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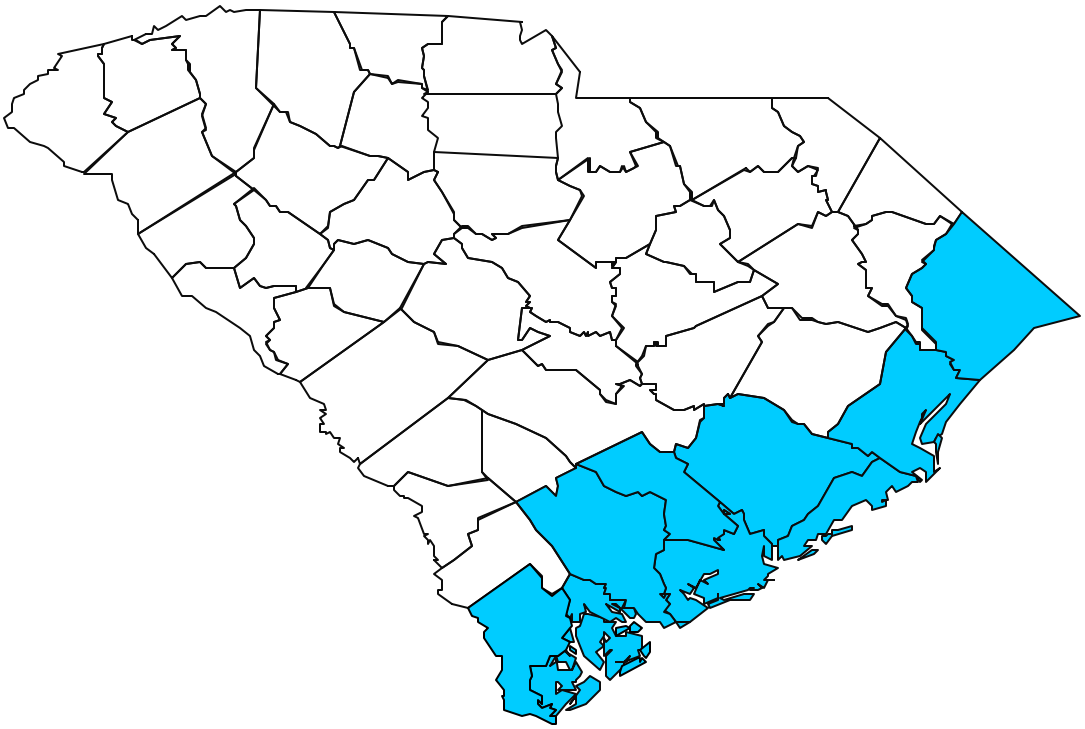
The Contribution of the Coast to the South Carolina Economy



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THE CONTRIBUTION OF THE COAST TO THE SOUTH CAROLINA ECONOMY

by

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Executive Summary

The South Carolina counties classified as coastal are Beaufort, Berkeley, Charleston, Colleton, Dorchester, Georgetown, Horry and Jasper. These are the eight counties that comprise the coastal zone management region of the **Ocean and Coastal Resource Management** division of the South Carolina Department of Health and Environmental Control.

From 1990 to 2000:

- The eight coastal counties had approximately one-fourth of the state's growth in population (28.1%), households (29.3%), labor force (28.8%), employment (20.1%), and income (27.1%);
- Growth in population along the coast concentrated in Horry and Beaufort counties; Horry led growth in employment, with Beaufort, Charleston, and Berkeley counties providing significant contributions;
- The coastal counties of Colleton and Jasper experienced relatively rapid growth in economic activity, but their overall contribution to coastal and state growth was minor.

Near the start of the 21st century in South Carolina:

- State industry output was $184 billion with $40 billion generated in the eight coastal counties. Total output of the coastal economy matched its population share (22.0%);
- About 560,000 of the state's 2.2 million employees worked in the coastal counties.

- Coastal counties contributed more than their population share to employment (25.0% of the state total), employee compensation (22.9%), proprietor income (25.8%), property income (25.6%), indirect business taxes (26.1%) and total value added (24.0%).

Service; Trade; and Finance, Insurance, and Real Estate sectors led coastal growth:

- Services employment growth was about 30% above the employment change predicted based on national and industry trends.
- Coastal output made up 31% of state output in Finance-Insurance-Real Estate (FIRE), 28.5% of state output of Services, and 25.3% of Trade output.
- One in four state jobs in Services, Trade and FIRE were in coastal counties.
- Nearly 30% of state value added in Services, Trade and FIRE was generated along the coast.
- 2000 per capita income of the coastal region ($20,189) was higher than the level for noncoastal counties ($18,344).
- Resident income *in coastal tracts* was about $5.2 billion in 2000. Other residents in the coastal region accounted for about $12.6 billion in income. Overall, the residents of coastal tracts accounted for 29% of total income in the eight counties.
- In the highest income group, households with more than $75,000 in income, the coastal tracts made up 36% of all coastal region income.
- Nearly one in ten new, South Carolina residents over the 1990s were attracted to Horry County, alone; Beaufort garnered another 7% of the new S.C. residents.
- While Charleston's loss of the naval base slowed its population growth, income grew impressively.

- Together, the “big three” coastal counties - Beaufort, Horry and Charleston - continue to drive the coastal economy. Economic and demographic trends suggest that they will continue to expand steadily over the next decade and propel the coastal region to an increasing share of state economic activity.

THE CONTRIBUTION OF THE COAST TO THE SOUTH CAROLINA ECONOMY

I. Introduction

It is no surprise to anyone who has visited the beaches of South Carolina from Myrtle Beach to Hilton Head that the coast of South Carolina is a vibrant and expanding economic region. However, the magnitude of the contribution that the coast makes to the state economy is often overlooked. This is unfortunate because the coast is well positioned to become a key driver of state economic growth over the next decade as the national economy continues its move to service activities as a leading economic base.

In this report, we provide two levels of analysis on the role that the coast makes to the level and growth of the state's economy. First, we document the contribution that the eight South Carolina coastal counties make to state economic activity. The South Carolina counties classified as coastal are Beaufort, Berkeley, Charleston, Colleton, Dorchester, Georgetown, Horry and Jasper. These are the eight counties that comprise the coastal zone management region of the **Ocean and Coastal Resource Management** division of the South Carolina Department of Health and Environmental Control. Coastal employment, output and value added are compared with state totals to find the coastal shares of state economic activity and the coast's role in state growth over the 1990s.

The second level of analysis focuses geographically on South Carolina census tracts that are contiguous to the coast. Economic and demographic changes from 1990 to 2000 in these coastal tracts are used to contrast coastal and non-coastal tract growth from 1990 to 2000. Finally, we examine the economic impacts of consumer spending by coastal tract residents on the coastal region economy.

II. Coastal Shares of State Economic Activity.

Databases used to identify coastal economic and demographic trends include: U. S. Census for 1990 and 2000, the Regional Economic Information Service (REIS) of the U.S. Department of Commerce, and the Impact Model for Planning (IMPLAN). Additionally, using IMPLAN, social accounting matrices (SAMs) are estimated for the coastal counties and the state. The SAMs are used to derive a consistent profile of economic activity by major industry across the state and each coastal county. Metrics of economic activity included the contributions of coastal counties to state output, value added and employment.[1]

Table 1 presents a summary of the contributions that the coast made to the state economy. Industry output across ten major industry divisions summed to a total of $184 billion in the state in 1998 with $40 billion generated in the eight coastal counties. About 560,000 of the state's 2.2 million employees worked in the coastal counties. The leading employers in the state were Services (545,848), Trade (488,383), Government (378,089) and Manufacturing (368,110). The coast was a major player in each of these industries with the exception on Manufacturing. Along the coast, the leading employers included Services (156,993), Trade (133,955), Government (103,997), Construction (49,917),

[1] Output estimates represent the gross revenues (sales revenues) earned by all establishments in a sector with the exception of trade. For example, hotel sector output is the total revenue earned by each hotel. Similarly, restaurant (eating and drinking) output is the gross revenues (sales revenues) earned by all restaurants.

The only exceptions to the definition of output as gross revenues are in the wholesale and retail trade sectors. For wholesalers and retail stores, only the trade markup between what they pay for goods and their sales revenues are counted as output. Value added is the difference between total output (sales) and the cost of purchased inputs needed to produce a good or service. It can be broken down into four main components: **Employee compensation** (wages, salaries and fringe benefits), **Proprietary income** (income earned by the self-employed – sole proprietors or owners of small businesses like retail stores, doctors and lawyers), **Other property type income** (rents, royalties, dividends distributed to individuals and other corporate profits), and **Indirect business taxes** (excise taxes, property taxes, fees, licenses and sales taxes paid by businesses). These definitions are from MIG, Inc. 1999. *IMPLAN Professional, Version 2.0 Users Guide*. MIG: Stillwater, Mn.

Finance-Insurance-Real Estate or FIRE (37,348). Manufacturing along the coast provided 39,057 jobs in 1998.

Value added (the sum of employee compensation, proprietor income, property income and indirect business taxes) emphasizes the relative importance of manufacturing outside the coast. For the entire state, Manufacturing value added ($21.4 billion) exceeded that for any other industry. However, along the coast, value added in Manufacturing ($2.294 billion) ranked below Government ($4.879 billion), Services

Table 1. South Carolina and South Carolina Coast Output, Value Added and Employment

Industry	Industry Output*	Industry Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect* Business Tax	Total* Value Added
South Carolina							
Agriculture	$2,643	53,828	$313	$348	$486	$103	$1,249
Mining	$293	2,044	$79	$0	$71	$9	$159
Construction	$17,036	175,722	$4,438	$927	$527	$128	$6,019
Manufacturing	$66,980	368,110	$14,252	$618	$5,916	$644	$21,430
TCPU	$11,564	81,414	$2,899	$236	$3,036	$702	$6,874
Trade	$22,320	488,383	$9,382	$620	$3,262	$3,075	$16,339
FIRE	$19,866	129,551	$2,920	$674	$8,842	$1,860	$14,296
Services	$25,727	545,848	$11,580	$2,105	$1,972	$518	$16,175
Government	$16,950	378,089	$12,496	$0	$3,137	$0	$15,633
Other	$686	20,630	$170	$0	$516	$0	$686
Totals	**$184,066**	**2,243,619**	**$58,528**	**$5,530**	**$27,764**	**$7,038**	**$98,860**
South Carolina Coast							
Agriculture	$708	11,975	$88	$59	$195	$46	$389
Mining	$41	326	$9	$0	$6	$1	$17
Construction	$4,748	49,917	$1,194	$258	$143	$35	$1,629
Manufacturing	$7,904	39,057	$1,510	$50	$663	$72	$2,294
TCPU	$2,507	20,802	$643	$49	$508	$112	$1,313
Trade	$5,648	133,955	$2,374	$163	$800	$747	$4,084
FIRE	$6,142	37,348	$654	$264	$2,863	$636	$4,417
Services	$7,328	156,993	$3,135	$583	$652	$185	$4,555
Government	$5,256	103,997	$3,724	$0	$1,155	$0	$4,879
Other	$176	6,629	$58	$0	$118	$0	$176
Totals	**$40,458**	**560,998**	**$13,389**	**$1,426**	**$7,104**	**$1,834**	**$23,752**

* Millions of Dollars.
TCPU is transportation, communications, public utilities; FIRE is finance, insurance and real estate. Base year is 1998. S.C. Coast includes Beaufort, Berkeley, Charleston, Colleton, Dorchester, Georgetown, Horry, and Jasper Counties.
Source: Micro IMPLAN Group, 2000.

($4.555 billion), FIRE ($4.417 billion), and Trade ($4.084 billion).

The contrast between the economic structure of the coast and the rest of the state, as well as the contributions of the coast to total state economic activity, are highlighted in Table 2. Each of the **boldface entries** in Table 2 indicates a coastal share that exceeded the coastal population share, 22.0%. Total output of the coastal economy matched its population share (22.0%); however, coastal counties contributed more than their population share to employment (25.0% of the state total), employee compensation (22.9%), proprietor income (25.8%), property income (25.6%), indirect business taxes (26.1%) and total value added (24.0%).

These shares of aggregate economic activity may understate the importance of the eight coastal counties to the state. In the fast growth industries (Services, FIRE and Trade), the coast outperformed the state. Coastal output made up 30.9% of state output in Finance-Insurance-Real Estate (FIRE), 28.5% of state output of Services, and 25.3% of Trade output. Similar coastal shares were evident for both employment and value added in these industries. Roughly one in four state jobs in Services, Trade and FIRE were in the eight coastal counties. Nearly 30% of state value added in these industries was generated along the coast. In contrast, the coast was a relatively small contributor to state Manufacturing employment (10.6%) and value added (10.7%). However, Manufacturing was a relatively slow growth industry, *in terms of job generation,* in the nation, state, and along the coast as documented in the final section of this report.

Table 2. South Carolina Coast as a Share of the State Totals

Industry	Output*	Industry Employment	Employee Compensation	Proprietor Income*	Property Income*	Indirect Bus. Tax*	Total Value Added*
Agriculture	**26.8%**	**22.2%**	**28.1%**	17.0%	**40.2%**	**44.8%**	**31.1%**
Mining	13.9%	15.9%	12.0%	0.0%	9.0%	12.0%	10.6%
Construction	**27.9%**	**28.4%**	**26.9%**	**27.8%**	**27.1%**	**27.0%**	**27.1%**
Manufacturing	11.8%	10.6%	10.6%	8.0%	11.2%	11.1%	10.7%
TCPU	21.7%	**25.6%**	**22.2%**	21.0%	16.7%	16.0%	19.1%
Trade	**25.3%**	**27.4%**	**25.3%**	**26.3%**	**24.5%**	**24.3%**	**25.0%**
FIRE	**30.9%**	**28.8%**	**22.4%**	**39.1%**	**32.4%**	**34.2%**	**30.9%**
Services	**28.5%**	**28.8%**	**27.1%**	**27.7%**	**33.0%**	**35.7%**	**28.2%**
Government	**31.0%**	**27.5%**	**29.8%**	0.0%	**36.8%**	0.0%	**31.2%**
Other	**25.7%**	**32.1%**	**34.1%**	0.0%	**22.9%**	0.0%	**25.7%**
Totals	**22.0%**	**25.0%**	**22.9%**	**25.8%**	**25.6%**	**26.1%**	**24.0%**

* Millions of Dollars. Source: Micro Implan Group, 2000.
TCPU is transportation, communications, public utilities; FIRE is finance, insurance and real estate.
Note: **Boldface** indicates Coastal Share exceeds Coastal Population Share of 22.0% in 2000. S.C. Coast includes Beaufort, Berkeley, Charleston, Colleton, Dorchester, Georgetown, Horry, and Jasper Counties. Base year is 1998.

