A Common Bond

Issues and Responses in South Carolina's Coastal Tourism Development

the PALMETTO CONSERVATION FOUNDATION

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The Palmetto Conservation Foundation is a private, not-for-profit organization dedicated to managing the growth of South Carolina consistent with the quality of life our citizens have come to expect. It brings a nonadversarial, research and project-based approach to the issues of growth management, land use planning, and conservation of natural and cultural resources.

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This paper was produced By Erin MacLellan, Greg Myers & Dr. Robert Healy for the Palmetto Conservation Foundation,

May 1992

Tourism is big business in South Carolina, bringing jobs and dollars to our state. For the past generation, state and local leaders have aggressively pursued tourist dollars as a way to fund schools, create jobs and generally improve the quality of life of our citizens. Nowhere is this more evident than on the coast.

Evidence is mounting however, that with the benefits of tourism comes problems. Environmental problems are growing. Traffic congestion and visual pollution increase yearly. Rapid growth brought on by tourism has increased age old racial tensions, as cultural character and native lands are transformed into glistening new resorts. Land use debates, rising taxes, and confrontations are becoming too commonplace.

This paper represents an effort by the Palmetto Conservation Foundation to bring issues in coastal tourism in South Carolina into focus. We are seeking to be neither a critic of tourism nor the industry's apologist. Rather, we intend to begin a rational debate on the issues raised in this paper, and to structure a workable solution to various problems.

The foundation gratefully acknowledges the time and efforts of those who participated in the preparation of this paper. We also thank The Ford Foundation, Merck Family Fund, and the State Policy Program of the Aspen Institute for their financial support.

Sincerely,

Robert T. Goble

Robert T. Goble
Chairman, Board of Directors
Palmetto Conservation Foundation

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Chapter One

An Overview of Tourism Issues Along South Carolina's Coast

South Carolina coastal natives Dan Ravenel and Phillip Simmons live dramatically different lifestyles. Ravenel is a member of Charleston's elite. He and his family live downtown on Broad Street in a home that has been occupied by their ancestors for seven generations, longer than any other Charleston family. An unpretentious man, Ravenel sells real estate and considers himself fortunate to live in one of the most attractive cities on the East Coast, if not in America.

Thirty minutes to the south, Simmons is one of a dwindling number of black natives on Johns Island. A descendant of slaves, Simmons owns 50 acres that his family has occupied since the Civil War. The former vegetable farmer survived bankruptcy and now works as a bank teller in Charleston. He considers himself "blessed" to live on a sea island that most people only dream about as a vacation destination.

Despite their contrasting backgrounds and lifestyles, Ravenel and Simmons share a common bond: they live in an economy driven by tourism. Both men say the tourism industry has had a tremendous impact on their lives, creating a host of benefits and problems. Like many coastal residents, Ravenel and Simmons consider South Carolina's fastest growing industry a topic of controversy. Tourism is at once a saving grace and a threat to their way of life.

Ravenel and Simmons were among more than 50 coastal residents who shared their views about tourism for this study. Interviews were conducted in Myrtle Beach, Pawleys Island, Charleston, Johns Island, Wadmalaw Island, Beaufort, St. Helena Island, and Hilton Head Island. The people interviewed came from all walks of life, from real estate developers and elected officials to native basketmakers and fishermen.

Their issues of concern were surprisingly similar and represent a starting point for addressing coastal needs in relation to tourism.

Overview of the Issues

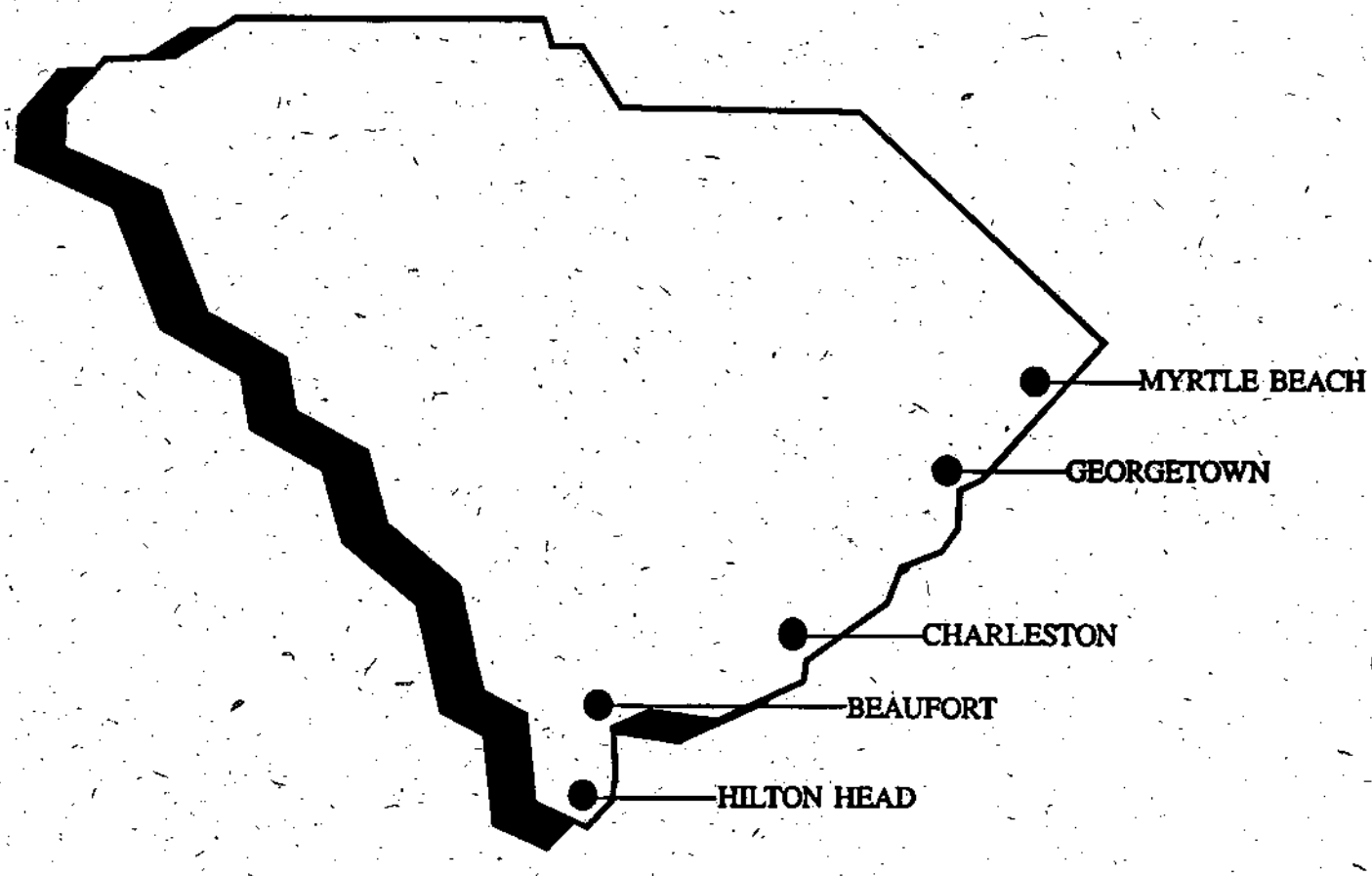
Worth $6.3 billion in 1991, tourism is South Carolina's second largest industry after textiles. The focus of tourism in South Carolina has been the coast, from the popular beaches of the Grand Strand to the elite resorts of the Sea Islands. Coastal tourism generates two-thirds of total annual tourism expenditures in the state, with Horry County alone accounting for one-third of the state-wide total.

On the plus side, tourism has generated substantial tax revenues for health care, education, and infrastructure. Additionally, it has created hundreds of thousands of new jobs and lured many visitors who later relocated to South Carolina, often as retirees.

On the downside, many contend that tourism is contributing to skyrocketing property taxes, environmental pollution and a loss of coastal cultures and traditions. Critics say tourism's benefits have bypassed coastal natives who have called the region home for generations. Some fear that tourism is destroying the very essence of the coast that attracted visitors in the first place.

During interviews with coastal residents, six common concerns emerged:

* Changing Coastal Character
* Racial Tensions
* Employment Opportunities
* Housing
* Taxation
* Environment


MYRTLE BEACH
GEORGETOWN
CHARLESTON
BEAUFORT
HILTON HEAD

Each of these concerns will be examined in detail in this paper, but to fully appreciate the role played by tourism in these issues, it's necessary to understand the industry's evolution and growth.

Tourism's Beginnings

Tourism's phenomenal growth is linked to the abundance and diversity of South Carolina's tourism "products." The Grand Strand alone consists of beaches stretching nearly uninterrupted for 55 miles. Further south, relatively undeveloped sea islands are woven together by a maritime matrix of creeks, rivers, and marshes. Coastal visitors can choose from the resort atmosphere of Hilton Head, the historic charm of Charleston and Beaufort, the cottage community of Pawleys Island or the family fun of Myrtle Beach.

Large-scale tourism is a relatively recent phenomenon in South Carolina. Prior to 1950, the coast was primarily the domain of native islanders, military personnel, and long-time residents. Tourism was highly localized, and for most people it was economically insignificant.

Charleston resident Dan Ravenel recalls his city during the 1940s, when tourism was a mere shadow of its present self. Downtown was for the most part rundown and unattractive, boasting only a few restaurants and many seedy night spots. Still, its pleasant weather and historic attractions drew some visitors from the north.

"Tourists came primarily from Philadelphia, New York, Connecticut and Boston, and they would stay in private homes or little inns," Ravenel said. "My grandmother, for instance, lived at 76 Meeting Street, and had a tearoom from February the first to May the first."

Along the Grand Strand, a single hotel and golf course in Myrtle Beach accommodated tourists prior to World War II. The area was predominantly a summer retreat for employees of the Burroughs-Chapin Company, a Conway-based livestock and logging concern which owned most of the land that later became Myrtle Beach.

"Families would come down from Conway and live in tents along the beach," said Bill Pritchard, executive vice president of Burroughs-Chapin, which today is still the largest landowner in Myrtle Beach.

The Age of Tourism

The post-war economic boom led to two developments that launched South Carolina's tourism age: air conditioning and interstate highways.

"Air conditioning was the most significant development leading to the growth of tourism. It made the near tropical heat along the coast bearable," said Bill Lawrence, executive director of the South Carolina Division of Parks, Recreation & Tourism (PRT).

Improved highway systems also drove tourism. The construction of the nation's interstate highways during the 1950s made long-distance travel possible. Interstate 95, which bisects South Carolina from north to south, is today the most heavily traveled vacation route in America.

In 1973, public consumption of alcohol was legalized. This legislative action fueled the growth of the restaurant and entertainment business in South Carolina, making the state more attractive to tourists.

Between 1970-1990, expenditures on travel and tourism in South Carolina rose more than tenfold. In 1991, some 6.4 million visits were recorded at the state's travel information centers. Accommodating travellers required 14.7 million room nights. About 58 percent of room visits — 8.5 million — were spent in coastal counties.

As tourism's potential became obvious to the state's business leaders, they began to criticize state government for not promoting the industry. In response, Governor Robert McNair recommended in 1968 that the legislature create the South Carolina Division of Parks, Recreation and Tourism (PRT).

PRT's staff and budget increased steadily as tourism's potential was realized. In 1979, PRT had a budget of $2.4 million, including $450,000 for advertising. By 1990, the budget for travel and tourism had grown to $9.4 million, and PRT spent more than $3 million to advertise the state as a tourist destination. The agency's 1990 ad campaign generated more than 685,000 inquiries.

PRT also provides marketing services for meeting and convention planners and operates fund-sharing and community development programs to provide financial assistance and professional expertise for tourism-related projects.

By any measure, PRT's work has paid off. A nationwide CNN/Gallup poll cited South Carolina as the third leading vacation destination for 1991 summer vacations. And South Carolina has become so popular as a tourism destination that PRT in 1989 began marketing to the international arena.

Tourism's Benefits

To politicians and the business community, tourism represents a huge tax bonus to the state. While only 3.5 million people live in South Carolina, more than 17 million annual visitors stuff South Carolina's coffers with millions of dollars in sales and accommodations taxes.

During the fiscal year 1990-1991, tourism poured a record level of tax revenue — more than $333 million — into state and local treasuries. That was a 10.3 percent increase over fiscal year 1989-90, according to PRT.

Tourism also has created thousands of new jobs. PRT estimates that the tourism industry accounted for 100,000 jobs in 1990 (see Chapter 2, Table 7). Along the coast, tourism employed about 70,000 people.

In addition to drawing visitors, tourism has had a secondary, inseparable effect: luring permanent residents to coastal areas (see Chapter 2, Table 1). Horry County is the fastest growing county in the state, and many of its new residents made their first contact as tourists. In 1960, Horry County had 68,000 residents; by 1990 its population had jumped to 144,000. Beaufort County also has experienced remarkable growth, from 44,000 in 1960 to 86,000 in 1990. The number of housing units, including both permanent residences and second homes, has grown far faster than the population (see Chapter 2, Table 2).

By attracting visitors and permanent residents, tourism has spurred many new businesses along the coast. Tourists and new residents create demand for tourism-related businesses like hotels, restaurants and shopping centers. They also have stimulated the expansion of industries indirectly related to tourism, such as banking, construction, and real estate.

"I've always promoted tourism," said Bill Cochrane, president of ALCOA South Carolina, which is the owner and developer of Dataw Island, an upscale residential community near Beaufort. "I couldn't sell Dataw without Beaufort."

Without tourism, Hilton Head Island residents would not be able to shop at the 350,000-square-foot Mall at Shelter Cove. The mall rakes in the majority of sales from April through August, when tourists flock to the island.

"Tourism has been a great benefit to the people living on Hilton Head," said Julie Fine, mall manager. "Only 23,000 people live here, but they enjoy the benefits of a Hyatt Hotel, entertainment, and the shopping experience of a major mall."

Despite the benefits of tourism, coastal residents cited numerous problems associated with the industry's rapid growth. One major issue of concern is the changing character of the coast, a transformation that dramatically impacts the lifestyles of residents, whether natives or newcomers.

Issue: The Changing Coastal Character

At the state level, tourism has been largely non-controversial, viewed primarily as an important and growing industry. In local communities, however, tourism has generated heated controversy and bitter feelings as residents struggle with dramatic changes to their homes and communities. Nowhere has this been more evident than in towns along the coast.

On Hilton Head Island, native islanders fondly recall the days when the island was pristine and cut off from the mainland. "The island was nice once," said Joe Driessen, 48. "Now there's businesses all over here to make money. You can't do a lot of things. Everyone's frustrated. It's not Hilton Head no more. It's like St. Augustine; it's a tourist spot."

Traditionally, coastal natives made a living fishing, farming and raising livestock. They had unlimited access to creeks and marshes that were breeding grounds for shrimp, oysters, clams, and crabs. Most families had a patch of collards, several chickens and a cow.

"My mama used to say that no one need to go hungry on Murrells Inlet," said Genevieve Peterkin, who spent her childhood summers on Murrells Inlet and now lives there. "You could fish for oysters, shrimp, and clams. There were no (fishing) seasons and no pollution."

Before tourism, economic activity revolved around sustaining the family. When harvests were too large for a single family, they were shared with others, Peterkin recalled. To acquire goods and services they couldn't provide for themselves, families bartered.

The traditional economy required little formal training or education. For example, Bennie Hudson, owner of Hudson's Seafood on Hilton Head Island, left school in the ninth grade but went on to build a prosperous fishing operation and opened one of the first successful seafood restaurants on Hilton Head.

Tourism in those days had little effect on local lifestyles. For the most part tourism was restricted to people making brief visits to beach cottages. "The native islanders weren't dependent on tourism back then,"

said Becki Brantley, who lives on Pawleys Island. "The old tourism didn't provide a lot of jobs, but it did raise the level of the economy."

While many reminisce about the simpler way of life before tourism, they also remember the struggles. There were few jobs, limited health care, and poor educational systems. Faced with a lack of employment opportunities, many people left the state for jobs and most of those who stayed had low incomes.

As for health care, it was sorely lacking along South Carolina's coast until the mid-1970s. Bill Jenkins, a native of Johns Island, recalls how his father transported the sick from the island to Charleston.

"He was often called upon to rush people to mainland hospitals, and some of those people died in the back of his truck while he waited for the bridges to close," said Jenkins, founder of Sea Island Comprehensive Health Care, Inc., which opened in the 1970s to serve Johns, Wadmalaw and Edisto islands.

As tourism growth accelerated, people began to take advantage of new opportunities to earn a living. "Oystering is a hard way of life," said Hilton Head Island native Bennie Hudson. "When tourism took off, people saw another life. They gave up oystering to rake the yards, be a chef, or work as a doorman at the hotels."

Local people slowly became integrated into the tourism economy and no longer relied solely upon hunting, fishing, and farming to sustain their families. Yet people who have chosen to maintain traditional employment and lifestyles find themselves under increasing pressure from tourism and development.

Fishing : An Occupation Under Pressure

Tourism growth had a major impact on residents who harvest the sea for a living. As tourists and new residents flocked to the coast, they put additional pressures on local fisheries. As a result, state officials instituted restrictions that make it difficult for small fishermen like Lonnie Taylor to make a living.

Lonnie Taylor has farmed and fished on Wadmalaw Island for 57 years. At dawn he climbs into his 16-foot plywood boat and travels down one of the island's many creeks, pulling crab pots and casting for shrimp. He returns home with the incoming tide, then drives to Charleston to sell his catch.

"I used to be able to make a living fishing, but now they have so many restrictions. They don't let you fish certain parts, and they tell you how much you can catch, and they won't let you sell shrimp unless you have a license," Taylor said.

Like most native islanders, Taylor chafes at the government restrictions and red tape created to control the increase in fishing by coastal visitors and new residents. He's been arrested several times for selling shrimp without a license. The $250 fines are a hardship on Taylor, who raised eight children and lives in a modest home.

South Carolina shrimpers Libby and George Ambrose, also of Wadmalaw Island, fear their livelihood will go by the wayside, partly as a result of tourism. The Ambrose's trawler, The Underdog, is docked on Bohicket Creek, a once quiet waterway that is now plied by pleasure boats and yachts. The Ambroses think

that waterfront property will become so valuable that docks will eventually be replaced by homes, marinas, and commercial establishments. They fear Bohicket Creek could become like Shem Creek in Mt. Pleasant.

Once a small fishing village, Mt. Pleasant is now a booming suburb of Charleston. Numerous trawlers used to dock along Shem Creek, but most have disappeared, replaced by seafood restaurants and pleasure boats. "The tourist trade chased away the shrimpers because waterfront property is now too valuable to tie up for docks," George Ambrose said.

Basketmaking: Rural Art Under Pressure

Elizabeth Mazyck also finds her lifestyle changing as a result of tourism. Mazyck is a sweetgrass basketmaker who operates a roadside stand along U.S. Highway 17 north of Mt. Pleasant. Mazyck, whose baskets are on view in the Smithsonian Institute, grew up helping her aunt sell baskets along Highway 17.

