

**The Economic Impact  
of Travel on  
South Carolina Counties  
2018**

A Study Prepared for the  
**South Carolina Department of Parks, Recreation & Tourism**  
by the  
U.S. Travel Association  
Washington, D.C.  
August 2019



## **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 2018 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 2017 impact estimates are also included in this report.

U.S. Travel Association  
Washington, D.C.  
August 2019

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## **INTRODUCTION**

This report presents preliminary 2018 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, 2017 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 2018 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 \$14.4 billion in South Carolina during 2018, up 5.2 percent from 2017, not adjusted for inflation.
- Domestic travel-supported employees in South Carolina earned nearly \$2.7 billion in payroll income during 2018. This represented a 3.9 percent increase from 2017.
- Domestic traveler expenditures directly supported 130,600 jobs within South Carolina in 2018, a 2.8 percent increase from 2017. These jobs supported by domestic traveler spending in South Carolina composed 6.1 percent of the total state non-agricultural employment in 2018.
- In 2018, every \$110,539 spent by domestic travelers in South Carolina supported one job.
- Domestic traveler spending in South Carolina directly generated \$2.1 billion in tax revenue for federal, state and local governments in 2018, up 4.2 percent from 2017.
- Horry County received over \$4.5 billion in domestic travel expenditures to lead all of South Carolina's 46 counties. Charleston County ranked second with close to \$2.6 billion, followed by Beaufort County with \$1.4 billion.
- Seventeen of South Carolina's 46 counties received over \$100 million in domestic travel expenditures in 2018.
- Fifteen counties in South Carolina indicated one thousand or more jobs were directly supported by domestic travelers during 2018.



## **NATIONAL SUMMARY 2018**

The U.S. economy came alive in 2018, the ninth year of economic expansion since the Great Recession of 2007-2009. Real GDP increased at 2.9 percent, the fastest annual growth rate in an economic expansion marked by annual economic growth between one and two percent. On top of robust consumer spending and solid business investment, the economy in 2018 also relied on a labor market performing at historic levels, with nonfarm payrolls at all-time highs and the unemployment rate near the lowest mark in 50 years. However, trade tensions, firming inflation, and sluggish real (inflation-adjusted) wage growth remain headwinds for the economy moving forward.

Consumer spending, which accounts for over two-thirds of the U.S. economy, headlined 2018 economic growth, contributing to nearly two-thirds (1.8 percentage points) of the 2.9 percent real GDP growth rate. As usual, over half of this new spending was toward services (which includes the travel industry). Business investment, inspired by renewed business confidence, contributed over one percentage point to 2018 economic growth, the largest contribution in business investment since 2012. U.S. businesses also contributed to a 4% growth in exports in 2018, growth that was cancelled out by a 4.5 percent increase in imports. Exports had an uncommonly volatile year, with fears of increased tariffs between the U.S. and China, our largest trading partner, leading to large seasonal fluctuations in international trade volumes.

The labor market continued to outperform expectations in 2018, with the national job count of nonfarm payrolls eclipsing 150 million by mid-year. While employment increased by 2.5 million, unemployment fell by nearly 670,000 jobs, bringing the 2018 annual unemployment rate to 3.9 percent, the lowest annual average unemployment rate since 1969. Travel has made a great contribution to the labor market. In 2018, travel generated 8.9 million jobs for the tourism industry. Without the 8.9 million jobs generated by the travel and tourism, that unemployment rate would have been 5.5 percentage points greater (9.4%).

Wages also increased in 2018. Average hourly wages for non-supervisory employees increased by just under 3 percent in 2018, the fastest annual growth since 2010. The 3% increase in wages meant that wages outpaced inflation in consumer prices in 2018.

Consumer Price Index (CPI) and Travel Price Index (TPI) experienced 2.4 percent and 2.5 percent annual average increases, respectively. Core CPI, which excludes food and energy items, remained relatively stable with a 2.1 percent increase in 2018.

**Table 1: Overall U.S. Economic Indicators, 2016-2018**

<u>Sector</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
Nominal gross domestic product (\$Billions)	18,715.0	19,519.4	20,580.2
Real gross domestic product (\$Billions) *	17,688.9	18,108.1	18,638.2
Real disposable personal income (\$Billions) *	13,608.4	14,002.8	14,556.2
Real personal consumption expenditures (\$Billions) *	12,247.5	12,566.9	12,944.6
Consumer price index**	240.0	245.1	251.1
Travel Price Index**	273.1	279.4	286.5
Non-farm payroll employment (Millions)	144.4	146.6	149.1
Unemployment rate (%)	4.9	4.4	3.9
<b>Percentage change from previous year</b>			
Nominal gross domestic product	2.7%	4.0%	5.4%
Real gross domestic product	1.6%	2.4%	2.9%
Real disposable personal income	1.8%	2.9%	4.0%
Real personal consumption expenditures	2.7%	2.6%	3.0%
Consumer price index	1.3%	2.1%	2.4%
Travel Price Index	0.3%	2.3%	2.5%
Non-farm payroll employment	1.8%	1.6%	1.7%

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

\* In chained 2012 dollars

\*\* 1982-84=100

## U.S. Travel Volume in 2018

U.S. domestic travel, including leisure and business travel, increased 1.9 percent to a total of 2.3 billion person-trips in 2018. 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 entertainment and recreation purposes, increased 2.0 percent in 2018 to over 1.8 billion person-trips, even with the growth rate achieved in 2017. U.S. leisure travel accounted for 80 percent of all U.S. domestic travel in 2018. Leisure person-trips are expected to increase by 1.8 percent in 2019, according to the U.S. Travel Association.

Domestic business person-trips increased 1.6 percent to 464 million in 2018. Business travel is expected to continue its recovery from the 2016 contraction, increasing 1.5 percent in 2019.

International arrivals to the U.S. increased 3.5 percent to 79.6 million in 2018. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 39.9 million in 2018 and accounted for 50.6 percent of all international arrivals to the United States. Canadian arrivals

to the U.S increased by 4.9 percent in 2018 and reached 21.2 million. Mexican arrivals increased by 3.9 percent to 18.5 million in 2018.

### Travel Expenditures in 2018

Domestic and international travelers spent nearly \$1.1 trillion in the U.S. in 2018, increased 4.9 percent (not inflation adjusted) from 2017, the fastest annual growth rate in travel spending since 2014. Travel spending is expected to grow in the next four years. U.S. Travel Association expects travel spending will increase by 2.7 percent in 2019.

Domestic travel spending in 2018 increased by 5.8 percent to nearly \$933 billion while international travel spending did not rebound as expected in 2018, remaining virtually flat at \$156 billion. Domestic and International traveler expenditures are expected to grow 2.9 percent and 1.7 percent in 2019, respectively.

International traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenditures on long-term education, health care, and spending by cross border day-trip visitors and seasonal workers. In 2018, international airfare receipts totaled \$41 billion, increasing 1 percent from 2017. Only \$10.3 billion in international airfare receipts were collected in the first quarter of 2019, a decrease of 0.6 percent against the first quarter of 2018.

