

The Economic Impact of the Military in South Carolina: A Focus on the Industry Distribution of Economic Activity

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April 2004*

The many military installations dispersed across South Carolina are a substantial segment of the overall South Carolina economy. Bases around the state fuel economic activity by purchasing goods and services from the local community and by providing income to military and civilian personnel. In addition to these direct impacts that are due to the operations of the bases, additional benefits accrue to the state economy because of the military-related visitors and military retirees that they attract.

However, the ultimate impacts on the state and local economies do not stop with these direct expenditures associated with the military bases. Once an initial injection of funds occurs in the local economy, additional rounds of economic activity are supported by economic multiplier effects. By including these multiplier impacts, the true significance of military base operations to the state and local economies becomes clear.

Further, the role of a military base in the local economy is somewhat unique in that the funding for the operations comes from the federal government. While some of this federal funding is the return of South Carolina tax dollars, much of the money used to support the military represents a true net addition to the South Carolina economy. In this way, the impacts of the military add to the economy as opposed to simply redistributing existing funds.

* This report updates the February 2004 version to incorporate revised source data from the Charleston region.

The tables presented here show various forms of economic impacts that arise from the following sources:

- The operations of Fort Jackson, Shaw Air Force Base and McEntire Air National Guard Station in the Midlands region
- The operations of the Charleston Air Force Base and Naval Weapons Station in Charleston
- The operations of the Marine Corp Air Station, Marine Corps Recruit Depot and Naval Hospital in the Beaufort area
- Military-related visitors, specifically to Fort Jackson, the Marine Corps Recruit Depot, and the Charleston area
- Military Retirees

The major results reported within these tables include:

- A total of \$7.3 billion in sales accrue annually to South Carolina businesses because of the military's overall presence in the state. Of this total, \$5.9 billion is due to military base operations, \$1.3 billion is due to the in-state spending of military retirees, and just under \$100 million is due to military-related visitors.
- Across South Carolina, a total of nearly 142,000 jobs are directly or indirectly supported by the presence of the military. This job total represents nearly 8 percent of total employment in South Carolina. Of this job total, about 54,000 are jobs directly at military bases while the remainder is spread across virtually every sector of the state's economy.
- The military's presence supports about \$5.1 billion annually in personal income for South Carolinians. Again, this income flows throughout the economy, not just to those directly employed at the military installations.
- The total impact of the military on businesses in the Midlands amounts to \$2.3 billion each year. This economic activity helps support 55,500 jobs and \$1.9 billion in personal income in the Midlands area.

- The military's impact in the Charleston area amounts to \$3.5 billion worth of sales at local businesses, a total of 64,300 jobs, and \$2.2 billion in personal income.
- The military's presence in Beaufort supports a total of \$717.5 million in sales at local businesses. This spending supports a total of 17,500 jobs and \$614.6 million in personal income each year.

These results clearly show the substantial impact of the military on South Carolina's economy. While the magnitude of these impacts is vital to understanding the importance of the military, the ultimate goal of the figures presented in this report is to provide an estimate of the industry distribution of this business activity. For every area and every direct source of impacts a table provides a list of the 40 industries most affected in terms of annual sales. These industry estimates are the heart of this report and serve to show the breadth of the military's impact on the state and local economies in South Carolina.

All of the estimated impacts presented in the following tables are based on direct data covering military base expenditures, visitor expenditures, and retiree income and expenditures. The direct spending figures come from a variety of sources, including direct correspondence with military bases, local economic development officials, and several federal government databases. These direct effects then form the basis for estimating the multiplier effects using IMPLAN, a widely used program for modeling economic impacts that relies on data specific to the state and county economies.

Statewide Economic Impact Summary

SUMMARY OF MILITARY IMPACTS IN SOUTH CAROLINA

BASE OPERATIONS

Fort Jackson, McEntire, Shaw, MCAS, MCRD, Beaufort NH, CAFB, CNWS

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$2,813,464,910	\$3,127,132,666	\$5,940,597,576
Employment	54,110	70,808	124,918
Labor Income	\$1,741,500,000	\$2,057,700,091	\$3,799,200,091

VISITORS

Military Visitors to Beaufort, Charleston, Midlands

	Total Impacts
Business Sales	\$67,652,269
Employment	1,234
Labor Income	\$25,785,274

RETIREE SPENDING

	Total Impacts	Retiree Income
Business Sales	\$1,323,705,774	
Employment	15,782	
Labor Income	\$440,094,889	\$860,800,000

OVERALL MILITARY IMPACT ON SOUTH CAROLINA (INCLUDES BASE OPERATIONS, MILITARY VISITORS, STATEWIDE MILITARY RETIREES)

	Total Impacts
Business Sales	\$7,331,955,619
Employment	141,934
Personal Income	\$5,125,880,254

All dollar figures are in 2003 dollars. For base operations impacts, the direct impacts include: base expenditures in the local economy, the spending of personnel payroll in the local economy, and military and civilian employment directly at the base. The retiree spending impacts are based on the local expenditures of retirees living anywhere in South Carolina. The overall impacts on South Carolina are greater than the sum of the individual regional impacts. Primarily this is because the statewide impacts capture interregional spillovers that represent a leakage from the local economy.

