

ESTIMATED TOTAL IMPACT OF TOURISM ON

# Beaufort County

SOUTH CAROLINA 2024



**MARCH 2025**

CONDUCTED BY:

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## Introduction

This study estimates the economic impact generated by tourism to Beaufort County in the year 2024. It examines the impact of such tourism on the broader economy of Beaufort County, South Carolina, and takes into account the direct spending of the visitors along with the positive secondary effects of such expenditures. The analysis entailed estimating the economic impacts associated with various destinations within the county and then summing them together for an overall total. This report provides individual figures for Beaufort, Bluffton, and Hilton Head Island; figures for the unincorporated parts of the county are not reported separately, but are included in the county total.

This analysis was conducted by Dr. Daniel Guttentag and Melinda Patience of the Office of Tourism Analysis, which is part of the School of Business at the College of Charleston.

## Methodology

The economic impact estimations undertaken for this analysis involved various steps and diverse data. Initially, visitor volume estimates for each destination were produced using data on lodging demand, as provided by various third-party entities (e.g., Key Data), combined with visitor behavior data that is collected via a Visitor Profile Survey. The estimated total number of visitors in each destination for 2024 can be observed in Table 1. For the purposes of this analysis, overnight visitors who took a day trip to another one of the three destinations were counted both times. The visitor volume estimates were then used to estimate the total direct visitor spending associated with each destination. Such spending estimates also

relied upon visitor expenditure data collected as part of the previously mentioned Visitor Profile Survey, which asks respondents about their spending in over a dozen categories (e.g., lodging, food, transportation, and activities). The list of expenditure categories, and the total estimated direct expenditure in each category for 2024, can be observed in Table 2.

The previously described data were subsequently used to determine average per-person expenditures. These figures were combined with the estimated visitor counts and used as inputs for a regional economic impact modeling tool, IMPLAN. IMPLAN is an input-output (I-O) model that uses regionalized economic data and other information to determine economic output that accounts for direct expenditure and the secondary benefits of such expenditure (i.e., indirect and induced impacts). The model further estimates labor impacts and tax revenues.

The following metrics, as estimated by the economic impact model, are covered in this report:

- **Employment:** The number of jobs in the region supported by economic activity, which involves an industry-specific mix of full-time, part-time, and seasonal employment. Seasonal jobs are adjusted to annual equivalents.
- **Labor income:** All forms of employment income, including employee compensation (wages and benefits) and proprietor income.
- **Output:** The total value of industry production, which for the service sector represents total sales, for the retail sector represents gross margins, and for the manufacturing sector represents sales minus inventory change.

**Table 1. Number of Beaufort County Visitors**

Destination	Overnight	Day Trip	Total
Beaufort	211,780	192,871	<b>404,651</b>
Bluffton	173,167	310,606	<b>483,773</b>
Hilton Head Island	2,592,864	242,361	<b>2,835,225</b>
<b>Beaufort County</b>	<b>3,034,004</b>	<b>745,838</b>	<b>3,742,380</b>

**Table 2. 2024 Estimated Total Expenditure by Spending Category**

	Beaufort	Bluffton	Hilton Head	Beaufort County
Transportation	\$9,911,711	\$13,466,660	\$234,510,210	\$258,347,385
Lodging	\$18,838,273	\$20,538,088	\$1,020,793,976	\$1,061,042,335
Food - Dining	\$25,280,872	\$33,240,724	\$384,636,615	\$444,328,435
Food - Grocery	\$6,310,940	\$8,140,014	\$165,110,669	\$179,853,749
Shopping	\$26,210,157	\$35,187,147	\$310,062,092	\$372,672,637
Spas	\$3,294,663	\$5,491,259	\$60,325,531	\$69,263,962
Golf	\$2,012,973	\$3,233,902	\$74,930,879	\$80,270,933
Biking	\$1,510,321	\$2,166,248	\$27,785,235	\$31,531,715
Performance/Visual Arts	\$4,592,577	\$6,852,619	\$61,123,562	\$72,781,344
Festivals	\$1,992,031	\$3,336,652	\$33,395,923	\$38,816,816
Museums/Historical Tours	\$5,128,053	\$7,520,392	\$41,656,633	\$54,542,450
Boating/Sailing/Fishing	\$5,552,062	\$6,986,322	\$113,480,607	\$126,275,990
Nature-based Activities	\$1,192,693	\$1,767,994	\$64,785,638	\$67,801,534
Dolphin Tours	\$2,411,111	\$3,054,782	\$59,439,696	\$65,017,197
Tennis	\$834,610	\$1,325,637	\$45,526,046	\$47,724,926
Other Expenses	\$6,026,767	\$8,800,901	\$150,526,849	\$165,633,490
<b>Total Expenditure</b>	<b>\$121,099,814</b>	<b>\$161,109,342</b>	<b>\$2,848,090,163</b>	<b>\$3,135,904,899</b>

