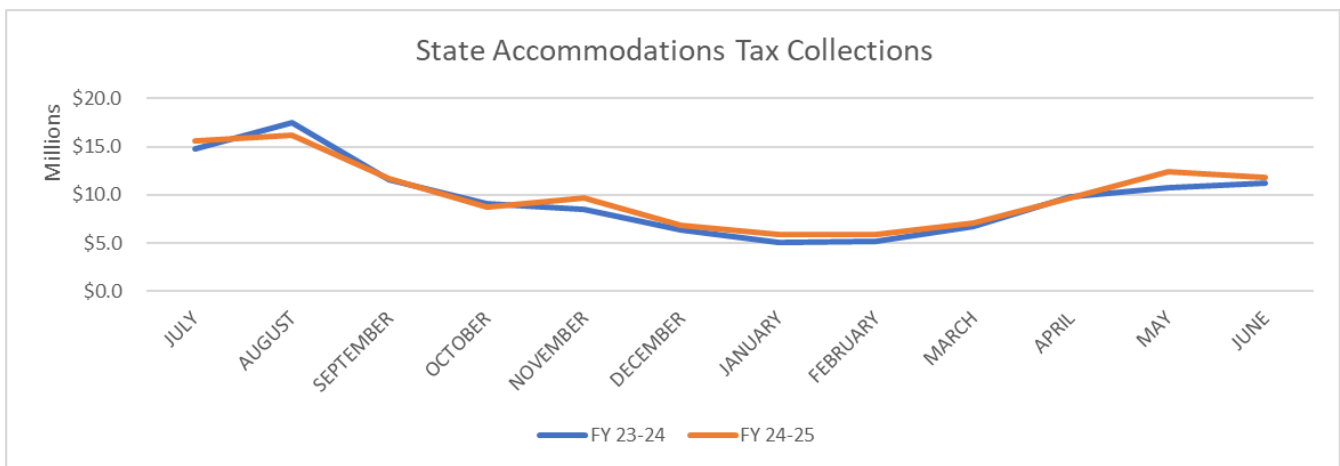


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AGENCY'S DISCUSSION AND ANALYSIS

TOURISM ECONOMY

State Accommodations Tax Collections in FY 24-25 totaled nearly \$121.4 million, a 4.4% increase over total collections in FY 23-24. Collectively, South Carolina's five coastal counties (Horry, Georgetown, Charleston, Colleton, Beaufort) generated approximately \$86.8 million in State Accommodations Taxes, a 0.9% increase over the previous fiscal year. South Carolina's six Upstate counties (Anderson, Oconee, Pickens, Greenville, Spartanburg, Cherokee) experienced a 16.5% increase in collections, which totaled nearly \$13.9 million for the year. The state's major destination counties in the Midlands (Aiken, Lexington, Sumter, Richland, York) experienced a 16.5% increase, totaling approximately \$11.9 million in FY 24-25. Many of South Carolina's rural counties experienced moderate increases in State Accommodations Tax collections in FY 24-25, including Orangeburg (+15.4%), Chester (+26.3%), and Greenwood (+19.6%).



Based on data from STR and AirDNA, Hotel Room Nights Sold in FY 24-25 increased by 3.5%, and Short Term Rental Room Nights Sold increased by 1.2%. In terms of revenue, Hotel Revenue increased by 6.5% and Short Term Rental Revenue increased by approximately 1.8%.

State Admissions Tax Collections in FY 24-25 totaled just over \$60.1 million, a 9.6% decrease compared to collections in FY 23-24. The state's five Coastal counties generated approximately \$30.7 million in Admissions Tax Collections, resulting in a 13.3% decrease compared to FY 23-24. The state's six Upstate counties collected over \$11.2 million, a 15.2% decrease compared to the previous fiscal year. And, the state's major destination counties in the Midlands generated approximately \$12.1 million in State Admissions Taxes, representing a 7.6% increase over FY 23-24 collections.