In summary, both the aging of the baby boomers and the increasing share of service activity in the national and state economies are likely to expand the demand for employees to meet job growth along the coast of South Carolina. As documented in Tables 1 and 2, the eight coastal counties in South Carolina already accounted for about one in four jobs in the fast growth sectors of the state's economy. Accordingly, it is likely that the coast will become increasingly important to the overall growth of the South Carolina economy and the well being of its residents.

III. Coastal County Shares of Coastal Economic Activity.

Across the eight coastal counties, there is substantial variation in size and economic characteristics. Three coastal counties accounted for 75% the coast's contribution to economic activity in the state: Beaufort, Charleston, and Horry (see Table 3). Charleston was the overall dominant employer and producer of goods and services

with about 41% of the coastal totals. Horry was second in overall economic size with about 20% of coastal economic activity followed by Beaufort accounting for about 14% of the coastal economy. Together, Berkeley (10%), Dorchester (7%), Georgetown (5%), Colleton (3%) and Jasper (1%) generated about one-quarter of the coast's total contribution to the state economy. Output, employment and value added contributions of each county to the state's economy are shown in Appendix I.

In the next section of the report, demographic and economic changes over the past decade in the coastal counties are presented along with a look at important income and population trends in the counties and the census tracts that have a coastal connection.

Table 3. County Shares of Coast Totals: Output, Value Added and Employment

Beaufort County

Industry	Industry Output*	Employment	Employee Compensation	Proprietor Income*	Property Income*	Indirect BusinessTax	Total Value Added
Agriculture	9.1%	17.1%	24.5%	11.3%	6.2%	3.5%	10.8%
Mining	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Construction	15.2%	14.7%	16.4%	14.4%	16.1%	16.1%	16.1%
Manufacturing	3.8%	4.5%	5.0%	3.4%	6.9%	4.1%	5.5%
TCPU	11.8%	10.3%	11.4%	10.2%	16.2%	15.7%	13.6%
Trade	12.1%	12.3%	12.3%	11.7%	11.9%	11.7%	12.1%
FIRE	19.5%	17.8%	14.2%	19.7%	20.6%	21.5%	19.7%
Services	13.2%	12.4%	14.0%	10.2%	14.1%	14.8%	13.6%
Government	24.0%	19.3%	20.9%	0.0%	36.2%	0.0%	24.5%
Other	17.6%	20.8%	23.2%	0.0%	14.8%	0.0%	17.6%
Total	**13.7%**	**13.8%**	**14.8%**	**12.7%**	**19.4%**	**15.2%**	**16.1%**

Berkeley County

Industry	Industry Output*	Employment	Employee Compensation	Proprietor Income*	Property Income*	Indirect BusinessTax	Total Value Added
Agriculture	10.0%	7.7%	4.0%	10.5%	12.2%	13.3%	10.2%
Mining	5.0%	5.0%	6.6%	-8.8%	10.4%	5.9%	8.0%
Construction	12.9%	12.5%	14.1%	10.8%	13.6%	13.6%	13.5%
Manufacturing	24.1%	20.0%	24.4%	41.8%	16.9%	28.3%	22.7%
TCPU	7.5%	7.7%	7.6%	9.6%	8.9%	9.0%	8.3%
Trade	5.7%	6.2%	5.7%	6.6%	5.8%	5.8%	5.8%
FIRE	3.6%	3.5%	2.6%	3.6%	4.0%	3.8%	3.7%
Services	4.3%	5.3%	3.8%	5.1%	4.4%	4.1%	4.1%
Government	5.6%	6.9%	6.3%	0.0%	2.8%	0.0%	5.4%
Other	6.7%	4.5%	3.6%	0.0%	8.2%	0.0%	6.7%
Total	**9.7%**	**7.5%**	**8.2%**	**7.7%**	**6.1%**	**6.3%**	**7.4%**

Table 3. (Cont.)

Charleston County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	12.5%	22.8%	23.1%	19.4%	9.3%	4.5%	13.4%
Mining	22.1%	37.7%	40.9%	-43.7%	42.4%	27.3%	40.8%
Construction	35.9%	35.2%	37.2%	35.8%	37.0%	37.0%	37.0%
Manufacturing	28.5%	26.8%	26.1%	16.5%	30.8%	28.0%	27.3%
TCPU	53.5%	56.0%	54.6%	50.3%	42.5%	43.6%	48.8%
Trade	41.8%	38.8%	41.6%	41.5%	42.8%	43.3%	42.1%
FIRE	40.0%	39.9%	48.9%	37.0%	38.7%	38.2%	40.1%
Services	48.7%	46.4%	50.8%	51.4%	41.9%	39.3%	49.1%
Government	52.7%	51.7%	54.0%	0.0%	51.5%	0.0%	53.4%
Other	45.9%	45.1%	45.8%	0.0%	45.9%	0.0%	45.9%
Total	**41.1%**	**42.6%**	**45.9%**	**42.2%**	**40.4%**	**39.5%**	**43.5%**

Colleton County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	5.7%	6.8%	4.1%	10.9%	5.3%	4.8%	5.8%
Mining	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Construction	2.7%	2.9%	2.2%	3.2%	2.4%	2.4%	2.4%
Manufacturing	4.2%	6.1%	5.2%	4.6%	4.1%	3.7%	4.8%
TCPU	3.5%	2.5%	3.0%	3.3%	5.9%	6.0%	4.4%
Trade	2.6%	2.7%	2.6%	3.0%	2.8%	2.8%	2.7%
FIRE	1.7%	1.8%	1.7%	1.6%	1.7%	1.6%	1.7%
Services	1.8%	2.2%	1.6%	2.7%	1.4%	1.2%	1.7%
Government	1.5%	2.2%	1.7%	0.0%	0.8%	0.0%	1.5%
Other	2.6%	4.3%	3.2%	0.0%	2.4%	0.0%	2.6%
Total	**2.6%**	**2.8%**	**2.4%**	**3.1%**	**2.3%**	**2.5%**	**2.4%**

Table 3. (Cont.)

Dorchester County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	29.7%	9.7%	13.6%	8.2%	37.5%	44.6%	28.5%
Mining	13.1%	15.5%	24.3%	-17.5%	25.2%	16.2%	24.3%
Construction	6.3%	6.5%	6.0%	6.3%	6.1%	6.1%	6.1%
Manufacturing	13.0%	13.0%	13.7%	8.6%	14.5%	10.4%	13.7%
TCPU	5.8%	6.9%	6.7%	9.2%	4.5%	4.9%	5.8%
Trade	5.4%	5.8%	5.4%	6.3%	5.6%	5.7%	5.5%
FIRE	3.7%	3.2%	3.5%	2.6%	4.1%	3.7%	3.9%
Services	4.1%	4.8%	3.8%	4.3%	3.9%	3.8%	3.9%
Government	3.5%	4.9%	3.8%	0.0%	1.7%	0.0%	3.3%
Other	5.8%	7.5%	6.0%	0.0%	5.6%	0.0%	5.8%
Total	**6.7%**	**5.9%**	**5.6%**	**5.1%**	**5.9%**	**5.9%**	**5.7%**

Georgetown County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	10.5%	8.4%	8.1%	7.4%	10.8%	10.9%	9.7%
Mining	6.4%	7.2%	8.5%	-11.7%	13.3%	7.5%	10.3%
Construction	4.8%	5.1%	3.9%	5.5%	4.2%	4.2%	4.2%
Manufacturing	10.8%	10.2%	9.4%	9.6%	11.3%	10.4%	10.0%
TCPU	2.8%	2.9%	2.4%	2.9%	2.3%	2.2%	2.4%
Trade	4.5%	5.2%	4.4%	4.8%	4.3%	4.2%	4.4%
FIRE	5.1%	4.6%	3.7%	5.7%	5.3%	5.4%	5.1%
Services	3.8%	4.1%	3.9%	4.5%	3.6%	3.3%	3.9%
Government	3.1%	3.8%	3.3%	0.0%	1.7%	0.0%	2.9%
Other	4.1%	4.1%	3.6%	0.0%	4.4%	0.0%	4.1%
Total	**5.5%**	**4.9%**	**4.4%**	**5.2%**	**4.9%**	**4.8%**	**4.6%**

Table 3. (Cont.)

Horry County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	19.4%	24.9%	20.8%	28.9%	15.3%	15.2%	18.6%
Mining	53.4%	34.6%	19.8%	181.7%	8.8%	43.1%	16.6%
Construction	20.5%	21.4%	18.5%	22.1%	19.1%	19.1%	19.1%
Manufacturing	15.0%	18.5%	15.6%	14.1%	14.6%	14.6%	15.3%
TCPU	13.8%	12.8%	12.9%	13.1%	18.1%	16.9%	15.3%
Trade	26.9%	28.1%	27.0%	24.9%	26.0%	25.5%	26.5%
FIRE	26.0%	28.6%	24.9%	29.5%	25.2%	25.5%	25.5%
Services	23.3%	23.8%	21.4%	20.1%	29.6%	32.2%	22.9%
Government	8.7%	10.2%	9.2%	0.0%	4.8%	0.0%	8.2%
Other	16.3%	12.1%	13.1%	0.0%	17.8%	0.0%	16.3%
Total	**19.7%**	**21.5%**	**17.8%**	**22.7%**	**20.4%**	**24.9%**	**19.4%**

Jasper County

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect BusinessTax*	Total Value Added*
Agriculture	3.1%	2.7%	1.7%	3.5%	3.4%	3.1%	3.0%
Mining	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Construction	1.7%	1.8%	1.5%	1.9%	1.6%	1.6%	1.6%
Manufacturing	0.6%	0.9%	0.7%	1.4%	0.7%	0.6%	0.7%
TCPU	1.3%	1.0%	1.3%	1.3%	1.6%	1.6%	1.4%
Trade	1.0%	1.0%	0.9%	1.1%	1.0%	1.0%	0.9%
FIRE	0.3%	0.4%	0.4%	0.3%	0.4%	0.3%	0.4%
Services	0.8%	1.1%	0.7%	1.6%	1.1%	1.2%	0.9%
Government	0.8%	1.1%	0.9%	0.0%	0.4%	0.0%	0.8%
Other	1.1%	1.7%	1.5%	0.0%	0.9%	0.0%	1.1%
Total	**0.9%**	**1.1%**	**0.9%**	**1.4%**	**0.8%**	**0.8%**	**0.9%**

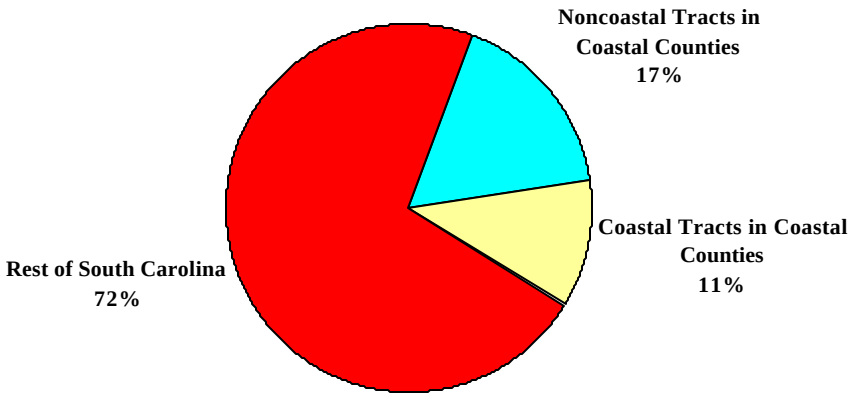
*Millions of dollars

Note: Base Year is 1998.