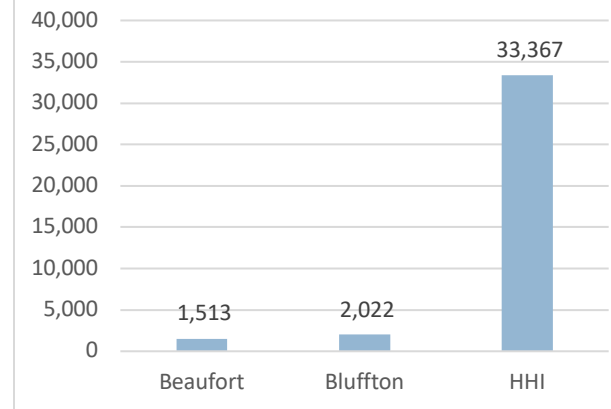
- **Direct:** The initial effects to local industries that are directly receiving the expenditures of interest.
- **Indirect:** The secondary effects resulting from business-to-business purchases in the supply chain occurring throughout the region, as triggered by or in support of the direct expenditure activity.
- **Induced:** The ripple effects in the region resulting from household spending of income, after the removal of taxes, savings, and commuters.
- **Taxes:** These revenues take into account a variety of taxes, including sales tax, property tax, and income tax. These figures do not account for tourism taxes, such as accommodation taxes.

## Results

Visitation numbers to Beaufort County in 2024 declined slightly from the prior year. This pattern is consistent with macro-level trends amongst Southeastern coastal vacation destinations, which have seen demand soften since the post-pandemic boom when visitors flocked to such locales. Nonetheless, it is important to note that Beaufort County visitor volume in 2024 continued to significantly surpass the pre-pandemic 2019 baseline. Moreover, expenditure levels remained robust in 2024, such that the total economic impact of tourism on the Beaufort County economy is greater than it was in 2023.

An estimated total of **3.74 million visitors** came to Beaufort County in 2024, down 5.0% compared to 2023. The overall economic impact of this tourism on Beaufort County was **\$4.09 billion**, up 2.7% compared to 2023. This economic impact represents not just the direct expenditure by visitors, but also the secondary ripple effects of such economic activity that occur as tourism businesses spend operating funds and as tourism dollars are re-spent within the region. Beaufort County tourism also supported an estimated **36,902 jobs**, which represent 40.2% of all jobs in Beaufort County, as per employment data provided by the Bureau of Labor Statistics. Similar to the economic impact figure, this employment figure does not refer solely to jobs within the tourism sector, but rather to a combination of full-time, part-time, and seasonal jobs that are both directly and indirectly supported by the broader tourism economy and its secondary effects on non-tourism industries and enterprises. Impact estimates for each of the destinations are presented in the Appendix (Tables A1 - A4), and the employment impacts are presented in Figure 1.