For Mazyck, tourism has been good in some ways, luring droves of visitors to Mt. Pleasant. But the thriving tourist trade that spurs her basket sales also has stimulated heavy residential and commercial development. This growth is now forcing Mazyck off the land where she sells her wares and also is threatening a 300-year-old art form unique to the South Carolina coast.

The All Saints Lutheran Church is building a new church on the land where Mazyck sells her baskets, so she will be forced to relocate. Over the past five years, Mazyck has watched many of her friends pushed out by development. In response to their plight, some elected officials have suggested building a basketmakers center, where all the women could gather to sell their art. Mazyck is willing to consider such a solution, but said she'd rather stay by the roadside. "This is just like home to me. I've been here since I was six years old."

Another problem created by tourism development is the destruction of the sweetgrass supply. "Developers are taking the land where the sweetgrass grows and stomping houses on them," said Althea Coakley of Mt. Pleasant, who has been weaving baskets since she was a child. In fact, sweetgrass supplies have become so scarce in South Carolina that many basketmakers go to Georgia to harvest the plant.

Not only does development threaten the sweetgrass supply, it brings increased traffic and congestion. "When I was a little girl, Highway 17 was a two-lane road. Now, I avoid going into Mt. Pleasant because it has developed so much. I'm afraid of the highway," Coakley said.

Urban Lifestyles in Transition

Charleston has changed drastically with tourism. As late as the 1950s downtown Charleston was impoverished, a notion that is difficult to fathom while strolling through the city's flourishing historic district.

"When I was growing up here in the '50s, my father struggled desperately along with everyone else," said Charleston native Dan Ravenel. "Charleston was a very poor place. Very few of the houses had paint on them. Virtually every house was white, because it was cheaper to buy white paint."

To make money, many people sought jobs elsewhere. "You left Charleston and lived somewhere else for 20 years and worked for Exxon, or Westinghouse, or somebody else in another part of the country. And then you came back here and opened up a business," Ravenel said.

While tourism has brought great economic benefits to Charleston, it also has brought mobs of visitors. "Three or four tour buses will drop off 100-200 people at a time and you literally cannot walk along the sidewalk," said Charlotte Fairey, director of Historic Charleston Bed & Breakfast, a local association.

Tourists roam at will, many unaware that most of the historic homes and buildings they see are still in use. "I've caught these people using my backyard as a urinal," Ravenel said. "This is a living city that does not have the facilities to handle all these people."

Tourism also has caused real estate taxes to rise dramatically, and the city's high cost of living is forcing out apartment residents and small businesses that have given Charleston much of its charm.

"Some people fear that Charleston is turning into a colonial Disneyland. They see tourism as a violation of Charleston," Ravenel said.

Ravenel and his wife Linda point to the problems of tourism, but they are also quick to acknowledge the pluses. Like Ravenel's grandmother, they entertain visitors and rent out their carriage house. The lodging fees help pay their $8,000 annual property tax bill.

And Fairey, who may dislike the crowded sidewalks, enjoys coordinating the local bed and breakfast traffic and rents out her own carriage house. Both she and the Ravenels make their homes open for tours and are clearly proud of their historic city.

"People want to have their cake and eat it, too," Ravenel acknowledged. "What we need to do is manage the growth better."

To the north, in Myrtle Beach, residents also find themselves at odds with tourism development. The most recent controversy is the Dixie Stampede, a family dinner theater with a Wild West theme that is being built near the exclusive Dunes subdivision. When the site of the new attraction was announced, the Dixie Stampede faced fierce opposition from Dunes residents, because it will increase traffic in their neighborhood. After months of debate, local leaders approved construction of the attraction, despite opposition from city planners. The Dunes subdivision residents have said they'll take the matter to court.

Issue: Racial Tensions

Changes and conflicts brought about by tourism have exacerbated age-old racial tensions along the coast. Many blacks interviewed for this study felt the tourism economy has been imposed on them by whites, many of whom have come into coastal communities from out of state.

Today, blacks are outnumbered in coastal areas, a dramatic change from 50 years ago. For example, Hilton Head Township in 1940 had 81 whites and 1,379 blacks. Now whites make up 90 percent of the island's population.

The transition from a rural black culture to a wealthy white culture has had an impact in many areas, including education. Six-generation islander Juan Byers said there is no question that the quality of education facilities on Hilton Head has improved. The small school house he attended as a child has been replaced by modern facilities and better services.

However, Byers said black children are at a strong economic disadvantage from the time they enter school, and that they adopt the expectations of the white students. "The white kids on Hilton Head go to school in BMWs and Mercedes. Our kids see what they have and they forget about their own culture," Byers said.

Additionally, schools stress the values of the dominant white community and ignore the local native island culture, according to Byers and fellow native islander Morris Campbell. The two black leaders deplore the fact that the schools don't teach courses about the sea island (Gullah) history and culture.

"People need to be taught who they are, but there's no one to teach our children about the sea island culture. When I was in school all the teachers were black," Campbell said.

Not only do native islanders believe they are losing touch with their culture, but they also are being denied access to land and waterways enjoyed by previous generations. Exclusive residential developments called "plantations" have been erected along the coast for wealthy retirees and second-home buyers. Guarded security gates at plantations prevent native islanders from entering without purchasing special passes. This has created great animosity on the part of blacks, whose ancestors once lived and are now buried on that same land.

Byers of Hilton Head Island feels especially angry about the plantations. His family's graveyard was placed near the sea before the Civil War to provide souls an easy passage to Africa. Now, the graveyard is part of Sea Pines Plantation, and the path to Africa is blocked by condominiums and a golf course. To visit the graves, Byers must seek permission to pass through the plantation's security gate.

Blacks also are angry because they believe the overwhelming majority of tourism benefits have gone to whites, in many cases out-of-state whites who have relocated to take advantage of economic opportunities.

"There's a basic mistrust between whites and blacks and it's becoming more divisive," said Joe Mix, a white Beaufort business leader and owner of Island Outfitters. "Blacks have not enjoyed the fruits of tourism, and as tourism continues to bypass blacks, they are feeling more and more exploited."

Thomas Barnwell, a black businessman and community leader on Hilton Head Island, said the island natives were not included in the island's economic development and have been ignored during its planning process. "You don't know how much it hurts to be left out," he said.

Additionally, blacks face almost insurmountable odds when they try to obtain financing and assistance for developing businesses. Of thousands of businesses on Hilton Head, only one dozen are owned by blacks, said Morris Campbell.

The sense of exploitation felt by blacks stems from the greed and prejudice of some business leaders, said the Rev. Tony Campbell, former executive director of Camp Baskervill, a service organization and ministry on Pawleys Island.

"Most developers just want to make a buck," said the Rev. Campbell. "They're not interested in developing the local economy. They come in here with the notion that blacks are just people who can cook and make beds. The indigenous population becomes invisible to them."

Many of the black native islanders interviewed for this report expressed skepticism about the project and its potential benefits. They complain that they have been interviewed and studied many times but have never seen any benefit from the studies.

Issue: Employment

As traditional lifestyles and occupations dwindled, tourism created numerous new job opportunities. But tourism workers complain about low pay, seasonal work, lack of benefits and limited prospects for advancement.

Tracy Winley, 26, is one of thousands of hospitality workers in Myrtle Beach. During the busy summer months of 1991, Winley worked as a hotel maid seven days a week at an hourly rate of $5.25. After subtracting taxes and $14 for bus fare, Winley took home $144 each week.

This fall, when the tourist season dropped off, Winley's hours were cut to part-time, and she took home only $95. "It's just a waste to tell you the truth. We work for nothing," she said. During the low season between December and March, Winley is laid off and collects unemployment.

The seasonality of tourism employment can be seen in the fluctuating number of jobs listed in the coastal offices of the South Carolina Employment and Security Commission.

Larry Parker, director of the employment office in Bluffton, noted, "In July, there may be 250 openings. Today [January 1992], there are 69."

In Myrtle Beach, inspection of job listings in October 1991, just after the tourism season ended, found fewer than 10 jobs of any kind. By that time, several hundred tourism industry workers had filed Form 114, which allows seasonally unemployed workers to collect benefits until recalled by their employers, without having to seek new work.

Transportation

Despite low wages, tourism jobs provide sufficient incentive to motivate people to travel long distances to work. Workers in Myrtle Beach come from as far away as Florence to their jobs. In Hilton Head, more than 600 workers travel up to three hours each day, from as far away as Allendale and Smoaks.

Workers usually travel in chartered buses and vans. They say they endure the long commute because tourism jobs are better than the minimum wages that they would earn at home. And in some communities, there aren't any jobs at all.

Not surprisingly, transportation is one of the major concerns of hospitality workers along the coast. Daily bus fares are a severe hardship on people earning little more than minimum wage. Because workers travel from long distances, many said they must catch the bus at dawn and don't get home until 7 p.m.

This long commute results in tired workers who are stressed out trying to find child care conducive to their work schedules, said Frieda Mitchell, who runs a daycare center on St. Helena Island. Nearly 65 percent of parents using the daycare facility's services are single heads of households, and most are working parents.

"Many women have to make arrangements with three different people to tend to their children while they're at work," Mitchell said. For instance, a typical working mother has to catch the bus at 5 a.m. and must find someone to care for her children in the early hours. Then she must ask someone to pick up her children when daycare ends, and also arrange for someone to babysit until she arrives home in the evening, Mitchell said.

Often these childcare arrangements fall through. When this happens, young children are neglected, and teenagers get into trouble with the law.

A recent study of public transportation, conducted by the Delowe Corporation for PRT (see bibliography) showed that reliability and cost were the two most important factors affecting the decisions of workers to use public transportation.

Despite their dependence upon public transportation for employees, only 38 percent employers located in the Lowcountry/Resort Islands area expressed a high degree of interest in improving public transportation, according to the Delowe study. And none indicated a willingness to coordinate shift times with public transportation schedules or in providing employees with a financial subsidy for transportation.

In the Grand Strand area, however, 86 percent of employers indicated a high degree of interest in participating in development of an improved public transportation network. Some 43 percent said they were willing to consider amending shift times to accommodate bus schedules, and 14 percent were willing to assist employees with payment of bus fares, according to the Delowe study.

Few Benefits for Hospitality Workers

Because her job is seasonal, Tracy Winley of Georgetown earns no benefits and has to pay for a private insurance plan that covers only hospitalization. Her situation is quite typical of those in the hospitality industry.

On Hilton Head, the majority of hotel workers go without benefits, according to the Hilton Head Island Packet newspaper, which published a special report called "Blacks on Hilton Head" in October 1991 (see Bibliography).

Only the largest resorts on Hilton Head pay health and life insurance benefits, and employees usually must work at least 32 hours a week annually to receive benefits, the newspaper said. At some hotels, workers who qualify for benefits pay for a portion of their coverage. The Mariner's Inn is the only hotel in Hilton Head providing medical, dental and life insurance at no cost to employees, according to the Island Packet.

The Mall at Shelter Cove, Hilton Head's largest shopping center, employs 25 full-time maintenance workers. By Hilton Head standards, mall employees are well treated. Starting pay is $6, but a few of the longer term workers are making $8 an hour, said Mall Manager Julie Fine.

Unlike most island employers, Fine provides her workers with a 6 percent annual pay raise, health and life insurance benefits and paid vacation. Nevertheless, she experiences a 40 percent turnover rate among maintenance employees. Fine isn't sure why turnover is so high, but she said most employers on Hilton Head experience the same problem, and that workers tend to float from job to job.

John Maxwell, owner of the Hendrix House Hotel in Myrtle Beach and a past president of the Hotel/Motel Association, said the hospitality industry should provide better benefits.

"The reason they don't is because there aren't any unions down here," said Maxwell, who moved to Myrtle Beach from Ohio. "Up north, the employers are under a lot more pressure to provide benefits because the unions are all over them."

Little Recourse for Grievances

In an effort to improve workers' conditions, Doris Grant, a Hilton Head native, has started a network on Hilton Head Island called the Underground Railroad. The organization has 200 members who pay $10 a year to receive information on employment rights. Network volunteers hear worker problems, then take action to resolve them.

Grant, who has worked as a maid and waitress, understands the frustrations felt by hospitality workers. "It's hard to get a raise and you work hard everywhere. They expect us to be satisfied grabbing crumbs off rich people's tables," she said.

Because there are no unions, workers are afraid to fight for better wages and benefits, Grant said. When a group of workers at the Hyatt Hotel in Hilton Head staged a walkout in 1990 to improve working conditions, they were promptly fired. Attempts by workers to organize a labor union on Hilton Head Island have as yet been unsuccessful.

The Greenville, S.C.-based Carolina Alliance for Free Employment is trying to establish a workers' rights group on the island, and the NAACP announced last fall that it wants Hilton Head businesses to sign a Fair Share Agreement similar to one signed a year ago in Myrtle Beach. The Fair Share agreement covers

issues such as hiring and promotion, procurement from black businesses, representation of blacks on boards, and contributions to black community groups.

Those fighting for improved worker rights said that unionization or Fair Share agreements could help reduce turnover, notoriously high in the hospitality and tourism industry.

Little Advancement

Tourism workers interviewed for this paper also complained about the lack of opportunities for job advancement within the tourism industry.

At age 18, John Taylor, son of crabber Lonnie Taylor, couldn't find work as a welder, so he took a job as a waiter at the Jasmine Porch, a posh restaurant on Kiawah Island. Ten years later, he's still working the same job, but said he's glad to have it, given the few employment alternatives.

The Hilton Head Island Packet newspaper reported in its "Blacks on Hilton Head" special report that blacks are poorly represented in management positions in the tourism industry.

At the Hyatt Hotel on Hilton Head, about 50 percent of the staff is black but only two of 20 department heads are black. At the Marriott, three of 32 managers are black, and at the Westin Hotel, 10 of 74 managers are black, the newspaper said. Hotel employers told the Island Packet that one serious obstacle to advancement is that many of the local blacks do not want to relocate. To climb the ladder in the tourism industry, it is often necessary to move. Of the minorities who are managers at Hilton Head hotels, several were brought in from out of state.

But black employees interviewed for this paper said they shouldn't have to relocate in order to be promoted. They also complained that there are so few supervisory jobs available, that it can be next to impossible to get one.

"I've been doing this job for eight years, but I work with ladies who have been here for 20 or 30 years," said Tracy Winley, 26, a hotel maid in Myrtle Beach. "All of those ladies would be ahead of me if a promotion ever came around. There's no chance for me to move up."

Few Job Alternatives

Coupled with seasonal work and limited job mobility, a coastal economy dominated by tourism offers few employment alternatives, according to those interviewed.

Employment statistics bear this out. On Hilton Head Island there are few jobs outside of tourism. Of the island's 18,000 person labor force, 10,000 people are employed in tourism.

Beaufort County has 32,730 non-manufacturing jobs, of which 10,470 are in the service sector, which includes tourism. Yet it has only 1,270 manufacturing jobs, the third lowest number in the state.

As a result, people seeking employment outside the tourism industry often must leave the coast. "There's a tremendous brain drain along the coast," said John Maxwell, a City Councilman and hotel owner in Myrtle Beach. "My daughter attends Coastal Carolina College, but there aren't any jobs here for her."

Althea Coakley, a Mt. Pleasant sweetgrass basketmaker who works part-time as a maid, said young people cannot find high-paying jobs. "You can't get into the factories. The people who work there got the jobs a long time ago, and they won't quit."

Like many coastal youth, two of Coakley's brothers left home seeking jobs, eventually settling in Sandusky, Ohio, where they now work in a meat packing plant.

Diversifying The Economy

Some business and government officials see economic diversification as the answer to long-term stable employment. "Tourism can be good if it is kept in balance," said Jerry Barkie, former mayor of Hilton Head Island. "We need some clean industry to stabilize the economy."

But therein lies the hitch. Many people contend that resort operators and developers are opposed to any industrial growth in Beaufort County. When Porter Incorporated announced plans in 1989 to build a yacht factory on the Colleton River near Hilton Head, local developers and resort owners opposed the project, and it ultimately failed to win approval from elected officials.

"There's a tremendous resistance to any light industry," said Beaufort business leader Joe Mix. "They're so afraid of having the environment damaged or having rampant industrial development so that they just resist all of it."

John Curry, chairman of the Hilton Head Island Visitors & Convention Center, said developers are not opposed to all industry, only to heavy industry that would detract from the island's tourism attractions. "We've often felt that being a one industry town is dangerous. What we need is a more diverse economy that would not detract from tourism," he said.

Curry would like to see more high-tech, clean industries like Kygre Industries, which is located in Hilton Head and makes night vision equipment. But he admits most high-tech companies don't want to locate on the island because it lacks an educated, trained work force.

Yet this same work force does offer opportunity for some manufacturers. A report issued in 1987 by the South Carolina State Development Board suggested that the high number of underemployed workers in the Lowcountry could provide an attractive incentive for recruiting manufacturers.

The issue of generating non-tourism jobs has been a focus of attention in efforts to determine the future use of the 4,000-acre Myrtle Beach Air Force Base, scheduled to close in 1994. Many residents think the base closing offers a unique opportunity to diversify the economy.

"Tourism is a very good thing, but we need more than that for our community to grow and flourish," said Garden City resident Jesse Ward. "We need high tech and business parks and offices so the kids who go off to college can get a job here when they're done."

Issue: Education And Training

Kitty Green, an African-American, recently opened two restaurants on St. Helena Island and in downtown Beaufort. "As a black person, I wanted to create jobs for other blacks and I wanted to network with both blacks and whites," said the energetic owner of the Gullah House restaurants.

But when she looked for employees, Green found it difficult to find workers with sufficient education and training. "Many of them could barely fill out an application. I decided not to worry whether they could read or write. We train them how to set up tables, cook, and serve," she said.

Education and training are critical issues among workers and employers in the tourism economy of coastal South Carolina. The state's illiteracy (see Chapter 2, Table 10) and dropout rates are among the highest in the nation, and the low educational level is a huge problem for employers.

"Basic skills. We need basic skills," said Coupe de Ville, director of personnel at Waccamaw, Inc., the Myrtle Beach-based household goods retailer. "Our employees have communications skills of the fifth to eighth grade level, but our stores require ninth to twelfth grade skills."

Low education is such a problem for Waccamaw that the company is developing a voluntary skills enhancement program for its workers. The program will be made available to Waccamaw's 2,400 employees, including 400 in Myrtle Beach.

Thomas Norby, a vice president at Sea Pines Plantation in Hilton Head, said Sea Pines has a six-week literacy program each year and offers internal training programs. But he thinks the hospitality industry needs to do more. "The resort industry as a whole has not kept pace with education. We need to do a better job at training and educating people."

Many workers with low-paying tourism jobs have little access to job training, said Veronica Miller, a board member of the Institute for Community Education and Training (ICET) in Hilton Head. ICET, a nonprofit group serving the indigenous and low income population of the Lowcountry, was founded in 1981 to train workers and link them with jobs.

The institute conducted a study of 2,000 women in 1985 and found that training was the most significant obstacle to finding jobs (see bibliography). And while 40 percent of the women who were employed said they needed job training, only 12 percent were receiving training, according to the study.

Presently, ICET has lost most of its funding for education and training programs. As a result, the institute is limited to providing the few services for which it has funding—after-school tutoring and a summer program for at-risk children.