IV. Demographic and Economic Change in Coastal Counties, 1990-2000

The population of South Carolina's 46 counties increased by 525,000 from 1990 to 2000. Over one-fourth of the state's growth in population (147,819) occurred in the eight counties along the coast, and over 40% of the population growth in the coastal counties (60,300) was in the 46 census tracts (out of 169 tracts) with coastline (Figure 1). Coastal census tracts are located in only six of the eight coastal counties. No tracts were included for Berkeley and Dorchester counties. *Over 10% of the state's population growth from 1990 to 2000 occurred in the narrow band of census tracts adjacent to the Atlantic Ocean.*

Figure 1. Population Change in South Carolina, 1990 - 2000

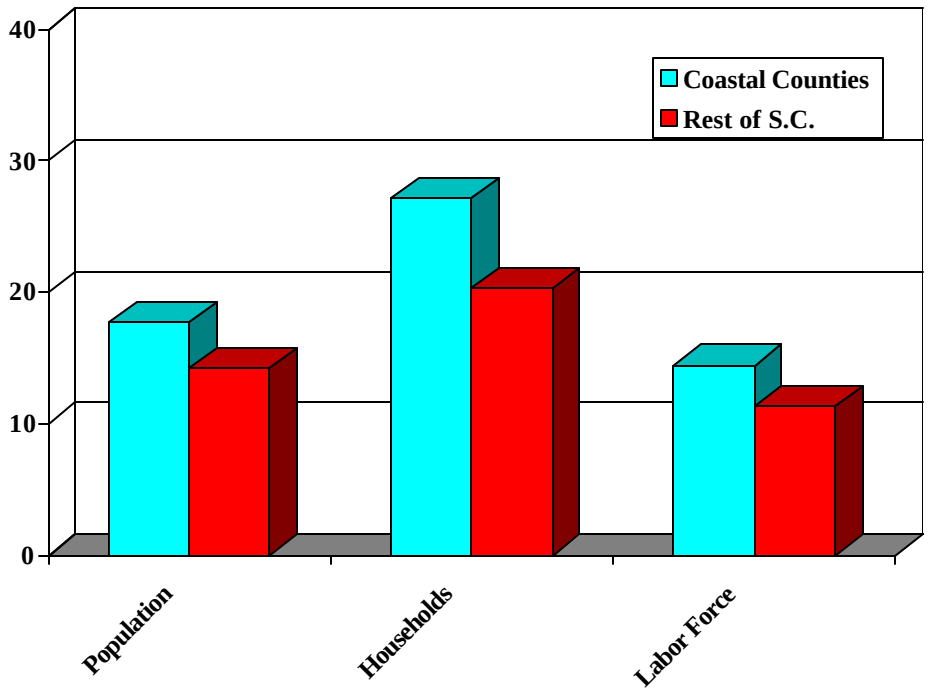


Source: 1990 & 2000 Census, U.S. Bureau of the Census

The South Carolina coastal counties, especially the coastal tracts within these counties, were significant contributors to the state's recent growth. Labor force growth rates in the coastal counties exceeded those of the rest of the state by approximately 25.0% (17.7% vs. 14.2% for population change and 14.4% vs. 11.3% for labor force

growth), and the number of households in coastal counties increased at a rate over 33.0% higher than the rate of household growth for noncoastal counties (27.1% vs. 20.3%). The more rapid growth of households relative to population and labor force reflects the attraction of retirees to the coastal areas. Retiree households generally consist of only one or two persons, and many retirees do not participate in the labor force.

Figure 2. Percentage Growth in Population, Households, and Labor Force, Coastal Counties and Rest of S.C., 1990 - 2000



Source: 1990 & 2000 Census, U.S. Bureau of the Census; REIS, Bureau of Economic Analysis

The 1990 to 2000 growth in population, households, and labor force for the eight coastal counties is presented in Table 4. All coastal counties experienced population growth, led by Horry County with 52,576 new residents and Beaufort County with

34,513 additional residents. In terms of relative growth, Beaufort County had the largest percentage change in population since 1990 (39.9%), followed by Horry (36.5%) and Jasper (33.5%) counties. Population change in Berkeley (10.8%), Charleston (5.1%) and Colleton (11.3%) counties was relatively slow, and these three counties had population growth rates less than the rate for the rest of the state (14.2%).

The change in the number of households in the coastal counties mirrors the findings for population change. Five of the counties (Beaufort with 48.3%, Horry with 46.7%, Georgetown with 33.1%, Jasper with 32.9%, and Dorchester with 23.0%) had growth rates for the number of households that exceeded the average for the rest of the state (20.8%). As before, the growth rates for households for Berkeley (17.8%), Charleston (15.1%) and Colleton (20.2%) counties lagged the rate of growth for the noncoastal part of the state.

County labor force is the number of county residents actively seeking or holding employment, regardless of where they hold jobs. All coastal counties except Berkeley, Charleston and Colleton had labor force growth rates that significantly exceeded the rate for the rest of South Carolina. For Berkeley, Georgetown, Horry, and Jasper Counties, the rate of growth of the labor force was almost identical to the counties' population growth rates. In these three counties, the labor force participation rates (labor force/population) remained relatively constant from 1990 to 2000. Thus, the share of county population that was working or seeking work (as opposed to retired, in school, or

Table 4. Growth in Households, Population, and Labor Force, Coastal Counties and Rest of S.C., 1990 - 2000

	Beaufort County	Berkeley County	Charleston County	Colleton County	Dorchester County	Georgetown County	Horry County	Jasper County	All Coastal Counties	Rest of S.C.
1990 Households	30,712	42,386	107,069	12,040	28,213	16,275	55,764	5,298	297,757	960,287
2000 Households	45,532	49,922	123,326	14,470	34,709	21,659	81,800	7,042	378,460	1,155,394
Percent Change	48.3%	17.8%	15.2%	20.2%	23.0%	33.1%	46.7%	32.9%	27.1%	20.3%
1990 Population	86,425	128,776	295,039	34,377	83,060	46,302	144,053	15,487	833,519	2,653,184
2000 Population	120,937	142,651	309,969	38,264	96,413	55,797	196,629	20,678	981,338	3,030,674
Percent Change	39.9%	10.8%	5.1%	11.3%	16.1%	20.5%	36.5%	33.5%	17.7%	14.2%
1990 Total Labor Force	45,526	63,257	155,591	15,341	41,520	21,137	74,975	6,598	423,945	1,338,578
2000 Total Labor Force	59,093	70,410	155,555	16,004	47,288	25,251	102,356	9,008	484,965	1,489,257
Percent Change	29.8%	11.3%	0.0%	4.3%	13.9%	19.5%	36.5%	36.5%	14.4%	11.3%

Source: 1990 and 2000 Census, Bureau of the Census.

pre-school) remained stable. In Beaufort and Charleston Counties, however, population growth rates exceeded labor force growth rates, and the counties' labor force participation rates declined from 1990 to 2000. The relatively slow growth in county labor force probably reflects (a) the large number of retirees attracted to these counties, and (b) the increasing importance of in-commuting from neighboring counties to work in the growing coastal counties.

Population Change in Coastal Census Tracts, 1990-2000

The 1990 and 2000 populations and numbers of households for the census tracts along the South Carolina coast are provided in Tables 5 and 6, respectively. The changes in county population and households in coastal and noncoastal census tracts are summarized in Tables 7 and 8 and Figure 3. For the coastal versus noncoastal comparisons we identified 46 coastal census tracts in the eight coastal counties. Coastal tracts for 1990 and 2000 were matched to ensure that the same areas were compared for the two census years. For example, Beaufort County 1990 tract numbers 13-20 were aggregated to match 2000 tract numbers 101-113. These tracts were grouped for each census year so that geographic area was constant from 1990 to 2000. In addition, some 1990 tracts were divided into two or more tracts by 2000 (as was the case in Georgetown County). In this case we compared one 1990 tract with multiple 2000 tracts. Tract maps are provided in Appendix II.

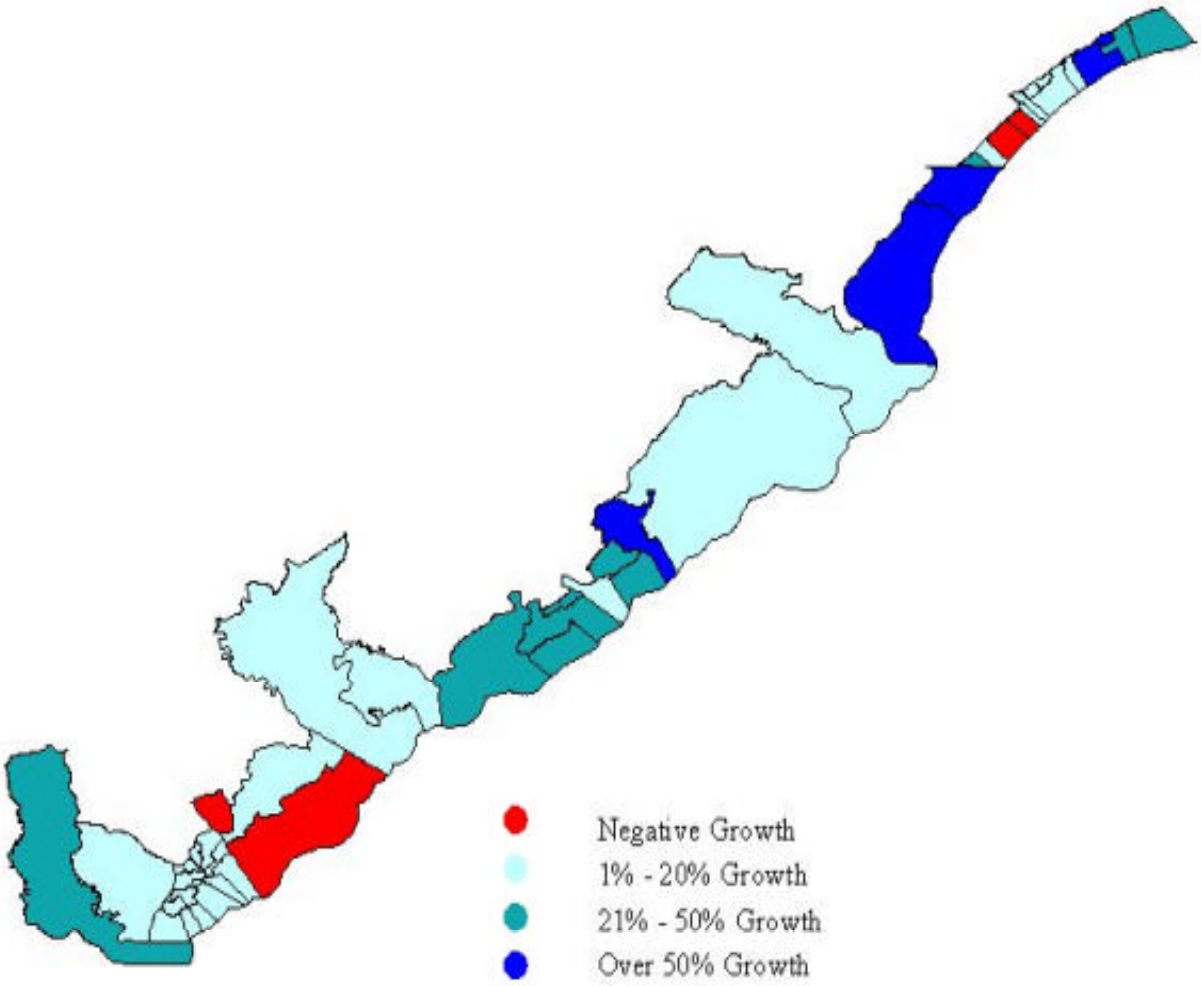
Population change in Beaufort, Charleston, and Georgetown counties was driven by growth in the counties' coastal areas. Specifically, population growth in coastal tracts accounted for 82.8% of population growth in Beaufort County and 78.4% of the growth in Georgetown County. In Charleston County, the coastal census tracts accounted for all

of the county's growth from 1990 to 2000. That is, the Charleston County coastal tracts added 17,166 new residents while the remainder of the county reported a population loss of 2,236 individuals. Interestingly enough, the noncoastal areas of Charleston County reported 8,274 net new households from 1990 to 2000 (Table 8). An increase in the number of households, accompanied by a decline in population, indicated that average household size declined significantly in the noncoastal tracts of Charleston County.

The smallest relative contribution to county population growth by coastal tracts was reported for Horry County. The Grand Strand's coastal tracts accounted for only 9.7% of the county's 1990-2000 population growth. The coastal areas relatively small role in county growth probably is attributable to the lack of developable land along the coast, thus new residential developments generally were located in the county's interior.

Finally, the population change in the coastal tracts in Colleton (292) and Jasper (611) counties was not large. In each of these two counties, however, only one census tract was classified as "coastal," thus references to growth in coastal tracts refer primarily to development in Beaufort, Charleston, Georgetown, and Horry Counties.

Figure 3. Coastal County Census Tracts , Population Growth, 1990-2000



Source: U.S. Census Bureau
Note: 2000 Beaufort County Tracts 101-113 and Georgetown County Tracts 9805.01 & 9805.02 were combined for comparison to 1990 data.

Table 5. South Carolina Coastal County and Census Tract Population Growth, 1990 to 2000

Census Tracts 2000	1990 Population	2000 Population	Percentage Growth in Population	Census Tracts 1990 Matched to Census Tracts 2000
Beaufort County	**86,425**	**120,937**	**39.9%**	
Coastal Census Tracts	**42,990**	**71,583**	**66.5%**	
Census Tract 9	5,046	9,321	84.7%	Census Tract 9
Census Tract 10	7,172	4,841	-32.5%	Census Tract 10
Census Tract 11	5,468	8,407	53.7%	Census Tract 11
Census Tract 12	1,111	1,079	-2.9%	Census Tract 12
Census Tracts 101-113[1]	19,085	33,689	76.5%	Census Tracts 13-20
Census Tract 21	5,108	14,246	178.9%	Census Tract 21
Charleston County	**295,039**	**309,969**	**5.1%**	
Coastal Census Tracts	**34,247**	**51,413**	**50.1%**	
Census Tract 20.03	4,574	5,773	26.2%	Census Tract 20.03
Census Tract 20.04	1,255	1,879	49.7%	Census Tract 20.04
Census Tract 20.05	3,940	5,340	35.5%	Census Tract 20.05[2]
Census Tract 21.02	4,194	5,574	32.9%	Census Tract 21.02
Census Tract 23	1,318	1,559	18.3%	Census Tract 23.98
Census Tract 46.01	2,316	10,375	348.0%	Census Tract 46.01
Census Tract 46.04	6,882	9,328	35.5%	Census Tract 46.04
Census Tract 48	1,623	1,911	17.7%	Census Tract 48
Census Tract 49	3,680	4,583	24.5%	Census Tract 49
Census Tract 50	4,465	5,091	14.0%	Census Tract 50
Colleton County	**34,377**	**38,264**	**11.3%**	
Coastal Census Tracts	**2,032**	**2,417**	**18.9%**	
Census Tract 9708	2,032	2,417	18.9%	Census Tract 9708

Table 5. (Cont.)