Figure 1. Estimated Employment Impact by Destination

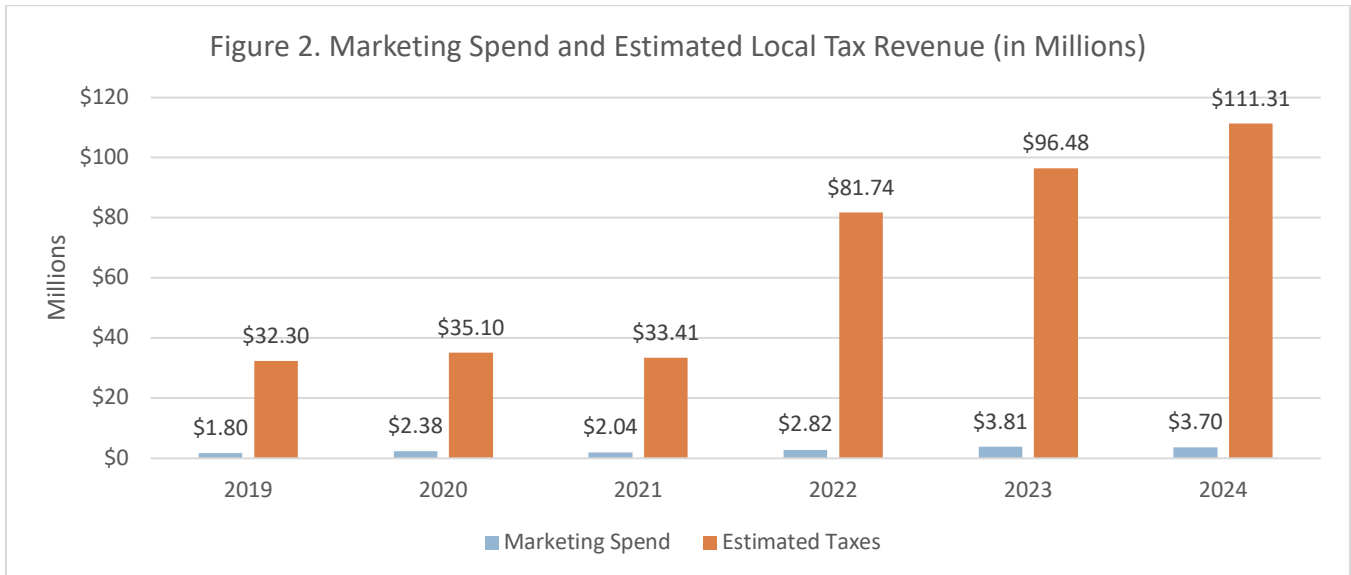


A total output multiplier for tourist spending was calculated using the model estimates. This multiplier represents the ratio of total economic impact to direct spending. The estimated output multiplier for tourism on Beaufort County was **1.30**. This signifies that every dollar spent by tourists in Beaufort County increased output in the overall Beaufort County economy by a total of \$1.30.

The tourist expenditures generated an estimated **\$55.02 million** in tax revenues for local Beaufort County governments. As reported by their local governments, Hilton Head Island earned an additional **\$44.70 million** in accommodations tax, hospitality tax, and beach preservation fees; Bluffton earned an additional **\$6.31 million** in accommodations tax and hospitality tax; and Beaufort earned an additional **\$5.28 million** in accommodations tax and hospitality tax. Together, this **\$111.31 million** in tax revenue represents an increase of \$13.26 million (13.5%) over 2023. This tax revenue also corresponds with a Return on Tax Investment (ROTI) of 30.10, based on the \$3.70 million that was spent on destination marketing in 2024. In other words, each dollar spent by the Visitor & Convention Bureau yielded an estimated return of **\$30.10** in local tax revenue. The comparative relationship over the past five

years between destination marketing expenditure and the estimated local tax

revenues generated from tourism can be seen in Figure 2.





## Appendix

**Table A1. Beaufort – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	1,107	\$32,954,191	\$98,444,356
<b>Indirect</b>	222	\$10,518,682	\$36,206,604
<b>Induced</b>	116	\$5,617,614	\$19,587,992
<b>Total</b>	<b>1,446</b>	<b>\$49,090,487</b>	<b>\$154,238,951</b>
<b>Estimated Local Tax Revenue</b>			\$1,759,336
<b>Local Tourism Tax Revenue (ATax and HTax)</b>			\$5,281,945
<b>Total Estimated Local Tax Revenue</b>			<b>\$7,041,281</b>

**Table A2. Bluffton – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	1,569	\$46,466,857	\$130,221,102
<b>Indirect</b>	291	\$13,805,620	\$48,291,056
<b>Induced</b>	162	\$7,820,102	\$27,268,718
<b>Total</b>	<b>2,022</b>	<b>\$68,092,579</b>	<b>\$205,780,876</b>
<b>Estimated Local Tax Revenue</b>			\$2,235,114
<b>Local Tourism Tax Revenue (ATax and HTax)</b>			\$6,307,369
<b>Total Estimated Local Tax Revenue</b>			<b>\$8,542,482</b>

