

**The Economic Impact  
of Travel on  
South Carolina Counties  
2016**

A Study Prepared for the  
**South Carolina Department of Parks, Recreation & Tourism**  
by the  
U.S. Travel Association  
Washington, D.C.  
August 2017



## **PREFACE**

This study was conducted by the Research Department of the U.S. Travel Association for the **South Carolina Department of Parks, Recreation & Tourism**. The study provides preliminary 2016 estimates of domestic traveler expenditures in South Carolina, as well as the employment, payroll income, and state and local tax revenue directly generated by these expenditures.

Additionally, this study provides estimates of domestic travel expenditures and employment, payroll income, and state and local tax revenue directly generated by domestic travel expenditures for each of 46 counties in South Carolina. For the purpose of comparison, related 2015 impact estimates are also included in this report.

U.S. Travel Association  
Washington, D.C.  
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## TABLE OF CONTENTS

<b>INTRODUCTION .....</b>	<b>1</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>2</b>
<b>TRAVEL IMPACT ON THE U.S. ECONOMY IN 2016 .....</b>	<b>3</b>
U.S. TRAVEL VOLUME IN 2016.....	4
TRAVEL EXPENDITURES IN 2016 .....	5
TRAVEL EMPLOYMENT IN 2016 .....	7
<b>DIRECT TRAVEL IMPACT ON THE UNITED STATES IN 2016.....</b>	<b>10</b>
<b>DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2016 .....</b>	<b>12</b>
TRAVEL EXPENDITURES .....	12
TRAVEL-SUPPORTED PAYROLL .....	14
TRAVEL-SUPPORTED EMPLOYMENT.....	16
TRAVEL-GENERATED TAX REVENUE .....	18
<b>DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA COUNTIES, 2016.....</b>	<b>22</b>
<b>COUNTY TABLES .....</b>	<b>25</b>
<b>APPENDICES.....</b>	<b>36</b>
APPENDIX A: TRAVEL ECONOMIC IMPACT MODEL .....	37
APPENDIX B: GLOSSARY OF TERMS – TEIM .....	41
APPENDIX C: TRAVEL-RELATED INDUSTRY MEASUREMENT.....	42
APPENDIX D: SOURCES OF DATA.....	45

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## LIST OF TABLES

<i>Table 1: Overall U.S. Economic Indicators, 2014-2016 .....</i>	<i>4</i>
<i>Table 2: Travel Expenditures - U.S. Nationwide.....</i>	<i>6</i>
<i>Table 3: Travel Generated Employment - U.S. Nationwide .....</i>	<i>8</i>
<i>Table 4: U.S. Travel Forecasts.....</i>	<i>9</i>
<i>Table 5: Domestic Travel Expenditures in South Carolina by Industry Sector, 2015 and 2016.....</i>	<i>13</i>
<i>Table 6: Domestic Travel-Supported Payroll in South Carolina by Industry Sector, 2015 and 2016 .....</i>	<i>15</i>
<i>Table 7: Domestic Travel-Supported Employment in South Carolina by Industry Sector, 2015 and 2016.....</i>	<i>17</i>
<i>Table 8: Domestic Travel-Generated Tax Revenue in South Carolina by Level of Government, 2015 and 2016.....</i>	<i>19</i>
<i>Table 9: Domestic Travel Impact in South Carolina - Top 5 Counties, 2015 and 2016 .....</i>	<i>23</i>
<i>Table A: Alphabetical by County, 2016.....</i>	<i>26</i>
<i>Table B: Ranking of Counties by Expenditure Levels, 2016.....</i>	<i>28</i>
<i>Table C: Percent Distribution by County, 2016.....</i>	<i>30</i>
<i>Table D: Percent Change over 2015 .....</i>	<i>32</i>
<i>Table E: Alphabetical by County, 2015.....</i>	<i>34</i>

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## **INTRODUCTION**

This report presents preliminary 2016 estimates of the impact of U.S. resident traveler spending in South Carolina, as well as the employment, payroll income and tax revenue directly generated by this spending. For the purpose of comparison, 2015 impact data are also included in this report.

All estimates of the economic impact of travel contained in this volume are the product of U.S. Travel Association's Travel Economic Impact Model (TEIM), a proprietary economic model developed expressly to indicate the expenditures, employment, payroll, and tax revenue generated by travel away from home in the United States.

The Travel Economic Impact Model (TEIM) was initially developed for the U.S. Department of the Interior to indicate the economic value of travel and tourism to states and counties. The original TEIM has been revised substantially based upon more accurate and targeted input data available from governments and the private sector. A summary of the methodology is provided in Appendix A.

U.S. residents traveling in South Carolina includes both state residents and out-of-state visitors traveling away from home overnight in paid accommodations, or on day or overnight trips to places 50 miles or more away from home. Travel commuting to and from work; travel by those operating an airplane, bus, truck, train or other form of common carrier transportation; military travel on active duty; and travel by students away at school are all excluded from the model. In addition, the payroll and employment estimates represent impact generated in the private sector and exclude public-supported payroll and employment.

Since additional data relating to travel and its economic impact in 2016 will become available subsequent to this study, U.S. Travel Association reserves the right to revise these estimates in the future.

## **EXECUTIVE SUMMARY**

- Domestic travelers directly spent more than \$13.0 billion in South Carolina during 2016, up 4.0 percent from 2015, not adjusted for inflation.
- Domestic travel-supported employees in South Carolina earned nearly \$2.5 billion in payroll income during 2016. This represented a 5.7 percent increase from 2015.
- Domestic traveler expenditures directly supported 124,200 jobs within South Carolina in 2016, a 3.1 percent increase from 2015. These jobs supported by domestic traveler spending in South Carolina composed 6.0 percent of the total state non-agricultural employment in 2016.
- Every \$104,926 spent by domestic travelers in South Carolina during 2016 supported one job.
- Domestic traveler spending in South Carolina directly generated over \$1.9 billion in tax revenue for federal, state and local governments in 2016, up 5.4 percent from 2015.
- Horry County received close to \$4.1 billion in domestic travel expenditures to lead all of South Carolina's 46 counties. Charleston County ranked second with \$2.3 billion, followed by Beaufort County with over \$1.3 billion.
- Sixteen of South Carolina's 46 counties received over \$100 million in domestic travel expenditures in 2016.
- Fourteen counties in South Carolina indicated one thousand or more jobs were directly supported by domestic travelers during 2016.



## **TRAVEL IMPACT ON THE U.S. ECONOMY IN 2016**

### **National Summary**

The U.S. economy continued to grow at a lower rate in 2016. Following a 2.9 percent and 2.6 percent increase in 2015 and 2014 respectively, the real GDP grew 1.5 percent in 2016. Economic activity in 2016, however, signaled a return of strong economic fundamentals.

The 2016 U.S. economy synchronized of business investment with growing consumer spending, adding much-needed stability after consecutive years of volatility in fixed nonresidential investment. Consumer spending remained strong throughout the year after a timid first quarter, increasing at 2.7 percent. Business investment faltered in the first quarter to start 2016, but regained its momentum to post consecutive quarters of at least 3.0 percent growth. Inventory investment also increased in the fourth quarter, contributing positively to GDP growth by over one percentage point for the first time since the first quarter of 2015.

At the same time, the U.S. economy was still facing large trade headwinds: exports on the whole had a volatile year but only increased at 0.4 percent whereas imports increased 5.0 percent. This could partly explain why business investment was lacking despite strong consumer spending numbers. Government spending also remained meager, increasing only 0.8 percent over the course of 2016.

The economy's strong fundamentals in the final quarter of 2016 were supported by a healthy and fully recovered labor market. Having recently surpassed its pre-2007-2009 recession peak of 138 million added jobs, the U.S. economy added 2.2 million jobs in 2016. Though it grew relatively slower than in 2014 and 2015, 2016 employment gains brought the economy closer to full employment, driving the unemployment rate to under five percent, and locking in recent gains for personal income and outlays.

Consequently, the Consumer Price Index (CPI), one measure of price levels, increased to 1.3 percent in 2016, up from a flat 2015. Excluding food and volatile energy prices (of which the latter has been at historic lows, driving down CPI), core CPI increased by 2.2 percent, the largest increase in core inflation since 2008. This increase in core inflation, as well as the healthy labor market, essentially drove the Federal Reserve to raise benchmark interest rates for the first time in nine years. Driven by historically low gasoline prices, U.S. Travel Association's Travel Price Index (TPI), on the other hand, remained flat for 2016, increasing by just 0.3 percent.

Moving forward to 2017, the U.S. economy endured a slow start in the first two quarters of 2017, expanding at 1.2 percent and 2.6 percent respectively over the first two quarters. Consumer spending was off to a slow start in 2017, increasing at 1.7 percent in the first quarter, while total investment and government spending both decreased 0.6 percent seasonally adjusted annualized rate (SAAR). The investment drop was due solely to a decrease in inventories, which slashed 1.5 percentage point from real GDP growth; business investment remained strong, growing 7.2 percent in the first quarter. The second quarter oversaw a modest rebound in consumer spending (2.8 percent SAAR growth) and investment (2.0 percent growth)

The U.S. employment situation continued to improve over the first seven months of 2017: average nonfarm employment increased by 1.5 percent, or (2.2 million jobs) compared to the first seven months of 2016. During the same period, the travel industry directly added 9,500 jobs per month over the first seven months of 2017 (66,800 jobs). Unemployment continued to decline, reaching a 16-year low at 4.3 percent over 2016.

Consumer prices, on the other hand, increased 1.7 percent for the 12-months ending July 2017. Over the first seven months of 2017, prices increased on average 2.1 percent compared to the first seven months in 2016. The TPI also increased by a 2.2 percent average rate for the first seven months of 2017 compared to the first seven months of 2016.