Census Tracts 2000	1990 Population	2000 Population	Percentage Growth in Population	Census Tracts 1990 Matched to Census Tracts 2000
Georgetown County	**46,302**	**55,797**	**20.5%**	
Coastal Census Tracts	**13,120**	**20,564**	**56.7%**	
Census Tracts 9805.01,9805.02	9,680	16,646	72.0%	Census Tract 9805
Census Tract 9808	3,440	3,918	13.9%	Census Tract 9808
Horry County	**144,053**	**196,629**	**36.5%**	
Coastal Census Tracts	**36,941**	**42,020**	**13.7%**	
Census Tract 402	2,555	3,428	34.2%	Census Tract 402
Census Tract 403	2,397	2,955	23.3%	Census Tract 403
Census Tract 404	2,951	3,417	15.8%	Census Tract 404
Census Tract 405	3,457	3,777	9.3%	Census Tract 405
Census Tract 502	867	1,475	70.1%	Census Tract 502
Census Tract 503	2,317	2,534	9.4%	Census Tract 503
Census Tract 504	4,058	4,328	6.7%	Census Tract 504
Census Tract 505	3,929	4,568	16.3%	Census Tract 505
Census Tract 506	3,482	3,705	6.4%	Census Tract 506
Census Tract 507	1,407	1,442	2.5%	Census Tract 507
Census Tract 508	953	920	-3.5%	Census Tract 508
Census Tract 511	1,200	948	-21.0%	Census Tract 511
Census Tract 512	3,754	4,127	9.9%	Census Tract 512
Census Tract 513	3,614	4,396	21.6%	Census Tract 513
Jasper County	**15,487**	**20,678**	**33.5%**	
Coastal Census Tracts	**4,948**	**6,555**	**32.5%**	
Census Tract 9503	4,948	6,555	32.5%	Census Tract 9503

Source: 1990 & 2000 Census, U.S. Bureau of the Census

Table 6. South Carolina Coastal County and Census Tract Households Growth, 1990 to 2000

Census Tracts 2000	1990 Households	2000 Households	Percentage Growth in Households	Census Tracts 1990 Matched to Census Tracts 2000
Beaufort County	**30,712**	**45,532**	**48.3%**	
Coastal Census Tracts	**6,623**	**13,446**	**103.0%**	
Census Tract 9	1,945	3,521	81.0%	Census Tract 9
Census Tract 10	327	318	-2.8%	Census Tract 10
Census Tract 11	1,957	3,211	64.1%	Census Tract 11
Census Tract 12	448	550	22.8%	Census Tract 12
Census Tracts 101-113	8,516	14,361	68.6%	Census Tracts 13-20
Census Tract 21	1,946	5,846	200.4%	Census Tract 21
Charleston County	**107,069**	**123,326**	**15.2%**	
Coastal Census Tracts	**12,152**	**20,135**	**65.7%**	
Census Tract 20.03	1,492	2,286	53.2%	Census Tract 20.03
Census Tract 20.04	584	927	58.7%	Census Tract 20.04
Census Tract 20.05	1,387	2,044	47.4%	Census Tract 20.05
Census Tract 21.02	1,513	2,328	53.9%	Census Tract 21.02
Census Tract 23	384	614	59.9%	Census Tract 23.98
Census Tract 46.01	691	3,636	426.2%	Census Tract 46.01
Census Tract 46.04	2,550	3,768	47.8%	Census Tract 46.04
Census Tract 48	643	797	24.0%	Census Tract 48
Census Tract 49	1,482	1,942	31.0%	Census Tract 49
Census Tract 50	1,426	1,793	25.7%	Census Tract 50
Colleton County	**12,040**	**14,470**	**20.2%**	
Coastal Census Tracts	710	1,002	41.1%	
Census Tract 9708	710	1,002	41.1%	Census Tract 9708

Table 6. (Cont.)

Census Tracts 2000	1990 Households	2000 Households	Percentage Growth in Households	Census Tracts 1990 Matched to Census Tracts 2000
Georgetown County	**16,275**	**21,659**	**33.1%**	
Coastal Census Tracts	**5,146**	**8,860**	**72.2%**	
Census Tracts 9805.01,9805.02	4,069	7,486	84.0%	Census Tract 9805
Census Tract 9808	1,077	1,374	27.6%	Census Tract 9808
Horry County	**55,764**	**81,800**	**46.7%**	
Coastal Census Tracts	**16,979**	**20,263**	**19.3%**	
Census Tract 402	1,052	1,484	41.1%	Census Tract 402
Census Tract 403	1,142	1,532	34.2%	Census Tract 403
Census Tract 404	1,410	1,731	22.8%	Census Tract 404
Census Tract 405	1,598	1,798	12.5%	Census Tract 405
Census Tract 502	419	805	92.1%	Census Tract 502
Census Tract 503	1,151	1,268	10.2%	Census Tract 503
Census Tract 504	1,928	2,128	10.4%	Census Tract 504
Census Tract 505	1,940	2,325	19.8%	Census Tract 505
Census Tract 506	1,344	1,486	10.6%	Census Tract 506
Census Tract 507	674	661	-1.9%	Census Tract 507
Census Tract 508	465	474	1.9%	Census Tract 508
Census Tract 511	597	494	-17.3%	Census Tract 511
Census Tract 512	1,624	1,986	22.3%	Census Tract 512
Census Tract 513	1,635	2,091	27.9%	Census Tract 513
Jasper County	**5,298**	**7,042**	**32.9%**	
Coastal Census Tracts	1,706	2,317	35.8%	
Census Tract 9503	1,706	2,317	35.8%	Census Tract 9503

Source: 1990 & 2000 Census, U.S. Bureau of the Census

Table 7. Change in Population, Coastal Tracts vs. Noncoastal Tracts, 1990-2000

County (Coastal/Total)[a]	Change in Population: Coastal Tracts	Change in Population: Noncoastal Tracts	Total
Beaufort	28,593	5,919	34,512
(17/27)	(82.8%)[c]	(17.2%)	
Berkeley[b]	No Coastal Tracts	13,875	13,875
Charleston	17,166	-2,236	14,930
(10/78)	(115.0%)	(-15.0%)	
Colleton	385	3,502	3,887
(1/8)	(9.9%)	(90.1%)	
Dorchester[b]	No Coastal Tracts	13,353	13,353
Georgetown	7,444	2,051	9,495
(3/10)	(78.4%)	(21.6%)	
Horry	5,079	47,497	52,576
(14/23)	(9.7%)	(90.3%)	
Jasper	1,607	3,584	5,191
(1/3)	(31.0%)	(69.0%)	
Total	60,274	87,545	147,819
(46/169)	(40.8%)	(59.2%)	

[a] The number of coastal tracts and total tracts in the county.

[b] Neither Berkeley or Dorchester counties have coastal tracts.

[c] Number in parentheses is the share of the county's total change in population.

Source: 1990 & 2000 Census, U.S. Bureau of the Census.

Table 8. Change in Households, Coastal Tracts vs. Noncoastal Tracts, 1990-2000

County (Coastal/Total)[a]	Change in Households: Coastal Tracts	Change in Households: Noncoastal Tracts	Total
Beaufort (17/27)	12,668 (85.5%)[c]	2,152 (14.5%)	14,280
Berkeley[b]	No Coastal Tracts	7,536	7,536
Charleston (10/78)	7,983 (49.1%)	8,274 (50.9%)	16,257
Colleton (1/8)	292 (12.0%)	2,138 (88.0%)	2,430
Dorchester[b]	No Coastal Tracts	6,496	6,496
Georgetown (3/10)	3,714 (69.0%)	1,670 (31.0%)	5,384
Horry (14/23)	3,284 (12.6%)	22,752 (87.4%)	26,036
Jasper (1/3)	611 (35.0%)	1,133 (65.0%)	1,744
Total (46/169)	28,522 (35.6%)	52,151 (64.4%)	80,703

[a] The number of coastal tracts and total tracts in the county.

[b] Neither Berkeley or Dorchester counties have coastal tracts.

[c] Number in parentheses is the share of the county's total change in households.

Source: 1990 & 2000 Census, U.S. Bureau of the Census.

Employment Change in Coastal Counties

Employment change by major industry divisions for coastal and noncoastal counties is presented in Table 9. Tables 9 (a) through 9 (h) provide the 1990 and 2000 employment data for the eight individual coastal counties. The totals for private civilian employment indicate that job growth in the coastal counties accounted for much of the state's overall civilian employment growth during the 1990s. Specifically, the eight coastal counties reported an increase of 134,158 private sector jobs while the remaining 40 counties experienced only 226,927 net new jobs. Thus approximately one out of every three net new civilian jobs was created in the eight coastal counties, and most of this coastal employment growth was the result of rapid job growth in Charleston and Horry counties. Employment change in Charleston and Horry was 85,833 or approximately 64% of total employment growth for the coastal counties.

The coastal counties' overall impact on state total employment growth (private sector plus government) was significantly dampened by large losses in federal and military employment since 1990. Government employment declined by 18,987 in the eight coastal counties while the thirty-eight noncoastal counties experienced a net increase of 41,323 government jobs. Most of the cutbacks in government employment were focused on Charleston and Horry counties. Charleston's employment in federal civilian and military jobs declined by 31,921 from 1990 to 2000, and Horry County federal civilian and military employment fell by over 4,000 over the same period.

Table 9. Employment Change for Coastal and Noncoastal South Carolina, 1990 - 2000

	Coastal Counties			Noncoastal Counties		
	1990	2000	Change	1990	2000	Change
Civilian:	**347,507**	**481,665**	**134,158**	**1,180,970**	**1,407,897**	**226,927**
Ag. services, forestry, fishing, mining, other	5,990	10,186	4,196	12,480	18,310	5,830
Construction	34,450	47,334	12,884	99,358	109,233	9,875
Manufacturing	37,661	38,498	837	351,853	313,701	-38,152
Transportation and public utilities	18,081	25,903	7,822	55,777	82,771	26,994
Wholesale trade	13,015	16,418	3,403	53,356	70,573	17,217
Retail trade	93,487	122,525	29,038	238,753	289,789	51,036
Finance, insurance, and real estate	31,264	43,437	12,173	77,881	99,170	21,289
Services	113,559	177,364	63,805	291,512	424,350	132,838
Government and government enterprises:	**125,321**	**106,334**	**-18,987**	**235,731**	**277,054**	**41,323**
Federal, civilian	23,098	11,887	-11,211	16,967	19,110	2,143
Military	50,653	26,490	-24,163	34,109	32,104	-2,005
State and local	51,570	67,957	16,387	184,655	225,840	41,185
Total Civilian and Government	**472,828**	**587,999**	**115,171**	**1,416,701**	**1,684,951**	**268,250**

Source: REIS, Bureau of Economic Analysis.

Table 9a. Employment Change in Beaufort County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**39,129**	**61,901**	**22,772**	**58.2%**
Ag. services, forestry, fishing, mining, other[1]	1,286	2,505	1,219	94.8%
Construction	3,985	7,654	3,669	92.1%
Manufacturing	1,387	1,203	-184	-13.3%
Transportation and public utilities	1,203	2,115	912	75.8%
Wholesale trade[2]	641	1266	625	97.5%
Retail trade	10,923	16,372	5,449	49.9%
Finance, insurance, and real estate	4,981	7,790	2,809	56.4%
Services	14,723	22,996	8,273	56.2%
Government and government enterprises:	**17,449**	**20,282**	**2,833**	**16.2%**
Federal, civilian	1,765	2,293	528	29.9%
Military	11,360	11,680	320	2.8%
State and local	4,324	6,309	1,985	45.9%
Total Civilian and Government	**56,578**	**82,183**	**25,605**	**45.3%**

[1] Mining value was undisclosed. 1990 value was used.

[2] Wholesale Trade value was undisclosed. Value represents difference between total and remaining categories.

Source: REIS, Bureau of Economic Analysis.

Table 9b. Employment Change in Berkeley County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**26,593**	**36,467**	**9,874**	**37.1%**
Ag. services, forestry, fishing, mining, other[1]	361	611	250	69.3%
Construction	3,968	5,048	1,080	27.2%
Manufacturing	7,089	7,908	819	11.6%
Transportation and public utilities	1,538	3,081	1,543	100.3%
Wholesale trade	638	1,184	546	85.6%
Retail trade	5,781	7,808	2,027	35.1%
Finance, insurance, and real estate	1,204	1,827	623	51.7%
Services	6,014	9,000	2,986	49.7%
Government and government enterprises:	**6,775**	**7,885**	**1,110**	**16.4%**
Federal, civilian	342	415	73	21.3%
Military	946	751	-195	-20.6%
State and local	5,487	6,719	1,232	22.5%
Total Civilian and Government	**33,368**	**44,352**	**10,984**	**32.9%**

[1] Ag. and Mining values were undisclosed. Value represents difference between total and remaining categories.

Source: REIS, Bureau of Economic Analysis.

Table 9c. Employment Change in Charleston County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**151,556**	**195,322**	**43,766**	**28.9%**
Ag. services, forestry, fishing, mining, other	2,236	3,238	1,002	44.8%
Construction	14,943	15,923	980	6.6%
Manufacturing	10,150	10,622	472	4.7%
Transportation and public utilities	11,020	13,508	2,488	22.6%
Wholesale trade	7,871	8,345	474	6.0%
Retail trade	38,140	45,226	7,086	18.6%
Finance, insurance, and real estate	13,727	16,514	2,787	20.3%
Services	53,469	81,946	28,477	53.3%
Government and government enterprises:	**77,551**	**52,400**	**-25,151**	**-32.4%**
Federal, civilian	19,228	7,963	-11,265	-58.6%
Military	32,696	12,040	-20,656	-63.2%
State and local	25,627	32,397	6,770	26.4%
Total Civilian and Government	**229,107**	**247,722**	**18,615**	**8.1%**

Source: REIS, Bureau of Economic Analysis.