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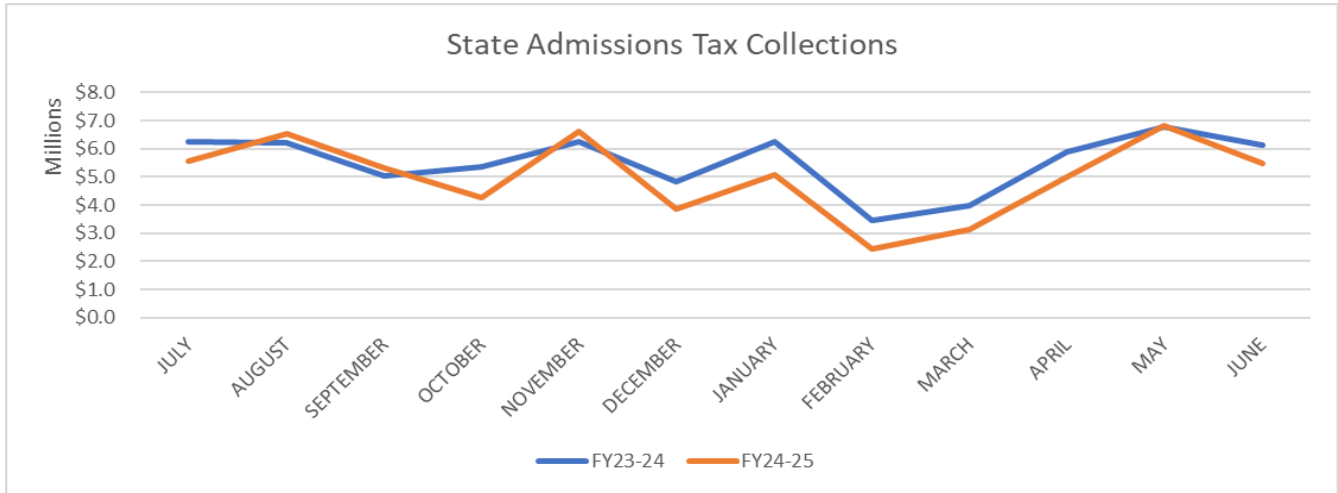
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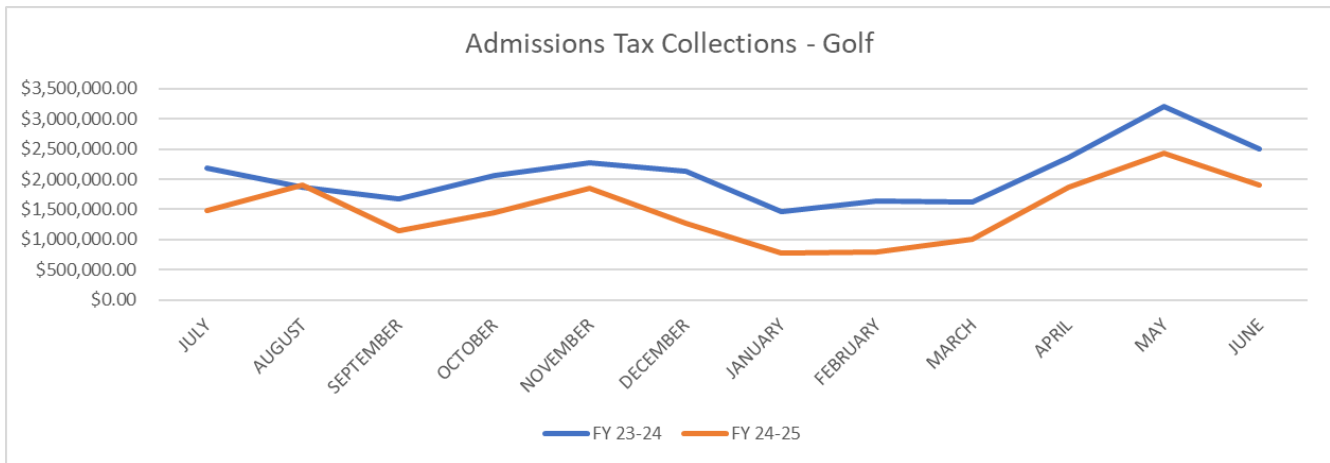
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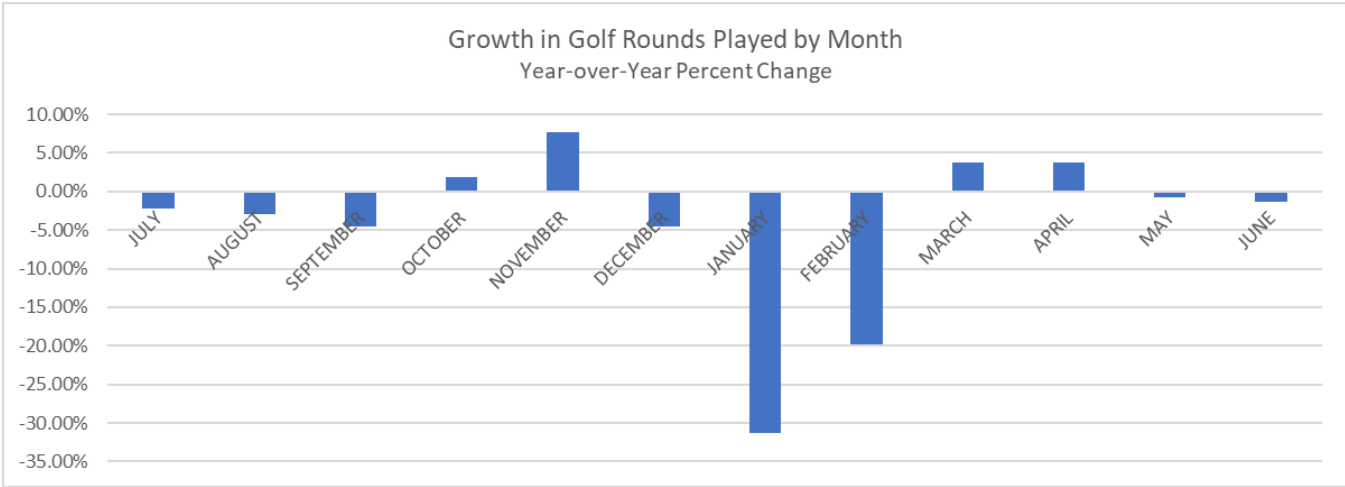
Admissions Tax Collections from Golf (a subset of State Admissions Tax Collections) totaled \$17.9 million in FY 24-25, a 28.5% decrease compared to collections in FY 23-24. South Carolina’s five Coastal counties generated over \$12.4 million in Golf-based Admissions Tax Collections, yielding a 24.0% decrease compared to the previous fiscal year. Golf-based Admissions Tax Collections in the state’s six Upstate counties totaled over \$1.5 million, representing a 57.5% decrease compared to FY 23-24. And, the state’s five major destination counties in the Midlands experienced a 17.8% decrease, with collections totaling nearly \$1.9 million.