**Table 1: Overall U.S. Economic Indicators, 2014-2016**

<u>Sector</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Nominal gross domestic product (\$Billions)	17,427.6	18,120.7	18,624.5
Real gross domestic product (\$Billions) *	16,013.3	16,471.5	16,716.2
Real disposable personal income (\$Billions) *	11,939.2	12,436.0	12,608.8
Real personal consumption expenditures (\$Billions) *	10,868.4	11,264.3	11,572.1
Consumer price index**	236.7	237.0	240.0
Travel Price Index**	279.6	272.4	273.1
Nonfarm payroll employment (Millions)	139.0	141.8	144.3
Unemployment rate (%)	6.2	5.3	4.9
Percentage change from previous year			
Nominal gross domestic product	4.4%	4.0%	2.8%
Real gross domestic product	2.6%	2.9%	1.5%
Real disposable personal income	3.6%	4.2%	1.4%
Real personal consumption expenditures	2.9%	3.6%	2.7%
Consumer price index	1.6%	0.1%	1.3%
Travel Price Index	1.5%	-2.6%	0.3%
Non-farm payroll employment	1.9%	2.1%	1.7%

Source: BEA, BLS, U.S. Travel Association

\* In chained 2009 dollars

\*\* 1982-84=100

## U.S. Travel Volume in 2016

U.S. domestic travel, including leisure and business travel, increased by 1.3 percent to a total of 2.2 billion person-trips in 2016. A person-trip is defined as one person on a trip away from home overnight in paid accommodations, or on a day or overnight trip to places 50 miles or more, one-way, away from home.

Domestic leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, increased 1.7 percent in 2016 to 1.7 billion person-

trips and is forecasted to increase 1.8 percent in 2017. Leisure travel accounted for 79.2 percent of all U.S. domestic travel in 2016. Domestic business travel decreased by 0.2 percent in 2016 to 458.9 million person-trips and is expected to increase 1.6 percent in 2017.

International inbound travelers, including overnight visitors from Canada, Mexico and overseas, made 75.6 million visits to the United States in 2016. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 37.6 million in 2016 and accounted for nearly half of total international arrivals to the United States, according to U.S. Department of Commerce. Canadian overnight arrivals to the U.S decreased from 20.7 million in 2015 to 17.3 million in 2016, while Mexican overnight arrivals increased from 18.4 million in 2015 to 18.7 million in 2016.

### **Travel Expenditures in 2016**

Total domestic and international travelers spending in the U.S. increased 2.1 percent, growing from \$970 billion in 2015 to \$990 billion in 2016, not adjusted for inflation (excluding international airfare payments to the U.S airlines). After a slight lull, the U.S. Travel Association expects total domestic and international traveler expenditures to pick up to 3.1 percent growth in 2017.

Domestic travel expenditures grew 2.9 percent from 2015 to \$837 billion in 2016. International travelers, on the other hand, spent \$154 billion in the U.S. in 2016, a decrease of 2.1 percent<sup>1</sup> from 2015. It should be noted here that this traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenses on education, health care and expenditures by cross-border day-trip visitors and seasonal workers. International traveler spending is expected to increase 0.9 percent in 2017.

International airfare receipts are total passenger fares paid by international residents on U.S. flag air carriers. In 2016, international airfare receipts totaled \$38.8 billion, down 7.6 percent from 2015. In the first six months of 2017, international airfare receipts increased 1.9 percent against the first half of 2016.

Leisure traveler spending totaled \$683.1 billion in 2016, a 2.4 percent increase from 2015, accounting for 69.0 percent of all traveler expenditures. Business traveler spending increased 1.4 percent over 2015 to \$307.2 billion in 2016, 31.0 percent of all traveler expenditures.

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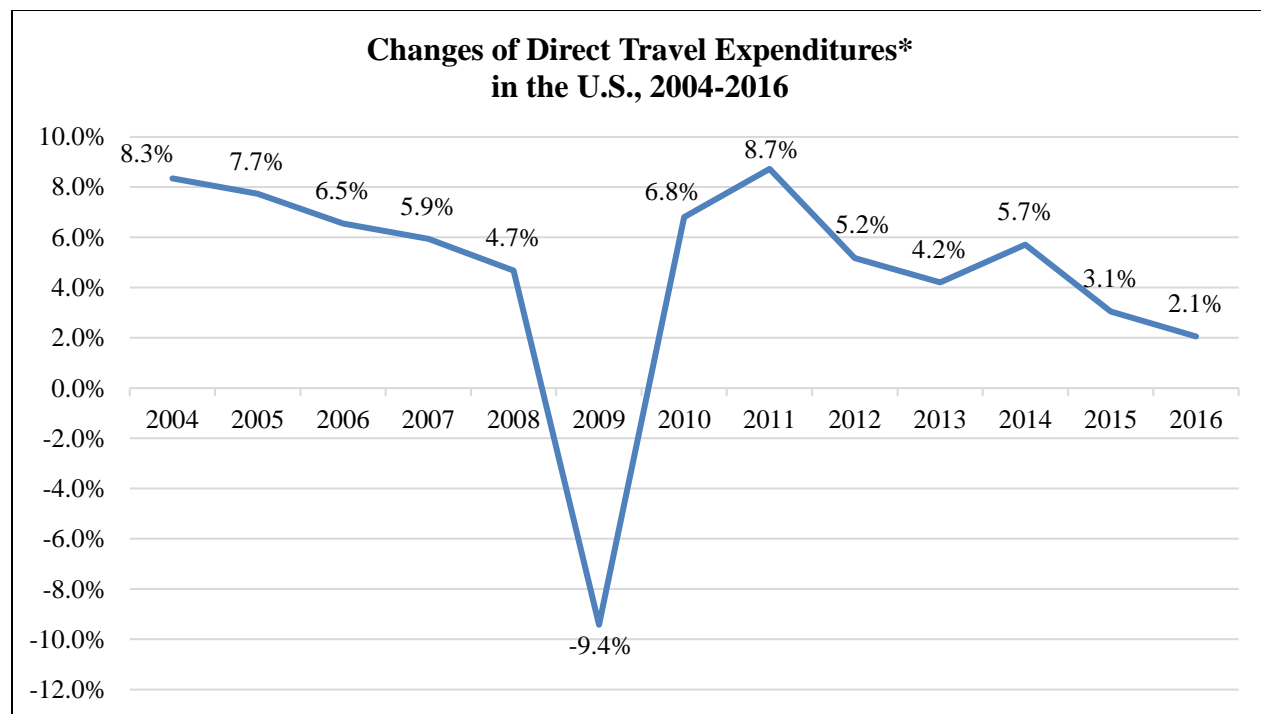
<sup>1</sup> Reflects Department of Commerce data issued in June and does not include any revisions made in July.

**Table 2: Travel Expenditures - U.S. Nationwide**

Category	2015 Spending (\$ Billions)			2016 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$164.2	\$17.6	\$181.7	\$167.3	\$17.6	\$184.8
Auto Transportation	146.4	1.9	148.3	139.4	1.9	141.3
Lodging	154.5	47.1	201.7	163.8	47.0	210.8
Foodservice	205.8	33.6	239.3	215.9	32.6	248.5
Entertainment & Recreation	83.8	12.5	96.4	88.1	12.0	100.1
General Retail Trade	58.7	44.3	103.0	62.2	42.7	104.8
<b>Total</b>	<b>\$813.4</b>	<b>\$157.0</b>	<b>\$970.4</b>	<b>\$836.6</b>	<b>\$153.7</b>	<b>\$990.3</b>

Source: U.S. Travel Association

\* Excludes international passenger fare payments.



Source: U.S. Travel Association.

\*Excludes international passenger fare payments.

## **Travel Employment in 2016**

The year 2016 marked a turning point for the U.S. labor economy, wherein it transitioned from “recovered” to “healthy.” After making a full recovery from the 2007-2009 recession in February 2015, the economy built on its past gains, reaching a new high of 144.3 million nonfarm jobs, as measured by the Labor Department. In addition to creating 2.5 million jobs, a 1.7 percent increase from 2015, the annual average unemployment rate reached a post-recession low of 4.9 percent.

After peaking at 9.6 percent in 2010, the unemployment rate fell to an average monthly rate of 5.3 percent in 2016, starting at 5.7 percent in January and ending at 5.0 percent in December. The unemployment rate fell to 4.9 percent in January and February 2017, but returned to 5.0 percent in April, still above the 4.4 percent pre-recession low.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery, accounting for 85.8 percent of the jobs recovered from 2010 to 2016. The travel industry joined healthcare; administrative services; accommodation and foodservices; and retail trade as one of the leading growth industries in terms of overall jobs created from 2010 to 2016. Travel accounted for 8.8 percent of nonfarm jobs created from 2010 to 2016, despite holding a 6 percent share of all nonfarm jobs in 2016.

In 2016, traveler spending directly supported nearly 8.6 million U.S. jobs, including both full-time and seasonal/part-time positions, up 2.4 percent from 2015. This increase translated into over 200,000 jobs added to the U.S. economy, accounting for 8.2 percent of total non-farm job growth since 2015.

These 8.6 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2016 national unemployment rate of 4.9 percent would more than double to 10.1 percent of the civilian labor force.

**Table 3: Travel Generated Employment - U.S. Nationwide**

Category	2015 Employment (Thousands)			2016 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$928.5	\$75.7	\$1,004.2	\$966.6	\$76.7	\$1,043.3
Auto Transportation	282.8	2.4	285.1	294.5	2.4	296.8
Lodging	1,282.4	285.2	1,567.6	1,309.3	271.5	1,580.8
Foodservice	2,921.1	466.1	3,387.2	3,048.9	444.9	3,493.7
Entertainment & Recreation	1,181.9	263.1	1,445.0	1,216.7	242.1	1,458.8
General Retail Trade	354.7	179.2	533.9	371.6	170.2	541.9
Travel Planning	172.7		172.7	182.2		182.2
<b>Total</b>	<b>7,124.1</b>	<b>1,271.8</b>	<b>8,395.9</b>	<b>7,389.7</b>	<b>1,207.8</b>	<b>8,597.5</b>

Source: U.S. Travel Association

\* Excludes jobs supported by international passenger fare payments.