Table 9d. Employment Change in Colleton County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**11,595**	**12,498**	**903**	**7.8%**
Ag. services, forestry, fishing, mining, other[1]	282	288	6	2.1%
Construction	1,023	1,421	398	38.9%
Manufacturing	2,602	2,102	-500	-19.2%
Transportation and public utilities	506	668	162	32.0%
Wholesale trade	628	754	126	20.1%
Retail trade	2,731	2,734	3	0.1%
Finance, insurance, and real estate	871	752	-119	-13.7%
Services	2,952	3,779	827	28.0%
Government and government enterprises:	**2,028**	**2,546**	**518**	**25.5%**
Federal, civilian	112	129	17	15.2%
Military	249	197	-52	-20.9%
State and local	1,667	2,220	553	33.2%
Total Civilian and Government	**13,623**	**15,044**	**1,421**	**10.4%**

[1] Ag. and Mining values were undisclosed. Value represents difference between total and remaining categories.

Source: REIS, Bureau of Economic Analysis.

Table 9e. Employment Change in Dorchester County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**22,535**	**29,161**	**6,626**	**29.4%**
Ag. services, forestry, fishing, mining, other	556	1,047	491	88.3%
Construction	2,228	2,988	760	34.1%
Manufacturing	5,115	5,046	-69	-1.3%
Transportation and public utilities	751	1,856	1,105	147.1%
Wholesale trade	817	1,214	397	48.6%
Retail trade	5,804	7,125	1,321	22.8%
Finance, insurance, and real estate	1,164	1,383	219	18.8%
Services	6,100	8,502	2,402	39.4%
Government and government enterprises:	**4,488**	**5,401**	**913**	**20.3%**
Federal, civilian	195	209	14	7.2%
Military	604	474	-130	-21.5%
State and local	3,689	4,718	1,029	27.9%
Total Civilian and Government	**27,023**	**34,562**	**7,539**	**27.9%**

Source: REIS, Bureau of Economic Analysis.

Table 9f. Employment Change in Georgetown County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**18,507**	**25,378**	**6,871**	**37.1%**
Ag. services, forestry, fishing, mining, other[1]	445	775	330	74.2%
Construction	1,851	2,289	438	23.7%
Manufacturing	4,797	3,747	-1,050	-21.9%
Transportation and public utilities	707	749	42	5.9%
Wholesale trade	446	606	160	35.9%
Retail trade	4,403	6,459	2,056	46.7%
Finance, insurance, and real estate	1,422	2,325	903	63.5%
Services	4,436	8,428	3,992	90.0%
Government and government enterprises:	**3,663**	**4,376**	**713**	**19.5%**
Federal, civilian	106	158	52	49.1%
Military	374	322	-52	-13.9%
State and local	3,183	3,896	713	22.4%
Total Civilian and Government	**22,170**	**29,754**	**7,584**	**34.2%**

[1] Ag. and Mining values were undisclosed. Value represents difference between total and remaining categories.

Source: REIS, Bureau of Economic Analysis.

Table 9g. Employment Change in Horry County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**73,579**	**115,646**	**42,067**	**57.2%**
Ag. services, forestry, fishing, mining, other	704	1,524	820	116.5%
Construction	5,979	11,009	5,030	84.1%
Manufacturing	6,123	7,363	1,240	20.3%
Transportation and public utilities	2,113	3,661	1,548	73.3%
Wholesale trade	1,827	2,837	1,010	55.3%
Retail trade	24,724	35,697	10,973	44.4%
Finance, insurance, and real estate	7,664	12,594	4,930	64.3%
Services	24,445	40,961	16,516	67.6%
Government and government enterprises:	**12,317**	**11,911**	**-406**	**-3.3%**
Federal, civilian	1,300	668	-632	-48.6%
Military	4,312	936	-3,376	-78.3%
State and local	6,705	10,307	3,602	53.7%
Total Civilian and Government	**85,896**	**127,557**	**41,661**	**48.5%**

Source: REIS, Bureau of Economic Analysis.

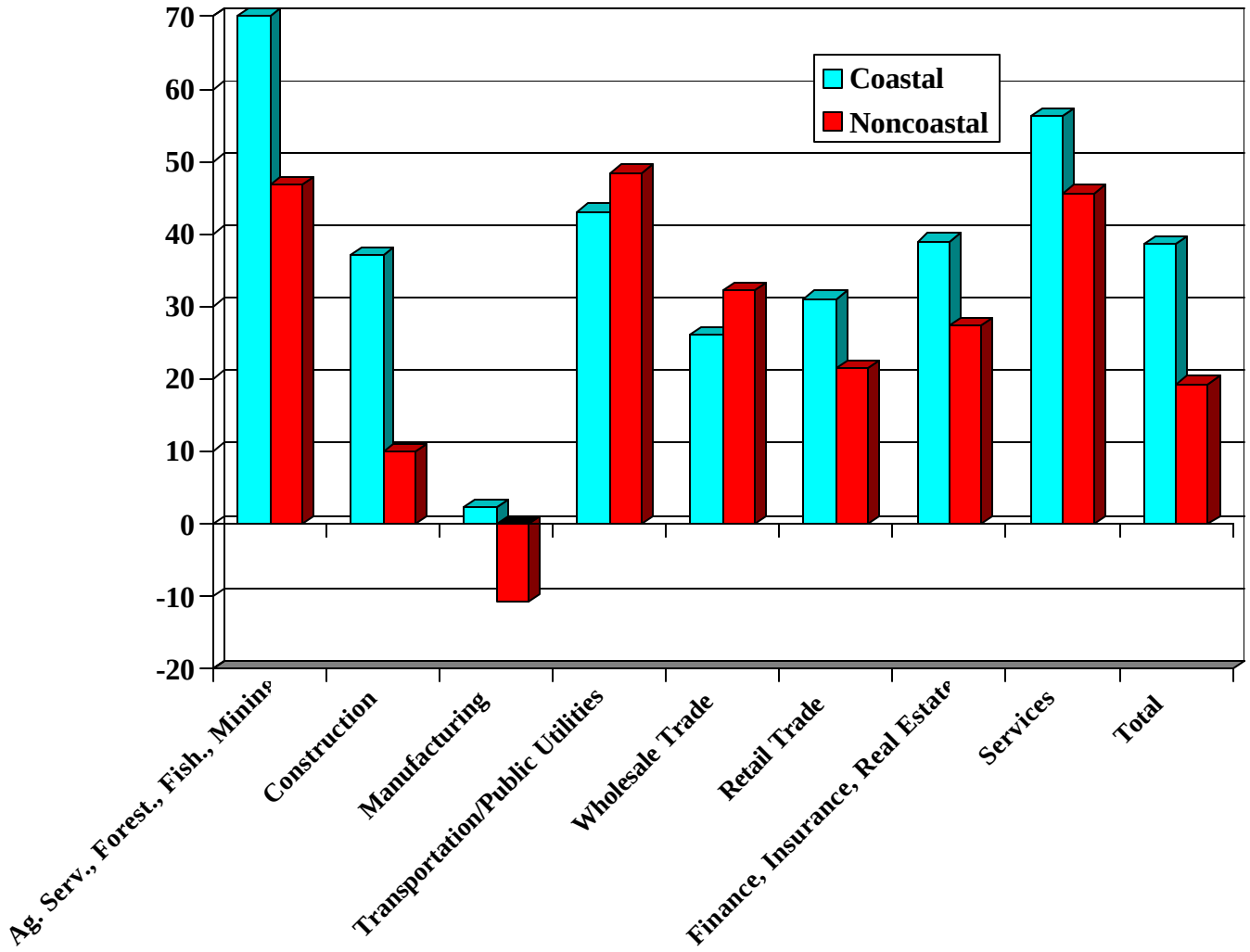
Table 9h. Employment Change in Jasper County, 1990 - 2000

	1990	2000	Change	Percent Change
Civilian:	**4,013**	**5,292**	**1,279**	**31.9%**
Ag. services, forestry, fishing, mining, other[1]	120	198	78	65.0%
Construction	473	1,002	529	111.8%
Manufacturing	398	507	109	27.4%
Transportation and public utilities	243	265	22	9.1%
Wholesale trade	147	212	65	44.2%
Retail trade	981	1,104	123	12.5%
Finance, insurance, and real estate	231	252	21	9.1%
Services	1,420	1,752	332	23.4%
Government and government enterprises:	**1,050**	**1,533**	**483**	**46.0%**
Federal, civilian	50	52	2	4.0%
Military	112	90	-22	-19.6%
State and local	888	1,391	503	56.6%
Total Civilian and Government	**5,063**	**6,825**	**1,762**	**34.8%**

[1] Ag. and Mining values were undisclosed. Value represents difference between total and remaining categories.

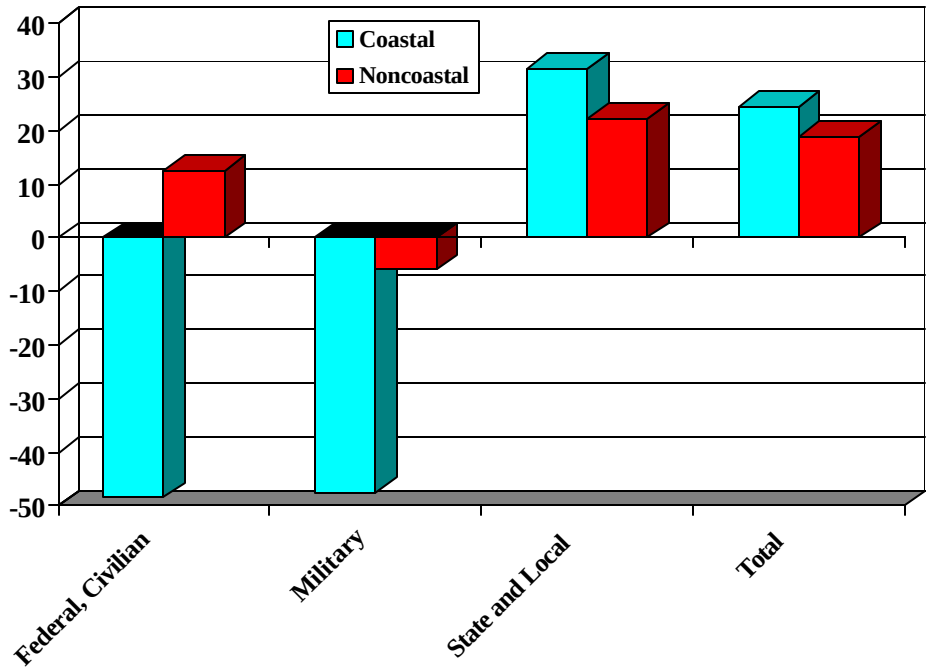
Source: REIS, Bureau of Economic Analysis.

Figure 4. Percentage Civilian Employment Change by Major Industry Division, Coastal versus Noncoastal Counties, 1990-2000



Source: REIS, Bureau of Economic Analysis

Figure 5. Percentage Government Employment Change by Government Entity, Coastal versus Noncoastal Counties, 1990-2000



Source: REIS, Bureau of Economic Analysis

Shift-Share Analysis of Employment Change

Shift-share analysis is a methodology for disaggregating a region's employment growth into three components: national growth, industry mix, and competitive shift. The *national growth component* is the change in industry employment if the region's industry grew at the national employment growth rate (20.6% for the U.S. from 1990 to 2000). The *industry mix component* is the employment change in a region attributable to the region's allocation of jobs among fast- and slow-growing industries. The mix component for an individual industry (e.g., Services) will be positive if that industry had more rapid growth than the overall national average. Alternatively, a negative industry mix value results if the industry's employment growth rate lagged the overall national employment

The net impact of expanding civilian and declining government jobs was employment growth in the coastal counties of 24.4% compared to an employment increase of 18.9% for the noncoastal counties. Relatively rapid employment growth along the coast also resulted in a small increase in the share of the state's total employment in the eight coastal counties. In 1990, the coast had 25.0% of the state's jobs, and by 2000 the coastal counties' share had increased to almost 26.0%.

Industry Employment Change

The 1990 to 2000 growth rates of employment by major industry divisions are summarized in Figures 4 and 5. Percentage employment change in the coastal counties exceeded that of the rest of the state for every civilian industry division except Wholesale Trade and Transportation/Public Utilities. Coastal employment growth rates were highest in Services (56.1%); Finance, Insurance, and Real Estate (38.9%); and Construction (37.4%). The Services and Retail Trade sectors generated the most new employment opportunities in the coastal counties with retail trade employment growing by 29,038 and services expanding by 63,805 jobs. Manufacturing, on the other hand, added only 837 net new jobs to the coastal economy from 1990 to 2000; however, manufacturing in the rest of the state declined by 10.8% or 38,152 jobs. Employment in state and local government also was a significant contributor to coastal county employment growth. State and local government enterprises added 16,387 net new jobs in the eight coastal counties for a 1990-2000 growth rate of 31.8%. State and local government employment in noncoastal counties grew by only 22.3%. The more rapid growth in the coastal counties reflects the rapid increase in population and households and the resulting increased demand for public services.

growth rate. The sum of the mix components for a region's industry divisions provides an overall measure of the employment generation potential of the region's industrial base. For example, a positive industry mix value for the region indicates that region had a disproportionately large share of rapidly growing industries relative to the nation.

The *competitive shift component* is the change in regional employment after accounting for national employment growth and industry mix. A positive shift value reflects more jobs in the region than can be explained by industry mix and national growth trends. In other words, the region is said to exhibit a "competitive advantage" if the region is attracting more than "its share" of the nation's employment for that sector. A negative shift component value reflects a "competitive disadvantage" for the region.