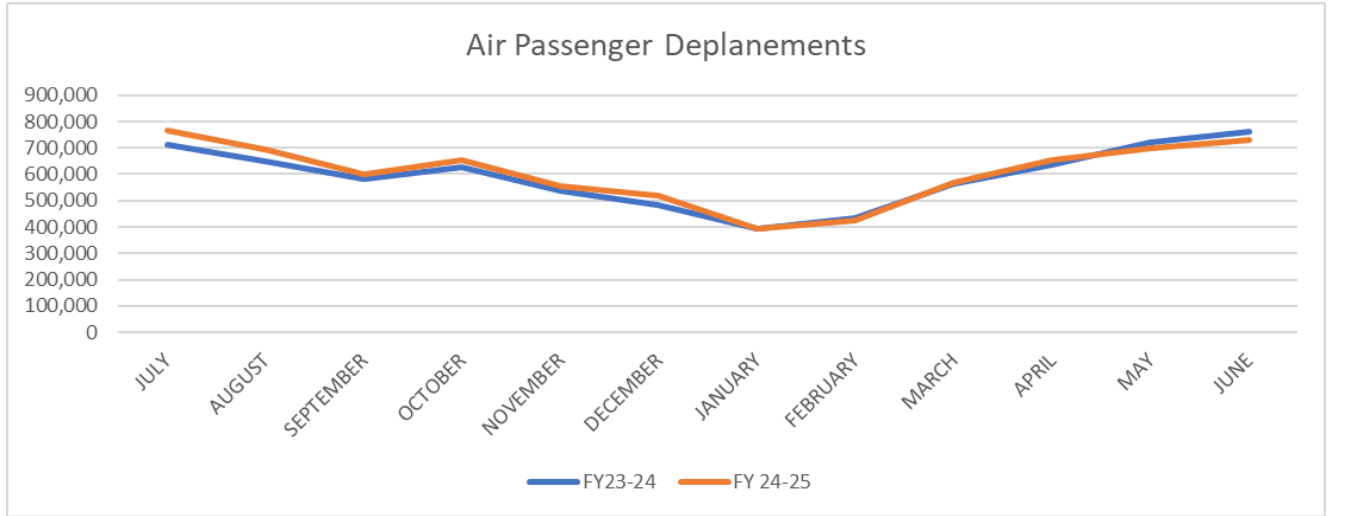
A possible reason for the overall decrease in Golf-based Admissions Tax Collections is the passage of an amendment to S.C. Code 12-21-2420 which exempted annual or monthly dues paid to a golf club from Admission Tax effective May 13, 2024. This amendment, in addition to weather events such as Hurricane Helene in 2024 and the January 2025 winter storm likely contributed to this decrease in Golf-based Admission Tax collections.