Accounting for 70 percent of all travel spending, leisure traveler spending totaled \$762 billion in 2018, 6.1 percent increase from 2017. Business traveler spending increased by 2.4 percent to \$319 billion in 2018, accounting for 30 percent of all traveler expenditures.

Category	2017 Spending (\$ Billions)			2018 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$175.1	\$16.4	\$191.6	\$183.6	\$16.8	\$200.4
Auto Transportation	148.9	1.9	150.9	164.6	2.0	166.5
Lodging	172.8	48.9	221.7	182.7	49.4	232.2
Foodservice	224.8	32.8	257.6	234.8	32.9	267.7
Entertainment & Recreation	95.1	13.5	108.6	99.1	13.5	112.6
General Retail Trade	65.1	42.3	107.3	68.0	41.6	109.6
<b>Total</b>	<b>\$881.9</b>	<b>\$155.8</b>	<b>\$1,037.7</b>	<b>\$932.7</b>	<b>\$156.3</b>	<b>\$1,089.0</b>

Source: U.S. Travel Association

\* Excludes international passenger fare payments.

## **Travel Employment in 2018**

The 2018 labor market continued to expand at a healthy rate. At average over 2018, 149.1 million people were employed on nonfarm payrolls, 1.7% increase from 2017. In addition to creating 2.5 million jobs in 2018, the unemployment rate dropped from 4.4 percent in 2017 to 3.9 percent in 2018, the lowest annual average unemployment rate since 1969. Additionally, the fall in unemployment was progressive and consistent across 2018: the unemployment rate started the year at 4.1 percent and reached as low as 3.7 percent in November 2018 before ending the year at 3.9 percent.

The unemployment rate continues to fall. In both April and May 2019, the monthly unemployment stayed at a 49-year low of 3.6 percent. Moreover, other measures of labor market health continue. During the first five months of 2019, real disposable personal income increased 2.3 percent compared to the first five months of 2018.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery in the current economic expansion period. The 15.8 million service jobs gained from 2010 to 2018 represent 84 percent of the total new jobs over that eight-year period. The travel industry joined health care; administrative services; accommodation and foodservices; and retail trade as one of the leading growth industries in terms of overall jobs created from 2010 to 2018.

In 2018, traveler spending directly supported over 8.9 million U.S. jobs, including both full-time and seasonal/part-time positions, up 1.3 percent from 2017, accounted for 6 percent of total non-farm employment in the U.S. These 8.9 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2018 national unemployment rate of 3.9 percent would have more-than-doubled to 9.4 percent.

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

Category	2017 Employment (Thousands)			2018 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	977.2	76.2	1,053.5	991.5	76.9	1,068.3
Auto Transportation	304.0	2.4	306.4	306.9	2.3	309.2
Lodging	1,349.8	276.0	1,625.8	1,373.8	273.4	1,647.2
Foodservice	3,138.2	445.2	3,583.4	3,183.7	441.2	3,624.9
Entertainment & Recreation	1,275.0	239.2	1,514.2	1,313.4	240.2	1,553.6
General Retail Trade	381.2	165.0	546.2	382.5	159.2	541.7
Travel Planning	182.8		182.8	183.3		183.3
<b>Total</b>	<b>7,608.2</b>	<b>1,204.0</b>	<b>8,812.2</b>	<b>7,735.0</b>	<b>1,193.3</b>	<b>8,928.3</b>

Source: U.S. Travel Association

\* Excludes jobs supported by international passenger fare payments.