The estimated values for the three components of employment change were calculated as follows:

(1) National Growth Component for Industry i, Region j

$$NGC_{ij} = E_{ij}^{t-1}\left(\frac{E_n^t}{E_n^{t-1}}\right) - E_{ij}^{t-1}$$

(2) Industry Mix Component for Industry i, Region j

$$IMC_{ij} = \left[E_{ij}^{t-1}\left(\frac{E_{in}^t}{E_{in}^{t-1}}\right) - E_{ij}^{t-1}\right] - NGC_{ij}$$

(3) Competitive Shift Component for Industry *i*, Region *j*

$$CSC_{ij} = \left(E_{ij}^t - E_{ij}^{t-1}\right) - NCG_{ij} - IMC_{ij}$$

where E = employment
i = industry
j = region
n = nation
t = 2000
t-1 = 1990

The results of the shift-share analysis for the coastal and noncoastal counties are presented in Tables 10 and 11, respectively. Of special interest are the last columns in each table-- the employment "shift" or employment change above that attributable to just matching overall national growth trends. The coastal counties had positive "competitive shift" values for all civilian industrial sectors, indicating that coastal employment growth in every major industrial division was stronger than the national average for that division. Especially impressive was the growth of employment in Services in the coastal counties. The South Carolina coast would have added 42,734 (23,393 + 19,341) new service jobs from 1990 to 2000 if service employment in the coastal counties mirrored national trends. However, service employment growth was 63,805 or 21,071 jobs above the employment change predicted based on national and industry trends. A large, positive shift component for an industry indicates that the region has a strong competitive advantage in attracting or stimulating employment in that sector relative to the nation as a whole.

The noncoastal counties of the state exhibited positive "competitive shift" values for all major employment divisions except Construction (-24,194) and Manufacturing (-27,242). These findings show that the noncoastal counties would have had over 51,000 more jobs in construction and manufacturing if the region had just matched national employment trends. Retrenchment of the textile and apparel industries in the face of increasing international competition contributed significantly to the negative employment shift in manufacturing in the noncoastal counties.

Table 10. Shift Share Analysis for Coastal Counties Employment, 1990 - 2000

Employment	1990	2000	Change	National Growth Component	Industry Mix	Shift
Civilian:	**347,507**	**481,665**	**134,158**			
Ag. Serv., forestry, fishing, mining	5,990	10,186	4,196	1,234	-118	3,080
Construction	34,450	47,334	12,884	7,097	4,022	1,765
Manufacturing	37,661	38,498	837	7,758	-8,887	1,966
Transportation and public utilities	18,081	25,903	7,822	3,725	896	3,202
Wholesale trade	13,015	16,418	3,403	2,681	-987	1,709
Retail trade	93,487	122,525	29,038	19,258	-1,216	10,995
Finance, insurance, and real estate	31,264	43,437	12,173	6,440	1,680	4,052
Services	113,559	177,364	63,805	23,393	19,341	21,071
Government/gov. enterprises:	**125,321**	**106,334**	**-18,987**			
Federal, civilian	23,098	11,887	-11,211	4,758	-7,202	-8,768
Military	50,653	26,490	-24,163	10,435	-22,418	-12,180
State and local	51,570	67,957	16,387	10,623	-2,065	7,829
Total	**472,828**	**587,999**	**115,171**	**97,403**	**-16,953**	**34,721**

Source: REIS 1960-2000. U.S. Department of Commerce, Bureau of Economic Analysis.
Note: In 2000, Berkeley, Colleton, Georgetown, and Jasper Counties had missing data for Ag. Services & Mining sectors due to disclosure. Ag. Services and Mining sectors were combined for this worksheet. In doing so, the employment figure was calculated as the difference between the total civilian employment figure and the remaining sectors. Beaufort County had missing data for the Mining and Wholesale Trade Sectors. The Mining employment figure for 1990 was also used for 2000 and Wholesale Trade Sector employment was calculated as the difference between the total civilian employment and the remaining sectors.

Table 11. Shift Share Analysis for Noncoastal Counties Employment, 1990-2000

Employment	1990	2000	Change	National Growth Component	Industry Mix	Shift
Civilian:	**1,180,970**	**1,407,897**	**226,927**			
Ag. Serv., forestry, fishing, mining	12,480	18,310	5,830	2,571	-63	3,322
Construction	99,358	109,233	9,875	20,468	13,601	-24,194
Manufacturing	351,853	313,701	-38,152	72,482	-83,392	-27,242
Transportation and public utilities	55,777	82,771	26,994	11,490	3,348	12,156
Wholesale trade	53,356	70,573	17,217	10,991	-3,858	10,084
Retail trade	238,753	289,789	51,036	49,183	-868	2,721
Finance, insurance, and real estate	77,881	99,170	21,289	16,043	4,801	445
Services	291,512	424,350	132,838	60,051	54,209	18,578
Government/gov. enterprises:	**235,731**	**277,054**	**41,323**			
Federal, civilian	16,967	19,110	2,143	3,495	-5,347	3,995
Military	34,109	32,104	-2,005	7,026	-15,462	6,431
State and local	184,655	225,840	41,185	38,039	-5,872	9,018
Total	**1,416,701**	**1,684,951**	**268,250**	**291,840**	**-38,904**	**15,314**

Source: REIS 1960-2000. U.S. Department of Commerce, Bureau of Economic Analysis.
Note: In 2000, Berkeley, Colleton, Georgetown, and Jasper Counties had missing data for Ag. Services & Mining sectors due to disclosure. Ag. Services and Mining sectors were combined for this worksheet. In doing so, the employment figure was calculated as the difference between the total civilian employment figure and the remaining sectors. Beaufort County had missing data for the Mining and Wholesale Trade Sectors. The Mining employment figure for 1990 was also used for 2000 and Wholesale Trade Sector employment was calculated as the difference between the total civilian employment and the remaining sectors.

A finding of special interest from the shift-share analysis is the total increase in state employment resulting from the competitive shift and the percentage of this shift attributed to the eight coastal counties. From 1990 to 2000, over 51,000 of the net new jobs (34,721 + 15,314) created in the state were the result of employment growth above that attributable to industrial composition and national expansion. Of these 51,000 new jobs, 34,721 or 68.1% were located in the eight counties along the coast. Thus, the state's coastal economy was responsible for more than two out of every three jobs that the state attracted because of its competitive advantage relative to other states.

Income Growth in Counties

The relatively rapid growth in population and employment in the coastal counties is reflected in the levels and growth of income in the counties (Table 12). First, nominal income in the coastal counties grew more rapidly (86.7%) than in the rest of the state (80.1%). Total nominal incomes in Beaufort (133.4%), Georgetown (115.3%), Horry (119.9%), and Jasper (136.8%) more than doubled from 1990 to 2000. Second, and more importantly from an economic development perspective, the 2000 per capita income of the coastal region ($20,189) was higher than the level for noncoastal counties ($18,344). More impressive, however, is the fact that seven coastal counties, led by Georgetown (78.7%) and Jasper (77.4%), counties, had 1990 to 2000 growth rates in per capita income that exceeded the noncoastal growth rate (56.1%). Only Berkeley county, with a per capita income growth rate of 54.3%, lagged the growth rate for the noncoastal counties. The rapid growth of per capita incomes in coastal counties relative to the rest of the state contributed to a widening income gap between the coastal and noncoastal economies. In 1990, the ratio of coastal to noncoastal per capita income was 1.08, but by

2000 this ratio had increased to 1.10. The 1990s were a period of divergence between the incomes of the top and bottom income classes in the United States, a divergence that is reflected in the spatial distributions of per capita incomes in South Carolina.

Impacts of Coastal Tract Resident Income on the Coastal Region

Another perspective on the contribution that the coast makes to the economy is the effect that consumer spending by residents of coastal tracts has on the regional economy. These consumer related economic impacts on the region are part of the totals previously reported in Table 1 and 2. Total resident income in coastal tracts was about $5.2 billion in 2000 (about 4.95 billion in 1998 dollars) while other residents in the coastal counties accounted for about $12.6 billion in income (see Table 13).

Overall, the residents of coastal tracts accounted for 29% of total income in the eight counties. And in the highest income group, households with more than $75,000 in income, the coastal tracts made up 36% of all coastal region income. With the exception of the lowest income group, coastal tract households with incomes between $10,000 and $75,000 received from 19% to 24% of coastal region income in those income groups. Residents in coastal tracts received about 29% of the income going to the region's households with less than $10,000 in annual income.

This coastal tract income of $5.2 billion is allocated to eight levels of household income in Table 13. Using IMPLAN consumer spending profiles in the coastal SAM, we constructed estimates of consumer spending, *in the coastal counties*, that is associated with this coastal income. After converting the income to 1998 prices to conform with the IMPLAN database, as shown in Table 14, when taxes, savings, and out-of region imports were deleted from total income, $1.95 billion in local consumption remains. This

Table 12. Growth in Income, Coastal Counties and Rest of South Carolina, 1990 – 2000

	Beaufort County	Berkeley County	Charleston County	Colleton County	Dorchester County	Georgetown County	Horry County	Jasper County	All Coastal Counties	Rest of SC
1990 Per Capita Income*	$15,213	$10,942	$13,068	$9,193	$11,884	$11,084	$12,385	$7,984	$12,734	$11,751
2000 Per Capita Income*	$25,377	$16,879	$21,393	$14,831	$18,840	$19,805	$19,949	$14,161	$20,189	$18,344
Percent Change	66.8%	54.3%	63.7%	61.3%	58.5%	78.7%	61.1%	77.4%	58.5%	56.1%
1990 Total Income ($1,000)	$1,314,784	$1,560,887	$3,855,570	$316,028	$1,145,772	$513,211	$1,784,096	$123,648	$10,613,996	$30,867,309
2000 Total Income ($1,000)	$3,069,018	$2,407,806	$6,631,167	$567,493	$1,816,421	$1,105,060	$3,922,552	$292,821	$19,812,338	$55,593,428
Percent Change	133.4%	54.3%	72.0%	79.6%	58.5%	115.3%	119.9%	136.8%	86.7%	80.1%

* For all coastal counties column, per capita income computed by dividing total all coastal counties income by total coastal counties population.
Source: 1990 and 2000 Census, U.S. Census Bureau

Table 13. Resident Personal Income in Coastal Counties by Level of Income, 2000

	<$10K	$10K-20K	$20K-$25K	$25K-$30K	$30K-$40K	$40K-$50K	$50K-$75K	GT$75K	Sum
South Carolina	967,962,193	3,436,218,659	2,681,474,718	3,188,177,582	7,541,403,526	8,186,955,717	18,903,714,230	30,499,858,915	75,405,765,540
Berkeley County	23,845,332	97,252,577	82,394,980	100,848,717	263,725,614	305,909,690	674,074,933	859,754,387	2,407,806,229
Dorchester County	14,453,119	61,121,955	53,520,494	64,759,797	159,410,920	198,850,611	504,364,723	759,939,301	1,816,420,920
Beaufort County	17,904,154	79,846,384	65,903,553	91,716,133	224,049,329	265,499,606	661,395,826	1,662,703,265	3,069,018,249
Coastal Tracts Total	9,955,499	48,339,988	37,915,982	57,917,178	146,566,899	158,377,353	437,041,431	1,241,362,013	2,137,476,343
Noncoastal Tracts	7,948,655	31,506,396	27,987,570	33,798,955	77,482,429	107,122,253	224,354,394	421,341,252	931,541,906
Charleston County	83,787,439	270,872,447	209,386,965	257,803,109	580,041,349	590,471,242	1,496,163,062	3,142,641,204	6,631,166,817
Coastal Tracts Total	7,389,164	32,021,376	25,764,381	28,215,261	83,705,789	90,801,005	303,105,736	931,516,875	1,502,519,586
Noncoastal Tracts	76,398,275	238,851,071	183,622,584	229,587,848	496,335,560	499,670,236	1,193,057,327	2,211,124,329	5,128,647,231
Colleton County	13,368,432	40,266,904	27,181,949	31,794,402	68,447,644	81,196,137	150,438,574	154,799,343	567,493,384
Coastal Tracts Total	943,521	2,795,500	1,635,224	2,594,683	6,164,762	4,978,986	13,480,237	29,166,273	61,759,184
Noncoastal Tracts	12,424,911	37,471,405	25,546,725	29,199,719	62,282,882	76,217,151	136,958,337	125,633,070	505,734,200
Georgetown County	38,306,443	60,657,145	21,844,170	28,239,130	40,712,468	8,864,301	141,643,131	470,780,130	811,046,919
Coastal Tracts Total	17,531,176	23,236,821	7,303,034	15,117,895	22,622,276	6,371,592	75,094,211	310,749,041	478,026,045
Noncoastal Tracts	20,775,268	37,420,324	14,541,137	13,121,235	18,090,192	2,492,709	66,548,920	160,031,089	333,020,874
Horry County	152,592,886	226,565,660	70,351,057	95,478,724	125,093,475	25,223,819	578,287,784	1,394,812,431	2,668,405,837
Coastal Tracts Total	56,799,123	78,267,493	26,056,728	39,226,836	59,903,320	18,312,010	154,098,227	487,807,501	920,471,238
Noncoastal Tracts	95,793,763	148,298,168	44,294,329	56,251,888	65,190,155	6,911,809	424,189,557	907,004,930	1,747,934,599
Jasper County	8,456,575	11,843,877	4,742,223	6,377,472	3,737,713	794,264	45,648,072	93,307,809	174,908,005
Coastal Tracts Total	3,238,578	4,655,456	1,191,977	1,057,036	1,146,996	247,391	15,049,488	40,357,067	66,943,989
Noncoastal Tracts	5,217,997	7,188,421	3,550,246	5,320,436	2,590,716	546,873	30,598,584	52,950,742	107,964,016
All Coastal Tracts	95,857,060	189,316,633	99,867,325	144,128,889	320,110,042	279,088,337	997,869,331	3,040,958,769	5,167,196,385
Noncoastal Tracts	236,082,053	621,689,993	420,916,929	519,767,361	1,127,018,276	1,195,228,623	3,187,597,854	5,337,748,011	12,646,049,100
Coast Totals	331,939,113	811,006,626	520,784,254	663,896,250	1,447,128,319	1,474,316,960	4,185,467,185	8,378,706,780	17,813,245,486
Coastal Tract %	28.9%	23.3%	19.2%	21.7%	22.1%	18.9%	23.8%	36.3%	29.0%

Source: 2000 Census, U.S. Census Bureau

consumer spending was allocated to ten major industry groups in the region with Services ($522 million), Trade margins ($491 million) and Finance, Insurance and Real Estate, FIRE($477 million) the three leading sector destinations for consumer spending.