U.S. Travel Trends, 2010-2019

**Table 4: U.S. Travel Forecasts**

	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>
Real GDP (\$Billions) *	14,783.80	15,020.60	15,354.60	15,612.20	15,982.30	16,397.20	18,500.80	19,331.90	20,253.20	21,110.0
Unemployment Rate (%)	9.6	8.9	8.1	7.4	7.4	5.3	4.9	4.6	4.7	4.6
Consumer Price Index (CPI) **	214.6	218.1	224.9	229.6	233.0	236.7	237.1	240.0	245.5	250.7
Travel Price Index (TPI) **	241.5	250.7	266.9	273.0	275.6	279.6	272.4	273.1	282.0	292.0
Total Travel Expenditures in U.S. (\$ Billions)	750.8	815.3	854.7	890.7	941.6	970.4	990.3	1,020.9	1,062.9	1,106.4
U.S. Residents	643.9	696.7	728.0	751.2	792.4	813.4	836.6	865.9	901.3	937.0
International Visitors ***	106.9	118.6	126.7	139.5	149.2	157.0	153.7	155.1	161.6	169.4
Total International Visitors to the U.S. (Millions)	60.0	62.8	66.7	70.0	75.0	77.5	75.6	75.5	76.9	80.0
Overseas Arrivals to the U.S. (Millions)	26.4	27.9	29.8	32.0	34.9	38.4	37.6	37.7	38.7	40.4
Total Domestic Person-Trips (Millions)	1,963.7	1,997.5	2,030.3	2,059.6	2,109.3	2,178.7	2,206.5	2,245.9	2,286.3	2,322.4
Business	434.3	446.6	440.7	439.4	445.7	450.8	459.8	458.9	466.2	471.2
Leisure	1,465.9	1,517.1	1,556.8	1,590.9	1,614.0	1,658.4	1,718.9	1,747.5	1,779.7	1,815.1
<b>Percent Change from Previous Year (%)</b>										
Real GDP	2.5	1.6	2.2	1.7	2.4	2.6	2.0	2.4	2.3	1.7
Consumer Price Index (CPI)	1.6	3.1	2.1	1.5	1.6	0.1	1.2	2.3	2.1	2.0
Travel Price Index (TPI)	3.8	6.5	2.3	0.9	1.5	-2.6	0.3	3.3	3.5	2.9
Total Travel Expenditures in U.S.	7.8	8.6	4.8	4.2	5.7	3.1	2.1	3.1	4.1	4.1
U.S. Residents	6.3	8.2	4.5	3.2	5.5	2.7	2.9	3.5	4.1	4.0
International Visitors	17.8	11.0	6.8	10.0	7.0	5.2	-2.1	0.9	4.2	4.8
Total International Visitors to the U.S.	8.9	4.7	6.1	5.0	NA <sup>a</sup>	NA <sup>b</sup>	-2.4	-0.1	1.9	4.0
Overseas Arrivals to the U.S.	11.0	5.8	6.7	7.7	NA <sup>a</sup>	NA <sup>b</sup>	-2.1	0.2	2.9	4.2
Total Domestic Person-Trips	3.3	1.7	1.6	1.4	2.4	3.3	1.3	1.8	1.8	1.6
Business	2.8	-1.3	-0.3	1.4	1.2	2.0	-0.2	1.6	1.1	0.8
Leisure	3.5	2.6	2.2	1.5	2.8	3.6	1.7	1.8	2.0	1.8

Sources: U.S. Travel Association

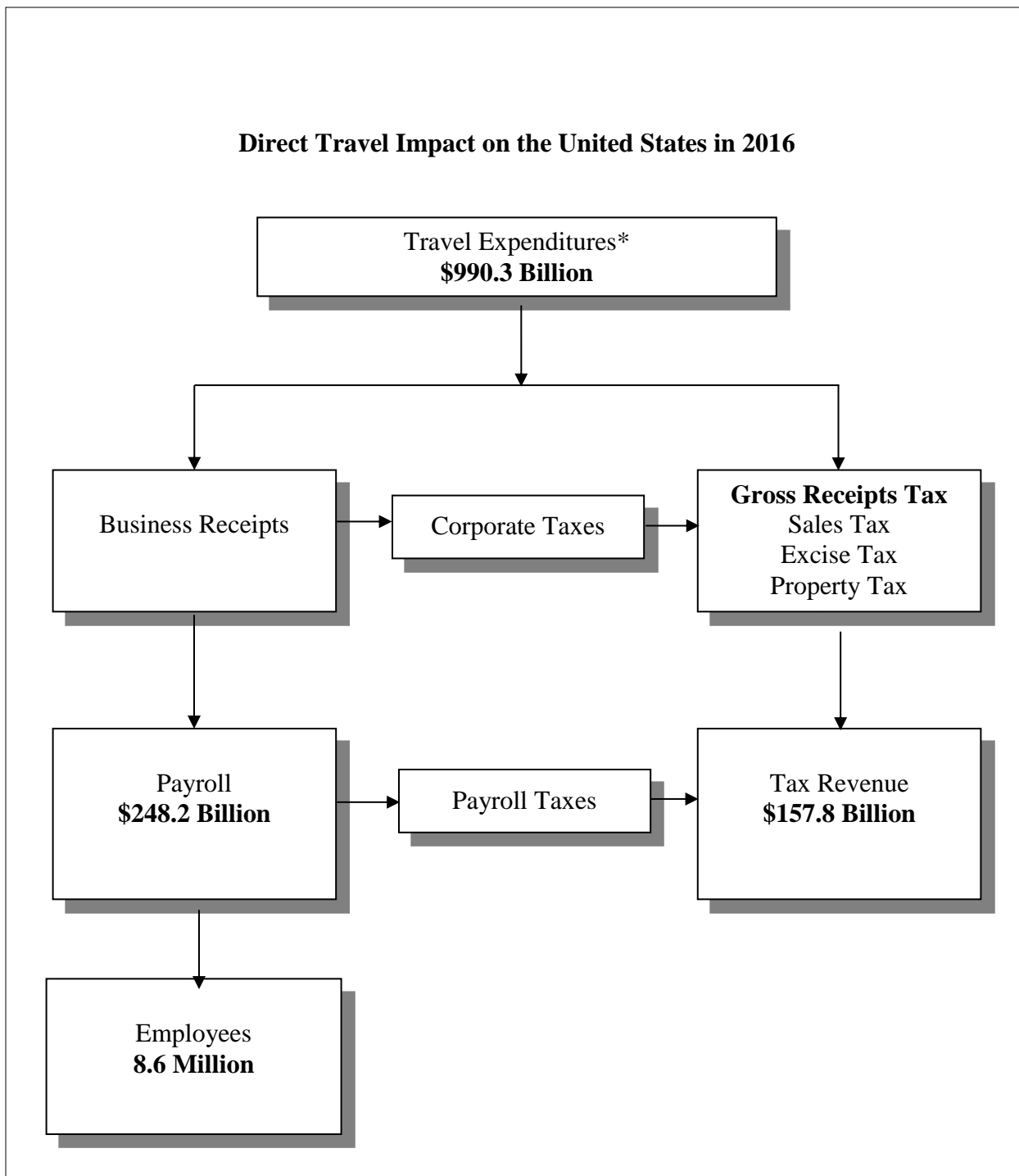
\* In chained 2009 dollars.

\*\* 1982-84=100.

\*\*\* International traveler spending does not include international passenger fares.

<sup>a</sup> According to the National Travel and Tourism Office, the completion of the I-94 automation project now provides a more accurate determination of how many nights were spent in the United States which makes it possible to be more inclusive of one-night stays (travelers from overseas countries) given that the arrival-departure record match is now more complete and accurate. With the inclusion of one-night stay travelers in 2015, arrivals data from overseas countries in 2014 and 2015 are basically not comparable.

<sup>b</sup> 2015 changes reflect a combination of additional records counted and market condition. As such, 2015 data is not comparable to earlier years.



Source: U.S. Travel Association, BEA

\*Does not include international passenger fare payments and other economic impact generated by these payments.



**DOMESTIC TRAVEL IMPACT  
ON SOUTH CAROLINA**

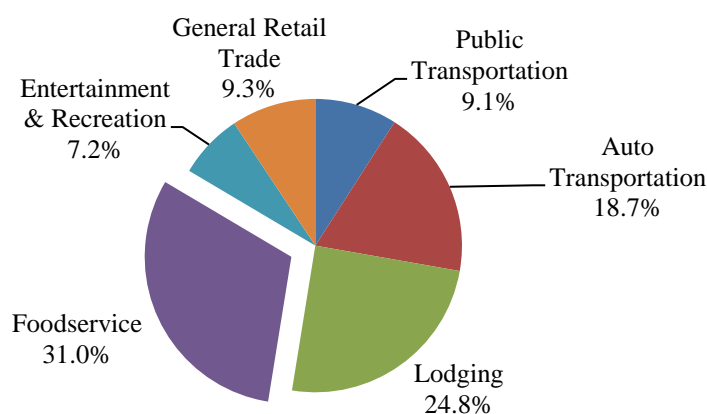
## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2016

### Travel Expenditures

During 2016, domestic travelers to South Carolina spent more than \$13 billion on transportation, lodging, food, entertainment and recreation and incidentals, up 4.0 percent from 2015 before any inflation adjustment.

- The foodservice industry received the largest amount of traveler expenditure, registering \$4.0 billion in 2016, up 4.7 percent from 2015. This accounted for 31.0 percent of the state total domestic travel spending.
- The lodging industry, which reached more than \$3.2 billion in 2016 domestic traveler expenditure receipts, is in second position. These expenditures increased 8.5 percent from 2015. Smith Travel Research’s data show that total rooms sold in South Carolina increased 4.0 percent and average room rate in the state was up 3.9 percent in 2016.
- Domestic traveler spending on auto transportation totaled \$2.4 billion in 2016, a decrease of 2.3 percent, largely due to gasoline price decreases.
- Domestic travelers spent nearly \$1.2 billion on public transportation in South Carolina during 2016, up 3.3 percent compared with 2015.