Employer support for education and training is severely lacking in the tourism industry, said Anne McNutt, president of the Technical College of the Lowcountry (TCL) in Beaufort, which enrolls 1,228 students.

"Unfortunately, many of the employers around here aren't interested in developing a career ladder for their employees," McNutt said. "They just want to hire people for nine months out of the year and don't see a need to educate or develop them."

This situation surprised McNutt when she came to Beaufort five years ago from Nashville. "I was accustomed to living in a manufacturing economy, where employers demonstrated a much higher level of interest and support for education and training."

TCL strives to match the needs of a tourism-dominant economy, McNutt said. The college offers courses and degrees in tennis club management, culinary arts, hotel and restaurant management, horticulture, hotel maintenance, and other areas relevant to the tourism industry. To make classes accessible to workers, the college has evening courses and operates a satellite campus on Hilton Head Island.

All of the college's degree and certificate programs have an advisory council of employers who inform instructors about workplace needs. While this employer input is very valuable, McNutt would like to see more participation from employers in other areas.

"I'd like to see more employers provide tangible rewards like raises and promotions for employees who complete courses or earn a degree," she said. "I think more employers should provide assistance with tuition and school expenses. After all, good workers are at a premium in this area. But support for higher education is just not there, with a few exceptions."

McNutt pointed to the Royal Golf & Tennis Club on Hilton Head as a successful case study of employer training assistance. "They provide literacy training to their employees, and once they're literate, Royal Golf sends them to us. They're very interested in developing and training their employees."

McNutt said the college has a number of outreach programs to target people most in need of education and training. "But no matter what we do, there's a certain group we won't reach. Some parents just don't support and encourage their children to seek higher education. Those children don't even view higher education as an option."

Poor education along the coast is perpetuated by the demands faced by parents working in the hospitality industry, said Frieda Mitchell, who operates a government-assisted daycare center on St. Helena Island. The long hours these employees put in commuting and working makes it difficult to provide the stable, nurturing home life necessary to foster academic performance, she said.

Issue: Housing

Workers in the tourism industry repeatedly cited the lack of affordable housing as a major problem. Many commute from long distances because they can't afford to live in the resort areas where they work.

The problem is most acute on Hilton Head Island, where in 1990, the median value of owner-occupied housing units was $200,800, and there were more units valued at more than $500,000 than under $75,000.

Rental housing is also extremely expensive by statewide standards and nearby mainland communities such as Bluffton are reluctant to see an expansion of low income housing.

"There's a great need for more public housing on Hilton Head," said Juan Byers, who manages the only public housing project on Hilton Head and has long waiting lists for available units.

Tom Barnwell, a black leader on Hilton Head, is one of the few developers who have built homes and apartments for "working people." He also is the only black member of the Hilton Head Property Managers Association. Rent in Barnwell's properties range from $260 to $508 a month, based on the income of the renter. "My business has grown as a result of tourism. I provide housing to people who are natives and people who have moved to Hilton Head from Jasper County and beyond for jobs," he said.

Barnwell has a waiting list of 43 people who want space in his housing developments. He'd consider building more, but says bank financing is very tight.

John Curry, chairman of the Visitors and Convention Bureau on Hilton Head, said the island might face a major labor shortage in the future if efforts aren't made to build affordable housing for workers.

Even for managers, housing costs are high. "It's cheaper to live in the Chicago suburbs than on Hilton Head Island," said Julie Fine, manager of the Mall at Shelter Cove.

In Myrtle Beach, there's been talk of building dormitories for workers but nothing has materialized. The City of Myrtle Beach recently purchased some land to build moderate income housing costing $60,000, but that would not be affordable for most hospitality workers.

Near Pawleys Island, Camp Baskervill has built more housing for native islanders than the entire county housing program, said the Rev. Tony Campbell, former executive director of Camp Baskervill, an Episcopal outreach organization.

Issue: Taxation

Tourism and development have caused land values along the coast to soar, which in turn has increased property taxes. The higher taxes have raised much needed revenues for local government but also have placed a new burden on those landowners whose incomes have not kept pace with rising tax bills.

On Johns Island, many blacks have been forced to sell their land or have lost property at public auctions because of high taxes, said island native Bill Jenkins. "Blacks have lost so much land over the past 40 years that if they keep losing it at this rate, they'll have nothing left," he said. Part of the problem lies in the structure of land ownership along the coast, he said. After the Civil War, freedmen received land grants from the government or purchased property. To the newly freed slaves, land ownership took on a special significance. In a devastated post-war economy, land literally ensured survival.

Through the decades land was parceled and handed down from generation to generation without any of the landholders having clear title. This "heirs property" represented a safeguard passed from fathers to sons against the vagaries of the economy. During the post-World War II economic boom, many black landowners moved to northern cities in search of jobs. Those who stayed behind — often the old or less

educated individuals — were left with the responsibility of paying taxes on many parcels of family land. As tourism and related development grew, the land holdings of native islanders became more valuable, and taxes skyrocketed. Landowners who were unable to afford the taxes lost their land.

The nature of heirs property made it easy for developers to purchase the increasingly valuable land. Islanders often died without clear title or a legal will, so their landholdings were divided among remaining heirs, many of whom lived out of state. Developers purchased the choicest parcels of the heirs' holdings for nominal prices, isolating remaining landholders from roads or from creeks used for irrigation. As a result, the land became less useful and the remaining heirs were forced to sell at a discount to the developers.

As taxes soared on the sea islands, farmers were especially hard hit. Rising taxes often coincided with poor crop years. Phillip Simmons of Johns Island said he was forced into bankruptcy after several years of drought killed his crops, and his tax bill rose. "I almost lost everything. I was in despair. But through God's grace, I worked my way out of the black hole without losing my land," said Simmons, who now works as a bank teller in Charleston.

The Rev. Alonza Washington, pastor of the Hebron-Zion Presbyterian Church on Johns Island, said black leaders and churches now take an active role in trying to prevent land loss. Churches on Johns Island have set up a loose committee called "Save Black Land" to help people who can't pay their taxes.

"We've helped families locate absentee owners and convince them to pay their taxes so they could keep their land," Washington said. "If we find out someone is in trouble with their taxes, we take up collections to help them."

As development spills onto Johns Island from neighboring Kiawah Island, landowners like Phillip Simmons will continue to face increased taxes. On the land that his father once paid $7 in taxes, Simmons now pays $1,500. Japanese investors have purchased 400 acres next to his parcel and are selling lots for $80,000. "I may have to sell my land one day, but they're not going to get it for nothing," Simmons said.

While property values have soared, incomes for many people have not. As a result, native islanders end up being land rich but cash poor.

Jason Brown, who works as a bellman at the Westin Hotel in Hilton Head, said he paid $2,000 in taxes in 1976 on 10 acres bordering Highway 278 on Hilton Head Island. When the highway was widened, Brown's property was assessed at a higher value because of its potential commercial use. Even though Brown only has mobile homes on the land, he now had a tax bill of $9,000 last year.

Under South Carolina law, if a person lives on one piece of land but owns other property — as is often the case among native islanders — the other property is taxed at 6 percent of assessed value. However, land used as cropland or timberland can be assessed at 4 percent of its use value instead of 6 percent of market value. To be considered for the use value exemption, islanders must apply after the beginning of the new tax year and the use must be documented by inspection.

Zoning, potential land use, market value — all of these terms can be perplexing to native islanders unfamiliar with the intricacies of the tax system. "We've had to educate people about taxes," said Bill Jenkins of Johns Island. "We have to explain to some people that you can't go to the bank to borrow money to pay your taxes."

Jenkins recommends that people who can't afford their taxes lease their land rather than sell it. He and leaders at the Penn Center on St. Helena's Island hold workshops and classes to advise people on how to keep their land.

Tax Crunch in Historic Charleston

Rising taxes are not limited to rural coastal residents. Urban areas such as Charleston also are facing the tax squeeze. As Charleston became more appealing to tourists and retirees, home prices soared, according to Dan Ravenel, owner of Daniel Ravenel Real Estate Company. "In 1969, the Pineapplegate's house sold for $125,000, which then was the highest price ever paid for a house in Charleston. In 1990, the house resold for $2.1 million," he said.

"I've helped three people sell their homes because they couldn't pay their taxes," he added. "One woman was 76 years old when she left. Her family had owned the house for 85 years, but she had no income."

Ravenel, who himself pays $8,000 in taxes on his downtown home, thinks that property prices and the accompanying taxes are going to level off. "Tourism (in Charleston) seems to have topped out, and I think home prices have topped out as well."

Still, high taxes remain a problem for low and fixed income residents. Several elected officials in South Carolina have tried to find relief for these citizens at the legislative level. Rep. Harriet Keyserling of Beaufort is in favor of a circuit breaker law, which would tie taxes to income. Last year, she and former state senator James Waddell of Beaufort supported a circuit breaker bill, but it failed.

A local option sales tax in Beaufort County would have brought some tax relief, but it was soundly defeated by voters in November 1991. Charleston's local option sales tax resulted in a 15 percent decline in property taxes.

Taxation's Link to Services

The tax revenues generated by tourism have significantly increased the coastal area's tax base, providing funds for better schools, road construction, and water and sewer service. "Tourism has broadened our tax base and allows us to provide far more services and facilities than we would have otherwise," said Elrid Moody, a Beaufort County Councilman.

But a number of coastal residents said they don't think they are getting their money's worth for the taxes they pay. A citizens group in Beaufort called Focus on Beaufort has mobilized to study the issue and fight for tax reform.

Focus on Beaufort released a report last fall that said between 1981-1990, property values in Beaufort County increased 260 percent and taxes rose 350 percent. The study also said Beaufort County spends twice as much as the average South Carolina county.

Focus on Beaufort leader Harry Smythe said that some local officials try to justify spending by claiming that tourists drive up costs. But according to Smythe, tourists can be "blamed" for at most, $1 million of

county government costs. "If less than $1 million is due to tourists, then why are we spending approximately $17 million more than the average county?" he wrote in his study. "Clearly past spending has been excessive in some areas."

On Wadmalaw Island, some residents said they've seen no improvement in services despite the growth in tourism. "There's no playground, no gym, no recreation for kids," said Kiawah Island waiter John Taylor, who lives on Wadmalaw Island and has a two-year-old son. "From what I see, if you have money you get what you want. For years we've had pot holes on Bears Bluff Road, and in the summer you can't even walk along the road because the grass is so high. But in less than two months, the state widened [nearby] Bohicket Road to four lanes for the Ryder Cup," Taylor said, referring to the road to Kiawah Island, where the international golf tournament was held in September 1991.

On Hilton Head, residents Morris Campbell and Juan Byers said tourists strain the community infrastructure by clogging roads. But their main complaints were directed at local leaders, who they say have diverted infrastructure resources to serve the needs of the plantations. Entire native islander communities, such as Spanish Wells, have been bypassed by water and sewer, while these services were made available to plantations next door. Campbell said some native islanders are taxed for water and sewer services that they do not even receive.

Issue: Environment

George Ambrose of Wadmalaw Island has stood on his dock and watched dusk fall on the surrounding marsh for many evenings during his shrimping career. On clear evenings, a soft amber light reflects from reeds of sweetgrass and distant trees hang silver with Spanish moss. Kingfishers and other birds swoop for food.

"This is what it's all about," Ambrose said, taking in the last few moments of a South Carolina coastal evening. "This dock's been here since 1947, and the view doesn't look much different."

But Ambrose fears that the view will change soon, the result of development's environmental impact along the coast, and he's not alone in his concern.

At the University of South Carolina, researchers are busy measuring the effects of development on coastal ecosystems, according to *Carolina*, a university magazine. The researchers have identified a number of environmental problems including:

* Beach erosion, ranging from an 18-inch annual loss on the 55-mile Grand Strand to 20- and 30-foot losses on parts of Edisto Beach and Folly Beach;
* Fish kills resulting from polluted runoff from parking lots, roads, developments and golf courses;
* Ground and surface-water contamination from overtaxed septic tank systems;
* Contamination and destruction of wetlands and marshes that serve as breeding grounds for fish and habitat for wildlife.

As development intensifies, tourism's environmental impact is becoming an issue of higher priority for individuals and organizations along the coast. One of the most active in the environmental arena is Dana

Beach, director of the Coastal Conservation League in Charleston. "Tourism has had positive and negative effects on the environment. Tourism has been a good thing in that it promotes an awareness of natural resources. That's the ecological value of tourism," said Beach. But golf courses, resorts and housing developments are replacing or destroying wildlife habitat and maritime forest all over the coast, Beach said.

Habitat Encroachment

Even Kiawah Island, held up as a model for environmental sensitivity, has lost important habitat as a result of development, Beach said. "When you fragment an island by development, you end up with a fragmented ecosystem. Kiawah looks good, but it's 95 percent window dressing. The 5 percent that is good are the setbacks from the ocean, which are fairly tolerable. They [Kiawah developers] did a lot better job than Seabrook, which is just a disaster." On Kiawah the planned addition of 36 docks and 42 floats has created a battle between environmentalists and developers.

For the most part, coastal development has taken place with little comprehension of the natural processes of the coast, according to Beach. "When developers claim they are setting aside land for preservation, it's usually the least marketable land," he said. "They usually make those decisions based on what they think they can sell rather than preserving the most important habitats."

The infrastructure required to support tourism is damaging to the environment, Beach said. "Tourism means lots of automobiles, and roads are difficult to build in an environmentally sound way. Roads cause wetlands to be filled in and concentrate pollution from runoff."

Of course, it is not just shopping malls and resort developments that impact the environment; it is the tourists themselves, said Margaret Davidson, director of the Sea Grant Consortium in Charleston. "Tourists walk on dunes and tramp through marshes, use our water and generally contribute to stresses on the coastal environment," she said.

Often, tourists are quite unaware of their impact because they are in the state for such a short time, Davidson said. "Tourists have little incentive for conservation of coastal resources. They have less understanding of the fragility of coastal ecosystems."

Water Pollution

Fisherman Lonnie Taylor knows about those problems. Ten years ago, it was rare to see more than a handful of boats in the creeks on Wadmalaw. Today, the place is "crawling with boats," Taylor said, and modern marinas have been built to serve the waterbound traveler.

Besides the oily bilge constantly pumped into the water, marinas use a variety of chemicals in the cleaning and repairing of boats. "There are oil slicks on the water now, and the crabs don't live as long as they used to. I had to throw away half my catch yesterday," Taylor said.

Coastal residents also note that it's now commonplace to see signs posted by the Department of Health and Environmental Control warning people that the water and oysters are polluted.

Shrimper George Ambrose complained about trash strewn by recreational boaters, mostly tourists and new residents who come to view the marsh or shrimp and crab themselves. "You can tell when your nets have hit bottom by the number of beer cans you haul up," Ambrose said.

Wakes and pollution from the constant boating are adversely affecting marine life. Oyster banks and marsh grass are washing away. Heavy boat traffic on the Ashley River is even eroding the banks of Drayton Hall and Middleton Place — plantations known for their fabulous gardens and architecture.

North of Georgetown, a team of researchers at the Belle Baruch Institute of Marine and Coastal Research is sampling water and marine organisms in a pristine estuary and comparing findings with a developed area near Murrells Inlet. The comparisons are possible because the Baruch Institute is situated on the North Inlet, one of the cleanest estuarine ecosystems in North America, according to Dr. John Vernberg, the institute's director. Preliminary results show that compared with North Inlet, the Murrells Inlet area has higher levels of petroleum compounds, a result of run-off from parking lots, developments and automobiles. The team also has found that levels of fecal coliform bacteria are higher in Murrells Inlet, a result of septic tank overflow.

Vernberg said the Baruch team is only 18 months into a five-year research project, so results are preliminary. When the study is completed, the Baruch Institute will share the information with the state's policy makers, he said.

Visual Pollution

Tourism also has pervasive impacts on the visual environment. In some places, such as downtown Charleston and the Georgetown and Beaufort waterfronts, tourism provides much of the money that keeps historic structures maintained and occupied. In areas like Myrtle Beach, high-rises line the beaches, and strip commercial development extends unbroken along miles of coastal highway.

A striking contrast between the traditional and developed coast can be found at the Meher Spiritual Center. Located in Myrtle Beach on 500 acres of virgin timber, pristine lagoons and uncluttered beaches, the center is owned and protected by an Indian spiritual group, Meher Babba.

In a sense, the center is a coastal retreat for the spiritual tourist. But unlike neighboring resorts, visitors here tour on foot and sleep in rustic cabins. Once a traveler steps outside the center's gate, however, he is thrust into the world of shopping centers, motels, restaurants, and miniature golf courses so common to Myrtle Beach. "Meher Babba had a word for this type of development. He would call it 'unnatural impressions,'" said a Meher Babba follower who gave only his first name, Joe.

Need for Planning

Environmental researchers stress that they are not anti-development, but feel that tourism needs to be better managed and understood to reduce its impact on natural resources.

"We're trying to be objective about development of coastal areas. The key is how development is done and managed," said Vernberg of the Baruch Institute, who said the institute can provide information that will help people make better decisions about the future development of the coast.

Dana Beach of the Coastal Conservation League sees a need for stronger land use regulations, pointing to downtown Charleston as an area that has maintained its integrity through strong planning. "Tourism has revitalized the city. Charleston has a very efficient urban design. It is transit oriented, has a high density and efficient land use. Its housing is diverse, and the city supports pedestrian lifestyles."

Myrtle Beach is engaged in its own long-term land use planning, designed to make its urban environment less harsh, said Jack Walker, the city's director of planning. Walker has put together a land use plan that extends to the year 2020, and if approved, it would drastically change the area's urban complexion. Myrtle Beach's most recent land-use plan was developed in 1979.

The 2020 plan calls for the removal of all current oceanfront buildings downtown at a cost of about $60 million. The buildings and Ocean Boulevard would be relocated further west to front a man-made lagoon. The lagoon would serve as a stormwater drainage basin and a waterfront location for shops, restaurants, apartments, and hotels. The waterfront development would give Myrtle Beach a unique character and appeal to visitors interested in more than just sun, sand, and golf, Walker said.

Under the 2020 plan, Myrtle Beach's 12-mile beach would be linked to a network of bicycle paths and to urban parks located along the city's many "swashes," or creeks, Walker said.

Dana Beach believes that rural areas must be just as tightly planned and regulated as urban areas if they are to retain their character. "The barrier islands should have tight, comprehensive land use regulations to protect the maritime ecosystem instead of giving people carte blanche to do what they want," Beach said. Beach stressed that the tourism industry has a cumulative environmental impact. "You can't point to one single development, golf course, or marina and say that's the one that caused all of the problems. These developments have a cumulative effect."

The solution is comprehensive land use planning that takes into account the cumulative effects of tourism, Beach said.

Summary: Challenges Ahead

Most of the coastal residents interviewed for this paper expressed a great deal of ambivalence toward tourism. They readily acknowledged the material benefits provided by tourism. At the same time, many believe that tourism development is threatening the character of the coast that they find so appealing. Many also said that elected officials and business leaders are unresponsive to quality of life concerns.

A number of coastal residents said that they are troubled by the exploitative nature of tourism, with black residents in particular expressing deep-seated anger toward the industry from which they gain little financial benefit. Residents, both white and black, feel that the hospitality industry shows little respect for them as human beings, treating them instead as a dispensable part of a "labor force."