Using the SAM multiplier matrix for the coastal region economy, we find that the gross sales impact of the consumer spending was about $3.3 billion. The value added impact was about $2 billion while resident income of $1.2 billion can be attributed to spending by residents of coastal tracts in South Carolina (see Table 14).

Table 14. Coastal Economic Activity From Consumer Spending by Residents of Coastal Tracts

	Consumer Spending by Coastal Tract Residents, 2000	**Coastal Region Impacts**	
Industry	(excludes HH interest)		
Agriculture	$2,964,254	$8,190,330	
Mining	$109,082	$3,119,482	
Construction	$0	$50,967,677	
Manufacturing	$245,685,460	$456,886,850	
TCPU	$149,996,711	$294,275,987	
Trade	$491,110,077	$706,410,558	
FIRE	$476,638,723	$750,655,213	
Services	$521,629,568	$898,825,364	
Government	$50,103,165	$99,415,569	**Total Gross**
Other	$14,278,816	$20,840,134	**Sales Impact**
			$3,289,587,164
Value Added			
Employee comp		$1,017,406,203	
Proprietors income		$134,814,437	
Other property income		$668,876,590	**Total Value**
Indirect Business tax		$211,353,852	**Added Impact**
			$2,032,451,081
Resident Income			
Less than $5,000		$4,680,766	
$5,000-$10,000		$9,118,297	
$10,000 - $15,000		$27,782,091	
$15,000-$20,000		$48,392,770	
$20,000-$30,000		$153,009,841	
$30,000-$40,000		$183,456,057	
$40,000-$50,000		$172,314,752	**Total Region**
$50,000-$70,000		$276,574,932	**Income Effect**
Greater than $70,000		$327,128,216	**$1,202,457,723**

Source: Micro Implan Group 2000

V. Summary: The Coast's Contribution to the State's Economy

The South Carolina coast consists of only eight counties versus 38 counties for the remainder of the state, yet from 1990 to 2000, these eight counties were responsible for approximately one-fourth of the state's growth in population (28.1%), households (29.3%), labor force (28.8%), employment (20.1%), and income (27.1%) as shown in Table 15. The growth in population along the coast was concentrated in Horry and Beaufort counties while Horry led growth in employment, with Beaufort, Charleston, and Berkeley counties providing significant contributions. The coastal counties of Colleton and Jasper experienced relatively rapid growth in the five measures of economic activity, but their overall contribution to coastal and state growth was minor.

The Services; Trade; and Finance, Insurance, and Real Estate sectors - each of which is a fast growth sector nationally and at the state level - have led this growth. Service employment growth was about 30% above the employment change predicted based on national and industry trends -- indicating that the region has a strong competitive advantage in services relative to the nation as a whole.

Coastal output made up 31% of state output in Finance-Insurance-Real Estate (FIRE), 28.5% of state output of Services, and 25.3% of Trade output. One in four state jobs in Services, Trade and FIRE were in the eight coastal counties. Nearly 30% of state value added in these industries was generated along the coast. In contrast, the coast was a relatively small contributor to state Manufacturing employment – about 11%.

Importantly from an economic development perspective, the 2000 per capita income of the coastal region ($20,189) was higher than the level for noncoastal counties ($18,344). Total resident income in coastal tracts alone was about $5.2 billion in 2000.

Other residents in the coastal region have accounted for about $12.6 billion in income. Overall, the residents of coastal tracts accounted for 41% of total income in the eight counties. And in the highest income group, households with more than $75,000 in income, the coastal tracts made up 36% of all coastal region income.

Finally, nearly one in ten new, South Carolina residents over the 1990s were attracted to Horry County, alone; Beaufort garnered another 7% of the new S.C. residents. While Charleston's loss of the naval base slowed its population growth, income grew impressively. Together, these "big three" coastal counties continue to drive the coastal economy. Economic and demographic trends suggest that they will continue to expand steadily over the next decade and propel the coastal region to an increasing share of state economic activity.

Table 15. Coastal Share of State Change in Population, Households, Labor Force, Employment, and Income, 1990-2000

	Beaufort County	Berkeley County	Charleston County	Colleton County	Dorchester County	Georgetown County	Horry County	Jasper County	All Coastal Counties
Share of S.C. Growth									
Population	6.6%	2.6%	2.8%	0.7%	2.5%	1.8%	10.0%	1.0%	28.1%
Households	5.4%	2.7%	5.9%	0.9%	2.4%	2.0%	9.4%	0.6%	29.3%
Total Labor Force	6.4%	3.4%	0.0%	0.3%	2.7%	1.9%	12.9%	1.1%	28.8%
Employment	6.7%	2.9%	4.9%	0.4%	2.0%	2.0%	10.9%	0.5%	20.1%
Income[1]	5.2%	2.5%	8.2%	0.7%	1.6%	1.7%	6.3%	0.5%	27.1%

[1]Share of Total Income (Per Capita Income*Total Population)

Source: 1990 and 2000 Census, U.S. Census Bureau

APPENDIX I & II

Appendix I. Output, Value Added and Employment for South Carolina Coast and Coastal Counties

Base Year: 1998 SC COAST

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	708.142	11,975	87.838	59.223	195.452	46.109	388.622
Mining	40.693	326	9.464	(0.049)	6.409	1.083	16.907
Construction	4,747.747	49,917	1,193.985	257.502	142.574	34.559	1,628.620
Manufacturing	7,904.320	39,057	1,510.002	49.677	663.072	71.650	2,294.401
TCPU	2,507.193	20,802	643.203	49.454	508.170	112.144	1,312.971
Trade	5,648.411	133,955	2,373.957	162.931	800.061	746.872	4,083.821
FIRE	6,141.845	37,348	654.120	263.773	2,863.281	636.169	4,417.344
Services	7,327.622	156,993	3,134.692	583.221	651.569	185.149	4,554.631
Government	5,256.428	103,997	3,723.913	0.000	1,155.161	0.000	4,879.073
Other	176.097	6,629	57.966	0.000	118.131	0.000	176.097
Totals	40,458.497	560,998	13,389.140	1,425.733	7,103.879	1,833.736	23,752.488

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 BEAUFORT COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	64.787	2,045	21.503	6.720	12.175	1.602	41.999
Mining	0.000	0	0.000	0.000	0.000	0.000	0.000
Construction	722.510	7,333	196.317	36.962	22.931	5.566	261.776
Manufacturing	300.467	1,741	75.501	1.672	45.810	2.943	125.926
TCPU	296.948	2,139	73.541	5.069	82.265	17.611	178.485
Trade	684.844	16,416	292.176	19.092	94.879	87.668	493.815
FIRE	1,200.212	6,654	92.965	51.950	589.309	136.512	870.735
Services	965.734	19,427	438.605	59.746	91.781	27.370	617.502
Government	1,259.558	20,041	779.124	0.000	417.984	0.000	1,197.108
Other	30.923	1,378	13.426	0.000	17.497	0.000	30.923
Totals	5,525.982	77,172	1,983.156	181.211	1,374.631	279.271	3,818.269

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 BERKELEY COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	70.944	920	3.552	6.198	23.794	6.147	39.690
Mining	2.028	16	0.624	0.004	0.664	0.063	1.356
Construction	611.321	6,221	168.595	27.919	19.328	4.697	220.538
Manufacturing	1,904.430	7,828	367.771	20.776	112.254	20.252	521.053
TCPU	187.876	1,603	49.090	4.732	44.977	10.148	108.947
Trade	322.732	8,243	135.596	10.809	46.017	43.376	235.798
FIRE	222.557	1,321	16.776	9.611	113.640	24.071	164.097
Services	316.051	8,272	119.959	29.651	28.407	7.615	185.632
Government	293.161	7,191	233.073	0.000	32.462	0.000	265.535
Other	11.773	297	2.093	0.000	9.680	0.000	11.773
Totals	3,942.873	41,913	1,097.129	109.701	431.221	116.368	1,754.419

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 CHARLESTON COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	88.414	2,734	20.311	11.475	18.252	2.095	52.133
Mining	8.990	123	3.866	0.021	2.716	0.296	6.899
Construction	1,702.440	17,551	444.755	92.148	52.751	12.792	602.446
Manufacturing	2,254.816	10,475	393.724	8.184	204.408	20.058	626.374
TCPU	1,340.128	11,654	351.281	24.890	216.212	48.945	641.328
Trade	2,359.805	51,983	987.665	67.676	342.617	323.233	1,721.191
FIRE	2,457.129	14,900	319.889	97.512	1,109.283	243.173	1,769.857
Services	3,566.909	72,786	1,592.429	299.594	272.985	72.839	2,237.846
Government	2,772.090	53,721	2,009.772	0.000	594.844	0.000	2,604.617
Other	80.798	2,990	26.535	0.000	54.263	0.000	80.798
Totals	16,631.518	238,917	6,150.228	601.499	2,868.332	723.430	10,343.488

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 COLLETON COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	40.475	812	3.602	6.441	10.277	2.215	22.535
Mining	0.000	0	0.000	0.000	0.000	0.000	0.000
Construction	127.226	1,425	26.596	8.179	3.408	0.823	39.006
Manufacturing	329.583	2,393	78.823	2.283	27.457	2.652	111.215
TCPU	88.798	515	19.566	1.648	29.905	6.722	57.840
Trade	149.384	3,671	61.249	4.849	22.048	20.841	108.986
FIRE	104.207	684	11.372	4.340	50.075	10.040	75.827
Services	130.693	3,418	51.074	15.992	8.887	2.289	78.242
Government	81.015	2,301	61.486	0.000	9.456	0.000	70.941
Other	4.666	284	1.881	0.000	2.785	0.000	4.666
Totals	1,056.046	15,503	315.648	43.731	164.298	45.582	569.259

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 DORCHESTER COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	210.140	1,157	11.951	4.854	73.283	20.574	110.662
Mining	5.346	51	2.303	0.009	1.615	0.176	4.102
Construction	301.047	3,244	72.221	16.130	8.677	2.102	99.131
Manufacturing	1,030.153	5,075	206.473	4.280	96.352	7.441	314.546
TCPU	145.551	1,428	42.845	4.546	22.849	5.551	75.791
Trade	303.220	7,753	129.033	10.237	44.554	42.652	226.477
FIRE	229.352	1,205	23.114	6.754	118.297	23.553	171.718
Services	300.092	7,598	120.362	25.198	25.418	6.961	177.939
Government	185.302	5,080	142.654	0.000	20.041	0.000	162.694
Other	10.126	496	3.470	0.000	6.656	0.000	10.126
Totals	2,720.329	33,086	754.425	72.008	417.743	109.011	1,353.186

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 GEORGETOWN COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	74.415	1,002	7.076	4.378	21.078	5.027	37.559
Mining	2.602	23	0.801	0.006	0.852	0.081	1.740
Construction	226.149	2,543	47.091	14.215	6.007	1.450	68.763
Manufacturing	852.964	3,996	141.500	4.791	74.952	7.443	228.686
TCPU	71.058	599	15.500	1.448	11.623	2.464	31.035
Trade	253.186	6,962	104.890	7.865	34.129	31.296	178.180
FIRE	311.951	1,721	24.390	15.082	150.692	34.659	224.824
Services	280.833	6,427	120.768	26.475	23.691	6.180	177.114
Government	164.604	3,931	122.487	0.000	19.913	0.000	142.400
Other	7.281	271	2.105	0.000	5.176	0.000	7.281
Totals	2,245.042	27,474	586.607	74.260	348.112	88.602	1,097.582

*Millions of Dollars

Appendix I. (Cont.)

Base Year: 1998 HORRY COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	137.122	2,986	18.310	17.087	29.895	7.030	72.322
Mining	21.727	113	1.870	(0.089)	0.562	0.467	2.810
Construction	974.591	10,678	220.756	56.982	27.253	6.593	311.584
Manufacturing	1,182.904	7,206	235.656	6.993	97.127	10.432	350.208
TCPU	345.246	2,661	83.072	6.488	92.098	18.961	200.619
Trade	1,521.412	37,584	641.560	40.605	208.149	190.629	1,080.942
FIRE	1,595.170	10,696	162.995	77.798	721.193	162.401	1,124.387
Services	1,705.485	37,386	670.813	117.421	193.112	59.619	1,040.965
Government	459.157	10,573	343.498	0.000	55.600	0.000	399.098
Other	28.642	802	7.590	0.000	21.052	0.000	28.642
Totals	7,971.457	120,685	2,386.119	323.283	1,446.043	456.131	4,611.576

*Millions of Dollars

Appendix I. (Cont.)