**Domestic Travel Expenditures in South Carolina  
by Industry Sector - 2016**



1. Auto transportation sector includes privately-owned vehicles that are used for trips (e.g., automobiles, trucks, campers or other recreational vehicles), gasoline service stations, and automotive rental.
2. Foodservice sector includes restaurants, grocery stores and other eating and drinking establishments.
3. Public transportation sector comprises air, intercity bus, rail, boat or ship, and taxicab or limousine service.
4. Lodging sector consists of hotels and motels, campgrounds, and ownership or rental of vacation or second homes.
5. General retail trade sector includes gifts, clothes, souvenirs and other incidental retail purchases.
6. Entertainment and recreation sector includes amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Domestic Travel Expenditures

**Table 5: Domestic Travel Expenditures in South Carolina by Industry Sector, 2015 and 2016**

<b>2016</b>	Expenditures (\$ Millions)	% of Total
Public Transportation	\$1,184.7	9.1%
Auto Transportation	2,435.6	18.7%
Lodging	3,229.2	24.8%
Foodservice	4,036.9	31.0%
Entertainment & Recreation	933.5	7.2%
<u>General Retail Trade</u>	<u>1,215.7</u>	<u>9.3%</u>
<b>Total</b>	<b>\$13,035.6</b>	<b>100.0%</b>
 <b>2015</b>		
Public Transportation	\$1,146.8	9.1%
Auto Transportation	2,493.8	19.9%
Lodging	2,975.9	23.7%
Foodservice	3,856.3	30.8%
Entertainment & Recreation	891.2	7.1%
<u>General Retail Trade</u>	<u>1,174.4</u>	<u>9.4%</u>
<b>Total</b>	<b>\$12,538.5</b>	<b>100.0%</b>
 <b>2016 over 2015</b>		
	Percent Change (%)	
Public Transportation	3.3%	
Auto Transportation	-2.3%	
Lodging	8.5%	
Foodservice	4.7%	
Entertainment & Recreation	4.7%	
<u>General Retail Trade</u>	<u>3.5%</u>	
<b>Total</b>	<b>4.0%</b>	

Source: U.S. Travel Association

## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2016

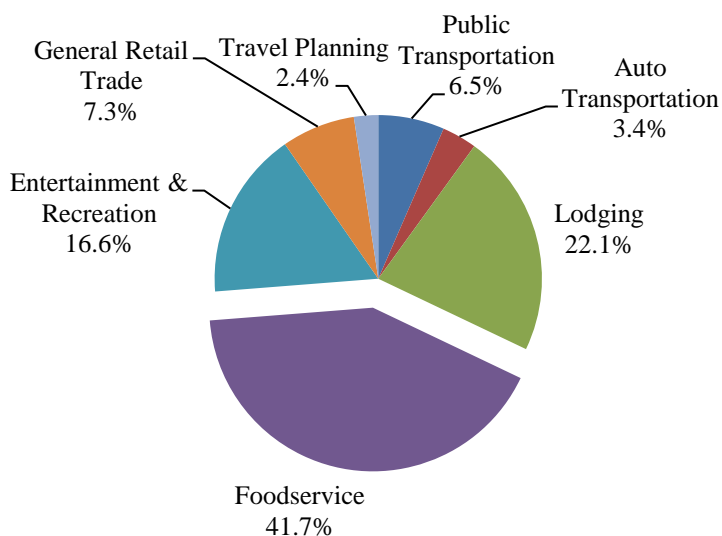
### Travel-Supported Payroll

Travel-supported payroll is the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar of travel spending supports different amounts of payroll income within the various travel industry sectors depending on the labor and the wage structure of each sector.

Domestic travel supported payroll income (wages and salaries) reached close to \$2.5 billion in 2016. This represented an increase of 5.7 percent from 2015.

- On average, every dollar spent by domestic travelers produced 19.0 cents in wage and salary income for South Carolina residents in 2016.
- In 2016, the foodservice sector posted the largest payroll generated by domestic traveler spending with \$1.0 billion, accounting for 41.7 percent of the state total domestic travel-generated payroll.
- The lodging sector ranked second with \$545.9 million in domestic travel-supported payroll income, representing 22.1 percent of the state total travel-generated payroll.
- Entertainment and recreation, the third largest contributor at \$409.9 billion, accounted for 16.6 percent of the state payroll supported from domestic travel.
- General retail trade posted \$179.5 million in total payroll for a 7.3 percent share of the state’s 2016 total domestic travel-supported payroll. This is up 4.7 percent from 2015.

**Domestic Travel-Supported Payroll in South Carolina  
by Industry Sector - 2016**



**Table 6: Domestic Travel-Supported Payroll in South Carolina by Industry Sector, 2015 and 2016**

<b>2016</b>	<b>Payroll (\$ Millions)</b>	<b>% of Total</b>
Public Transportation	\$161.6	6.5%
Auto Transportation	85.2	3.4%
Lodging	545.9	22.1%
Foodservice	1,029.7	41.7%
Entertainment & Recreation	409.9	16.6%
General Retail Trade	179.5	7.3%
Travel Planning*	59.2	2.4%
<b>Total</b>	<b>\$2,470.8</b>	<b>100.0%</b>
<b>2015</b>		
Public Transportation	\$159.8	6.8%
Auto Transportation	82.9	3.5%
Lodging	505.2	21.6%
Foodservice	968.3	41.4%
Entertainment & Recreation	397.6	17.0%
General Retail Trade	171.4	7.3%
Travel Planning*	52.6	2.2%
<b>Total</b>	<b>\$2,337.7</b>	<b>100.0%</b>
<b>2016 over 2015</b>		
	<b>Percent Change (%)</b>	
Public Transportation	1.1%	
Auto Transportation	2.7%	
Lodging	8.1%	
Foodservice	6.3%	
Entertainment & Recreation	3.1%	
General Retail Trade	4.7%	
Travel Planning*	12.5%	
<b>Total</b>	<b>5.7%</b>	

Source: U.S. Travel Association

Note: \* Refers to payroll income that goes to travel agents, tour operators, and other travel service employees who arrange passenger transportation, lodging, tours and other related services.

## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2016

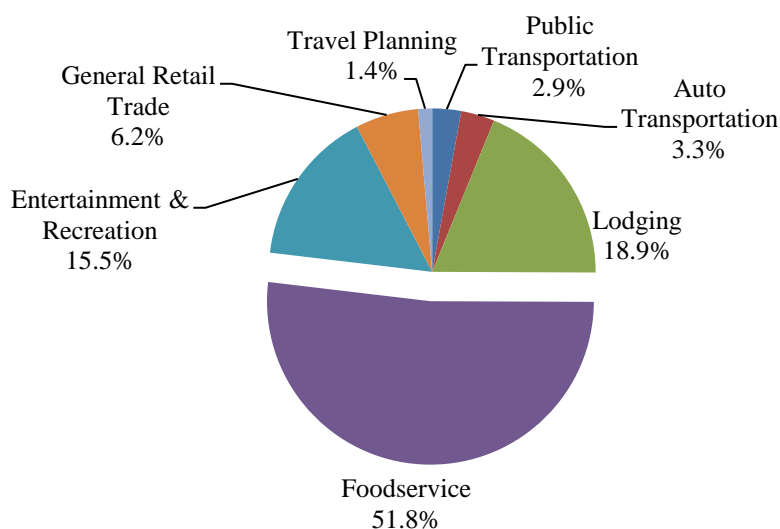
### Travel-Supported Employment

The most impressive contribution that travel and tourism makes to the South Carolina economy is the number of businesses and jobs it supports. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations.

During 2016, domestic traveler spending in South Carolina supported 124,200 jobs, including full-time and seasonal/part-time positions in the state, an increase of 3.1 percent from 2015. Every \$104,926 spent by domestic travelers in South Carolina directly supported one job.

- The 124,200 jobs generated by domestic travel in South Carolina composed 6.0 percent of the state's total non-agricultural employment during 2016. Without these jobs supported by domestic travel, South Carolina's 2016 unemployment rate of 4.8 percent would have been 5.4 percentage points higher, or the equivalent of 10.2 percent of the labor force.
- The foodservice sector, which includes restaurants and other eating and drinking places, provided more jobs than any other industry sector. During 2016, domestic traveler spending in this sector supported 64,400 jobs, accounting for over half of the state total jobs supported by domestic travel. The labor-intensiveness of these businesses and the large proportion of travel expenditures spent on food service together contribute to the importance of this sector.
- Domestic travel-supported employment in the lodging sector reached 23,500 jobs in 2016, which accounts for 18.9 percent of South Carolina's total jobs generated by domestic travel in 2016.

**Domestic Travel-Supported Employment  
in South Carolina by Industry Sector - 2016**



**Table 7: Domestic Travel-Supported Employment in South Carolina by Industry Sector, 2015 and 2016**

<b>2016</b>	Employment (Thousands)	% of Total
Public Transportation	3.5	2.9%
Auto Transportation	4.1	3.3%
Lodging	23.5	18.9%
Foodservice	64.4	51.8%
Entertainment & Recreation	19.3	15.5%
General Retail Trade	7.7	6.2%
Travel Planning*	1.7	1.4%
<b>Total</b>	<b>124.2</b>	<b>100.0%</b>
<b>2015</b>		
Public Transportation	3.5	2.9%
Auto Transportation	4.0	3.3%
Lodging	22.6	18.7%
Foodservice	62.4	51.8%
Entertainment & Recreation	18.9	15.7%
General Retail Trade	7.6	6.3%
Travel Planning*	1.5	1.2%
<b>Total</b>	<b>120.5</b>	<b>100.0%</b>
<b>2016 over 2015</b>		
	Percent Change (%)	
Public Transportation	0.6%	
Auto Transportation	2.5%	
Lodging	4.1%	
Foodservice	3.2%	
Entertainment & Recreation	2.0%	
General Retail Trade	1.9%	
Travel Planning*	15.4%	
<b>Total</b>	<b>3.1%</b>	

Source: U.S. Travel Association

Note: \* Refers to jobs created in travel arrangement firms such as travel agencies, wholesale and retail tour companies, and other travel-related service businesses.

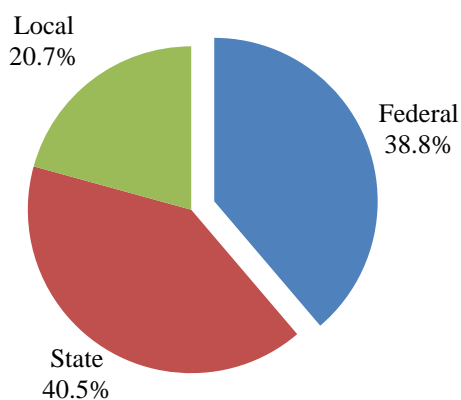
## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA – 2016

### Travel-Generated Tax Revenue

Travel tax receipts are the federal, state and local tax revenues attributable to travel spending in South Carolina. Travel-generated tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public programs.