U.S. Travel Forecast

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

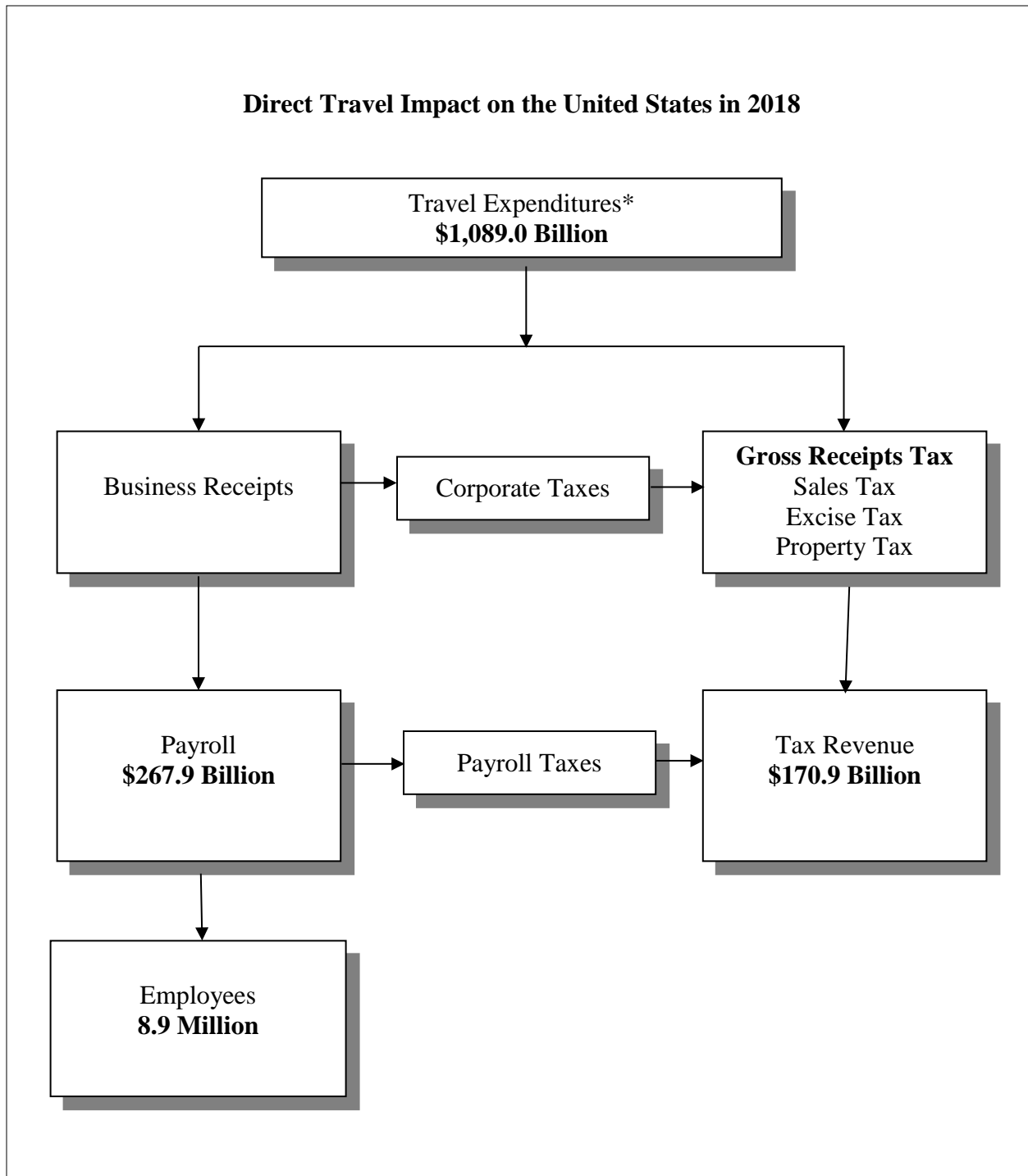
	2016	2017	2018	2019	2020	2021	2022
GDP (\$ Billions of current dollars)	18,715.0	19,519.4	20,580.2	21,446.4	22,208.3	23,051.4	23,956.8
Unemployment Rate (%)	4.9	4.4	3.9	3.6	3.5	3.7	3.8
Consumer Price Index (CPI)*	240.0	245.1	251.1	256.3	261.1	265.9	271.2
Travel Price Index (TPI)*	273.1	279.4	286.5	289.0	293.2	298.5	303.8
Total Travel Expenditures in U.S. (\$ Billions)	994.1	1,037.7	1,089.0	1,118.7	1,160.6	1,209.4	1,257.7
U.S. Residents	838.5	881.9	932.7	959.7	996.3	1,038.3	1,079.6
International Visitors**	155.6	155.8	156.3	159.0	164.4	171.1	178.1
Total International Visitors to the U.S. (Millions)	76.4	76.9	79.6	79.8	82.2	84.9	87.8
Canada	19.3	20.2	21.2	21.0	21.5	22.1	22.8
Mexico	19.0	17.8	18.5	18.2	18.7	19.3	20.0
Overseas Arrivals to the U.S. (Millions)	38.1	38.9	39.9	40.6	42.0	43.5	45.0
Total Domestic Person-Trips (Millions)	2,206.6	2,247.9	2,291.1	2,330.8	2,369.2	2,411.2	2,457.5
Business	454.7	456.3	463.6	470.4	477.0	484.9	493.7
Leisure	1,751.9	1,791.5	1,827.5	1,860.5	1,892.2	1,926.3	1,963.8
<b>Percent Change from Previous Year (%)</b>							
Nominal GDP	1.6	2.4	2.9	2.4	1.6	1.8	1.9
Consumer Price Index (CPI)	1.3	2.1	2.4	2.1	1.9	1.8	2.0
Travel Price Index (TPI)	0.3	2.3	2.5	0.9	1.4	1.8	1.7
Total Travel Expenditures in U.S.	2.0	4.4	4.9	2.7	3.7	4.2	4.0
U.S. Residents	2.9	5.2	5.8	2.9	3.8	4.2	4.0
International Visitors	-2.7	0.1	0.3	1.7	3.4	4.1	4.1
Total International Visitors to the U.S.	-1.8	0.7	3.5	0.2	3.0	3.2	3.5
Canada	-6.8	4.8	4.9	-1.0	2.3	2.9	3.3
Mexico	3.4	-6.1	3.9	-1.9	3.0	3.3	3.5
Overseas Arrivals to the U.S.	-1.5	2.0	2.5	1.9	3.4	3.4	3.5
Total Domestic Person-Trips	1.3	1.9	1.9	1.7	1.6	1.8	1.9
Business	-1.1	0.4	1.6	1.5	1.4	1.6	1.8
Leisure	1.9	2.3	2.0	1.8	1.7	1.8	1.9

Source: U.S. Travel Association's Travel Forecast Model, BLS, Department of Labor; OTTI, BEA, Department of Commerce, Tourism Economics.

\* 1982-84=100

\*\* Excludes international traveler spending on medical, educational and cross-border/seasonal work-related activities or international passenger fares on U.S.

\*\*\* One person trip of 50 miles or more, one way, away from home or including one or more nights away from home.



Source: U.S. Travel Association, BEA

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

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**DOMESTIC TRAVEL IMPACT  
ON SOUTH CAROLINA**

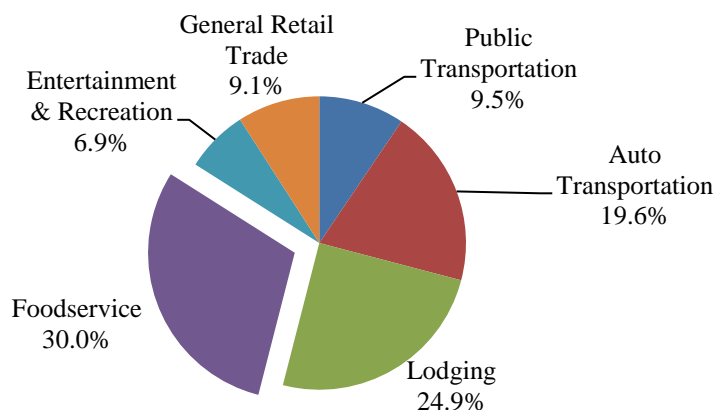
## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2018

### Travel Expenditures

During 2018, domestic travelers to South Carolina spent more than \$14.4 billion on transportation, lodging, food, entertainment and recreation and incidentals, up 5.2 percent from 2017 before any inflation adjustment.

- The foodservice industry received the largest amount of traveler expenditure, registering \$4.3 billion in 2018, up 3.4 percent from 2017. This accounted for 30.0 percent of the state total domestic travel spending.
- The lodging industry, which reached nearly \$3.6 billion in 2018 domestic traveler expenditure receipts, is in second position. These expenditures increased 4.9 percent from 2017. Smith Travel Research’s data show that total rooms sold in South Carolina increased 1.4 percent and average room rate in the state was up 2.0 percent in 2018.
- Domestic traveler spending on auto transportation totaled \$2.8 billion in 2018, an increase of 8.3 percent, largely due to gasoline price increases.
- Domestic travelers spent nearly \$1.4 billion on public transportation in South Carolina during 2018, up 7.7 percent compared with 2017.