Feelings of alienation are especially prevalent among blacks on Hilton Head Island and sister islands, such as Daufuskie. The culture, economy, and politics of this area reflect deep racial divisions, a concern not only of black native islanders but also of resort and elected officials.

Tourism cannot be blamed for all the problems of blacks and other disenfranchised Lowcountry residents. But it certainly has exacerbated historic tensions, and community leaders say little attention or money is being directed to resolving these issues. If allowed to persist, these tensions have the potential to damage South Carolina's reputation.

Fortunately, some coastal areas reflect a more conciliatory relationship between native blacks and whites. For example, several tourism-related intitiatives in the Beaufort area are underway that hold promise for bringing together blacks and whites in economic endeavors.

Interestingly, only a few people interviewed for this study wanted to return to the days before tourism. Yet virtually everyone said that tourism growth needs to be better managed and planned. The social challenge facing community, business, and government leaders is how to expand the tourism economy in a more equitable manner. Stated another way, the challenge is to position more people to take advantage of the opportunities offered by tourism.

From an environmental standpoint, it seems obvious that tourism should be managed in a way that protects the very essence of the coast that attracts visitors in the first place.

Each of the issues outlined in this study are being confronted in innovative ways by people up and down the coast. The remainder of this paper explores how certain coastal communities and residents are dealing with the pressures created by tourism development and provides insights to others who might want to turn challenges into solutions.

Chapter Two

Coastal Tourism in South Carolina: A Statistical Overview

Tourism is not an easy activity to portray statistically. In contrast to a manufacturing industry, such as textiles or chemicals, the number of enterprises involved in the industry is very large and the average size is small. Enterprises directly serving tourists are also extremely diverse. They include transportation companies, hotels and motels, campgrounds, restaurants, state parks, museums, nature centers, places of entertainment, renters of automobiles and boats, and providers of guided tours and carriage rides. Tourists also spend money at many sorts of retail establishments. For some, such as souvenir shops and art galleries, tourists make up the preponderance of sales; for others, such as grocery stores and pharmacies, tourist trade is blended with that of local patrons.

The statistical record of tourism also blends with that of a related, but quite distinct, activity--permanent settlement motivated by amenity considerations. South Carolina's coastal communities have drawn not only tourists (usually defined as persons spending the night away from home or traveling more than 100 miles from their usual place of residence) but also large numbers of settlers. Many are retirees, although there is a considerable number of persons having full-time jobs, and many retirees who work part-time. Intermediate between the tourist and the permanent settler are the buyers of second homes or condominiums. These are sometimes occupied by the owner, sometimes rented to tourists, and often are devoted to both purposes. And many second homes are bought by middle-aged persons with eventual retirement in mind.

If one looks at a resort development, it is often impossible to determine how much of its occupancy is due to "tourism," how much to permanent residents, and how much to units that serve a combination of the two purposes. The same is true when considering sales at restaurants and shops, attendance at museums and festivals, or the composition of a traffic jam or a crowded beach.

The tables that follow incorporate measures of both tourism and residential growth. Some are mainly due to tourism, for example, the number of hotel rooms, employment at hotels and attractions, and revenues from the accommodations tax (although even there one cannot distinguish business travel from tourism.) Many indicators inextricably mix the two phenomena.

Population Growth. Table 1 summarizes the growth of population during the past five decades for the six coastal counties and the state as a whole. During this period, the coastal counties grew much more rapidly than did the state (140 percent for coastal counties; 84 percent state-wide). There were particularly notable growth spurts since 1970 in Horry County (up 106 percent) and in Beaufort County (up 69 percent). During the 1980s, when statewide population growth slowed, Horry continued to grow rapidly, and Beaufort accelerated. But Charleston, Colleton, Georgetown and Jasper counties lagged.

There have also been notable changes in the racial composition of the population. (Table 2) During the 1980s, when population growth for blacks and whites was about the same statewide, the white population of Horry, Beaufort and, to a lesser extent, Georgetown counties rose extremely rapidly in comparison with the growth of the black population. This tendency is particularly noticeable when one looks at specific coastal areas. In Hilton Head, for example, whites made up 80 percent of the 1975 population of 6,511, but 89.5 percent of the 1990 population of 23,694. (According to the 1940 census, Hilton Head had 81 whites and 1,379 "Negroes".)

Housing Units. There has been a tendency nationwide for the number of housing units to rise more rapidly than the population, reflecting falling average family size. Along the South Carolina coast, there has been the added factor of second home construction and of retirees (who tend to live in small-sized families).

Table One
Population By County

TABLE 1: POPULATION BY-COUNTY													
		1940		1950		1960		1970		1980		1990	
			NA		%change		%change		%change		%change		%change
Beaufort		22037		26993	0.225	44187	0.637	51136	0.157	65364	0.278	86425	0.322
Charleston		121105		164856	0.361	216382	0.313	247650	0.145	276974	0.118	295039	0.065
Colleton		26268		28242	0.075	27816	-0.015	27622	-0.007	31776	0.150	34377	0.082
Georgetown		26352		31762	0.205	34798	0.096	33500	-0.037	42481	0.267	46302	0.090
Horry		51951		59820	0.151	68247	0.141	69992	0.026	101419	0.449	144053	0.420
Jasper		11011		10995	-0.001	12237	0.113	11885	-0.029	14504	0.220	15487	0.068
STATE TOTAL		1899804		2117027	0.114	2382594	0.125	2590713	0.087	3121820	0.205	3486703	0.117
Sources: Census of Population, US Bureau of the Census, 1950-1990													

Table Two
...n By Race

TABLE 2: POPULATION BY RACE												
		1960		1970		1980		1990			% Change 80-90	
		Black*	White	Black	White	Black	White	Black	White		Black	White
Beaufort		17158	27029	16848	33864	21504	42454	24582	59843		0.143	0.410
Charleston		78911	137471	77884	168414	95251	178132	102988	187553		0.081	0.053
Colleton		14226	13590	12930	14597	14436	17141	15469	18671		0.072	0.089
Georgetown		18144	16655	16204	17258	19030	23332	19980	26151		0.050	0.121
Horry		18264	49983	17398	52471	22443	78185	25160	117098		0.121	0.498
Jasper		7633	4604	6783	5095	8289	6176	8889	6529		0.072	0.057
STATE TOTAL		829291	1551022	789041	1794430	948623	2147224	1039884	2406974		0.096	0.121
* 1960 Classification did not specify race, but categorized population as white and nonwhite.												
Sources: Census of Population, US Bureau of the Census, 1960-1990												

Table Three
Housing Units

TABLE 3: HOUSING UNITS									
		1960		1970		1980		1990	
		TOTAL	MV($)*	TOTAL	MV($)	TOTAL	MV($)	TOTAL	MV($)
Beaufort		8170	6200	14097	16300	27309	50600	45981	112100
Charleston		15131	10500	77067	17300	99748	41300	123550	73800
Colleton		5045	5400	8581	11800	12144	27700	14926	47400
Georgetown		4334	5700	10813	13100	16416	36000	21134	63800
Horry		11359	9700	29109	16300	55003	43000	89960	75600
Jasper		2865	5000	3668	10500	5292	27500	6070	44400
STATE TOTAL		678379	7500	815309	13000	1154118	35100	1424155	
*Median Value for Owner Occupied Housing Units									
Sources: Census of Housing, US Bureau of the Census, 1960-1990.									

TABLE 4: HOTEL/MOTEL ROOMS	
	1990
Beaufort	4014
Charleston	8284
Colleton	1046
Georgetown	758
Horry	22976
Jasper	1448
STATE	70958
Source: SC Dept. of Parks, Recreation and Tourism	

Table Four
Hotel/Motel Rooms

Table 3 presents the number of housing units for the coastal counties and statewide. In Beaufort County, where population rose by 69 percent during the period 1970-90, the number of housing units rose 226 percent. For Horry County, the corresponding figures are 106 percent (population) and 209 percent (housing). In Georgetown County, where population rose 38 percent, housing units went up 95 percent.

Hotels and Second Homes. The single best indicator of the presence of the tourist industry in an area is the number of hotel/motel rooms. Table 4 shows how these vary from county to county along the coast. By far the greatest concentration is in Horry County, with 22,976 rooms in 1990. It is followed by Charleston County (8284) and Beaufort (4014). Coastal counties contain more than half the hotel rooms in the entire state, with nearly a third of statewide hotel rooms in Horry County alone.

South Carolina's coastal counties also contain 33,639 "vacant units, held for seasonal, recreational or occasional use," about two-thirds of the statewide total. (See Table 5) This is the Census Bureau's measure of second homes, including units managed as time-shares. As with hotel/motel rooms, second homes are disproportionately concentrated in Horry County, with 19,951, followed by Beaufort County (6,602 units) and Charleston County (4,364). Changes in the census definition over time make comparisons somewhat unreliable, but even definitional changes cannot obscure the tremendous growth of second homes in Horry County during the 1970s and in Beaufort and Charleston counties in the 1980s.

Many of the seasonal homes are rented to tourists for a significant portion of the year. A 1991 survey of out-of-state visitors to the Grand Strand found that, although 44.5 percent stayed in hotels or motels, some 24.3 percent rented private properties (an additional 7.2 percent stayed in time shares and 7.4 percent camped.) PRT figures for 1990 show 14,708 "villa and timeshare units" in coastal counties and 11,406 campsites. This was 97 percent of statewide villa and timeshare units, and 62 percent of statewide campsites.

Travel Expenditures. Table 6 presents estimates released by the South Carolina Department of Parks, Recreation and Tourism (PRT) of total travel expenditures by county. These figures are calculated by the U.S. Travel Data Center with a "Travel Economic Impact Model" based on estimates of 15 travel expenditure categories and their impact on 14 types of travel related retail businesses. Figures for 1988, the latest available year, indicate total expenditures in coastal counties of $3.1 billion. Duirng the period 1980-88, spending rose by 152 percent, far surpassing the rate of inflation.

Consistent with the hotel room figures, expenditure data indicate that Horry County garners approximately 51 percent of all coastal tourism spending. Although Horry County continued to experience the largest absolute gain in travel expenditures during the 1980-88 period, the largest percentage gains were in Beaufort and Charleston Counties. During this eight year period, travel expenditures in Horry County doubled, while those in Charleston tripled and those in Beaufort quadrupled.

A certain amount of sectorally-specific data is also available. For example, a special PRT study of the important golf industry on the Grand Strand counted 74 18-hole courses (43 of them opened since 1980), which generated (1990) direct expenditures of $288 million.

Employment, Job Types and Wages. PRT considers "travel generated employment" to be employment in 9 sectors of the Standard Industrial Classification. Some of the sectors (e.g. Hotels and Motels) are obviously tourism oriented, while others (e.g. food stores, gasoline service stations) serve both local

Table Five
U.S. Census Measure of "Second Homes"

TABLE 5: U.S. CENSUS MEASURE OF "SECOND HOMES"						
			1970*	1980*	1990**	
Beaufort			286	452	6602	
Charleston			1125	797	4364	
Colleton			42	643	861	
Georgetown			568	2172	1714	
Horry			4556	15020	19951	
Jasper			12	89	147	
STATE			10369	32261	49843	
Source: US Census of Population						

*"Vacant Units, Seasonal and Migratory." In 1970 and 1980, a unit in a resort area which is used only occasionally throughout the year is considered a year-round unit. Includes migrant worker units.

**"Vacant, held for seasonal, recreational or occasional use." Includes time-share units. Does not include migrant worker units.

Table Six
Total Travel Expenditures

TABLE 6: TOTAL TRAVEL EXPENDITURES (000)									
							Current Rank in State		
			1980	1985	1988		Travel Expenditures		
							Out of 46 Counties		
Beaufort			142413	369950	593853		3		
Charleston			216075	416759	736227		2		
Colleton			25028	33880	47036		12		
Georgetown			31219	37689	73056		10		
Horry			777548	1079940	1587257		1		
Jasper			29593	39656	42083		13		
STATE			2092607	3385660	4623074				
Source: SC Department of Parks, Recreation and Tourism									

and tourist markets. Yet there are other sectors that experience some direct tourist spending (e.g. restaurants and bars, other retail stores), so that it cannot be said that the PRT figures overestimate tourism employment. For 1988, travel generated employment in the coastal counties was estimated at 67,796 jobs. As with the expenditure data, travel employment is highest in Horry County, with 36,389 jobs.

The South Carolina Employment Security Commission generates a data series on employment in "travel, tourism and entertainment." (Table 7) It takes a more generous view of travel employment, counting 19 SIC categories, and assigning travel to all employment in such sectors as real estate and eating and drinking places. It is surely an overestimate of direct tourism-related employment, although it does not count the considerable amount of employment created when tourism-generated incomes are respent in the local economy. By the Employment Security Commission's measure, travel, tourism and entertainment generated 130,760 jobs statewide, of which 81,500 were in the coastal counties.

There has been much discussion about the types of jobs created by tourism. Table 8 shows the distribution of wages (1990) by occupation for two of the central components of the tourism industry, hotels and amusement and recreation services. Average wages were above the legal minimum wage (which at that time was $3.80 per hour) for all employment classifications except amusement and recreation attendants and for waiters, waitresses and dining room helpers. The latter, and possibly some of the former, obtain part of their income as tips.

The data show that there are indeed some higher-paying jobs in tourism (e.g. accountants, purchasing agents, and general and financial managers, all of whom earn on average more than $15 per hour.) But the occupational classes employing the largest numbers of people in tourism are concentrated on the lower end of the wage scale. For example, hotel maids and housekeeping cleaners average only $4.65 hourly, hotel desk clerks $5.49 and gardeners and groundskeepers (mainly at golf courses) $6.03. Full-time, full-year employment at these wages would produce gross income, before deductions, of only $9000-12,000 per year. This compares quite unfavorably with manufacturing, where the statewide weekly wage (1990) averages $449 (or over $22,000 on a full-year basis.) Much of the employment in coastal tourism, moreover, is not year-round.

Differences in the industry mix among South Carolina's counties are reflected very clearly in data on average weekly wages (Table 9). Nearly all of the high wage counties have a high proportion of manufacturing employment, while the coastal, tourism-oriented, counties rank much lower in average wages. None of the six coastal counties is in the top ten in terms of average wages, and two counties (Horry and Jasper) are close to the bottom.

Government Revenues. Tourism generates revenues for state and local government in a variety of ways. Most tourist purchases, including lodging, meals and most retail purchases, are subject to sales tax. Tourists also pay taxes on gasoline and alcohol, while tourism enterprises and employees are subject to individual and corporate incomes taxes, employment taxes and property taxes. For fiscal 1990-91, travel and tourism was estimated to have generated $251 million in state taxes and $82 million in local taxes, for a total tax revenue of $333 million.

South Carolina levies a 2 percent accommodations tax on all rentals of less than 90 days. Thirty percent of the revenues are earmarked for promotional advertising, while the remainder is devoted to services and facilities for tourists. In 1990-91, this tax raised $17 million, of which $12.2 million came

Table Seven
Travel, Tourism and Entertainment: Annual Average Employment

TABLE 7: TRAVEL, TOURISM AND ENTERTAINMENT--ANNUAL AVERAGE EMPLOYMENT												
					1975			1985			1989	
SIC CODE	INDUSTRY				State	Coastal		State	Coastal		State	Coastal
Direct Statewide												
472	Arrangement of Passenger Transportation				100	40		720	370		1070	430
70	Hotels, Camps and Other Lodging Places				11920	5920		19700	11240		23850	13820
79	Amusement and Recreation Services				5060	2000		10530	4790		13330	5220
84	Museums, Art Galleries, etc.				70	50		510	220		900	380
56	Recreational and Utility Trailer Dealers				80	30		160	80		170	60
9	Fishing, Hunting and Trapping				70	60		50	40		40	40
78	Motion Pictures				660	100		1360	440		2670	790
41/45	General Transportation				1960	456		2890	672		4510	1040
Direct Geographic												
53	General Merchandise Stores				8060	6160		9300	7080		11750	8900
54	Food Stores				4960	3960		9110	7610		10300	8530
5947	Gift, Novelty and Souvenir Shops				610	290		1450	750		2140	1260
65	Real Estate				2390	1960		6260	5560		7300	6510
734	Services to Dwellings				720	460		2660	1720		3550	2360
736	Personnel Supply Services				380	320		1240	1180		2400	1900
154	General Building Contractors (nonresidential)				3550	1900		4420	2960		3950	2020
16	Construction, Other Than Building Construction				1660	930		2950	1970		3380	2450
58	Eating and Drinking Places.				12270	7270		31420	20230		39450	25790
TOTAL ANNUAL AVERAGE EMPLOYMENT					54520	31906		104730	66912		130760	81500
Source: SC Employment Security Commission												

Table Eight
Wages By Industry and Occupation

TABLE 8: WAGES BY INDUSTRY AND OCCUPATION - 1990

Source: SC Wage Survey

SIC 70: Hotels, Rooming Houses, Camps and Other Lodging Places

Occupational Title:	State Avg.Hourly Wage
Accountants, Auditors & Budget Analysts	15.32
Administrative Services Managers	12.93
Amusement and Recreation Attendants	4.58
Baggage Porters and Bellhops	4.03
Bartenders	4.19
Bookkeeping and Accounting Clerks	7.19
Cashiers	5.14
Computer Operators, excluding Peripheral Equipment	6.74
Computer Programmers	12.92
Cooks, Restaurant	5.80
Dining Room and Bartender Helpers	4.46
Electricians	13.81
Engineering, Math and Science Managers	16.01
Financial Managers	21.90
First Line Supervisors, Mechanics	8.38
Food & Beverage Preparation Workers	4.51
Food Service and Lodging Managers	9.59
Gardeners and Groundskeepers	5.37
General Managers and Top Executives	20.17
Guards and Watch Guards	6.94
Hotel Desk Clerks	5.49
Hotel and Motel Housekeepers	4.70
Janitors and Cleaners, Excluding Maids	4.47
Laundry and Drycleaning Machine Operators	4.53
Maids and Housekeeping Cleaners	4.65
Maintenance Repairers, General	6.24
Marketing, Advertising and Public Relations Managers	11.75
Mechanic and Repairer Helpers	11.03
Payroll and Timekeeping Clerks	7.52
Personnel, Labor Relations Specialists	9.08
Personnel, Training, Labor Relations Managers	11.10
Purchasing Agents & Buyers	15.78
Purchasing Managers	11.40
Receptionists and Information Clerks	5.58

SIC79: Amusement and Recreation Services

Occupational Title:	State Avg.Hourly Wage
Accountants, Auditors & Budget Analysts	12.18
Administrative Services Managers	13.72
Amusement and Recreation Attendants	4.25
Bartenders	4.71
Bookkeeping and Accounting Clerks	7.08
Cashiers	7.21
Child Care Workers	4.31
Computer Operators, excluding Peripheral Equipment	8.87
Computer Programmers	11.49
Cooks, Restaurant	7.53
Data Entry Keyers, except Composing	7.08
Dining Room and Bartender Helpers	3.92
Electrical and Electronic Technicians	10.17
Financial Managers	15.38
First Line Supervisors/ Mechanics	12.59
Food & Beverage Preparation Workers	4.55
Food Service and Lodging Managers	11.40
Freight, Stock and Material Movers, Hand	6.00
Gardeners and Groundskeepers	6.03
General Managers and Top Executives	28.57
Guards and Watch Guards	9.06
Hotel and Motel Housekeepers	5.13
Janitors and Cleaners, Excluding Maids	5.00
Machinery Maintenance Workers	5.88
Maintenance Repairers, General	6.82
Marketing, Advertising and Public Relations Managers	12.85
Mechanic and Repairer Helpers	7.55
Payroll and Timekeeping Clerks	7.67
Personnel, Training, Labor Relations Managers	13.29
Purchasing Agents & Buyers/	12.87
Receptionists and Information Clerks	5.41
Retail Salespersons	6.00
Secretaries	8.67
Sports Instructors and Coaches	9.85

TABLE 8, cont'd

SIC 70: Hotels, Rooming Houses, Camps and Other Lodging Places

Occupational Title:	State Avg.Hourly Wage
Retail Salespersons	5.56
Secretaries	7.17
Stock Clerks	4.90
Supervisors, Administrative Support Occupations	9.62
Systems Analysts, data Processing	12.59
Traffic and Shipping Clerks	6.68
Typists	5.07
Typists, Word Processing Equipment	6.83
Waiters and Waittresses	3.25

SIC79: Amusement and Recreation Services

Occupational Title:	State Avg.Hourly Wage
Stock Clerks	6.03
Supervisors, Administrative Support Occupations	10.01
Systems Analysts, data Processing	13.71
Traffic and Shipping Clerks	8.17
Typists	5.55
Waiters and Waittresses	4.93

from coastal counties. A 4 percent admissions tax is levied at tourist attractions, generating about $10 million statewide.