- In 2016, total tax revenue generated by domestic traveler spending in South Carolina reached \$1.9 billion, up 5.4 percent from 2015. On average, each travel dollar spent by domestic travelers in South Carolina produced 14.9 cents in tax receipts for federal, state and local governments in 2016.
- Domestic traveler spending in South Carolina generated \$751.6 million for the federal government in 2016. This represents 38.8 percent of all domestic travel-generated tax collections in the state. Each dollar spent by domestic travelers in South Carolina produced 5.8 cents for federal tax coffers.
- Spending by domestic travelers in South Carolina also generated \$785.2 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 40.5 percent of all domestic travel-generated tax revenue for 2016 collected in the state. On average, each domestic travel dollar produced 6.0 cents in state tax receipts. Total tax revenue generated by domestic travel for South Carolina state government increased 6.3 percent from 2015.
- Local governments in South Carolina directly benefited from domestic travel as well. During 2016, domestic travel spending generated \$401.7 million in sales and property tax revenue for the local governments, 20.7 percent of total domestic travel-generated tax revenue in the state. Each travel dollar produced 3.1 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue  
in South Carolina by Level of Government - 2016**





**Table 8: Domestic Travel-Generated Tax Revenue in South Carolina by Level of Government, 2015 and 2016**

<i><b>2016</b></i>	Tax Revenue (\$ Millions)	% of Total
Federal Tax	\$751.6	38.8%
State tax	785.2	40.5%
Local Tax	401.7	20.7%
<b>Total</b>	<b>\$1,938.5</b>	<b>100.0%</b>
<i><b>2015</b></i>		
Federal Tax	\$714.3	38.9%
State tax	738.6	40.2%
Local Tax	385.7	21.0%
<b>Total</b>	<b>\$1,838.5</b>	<b>100.0%</b>
<i><b>2016 over 2015</b></i>		
	Percent Change (%)	
Federal Tax	5.2%	
State tax	6.3%	
Local Tax	4.2%	
<b>Total</b>	<b>5.4%</b>	

Source: U.S. Travel Association

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**DOMESTIC TRAVEL IMPACT  
ON SOUTH CAROLINA COUNTIES**

## **DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA COUNTIES, 2016**

Domestic travelers spent over \$13.0 billion while traveling in South Carolina during 2016, up 4.0 percent from 2015.

The top five counties in South Carolina received \$9.6 billion in direct domestic travel expenditures, 73.3 percent of the state total. Domestic travel spending in the top five counties supported nearly \$1.9 billion in payroll (75.9 percent of the state total) and 96,200 jobs (77.4 percent of the state total) in 2016.

Additionally, domestic travel expenditures in the top five counties generated \$575.3 million in tax revenue for the state treasury (up 6.1 percent from 2015 and comprising 73.3 percent of the state total) and \$302.7 million in tax revenue for local governments (75.3 percent of the state total) during 2016.

### **Domestic Travel Impact in Top 5 Counties**

**Horry County**, which includes the resort area of Myrtle Beach, led all counties in travel expenditures, payroll income and jobs directly generated by domestic traveler spending in 2016. Domestic travel expenditures in Horry County reached nearly \$4.1 billion, accounting for 31.3 percent of the state total. These expenditures supported \$776.2 million in payroll income (a 5.9 percent increase from the previous year) and 41,400 jobs for area residents.

**Charleston County** ranked second with \$2.3 billion in domestic traveler spending in 2016, representing 17.8 percent of the state total. The payroll income and jobs directly attributable to domestic traveler spending reached \$462.7 million and 23,700 jobs.

**Beaufort County**, which includes the resort area of Hilton Head Island, posted over \$1.3 billion in domestic traveler expenditures to rank third or 10.0 percent of the state total. These expenditures supported \$249.6 million in payroll as well as 13,800 jobs within the county.

**Greenville County** received nearly \$1.2 billion from domestic travelers, 9.1 percent of the state total, to rank fourth in the state. These domestic travel expenditures benefited area residents with \$263.7 million in wages and salaries and 10,300 jobs.

**Richland County** ranked fifth with \$663.3 million in domestic travel expenditures in 2016 or 5.1 percent of the state total. These expenditures by domestic travelers supported \$122.1 million in payroll income and 6,900 thousand jobs for the area residents.

**Table 9: Domestic Travel Impact in South Carolina - Top 5 Counties, 2015 and 2016**

<b>2016 Impact</b>					
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
HORRY	\$4,081.5	\$776.2	41.4	\$258.3	\$152.2
CHARLESTON	2,318.3	462.7	23.7	138.8	76.2
BEAUFORT	1,304.3	249.6	13.8	80.9	39.6
GREENVILLE	1,187.2	263.7	10.3	53.5	18.8
RICHLAND	663.3	122.1	6.9	43.7	16.0
Top Five County Total	\$9,554.6	\$1,874.3	96.2	\$575.3	\$302.7
State Total	\$13,035.6	\$2,470.8	124.2	\$785.2	\$401.7
Share of Top 5 Counties	73.3%	75.9%	77.4%	73.3%	75.3%
<b>2015 Impact</b>					
HORRY	\$3,924.1	\$733.0	40.2	\$244.4	\$147.4
CHARLESTON	2,224.8	434.9	22.9	130.6	73.4
BEAUFORT	1,251.5	237.6	13.5	75.7	37.2
GREENVILLE	1,144.9	253.5	10.0	50.2	17.5
RICHLAND	640.2	115.3	6.7	41.1	15.4
Top Five County Total	\$9,185.6	\$1,774.2	93.3	\$542.0	\$290.8
State Total	\$12,538.5	\$2,337.7	120.5	\$738.6	\$385.7
Share of Top 5 Counties	73.3%	75.9%	77.4%	73.4%	75.4%
<b>Percent Change 2016 over 2015</b>					
HORRY	4.0%	5.9%	3.1%	5.7%	3.3%
CHARLESTON	4.2%	6.4%	3.8%	6.3%	3.7%
BEAUFORT	4.2%	5.0%	2.3%	6.9%	6.6%
GREENVILLE	3.7%	4.0%	3.1%	6.5%	7.6%
RICHLAND	3.6%	5.9%	3.1%	6.4%	3.7%
Top Five County Total	4.0%	5.6%	3.1%	6.1%	4.1%
State Total	4.0%	5.7%	3.1%	6.3%	4.2%

Source: U.S. Travel Association

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## COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the U.S. Travel Association's Travel Economic Impact Model for South Carolina in 2016 and 2015. The estimates presented are for direct domestic travel expenditures and related economic impact.

- Table A shows the counties listed alphabetically, with 2016 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.
- Table B ranks the counties in order of 2016 travel expenditures from highest to lowest.
- Table C shows the percent distribution for each impact measure in 2016.
- Table D shows the percent change in 2016 over 2015 estimates for each of the measures of economic impact.
- Table E shows the counties listed alphabetically, with 2015 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

Table A: Alphabetical by County, 2016

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table A: Alphabetical by County, 2016</b>					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
ABBEVILLE	\$7.10	\$0.98	0.05	\$0.45	\$0.49
AIKEN	126.10	20.69	0.98	7.36	2.61
ALLENDALE	4.02	0.61	0.04	0.29	0.15
ANDERSON	171.55	25.34	1.38	12.34	4.83
BAMBERG	6.55	0.92	0.05	0.45	0.21
BARNWELL	9.65	1.48	0.08	0.65	0.25
BEAUFORT	1,304.26	249.57	13.85	80.92	39.61
BERKELEY	129.67	21.70	1.07	8.81	4.42
CALHOUN	3.13	0.41	0.02	0.21	0.20
CHARLESTON	2,318.26	462.71	23.74	138.83	76.15
CHEROKEE	40.76	7.19	0.38	2.84	0.87
CHESTER	24.91	4.04	0.22	1.74	0.46
CHESTERFIELD	17.70	2.80	0.15	1.26	0.69
CLARENDON	52.30	7.46	0.37	3.32	3.54
COLLETON	113.97	20.78	1.08	7.49	3.42
DARLINGTON	34.82	5.26	0.28	2.61	1.00
DILLON	40.93	7.60	0.42	2.85	1.04
DORCHESTER	92.07	16.34	0.82	6.77	1.79
EDGEFIELD	8.88	1.32	0.06	0.67	0.38
FAIRFIELD	13.95	2.06	0.10	0.87	0.87
FLORENCE	311.72	58.77	2.68	17.73	7.53
GEORGETOWN	333.04	58.85	3.17	20.70	13.89
GREENVILLE	1,187.25	263.71	10.31	53.52	18.81
GREENWOOD	51.04	8.59	0.46	3.60	1.14
HAMPTON	12.58	2.19	0.12	0.86	0.25
HORRY	4,081.53	776.20	41.41	258.32	152.18
JASPER	65.42	12.54	0.70	4.35	2.21



Table A: Alphabetical by County, 2016

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table A: Alphabetical by County, 2016 (Continued)</b>					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
KERSHAW	53.25	8.42	0.42	3.59	2.43
LANCASTER	31.86	5.11	0.28	2.09	0.87
LAURENS	50.72	8.04	0.38	3.36	2.41
LEE	4.86	0.62	0.04	0.34	0.19
LEXINGTON	547.42	100.63	3.40	21.05	11.66
MCCORMICK	7.93	1.47	0.09	0.49	0.24
MARION	13.11	1.75	0.09	0.92	0.55
MARLBORO	11.21	1.77	0.09	0.74	0.33
NEWBERRY	33.48	5.01	0.25	2.22	1.78
OCONEE	61.74	9.56	0.47	4.09	3.20
ORANGEBURG	141.95	24.35	1.31	9.40	4.85
PICKENS	105.14	19.07	0.92	7.08	3.42
RICHLAND	663.27	122.09	6.90	43.70	15.96
SALUDA	4.27	0.50	0.02	0.29	0.27
SPARTANBURG	406.00	63.24	2.50	22.27	6.56
SUMTER	87.90	15.64	0.80	6.17	2.12
UNION	12.11	1.92	0.10	0.91	0.19
WILLIAMSBURG	9.42	1.14	0.06	0.73	0.30
<u>YORK</u>	<u>226.80</u>	<u>40.31</u>	<u>2.15</u>	<u>15.90</u>	<u>5.42</u>
<b>State Totals</b>	<b>\$13,035.61</b>	<b>\$2,470.77</b>	<b>124.24</b>	<b>\$785.16</b>	<b>\$401.74</b>