**Domestic Travel Expenditures in South Carolina  
by Industry Sector - 2018**



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, 2017-2018**

<i>2018 Travel Expenditures</i>	<b>Total</b> (\$ Millions)	<b>% of Total</b> (Percent)
Public Transportation	\$1,366.4	9.5%
Auto Transportation	2,833.5	19.6%
Lodging	3,596.2	24.9%
Foodservice	4,330.5	30.0%
Entertainment & Recreation	999.9	6.9%
General Retail Trade	1,311.8	9.1%
<b>Total</b>	<b>\$14,438.3</b>	<b>100.0%</b>
<i>2017 Travel Expenditures</i>		
Public Transportation	\$1,268.4	9.2%
Auto Transportation	2,616.4	19.1%
Lodging	3,428.2	25.0%
Foodservice	4,188.0	30.5%
Entertainment & Recreation	964.9	7.0%
General Retail Trade	1,262.3	9.2%
<b>Total</b>	<b>\$13,728.4</b>	<b>100.0%</b>
<i>Percent Change 2018 over 2017</i>		
Public Transportation	7.7%	
Auto Transportation	8.3%	
Lodging	4.9%	
Foodservice	3.4%	
Entertainment & Recreation	3.6%	
General Retail Trade	3.9%	
<b>Total</b>	<b>5.2%</b>	

Source: U.S. Travel Association

## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2018

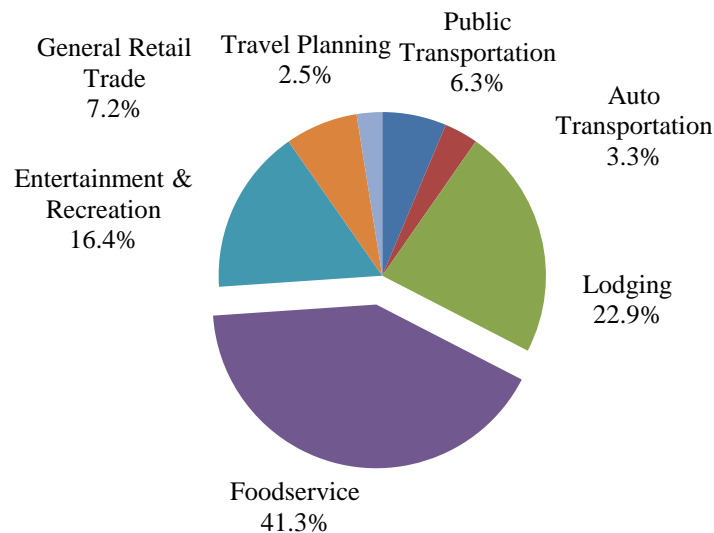
### Travel-Supported Payroll

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 \$2.7 billion in 2018. This represented an increase of 3.9 percent from 2017.

- On average, every dollar spent by domestic travelers produced 18.6 cents in wage and salary income for South Carolina residents in 2018.
- In 2018, the foodservice sector posted the largest payroll generated by domestic traveler spending with more than \$1.1 billion, accounting for 41.3 percent of the state total domestic travel-generated payroll.
- The lodging sector ranked second with \$615.0 million in domestic travel-supported payroll income, representing 22.9 percent of the state total travel-generated payroll.
- Entertainment and recreation, the third largest contributor at \$439.9 million, accounted for 16.4 percent of the state payroll supported from domestic travel.
- General retail trade posted \$193.0 million in total payroll for a 7.2 percent share of the state's 2018 total domestic travel-supported payroll.

**Domestic Travel-Supported Payroll in South Carolina  
by Industry Sector - 2018**



**Table 6: Domestic Travel-Supported Payroll in South Carolina by Industry Sector, 2017-2018**

<i>2018 Payroll</i>	<b>Total</b> (\$ Millions)	<b>% of Total</b> (Percent)
Public Transportation	\$170.3	6.3%
Auto Transportation	89.8	3.3%
Lodging	615.0	22.9%
Foodservice	1,110.9	41.3%
Entertainment & Recreation	439.9	16.4%
General Retail Trade	193.0	7.2%
Travel Planning*	67.8	2.5%
<b>Total</b>	<b>\$2,686.6</b>	<b>100.0%</b>
<i>2017 Payroll</i>		
Public Transportation	\$162.0	6.3%
Auto Transportation	86.1	3.3%
Lodging	586.8	22.7%
Foodservice	1,076.6	41.6%
Entertainment & Recreation	425.6	16.5%
General Retail Trade	185.9	7.2%
Travel Planning*	62.3	2.4%
<b>Total</b>	<b>\$2,585.2</b>	<b>100.0%</b>
<i>Percent Change 2018 over 2017</i>		
Public Transportation	5.2%	
Auto Transportation	4.2%	
Lodging	4.8%	
Foodservice	3.2%	
Entertainment & Recreation	3.4%	
General Retail Trade	3.8%	
Travel Planning*	8.8%	
<b>Total</b>	<b>3.9%</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.

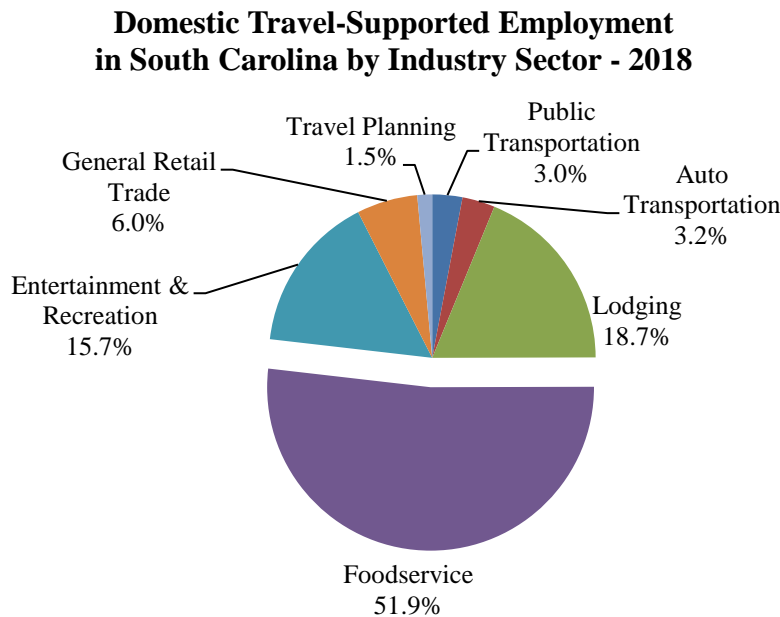
## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA - 2018

### 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 2018, domestic traveler spending in South Carolina supported 130,600 jobs, including full-time and seasonal/part-time positions in the state, an increase of 2.8 percent from 2017. In 2018, every \$110,539 spent by domestic travelers in South Carolina directly supported one job.

- The 130,600 jobs generated by domestic travel in South Carolina composed 6.1 percent of the state's total non-agricultural employment during 2018. Without these jobs supported by domestic travel, South Carolina's 2018 unemployment rate of 3.4 percent would have been 5.6 percentage points higher, to 9.0 percent.
- The foodservice sector, which includes restaurants and other eating and drinking places, provided more jobs than any other industry sector. During 2018, domestic traveler spending in this sector supported 67,700 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 24,500 jobs in 2018, which accounts for 18.7 percent of South Carolina's total jobs generated by domestic travel in 2018.