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Looking at the number of rounds played in South Carolina in FY 24-25, weather events such as Hurricane Helene and the January winter storm largely coincide with significant decreases in rounds played according to data from GolfDataTech. It is also possible that the decrease in rounds played was affected by estimated decreases in Canadian travel in the first half of 2025. Among the three major coastal golf destinations (Myrtle Beach, Charleston and Hilton Head Island), the number of rounds played in the Myrtle Beach area experienced the largest and most consistent decreases from January - June 2025, while Charleston and Hilton Head experienced fluctuating periods of increases and decreases over the six-month period.



Collectively, South Carolina’s five major airports (CHS, CAE, GSP, HHI, MYR) experienced a 2.2% increase in air passenger traffic in FY 24-25, with over 7.2 million deplanements total during the year. Totalling over 1.4 million deplanements, Greenville-Spartanburg International Airport experienced the largest passenger volume increase during the year (+124,148 over FY 23-24 totals). Columbia Metropolitan Airport experienced the second greatest increase (+25,351) followed by Myrtle Beach International Airport (+10,630). Charleston International Airport experienced minor increases in FY 24-25 (+3,567) while Hilton Head Island Airport experienced a 7,925 decrease in passenger traffic, with deplanements down 7.1% compared to FY 23-24.



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TOURISM MARKETING

SCPRT continued running multiple creative consumer leisure campaigns throughout FY 24-25, including the Darius Rucker “Come See Why I Love This Place” campaign, Wild Wonders in SC, and the Fall in SC, a cooler kind of summer campaign. Overall, these ads have continued to perform well and, through increased prolonged exposure in the marketplace, experienced consistent increases in advertising awareness and effectiveness. SCPRT’s FY 23-24 advertising campaign generated 42% awareness nationally, reaching about 40.1 million households. Awareness grew from 36% in FY 22-23 to 42% in FY 23-24. SCPRT spent \$0.10 per household reached, which indicates better than average efficiency compared to the industry norm of \$0.24 per household reached and ties with FY 19-20 as the most efficient campaign implemented by SCPRT.