Government revenues are, of course, offset by expenditures. Bill Lawrence, director of PRT, points out that "The [tourist] from Ohio doesn't need our schools, but he pays the same sales tax I do when he goes to the beach." Although tourists do create some demands on public agencies--for example state parks, highways, and public safety services--it is likely that the costs are far below the tax revenues generated.

Table Nine
Counties Ranked By Average Weekly Wage

TABLE 9: COUNTIES RANKED BY AVERAGE WEEKLY WAGE – 1990

		WAGE ($)
1	AIKEN	501
2	CALHOUN	477
3	FAIRFIELD	436
4	GREENVILLE	417
5	OCONEE	401
6	DARLINGTON	401
7	RICHLAND	398
8	YORK	394
9	SPARTANBURG	393
10	BERKELEY	392
12	CHARLESTON	377
19	GEORGETOWN	355
32	BEAUFORT	328
34	COLLETON	311
43	HORRY	291
46	JASPER	265

Table Ten
Illiteracy Among Coastal Residents

TABLE 10: ILLITERACY AMONG COASTAL RESIDENTS - 1990							
Functional Illiteracy--Persons over 25 with less than 5 years of elementary school.							
		TOTAL	% TP*		BLACK	% TBP**	
Beaufort		1942	6.1		1702	18.2	
Charleston		8152	5.5		6449	14.0	
Colleton		1596	8.9		1218	17.0	
Georgetown		2568	11.3		1830	21.1	
Horry		3487	6.1		1607	16.2	
Jasper		1084	14.2		918	23.1	
STATEWIDE		123232	7.1		68912	15.3	
*% of Total Population			**% of Total Black Population				
Source: SC Dept. of Education, Educational Data Center							

CHAPTER THREE

Issues and Opportunities for Tourism in Coastal South Carolina: A Policy Brief

Tourism as Sustainable Development

Tourism, whether in coastal South Carolina or anywhere in the world, has proven to be a complex and often problematic industry. Tourism can create large numbers of jobs, promote overall community growth, generate significant municipal and state tax revenues, and support retail and cultural facilities enjoyed by locals as well as tourists. Yet tourism also can cause uncomfortably rapid social change, bias the employment structure toward low-wage jobs, and create housing, transportation and environmental problems. Tourism has been called "a double-edged sword—able to save the day if skillfully wielded, but liable to cut one's leg off if handled carelessly." (Glick, 1991)

In searching for ways to increase the diverse benefits from tourism, and to avoid its many problems, it is useful to consider tourism within a framework called "sustainable development." This way of looking at development was originally created as a way of integrating environmental considerations into Third World economic development. It has recently been widely adopted as a paradigm to guide future development in countries at all levels of income and industrialization. The sustainable development concept offers a way to integrate multiple goals in a single framework, helping garner the support of developers, environmentalists and advocates of social equity.

Sustainable development may be characterized as economic development that achieves the following goals:

—high per capita consumption sustainable for an indefinite period, which implies, among other things, an optimal rate of resource use over time;

—equity in the distribution of benefits and costs;

—environmental protection, including protection of biodiversity, visual amenities, and the continuing functioning of complex natural systems;

—participation of all sectors of society in decision making.
(Adapted from Ascher and Healy, 1990).

These four goals substantially encompass the needs and aspirations that South Carolinians expressed in the interviews conducted as part of the preparation of the overview paper. There was almost universal interest among those interviewed in continued economic growth, yet there were fears that present patterns of tourism development might ultimately create such overuse of the resource that visitor growth would slow. South Carolinians, particularly long-time coastal residents, expressed dissatisfaction with the distribution of tourism's benefits and burdens, including jobs, taxes and access to resources such as beaches and fishing grounds. Environmental protection was very frequently mentioned, with some coastal residents unhappy with congestion and visual blight, some with threats to wildlife habitats, others with development-induced pollution. The issue of participation was of importance to many of those interviewed, but of particular concern to black citizens, who in many cases have felt powerless in the face of rapid land use and economic change.

Steps Toward Sustainable Development

Commitment by all concerned parties to making coastal tourism better fit the sustainable development model offers a way out of divisive pro-tourism/anti-tourism thinking. Four general steps might be taken to move South Carolina's coastal tourism toward sustainability.

Step One: Defining and Understanding Tourism

The first step toward making tourism sustainable is to define what tourism is. Many of the impacts that South Carolinians attribute to "tourism" are at least in part caused by three related, but not identical, activities. These are (a) the building of second homes; (b) increase in permanent, economically active, population, and; (c) increase in permanent population of retirees.

As was pointed out in chapter two, it is very difficult to separate these activities from the existing statistical record. They are also closely related functionally. For example, many owners of second homes, as well as retirees, first came to South Carolina as tourists, and second homes are sometimes converted into full-time residences after their owners retire. Many of the permanent, economically active, residents are able to live on the coast only because of the jobs that tourism and property development provide. And many second homes are rented part of the year to tourists.

Despite these interconnections, the impacts of each activity are somewhat different. Tourism tends to be seasonal and concentrated in time and space. Localized problems of crowding are often due to tourists—on highways and on the beach, for example, or on the sidewalks of Charleston. Some of the facilities serving tourists produce visual blight or contribute to a sense of cultural homogenization. On the other hand, tourists pay large amounts in taxes (particularly accommodation and sales taxes) and require few public services. Tourists support businesses and festivals enjoyed by the entire community.

Second homes also tend to have a positive fiscal impact—their owners pay ad valorem property taxes, but do not have children in the public schools. But second homes probably have less economic impact, in terms of jobs and local spending, per unit of environmental impact than do tourism facilities. The building of the units creates construction jobs, but owners frequently do their own cleaning and maintenance and bring their supplies in from elsewhere.

New permanent residents, whether in the labor force or retired, contribute to the economic stability of the community. They purchase goods and services throughout the year, and they support a much wider range of businesses than do tourists or second-home owners. Few of the latter purchase an automobile locally, for example, and many do not even purchase the local newspaper. Unlike tourists and second-home owners, permanent residents pay state income taxes. But permanent residents make a variety of demands on public services. In many cases, the marginal cost of building new facilities to serve the new residents are far higher than the average costs of serving existing residents. In this case each new permanent resident is a net fiscal drain. (The question of whether population growth has positive or negative fiscal impacts in a given locality is quite complex. The net fiscal impact of a given addition to the population depends on the population growth rate, the interest rate and payback period on municipal bonds, the cost and economic life of infrastructure, and the presence or absence of excess capacity in expensive capital facilities. (See Snyder and Stegman, 1986).

Retirees pose special issues. Although most move to South Carolina active and in good health, they will eventually require sophisticated medical services, emergency response systems, and nursing care. Many of these systems are not adequately developed along the coast. In some cases, medical and nursing care will exhaust the resources of retirees and will have to be provided at state or local expense.

The differential impacts of tourism, second-homes, and permanent settlement along the South Carolina coast can be described in general terms, but they have not yet been measured. A prerequisite to better policy toward tourism is to define it more precisely and to compare its costs and benefits quantitatively with those of related activities. Detailed information from the 1990 Census, due to be released in mid-1992, will provide a timely opportunity for the necessary studies.

One can also distinguish several varieties of tourism, even in its more limited definition. Principal types of tourism along the South Carolina coast include:

—golf tourism
—water-oriented tourism, including beach tourism and boating
—historical/cultural tourism
—nature tourism
—business meetings and conventions
—group sightseeing and shopping tourism

As with the distinction between tourism and other forms of coastal growth, the types of tourism have considerable overlap. Many of the coastal plantations—Litchfield is only one example—emphasize both golf and water activities; a few, like Kiawah, offer both sports activities and a certain amount of nature tourism. Business meetings come to Charleston so that participants can enjoy shopping and historic/cultural activities.

But each of these types of tourism makes somewhat different demands on the natural environment and the social fabric. For example group bus tours, increasingly popular with the elderly, provide significant revenues for some businesses, but can lead to severe congestion if adequate parking facilities are not provided. Golf courses draw in high income tourists, but have the potential for producing water pollution as a result of run-off of agrichemicals.

Tourism types also differ in their seasonality. Beach tourism is highly concentrated in June, July and August; golfing, nature tourism and group sightseeing draw tourists well into the spring and fall. Business meetings and conventions tend to avoid the summer months, and often prefer the low season, when employees are not on personal vacation and when accommodations are available at the lowest prices. It is important to differentiate, and to understand, each type of tourism before undertaking the next step, developing the right tourism mix.

Step Two: Developing the Right Mix

Retirement settlement and second homes, golf tourism and nature tourism, cultural tourism and boating: each has a place along the South Carolina coast. But at any given time, one type of activity may have expanded beyond its social, fiscal, or environmental "carrying capacity" while others may be undeveloped. At present, for example, the potential of the coast for nature and cultural tourism seems quite undeveloped as compared with its golf potential. Similarly, the tourist/retiree ratio appears much higher in Myrtle Beach than in Hilton Head. Beach sites in many areas appear fully developed, while attractive estuarine and inland sites are

unexploited. Rather than asking the polarizing and often unhelpful question: "Do we want more development?," South Carolina's coastal communities might better debate "Would we rather have another golf course, or a state park? Would we rather have more retirees or more light industry? Would a large campground or a second home community be better for our economy and environment?"

Achieving the right seasonal mix of tourism is also important. One of tourism's greatest weaknesses is its seasonal nature. By December, many hotels and resorts are either shut down or their staffs drastically reduced, leaving many workers in the cold. Pricing, group bookings, convention bookings, and special events are a few of the major ways businesses and state and local government officials are seeking to expand the tourism season into the "shoulder seasons" of spring and fall, and eventually into winter. "Leveling out the peaks and valleys of the tourism season is one of our major goals," said John Curry, Chairman of the Hilton Head Island Visitors and Convention Bureau.

One of the most promising ways to expand the shoulder season is through conventions. But to draw conventions, the coast must be better served by convention-size hotels. Many conventions draw more than 1,000 people. Yet the largest hotel in South Carolina—the 525 room Hyatt Regency on Hilton Head—can not even handle a medium-sized convention. So cities all along the coast are vying for a convention hotel. Myrtle Beach almost landed a convention-size Marriott two years ago, but those plans were scrapped when the chain was acquired by a British company.

Another requirement for expanding the convention and business meeting trade is improved air service. Currently, Myrtle Beach is served primarily by commuter airlines, but the prospective closing of the Myrtle Beach Air Force Base might provide the basis for direct air service with large jets.

Special events are another way coastal communities are attracting tourists during the off season. The largest of these is Myrtle Beach's Can-Am Days, which takes place in March and draws thousands of Canadians to the Grand Strand.

Step Three: Creating a Stake in the Tourism Resource

In a widely quoted article, which appeared in *Science* in 1968, ecologist Garrett Hardin described what he called "the tragedy of the commons." In it he describes an area of grazing land, used in common by all the residents of a village. Each villager has an incentive to put as many grazing animals as possible on the common pasture so as to maximize his or her profit. Each villager knows that if he does not do so, a neighbor will take advantage of the available forage. The "tragedy" is that the entirely rational pursuit of private profit will ultimately lead to too many animals on the pasture and the ultimate, perhaps permanent, degradation of the resource. Private rationality is transformed into public folly.

A related problem is that there is no incentive for anyone to invest or to improve the pasture. If any single villager paid to improve the water supply, for example, most of the benefits would accrue to other villager's grazing animals.

Tourism resources may be seen as very similar to Hardin's common pasture, and are subject to the same "tragedy" of overuse and underinvestment. This is particularly true of what Jafari (1982) calls "background tourism elements" (BTEs). BTEs are "the reason for which the consumer-tourist travels." They may be natural, socio-cultural or man-made. In the South Carolina context, they could include waterfront views, scenic drives, ensembles of historic buildings, or the atmosphere of a downtown craft market or a street festival. Jafari argues that the goods and services provided by the tourist industry are "only incidental

interests of the tourist" and are "the result of the magnetism of the BTEs." The BTEs are, in effect, the grazing land on which the tourism industry feeds.

Says Lisa Ritsch of Main Street Beaufort, "It's not Wal-Mart that brings tourists to Beaufort—it's downtown Beaufort." Yet Wal-Mart, and the non-descript motels and restaurants lining Highway 21, reap economic benefits from the tourist drawn by the downtown. Restorations, museums, parks and festivals all produce increased revenues for a variety of firms in their community.

It is alarmingly easy for tourism policy to emphasize the health of the "industry" and to neglect the health of the BTEs on which it is based. Low Country Council of Governments director Buddy Thompson referred to a line of roadside trees, removed as part of a road-widening project. "People come here, they visit here, for those 200-year old oaks. But we strip them out." Similarly, along Highway 61, outside Charleston, where tourists are drawn to Drayton Hall, Magnolia Plantation and Middleton Place Gardens, spreading urbanization is diminishing the scenic qualities of the drive. Environmental BTEs can also be destroyed piecemeal, as in the case of sewage runoff that pollutes shellfish beds or riverbank erosion caused by speedboat traffic.

An important step toward making coastal tourism sustainable is to create a sense of public responsibility for the fundamental assets of the coast—its scenery, its wildlife, its waters, its historic assets. Small investments in protecting existing BTEs and developing new ones can produce large, though diffuse, benefits for the community.

Step Four: Job Ladders and Entrepreneurship

During the last twenty years, South Carolina has built a two-tier society along much of its coastline. Its dividing lines are affluence and poverty, education, and race. The tourism industry is not solely responsible for this division—indeed much of the social and economic chasm is associated with the rapid growth of the more affluent segment of the permanent resident population. But tourism can be said to have started the process, and tourism has not only a moral responsibility, but a self-interest in addressing the problems that a dualistic society has created.

The self-interest lies in the fact that tourism demand is unusually sensitive to tourists' perceptions of their personal safety and comfort. Tourism is a highly competitive industry, and tourists can easily substitute one destination for another. Experiences in many parts of the world have demonstrated that relatively few incidents of violence or problems with crime, drug abuse, or simply a hostile local population can cause tourism to literally evaporate. For example, tourist perceptions of crime and hostility severely damaged tourism on St. Croix in the 1960s and Jamaica in the 1970s and threaten to do the same at present in Rio de Janeiro and other South American capitals. A situation in which a large segment of the population in a tourist area is impoverished, and increasingly alienated, is unhealthy for the industry as well as for the community.

Tourism has much to contribute to the solution of these problems. A healthy tourism sector can create opportunities for upward mobility among the local population in two ways: by creating career ladders for employees and by providing opportunities for small-scale entrepreneurship.

Career ladders are the key to more constructive relationships between the industry and its workers. The hotel and restaurant industry has tended to regard its workers as interchangeable parts, subject to rapid turnover and easily replaced. Experienced—and hence somewhat more expensive—workers are considered a liability rather than an asset. One participant in our Beaufort focus group captured the

corrosive effect that such an attitude has on the workers: "The first thing an outside manager [brought in to cut costs] does is to replace the person who gets $5 or $6 an hour making salad with one who gets $3.50 an hour and can learn the job in a day." When promotions are available, the establishments often look outside their own labor force—and often outside the community itself. This may make sense for the individual firm, but it is a sure route to alienation and despair for an important part of the community.

Firms are prone to complain about the lack of education and motivation among their workers. Indeed, there is a high rate of illiteracy along the South Carolina coast, and school drop-out rates are high. Yet the community colleges seem to have tried hard to address the manpower needs of the tourism industry and a number of specialized training courses are available at very low cost. We have heard the complaint, too frequently to be ignored, that the job structure and hiring practices of the tourism industry simply provide no incentive for workers to take advantage of educational opportunities.

"The job structure [in tourism] gives no incentive for further education," said one participant in our Beaufort focus group. "You can flip hamburgers with a sixth grade education. If your father doesn't own a business, you have to go elsewhere to find a job." If coastal tourism is to be sustainable, the industry must give some hard thought to developing career ladders for its employees, encouraging professionalism and long-term commitment to the industry.

Another route to upward mobility among the coastal population is entrepreneurship. Many existing and potential tourism enterprises are quite small and require neither enormous amounts of capital nor sophisticated skills. Entrepreneurial business creation is not for everyone—nor even for many. But entrepreneurs have a stabilizing effect in the community, precisely because the energy and capital they have invested in the business ties them to the community's future. They become the role models and the local leaders. A few of them are able to grow small enterprises into larger ones, creating career ladders for others.

Initiatives for Change

One of the hardest tasks in planning and policymaking is to turn general guidelines into specific actions. South Carolina is particularly fortunate in having a large number of imaginative projects or initiatives that show promise of moving the state's tourism sector in the direction of sustainable development. Some of the projects emphasize protection of nature, others creation of entrepreneurial opportunities, others preservation of distinctive cultural resources. Many of the projects fulfill multiple objectives. They are presented here, not in the sense of offering an endorsement for each specific detail, but as a menu of concrete approaches to sustainable tourism development.

CULTURAL PRESERVATION: St. Helena Island Gullah Center

Joe Mix is a proud descendant of Polish immigrants to Chicago. So it is not surprising that the owner of Island Outfitters in Beaufort is at the forefront of efforts to preserve and reinvigorate the Gullah culture in Beaufort and its surrounding Sea Islands. To Mix and a group of other Beaufort business leaders, all cultures share common elements that make them worth preserving and make them worthwhile as tourist attractions. Ethnic groups in other areas, such as the Italians in north Chicago, are able to live their cultures and at the same time make a living from them. So why not also in Beaufort? asks Mix.

"We also have a unique culture. But black organizations at universities in Mississippi and Alabama are becoming the repositories for the black culture. This is slipping away from us," he said.