Annual Sales at S.C. Businesses due to Base Operations

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$533,803,488
2 Other Business Services	\$364,978,016
3 Real Estate	\$289,093,280
4 Maintenance and Repair- Residential	\$238,033,776
5 Doctors and Dentists	\$198,482,704
6 Wholesale Trade	\$197,115,616
7 State and Local Electric Utilities	\$186,958,960
8 Eating & Drinking	\$178,389,616
9 Services To Buildings	\$158,664,320
10 Banking	\$155,678,512
11 Engineering- Architectural Services	\$127,858,520
12 Automotive Dealers & Service Stations	\$111,647,264
13 Insurance Carriers	\$106,390,056
14 Communications- Except Radio and TV	\$97,446,848
15 Miscellaneous Retail	\$96,584,504
16 Motor Freight Transport and Warehousing	\$83,029,872
17 Food Stores	\$78,603,496
18 Electric Services	\$77,864,912
19 Hospitals	\$73,005,032
20 Management and Consulting Services	\$69,173,392
21 Hotels and Lodging Places	\$66,429,204
22 General Merchandise Stores	\$60,273,968
23 Motor Vehicles	\$60,046,244
24 Legal Services	\$57,568,548
25 Other State and Local Govt Enterprises	\$55,758,408
26 Personnel Supply Services	\$51,757,688
27 Motor Vehicle Parts and Accessories	\$47,477,660
28 State/Local Govt NonEducation	\$46,409,288
29 Computer and Data Processing Services	\$45,149,496
30 Automobile Repair and Services	\$43,781,648
31 Miscellaneous Plastics Products	\$42,497,440
32 Credit Agencies	\$39,598,740
33 Accounting- Auditing and Bookkeeping	\$39,430,508
34 Other Medical and Health Services	\$37,159,492
35 Sanitary Services and Steam Supply	\$36,867,776
36 Apparel Made From Purchased Materials	\$35,765,452
37 Insurance Agents and Brokers	\$35,736,124
Amusement and Recreation Services-	
38 N.E.C.	\$33,471,280
39 Furniture & Home Furnishings Stores	\$33,316,408
40 Apparel & Accessory Stores	\$33,064,378

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at S.C. Businesses due to Military Visitors

Industry	Annual
1 Hotels and Lodging Places	\$22,510,846
2 Eating & Drinking	\$13,306,583
3 Real Estate	\$2,958,622
4 Miscellaneous Retail	\$2,870,114
5 Banking	\$1,441,757
6 Wholesale Trade	\$1,440,395
7 Doctors and Dentists	\$1,091,028
8 Maintenance and Repair Other Facilities	\$867,383
9 Communications- Except Radio and TV	\$855,804
10 Other Business Services	\$811,141
11 Motor Freight Transport and Warehousing	\$710,064
12 Hospitals	\$680,361
13 Management and Consulting Services	\$661,501
14 Electric Services	\$658,008
15 Credit Agencies	\$653,737
16 Automotive Dealers & Service Stations	\$573,012
17 Personnel Supply Services	\$549,889
18 Computer and Data Processing Services	\$548,310
19 Insurance Carriers	\$516,757
20 Legal Services	\$464,821
21 Food Stores	\$442,874
22 Other State and Local Govt Enterprises	\$407,153
23 Maintenance and Repair- Residential	\$399,221
24 Services To Buildings	\$398,275
25 Accounting- Auditing and Bookkeeping	\$368,150
26 General Merchandise Stores	\$311,182
27 Automobile Repair and Services	\$293,647
28 Radio and TV Broadcasting	\$277,650
29 U.S. Postal Service	\$264,318
30 Other Medical and Health Services	\$239,787
31 Commercial Printing	\$231,384
32 Arrangement Of Passenger Transportation	\$224,141
33 Sanitary Services and Steam Supply	\$220,676
34 Furniture & Home Furnishings Stores	\$193,208
35 Detective and Protective Services	\$192,397
36 Newspapers	\$182,544
37 Building Materials & Gardening	\$173,787
38 Amusement and Recreation Services-	\$172,602
39 Laundry- Cleaning and Shoe Repair	\$170,708
40 Motor Vehicles	\$169,221

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at S.C. Businesses due to Military Retirees