FY 24-25 Creative Advertising Examples



The FY 23-24 advertising influenced about 816,000 Undiscovered South Carolina trips, with 158,000 coming from the 350-mile radius states, 249,000 coming from the 750-mile radius states, and 409,000 coming from the Remaining National states. Ad-influenced Undiscovered trips are up from 552,000 in FY 22-23 and 645,000 in FY 21-22 – but slightly below 933,000 in FY 20-21.

SCPRT’s Public Relations efforts in FY 24-25 resulted in 201 articles generated, representing an ad value of \$61.6 million and an estimated 13.1 billion impressions. In November, SCPRT partnered with the James Beard Foundation to showcase the state’s vibrant and diverse culinary scene at the Foundation’s new Platform by JBF space at Pier 57 in New York City. The two-night event spotlighted South Carolina’s 2024 Chef Ambassadors and featured both a public-facing consumer experience and an exclusive media activation—offering an immersive taste of the state’s rich food and beverage heritage.

SCPRT, in partnership with SC Department of Agriculture, announced the 2025 South Carolina Chef Ambassadors in January 2025. The 2025 Chef Ambassadors included Jeanne Koenigsberg, executive chef and kitchen general manager of Swamp Rabbit Cafe and Grocery, Greenville; Darren Smith, owner and executive chef of Rivertown Bistro and Bonfire, Conway; and, Shuai Wang, chef and owner of Jackrabbit Filly and King BBQ, North Charleston. Currently in its 11th year, the South Carolina Chef Ambassador program launched in 2014, unifying the major industries of tourism and agriculture, which collectively contribute tens of billions of dollars to the state’s economy and account for hundreds of thousands of jobs statewide.

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WELCOME CENTERS

SCPRT added Pee Dee Tourism Commission, Visit York County, City of Travelers Rest, and Arts & Heritage Center of North Augusta to the list of more than 40 partners in Discover South Carolina’s Front Porch Program in FY 24-25. Certified Front Porch program participants share information, promote special events, and provide SCPRT with up-to-date information about their destinations. This allows SCPRT’s nine Welcome Centers to share the latest and greatest information available about our destinations with our millions of visitors, helping increase visitation to those areas and improving visitor experience upon arrival. Program members receive an official window cling and certificate to promote their participation in the program; bulk copies of state maps and the Discover South Carolina Vacation Guide; and access to special training and events hosted by SCPRT’s expert travel staff.

STATE PARKS OPERATIONS

South Carolina State Parks operations and revenue were significantly impacted by weather and disaster events in FY 24-25, including Hurricane Debby (August 2024), Hurricane Helene (September 2024), and wildfires at Table Rock, Jones Gap and Caesars Head (March/April 2025). Of these, Hurricane Helene had the broadest and most detrimental impact, causing not only state park closures, but widespread physical damages as well.

Hurricane Helene made landfall on Sept. 26, bringing destructive winds, flooding, tornadoes, and extensive damage to utility infrastructure and homes throughout South Carolina, with significant damages occurring in the central to western Midlands and western portions of the Upstate. Immediately following Hurricane Helene, 28 of South Carolina’s 48 State Parks were closed due to damage and power outages. Of the 28 state parks that were directly impacted by Hurricane Helene, the most significant damages occurred at Redcliffe Plantation, Hickory Knob, Hamilton Branch, and Jones Gap state parks. Hurricane Helene presented significant recovery challenges because of the widespread destruction, power outages and communication disruptions.

SCPRT State Parks Central Office staff organized supply runs in the weeks immediately following the storm. Organized through the State Parks Service and Supply Warehouse in Columbia, SCPRT Central Office staff volunteered to bring supplies to various affected State Parks. These supplies included food and water, as well as tools and replacement parts for equipment when needed. South Carolina State Park staff were also assisted by State Park volunteers from Texas and Louisiana, who helped clear many of the fallen trees and debris so that the parks could become accessible. South Carolina State Parks also received a \$75,000 donation from the Duke Energy Foundation to assist with trail clearing at Table Rock and Jones Gap state parks. Jones Gap, which reopened in March 2025, was the last state park to reopen.