**Table 7: Domestic Travel-Supported Employment in South Carolina by Industry Sector, 2017-2018**

<i>2018 Employment</i>	<b>Total</b> (Thousand)	<b>% of Total</b> (Percent)
Public Transportation	3.9	3.0%
Auto Transportation	4.2	3.2%
Lodging	24.5	18.7%
Foodservice	67.7	51.9%
Entertainment & Recreation	20.5	15.7%
General Retail Trade	7.9	6.0%
Travel Planning*	1.9	1.5%
<b>Total</b>	<b>130.6</b>	<b>100.0%</b>
<i>2017 Employment</i>		
Public Transportation	3.7	2.9%
Auto Transportation	4.2	3.3%
Lodging	24.0	18.9%
Foodservice	66.0	51.9%
Entertainment & Recreation	19.8	15.6%
General Retail Trade	7.7	6.0%
Travel Planning*	1.8	1.4%
<b>Total</b>	<b>127.0</b>	<b>100.0%</b>
<i>Percent Change</i> <i>2018 over 2017</i>		
Public Transportation	6.1%	
Auto Transportation	1.4%	
Lodging	1.9%	
Foodservice	2.7%	
Entertainment & Recreation	3.6%	
General Retail Trade	2.6%	
Travel Planning*	8.0%	
<b>Total</b>	<b>2.8%</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.

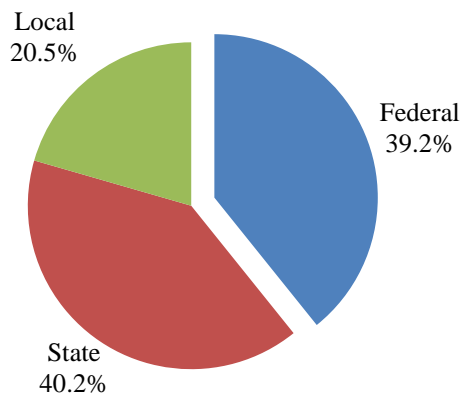
## DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA – 2018

### 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 2018, total tax revenue generated by domestic traveler spending in South Carolina reached \$2.1 billion, up 4.2 percent from 2017. On average, each travel dollar spent by domestic travelers in South Carolina produced 14.6 cents in tax receipts for federal, state and local governments in 2018.
- Domestic traveler spending in South Carolina generated \$824.8 million for the federal government in 2018, up 4.6 percent from 2017. The \$824.8 million represents 39.2 percent of all domestic travel-generated tax collections in the state. Each dollar spent by domestic travelers in South Carolina produced 5.7 cents for federal tax coffers.
- Spending by domestic travelers in South Carolina also generated \$846.2 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 40.2 percent of all domestic travel-generated tax revenue for 2018 collected in the state. On average, each domestic travel dollar produced 5.9 cents in state tax receipts. Total tax revenue generated by domestic travel for South Carolina state government increased 3.8 percent from 2017.
- Local governments in South Carolina directly benefited from domestic travel as well. During 2018, domestic travel spending generated \$431.7 million in sales and property tax revenue for the local governments, 20.5 percent of total domestic travel-generated tax revenue in the state. Each travel dollar produced 3.0 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue  
in South Carolina by Level of Government - 2018**





**Table 8: Domestic Travel-Generated Tax Revenue in South Carolina by Level of Government, 2017-2018**

<i>2018 Tax Revenue</i>	<b>Total</b> (\$ Millions)	<b>% of Total</b> (Percent)
Federal	\$824.8	39.2%
State	846.2	40.2%
Local	431.7	20.5%
<b>Total</b>	<b>\$2,102.7</b>	<b>100.0%</b>
<i>2017 Tax Revenue</i>		
Federal	\$788.7	39.1%
State	815.4	40.4%
Local	414.5	20.5%
<b>Total</b>	<b>\$2,018.5</b>	<b>100.0%</b>
<i>Percent Change 2018 over 2017</i>		
Federal	4.6%	
State	3.8%	
Local	4.2%	
<b>Total</b>	<b>4.2%</b>	

Source: U.S. Travel Association

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**DOMESTIC TRAVEL IMPACT  
ON SOUTH CAROLINA COUNTIES**

## **DOMESTIC TRAVEL IMPACT ON SOUTH CAROLINA COUNTIES, 2018**

Domestic travelers spent over \$14.4 billion while traveling in South Carolina during 2018, up 5.2 percent from 2017, not adjusted for inflation.

The top five counties in South Carolina received \$10.6 billion in direct domestic travel expenditures, 73.3 percent of the state total. Domestic travel spending in the top five counties supported more than \$2.0 billion in payroll (76.2 percent of the state total) and 101,400 jobs (77.6 percent of the state total) in 2018.

Additionally, domestic travel expenditures in the top five counties generated \$621.3 million in tax revenue for the state treasury (up 3.6 percent from 2017 and comprising 73.4 percent of the state total) and \$325.8 million in tax revenue for local governments (75.5 percent of the state total) during 2018.

### **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 2018. Domestic travel expenditures in Horry County reached over \$4.5 billion, accounting for 31.5 percent of the state total. These expenditures supported \$857.4 million in payroll income (a 4.4 percent increase from the previous year) and 43,900 jobs for the area residents.

**Charleston County** ranked second with nearly \$2.6 billion in domestic traveler spending in 2018, representing 17.8 percent of the state total. The payroll income and jobs directly attributable to domestic traveler spending reached \$502.9 million and 24,900 jobs.

**Beaufort County**, which includes the resort area of Hilton Head Island, posted more than \$1.4 billion in domestic traveler expenditures to rank third or 9.9 percent of the state total. These expenditures supported \$270.8 million in payroll as well as 14,600 jobs within the county.

**Greenville County** received \$1.3 billion from domestic travelers, 9.2 percent of the state total, to rank fourth in the state. These domestic travel expenditures benefited area residents with \$285.9 million in wages and salaries and 10,900 jobs.

**Richland County** ranked fifth with \$712.5 million in domestic travel expenditures in 2018 or 4.9 percent of the state total. These expenditures by domestic travelers supported \$128.9 million in payroll income and 7,100 thousand jobs for the area residents.

**Table 9: Domestic Travel Impact in South Carolina - Top 5 Counties, 2017 and 2018**

<i>2018 Impact</i>					
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
HORRY	\$4,544.4	\$857.4	43.9	\$281.4	\$163.2
CHARLESTON	2,568.3	502.9	24.9	149.7	84.3
BEAUFORT	1,434.0	270.8	14.6	87.2	42.1
GREENVILLE	1,325.0	285.9	10.9	57.1	19.9
RICHLAND	712.5	128.9	7.1	45.8	16.4
Top Five County Total	\$10,584.2	\$2,045.9	101.4	\$621.3	\$325.8
State Total	\$14,438.3	\$2,686.6	130.6	\$846.2	\$431.7
Share of Top 5 Counties	73.3%	76.2%	77.6%	73.4%	75.5%
<i>2017 Impact</i>					
HORRY	\$4,306.8	\$821.0	42.6	\$270.0	\$156.8
CHARLESTON	2,454.7	485.6	24.3	145.1	79.0
BEAUFORT	1,374.8	261.6	14.2	84.9	41.2
GREENVILLE	1,250.5	272.9	10.6	55.2	19.5
RICHLAND	684.6	125.7	6.9	44.3	16.0
Top Five County Total	\$10,071.4	\$1,966.7	98.5	\$599.5	\$312.5
State Total	\$13,728.4	\$2,585.2	127.0	\$815.4	\$414.5
Share of Top 5 Counties	73.4%	76.1%	77.6%	73.5%	75.4%
<i>Percent Change 2018 over 2017</i>					
HORRY	5.5%	4.4%	3.2%	4.2%	4.1%
CHARLESTON	4.6%	3.6%	2.6%	3.2%	6.7%
BEAUFORT	4.3%	3.5%	3.0%	2.8%	2.1%
GREENVILLE	6.0%	4.8%	2.9%	3.5%	2.1%
RICHLAND	4.1%	2.6%	1.7%	3.4%	2.1%
Top Five County Total	5.1%	4.0%	2.9%	3.6%	4.3%
State Total	5.2%	3.9%	2.8%	3.8%	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 2018 and 2017. The estimates presented are for direct domestic travel expenditures and related economic impact.

