74 million in output ($53 million of which was in Hilton Head). Golf/Tennis supported 1,139 jobs in Beaufort (811 in Hilton Head) and $63 million in output (nearly $45 million of which was in Hilton Head). Sporting events supported 959 jobs in Beaufort (685 of which were in Hilton Head) and $53 million in output ($38 million of which were in Hilton Head).

TABLE 17

Other Activities

Total Employment Impact for Beaufort by Activity

Industry	Other (inc. Gambling)	Golf/Tennis	Nightlife	Sports Events
Manufacturing				
Durables	1	1	1	1
Non-Durables	4	3	5	3
Non-Manufacturing				
Agriculture/Fish	7	6	9	5
Mining	0	0	0	0
Construction	14	12	18	10
Transportation	15	13	19	11
Retail	790	677	1,016	565
Finance,Insurance, Real Estate	28	24	36	20
Services	460	394	592	329
Government	5	5	7	4
Dummy	4	3	5	3
Total	1,329	1,139	1,709	949

**Numbers may not add up due to rounding

TABLE 18

Other Activities

Total Output Impact for Beaufort by Activity (2005$)

Industry	Other (inc. Gambling)	Golf/Tennis	Nightlife	Sports Events
Manufacturing				
Durables	114,626	98,251	147,377	81,876
Non-Durables	677,601	580,801	871,202	484,001
Non-Manufacturing				
Agriculture/Fish	332,466	284,971	427,456	237,476
Mining	77	66	100	55
Construction	935,354	801,732	1,202,598	668,110
Transportation	2,462,744	2,110,924	3,166,386	1,759,103
Retail	33,481,334	28,698,288	43,047,428	23,915,238
Finance,Insurance, Real Estate	5,450,969	4,672,259	7,008,389	3,893,549
Services	29,540,584	25,320,500	37,980,748	21,100,418
Government	879,604	753,946	1,130,919	628,288
Dummy	42,928	36,796	55,194	30,663
Total	73,918,287	63,358,534	95,037,797	52,798,777

**Numbers may not add up due to rounding

TABLE 19

Other Activities

Total Employment Impact for Hilton Head by Activity

Industry	Other (inc. Gambling)	Golf/Tennis	Nightlife	Sports Events
Manufacturing				
Durables	1	1	1	0
Non-Durables	3	2	4	2
Non-Manufacturing				
Agriculture/Fish	5	4	7	4
Mining	0	0	0	0
Construction	10	9	13	7
Transportation	11	9	14	8
Retail	570	488	733	407
Finance,Insurance, Real Estate	20	17	26	14
Services	332	275	427	237
Government	4	3	5	3
Dummy	3	2	4	2
Total	959	811	1,233	685

**Numbers may not add up due to rounding

TABLE 20

Other Activities

Total Output Impact for Hilton Head by Activity (2005$)

Industry	Other (inc. Gambling)	Golf/Tennis	Nightlife	Sports Events
Manufacturing				
Durables	82,688	69,700	106,313	59,063
Non-Durables	488,800	411,566	628,457	349,143
Non-Manufacturing				
Agriculture/Fish	239,830	202,318	308,353	171,307
Mining	56	47	72	40
Construction	674,734	563,613	867,516	481,953
Transportation	1,776,546	1,490,992	2,284,130	1,268,961
Retail	24,152,374	20,662,944	31,053,052	17,251,696
Finance,Insurance, Real Estate	3,932,157	3,302,703	5,055,630	2,808,683
Services	21,309,644	17,604,194	27,398,112	15,221,174
Government	634,518	532,805	815,809	453,227
Dummy	0	26,076	0	0
Total	53,322,314	44,866,957	68,557,259	38,087,367

**Numbers may not add up due to rounding

CONCLUSIONS

This study has focused on the tourism market served by the Greater Beaufort Chamber of Commerce and has identified not only the direct and total economic impact of tourism, but has also broken the impacts out by the primary purpose of the trip. The counties that were included in this study were Colleton, Jasper, Hampton, and Beaufort. Additionally, Beaufort County was further subdivided into smaller regions to better understand their contributions to the tourism industry.[7]

Tourism in the Beaufort Area, although segmented into several businesses spanning several sectors, has a significant economic benefit to the region's economy. As indicated in the report, each direct dollar spent by a tourist not only supports the more "classic" tourism jobs (a hotel worker or specialty gift shop owner near the beach), but also supports other high paying, high skilled, and high knowledge jobs within the area. For example, a locally owned specialty gift shop owner could easily require a business consultant to setup their business, an accountant during tax season, and a banker for both the initial loan and for recurring business needs. In addition to these high paying jobs on the business level, there could be even more when looking at demands from people associated with each additional job for that gift store. That is each person added to the local or regional labor force due to the gift shop will in turn put demand for other services within the region like doctors, lawyers, and teachers.

