

ESTIMATED TOTAL IMPACT OF TOURISM ON

Beaufort County

SOUTH CAROLINA 2025



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CONDUCTED BY:

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Introduction

This study estimates the economic impact generated by tourism to Beaufort County in the year 2025. 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 2025 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 2025, 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	200,473	182,574	383,047
Bluffton	171,649	307,883	479,532
Hilton Head Island	2,440,207	228,346	2,668,553
Beaufort County	2,821,609	727,254	3,548,863

Table 2. 2025 Estimated Total Expenditure by Spending Category

	Beaufort	Bluffton	Hilton Head	Beaufort County
Transportation	\$12,374,824	\$18,357,005	\$209,991,116	\$241,295,774
Lodging	\$28,669,098	\$32,729,408	\$1,003,246,352	\$1,065,971,965
Food - Dining	\$26,765,206	\$37,244,164	\$414,879,675	\$480,128,005
Food - Grocery	\$5,225,457	\$7,376,530	\$166,713,061	\$179,556,934
Shopping	\$22,710,966	\$34,235,415	\$267,845,799	\$325,843,464
Spas	\$718,762	\$1,162,203	\$85,381,926	\$87,296,162
Golf	\$1,500,536	\$3,120,633	\$153,558,010	\$158,248,637
Biking	\$377,484	\$612,155	\$52,784,745	\$53,791,857
Performance/Visual Arts	\$1,996,771	\$3,509,492	\$70,256,360	\$75,855,052
Festivals	\$599,981	\$1,089,274	\$46,386,053	\$48,103,080
Museums/Historical Tours	\$2,555,713	\$3,597,663	\$64,694,203	\$70,965,883
Boating/Sailing/Fishing	\$6,547,359	\$8,294,867	\$127,660,591	\$142,805,896
Nature-based Activities	\$962,712	\$1,586,858	\$48,709,382	\$51,303,515
Dolphin Tours	\$492,657	\$941,831	\$56,343,640	\$57,800,932
Tennis	\$449,718	\$892,811	\$43,427,850	\$44,791,196
Other Expenses	\$8,430,471	\$11,635,274	\$84,576,647	\$105,032,638
Total Expenditure	\$120,377,714	\$166,385,583	\$2,896,455,409	\$3,188,790,989

- **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

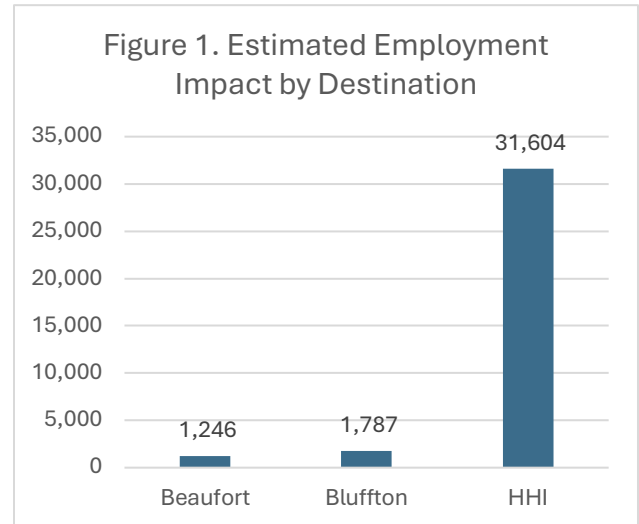
Visitation numbers to Beaufort County in 2025 were slightly below the previous year. This pattern mirrors the experience of many Southeastern coastal destinations, which have seen demand gradually decline after a

dramatic rise following the pandemic, when people sought out domestic destinations offering outdoor recreation opportunities. In addition, economic uncertainties and a decline in international visitation dampened travel demand throughout 2025 across much of the country. Nevertheless, Beaufort County visitor volume for 2025 surpassed the pre-pandemic high that was reached in 2019. Furthermore, visitor expenditure levels increased in 2025, such that the total economic impact of tourism on the Beaufort County economy is greater than it was in 2024.