- Table A shows the counties listed alphabetically, with 2018 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 2018 travel expenditures from highest to lowest.
- Table C shows the percent distribution for each impact measure in 2018.
- Table D shows the percent change in 2018 over 2017 estimates for each of the measures of economic impact.
- Table E shows the counties listed alphabetically, with 2017 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

Table A: Alphabetical by County, 2018

<b>2018 Impact of Travel on South Carolina</b>					
<b>Table A: Alphabetical by County, 2018</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	\$7.54	\$1.02	0.05	\$0.47	\$0.50
AIKEN	139.99	22.57	1.04	8.01	2.81
ALLENDALE	4.30	0.62	0.03	0.30	0.15
ANDERSON	186.34	26.78	1.41	12.96	4.96
BAMBERG	7.06	0.97	0.05	0.47	0.21
BARNWELL	10.39	1.55	0.08	0.69	0.27
BEAUFORT	1,433.99	270.78	14.59	87.24	42.09
BERKELEY	150.74	24.70	1.16	10.05	5.07
CALHOUN	3.41	0.43	0.02	0.22	0.20
CHARLESTON	2,568.29	502.92	24.93	149.72	84.32
CHEROKEE	44.63	7.63	0.39	3.01	0.91
CHESTER	25.19	3.99	0.21	1.70	0.43
CHESTERFIELD	19.11	2.93	0.15	1.32	0.71
CLARENDON	55.82	7.92	0.38	3.48	3.62
COLLETON	122.44	22.05	1.11	7.86	3.52
DARLINGTON	38.09	5.50	0.28	2.75	1.05
DILLON	45.77	8.29	0.44	3.10	1.11
DORCHESTER	102.56	17.51	0.86	7.28	1.91
EDGEFIELD	9.76	1.36	0.06	0.71	0.39
FAIRFIELD	14.78	2.18	0.11	0.90	0.89
FLORENCE	338.32	61.66	2.74	18.88	7.94
GEORGETOWN	371.66	64.26	3.34	22.73	15.20
GREENVILLE	1,325.04	285.91	10.86	57.10	19.87
GREENWOOD	56.58	9.25	0.48	3.86	1.27
HAMPTON	13.92	2.33	0.12	0.93	0.27
HORRY	4,544.36	857.36	43.94	281.43	163.18
JASPER	70.89	13.48	0.73	4.60	2.30



Table A: Alphabetical by County, 2018

<b>2018 Impact of Travel on South Carolina</b>					
<b>Table A: Alphabetical by County, 2018 (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	57.23	8.91	0.43	3.77	2.58
LANCASTER	34.33	5.41	0.29	2.21	0.90
LAURENS	54.84	8.63	0.40	3.55	2.50
LEE	5.33	0.66	0.04	0.37	0.20
LEXINGTON	620.82	108.33	3.59	22.57	12.67
MCCORMICK	8.49	1.55	0.09	0.51	0.26
MARION	13.69	1.77	0.09	0.93	0.55
MARLBORO	12.31	1.88	0.09	0.79	0.35
NEWBERRY	36.86	5.43	0.26	2.39	1.88
OCONEE	66.21	10.13	0.48	4.29	3.32
ORANGEBURG	153.51	25.76	1.35	9.91	5.03
PICKENS	117.09	21.23	0.98	7.72	3.68
RICHLAND	712.49	128.93	7.06	45.83	16.38
SALUDA	4.58	0.52	0.02	0.30	0.27
SPARTANBURG	451.05	66.68	2.58	23.41	7.24
SUMTER	96.47	16.70	0.82	6.57	2.24
UNION	13.44	2.04	0.11	0.97	0.21
WILLIAMSBURG	10.14	1.17	0.06	0.75	0.32
<u>YORK</u>	<u>258.45</u>	<u>44.90</u>	<u>2.31</u>	<u>17.60</u>	<u>6.01</u>
<b>State Totals</b>	<b>\$14,438.30</b>	<b>\$2,686.63</b>	<b>130.62</b>	<b>\$846.20</b>	<b>\$431.72</b>

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Table B: Ranking of Counties by Expenditure Levels, 2018

<b>2018 Impact of Travel on South Carolina</b>					
<b>Table B: Ranking of Counties by Expenditure Levels, 2018</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	\$4,544.36	\$857.36	43.94	\$281.43	\$163.18
CHARLESTON	2,568.29	502.92	24.93	149.72	84.32
BEAUFORT	1,433.99	270.78	14.59	87.24	42.09
GREENVILLE	1,325.04	285.91	10.86	57.10	19.87
RICHLAND	712.49	128.93	7.06	45.83	16.38
LEXINGTON	620.82	108.33	3.59	22.57	12.67
SPARTANBURG	451.05	66.68	2.58	23.41	7.24
GEORGETOWN	371.66	64.26	3.34	22.73	15.20
FLORENCE	338.32	61.66	2.74	18.88	7.94
YORK	258.45	44.90	2.31	17.60	6.01
ANDERSON	186.34	26.78	1.41	12.96	4.96
ORANGEBURG	153.51	25.76	1.35	9.91	5.03
BERKELEY	150.74	24.70	1.16	10.05	5.07
AIKEN	139.99	22.57	1.04	8.01	2.81
COLLETON	122.44	22.05	1.11	7.86	3.52
PICKENS	117.09	21.23	0.98	7.72	3.68
DORCHESTER	102.56	17.51	0.86	7.28	1.91
SUMTER	96.47	16.70	0.82	6.57	2.24
JASPER	70.89	13.48	0.73	4.60	2.30
OCONEE	66.21	10.13	0.48	4.29	3.32
KERSHAW	57.23	8.91	0.43	3.77	2.58
GREENWOOD	56.58	9.25	0.48	3.86	1.27
CLARENDON	55.82	7.92	0.38	3.48	3.62
LAURENS	54.84	8.63	0.40	3.55	2.50
DILLON	45.77	8.29	0.44	3.10	1.11
CHEROKEE	44.63	7.63	0.39	3.01	0.91
DARLINGTON	38.09	5.50	0.28	2.75	1.05