This linkage from a tourism economy to the entire economy is shown by what is called a multiplier effect. The job multiplier for the Beaufort Area was 1.26. For every 100 jobs in the tourism industry, there were an additional 26 jobs supported in the region.

Tables 21 and 22 are summaries of the direct impact of tourism by county and by activity (a direct impact is the dollars spent from tourists). This shows that Beaufort County and more specifically Hilton Head are the biggest contributors to the tourism economy. As

[7] Please see Appendix A for the impact of sub regions within Beaufort County.

such, Beaufort County as a whole provides $728.3 million and $525.4 million of that comes directly from the Hilton Head Area.

TABLE 21

Direct Expenditures by Activity (2000$)

Activity	Colleton	Jasper	Hampton
Shopping	7,752,318	1,081,102	1,609,891
Outdoor	4,183,383	583,395	868,745
Historic	4,991,360	696,071	1,036,534
Theme Parks	1,766,638	246,367	366,870
Other	3,255,416	453,985	676,038
Total	21,949,115	3,060,919	4,558,079

TABLE 22

Direct Expenditures by Activity (2000$)

	Beaufort	Hilton Head*
Shopping	190,272,123	137,256,291
Outdoor	144,344,369	104,125,462
Historical	183,711,015	132,523,315
Theme	32,805,538	23,664,878
Nightlife	59,049,969	42,596,780
Gambling	45,927,754	33,130,829
Sports Event	32,805,538	23,664,878
Golf/Tennis	39,366,646	28,397,853
Total	728,282,953	525,360,285

*** Hilton Head is a subset of the total impact for Beaufort County**

These direct dollars shown above have a tremendous impact on the economy. Moreover, they support a significant number of jobs in other sectors of the economy, as shown in Table 23.

TABLE 23

Jobs Supported by Tourism

	Beaufort	Colleton	Hampton	Jasper	Hilton Head	Total
Jobs Created by Travel	21,076	636	132	86	15,192	21,929
Total Jobs	47,862	14,874	7,787	8,628	23,819	79,151
Percent of Total Jobs	44.03%	4.27%	1.69%	1.00%	63.78%	27.71%

Total job data is taken from the US 2000 census.
*Hilton Head is a subset of the total for Beaufort County

The Colleton County tourism economy supports a total of 636 jobs annually (4.27% of total jobs in the county). In addition, that county has a total economic impact of $34.5

million (2005$). The Jasper County tourism economy supports a total of 86 jobs annually within its economy (1.0% of total jobs in the county) and has a total economic impact of $4.8 million (2005$). The tourism economy within Hampton County supports a total 132 jobs annually (1.69% of total jobs in the county) and has a total economic impact of $7.3 million (2005$). The Beaufort County tourism economy supports a total of 21,076 jobs annually (44.03% of total jobs in the county). In addition, that county has a total economic impact of $1.2 billion (2005$). The Hilton Head tourism economy (which was included in the Beuafort impact) supports 15,192 jobs annually within its economy (63.78% of total jobs in the county) and has a total economic impact of $844.7 million (2005$).

Other findings of this study include the economic impact and tourist profile by the primary activity of the visitors (Shopping, Outdoor, Historic, Events/Festivals, and Other). As such, the two largest activities as a primary activity were Shopping and Historic travel with 26% and 25%, respectively, for the entire region. The activity with the least amount of tourism expenditures for the area was Events/Festivals with 5%.

As such, the findings section shows that a visitor that travels to this region primarily for Shopping has a mean household income of $59,500, was about 47 years old, and most likely has a college education (55%). Shopping travelers were the least seasonal with 32% of the travel occurring during the Summer. The average party size was 2.1, the average length of stay was 4.2, and average amount spent during the trip was $531. The total economic impact for the region in 2005 dollars was $323.0 million.

The findings also showed that a visitor that travels to this region primarily for Historic and Cultural Travel has a mean household income of $59,800 and was about 50 years old. Historic travelers visit mostly during Spring, Summer, and Fall months with about 23%, 39%, and 23%, respectively. The average party size was 2.1, the average length of stay was 5.1, and average amount spent during the trip was $614. The total economic impact for the region in 2005 dollars was $306.4 million.