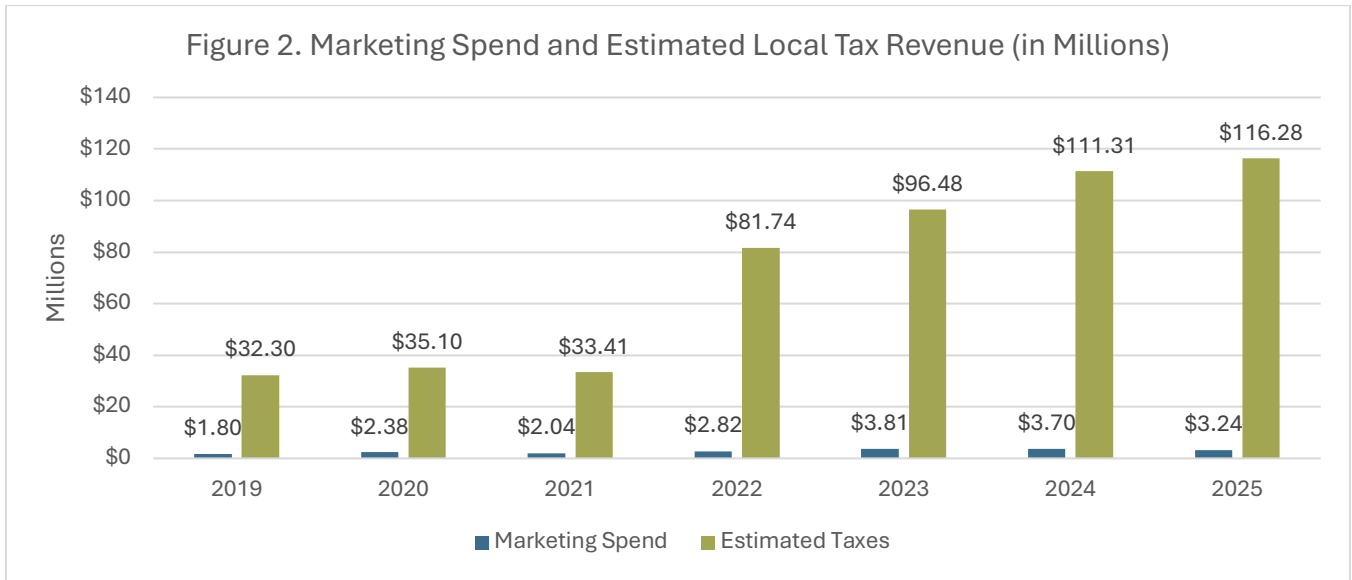
An estimated total of **3.55 million visitors** came to Beaufort County in 2025, down 5.2% compared to 2024. The overall economic impact of this tourism on Beaufort County was **\$4.32 billion**, up 5.5% compared to 2024. This economic impact represents not just the direct expenditure by visitors, but 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 **34,696 jobs**, which represent 37.9% 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.

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 **1.38**. This signifies that every dollar spent by tourists in Beaufort County increased output in the overall Beaufort County economy by a total of \$1.38.



The tourist expenditures generated an estimated **\$54.06 million** in tax revenues for local Beaufort County governments. As reported by their local governments, Hilton Head Island earned an additional **\$49.84 million** in accommodations tax, hospitality tax, and beach preservation fees; Bluffton earned an additional **\$7.22 million** in accommodations tax and hospitality tax; and Beaufort earned an additional **\$5.25 million** in accommodations tax and hospitality tax. Together, this **\$116.37 million** in tax revenue represents an increase of \$5.06 million (4.5%) over 2024. This tax revenue also corresponds with a Return on Tax Investment (ROTI) of 35.89, based on the \$3.24 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 **\$35.89** 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
Direct	954	\$27,452,621	\$97,711,540
Indirect	193	\$10,105,546	\$34,405,661
Induced	100	\$5,057,982	\$17,981,163
Total	1,246	\$42,616,149	\$150,098,363
Estimated Local Tax Revenue			\$1,902,697
Local Tourism Tax Revenue (ATax and HTax)			\$5,246,717
Total Estimated Local Tax Revenue			\$7,149,415