Table B: Ranking of Counties by Expenditure Levels, 2018

<b>2018 Impact of Travel on South Carolina</b>						
<b>Table B: Ranking of Counties by Expenditure Levels, 2018 (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	36.86	5.43	0.26	2.39	1.88	
LANCASTER	34.33	5.41	0.29	2.21	0.90	
CHESTER	25.19	3.99	0.21	1.70	0.43	
CHESTERFIELD	19.11	2.93	0.15	1.32	0.71	
FAIRFIELD	14.78	2.18	0.11	0.90	0.89	
HAMPTON	13.92	2.33	0.12	0.93	0.27	
MARION	13.69	1.77	0.09	0.93	0.55	
UNION	13.44	2.04	0.11	0.97	0.21	
MARLBORO	12.31	1.88	0.09	0.79	0.35	
BARNWELL	10.39	1.55	0.08	0.69	0.27	
WILLIAMSBURG	10.14	1.17	0.06	0.75	0.32	
EDGEFIELD	9.76	1.36	0.06	0.71	0.39	
MCCORMICK	8.49	1.55	0.09	0.51	0.26	
ABBEVILLE	7.54	1.02	0.05	0.47	0.50	
BAMBERG	7.06	0.97	0.05	0.47	0.21	
LEE	5.33	0.66	0.04	0.37	0.20	
SALUDA	4.58	0.52	0.02	0.30	0.27	
ALLENDALE	4.30	0.62	0.03	0.30	0.15	
<u>CALHOUN</u>	<u>3.41</u>	<u>0.43</u>	<u>0.02</u>	<u>0.22</u>	<u>0.20</u>	
<b>State Totals</b>	<b>\$14,438.30</b>	<b>\$2,686.63</b>	<b>130.62</b>	<b>\$846.20</b>	<b>\$431.72</b>	

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Table C: Percent Distribution by County, 2018

<b>2018 Impact of Travel on South Carolina</b> <b>Table C: Percent Distribution by County, 2018</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%	0.11%
AIKEN	0.97%	0.84%	0.80%	0.95%	0.65%
ALLEDALE	0.03%	0.02%	0.03%	0.04%	0.04%
ANDERSON	1.29%	1.00%	1.08%	1.53%	1.15%
BAMBERG	0.05%	0.04%	0.04%	0.06%	0.05%
BARNWELL	0.07%	0.06%	0.06%	0.08%	0.06%
BEAUFORT	9.93%	10.08%	11.17%	10.31%	9.75%
BERKELEY	1.04%	0.92%	0.89%	1.19%	1.17%
CALHOUN	0.02%	0.02%	0.02%	0.03%	0.05%
CHARLESTON	17.79%	18.72%	19.09%	17.69%	19.53%
CHEROKEE	0.31%	0.28%	0.30%	0.36%	0.21%
CHESTER	0.17%	0.15%	0.16%	0.20%	0.10%
CHESTERFIELD	0.13%	0.11%	0.12%	0.16%	0.16%
CLARENDON	0.39%	0.29%	0.29%	0.41%	0.84%
COLLETON	0.85%	0.82%	0.85%	0.93%	0.81%
DARLINGTON	0.26%	0.20%	0.22%	0.33%	0.24%
DILLON	0.32%	0.31%	0.33%	0.37%	0.26%
DORCHESTER	0.71%	0.65%	0.66%	0.86%	0.44%
EDGEFIELD	0.07%	0.05%	0.05%	0.08%	0.09%
FAIRFIELD	0.10%	0.08%	0.08%	0.11%	0.21%
FLORENCE	2.34%	2.30%	2.10%	2.23%	1.84%
GEORGETOWN	2.57%	2.39%	2.56%	2.69%	3.52%
GREENVILLE	9.18%	10.64%	8.32%	6.75%	4.60%
GREENWOOD	0.39%	0.34%	0.37%	0.46%	0.29%
HAMPTON	0.10%	0.09%	0.09%	0.11%	0.06%
HORRY	31.47%	31.91%	33.64%	33.26%	37.80%
JASPER	0.49%	0.50%	0.56%	0.54%	0.53%

Table C: Percent Distribution by County, 2018

<b>2018 Impact of Travel on South Carolina</b>					
<b>Table C: Percent Distribution by County, 2018 (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	0.40%	0.33%	0.33%	0.45%	0.60%
LANCASTER	0.24%	0.20%	0.22%	0.26%	0.21%
LAURENS	0.38%	0.32%	0.31%	0.42%	0.58%
LEE	0.04%	0.02%	0.03%	0.04%	0.05%
LEXINGTON	4.30%	4.03%	2.75%	2.67%	2.94%
MCCORMICK	0.06%	0.06%	0.07%	0.06%	0.06%
MARION	0.09%	0.07%	0.07%	0.11%	0.13%
MARLBORO	0.09%	0.07%	0.07%	0.09%	0.08%
NEWBERRY	0.26%	0.20%	0.20%	0.28%	0.44%
OCONEE	0.46%	0.38%	0.37%	0.51%	0.77%
ORANGEBURG	1.06%	0.96%	1.03%	1.17%	1.16%
PICKENS	0.81%	0.79%	0.75%	0.91%	0.85%
RICHLAND	4.93%	4.80%	5.41%	5.42%	3.79%
SALUDA	0.03%	0.02%	0.01%	0.04%	0.06%
SPARTANBURG	3.12%	2.48%	1.97%	2.77%	1.68%
SUMTER	0.67%	0.62%	0.63%	0.78%	0.52%
UNION	0.09%	0.08%	0.08%	0.11%	0.05%
WILLIAMSBURG	0.07%	0.04%	0.05%	0.09%	0.07%
<u>YORK</u>	<u>1.79%</u>	<u>1.67%</u>	<u>1.77%</u>	<u>2.08%</u>	<u>1.39%</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 2017