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Table B: Ranking of Counties by Expenditure Levels, 2016

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table B: Ranking of Counties by Expenditure Levels, 2016</b>					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
HORRY	\$4,081.53	\$776.20	41.41	\$258.32	\$152.18
CHARLESTON	2,318.26	462.71	23.74	138.83	76.15
BEAUFORT	1,304.26	249.57	13.85	80.92	39.61
GREENVILLE	1,187.25	263.71	10.31	53.52	18.81
RICHLAND	663.27	122.09	6.90	43.70	15.96
LEXINGTON	547.42	100.63	3.40	21.05	11.66
SPARTANBURG	406.00	63.24	2.50	22.27	6.56
GEORGETOWN	333.04	58.85	3.17	20.70	13.89
FLORENCE	311.72	58.77	2.68	17.73	7.53
YORK	226.80	40.31	2.15	15.90	5.42
ANDERSON	171.55	25.34	1.38	12.34	4.83
ORANGEBURG	141.95	24.35	1.31	9.40	4.85
BERKELEY	129.67	21.70	1.07	8.81	4.42
AIKEN	126.10	20.69	0.98	7.36	2.61
COLLETON	113.97	20.78	1.08	7.49	3.42
PICKENS	105.14	19.07	0.92	7.08	3.42
DORCHESTER	92.07	16.34	0.82	6.77	1.79
SUMTER	87.90	15.64	0.80	6.17	2.12
JASPER	65.42	12.54	0.70	4.35	2.21
OCONEE	61.74	9.56	0.47	4.09	3.20
KERSHAW	53.25	8.42	0.42	3.59	2.43
CLARENDON	52.30	7.46	0.37	3.32	3.54
GREENWOOD	51.04	8.59	0.46	3.60	1.14
LAURENS	50.72	8.04	0.38	3.36	2.41
DILLON	40.93	7.60	0.42	2.85	1.04
CHEROKEE	40.76	7.19	0.38	2.84	0.87
DARLINGTON	34.82	5.26	0.28	2.61	1.00

Table B: Ranking of Counties by Expenditure Levels, 2016

<b>2016 Impact of Travel on South Carolina</b>						
<b>Table B: Ranking of Counties by Expenditure Levels, 2016 (Continued)</b>						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
NEWBERRY	33.48	5.01	0.25	2.22	1.78	
LANCASTER	31.86	5.11	0.28	2.09	0.87	
CHESTER	24.91	4.04	0.22	1.74	0.46	
CHESTERFIELD	17.70	2.80	0.15	1.26	0.69	
FAIRFIELD	13.95	2.06	0.10	0.87	0.87	
MARION	13.11	1.75	0.09	0.92	0.55	
HAMPTON	12.58	2.19	0.12	0.86	0.25	
UNION	12.11	1.92	0.10	0.91	0.19	
MARLBORO	11.21	1.77	0.09	0.74	0.33	
BARNWELL	9.65	1.48	0.08	0.65	0.25	
WILLIAMSBURG	9.42	1.14	0.06	0.73	0.30	
EDGEFIELD	8.88	1.32	0.06	0.67	0.38	
MCCORMICK	7.93	1.47	0.09	0.49	0.24	
ABBEVILLE	7.10	0.98	0.05	0.45	0.49	
BAMBERG	6.55	0.92	0.05	0.45	0.21	
LEE	4.86	0.62	0.04	0.34	0.19	
SALUDA	4.27	0.50	0.02	0.29	0.27	
ALLENDALE	4.02	0.61	0.04	0.29	0.15	
<u>CALHOUN</u>	<u>3.13</u>	<u>0.41</u>	<u>0.02</u>	<u>0.21</u>	<u>0.20</u>	
<b>State Totals</b>	<b>\$13,035.61</b>	<b>\$2,470.77</b>	<b>124.24</b>	<b>\$785.16</b>	<b>\$401.74</b>	

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Table C: Percent Distribution by County, 2016

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table C: Percent Distribution by County, 2016</b>					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ABBEVILLE	0.05%	0.04%	0.04%	0.06%	0.12%
AIKEN	0.97%	0.84%	0.79%	0.94%	0.65%
ALLENDALE	0.03%	0.02%	0.03%	0.04%	0.04%
ANDERSON	1.32%	1.03%	1.11%	1.57%	1.20%
BAMBERG	0.05%	0.04%	0.04%	0.06%	0.05%
BARNWELL	0.07%	0.06%	0.06%	0.08%	0.06%
BEAUFORT	10.01%	10.10%	11.15%	10.31%	9.86%
BERKELEY	0.99%	0.88%	0.86%	1.12%	1.10%
CALHOUN	0.02%	0.02%	0.02%	0.03%	0.05%
CHARLESTON	17.78%	18.73%	19.11%	17.68%	18.96%
CHEROKEE	0.31%	0.29%	0.31%	0.36%	0.22%
CHESTER	0.19%	0.16%	0.18%	0.22%	0.11%
CHESTERFIELD	0.14%	0.11%	0.12%	0.16%	0.17%
CLARENDON	0.40%	0.30%	0.30%	0.42%	0.88%
COLLETON	0.87%	0.84%	0.87%	0.95%	0.85%
DARLINGTON	0.27%	0.21%	0.23%	0.33%	0.25%
DILLON	0.31%	0.31%	0.33%	0.36%	0.26%
DORCHESTER	0.71%	0.66%	0.66%	0.86%	0.45%
EDGEFIELD	0.07%	0.05%	0.05%	0.09%	0.09%
FAIRFIELD	0.11%	0.08%	0.08%	0.11%	0.22%
FLORENCE	2.39%	2.38%	2.16%	2.26%	1.87%
GEORGETOWN	2.55%	2.38%	2.55%	2.64%	3.46%
GREENVILLE	9.11%	10.67%	8.30%	6.82%	4.68%
GREENWOOD	0.39%	0.35%	0.37%	0.46%	0.28%
HAMPTON	0.10%	0.09%	0.09%	0.11%	0.06%
HORRY	31.31%	31.42%	33.33%	32.90%	37.88%
JASPER	0.50%	0.51%	0.57%	0.55%	0.55%

Table C: Percent Distribution by County, 2016

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table C: Percent Distribution by County, 2016 (Continued)</b>					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KERSHAW	0.41%	0.34%	0.34%	0.46%	0.61%
LANCASTER	0.24%	0.21%	0.22%	0.27%	0.22%
LAURENS	0.39%	0.33%	0.31%	0.43%	0.60%
LEE	0.04%	0.03%	0.03%	0.04%	0.05%
LEXINGTON	4.20%	4.07%	2.74%	2.68%	2.90%
MCCORMICK	0.06%	0.06%	0.07%	0.06%	0.06%
MARION	0.10%	0.07%	0.07%	0.12%	0.14%
MARLBORO	0.09%	0.07%	0.07%	0.09%	0.08%
NEWBERRY	0.26%	0.20%	0.20%	0.28%	0.44%
OCONEE	0.47%	0.39%	0.38%	0.52%	0.80%
ORANGEBURG	1.09%	0.99%	1.05%	1.20%	1.21%
PICKENS	0.81%	0.77%	0.74%	0.90%	0.85%
RICHLAND	5.09%	4.94%	5.55%	5.57%	3.97%
SALUDA	0.03%	0.02%	0.01%	0.04%	0.07%
SPARTANBURG	3.11%	2.56%	2.01%	2.84%	1.63%
SUMTER	0.67%	0.63%	0.65%	0.79%	0.53%
UNION	0.09%	0.08%	0.08%	0.12%	0.05%
WILLIAMSBURG	0.07%	0.05%	0.05%	0.09%	0.08%
<u>YORK</u>	<u>1.74%</u>	<u>1.63%</u>	<u>1.73%</u>	<u>2.03%</u>	<u>1.35%</u>
<b>State Totals</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

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Table D: Percent Change over 2015

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table D: Percent Change over 2015</b>					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ABBEVILLE	1.81%	3.20%	0.16%	3.80%	1.38%
AIKEN	3.84%	6.10%	3.52%	7.53%	4.88%
ALLENDALE	-0.35%	2.20%	-0.24%	3.54%	-10.25%
ANDERSON	4.20%	6.98%	3.61%	8.83%	7.93%
BAMBERG	1.00%	3.01%	0.24%	3.18%	0.12%
BARNWELL	2.72%	5.52%	3.05%	4.85%	1.88%
BEAUFORT	4.21%	5.04%	2.33%	6.91%	6.55%
BERKELEY	4.58%	7.69%	3.54%	6.60%	4.01%
CALHOUN	0.18%	2.39%	-0.12%	3.13%	-0.54%
CHARLESTON	4.20%	6.41%	3.83%	6.32%	3.70%
CHEROKEE	2.25%	4.05%	2.55%	4.86%	1.83%
CHESTER	4.33%	5.78%	1.99%	9.17%	5.61%
CHESTERFIELD	0.71%	3.46%	0.53%	4.41%	0.55%
CLARENDON	4.60%	5.60%	2.63%	6.77%	4.21%
COLLETON	5.02%	6.75%	3.80%	7.94%	5.51%
DARLINGTON	4.10%	6.71%	4.10%	9.68%	6.42%
DILLON	4.09%	7.35%	5.04%	7.04%	4.14%
DORCHESTER	4.14%	8.38%	5.78%	7.92%	4.95%
EDGEFIELD	-0.50%	2.12%	0.11%	3.92%	-0.82%
FAIRFIELD	1.70%	2.99%	1.66%	2.71%	0.52%
FLORENCE	2.98%	4.42%	1.86%	4.84%	2.20%
GEORGETOWN	3.60%	5.01%	1.90%	5.44%	3.86%
GREENVILLE	3.70%	4.02%	3.05%	6.53%	7.63%
GREENWOOD	1.43%	2.51%	1.20%	4.29%	1.75%
HAMPTON	-0.28%	1.98%	-0.49%	2.13%	-1.82%
HORRY	4.01%	5.90%	3.06%	5.69%	3.27%
JASPER	6.06%	7.61%	4.39%	9.71%	6.68%