Industry	Annual
1 Real Estate	\$82,334,128
2 Doctors and Dentists	\$69,960,120
3 Eating & Drinking	\$61,678,312
4 Wholesale Trade	\$54,256,516
5 Banking	\$47,392,784
6 Insurance Carriers	\$36,597,516
7 Automotive Dealers & Service Stations	\$34,632,580
8 Miscellaneous Retail	\$31,652,964
9 Food Stores	\$26,767,074
10 Communications- Except Radio and TV	\$25,220,972
11 Electric Services	\$24,487,236
12 Hospitals	\$23,900,234
13 State/Local Govt NonEducation	\$22,432,234
14 Motor Vehicles	\$21,391,744
15 General Merchandise Stores	\$20,512,020
16 Motor Freight Transport and Warehousing	\$18,737,086
17 Hotels and Lodging Places	\$17,380,694
18 Maintenance and Repair Other Facilities	\$16,038,883
19 Legal Services	\$15,876,006
20 Other State and Local Govt Enterprises	\$15,639,790
21 Maintenance and Repair- Residential	\$15,571,720
22 Motor Vehicle Parts and Accessories	\$13,902,817
23 Automobile Repair and Services	\$13,181,015
24 Other Medical and Health Services	\$12,978,530
25 Apparel Made From Purchased Materials	\$12,632,769
26 Insurance Agents and Brokers	\$12,293,003
27 Amusement and Recreation Services-	\$11,889,371
28 Credit Agencies	\$11,776,268
29 Apparel & Accessory Stores	\$11,247,993
30 Furniture & Home Furnishings Stores	\$10,860,797
31 Other Business Services	\$10,583,973
32 Cyclic Crudes- Interm. & Indus. Organic	\$9,740,395
33 Building Materials & Gardening	\$9,017,467
34 Personnel Supply Services	\$8,938,905
35 Computer and Data Processing Services	\$8,747,790
36 Miscellaneous Plastics Products	\$8,743,645
37 Drugs	\$8,004,649
38 Bottled and Canned Soft Drinks & Water	\$7,729,764
39 Management and Consulting Services	\$7,602,776
40 Security and Commodity Brokers	\$7,184,697

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

**Annual Sales at S.C. Businesses due to Overall Military Presence, South Carolina
Includes Effects of Base Operations, Visitors, and Retirees**

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$550,709,754
2 Other Business Services	\$376,373,130
3 Real Estate	\$374,386,030
4 Doctors and Dentists	\$269,533,852
5 Maintenance and Repair- Residential	\$254,004,717
6 Eating & Drinking	\$253,374,511
7 Wholesale Trade	\$252,812,527
8 Banking	\$204,513,053
9 State and Local Electric Utilities	\$192,251,263
10 Services To Buildings	\$164,424,356
11 Automotive Dealers & Service Stations	\$146,852,856
12 Insurance Carriers	\$143,504,329
13 Miscellaneous Retail	\$131,107,582
14 Engineering- Architectural Services	\$130,828,398
15 Communications- Except Radio and TV	\$123,523,624
16 Hotels and Lodging Places	\$106,320,744
17 Food Stores	\$105,813,444
18 Electric Services	\$103,010,156
19 Motor Freight Transport and Warehousing	\$102,477,022
20 Hospitals	\$97,585,627
21 Motor Vehicles	\$81,607,209
22 General Merchandise Stores	\$81,097,170
23 Management and Consulting Services	\$77,437,669
24 Legal Services	\$73,909,375
25 Other State and Local Govt Enterprises	\$71,805,351
26 State/Local Govt NonEducation	\$68,841,522
27 Motor Vehicle Parts and Accessories	\$61,535,348
28 Personnel Supply Services	\$61,246,482
29 Automobile Repair and Services	\$57,256,310
30 Computer and Data Processing Services	\$54,445,596
31 Credit Agencies	\$52,028,745
32 Miscellaneous Plastics Products	\$51,337,135
33 Other Medical and Health Services	\$50,377,809
34 Apparel Made From Purchased Materials	\$48,512,931
35 Insurance Agents and Brokers	\$48,188,966
36 Accounting- Auditing and Bookkeeping Amusement and Recreation Services-	\$46,063,337
37 N.E.C.	\$45,533,253
38 Apparel & Accessory Stores	\$44,474,705
39 Furniture & Home Furnishings Stores	\$44,370,413
40 Sanitary Services and Steam Supply	\$42,284,386

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Economic Impacts for the Midlands Region

SUMMARY OF MILITARY IMPACTS IN THE MIDLANDS

BASE OPERATIONS

Fort Jackson

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$580,391,534	\$587,383,165	\$1,167,774,699
Employment	19,000	14,251	33,251
Labor Income	\$510,500,000	\$400,870,737	\$911,370,737