**2018 Impact of Travel on South Carolina**  
**Table D: Percent Change over 2017**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ABBEVILLE	2.31%	1.07%	0.44%	1.04%	0.42%
AIKEN	5.69%	4.10%	3.53%	5.08%	4.72%
ALLENDALE	4.23%	0.87%	0.14%	3.70%	4.01%
ANDERSON	3.71%	1.59%	0.81%	2.91%	0.87%
BAMBERG	2.59%	0.52%	-0.16%	1.62%	0.30%
BARNWELL	4.23%	2.26%	1.57%	3.28%	6.41%
BEAUFORT	4.31%	3.52%	2.98%	2.81%	2.11%
BERKELEY	9.90%	7.83%	5.78%	9.07%	10.29%
CALHOUN	3.20%	0.55%	-0.01%	2.42%	0.60%
CHARLESTON	4.63%	3.57%	2.59%	3.19%	6.70%
CHEROKEE	4.94%	2.16%	1.46%	4.08%	2.99%
CHESTER	2.31%	0.60%	-0.16%	1.26%	0.32%
CHESTERFIELD	2.94%	0.17%	-0.47%	2.15%	0.70%
CLARENDON	3.37%	2.44%	1.59%	2.12%	1.71%
COLLETON	3.09%	2.19%	1.32%	1.91%	0.76%
DARLINGTON	4.89%	1.81%	1.07%	4.27%	4.15%
DILLON	7.91%	6.10%	4.70%	7.18%	6.39%
DORCHESTER	4.43%	1.17%	0.75%	3.43%	2.05%
EDGEFIELD	6.08%	2.73%	1.99%	5.68%	3.85%
FAIRFIELD	4.42%	3.56%	3.16%	2.99%	2.74%
FLORENCE	5.26%	3.35%	2.60%	4.85%	4.64%
GEORGETOWN	3.11%	1.89%	1.16%	1.75%	1.20%
GREENVILLE	5.96%	4.78%	2.89%	3.46%	2.07%
GREENWOOD	5.90%	4.33%	3.59%	5.10%	8.30%
HAMPTON	2.27%	-0.28%	-0.66%	1.31%	0.21%
HORRY	5.52%	4.42%	3.25%	4.22%	4.10%
JASPER	3.77%	3.61%	2.74%	2.55%	1.67%

Table D: Percent Change over 2017

<b>2018 Impact of Travel on South Carolina</b>					
<b>Table D: Percent Change over 2017 (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	2.95%	1.94%	1.04%	1.83%	3.82%
LANCASTER	5.98%	5.14%	4.59%	4.88%	4.51%
LAURENS	2.63%	2.64%	2.12%	1.40%	0.63%
LEE	4.01%	1.57%	0.79%	3.27%	1.65%
LEXINGTON	7.64%	5.19%	4.12%	6.13%	6.30%
MCCORMICK	3.04%	1.83%	1.30%	1.74%	5.08%
MARION	4.63%	2.89%	1.95%	3.82%	2.50%
MARLBORO	4.47%	1.84%	0.91%	3.50%	2.48%
NEWBERRY	4.69%	3.16%	2.27%	3.61%	2.79%
OCONEE	2.98%	2.06%	1.24%	1.72%	0.72%
ORANGEBURG	2.77%	1.39%	0.81%	1.58%	0.70%
PICKENS	5.41%	5.59%	3.51%	4.55%	3.81%
RICHLAND	4.07%	2.60%	1.66%	3.41%	2.14%
SALUDA	4.12%	1.93%	1.40%	3.26%	1.90%
SPARTANBURG	6.89%	4.35%	3.51%	5.58%	10.37%
SUMTER	7.41%	5.58%	4.19%	6.81%	6.61%
UNION	5.20%	2.20%	1.52%	4.69%	8.25%
WILLIAMSBURG	4.51%	1.13%	-0.12%	4.08%	4.86%
<u>YORK</u>	<u>5.47%</u>	<u>3.63%</u>	<u>2.73%</u>	<u>4.59%</u>	<u>3.83%</u>
<b>State Totals</b>	<b>5.17%</b>	<b>3.92%</b>	<b>2.82%</b>	<b>3.78%</b>	<b>4.16%</b>

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Table E: Alphabetical by County, 2017

<b>2017 Impact of Travel on South Carolina</b>					
<b>Table E: Alphabetical by County, 2017</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	\$7.37	\$1.01	0.05	\$0.46	\$0.49
AIKEN	132.46	21.68	1.01	7.62	2.69
ALLENDALE	4.13	0.61	0.03	0.29	0.15
ANDERSON	179.68	26.35	1.40	12.60	4.92
BAMBERG	6.88	0.96	0.05	0.47	0.21
BARNWELL	9.97	1.52	0.08	0.66	0.26
BEAUFORT	1,374.80	261.57	14.17	84.86	41.22
BERKELEY	137.16	22.91	1.10	9.21	4.59
CALHOUN	3.30	0.43	0.02	0.21	0.20
CHARLESTON	2,454.68	485.60	24.31	145.09	79.02
CHEROKEE	42.53	7.47	0.39	2.89	0.88
CHESTER	24.63	3.97	0.21	1.68	0.43
CHESTERFIELD	18.56	2.92	0.16	1.29	0.70
CLARENDON	54.00	7.73	0.37	3.41	3.56
COLLETON	118.77	21.58	1.09	7.72	3.49
DARLINGTON	36.32	5.40	0.28	2.64	1.01
DILLON	42.42	7.82	0.42	2.89	1.05
DORCHESTER	98.21	17.31	0.85	7.04	1.88
EDGEFIELD	9.20	1.33	0.06	0.67	0.38
FAIRFIELD	14.15	2.11	0.10	0.88	0.86
FLORENCE	321.42	59.66	2.67	18.01	7.59
GEORGETOWN	360.46	63.07	3.30	22.34	15.02
GREENVILLE	1,250.47	272.85	10.56	55.19	19.46
GREENWOOD	53.43	8.87	0.46	3.67	1.17
HAMPTON	13.61	2.34	0.12	0.91	0.27
HORRY	4,306.77	821.05	42.56	270.04	156.75
JASPER	68.32	13.01	0.71	4.49	2.26



Table E: Alphabetical by County, 2017

<b>2017 Impact of Travel on South Carolina</b>					
<b>Table E: Alphabetical by County, 2017 (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	55.59	8.74	0.42	3.70	2.49
LANCASTER	32.39	5.15	0.27	2.10	0.86
LAURENS	53.43	8.40	0.39	3.50	2.48
LEE	5.12	0.65	0.04	0.35	0.19
LEXINGTON	576.76	102.99	3.45	21.27	11.92
MCCORMICK	8.24	1.52	0.09	0.50	0.25
MARION	13.08	1.72	0.09	0.89	0.53
MARLBORO	11.78	1.85	0.09	0.77	0.34
NEWBERRY	35.21	5.27	0.25	2.30	1.83
OCONEE	64.29	9.92	0.48	4.22	3.30
ORANGEBURG	149.36	25.41	1.34	9.76	4.99
PICKENS	111.08	20.10	0.94	7.39	3.54
RICHLAND	684.62	125.67	6.95	44.32	16.04
SALUDA	4.39	0.51	0.02	0.29	0.26
SPARTANBURG	421.98	63.90	2.49	22.17	6.56
SUMTER	89.81	15.82	0.79	6.15	2.10
UNION	12.78	2.00	0.10	0.93	0.20
WILLIAMSBURG	9.71	1.15	0.06	0.72	0.30
<u>YORK</u>	<u>245.04</u>	<u>43.33</u>	<u>2.25</u>	<u>16.83</u>	<u>5.79</u>
<b>State Totals</b>	<b>\$13,728.37</b>	<b>\$2,585.25</b>	<b>127.04</b>	<b>\$815.38</b>	<b>\$414.48</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) as 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 are 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 (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 (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