Beaufort's well preserved historical character is already a major draw for tourists. Mix would like to preserve and strengthen the area's Gullah culture to attract even more people. He is working with representatives from the South Carolina Sea Grant Consortium, Clemson University and the University of South Carolina at Beaufort. The group is pursuing several projects, including a Gullah Center on St. Helena Island. The center, perhaps to be based at the existing Penn Center (the first school for freed slaves in the United States) would house businesses relating to each of several elements common to all cultures. For instance:

*Worship. Black gospel groups in religious garb would hold regular performances.

*Food. Gullah foods would be sold in restaurants and in a farmers' market.

*Art and Literature. Black artists, some of whom are already selling their works at good prices, would be invited to demonstrate and sell their art. Storytelling sessions by Gullah people would be held.

*Hair styling. Parlors would be opened where black tourists could take home authentic African hair styles.

*Clothing. African clothing would be handmade from locally grown and dyed cotton.

*Cottage industries. Activities such as sewing and basketmaking would provide products for sale to tourists.

In addition to the Gullah Center, the Beaufort group is exploring the possibility of establishing a self sustaining working plantation on St. Helena Island. The plantation would be run by native islanders who would produce products that could be sold to tourists or which could be further manufactured in a traditional manner. Tours would describe the plantation system that fueled the coastal economy for hundreds of years.

CULTURAL PRESERVATION: Freewoods Farm

O'Neal Smalls, a black law professor at the University of South Carolina, wants to create a living historical farm museum near Myrtle Beach. The farm would replicate the small family farm that was operated by thousands of rural South Carolinians, including many blacks, during the period between the Civil War and the early 1900s.

Smalls envisions a project called Freewoods Farm, located on 40 acres he and his family members own near Myrtle Beach. "This would be a new and different kind of attraction in Myrtle Beach, an attraction that would teach history and preserve rural culture," he said.

Freewoods Farm would be a working farm consisting of a farmhouse, grist mill, smokehouse, and blacksmith shed as well as barns for livestock and fields of crops like tobacco, tomatoes, okra and rice. Tourists would see and interact with the farm assistant in a variety of activities, including making syrup, soap, lime and sausage; smoking hams; cultivating crops; and caring for animals.

The second component of the project would be a Main Street, consisting of small shops and restaurants near the farm. The architecture of the buildings would replicate the small South Carolina towns of

1860-1900. "Main Street was the only place where all residents, black and white, crossed paths. It was the nerve center of rural America," Smalls said. The town buildings would be leased to businesses to provide services and food to the visitors and the money generated would supplement the farm income.

Smalls sees a number of advantages to the project. For one, it would bring about 75 jobs and immeasurable pride to the Burgess community, an economically depressed but socially vital area ten miles southwest of Myrtle Beach.

According to Smalls, Freewoods Farm would give Myrtle Beach an attraction unlike anything that now exists there. It would also help move the flow of tourism and development inland. While most visitors would probably come during Myrtle Beach's peak season, Smalls is planning a variety of off-season activities so that most jobs at Freewoods Farm would be year-round. He envisions farm festivals like Pumpkin, Watermelon, and Harvest festivals, as well as a major agricultural exposition in early spring that could draw thousands of students and companies involved in all phases of agriculture.

Smalls has forged partnerships with Clemson University and South Carolina State University, both of which have conducted research projects to document the farming techniques and foods of the period Freewoods Farm would emphasize. He is also working with a Columbia real estate company to market the Farm, has garnered PRT support for promotion, and is seeking investors and financing.

Freewoods Farm is particularly aimed at attracting the growing number of black tourists visiting the South, a market increasingly recognized by state tourism authorities. In South Carolina, PRT promotes three black-oriented festivals, the Jubilee Festival in Columbia, the Moja Arts Festival in Charleston, and the Heritage Celebration in St. Helena Island. Tourism officials say that black family reunions are on the upswing, as are bus tours made up of black choirs and church groups from the North. Many tourists already stop at Atlantic Beach, a black-oriented beach near Myrtle Beach. Smalls believes Freewoods Farm would be the next logical step on the tour. Freewoods Farm exemplifies a type of tourism that promotes cultural heritage and offers a chance to cater to a growing market segment.

LANDSCAPE PROTECTION: From Highways to Parkways

Highway transportation has been a continuing problem along the South Carolina coast. Although Interstate 95 speeds tourists into South Carolina, and Interstate 26 provides easy access to Charleston, much of the coastal highway system is antiquated, congested and dangerous. Coastal highways are also increasingly unattractive, with rampant strip development and uncontrolled commercial signs converting formerly rural areas into zones of sprawl that tourists rush through on their way to more attractive destinations.

Two new initiatives in South Carolina promise to combine transportation improvements with better planning for roadside land uses. The Palmetto Conservation Foundation is involved in both projects, which are variants of the "scenic parkway" idea, a concept successfully implemented in the Appalachians (Blue Ridge Parkway) and in southeastern Virginia (Colonial Parkway).

The first project involves Highway 17, the primary route from Charleston to Beaufort and Hilton Head. The South Carolina Highway Department has plans to widen this highway, which crosses the heart of the ACE Basin, 350,000 acres of mostly undisturbed wetlands and wildlife habitat. The ACE Basin is currently the site of a nationally recognized conservation effort by state and federal agencies and the Nature

Conservancy. Notable conservationists such as Gaylord Donnelley and Ted Turner have agreed to conservation schemes for large properties they own in the basin. But plans to widen the highway have created a potential conflict between the dual goals of transportation efficiency and land conservation.

The ACE Basin Scenic Highway is an effort to reach a compromise between transportation and conservation interests. Headed by the Colleton County Chamber of Commerce, and with technical assistance from the Palmetto Conservation Foundation, plans have been made to leave the corridor adjoining the improved highway in its natural state by limiting ancillary development, mandating vegetative setbacks, and controlling signs and curb cuts. Scenic turnouts and an interpretive center are also part of the plan.

A second project is the Sea Island Scenic Parkway, in Beaufort County. The proposed widening of U.S. Highway 21 from Beaufort to Fripp Island threatens the sensitive Sea Island culture of Lady's and St. Helena Islands. Improvements might adversely affect such resources as historic Frogmore, the Emancipation Oak, and Penn Center. The Sea Island Parkway effort seeks to not only limit the extent of widening of the highway, but also to promote the corridor as a recreational amenity by installing bike and walking paths. If implemented correctly, transportation efficiency can be improved while building community cohesiveness.

Scenic highways and parkways have the potential to not only protect sensitive resources but to add an additional tourism amenity. "Driving for pleasure" is among the most desired leisure activities and can add considerably to an overall tourist experience. One can imagine, for example, the added experience of a traveler driving from Historic Charleston to Hilton Head via the natural beauty of the ACE Basin Scenic Highway.

Much more controversial, and still unresolved, is the problem of improving access from Interstate 95 to the Myrtle Beach area. Transportation improvements would not only benefit tourists, but would ease the commute of tourist industry workers, many of whom live far inland. Proposals have ranged from a standard interstate highway to a "Carolina Bays Parkway." All have foundered on the issue of wetlands.

ENVIRONMENTAL PRESERVATION: Nature-Based Tourism

A growing number of tourists are looking for "back to nature" experiences that let them explore and appreciate natural resources. With its rich and varied coastline and abundant wildlife resources, South Carolina is well positioned to develop this new type of tourism, dubbed ecotourism or nature-based tourism.

For instance, South Carolina's barrier islands provide wonderful settings for interpretive nature walks and discoveries. The Ashepoo, Combahee, Edisto and Black rivers offer great recreation, including canoeing, camping and viewing wildflowers and fauna. Birding opportunities abound in South Carolina, which has 20 percent of the coastal wetlands on the entire East Coast, providing nesting or migratory habitats for an incredible variety of birds.

Margaret Davidson, director of the South Carolina Sea Grant Consortium, is working closely with the Regional Resource Development Institute at Clemson University to inventory the types of nature-based tourism businesses in South Carolina and explore opportunities for others. A recent report by the Institute (McConnell, 1990) identified about a dozen businesses in the coastal region that offer a wide range of ecotourism activities, including harbor tours, beach walks, wilderness programs, guided canoe trips and jeep island tours.

According to Davidson, the nature tourist is the kind of person South Carolina should want to attract. "Look at birders," she said, "Birders have money. They like rustic settings, and they pack out their trash. Aren't they the ideal tourist?" Davidson said that there is funding available to set up businesses that might cater to nature tourists through the federal offices of the Economic Development Administration and the Small Business Administration.

Becki Brantley, director of Camp Baskervill, sees dozens of other nature tourism opportunities. "I can't think of anything more wonderful than spending a day with one of the local crabbers. A tourist could go out with the crabber in his boat and cast pots with him. You would hear some wonderful stories about the history and people of the area." Brantley had other suggestions: shrimpers taking tourists on guided tours; a local artisan demonstrating the nearly lost art of making tabby, a construction material that was used to build many plantation homes; artisans showing tourists how to make bateaux or fishing nets; and natural history or archeology buffs leading guided walks along beaches and in maritime forests.

One ecotourism project already underway is the Edisto River Canoe and Kayak Trail (ERCKT). The trail is a joint project of local government, the Walterboro-Colleton Chamber of Commerce, and individual volunteers, organized as the Edisto River Canoe and Kayak Trail Commission. The commission owns 16 canoes and operates canoe tours out of Colleton State Park. The commission's tours cater to groups, such as Scouts, churches and environmental organizations; a new private canoe livery caters to individual renters. An annual river festival is held in spring and there is a program for training river guides. The commission is now in the process of trying to secure conservation easements along the river so as to preserve its scenic qualities.

Jim Wescott, Executive Director of the Lowcountry and Resort Island Tourism Commission and an active ERCKT volunteer, observes that "As a result of the Edisto River Canoe Trail major sections of the Edisto have been cleaned up, we have taught ecology to lots of people, and we have done a lot for business in Colleton County." He notes that there are complements between ecotourism and other types of tourism. A Nature Conservancy group from Cincinnati recently took a trip to the undeveloped ACE basin—but stayed overnight on Hilton Head. And visitors to the Edisto have helped fill motel rooms in Walterboro.

Tourists are often fascinated with the work of scientific researchers. The Baruch Institute, a university of South Carlolina affiliated coastal research facility north of Georgetown, has a small nature center and offers tours twice a week. There would seem to be opportunities there for expansion of the tour program and for adult education courses, including the increasingly popular Elderhostel courses, which appeal to retired persons. In Beaufort, business leaders are working on plans to open a research center called the Beaufort Institute to study the impact of growth on the environment. "It would be the Aspen Institute of the East Coast, where people from all over the world could come and conduct research and communicate their results," said Joe Mix. Interestingly, the economic impact of scientific researchers and students is quite similar to those of ordinary tourists. Studies (Laarman and Perdue, 1987, 1988) of the Costa Rican research and educational facility of the Organization for Tropical Studies found that its operations generated between $1.9 and $3.4 million in direct economic activity annually, and that almost 60 percent of scientists and university course participants made subsequent visits to Costa Rica. Moreover, 69 percent claimed that they had induced others to visit the country.

NATURE TOURISM AND LAND DEVELOPMENT: Palm Key

A half hour from bustling Hilton Head, Judy and Emil Rigg are trying to create an ecologically oriented resort on a scenic piece of land bordering the Broad River. The Riggs hope to take advantage of the fact that some 35,000 vehicles daily pass the nearest exit on Interstate 95, five miles away. Most pass through quickly on their way to Florida or the North; some motorists stay overnight but spend little additional time in the area. The Riggs plan to lure potential ecotourists with roadside billboards advertising kayak and canoe trips, nature walks, and fishing excursions.

Their Palm Key development is envisioned as an inn and cottage community, with outdoor recreation emphasized. Purchasers of cottages would have the option of renting them to vacationers (or highway travellers) when not in use, or even of operating them personally as "bed and breakfast" hotels. The Riggs also plan to run Palm Key as a sort of nature-oriented country club for those who do not choose to buy residences. Members would be able to use the property for boating and other outdoor activities, and could rent cottages and campsites as needed.

ENVIRONMENTAL EDUCATION: Museum of Hilton Head Island

On Hilton Head, an ambitious museum is planned to showcase the archeology, history and natural features of the island. Chartered in 1985, the museum is located in temporary storefront quarters while trying to raise $4.8 million for a permanent building. A 3.74 acre site has already been secured, and a boardwalk has been constructed for guided and self-guided tours of a wetland habitat.

Museum programs on island ecology and history already reach more than 10,000 people annually. Particularly notable is the program of guided nature walks. Running from March through November, they bring local residents and tourists to tidepools, wetlands, the Pinckney Island National Wildlife Refuge, and the ruins of the Stoney-Baynard Plantation. During the summer, nighttime "turtle patrol" tours are offered, allowing controlled access to Sea Turtle nesting sites. The museum is likely to develop into both an important local educational resource and a tourist attraction in its own right.

ENCOURAGING THE ENTREPRENEUR: Small Business Development

The remarkable growth in business along the South Carolina coast has been glaringly lacking in one respect: minority-owned businesses. Yet small business offers a great opportunity for those who complain about being locked into dead-end, low paying service jobs. Native islanders generally have two resources available for immediate use in small business: large families and land. Several families have consolidated their land and either sold or leased parcels to gain capital for new businesses. Keeping the business within the family not only can strengthen the family unit but can also reduce the problem of high employee turnover.

Three entrepreneurial experiences stand out as ways some blacks have tried to overcome the risks of growing a small business and offer lessons for others to follow.

In 1990, Kitty Green and her family members pooled their money and opened the Gullah House restaurant on St. Helena Island. Five months later, they opened a second restaurant on Beaufort's historic Main Street. [The Beaufort restaurant closed in early 1992.] The unusual restaurants serve traditional dishes unavailable elsewhere. They also have attractive displays of moderately price Lowcountry artwork, such as sweetgrass baskets and paintings. A local basketmaker is often on hand to answer questions about her art.

Green said she and her family tapped all their savings and work long hours to keep the businesses going. She wasn't able to secure a bank loan, but she has very understanding landlords who charge her "rents I can live with." The landlords helped Green and she's helping them. In both locations, Green took over buildings that had been vacant or fallen into disrepair and spent thousands on renovations. Green is also very proud of the fact that she is able to employ other blacks and be an entrepreneurial role model in the community.

To the north, Walter Stanley, 41, and his 12 brothers and sisters have spent their entire lives on Johns Island. His father, Paul Stanley, left his children a tremendous legacy. While many blacks hesitate to relinquish their hold on their land, Stanley arranged to lease some of the family's land to a shopping center developer. The money Stanley earned from the lease enabled him to open a tire store and gasoline station that provides jobs and income for the entire family. The Stanleys work long hours but their business is doing well. Walter Stanley said he's glad the family was able to move out of farming, which also involves long hours but does not provide the rewards of the retail business.

As the Stanleys learned, leasing land rather than selling it can be an excellent option. Blacks are able to retain ownership and at the same time earn a steady income that allows them to open their own business or to ultimately develop the property.

On Hilton Head Island, Sam Bolden also chose leasing as a way to provide an income for developing a small business, in his case a construction hauling firm. Bolden, who owned some farmland along the highway that leads to the island, found his land in demand for commercial purposes. Rather than simply selling the land, Bolden engaged the services of an attorney and an accountant who provided him with the expertise needed to construct a warehouse building and negotiate a solid lease with a construction company. The project required borrowing $100,000, but through careful planning, he was able to make the most of his borrowed funds. After 30 years of profitable work, Bolden is retired from a successful business. He still owns the land and he still receives lease payments.

MARKETS FOR MICROENTERPRISES: The Beaufort Saturday Market

Millions of tourists come to South Carolina's coast with money to spend; thousands of coastal residents have the potential to provide them with goods and services. But many of the potential businesses are very small.

Downtown Beaufort has one answer—a public market in its downtown Waterfront Park. The market has actually had two incarnations. When the Park was built in 1979, a continuous craft and farmers' market was envisioned. This operated for about a year, then faded. Interestingly, several of the vendors in the original market later opened successful storefront businesses in downtown Beaufort.

In 1990, the market was revived, as a Saturday morning farmers' market. Vendors pay $5 per day to rent one of 23 stands. Products include beans, collards, squash and blueberries. There is a link with the agricultural extension service, which advises the farmers on suitable crops and planting dates. In the new market's second year, crafters were included. The market brings tourists downtown early Saturday morning and has proved to be a lively social occasion for Beaufort residents.

EMPOWERING SMALL BUSINESS: Episcopal Church Revolving Fund

As Kitty Green, of the Gullah House, learned, one of the biggest obstacles to starting a business is getting financial assistance. Tony Campbell thinks he has a solution—or at least the start of one. Campbell, a Yale-educated native of Indiana, has secured $100,000 in funding from the National Episcopal Church and is

seeking matching grants from the church's two statewide dioceses. His goal is to build a $3 million revolving fund that will be used to make loans to people who want to start small businesses.

Nationwide, only 20 percent of small businesses survive their first five years. So how does Campbell expect to convince church leaders to part with their money? By inviting them to invest in their communities through incubator type organizations that nurture small businesses through the start-up years. As these small businesses flourish, interest paid by borrowers will be used to lend money to other small entrepreneurs. Programs like the one proposed by Campbell have been successfully implemented in Delaware and Michigan and in Durham, N.C.

Campbell's creative approach to small business development stems from his frustration with watching native islanders become at odds with developers and the business community. "In the late 70s and 80s, blacks focused all their efforts on trying to stop development. They lost a battle that never should have been fought. What they should have done was tried to get involved and make the developers include them in the action," he said. The revolving fund, said Campbell, will be a strong step in that direction and will be used to support a variety of small business ventures.

TAX RELIEF: The Legislative Route

While native islanders are trying to succeed in tourism-related businesses, the tax bite is nipping away at their income. Several legislative solutions have been proposed for reducing the tax burden on people who own land but who have little income. Former state Sen. James M. Waddell, Jr. and state Rep. Harriet Keyserling have each proposed "circuit breaker" tax legislation to give relief to property owners facing skyrocketing land assessments. Under a circuit breaker, when property taxes exceed a percentage of income, the homeowner could claim a portion of property taxes from the previous year as a credit toward state income tax. If the claim exceeded the state tax due on the person's income, the taxpayer would be entitled to a refund of the unused portion of the credit.

Under one version of the circuit breaker, households with a gross income of $25,000 or more would receive no credit and the credit to any taxpayer would not exceed $250. The state revenues lost from the tax credit would be recouped by reducing the state's Homestead Exemption from the first $20,000 of a dwelling's fair market value to the first $10,000.

Another proposal is to finance property tax rollbacks by a local option sales tax. Of the six counties situated along the South Carolina coast, only Charleston has a local option sales tax. Recently its county council used the sales tax to reduce property taxes by 15 percent.

John Curry, president of Hilton Head's Visitor and Convention Bureau, has proposed that local leaders put a cap on property taxes for landowners who do not alter their existing land use. If a landowner were to switch to a land use to generate a higher income, then the owner would have to pay the difference in taxes created by the higher value.