McEntire

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$69,294,644	\$70,644,503	\$139,939,147
Employment	1,799	1,707	3,506
Labor Income	\$54,000,000	\$48,200,000	\$102,200,000

Shaw AFB

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$251,483,379	\$261,850,368	\$513,333,747
Employment	6,866	6,246	13,112
Labor Income	\$227,600,000	\$177,951,207	\$405,551,207

VISITORS

Fort Jackson

	Total Impacts
Business Sales	\$28,259,048
Employment	530
Labor Income	\$10,493,205

RETIREE SPENDING

	Total Impacts	Retiree Income
Business Sales	\$418,766,581	
Employment	5,123	
Labor Income	\$139,716,942	\$282,100,000

COMBINED MILITARY IMPACT ON THE MIDLANDS (INCLUDES BASE OPERATIONS AT FORT JACKSON, MCENTIRE, SHAW, FORT JACKSON VISITORS, AND AREA MILITARY RETIREES)

	Total Impacts
Business Sales	\$2,268,073,222
Employment	55,522
Personal Income	\$1,851,432,091

All dollar figures are in 2003 dollars. For base operations impacts, the direct impacts include: base expenditures in the local economy, the spending of personnel payroll in the local economy, and military and civilian employment directly at the base. Fort Jackson visitor impacts are based on an estimate of \$13.8 million in visitor spending annually. The \$28.3 million impact of visitor spending includes the \$13.8 million in direct spending and the multiplier effects of this direct expenditure. The retiree spending impacts are based on the local expenditures of retirees living in the 290, 291, and 292 3-digit zip code areas.

Annual Sales at Local Businesses Due to Fort Jackson Operations

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$71,767,272
2 Other Business Services	\$64,881,888
3 Real Estate	\$54,292,760
4 Doctors and Dentists	\$47,406,280
5 Wholesale Trade	\$45,206,876
6 Banking	\$41,279,056
7 Eating & Drinking	\$41,217,572
8 Maintenance and Repair- Residential	\$34,665,668
9 Insurance Carriers	\$30,107,480
10 Automotive Dealers & Service Stations	\$25,428,316
11 Communications- Except Radio and TV	\$25,400,646
12 State and Local Electric Utilities	\$24,468,758
13 Miscellaneous Retail	\$21,538,700
14 Services To Buildings	\$21,283,262
15 Motor Freight Transport and Warehousing	\$18,232,926
16 Electric Services	\$18,201,200
17 Food Stores	\$17,955,978
18 State/Local Govt NonEducation	\$17,615,544
19 Motor Vehicles	\$16,115,028
20 Hospitals	\$15,746,573
21 Computer and Data Processing Services	\$15,490,901
22 Engineering- Architectural Services	\$15,485,373
23 General Merchandise Stores	\$14,001,727
24 Other State and Local Govt Enterprises	\$12,401,336
25 Legal Services	\$12,256,193
26 Management and Consulting Services	\$10,610,891
27 Credit Agencies	\$10,465,370
28 Apparel Made From Purchased Materials	\$9,825,918
29 Personnel Supply Services	\$9,735,458
30 Automobile Repair and Services	\$9,513,671
31 Insurance Agents and Brokers	\$9,071,798
32 Accounting- Auditing and Bookkeeping	\$8,972,268
33 Other Medical and Health Services	\$8,853,967
34 Inorganic Chemicals Nec.	\$8,841,717
35 Hotels and Lodging Places	\$8,068,326
36 Furniture & Home Furnishings Stores	\$7,772,854
37 Amusement and Recreation Services- N.E.C.	\$7,544,149
38 Commercial Printing	\$6,817,244
39 Building Materials & Gardening	\$6,723,744
40 Apparel & Accessory Stores	\$6,695,509

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses Due to McEntire Operations