Table A2. Bluffton – Estimated Economic Impact on Beaufort County

	Employment	Labor Income	Output
Direct	1,376	\$38,743,601	\$132,839,817
Indirect	271	\$14,065,850	\$48,418,542
Induced	140	\$7,125,491	\$25,331,550
Total	1,787	\$59,934,942	\$206,589,909
Estimated Local Tax Revenue			\$2,495,430
Local Tourism Tax Revenue (ATax and HTax)			\$7,221,181
Total Estimated Local Tax Revenue			\$9,716,611

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

	Employment	Labor Income	Output
Direct	23,729	\$765,532,870	\$2,569,166,457
Indirect	5,155	\$261,863,984	\$893,571,702
Induced	2,721	\$138,226,603	\$491,393,282
Total	31,604	\$1,165,623,457	\$3,954,131,441
Estimated Local Tax Revenue			\$49,576,954
Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)			\$49,837,512
Total Estimated Local Tax Revenue			\$99,414,466

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

	Employment	Labor Income	Output
Direct	26,103	832,999,871	2,804,240,885
Indirect	5,627	\$286,503,166	\$977,988,539
Induced	2,965	\$150,644,210	\$535,538,341
Total	34,696	\$1,270,147,246	\$4,317,767,766
Estimated Local Tax Revenue			\$54,063,157
Local Tourism Tax Revenue (ATax, HTax, and Beach Preservation Fees)			\$62,305,410
Total Estimated Local Tax Revenue			\$116,368,567

Table A5. Top 50 Industries Impacted by Beaufort County Tourism

	Industry	Output
1	Other accommodations	\$822,971,066
2	Full-service restaurants	\$512,107,784
3	Fitness and recreational sports centers	\$258,841,558
4	Other real estate	\$253,420,368
5	Hotels and motels, including casino hotels	\$244,972,481
6	Transit and ground passenger transportation	\$243,664,998
7	Miscellaneous store retailers	\$180,890,096
8	Water transportation	\$142,495,202
9	Museums, historical sites, zoos, and parks	\$122,438,367
10	Owner-occupied housing	\$109,520,769
11	Truck transportation	\$98,721,052
12	Insurance agencies, brokerages, and related activities	\$90,316,096
13	Performing arts companies	\$79,080,921
14	Scenic and sightseeing transportation and support activities for transportation	\$70,614,620
15	Food and beverage stores	\$66,730,619
16	Other amusement and recreation industries	\$51,472,273
17	All other food and drinking places	\$40,584,231
18	Monetary authorities and depository credit intermediation	\$39,321,857
19	Other local government enterprises	\$33,564,638
20	Legal services	\$30,950,156
21	Maintenance and repair construction of nonresidential structures	\$28,996,416
22	Services to buildings	\$27,609,256
23	Employment services	\$26,984,151
24	Securities and commodity contracts intermediation and brokerage	\$25,387,929
25	Limited-service restaurants	\$23,818,536
26	Travel arrangement and reservation services	\$22,756,077
27	Management consulting services	\$21,752,605
28	Offices of physicians	\$21,669,841
29	Advertising, public relations, and related services	\$20,180,050
30	Landscape and horticultural services	\$19,769,405
31	Postal service	\$19,671,204
32	Management of companies and enterprises	\$18,846,319
33	Nondepository credit intermediation and related activities	\$18,525,396
34	Lessors of nonfinancial intangible assets	\$17,835,637
35	Accounting, tax preparation, bookkeeping, and payroll services	\$16,910,136
36	Other financial investment activities	\$16,893,979
37	Data processing, hosting, and related services	\$16,121,333
38	Automotive repair and maintenance, except car washes	\$14,447,111
39	Motor vehicle and parts dealers	\$13,752,386
40	Commercial and industrial machinery and equipment rental and leasing	\$13,259,247
41	Insurance carriers, except direct life	\$13,148,196

Industry		Output
42	General merchandise stores	\$12,544,474
43	Couriers and messengers	\$12,208,988
44	Internet publishing and broadcasting and web search portals	\$12,080,768
45	Wholesale - Other nondurable goods merchant wholesalers	\$12,019,602
46	Tenant-occupied housing	\$11,800,345
47	Personal and household goods repair and maintenance	\$11,137,189
48	Waste management and remediation services	\$10,182,377
49	Gasoline stores	\$10,166,374
50	Hospitals	\$9,894,411