BRIDGING THE CULTURE GAP: Training Local Leaders

One theme that emerged repeatedly in interviews done for this study was the issue of lack of enough local leaders in the black community. Some names came up again and again: Emory Campbell of the Penn Center, Tony Campbell of Camp Baskervill, Juan Byers and Morris Campbell, Hilton Head activists, and Tom Barnwell, a black developer on Hilton Head.

But that's a small group facing large problems. Both blacks and whites said in order for blacks to enjoy more of the fruits of the tourism industry, more black leadership is needed. "There's a new direction for the 1990s," said Rev. Alonza Washington, a Johns Island minister. "Blacks achieved so many things in the 1960s that we got complacent in the 70s. Then we lost a lot of what we gained...Now, in the 1990s, we realize it's up to us to get a grip. We're not yet in the promised land and we can't rest until we get there." Poor whites face similar problems—they are an important factor in tourism industry employment, yet there are few, if any, leaders who articulate their needs and concerns.

Residents of Johns, Wadmalaw and Edisto islands had pulled together in the formation of Sea Island Comprehensive Health Care, Inc. and now are ready to tackle issues such as land use and taxation. New leaders naturally emerge when people come together.

But training can help them be more effective. Camp Baskervill has recently received funding for a training program that will train indigenous people in leadership skills. "People need to know how to work within the system. They need to know how to negotiate," said Becki Brantley. "When they've mastered these abilities, they'll be much better equipped to get what they want and deserve."

In addition to training leaders, programs need to be set up--for both blacks and whites—that encourage more cultural awareness and sensitivity among diverse groups of people. This would provide a foundation for dialogue between native islanders, who feel their culture is in danger of elimination, and the wealthy transplants making new homes on the islands. It would also help dialogue between tourism employers, many of whom were dispatched to coastal South Carolina by big corporate chains, and the local workers who feel they are being exploited.

Jerry Barkie, former mayor of Hilton Head, made a move in that direction in 1991, when he established the Native Islanders Committee, a group of black residents who met with Barkie regularly to discuss their concerns about land loss, employment, education and public services. "I wanted to perceive as much as I could what their problems were and help solve them," he said.

ECONOMIC DIVERSIFICATION: Myrtle Beach AFB Redevelopment

Myrtle Beach is about to inherit 4,000 acres complete with infrastructure and even an airport. When Myrtle Beach Air Force Base is abandoned by the military in 1994, local leaders hope they will have a plan—and tenants—to occupy the grounds.

Some see the base closing as a chance to attract light industry or research and development facilities to the site. Clemson University, Coastal Carolina College, and Georgetown Technical College are exploring the possibility of building an academic center on the base. Academic courses offered at the center would be designed to fit in with the local economy—horticulture and golf course maintenance, for example. Coupe de Ville, personnel director for Waccamaw, Inc. and a member of the Myrtle Beach Air Force Base Redevelopment Committee, said the base should be used for businesses that enhance tourism. "Our niche is tourism," he said. "We have a built-in customer we can appeal to."

Others see the base closing as a chance to build a more diverse economy. For example, it has been suggested that Horry-Georgetown Technical College and Coastal Carolina College establish a school for engineering technology on the base property, where students would be trained for jobs in manufacturing.

APPENDIX I
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APPENDIX II
FOCUS GROUP RESULTS

INTRODUCTION

Tourism differs from most economic development systems in that to a greater degree than others the community is the "machine". The production of wealth is directly related to almost every aspect of community life. Community here is defined in its broadest possible sense as including the natural environment as well as the human constructs and humanity itself.

This realization was made vividly clear through the focus groups conducted by the South Carolina Institute on Poverty and Deprivation for the Palmetto Conservation Foundation. The focus groups reaffirmed and sharpened the insight drawn from the Institute's 1988 studies, and its continued involvement with the Coastal Communities Resource Network. These studies document a wide range of issues illustrating that the "community machine" is both a reality in the tourism of the area and that the machine dramatically reworks the entire fabric of life in the area.

The products of this machine are both good and bad as seen by residents of the area and the state. There is no turning back the clock, however, and the past had its draw backs of grinding poverty, political despotism, and abuse of the environment as well.

Now, however, there seems to be a broad readiness and numerous imperatives to deal comprehensively with the issues of development in Coastal South Carolina. What is lacking is an adequate tool to bring about policy and program to deal with these issues. The current political processes at the state and local levels are often piecemeal and reactive rather than pro-active. Members of the focus groups complained that these bodies move only in response to "big money". A number of local governments, however, have made impressive attempts at using an holistic approach to their problems, but they are often stymied by limited powers and fragmented jurisdiction.

What seems to be most lacking is a process to surface issues and develop broad consensus in dealing with them. State and local officials do not have available a system that helps them set clear goals and support the policies and programs these require.

It is, therefore, suggested that a process be initiated that would help coastal South Carolina to envision its future and make choices as to what directions it wishes to take. This process could equip local and state officials with guidelines in responding to proposals and pressures as well as creating initiatives.

The private sector would also benefit from clearer concepts of what the community would and would not support and how they might productively interface with the other varied interests.

What is suggested --in greater detail below-- is a "rechartering" of the economic, political and social systems of the coastal area. Not a literal rechartering, but a participatory process in which the foundations of these systems are re-examined in the light of the needs of the people, and in which goals are set for the future. The key elements in this process are (1) the preparation of a comprehensive "Coastal Charter", and (2) the establishment of a "Coastal Assembly" with the initiative of (3) representatives of the private, public, and voluntary sectors of the area.

Certainly no process will be a panacea for all the problems of coastal South Carolina, but the focus groups, and our previous research, show that there is a critical lack of "community" in the area. This lack both hurts individuals and paralyzes the decision making process at many points. The development of a Coastal Charter and Coastal Assembly, or some analogous processes, would have a healing effect and prepare the area for its maturing beyond the "boom or bust" development of its adolescence.

BACKGROUND

The South Carolina Institute on Poverty and Deprivation was asked by the Palmetto Conservation Foundation to contribute to their research into tourism and environmental issues in coastal South Carolina because of its previous involvements with the subject. These involvements include a project done by the Institute in 1988, the "Resort Impact Initiative," (funded by the Ford Foundation through the Aspen Institute) that identified the impact of tourism and resort development on the indigenous population of coastal South Carolina.

There were three (3) primary products of that initiative:

The Coastal Communities Resources Network;

The Major Issues with Policy Recommendations and Program Options (see Attachment I); and

"Five Scenarios of the Future of coastal South Carolina" with responses to the scenarios (available from the Institute upon request). The titles of the five scenarios are:

1. Apartheid South Carolina Style
2. Coastal Pastoral
3. The Midas Touch
4. Intervention Policy
5. Enlightened Self Interest

These products, and the contacts that they represent, formed the foundation for the Institute's contribution to the present study.

In addition, the Institute's Development Policy Sector is currently designing strategies regarding economic development that reaches the poor. Many of these have a direct bearing on the specific conditions in the coastal area.

The Institute has contributed its contacts throughout the coast to the Palmetto Conservation Foundation Project; consulted on the design and process of the study; designed a survey tool used primarily as a discussion starter with focus groups and conducted three focus groups; and, summarized the results of the survey; and focus group discussions.

THE ISSUES

The primary conclusions of the Institute in revisiting the subject with the Palmetto Conservation Foundation are:

1. The eight issues identified in 1988 are still quite critical regarding the indigenous population;*

2. There is a broader ownership of those issues among public officials and development interests than previously found;

3. Despite the broader understanding and consensus, the issues involved are so complex and multi-faceted that only major policy changes can address the problems and opportunities presented.

Two illustrations of this final conclusion are (1) the punitive results of current taxation policy in most areas as it impacts long term and low income property owners, and (2) the critical burden on local jurisdictions of providing services to a largely transient population while seeking to maintain some orderly community life.

** It should be noted that environmental issues where not a primary focus in the Institute's previous or current activities. To the extent that environmental changes and changes in access to natural resources affected the poor, the Institute noted these factors. The environmental impact was left largely to those who specialize in that field. These and many other issues are elaborated on below.*

THE SURVEY

The survey was designed to be used at the beginning of the focus groups to suggest a range of issues, gather information on the perspectives and perceptions of the participants, and illicit discussion on a range of issues regarding coastal development.

The survey was not intended to be a scientific instrument as the participants do not represent any given cross section of the population. Nevertheless, the results provide further documentation of the views of the focus groups in addition to the digest of their comments and discussion recorded by notes and taping. Also, the personal data collected may suggest something of the range of persons participating in the focus groups.

The tabulation of the completed surveys is included in Attachment II. The survey was first field tested November 14, 1991 with a small group at the Steering Committee meeting of the Coastal Communities Resources Network in Charleston. The items completed by that group are included in the tabulations, but considerable changes were made as the result of the field test, therefore, data is not present from this group on many of the items.

The survey was then used at the focus group meetings in Beaufort on January 8, 1992, and Conway on February 7, 1992. The list of participants at all three sites are included in Attachment III. Many of those invited to the Beaufort and Conway meetings were selected from participants in the Coastal Communities Resources Network, however, other persons were selected to increase the representation of planning and development interests as well.

THE FOCUS GROUPS

The discussions in the focus groups reflect many of the same themes expressed by the participants in completing the survey as reported above and in Attachment II. But, to describe more specifically the discussion a summary of each is provided here.

Charleston: The discussion was brief as the field the survey was added to a business meeting of the group, however, the tone was rather frustrated and hostile regarding the development issues raised by the survey. Most of the participants work very directly with the poor. Their level of disenchantment with the potential for improving conditions for low income persons in the coastal area was quite high. Most expressed no confidence in elected officials at any level (Question No. 7.2).

Their highest ratings of personal interest issues were 1.1 Employment and Job Opportunities and 1.8 Health and Well-being. There lowest ratings were 1.12 New Cultural Opportunities and 1.2 Development and Investment.

In ranking of priority for public discussion 1.1 Employment and Job Opportunities and 1.4 Education and Training were at the top.

Beaufort: This group included a broad range of professionals working in education, conservation, public administration, welfare, tourism promotion, and community development. Their discussion focused on the short comings in physical, human development and economic development planning.

Great frustration was expressed with the effort to encourage education when the bulk of the jobs available require little formal education ("flipping hamburgers"), and the better jobs go to people who are imported for the positions. It was agreed that underemployment and lack of job security seem endemic to the hospitality industry.

Concern was expressed that major employers and developers "accept no responsibility" for transportation and housing development for their workers. As a result, long commutes in pubic or private vehicles are the rule costing low income workers high travel costs and long hours (12-18 hours) away from their children. The public and the poor must bear most of the cost of any initiatives to deal with housing and transportation. Many public resources such as Community Development Block Grant funds are not available as related to these problems.

The lack of citizen inclusion in decision making processes was also a concern. On the one hand, technicians make too many decisions regarding environmental issues and there is generally a lack of land use planning.

The group had many observations about the evolution of the economic base of the area. Some observed that the area had gone from too much dependence on agriculture and seafood, to too much dependence on the military, to too much dependence on the service industry. "We skipped the industrialization phase." Now, some felt, we are being limited by environmental concerns from developing the industry needed to produce good jobs and wages. One person observed bitterly that retirees had made all their money polluting and destroying the Northeast, and now they want to live in a pristine environment without the industry that is needed.

The seasonal nature of the work results in many people depending on welfare and unemployment for much of the year. Some see this as an indirect subsidy to the hospitality industry of maintaining a low wage labor force, but others saw it as the only alternative until a more balanced economy is developed.

It was observed that "We've been discovered, and we can't go back, therefore, we've got to find ways to take advantage of the development." Suggestions were: long term leases of land; make it work for you; share in development and ownership. There were fears, however, that the base of local capital to do this is not there and that higher property taxes related to development were forcing many out of the assets they have and that traditional family values are being eroded in the process.

Conway: This focus group included a range of health care, education, social services, industrial development and community development professionals. A dominant theme expressed by all of them was disappointment with the state and local political leadership in dealing with the problems of the area. It was felt, however, that the community was so fragmented with differing interests and growing populations that consensus was virtually impossible to achieve. There is no real "community" and a lack of concerted leadership.

The dynamic growth of the area seems a major source of this problem. Each year the beach area adds enough school children to populate an entirely new elementary school --500 to 600 children. At the other end of the spectrum the senior citizens are the fastest growing segment of the population. By 2010 the population over age 55 is predicted to be 80,000.

Further, the attractiveness of the area and the supposed job potential lead a great many people to flock to the area. Often these have very few resources and end up putting a demand upon public and charitable service programs. The amount of homelessness, drug abuse and crime are very extensive but largely ignored and denied in the larger community.

There was universal concern among the participants that the area gets very few state resources to deal with its problems. Actually, the area is a "donor" to the state budget, providing far more revenues than are returned to it. This leaves the area with "big city" problems and "small town" resources. Myrtle Beach ranks as one of the state's three or four largest cities, but most of that population is non-resident and so is not counted. Very little research exists to document the numbers involved. It could be helpful in making a case for the needs of the area if substantial research was done.

Most agreed that the post secondary education opportunities in the area were very good and there is a high level of education. Most graduates, however, "end up flipping hamburgers". There is a high retention rate of graduates in the area but opportunities to use their education are severely limited in the hospitality field which has a few at the top, a lot at the bottom, and very few in between. Frustration was widely felt that it did not have to be that way expect for the greed and opportunism of many employers.

Lack of planning and zoning were cited as major problems in supporting a diverse economy for the area not solely dependent on low wage service jobs.

Regarding entrepreneurship, it was indicated that the lending institutions of the area had little expertise and no aggressive program to encourage these. Over restrictive development policies regarding wetland

--which are never wet--frustrate industrial development efforts. It was also felt that the media gives little support to recognizing new industries and balanced growth.

Balanced development of the area will be thwarted because of transportation problems as well. The highway system is overloaded, public transportation is not effective, and rail or other services for raw materials, products or people is not available. Because of the convoluted and conflict ridden decision making processes, freeway access to the area is decades away.

RECOMMENDATIONS

As indicated earlier what is suggested is a "rechartering" of the economic, political and social systems of the coastal area. Not a literal rechartering, but a participatory process in which the foundations of these systems are reexamined in the light of the needs of the people and goals are set for the future. The key elements in this process are (1) the preparation of a comprehensive "Coastal Charter", and (2) the establishment of a "Coastal Assembly" with the initiative of (3) representatives of the private, public, and voluntary sectors of the area.

1. A "Coastal Charter" could be written which holistically addresses tourism and development policy and goals in the context of the area's and state's long range interests.

2. This Charter could be analyzed and discussed for a two (2) year period by (a.) public bodies (cities, counties, regional planning councils and state agencies and governing bodies), (b.) development interests (chambers of commerce, builders, developers, development agencies), community based and (c.) voluntary organizations (churches, League of Women Voters, community centers, environmental groups etc.).

3. A "Coastal Assembly" could be convened with representatives of the public, private and voluntary sectors from each county (possibly 30-50 from each county). The Assembly would divide its work into specific categories and develop resolutions regarding policy and goals, the Charter, for the area. The results of the Assembly could be transmitted to all participating bodies for their consideration and action as well as to the Governor and the South Carolina General Assembly.

4. At least every five years the Assembly could be reconvened to review progress (or the lack thereof), revise the Charter and plan for further steps.

Another valuable tool in this process is continued research. Hopefully, with an audience for its results, all three sectors will produce helpful research. However, the initiating consortium should identify research needs and solicit resources and expertise to answer the questions. Among those questions is the impact on the total state of tourism in the coastal area and what resources are needed as well as provided through this number two contributor to the state's economy.

There is broad consensus and deep concern that the coastal agenda is of critical interest to not only the residents of the area, but also to the entire state. The vehicle of the Coastal Charter and Coastal Assembly should sharpen the issues, produce clearer consensus and result in more effective action.

ATTACHMENT I

POLICY AND PROGRAM INITIATIVES
SOUTH CAROLINA COASTAL RESORT IMPACT RESOURCES INITIATIVE
BY MAJOR THEMES

Program Initiatives	Policy Options
I. EMPLOYMENT and ENTERPRISE DEVELOPMENT	
- Job Fair Model Development to Include Research and Applicant Tracking Mechanisms	- Employee Rights Protection
- Indigenous Enterprise Development Services	- Incentives for Employer Provided Child Care and Transportation
II. EDUCATION and TRAINING	
- Coastal Community Education Consortium	- Impact Fees for School Facilities and Special Adjustment Programming for Indigenous Children
- On-Job-Site Basic Education	
- Vocational/Career Education Reform	
III. LAND LOSS and TAXATION POLICY	
- Land Loss Legal Assistance and Education Program * Land Action Committees in Each County * Legal Assistance with Taxes, Mortgages, etc. * Probate Judge and Land Official Awareness and Education Process * Professional Development Consultation Services National Religious and Other Funding Sources Are Being Contacted	- Legal Action Safeguard to Indigenous Property Owners - Enabling Legislation to Provide for Lease and Sale of Development Rights - Property Tax Circuit Breaker and Other Protections of Indigenously Owned Property from Tax Sales
IV. PHYSICAL and CULTURAL ENVIRONMENT - Access and Preservation	
- Consolidated Marketing of Indigenous Crafts	- Public Access to All Water-Ways Required
- Enhancement of current indigenous Cultural Festivals	
- Others, To Be Determined	

Continued

POLICY AND PROGRAM INITIATIVES BY MAJOR THEMES - Continued

Program Initiatives	Policy Options

V. AFFORDABLE HOUSING and INFRASTRUCTURE DEVELOPMENT

- Development of Affordable Housing Replication Models Building Homes with Indigenous Craftsmen and Self-Help
- Balanced Housing Development Edcation Project

- Establish Linkage Fees and Policies to Reduce Land Costs in order to Assure Balanced Development Including Low Income Housing
- Require Infrastructure Development to Include Indigenous Property Owners

VI. HEALTH AND WELFARE SERVICES

- Develop Community Based Health Insurance to Assure Access to Health Care Services for Service and Seasonal Employees with Fees to Buy-In to Medicaid Research and Demonstration Waivers. Appointments with Robert Wood Johnson Foundation Officials Have Been held and Are Being Sought with HCFA. Counties are Being Considered for Demostration Sites.