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$9,266,711
2 Other Business Services	\$8,379,103
3 Real Estate	\$6,399,305
4 Doctors and Dentists	\$5,602,505
5 Wholesale Trade	\$5,277,947
6 Banking	\$4,970,682
7 Eating & Drinking	\$4,787,824
8 Maintenance and Repair- Residential	\$4,401,336
9 Insurance Carriers	\$3,614,729
10 State and Local Electric Utilities	\$3,169,284
11 Communications- Except Radio and TV	\$3,013,994
12 Automotive Dealers & Service Stations	\$2,957,936
13 Services To Buildings	\$2,745,365
14 Miscellaneous Retail	\$2,490,612
15 Motor Freight Transport and Warehousing	\$2,179,020
16 Electric Services	\$2,111,245
17 Food Stores	\$2,071,374
18 State/Local Govt NonEducation	\$2,042,769
19 Engineering- Architectural Services	\$2,007,902
20 Computer and Data Processing Services	\$1,875,909
21 Hospitals	\$1,867,272
22 Motor Vehicles	\$1,847,917
23 General Merchandise Stores	\$1,616,383
24 Legal Services	\$1,460,033
25 Other State and Local Govt Enterprises	\$1,454,722
26 Management and Consulting Services	\$1,320,070
27 Credit Agencies	\$1,225,762
28 Personnel Supply Services	\$1,184,996
29 Apparel Made From Purchased Materials	\$1,119,965
30 Automobile Repair and Services	\$1,118,605
31 Accounting- Auditing and Bookkeeping	\$1,099,962
32 Insurance Agents and Brokers	\$1,089,168
33 Other Medical and Health Services	\$1,050,710
34 Inorganic Chemicals Nec.	\$1,004,440
35 Hotels and Lodging Places	\$966,040
36 Furniture & Home Furnishings Stores	\$901,085
37 Amusement and Recreation Services- N.E.C.	\$878,439
38 Commercial Printing	\$819,071
39 U.S. Postal Service	\$795,922
40 Building Materials & Gardening	\$784,158

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses Due to Shaw AFB Operations

	Industry	Annual Sales
1	Real Estate	\$26,524,010
2	Maintenance and Repair Other Facilities	\$24,368,120
3	Other Business Services	\$23,423,442
4	Doctors and Dentists	\$22,899,946
5	Banking	\$22,305,062
6	Wholesale Trade	\$20,493,868
7	Eating & Drinking	\$18,729,614
8	Insurance Carriers	\$14,208,186
9	Communications- Except Radio and TV	\$13,897,486
10	Maintenance and Repair- Residential	\$13,017,723
11	Automotive Dealers & Service Stations	\$11,440,925
12	Hospitals	\$9,987,913
13	Miscellaneous Retail	\$9,833,802
14	Computer and Data Processing Services	\$9,411,033
15	State/Local Govt NonEducation	\$8,488,274
16	State and Local Electric Utilities	\$8,487,625
17	Electric Services	\$8,147,599
18	Food Stores	\$7,938,188
19	Services To Buildings	\$7,552,292
20	Motor Freight Transport and Warehousing	\$7,392,148
21	Legal Services	\$6,845,623
22	Engineering- Architectural Services	\$6,604,266
23	General Merchandise Stores	\$6,371,993
24	Motor Vehicles	\$6,261,400
25	Other State and Local Govt Enterprises	\$6,029,245
26	Credit Agencies	\$5,481,840
27	Inorganic Chemicals Nec.	\$5,304,560
28	Motor Vehicle Parts and Accessories	\$5,170,007
29	Management and Consulting Services	\$4,912,641
30	Accounting- Auditing and Bookkeeping	\$4,496,864
31	Automobile Repair and Services	\$4,492,666
32	Sausages and Other Prepared Meats	\$4,414,717
33	Personnel Supply Services	\$4,235,081
34	Other Medical and Health Services	\$4,228,579
35	Apparel Made From Purchased Materials	\$4,067,113
36	Hotels and Lodging Places	\$3,863,582
37	Furniture & Home Furnishings Stores	\$3,536,026
38	Amusement and Recreation Services- N.E.C.	\$3,511,645
39	Insurance Agents and Brokers	\$3,360,187
40	Apparel & Accessory Stores	\$3,340,356

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Fort Jackson Visitors

	Industry	Annual Sales
1	Hotels and Lodging Places	\$9,397,066
2	Eating & Drinking	\$5,370,875
3	Real Estate	\$1,052,258
4	Banking	\$766,047
5	Wholesale Trade	\$685,357
6	Doctors and Dentists	\$468,591
7	Communications- Except Radio and TV	\$421,106
8	Credit Agencies	\$377,533
9	Insurance Carriers	\$371,283
10	Maintenance and Repair Other Facilities	\$366,032
11	Electric Services	\$354,134
12	Other Business Services	\$331,922
13	Motor Freight Transport and Warehousing	\$329,659
14	Computer and Data Processing Services	\$299,004
15	Personnel Supply Services	\$266,883
16	Management and Consulting Services	\$243,140
17	Automotive Dealers & Service Stations	\$241,912
18	Hospitals	\$215,663
19	Miscellaneous Retail	\$200,585
20	Legal Services	\$185,131
21	Food Stores	\$173,673
22	Motor Vehicles	\$169,221
23	Services To Buildings	\$162,755
24	Accounting- Auditing and Bookkeeping	\$161,038
25	Other State and Local Govt Enterprises	\$147,287
26	Maintenance and Repair- Residential	\$147,272
27	Commercial Printing	\$141,192
28	General Merchandise Stores	\$137,402
29	U.S. Postal Service	\$117,204
30	Automobile Repair and Services	\$116,560
31	Bread- Cake- and Related Products	\$114,729
32	Insurance Agents and Brokers	\$111,873
33	Radio and TV Broadcasting	\$106,674
34	Bottled and Canned Soft Drinks & Water	\$105,035
35	Sanitary Services and Steam Supply	\$100,451
36	Other Medical and Health Services	\$100,284
37	Apparel Made From Purchased Materials	\$97,824
38	Meat Packing Plants	\$93,774
39	Poultry Processing	\$92,398
40	Detective and Protective Services	\$85,550