In terms of overall revenue, South Carolina State Parks experienced a nearly \$3.2 million decrease in annual revenue, representing a 6% decrease compared to the previous fiscal year. This decrease is directly reflected in decreases in nights sold for cabins and campsites in FY 24-25. While state parks impacted by events such as Hurricane Helene or the spring wildfires experiences sharp decreases in campsite and cabin revenues, unimpacted State Parks, such as Chester, Andrew Jackson, H Cooper Black, and Little Pee Dee experienced increases in cabin or camping nights sold.

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STATE PARKS CAPITAL PROJECTS

In August 2024, Chester State Park opened five new hike-in campsites that were funded by a \$40,000 grant from the Lutz Foundation. The new hike-in sites offer picturesque lake views and are equipped with a campfire ring, lantern holder, and picnic table. They have convenient access to a vault-style restroom. This is the tenth grant Chester State Park has received from the nonprofit. Lutz Foundation has funded the park’s upscale picnic pads, two camper cabins, renovations to Lakeview Hall, 27 holes of disc golf, a 472-foot boardwalk, and campground upgrades through previous grant awards.

In the first half of 2025, SCPRT opened new TRACK Trails at Aiken and Barnwell state parks. TRACK Trails are self-guided trails designed for kids and families. There are currently more than 300 TRACK Trails available throughout the country. Each trail has colorful, kid-friendly brochures that help turn an ordinary hike into a fun-filled, discovery-packed adventure. Both new TRACK Trails were funded through the support of the BlueCross Blue Shield of South Carolina Foundation and Diabetes Free SC. In addition to Barnwell and Aiken state parks, TRACK Trail adventures are also available at Oconee Station State Historic Site, Woods Bay State Park, Sesquicentennial State Park, Battle of Musgrove Mill Historic Site, Landsford Canal State Park, and Table Rock State Park.