**Table A3. Hilton Head Island – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	25,328	\$813,961,501	\$2,436,445,769
<b>Indirect</b>	5,181	\$242,405,902	\$816,736,973
<b>Induced</b>	2,858	\$135,619,393	\$471,160,277
<b>Total</b>	<b>33,367</b>	<b>\$1,191,986,796</b>	<b>\$3,724,343,019</b>
<b>Estimated Local Tax Revenue</b>			\$50,946,081
<b>Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)</b>			\$44,697,517
<b>Total Estimated Local Tax Revenue</b>			<b>\$95,643,598</b>

**Table A4. Beaufort County, All Destinations – Estimated Economic Impact on Beaufort County**

	Employment	Labor Income	Output
<b>Direct</b>	28,056	894,907,963	2,669,668,109
<b>Indirect</b>	5,705	\$267,217,103	\$902,910,599
<b>Induced</b>	3,141	\$149,317,142	\$518,923,694
<b>Total</b>	<b>36,902</b>	<b>\$1,311,442,208</b>	<b>\$4,091,502,402</b>
<b>Estimated Local Tax Revenue</b>			\$55,021,969
<b>Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)</b>			\$56,286,831
<b>Total Estimated Local Tax Revenue</b>			<b>\$111,308,799</b>



**Table A5. Top 50 Industries Impacted by Beaufort County Tourism**

	Industry	Output
1	Non-hotel accommodations	\$874,370,879
2	Full-service restaurants	\$482,237,080
3	Transit and ground passenger transportation	\$265,128,957
4	Hotels and motels, including casino hotels	\$215,190,807
5	Retail - Miscellaneous store retailers	\$207,018,774
6	Other real estate	\$201,783,112
7	Fitness and recreational sports centers	\$163,325,232
8	Water transportation	\$126,078,295
9	Museums, historical sites, zoos, and parks	\$124,579,837
10	Owner-occupied housing	\$104,466,409
11	Insurance agencies, brokerages, and related activities	\$90,550,846
12	Performing arts companies	\$76,641,100
13	Truck transportation	\$76,342,125
14	Scenic and sightseeing transportation and support activities for transportation	\$76,177,704
15	Retail - Food and beverage stores	\$66,605,343
16	Other amusement and recreation industries	\$42,414,707
17	All other food and drinking places	\$40,016,421
18	Monetary authorities and depository credit intermediation	\$37,318,581
19	Management of companies and enterprises	\$35,904,040
20	Other local government enterprises	\$35,603,611
21	Legal services	\$29,953,865
22	Maintenance and repair construction of nonresidential structures	\$29,728,589
23	Employment services	\$28,208,975
24	Services to buildings	\$26,024,394
25	Limited-service restaurants	\$23,940,719
26	Management consulting services	\$23,031,967
27	Travel arrangement and reservation services	\$22,313,782
28	Securities and commodity contracts intermediation and brokerage	\$21,941,007
29	Advertising, public relations, and related services	\$21,722,052
30	Offices of physicians	\$20,726,360
31	Other financial investment activities	\$20,361,399
32	Nondepository credit intermediation and related activities	\$19,459,122
33	Accounting, tax preparation, bookkeeping, and payroll services	\$19,060,848
34	Landscape and horticultural services	\$17,979,820
35	Postal service	\$16,884,907
36	Lessors of nonfinancial intangible assets	\$16,632,407
37	Data processing, hosting, and related services	\$15,726,600
38	Couriers and messengers	\$13,760,585
39	Automotive repair and maintenance, except car washes	\$13,425,504

	Industry	Output
40	Retail - Motor vehicle and parts dealers	\$13,033,821
41	Commercial and industrial machinery and equipment rental and leasing	\$12,808,850
42	Independent artists, writers, and performers	\$12,233,914
43	Retail - General merchandise stores	\$11,600,780
44	Insurance carriers, except direct life	\$11,367,139
45	Wholesale - Other nondurable goods merchant wholesalers	\$11,220,072
46	Internet publishing and broadcasting and web search portals	\$10,727,091
47	Waste management and remediation services	\$9,856,455
48	Retail - Building material and garden equipment and supplies stores	\$9,699,290
49	Personal and household goods repair and maintenance	\$9,615,509
50	Tenant-occupied housing	\$9,578,296