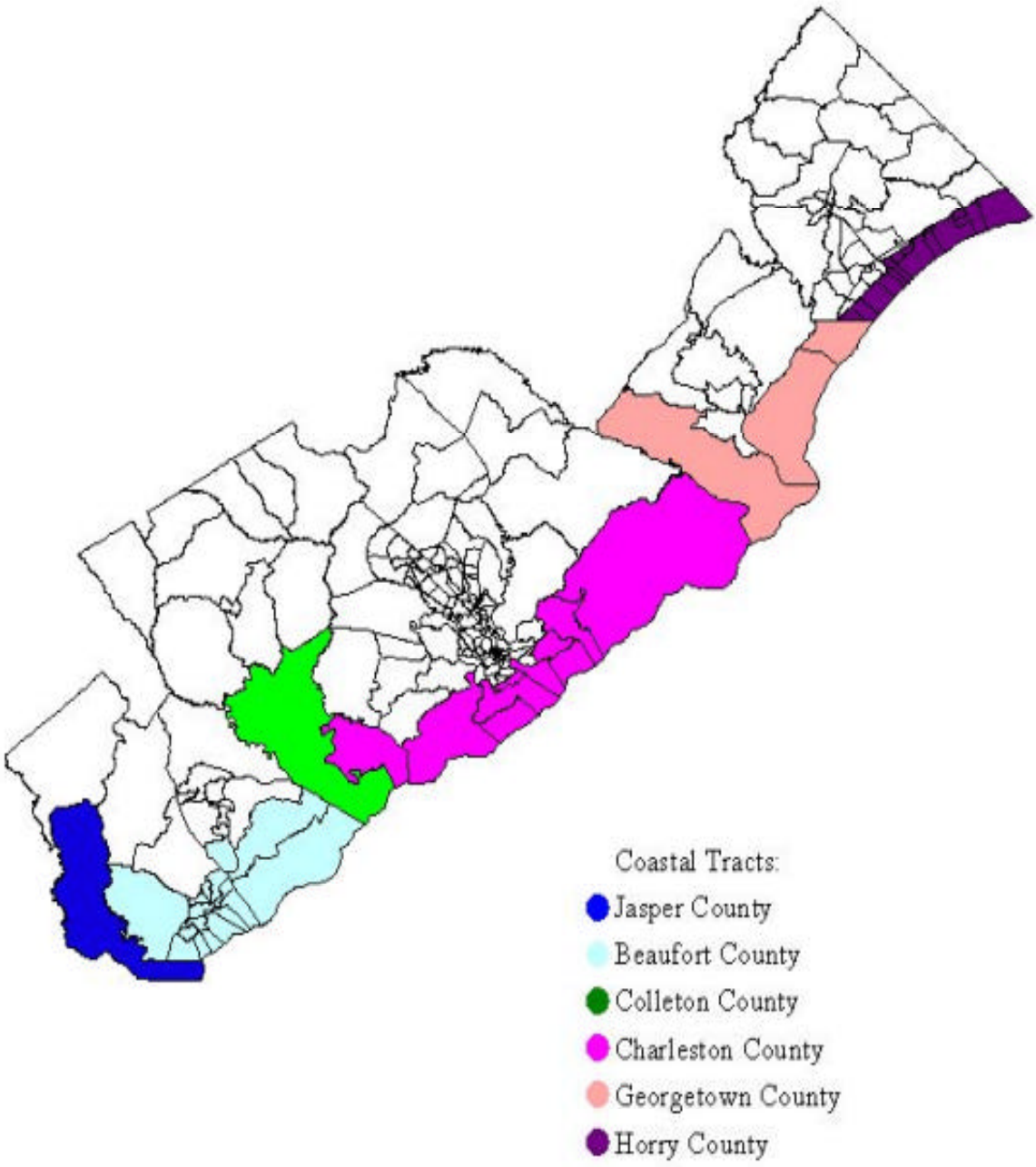
Base Year: 1998 JASPER COUNTY

Industry	Industry Output*	Employment	Employee Compensation*	Proprietor Income*	Property Income*	Indirect Bus.Tax*	Total Value Added*
Agriculture	21.845	320	1.533	2.071	6.699	1.419	11.722
Mining	0.000	0	0.000	0.000	0.000	0.000	0.000
Construction	82.463	922	17.655	4.967	2.219	0.536	25.377
Manufacturing	49.003	343	10.556	0.699	4.711	0.429	16.394
TCPU	31.589	203	8.309	0.634	8.241	1.743	18.926
Trade	53.828	1,343	21.789	1.798	7.669	7.177	38.432
FIRE	21.267	167	2.619	0.728	10.791	1.761	15.900
Services	61.826	1,679	20.682	9.145	7.288	2.276	39.392
Government	41.541	1,158	31.818	0.000	4.861	0.000	36.679
Other	1.888	112	0.866	0.000	1.022	0.000	1.888
Totals	365.250	6,247	115.828	20.041	53.499	15.340	204.709

*Millions of Dollars

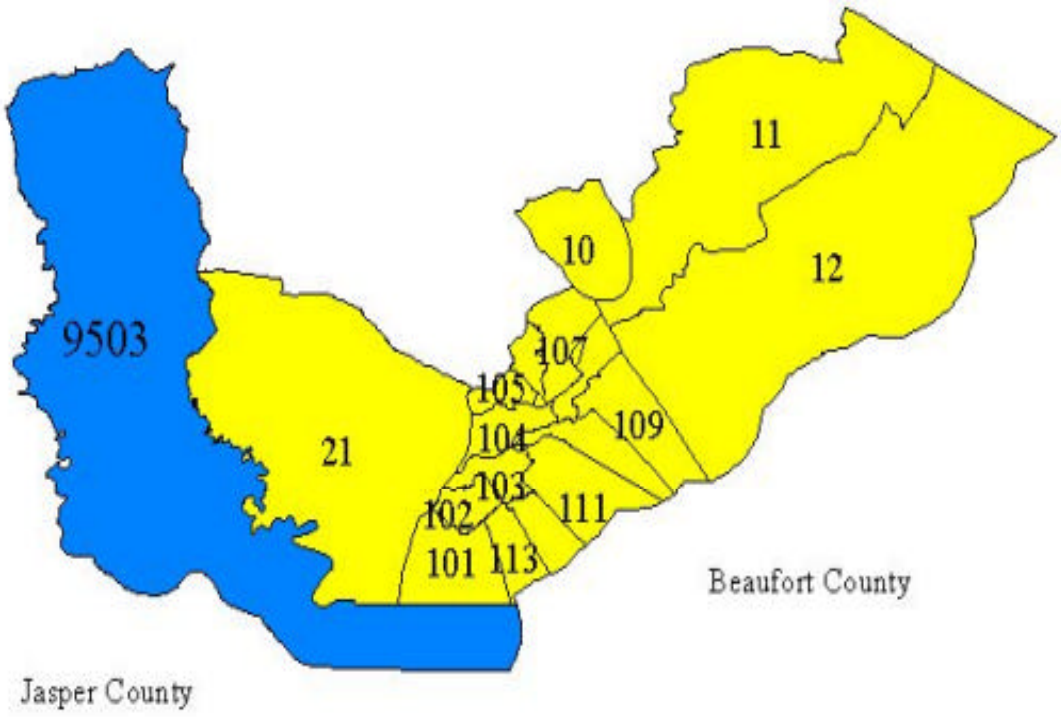
Source: Micro IMPLAN Group, 2000

Appendix IIA. Coastal Counties and Coastal Census Tracts



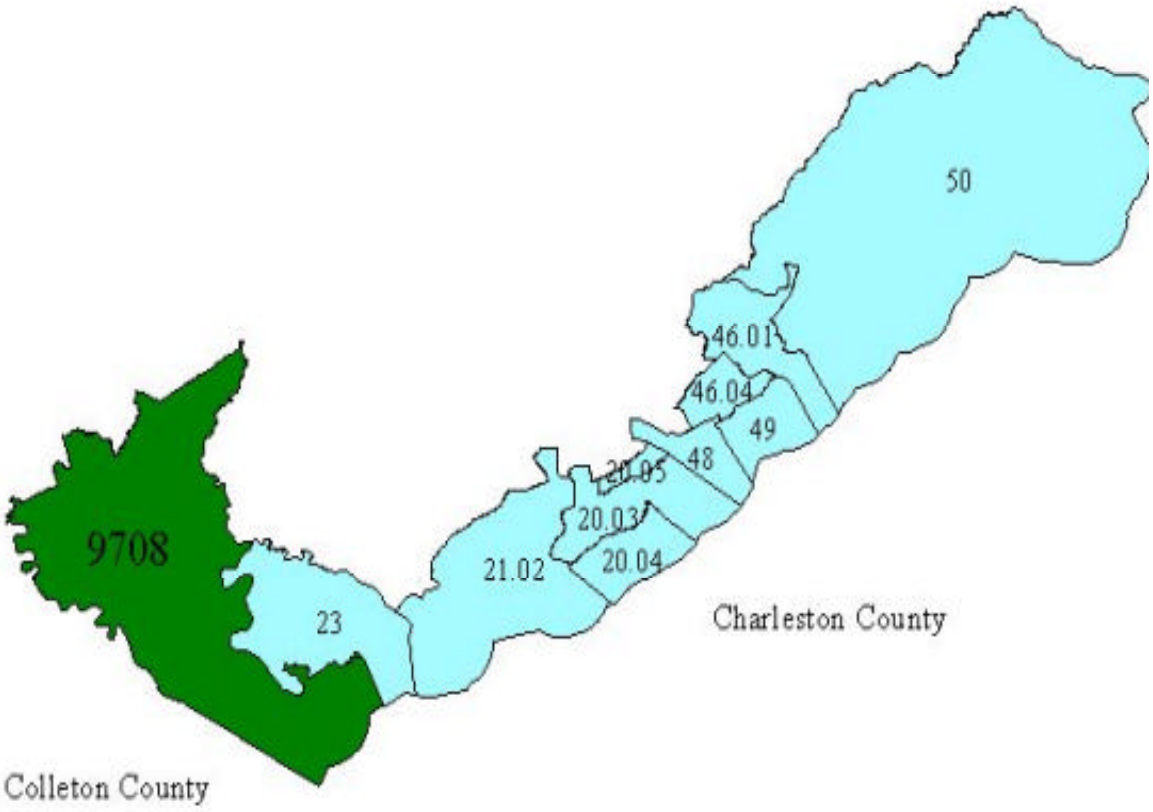
Source: Census 2000, U.S. Census Bureau

Appendix IIB. Jasper and Beaufort County Coastal Census Tracts, 2000



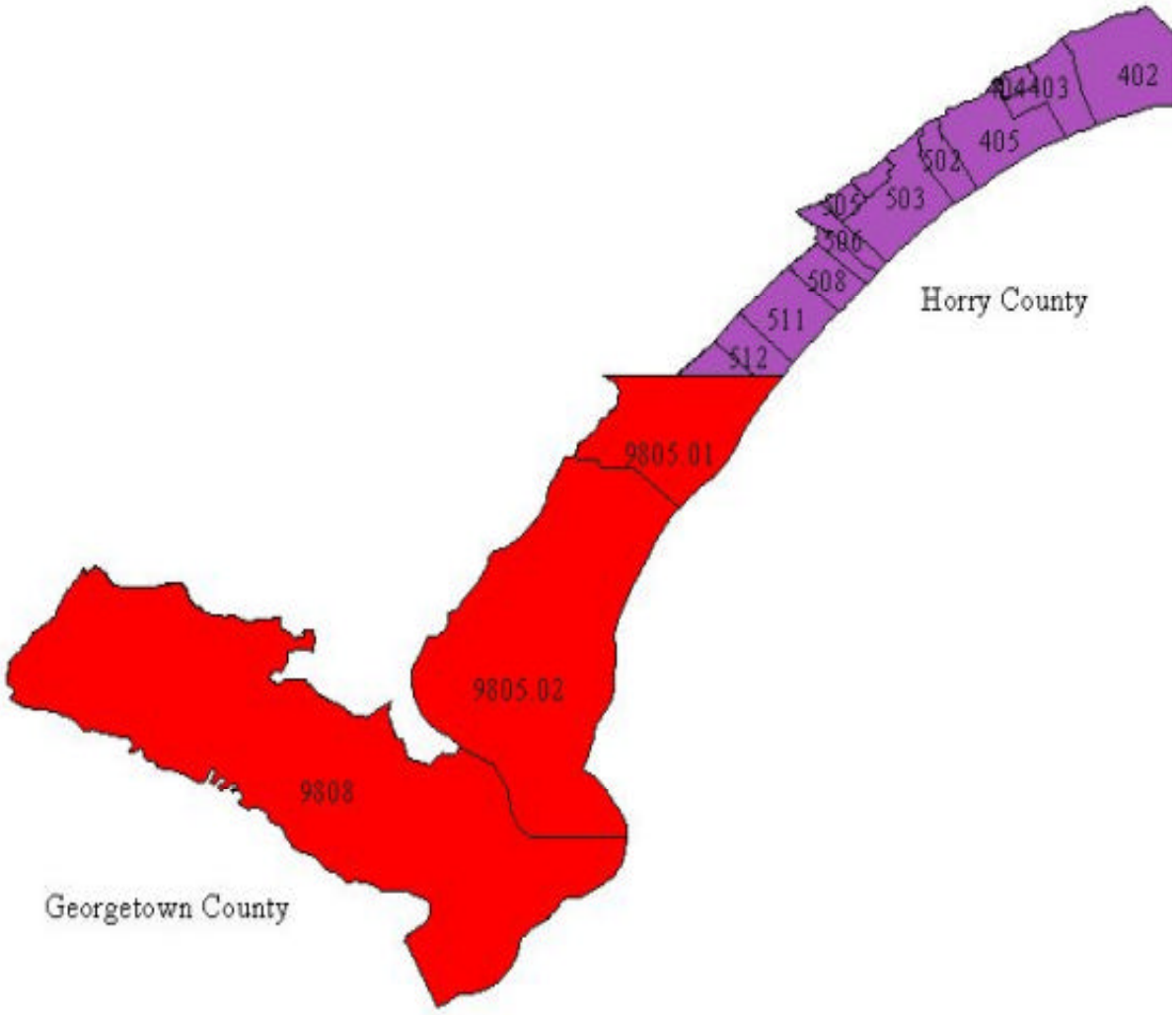
Source: 2000 Census, U.S. Census Bureau

Appendix IIC. Colleton and Charleston County Coastal Census Tracts



Source: 2000 Census, U.S. Bureau of the Census

Appendix IID. Georgetown and Horry County Coastal Census Tracts, 2000



Source: 2000 Census, U.S. Bureau of the Census

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