TOURISM & RECREATION DEVELOPMENT

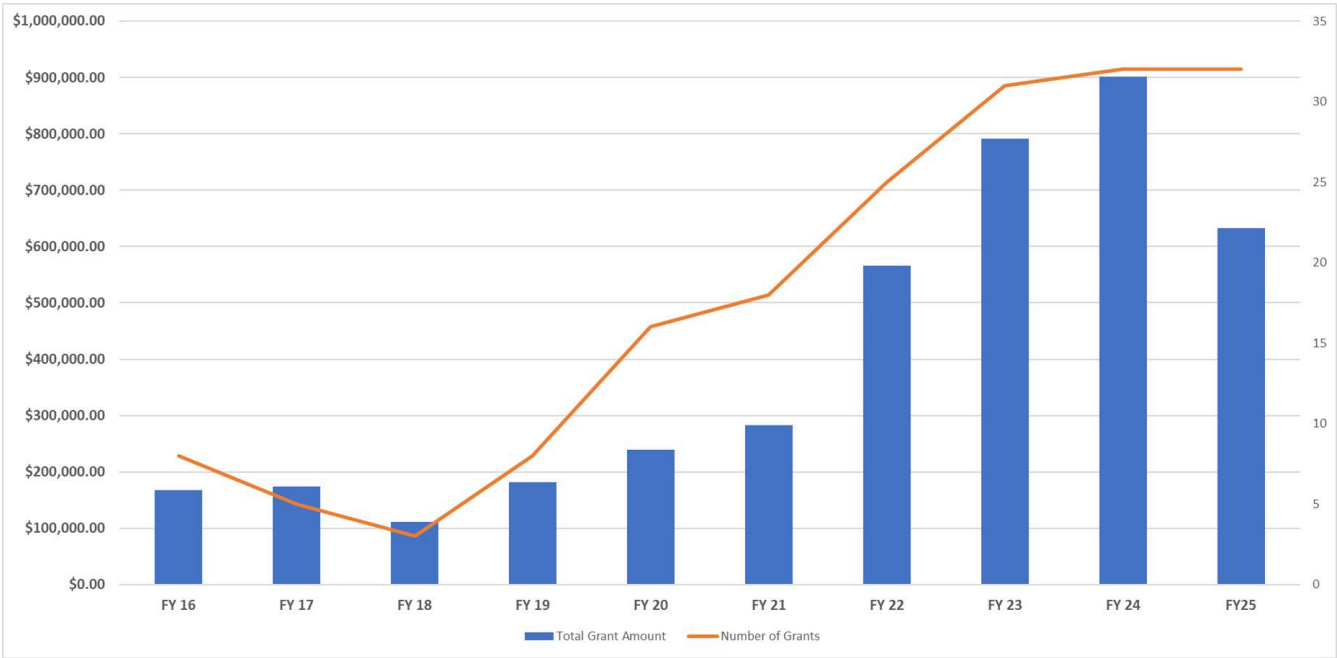
The Parks and Recreation Development Fund (PARD), a state-funded, noncompetitive grant program that assists local governments in the development of new public recreation facilities or renovation of existing facilities, awarded 74 new projects that totaled \$2,814,610.85 in FY 24-25. Proviso 49.10 in the SC Appropriations Act, which first went into effect in FY 20, allows PARD Funds to remain unexpended indefinitely until those funds are allocated to a specific project. Once a project is awarded, the Grantee has three years in which to complete the project. While this proviso has generally resulted in fewer applications per year compared to project quantities prior to the proviso, the ultimate effect of the proviso has been enabling local governments to conduct larger-scale projects using these funds, which allows these organizations to better meet the recreational needs of their respective populations.

SCPRT’s Undiscovered SC grant program, a state-funded program that provides assistance for the construction or renovation of publicly-owned tourism attractions in “undiscovered” parts of the state, received six applications in FY 24-25. Of these, five were determined to be eligible for funding and four projects were ultimately funded, based on the amount of funding available for the program. In total, these four projects were awarded \$750,000 in Undiscovered SC grant funding:

Project Sponsor	Project Title	Grant Award
York County	Catawba Bend Preserve: Disc Golf Course	\$200,000.00
Florence County	Lynches River Park Disc Golf Course Amenities	\$200,000.00
Anderson County	Green Pond Landing & Event Center – Amphitheater Power & Lighting	\$150,000.00
City of Mullins	Old Brick Square Park & Marketplace Stage and Amphitheater	\$200,000.00

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The Sports Tourism Advertising & Recruitment (STAR) grant program provides financial assistance to nonprofit tourism organizations, sports commissions and local governments for the recruitment of new sporting events in South Carolina. SCPRT has experienced continued growth in this program since FY 17-18, with year-over-year increases in both project volume and award amount totals. In FY 24-25, SCPRT awarded 32 STAR grants totaling just over \$630,000. These grants supported a wide range of sports events, including numerous fishing tournaments at Lake Hartwell, Lake Murray and the Santee-Cooper Lakes. Other events supported by this grant in FY 24-25 included Rivals in Red in Columbia, NCAA Division II Cross Country Regionals in Spartanburg, and the NJCAA Division I Tennis Championship in Florence.



SCPRT, in partnership with Clemson University, completed the Statewide Comprehensive Outdoor Recreation Plan (SCORP), a five-year plan that is required by Federal law for states to receive funding through the Land and Water Conservation Fund. Based on qualitative and quantitative data received from South Carolina resident surveys and recreation provider surveys, the 2025 SCORP outlined four major goals to guide recreation development in the state:

- Investing in South Carolina’s Outdoor Recreation Resources
- Outdoor Recreation for Everyone
- Outdoor Recreation and the Environment
- Managing Outdoor Recreation Benefits

A copy of the 2025 SCORP can be found on the Grants webpage on scprt.com.