VII. INTERFACE WITH GOVERNMENTAL, PLANNING and DEVELOPMENT INTERESTS

- Coastal Summit Meeting with Key State and Local Official, Business and Development Interest
  * Presentation of Scenarios
  * Identifying Common Agenda
  * Planning Future Interface

  May 19 - 20, 1989
- Others, To Be Determined

- Balance Representation on All Planning Agencies

VIII. COOPERATION AND COMMUNICATION BETWEEN INDIGENOUS AND NEW RESIDENTS IN THE COMMUNITY

- "Successful Communities Progam" is being developed with the Conservation Foundation to join indigenous and resort residents at Pawley's Island in concerted community planning.
- Property Taxpayers Coalition of Indigenous and New Residents
- Others, To Be Determined

FOCUS GROUP SURVEY RESULTS

RATING:

1. Please circle the number which expresses your level of interest in each item:

High 5 4 3 2 1 Low

RANKING

2. Of the items above which do you consider to be of the highest priority for public discussion and policy development?

First _(4)_ Second _(3)_ Third _(2)_ Fourth _(1)_

CHARLESTON 11/14/91 (n=6)	BEAUFORT 1/8/92 (n=9)	CONWAY 2/1/92 (n=9)	ITEMS RATED AND RANKED	CHARLESTON 11/14/91 (n=6) Rank	Score	BEAUFORT 1/8/92 (n=9) Rank	Score	CONWAY 2/1/92 (n=8) Rank	Score
5	4.8	4.7	1.1 Employment and job opportunities	1	(18)	1	(26)	1	(20)
3.9	3.7	4.2	1.2 Development and investment	4	(5)	7	(3)	4	(11)
4	4.2	4.4	1.3 Business opportunities	6	(4)	7	(3)	7	(2)
4.1	4.5	4.2	1.4 Education and training	2	(11)	2	(16)	1	(20)
4.1	4.3	3.6	1.5 Housing development	4	(6)	6	(6)	5	(7)
4	3.6	4	1.6 Property tax policies	6	(4)	11	(1)		(0)
4	3.8	3.6	1.7 Land values and tenure	9	(3)	10	(2)		(0)
4.7	4.7	4.6	1.8 Health and well-being	3	(9)	4	(8)	3	(13)
4	4.5	4.1	1.9 Environment and ecology		(0)	3	(11)		(0)
4	4.5	4.5	1.10 Infrastructure development (water, sewer, streets, utilities)	6	(4)	4	(8)	5	(7)
4.1	4.2	3.4	1.11 Traditional cultures and skills	10	(1)	7	(3)		(0)
3.7	4.1	3.7	1.12 New cultural opportunities		(0)		(0)		(0)

Others items suggested: Charleston - Recreation facilities for youth; youth development programs.
Beaufort - Comprehensive land development policy; Comprehensive human development policy.
Conway - Transportation systems; Minority representation.

3. What has been the impact of resort development and tourism on you? Good (3) Neutral (2) Bad (1)

	CHARLESTON (n=7)	BEAUFORT (n=6to8)	CONWAY (n=8)
3.1 You in general	1.28	2.57	2.25
3.2 Your family	2.71	2.5	2.25
3.3 Your job	2.28	2.5	2.37
3.4 Your living conditions	2.0	2.0	2.12
3.5 Your taxes	2.0	1.87	1.62
3.6 Your neighborhood	2.0	2.0	1.62
3.7 The larger community	2.16	2.14	2.25

COMMENTS:

Charleston: Efforts should be made to assist grassroots organizations (local) with all the resources available on a "five year plan." Many in my community work resort/tourism type jobs (influence generally positive). At this time I don't see any effect on me personally, (but) I have seen a negative effect in other areas.

Beaufort: I live in a community adjacent to major tourism and the impact in my community (particularly bad on taxes) will be for years and years to come. The economy of our region is primarily dependent upon the continued promotion and development of our tourism industry. Resort development may have brought in a few menial jobs, but has caused many poor land owners to loose their land and pay extremely high taxes.

Conway: Although it is "Good" money-wise, it is a burden to permanent residents who live and try to "make a living" outside the tourism industry. I have only been a resident of the coastal region for about six months, in that time I have only observed the negative impacts development has had in the inland area. The last two (3.6 Your neighborhood, and 3.7 The community at large - "negative") because of drugs.

4. What are the biggest benefits you have experienced as a result of tourism and resort development?

Beaufort: Jobs; Increased tax base (potential lowering of taxes); Availability of employment. Job opportunities locally; Increased tax revenue for education. Employment; Amenities and recreation opportunities. As a non-profit agency I receive donations from rich people who have moved into the area; Northern people tend to be not as judgmental and tend to be more generous. Better schools: Diverse economy. A more diverse community with more social/cultural opportunities.

Conway: Greater choices at restaurants; Increased number of residents, which has improved the base to support better services (e.g. education, health). Community growth in general, variety of businesses, recreational (opportunities), (and) population diversity (are) stimulating to community as a whole. Increase of service jobs; Improve real estate sales, property values, etc. Increase business opportunities. Increased job opportunities. Opportunities for growth and development; Dynamic economy. Jobs. Increase in resources at local level.

5. What are the biggest problems you have experienced as a result of tourism and resort development?

Beaufort: Too many people; Traffic. Rapid unplanned growth; Lack major facility development planning. Too much traffic on highways; Problems with drinking water. Increased traffic on highway systems; Increased property taxes due to increased demands on county services. Low wages; Increased taxes for the low income. Increase in property taxes; Land use. Increased services (government) negative impact on environment. Dead end jobsfor our students (graduates); Underemployment.

5. What are the biggest problems -continued

Conway: Traffic; Having to pay for their care (public services). Congestion; Too much growth for the present infrastructure to handle adequately; Lack of zoning and planned development. Higher taxes; Traffic problems; Everything geared to tourism, little for permanent residents. Jobs with no potential for advancement, low wages and no benefits; Land retention to indigenous population. Agency experiences rises in all case loads, economic and human (services). Traffic; Increased services burden on government. Spurt growth (poorly planned) reactionary; Transportation difficulties. Drugs, and poor planning. Deeper and wider gap between haves and have not's.

6. If you could change things about your community, what would you change?

Beaufort: Attitudes regarding controlled growth (planning) better. Health care for low income; Better job opportunities. Property tax structure (passage of local option); Improvement of some primary highways; Improvement of public education. Support for family units should be a thrust; Judgement of people who are different. Get jobs in that would pay good wages. Redo planning approaches;Require intergovernmental delivery (of services). Traffic; Stop development now.

Conway: Better jobs; Industry to support them. More cohesion within community and between communities. Greater sense of community; Improved transportation for public as a whole. Citizen involvement; Look to the needs of permanent residents. Improve highway and transportation systems. Employment mix. Better transportation; Controlled housing growth. Planning. People working in partnership with each other; Empowerment.

7. Do you feel a part of your community?	CHARLESTON	BEAUFORT	CONWAY
Yes	5	8	9
No	-	-	-
Other	1 Sometimes	1 No Response	

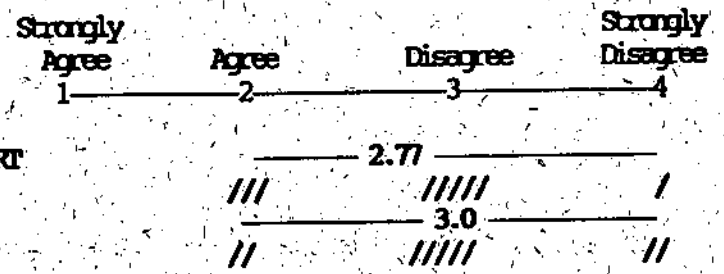
7.1 Do you vote			
regularly	5	8	9
occasionally	1	-	-
not at all	-	1 No Response	-

7.2 How well do you feel that elected officials understand your concerns and represent you?

Very Well 1 2 3 4 Very Poorly	CHARLESTON	BEAUFORT	CONWAY
7.2.1 Local officials	2.66	2.55	2.66
7.2.2 State officials	2.66	2.77	2.61
7.2.3 National officials	2.83	3.33	2.77

8. Please indicate the degree to which you agree or disagree

8.1 The rate of resort and tourism development has slowed considerably and has probably passed its peak for the next ten (10) years in coastal South Carolina.

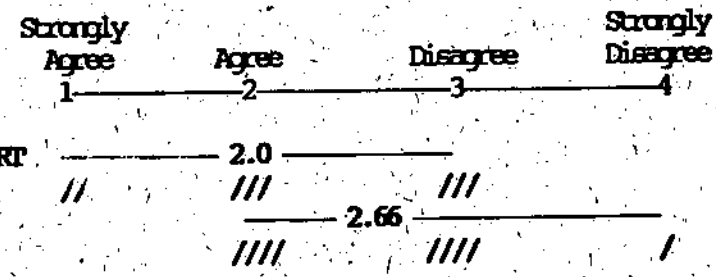


COMMENTS:

Beaufort: Although in a slump at present, tourism development continues to grow. (Agree) but does not measurably have to be "passed it peak." There is not much (suitable) available land to develop. Expect new (...) development within next 3 years, it will be health related.

Conway: Growth too rapid, unplanned; Little regard for public access or environment. All indicators show this statement (8.1) is false.

8.2 While resort and tourism produces mostly low wage jobs local people are better off because of them.



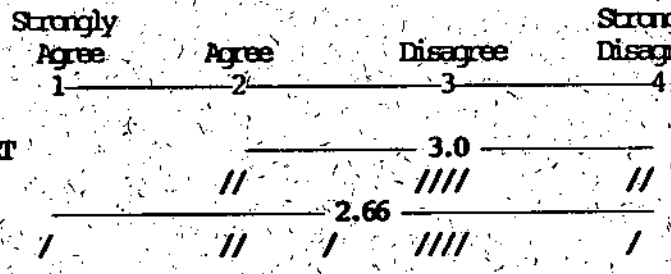
COMMENTS:

Beaufort: Cannot pay taxes, (thereby) lost most of their land. Standard of living has not kept up with development.

(Agree), with some hesitation. Many people can't understand that enough funds are not (...) to support families, and this generates a difficult set of problems.

Conway: Agree from a job standpoint, however the job produce no incentives for growth, apathy develops. Before the advent of the "fast food" many motel and restaurants entities young blacks were mostly unemployed year round and others worked only 3 months. We need a mix of all types of jobs to help balance the economy and allow the community as a whole to help shoulder government responsibilities.

8.3 The eco-system of coastal areas is adequately protected by present laws and regulations.



COMMENTS:

Beaufort: (Agree) somewhat. I don't think we need a nuclear weapons facility up stream on our water supply. Except SRP (Savanah River Nuclear Plant). You can do just about anything you want to.

Conway: The eco-system of coastal areas is adequately protected by laws and regulations. Some restrictions are in place but the "Greedy" still fight on to continue the ruin they have already wrought. Elected officials, I feel, understand problems but not to enact more stringent legislation to protect the coastal area; However, such legislation impact both positively and negatively.

RATING:

9. In your opinion, to what extent do the following factors contribute to environmental problems in the coastal area?

BEAUFORT 1/8/92 (n=9)	CONWAY 2/1/92 (n=9)	ITEMS RATED AND RANKED
High 5 4 3 2 1 Low		
3.5	3.7	9.1 Local commercial and industrial development
3.6	3.6	9.2 Inland (in upper parts of the state) commercial and industrial development
3.4	4.2	9.3 Resort and tourism development
3.2	4.0	9.4 Agricultural chemicals and fertilizers

Others items suggested: Beaufort - Savanah River (Nuclear) Plant

RANKING

10. Of the items above which do you consider to be the most serious threat to the environment?
First _(4)_ Second _(3)_ Third _(2)_ Fourth _(1)_

BEAUFORT 1/8/92 (n=9)		CONWAY 2/1/92 (n=8)	
Rank	Score	Rank	Score
2	(16)	1	(27)
4	(12)	3	(18)
1	(19)	1	(27)
3	(15)	4	(14)

11. Please check each of the items which apply to you:

11.1 I have lived in coastal South Carolina _____ years.

CHARLESTON 23.1 BEAUFORT 27.3 CONWAY 12.3

11.2 This is my permanent home ____.

CHARLESTON Y=5, N=0, N/R=1 BEAUFORT Y=8, N=0, N/R=1
CONWAY Y=3, N=0, N/R=6

11.3 I moved here for retirement ____.

CHARLESTON Y=1, N=4, N/R=1 BEAUFORT Y=2, N=7, N/R=0
CONWAY Y=0, N=3, N/R=6

11.4 My race or ethnic background is:

CHARLESTON - African-American 3 White 3

BEAUFORT - African-American 4 White 5

CONWAY - African-American 1 White 7

Native American 0 Hispanic 0 Other 0

11.5 My age is: <18 19-25 26-40 41-55 56-65 66-79 80+

CHARLESTON	0	0	3	1	2	0	0
BEAUFORT	0	1	1	6	1	0	0
CONWAY	0	1	1	4	3	0	0

11.6 I am: female male

CHARLESTON	3	3
BEAUFORT	3	6
CONWAY	3	6

11.7 My annual family income is in the following range:

	CHARLESTON	BEAUFORT	CONWAY
< $14,999	(no data)	-	-
$15,000 - 29,999		2	2
$30,000 - 49,999		4	1
$50,000 - 69,999		2	2
$70,000 - 99,999		1	3
> $100,000		-	-
No Response		-	1

vsi:conrepl

APPENDIX III

LIST OF PEOPLE INTERVIEWED

Beaufort

Bill Cochrane, president of ALCOA SC, developer of Dataw Island

Kitty Green, owner of the Gullah House restaurant

Frank Heflin, reporter, The State newspaper

S.C. Rep. Harriet Keyserling

Harry Smythe, Focus On Beaufort

Joe Mix, owner, Island Outfitters

Anne McNutt, president of Technical College of the Lowcountry

Elrid Moody, Beaufort County Councilman

Hilton Head

Jerry Barkie, former mayor, town of Hilton Head

Thomas Barnwell, housing developer

Sam Bolden, retired, former owner of a construction materials hauling company

Jason Brown, hotel bellman, Hilton Head

Juan Byers, manager of a low-income housing project and member of the Hilton Head Native Islander Committee

Morris Campbell, longtime resident, Hilton Head

John Curry, Chairman of Hilton Head Visitor & Convention Bureau

Joe Driessen, golf course worker

Julie Fine, manager of Mall at Shelter Cover

Doris Grant, activist, organizing workers

Ben Hudson, former shrimper/restaurant owner

Veronica Miller, board member, Institute of Community Education and Training

Thomas Norby, vice president, Sea Pines Plantation

St. Helena Island

Rev. Ervin Greene, minister, St. Helena

Frieda Mitchell, executive director, United Communities for Child Development Inc., St. Helena

Charleston

Robina Blake, basketmaker, Mount Pleasant

Althea Coakley, basketmaker, Mount Pleasant

Charlotte Fairey, director, Charleston Bed & Breakfast

Elizabeth Mazyck, basketmaker, Mount Pleasant

Sue Middleton, basketmaker, Mount Pleasant

Dan and Linda Ravenel, Charleston residents

Margaret Davidson, director, Sea Grant Consortium,

Johns Island

Bill Jenkins, resident, health care activist

Phillip Simmons, former farmer and now bank teller

Walter Stanley, Manager of Stanley Tire Company

Rev. Alonza Washington, minister

Wadlamaw Island

Libby & George Ambrose, shrimpers

Dana Beach, executive director, Coastal Conservation League

Lonnie Taylor, crabber/shrimper

John Taylor, waiter

Grand Strand

Becki Brantley, executive director, Camp Baskervill

Jimmy Chandler, director of Environmental Law Project, Pawleys Island

Tony Campbell, director of development, Episcopal Diocese

"Coupe" de Ville, chairman of Myrtle Beach Air Force Base Redevelopment Committee and personnel director for Waccamaw, Inc.

John Maxwell, owner Hendrix House Motel, former president of Hotel/Motel Association, and Myrtle Beach City Councilman

Genevieve Peterkin, longtime resident, Murrells Inlet

Bill Pritchard, vice president, Burroughs & Chapin Company

Vera Thomas, marketing director, Myrtle Beach Hotel/Motel Association

Jesse Ward, president of the Garden City Homeowners Association, and his wife, Elizabeth

Tracy Winley, hotel maid, Georgetown

OTHERS

Bill Lawrence, executive director, S.C. Department of Parks, Recreation and Tourism

O'Neal Smalls, University of South Carolina law professor

Dr. John Vernberg, director, Belle Baruch Institute of Marine and Coastal Research

FOCUS GROUP PARTICIPATION

CHARLESTON DEVELOPMENT FOCUS GROUP

Ms. Lonese Wrighten-Jenkins, Charleston County Human Services Corporation, Charleston, South Carolina

Ms. Karen Rivers, Charleston County Human Services Corporation, Charleston, South Carolina

Mr. John Wilson, Executive Director, Rural Areas Economic Development Project (RAEDP), Mt Pleasant, South Carolina

Mr. Arthur Pinckney, Board Member, Rural Areas Economic Development Project (RAEDP), Mt. Pleasant, South Carolina

Mr. Jules Plouffe, Director, Georgetown Job Service, South Carolina Employment Security Commission, Georgetown, South Carolina

Ms. Sylvia Mitchum, Director, Work Support Programs, Charleston County Department of Social Services, Charleston, South Carolina

Also Attending
Mr. Marvin Lare, Director, South Carolina Institute on Poverty and Deprivation

BEAUFORT DEVELOPMENT FOCUS GROUP

Mr. Fred S. Washington, Jr., Director, Beaufort County Department of Social Services, Beaufort, South Carolina
Ms. Laura Busch, Beaufort County Board of Education, Bluffton, South Carolina
Mr. Joseph McDomick, Land Retention Coordinator, Penn Community Services, Inc., St. Helena, South Carolina
Ms. Martha Dicus, Attorney, Neighborhood Legal Services, St. Helena, South Carolina
Mr. York Glover, Extension Agent, Clemson University, Beaufort, South Carolina
Leroy H. Gilliard, Executive Director, Beaufort/Jasper Economic Opportunity Commission, Beaufort, South Carolina
Sister Ellen Roberston, Ph.D., Executive Director, Low Country Human Development Center, Ridgeland, South Carolina
Mr. Buddy Thompson, Executive Director, Lowcountry Regional Planning Council, Yamesse, South Carolina
Mr. Jim Wescott, Executive Director, Lowcountry and Resort Islands Tourism Commission, Hampton, South Carolina
Mr. Henry P. Moss, Jr., County Administrator, Jasper County, Ridgeland, South Carolina
Mr. Buddy Thompson, Executive Director/ Lowcountry Regional Planning Council

Also Attending
Mr. Kenneth Driggers, Executive Director, The Palmetto Conservation Foundation
Dr. Bob Healy, School of the Environment, Duke University,

Mr. Dewitt John, State Policy Coordinator, The Aspen Institute
Mr. Marvin Lare, Director, South Carolina Institute on Poverty and Deprivation

CONWAY DEVELOPMENT FOCUS GROUP

Dr. Peter B. Barr, Director, Coastal Center for Economic and Community Development, University of South Carolina - Coastal Carolina, Conway, South Carolina

Mr. Jack C. Hutchinson, Executive Director, Horry County Development Board, Conway, South Carolina

Ms. Jeanne Casey, Executive Director, Community Volunteer Services, Inc., Myrtle Beach, South Carolina

Ms. Becky Brantley, Executive Director, Camp Baskerville, Pawley's Island, South Carolina

Ms. Sara Haynes, Intern, Camp Baskerville, Pawley's Island, South Carolina

Mr. David Mincey, Director, Horry County Department of Social Services, Conway, South Carolina

Mr. Arthur Winston, Coastal Communities Resources Network, Conway, South Carolina

Mr. Warren Hix, Executive Director, South Horry Health Clinic, Conway, South Carolina

Mr. James Powell, Director, Horry County Adult Education, Conway, South Carolina

Also Attending
Mr. Kenneth Driggers, Executive Director, The Palmetto Conservation Foundation
Mr. Marvin Lare, Director, South Carolina Institute on Poverty and Deprivation

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1. Mr. J.W. Lawrence, Executive Director
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29. The Honorable Joseph Riley
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