Table D: Percent Change over 2015

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table D: Percent Change over 2015 (Continued)</b>					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KERSHAW	5.16%	6.69%	4.05%	7.81%	5.45%
LANCASTER	4.24%	6.64%	3.43%	6.19%	3.62%
LAURENS	2.86%	3.96%	1.63%	4.92%	2.47%
LEE	2.97%	4.23%	2.35%	5.48%	2.41%
LEXINGTON	4.04%	5.23%	3.12%	7.24%	5.21%
MCCORMICK	2.54%	4.47%	2.00%	3.73%	1.32%
MARION	0.31%	1.92%	0.01%	2.71%	-0.50%
MARLBORO	2.86%	5.56%	3.54%	5.10%	2.05%
NEWBERRY	0.54%	2.07%	0.65%	1.30%	-1.38%
OCONEE	5.72%	7.04%	3.88%	8.53%	7.76%
ORANGEBURG	2.86%	4.64%	1.78%	5.53%	2.90%
PICKENS	3.40%	10.36%	3.10%	6.18%	2.92%
RICHLAND	3.60%	5.93%	3.12%	6.42%	3.69%
SALUDA	0.38%	2.94%	0.09%	2.95%	-0.42%
SPARTANBURG	4.06%	5.77%	3.82%	7.58%	8.46%
SUMTER	3.42%	5.32%	3.04%	5.91%	3.84%
UNION	0.15%	3.46%	1.03%	4.38%	-0.29%
WILLIAMSBURG	1.55%	4.58%	1.62%	6.30%	2.92%
<u>YORK</u>	<u>5.42%</u>	<u>8.58%</u>	<u>4.86%</u>	<u>9.30%</u>	<u>6.67%</u>
<b>State Totals</b>	<b>3.96%</b>	<b>5.69%</b>	<b>3.13%</b>	<b>6.31%</b>	<b>4.17%</b>

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Table E: Alphabetical by County, 2015

<b>2015 Impact of Travel on South Carolina</b>					
<b>Table E: Alphabetical by County, 2015</b>					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
ABBEVILLE	\$6.97	\$0.95	0.05	\$0.43	\$0.48
AIKEN	121.44	19.50	0.95	6.84	2.49
ALLENDALE	4.04	0.60	0.04	0.28	0.16
ANDERSON	164.63	23.69	1.33	11.34	4.47
BAMBERG	6.48	0.90	0.05	0.44	0.21
BARNWELL	9.39	1.40	0.08	0.62	0.25
BEAUFORT	1,251.53	237.59	13.53	75.70	37.18
BERKELEY	123.98	20.15	1.03	8.27	4.25
CALHOUN	3.12	0.40	0.02	0.20	0.20
CHARLESTON	2,224.81	434.86	22.86	130.57	73.44
CHEROKEE	39.86	6.91	0.37	2.71	0.85
CHESTER	23.88	3.82	0.21	1.59	0.43
CHESTERFIELD	17.57	2.71	0.15	1.21	0.68
CLARENDON	50.00	7.07	0.36	3.11	3.39
COLLETON	108.53	19.47	1.04	6.94	3.24
DARLINGTON	33.45	4.93	0.27	2.38	0.94
DILLON	39.32	7.08	0.40	2.67	1.00
DORCHESTER	88.41	15.08	0.78	6.27	1.71
EDGEFIELD	8.92	1.29	0.06	0.65	0.38
FAIRFIELD	13.72	2.00	0.10	0.85	0.87
FLORENCE	302.70	56.28	2.63	16.91	7.36
GEORGETOWN	321.47	56.05	3.11	19.63	13.38
GREENVILLE	1,144.93	253.52	10.01	50.24	17.48
GREENWOOD	50.32	8.38	0.45	3.45	1.13
HAMPTON	12.62	2.15	0.12	0.84	0.26
HORRY	3,924.10	732.96	40.18	244.42	147.36
JASPER	61.69	11.65	0.67	3.96	2.07



Table E: Alphabetical by County, 2015

<b>2016 Impact of Travel on South Carolina</b>					
<b>Table E: Alphabetical by County, 2015 (Continued)</b>					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
KERSHAW	50.63	7.89	0.40	3.33	2.31
LANCASTER	30.57	4.79	0.27	1.97	0.84
LAURENS	49.31	7.74	0.38	3.21	2.35
LEE	4.72	0.60	0.04	0.33	0.18
LEXINGTON	526.18	95.62	3.30	19.63	11.08
MCCORMICK	7.73	1.40	0.08	0.47	0.24
MARION	13.07	1.72	0.09	0.89	0.56
MARLBORO	10.90	1.68	0.09	0.71	0.33
NEWBERRY	33.30	4.90	0.24	2.19	1.80
OCONEE	58.40	8.93	0.45	3.77	2.97
ORANGEBURG	138.00	23.27	1.28	8.90	4.72
PICKENS	101.69	17.28	0.89	6.67	3.33
RICHLAND	640.24	115.26	6.69	41.06	15.39
SALUDA	4.26	0.49	0.02	0.28	0.27
SPARTANBURG	390.15	59.79	2.41	20.70	6.05
SUMTER	85.00	14.85	0.78	5.83	2.04
UNION	12.09	1.86	0.10	0.88	0.19
WILLIAMSBURG	9.27	1.09	0.06	0.68	0.29
<u>YORK</u>	<u>215.13</u>	<u>37.13</u>	<u>2.05</u>	<u>14.55</u>	<u>5.09</u>
<b>State Totals</b>	<b>\$12,538.52</b>	<b>\$2,337.65</b>	<b>120.47</b>	<b>\$738.56</b>	<b>\$385.66</b>

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**APPENDICES**

## Appendix A: Travel Economic Impact Model

### Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at U.S. Travel Association (formerly known as the U.S. Travel Data Center) to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of 16 travel categories. The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

The TEIM has the capability of estimating the economic impact of various types of travel, such as business and vacation, by transport mode and type of accommodations used, and other trip and traveler characteristics. The County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

### Definition of Terms

There is no commonly accepted definition of travel in use at this time. For the purposes of the estimates herein, *travel* is defined as activities associated with all overnight and day trips to places 50 miles away or more, one way, from the traveler's origin and any overnight trips away from home in paid accommodations.

The word *tourism* is avoided in this report because of its vague meaning. Some define tourism as all travel away from home while others use the dictionary definition that limits tourism to personal or pleasure travel.

The *travel industry*, as used herein, refers to the collection of 18 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Glossary of Terms). With the exception of Amtrak and second home ownership and rental, these business types are defined by the Office of Management and Budget in the 1997 North American Industry Classification System (NAICS) and well as in its predecessor, the 1987 Standard Industrial Classification System (SIC). In each case, the relevant NAICS and SIC codes are included.

Travel *expenditure* is assumed to take place whenever traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into 16 categories representing traveler purchases of goods and services at the retail level. One category, travel agents, receives no travel expenditures as these purchases are allocated to the category (i.e. air transportation) actually providing the final good or service to the traveler. Travel expenditures are allocated among states by simulating where the exchange of money for goods or service actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his/her destination, and some enroute.

*Economic impact* is represented by measures of spending, employment, payroll, business receipts and tax revenues generated by traveler spending. *Payroll* includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay and the value of

payments in kind paid during the year to all employees. Payroll is reported before deductions for social security, income tax insurance, union dues, etc. This definition follows that used by the U.S. Census Bureau in the quinquennial Census of Service Industries.

*Employment* represents the number of jobs generated by traveler spending, both full and part-time. As such, it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment. *Tax revenues* include corporate income, individual income, sales and gross receipts, and excise taxes by level of government. *Business receipts* reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

## **Description of the Model**

### *Estimates of Travel Expenditures*

Total travel expenditures includes spending by travelers on goods and services during their trips, such as lodging, transportation, meals, entertainment, retail shopping. Eighteen (18) categories of activities are covered in the TEIM. Generally, the TEIM combines the activity levels for trips to places within the United States with the appropriate average costs of each unit of travel activity, (e.g., cost per mile by mode of transport, cost per night by type of accommodation), to produce estimates of the total amount spent on each of 18 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in hotels in Vermont is multiplied by the average cost per night per travel party of staying in a hotel in the state to obtain the estimate of traveler expenditures for hotel accommodations.

The data on domestic travel activity levels (e.g., number of miles traveled by mode of transportation, the number of nights spent away from home by type of accommodation) are based on national travel surveys conducted by U.S. TRAVEL ASSOCIATION, The Bureau of Labor Statistics' Survey of Consumer Expenditures, Smith Travel Research's Hotel and Motel Survey, etc. Average cost data are purchased and collected from different organizations and government agencies. Total sales and revenue and other data collected from state, local and federal government and other organizations are employed to compare, adjust and update the spending database of TEIM, as well as linking spending to other impact components.

The international travel expenditure estimates are based on Tourism Industries' (OTTI) In-Flight Survey and data provided to OTTI from Canada and Mexico. Other estimates of the economic impact of international visitors to the U.S. are generated by TEIM by incorporating the estimated international traveler expenditures with the data series utilized to produce the domestic estimates.

### *Estimates of Business Receipts, Payroll and Employment*

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 16 travel categories are associated with a type of travel-related business. For example, traveler spending on commercial lodging in a state is related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701; NAICS 7211) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

It is assumed that each job in a specific type of business in a state is supported by some amount of business receipts and that each dollar of wages and salaries is similarly supported by some dollar volume of business receipts. The ratios of employment to business receipts are computed for each industry in each state. These ratios are then multiplied by the total amount of business receipts generated by traveler spending in a particular type of business to obtain the measures of travel generated employment and payroll of each type of business in each state. For example, the ratio of employees to business receipts in the state commercial lodging establishments is multiplied by travel generated business receipts of these establishments to obtain traveler generated employment in commercial lodging. A similar process is used for the payroll estimates.

The total sales, payroll and employment data of each travel related industry (by SIC and NAICS) are provided by and collected from state, local and federal government, such as the Bureau of Labor Statistics, the Bureau of Economic Analysis, Census Bureau and The Bureau of Transportation Statistics.