Overall, the area served by the Greater Beaufort Chamber of Commerce has a significant economic impact on the tourism economy within the region. The total direct tourism expenditure was $757.9 million (2000$) and the total economic impact was 1.2 billion (2005$). The tourism industry in this four county area supports a total of 21,929 jobs annually or about 27.71% of all jobs in the economy.

APPENDIX A

A key component of this study, as requested by the Beaufort Chamber of Commerce, was to use Beaufort County's tourism impact and allocate it to sub regions within the county. The sub regions requested by the Chamber are shown graphically in Figure 4.

The methodology used in this allocation process was primarily based on the presence of "tourism" businesses within each sub region. Moreover, a weighted value was calculated based on direct tourism expenditures from Beaufort County by sector from IMPLAN and divided by the total expenditure from the base data for that county and sector. Those weights were used within the sub regions and applied to a detailed business database called Reference USA.

FIGURE 4
BEAUFORT COUNTY - REGIONS

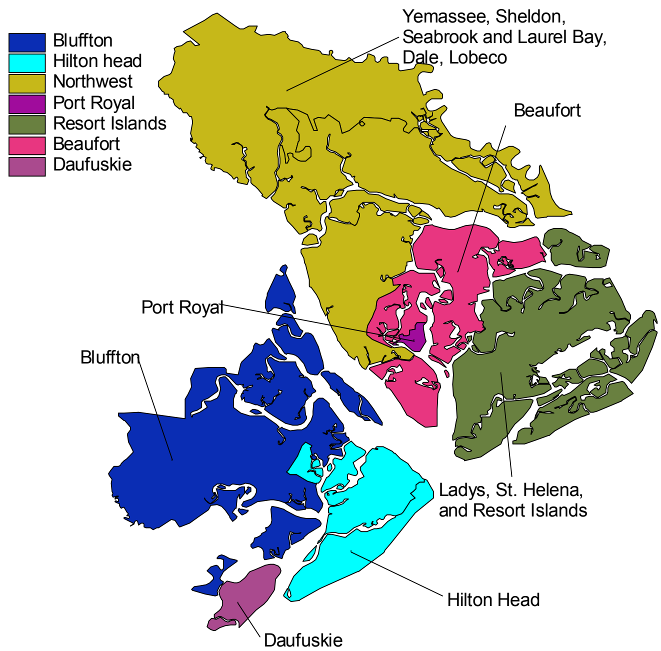

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Table 24 shows the estimated proportions of the Beaufort County impact by sub region. The largest percent of the impact was allocated to Hilton Head Island, approximately 48.4%.[1] The second and third largest regions within Beaufort County were the City of

[1] It should be noted that this is the only part of the study that has Hilton Head Island separate from Bluffton.

Beaufort and Bluffton with 15% and 13.75%, respectively. The smallest two regions were Daufuskie with 3.1% and Port Royal with 2%.

These percentages not only translate into the estimated number of visitors, but also the impacts. Therefore, Hilton Head Island was estimated to have the largest total number of visitors and the largest impact, visitors being 1.5 million (Note: other portions of this study show the visitors to Hilton Head to be higher. This is because data for Bluffton could not be separated from Hilton Head in the other portions of this study) and the total impact being $567 million. The second and third largest were the City of Beaufort and Bluffton. The City of Beaufort was estimated to have 456 thousand visitors and a total impact of $176 million. Bluffton was estimated to have slightly fewer visitors with 419 thousand and a total impact of $161 million.

TABLE 24
Total Visitors and Expenditures by
Defined Areas Within Beaufort County

Name	Percent	Visitors	Direct Impact (2005$)	Total Impact (2005$)
Yemassee, Sheldon, Seabrook and Laurel Bay, Dale, Lobeco	5.98%	182,141	49,646,016	70,147,316
Port Royal	2.00%	60,845	16,584,558	23,433,143
Hilton Head	48.40%	1,473,096	401,521,104	567,329,061
Ladys, St. Helena and Resort islands(Fripp, Harbor, Hunting)	11.67%	355,053	96,776,694	136,740,585
Bluffton	13.75%	418,591	114,095,064	161,210,569
Beaufort	15.00%	456,377	124,394,345	175,762,933
Daufuskie	3.20%	97,298	26,520,413	37,472,005

Beaufort	29901, 29902, 29903, 29905, 29907
Yemassee	29904, 29906, 29914, 29940, 29941, 29945, 29946
Port Royal	29935
Hiton Head	29925, 29926, 29928, 29938
Ladys	29920
Bluffton	29909, 29910
Daufuskie	29915

As noted previously, Hilton Head Island separate from Bluffton in this Appendix.