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses Due to Military Retirees, Midlands

	Industry	Annual Sales
1	Real Estate	\$23,369,090
2	Doctors and Dentists	\$22,479,124
3	Eating & Drinking	\$19,305,370
4	Wholesale Trade	\$18,432,616
5	Banking	\$17,419,932
6	Insurance Carriers	\$13,485,071
7	Automotive Dealers & Service Stations	\$11,213,433
8	Miscellaneous Retail	\$9,914,351
9	State/Local Govt NonEducation	\$9,734,271
10	Communications- Except Radio and TV	\$9,617,933
11	Food Stores	\$8,412,021
12	Electric Services	\$8,141,212
13	Motor Vehicles	\$7,551,664
14	Hospitals	\$6,988,963
15	Motor Freight Transport and Warehousing	\$6,658,936
16	General Merchandise Stores	\$6,528,601
17	Other State and Local Govt Enterprises	\$5,453,742
18	Legal Services	\$5,073,495
19	Computer and Data Processing Services	\$5,065,710
20	Maintenance and Repair Other Facilities	\$4,979,195
21	Maintenance and Repair- Residential	\$4,912,111
22	Apparel Made From Purchased Materials	\$4,660,175
23	Other Business Services	\$4,505,833
24	Credit Agencies	\$4,409,781
25	Inorganic Chemicals Nec.	\$4,293,294
26	Automobile Repair and Services	\$4,155,471
27	Other Medical and Health Services	\$4,098,369
28	Insurance Agents and Brokers	\$4,063,238
29	Hotels and Lodging Places	\$3,605,370
30	Amusement and Recreation Services- N.E.C.	\$3,581,055
31	Furniture & Home Furnishings Stores	\$3,521,149
32	Apparel & Accessory Stores	\$3,251,231
33	Personnel Supply Services	\$2,941,393
34	Cyclic Crudes- Interm. & Indus. Organic Chem.	\$2,916,385
35	Building Materials & Gardening	\$2,914,500
36	Bottled and Canned Soft Drinks & Water	\$2,878,446
37	Motor Vehicle Parts and Accessories	\$2,657,221
38	Accounting- Auditing and Bookkeeping	\$2,522,509
39	Security and Commodity Brokers	\$2,495,930
40	Management and Consulting Services	\$2,363,407

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

**Annual Sales at Local Businesses due to Overall Military Presence, Midlands Area
Includes Effects of Fort Jackson, McEntire and Shaw Operations, Fort Jackson
Visitors, and Area Retirees**

Industry	Annual Sales
1 Real Estate	\$111,637,423
2 Maintenance and Repair Other Facilities	\$110,747,330
3 Other Business Services	\$101,522,188
4 Doctors and Dentists	\$98,856,446
5 Wholesale Trade	\$90,096,664
6 Eating & Drinking	\$89,411,255
7 Banking	\$86,740,779
8 Insurance Carriers	\$61,786,749
9 Maintenance and Repair- Residential	\$57,144,110
10 Communications- Except Radio and TV	\$52,351,165
11 Automotive Dealers & Service Stations	\$51,282,522
12 Miscellaneous Retail	\$43,978,050
13 State/Local Govt NonEducation	\$37,880,858
14 State and Local Electric Utilities	\$37,512,179
15 Electric Services	\$36,955,390
16 Food Stores	\$36,551,234
17 Hospitals	\$34,806,384
18 Motor Freight Transport and Warehousing	\$34,792,689
19 Services To Buildings	\$33,350,254
20 Computer and Data Processing Services	\$32,142,557
21 Motor Vehicles	\$31,945,230
22 General Merchandise Stores	\$28,656,106
23 Hotels and Lodging Places	\$25,900,384
24 Legal Services	\$25,820,475
25 Other State and Local Govt Enterprises	\$25,486,332
26 Engineering- Architectural Services	\$24,963,787
27 Credit Agencies	\$21,960,286
28 Apparel Made From Purchased Materials	\$19,770,995
29 Inorganic Chemicals Nec.	\$19,487,601
30 Management and Consulting Services	\$19,450,149
31 Automobile Repair and Services	\$19,396,973
32 Personnel Supply Services	\$18,363,811
33 Other Medical and Health Services	\$18,331,909
34 Insurance Agents and Brokers	\$17,696,264
35 Accounting- Auditing and Bookkeeping	\$17,252,641
36 Furniture & Home Furnishings Stores	\$15,810,913
37 Amusement and Recreation Services- N.E.C.	\$15,589,384
38 Motor Vehicle Parts and Accessories	\$14,887,667
39 Apparel & Accessory Stores	\$14,103,415
40 Building Materials & Gardening	\$13,503,087