#### Estimates of Tax Revenues

The Fiscal Impact Component of the TEIM is used to estimate traveler generated tax revenues of federal, state and local governments. The yield of each type of tax is related to the best measure of the relevant tax base available for each state consistent with the output of the Economic Impact Component. The ratios of yield to base for each type of tax in each state are then applied to the appropriate primary level output to obtain estimates of tax receipts generated by travel. For example, the ratio of Massachusetts State personal income tax collections to payroll in the state is applied to total travel generated payroll to obtain the estimate of state personal income tax receipts attributable to traveler spending in Massachusetts.

#### Estimates for Counties and Local Areas

Local area travel impact estimates is derived by distributing the state estimates to the area using proper proportions of each related category in the area. The proportions of a local area are calculated based on a set of data collected from federal, state and local governments and private organizations. The data can be gathered at the zip code level.

Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and employment and payroll data, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, U.S. TRAVEL ASSOCIATION's travel surveys and other sources are used in building and updating the model. These data indicate the change in travel spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

#### **Limitations of the Study**

This study is designed to indicate the impact of U.S. traveler expenditures on employment, payroll, business receipts and tax revenue in each of the states. These impact estimates reflect the

limitations inherent in the definition of travel expenditures. Two important classes of travel-related expenses have not been estimated due to various reasons. Consumers purchase certain goods and services in anticipation of a trip away from home. These include sports equipment (tennis racquet, skis, scuba gear, etc.), travel books and guides, and services such as language lessons and lessons for participatory sports (tennis, skiing, underwater diving, etc.). The magnitude of these purchases in preparation for a trip cannot be quantified due to lack of sound, relevant data.

The second type of spending not covered due to lack of sufficient data is the purchase of major consumer durables generally related to outdoor recreation on trips. Further research is required in this area to determine to what extent pre-trip spending on consumer durable products can justifiably be included within a travel economic impact study.

## **Appendix B: Glossary of Terms – TEIM**

Automobile Transportation Expenditure. This category includes a prorated share of the fixed costs of owning an automobile, truck, camper, or other recreational vehicle, such as insurance, license fees, tax, and depreciation costs. Also included are the variable costs of operating an automobile, truck, camper, or other recreational vehicle on a trip, such as gasoline, oil, tires, and repairs. The costs of renting an automobile or other motor vehicle are included in this category as well.

Entertainment/Recreation Expenditure. Traveler spending on recreation facility user fees, admissions at amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Food Expenditure. Traveler spending in commercial eating facilities and grocery stores or carry-outs, as well as on food purchased for off-premise consumption.

Incidental Purchase Expenditure. Traveler spending on retail trade purchases including gifts for others, medicine, cosmetics, clothing, personal services, souvenirs, and other items of this nature.

Lodging Expenditure. Traveler spending on hotels and motels, B&Bs, campgrounds and trailer parks, rental of vacation homes and other types of lodging.

Public Transportation Expenditures. This includes traveler spending on air, bus, rail and boat/ship transportation, and taxicab or limousine service between airports and central cities.

Travel-generated Tax Receipts. Those federal, state and local tax revenues attributable to travel in an area. For a given state locality, all or some of the taxes may apply. "Local" includes county, city or municipality, and township units of government actually collecting the receipts and not the level that may end up receiving it through intergovernmental transfers.

Federal. These receipts include corporate income taxes, individual income taxes, employment taxes, gasoline excise taxes, and airline ticket taxes.

State. These receipts include corporate income taxes, individual income taxes, sales and gross receipts taxes, and excise taxes.

Local. These include county and city receipts from individual and corporate income taxes, sales, excise and gross receipts taxes, and property taxes.

## Appendix C: Travel-Related Industry Measurement

### SIC-NAICS Transition

As described in Appendix A, the 16 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, U.S. Travel Association selected these business types using 1987 U.S. Standard Industrial Classification (SIC) system codes.

The SIC system has been used for decades with tremendous success to classify all businesses in the U.S. by the types of products or services they make available. To its credit, the SIC system has facilitated the collection, tabulation and analysis of data. It has also promoted “apples-to-apples” comparability in statistical analyses. At the industry group level, SIC Codes report industry groups as 2 or 3 digit categories to 4 digits at their most specific.

However, as a direct consequence of rapid and widespread structural changes throughout the American economy in recent years, the SIC system has become largely outdated. Therefore, its business classification capabilities have become increasingly less than optimal.

In 1998, the United States Office of Management and Budget published a new industry classification system – the 1997 North American Industry Classification System (NAICS) to replace the SIC system. In contrast, the 2- to 6-digit NAICS industry classification system includes more useful and detailed economic data and provides a more comprehensive statistical representation of our industry. NAICS offers four major advantages over the SIC system:

**Relevance:** NAICS identifies hundreds of new, emerging, and advanced technology industries. Perhaps most important in terms of quantification of travel-related activity, NAICS reorganizes industries into more meaningful sectors, especially in the service-producing segments of the economy. A few examples of travel-related industries that are separately recognized for the first time:

- Convenience stores
- Gas stations with convenience stores
- Casino hotels
- Casinos
- Other gambling industries
- Bed and breakfast inns
- Limited service restaurants

**International Comparability:** NAICS was developed by the U.S. Office of Management and Budget (OMB) in cooperation with Statistics Canada and Mexico’s Instituto Nacional de Estadística, Geografía e Informática (INEGI). NAICS provides for comparable statistics among the three NAFTA trading partners.

**Consistency:** NAICS defines industries according to a consistent principle -- businesses that use similar processes are grouped together.

**Adaptability:** NAICS will be reviewed every five years, so classifications and information keep up with our changing economy.



### **TEIM: SIC/NAICS Industry Categories**

With the transition to NAICS, U.S. TRAVEL ASSOCIATION has adjusted its selections of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, U.S. Travel Association's Travel Economic Impact Model, tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of sixteen (16) business subcategories.

The industry groups and subcategories used in the model are outlined below, followed by a detailed table of SIC and NAICS Codes.

1. Automobile Transportation Industry: Gasoline service stations, motor vehicle/parts dealers and passenger car rental.
2. Entertainment/Recreation Industry: Entertainment, art and recreation industry.
3. Foodservice Industry: Eating & drinking places, and grocery stores.
4. General Retail Trade Industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops.

Incidental Purchases Industry: See above, General Retail Trade Industry.

5. Lodging Industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.
6. Public Transportation Industry: Air transportation, taxicab companies, interurban & rural bus transportation, railroad passenger transportation (Amtrak) and water passenger transportation. Also is the "dummy" industry of "other transportation."
7. Travel Arrangement Industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

**1987 SIC – 1997 NAICS:  
SELECTED TRAVEL-RELATED CATEGORIES**

SIC DESCRIPTION(S)	SIC CODE(S)	NAICS DESCRIPTION(S)	NAICS CODE(S)
<b>Accommodations</b>			
<i>Hotels and Motels</i>	701	<i>Traveler Accommodation</i>	7211
<i>Recreational Vehicle Parks &amp; Campsites</i>	703	<i>Recreational Vehicle Parks &amp; Campgrounds</i>	7212
<b>Auto Transportation</b>			
<i>Passenger Car Rental</i>	7514	<i>Passenger Car Rental</i>	532111
<i>Gasoline Service Stations</i>	554	<i>Gasoline Stations with Convenience Stores; Other Gasoline Stations</i>	447110; 447190
<i>Automotive Dealers</i>	55 (excl. 554)	<i>Motor Vehicle &amp; Parts Dealers</i>	4411; 4412; 4413
<b>Entertainment and Recreation</b>			
<i>Amusement and Recreational Services</i>	79	<i>Amusement, Gambling &amp; Recreation Industries</i>	713
		<i>Performing Arts, Spectator Sports &amp; Related Industries</i>	711
<i>Museums, Art Galleries, Botanical and Zoological Gardens</i>	84	<i>Museums, Historical Sites &amp; Similar Institutions</i>	712
<b>Food</b>			
<i>Eating &amp; Drinking Places (Alcoholic Beverages)</i>	581	<i>Foodservices &amp; Drinking Places</i>	7221; 7222; 7224
<i>Grocery Stores</i>	541	<i>Food and Beverage stores</i>	4451; 4452; 4453
<b>Public Transportation</b>			
<i>Air Transportation</i>	45	<i>Passenger Air Transportation; Airport Support Activities</i>	481; 4881
<i>Rail - Local &amp; Suburban Transit</i>	4111	<i>Rail Transportation</i>	485112
<i>Interurban &amp; Rural Bus Carriers</i>	413	<i>Interurban &amp; Rural Bus Transportation</i>	4852
<i>Charter Bus/Interstate</i>	4142	<i>Charter Bus (interstate/interurban)</i>	4855102
<i>Taxi &amp; Limousine Services</i>	412	<i>Taxi &amp; Limousine Services</i>	4853
<i>Water Transportation of Passengers</i>	448	<i>Water Passenger Transportation</i>	483112; 483114; 483212
--	--	<i>Scenic &amp; Sightseeing Transportation</i> <i>(New industry-includes parts of SICs 4119,4489,4522,4789,7999)</i>	487
<b>Retail</b>			
<i>General Merchandise Stores</i>	53	<i>General Merchandise Stores</i>	452
<i>Miscellaneous Retail Stores</i>	59	<i>Other Retail Stores</i>	453; 44611; 4483; 45111; 45112; 45121
<b>Travel Arrangement</b>			
<i>Travel Arrangement</i>	472	<i>Travel Arrangement &amp; Reservation Services</i> <i>(includes travel agencies and tour operators)</i>	5615

## **Appendix D: Sources of Data**

This appendix presents the sources of data used in this report.

### **Organizations**

Airlines for America (A4A), (formerly known as Air Transport Association of America - ATA)  
American Automobile Association  
Amtrak  
American Society of Travel Agents  
Bureau of Census, U.S. Department of Commerce  
Bureau of Economic Analysis, U.S. Department of Commerce  
Bureau of Labor Statistics, U.S. Department of Labor  
Bureau of Transportation Statistics, Department of Transportation  
Federal Aviation Administration, U.S. Department of Transportation  
Federal Highway Administration, U.S. Department of Transportation  
National Park Service  
South Carolina Department of Revenue  
South Carolina Department of Parks, Recreation & Tourism  
South Carolina Department of Transportation  
Smith Travel Research  
OTTI/International Trade Administration, U.S. Department of Commerce  
U.S. Travel Association