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FILM

The South Carolina Film Office continued to experience success in the recruitment of television and feature film projects in FY 24-25 with the recruitment of four television or film projects. Successfully recruited projects in FY 24-25 included three feature films, *Suburban Psycho*, *Dark Star*, and *Straight Shot*, and one television series, *Outerbanks* Season 5.

Suburban Psycho, a Rough House production, was filmed in Charleston and Berkeley counties in late spring to early summer with nearly one hundred percent South Carolina film crew. *Dark Star*, a sci-fi project from Winter State Entertainment was budgeted to spend just over \$3.3 million during its production in Greenville and Spartanburg counties. And, *Straight Shot*, starring David A.R. White (of *God's Not Dead* franchise) and former Clemson student and action star Dolph Lundgren. With a \$2 million estimated budget, this Richland County-based production wrapped in mid-August.

At the time this report was submitted, *Outer Banks* was currently filming its fifth and final season in Charleston and Horry counties. All told over its first four seasons, this Netflix series has spent more than \$134,000,000 in South Carolina, including over 32,000 hotel room nights and wages for 6,800 South Carolina hires. Production for this last season is expected to generate an additional \$52 million to the series' total South Carolina spend and anticipated to add significantly to the 1.4 billion viewing hours the successful series has netted so far.



The SC Film Office partnered with SCDEW to capture some behind-the-scenes crew interviews and footage from the *Suburban Psycho* set for the ExploreSC@Work campaign, which is designed to highlight different industries and career paths available in South Carolina. SCDEW's marketing team interviewed several crew members, including the production's location manager, sound mixer, on-set greens technician, and second assistant accountant to create greater exposure for the broad array of employment opportunities these film projects provide. SCDEW also interviewed Matt Storm, Director of the South Carolina Film Commission, who shared the agency's efforts to recruit motion picture projects and partner with higher education institutions for crew education and development.

RISK ASSESSMENT & MITIGATION STRATEGIES

Tourism is critical to the state's economy and quality of life, generating billions of dollars in economic activity and providing employment for one in ten South Carolinians. As the State's tourism agency, SCPRT serves the critical function of coordinating statewide marketing and advertising efforts, providing local destinations with a comprehensive brand for tourism marketing and assistance through tourism marketing partnership initiatives and grant funding. If SCPRT was unable to achieve its tourism mission and goals, the state's tourism business communities would experience a loss in revenue to competitor destinations (domestically and internationally).

South Carolina State Parks serve two critical roles for the state: generating visitation and visitor spending in both established and rural destinations across the state and providing South Carolinians with opportunities for recreation and education. If SCPRT was unable to adequately provide services at SC State Parks, this would result in the loss of tourism revenue – not only for the State Parks, but also for nearby business communities. In addition, South Carolinians and visitors to the state would not have the opportunity to learn

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about the state's history and ecology through the experiences provided by SC State Parks. Ultimately, this would negatively impact the quality of life for current and future generations of South Carolinians and impede conservation efforts by the State to protect and preserve green space for future generations.

SCPRT provides broad support for local economies through its grant programs and film incentives. Recreation and tourism grants encourage new product development that yield revenue generating products and improve the quality of life for local communities. Similarly, film incentives help the state to secure film projects that generate employment opportunities for local film crew crews and spending with SC-based businesses. Without these types of projects, local communities would experience revenue losses and employment opportunities that help to ensure a high quality of life.

In order to avoid these risks, the State must ensure the following:

1. Sufficient funding for SCPRT's Statewide Marketing & Advertising Program
2. Sufficient funding for State Parks acquisition and development projects to allow SC State Parks to increase visitation capacities and ensure quality visitor experiences
3. Sufficient funding for SCPRT's tourism/recreation grant programs and film incentives to generate revenue for local economies