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Economic Impacts for the Charleston Region

SUMMARY OF MILITARY IMPACTS IN CHARLESTON

BASE OPERATIONS

Charleston Air Force Base

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$409,140,351	\$377,475,097	\$786,615,448
Employment	6,942	10,181	17,123
Labor Income	\$194,700,000	\$283,467,562	\$478,167,562

Charleston Naval Weapons Station

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$1,195,878,474	\$1,129,577,232	\$2,325,455,706
Employment	11,673	30,546	42,219
Labor Income	\$476,000,000	\$849,468,994	\$1,325,468,994

VISITORS

Military Visitors to Charleston

	Total Impacts
Business Sales	\$28,429,947
Employment	505
Labor Income	\$10,954,152

RETIREE SPENDING

	Total Impacts	Retiree Income
Business Sales	\$345,929,655	
Employment	4,431	
Labor Income	\$119,621,397	\$249,200,000

OVERALL MILITARY IMPACT ON THE CHARLESTON AREA (INCLUDES BASE OPERATIONS AT AFB AND NWS, MILITARY VISITORS, AREA MILITARY RETIREES)

	Total Impacts
Business Sales	\$3,486,430,756
Employment	64,278
Personal Income	\$2,183,412,105

All dollar figures are in 2003 dollars. For base operations impacts, the direct impacts include: base expenditures in the local economy, the spending of personnel payroll in the local economy, and military and civilian employment directly at the base. Charleston visitor impacts are based on an estimate of \$15.3 million in visitor spending annually. The \$28.4 million impact of visitor spending includes the \$15.3 million in direct spending and the multiplier effects of this direct expenditure. The retiree spending impacts are based on the local expenditures of retirees living in the 294 3-digit zip code area.

Annual Sales at Local Businesses due to Charleston AFB Operations

	Industry	Annual Sales
1	Maintenance and Repair Other Facilities	\$88,750,888
2	Other Business Services	\$79,363,496
3	Maintenance and Repair- Residential	\$38,959,120
4	Real Estate	\$38,338,472
5	State and Local Electric Utilities	\$31,803,536
6	Services To Buildings	\$26,373,582
7	Wholesale Trade	\$24,881,010
8	Doctors and Dentists	\$24,737,060
9	Engineering- Architectural Services	\$24,625,966
10	Eating & Drinking	\$21,999,388
11	Banking	\$18,538,358
12	Automotive Dealers & Service Stations	\$14,458,126
13	Hospitals	\$14,080,780
14	Management and Consulting Services	\$12,822,703
15	Miscellaneous Retail	\$12,445,220
16	Motor Freight Transport and Warehousing	\$11,774,055
17	Communications- Except Radio and TV	\$11,096,186
18	Food Stores	\$9,724,847
19	Computer and Data Processing Services	\$9,611,667
20	Insurance Carriers	\$9,238,672
21	Hotels and Lodging Places	\$9,041,619
22	Cyclic Crudes- Interm. & Indus. Organic	\$8,611,969
23	Other State and Local Govt Enterprises	\$8,532,171
24	Legal Services	\$8,339,623
25	Personnel Supply Services	\$7,906,235
26	Accounting- Auditing and Bookkeeping	\$7,577,782
27	Motor Vehicle Parts and Accessories	\$7,198,248
28	General Merchandise Stores	\$6,944,802
29	Electric Services	\$5,979,314
30	Automobile Repair and Services	\$5,733,524
31	Other Medical and Health Services	\$5,098,404
32	State/Local Govt NonEducation	\$4,898,684
33	U.S. Postal Service	\$4,706,808
34	Furniture & Home Furnishings Stores	\$4,218,284
35	Apparel & Accessory Stores	\$4,194,456
36	Building Materials & Gardening	\$3,907,786
37	Sanitary Services and Steam Supply	\$3,811,336
38	Amusement and Recreation Services- N.E.C.	\$3,455,885
39	Credit Agencies	\$3,331,537
40	Security and Commodity Brokers	\$3,247,531

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Naval Weapons Station Operations

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$288,908,992
2 Other Business Services	\$262,378,768
3 Maintenance and Repair- Residential	\$126,828,784
4 Real Estate	\$110,062,520
5 Services To Buildings	\$86,843,880
6 Engineering- Architectural Services	\$81,399,160
7 Wholesale Trade	\$72,050,928
8 Doctors and Dentists	\$67,978,632
9 State and Local Electric Utilities	\$67,574,968
10 Eating & Drinking	\$60,680,704
11 Banking	\$52,181,176
12 Automotive Dealers & Service Stations	\$41,040,200
13 Management and Consulting Services	\$40,669,380
14 Hospitals	\$39,987,760
15 Motor Freight Transport and Warehousing	\$35,113,980
16 Miscellaneous Retail	\$34,910,144
17 Communications- Except Radio and TV	\$32,499,780
18 Computer and Data Processing Services	\$28,569,714
19 Food Stores	\$26,945,354
20 Hotels and Lodging Places	\$26,549,182
21 Insurance Carriers	\$24,572,028
22 Personnel Supply Services	\$24,261,524
23 Legal Services	\$23,889,334
24 Accounting- Auditing and Bookkeeping	\$23,677,528
25 Cyclic Crudes- Interm. & Indus. Organic Chem.	\$23,514,414
26 Other State and Local Govt Enterprises	\$22,615,178
27 Motor Vehicle Parts and Accessories	\$19,778,076
28 General Merchandise Stores	\$19,122,054
29 Electric Services	\$16,453,667
30 Automobile Repair and Services	\$16,443,558
31 U.S. Postal Service	\$14,170,329
32 Other Medical and Health Services	\$14,111,429
33 Sanitary Services and Steam Supply	\$12,165,942
34 State/Local Govt NonEducation	\$11,976,240
35 Furniture & Home Furnishings Stores	\$11,827,050
36 Apparel & Accessory Stores	\$11,653,954
37 Building Materials & Gardening	\$11,157,521
38 Other Educational Services	\$9,681,089
39 Credit Agencies	\$9,413,281
40 Equipment Rental and Leasing	\$9,370,392

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Military-Related Visitors to Charleston

Industry	Annual Sales
1 Hotels and Lodging Places	\$10,744,228
2 Eating & Drinking	\$5,699,741
3 Real Estate	\$1,381,546
4 Wholesale Trade	\$602,786
5 Banking	\$538,087
6 Doctors and Dentists	\$515,641
7 Hospitals	\$382,031
8 Maintenance and Repair Other Facilities	\$377,587
9 Other Business Services	\$339,311
10 Management and Consulting Services	\$312,979
11 Motor Freight Transport and Warehousing	\$306,297
12 Personnel Supply Services	\$269,753
13 Communications- Except Radio and TV	\$253,845
14 Automotive Dealers & Service Stations	\$253,337
15 Computer and Data Processing Services	\$240,133
16 Miscellaneous Retail	\$240,004
17 Legal Services	\$218,637
18 Food Stores	\$196,194
19 Other State and Local Govt Enterprises	\$194,501
20 Credit Agencies	\$187,626
21 Electric Services	\$186,071
22 Services To Buildings	\$180,471
23 Maintenance and Repair- Residential	\$173,499
24 Accounting- Auditing and Bookkeeping	\$153,040
25 Automobile Repair and Services	\$132,817
26 Radio and TV Broadcasting	\$131,416
27 General Merchandise Stores	\$131,068
28 Arrangement Of Passenger Transportation	\$128,479
29 Insurance Carriers	\$126,929
30 U.S. Postal Service	\$115,223
31 Other Medical and Health Services	\$113,223
32 Newspapers	\$103,421
33 Cyclic Crudes- Interm. & Indus. Organic	\$103,106
34 Sanitary Services and Steam Supply	\$94,714
35 Detective and Protective Services	\$91,910
36 Furniture & Home Furnishings Stores	\$82,995
37 Motor Vehicle Parts and Accessories	\$81,346
38 Apparel & Accessory Stores	\$80,991
39 Fluid Milk	\$80,729
40 State and Local Electric Utilities	\$75,207

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Military Retirees, Charleston

	Industry	Annual Sales
1	Real Estate	\$23,447,154
2	Doctors and Dentists	\$19,987,184
3	Eating & Drinking	\$17,448,546
4	Wholesale Trade	\$14,728,787
5	Banking	\$12,646,078
6	Automotive Dealers & Service Stations	\$9,841,790
7	Hospitals	\$9,365,546
8	Miscellaneous Retail	\$9,047,562
9	Insurance Carriers	\$8,724,838
10	Food Stores	\$7,544,486
11	Cyclic Crudes- Interm. & Indus. Organic	\$7,155,611
12	State/Local Govt NonEducation	\$6,269,914
13	Communications- Except Radio and TV	\$6,172,314
14	Motor Vehicle Parts and Accessories	\$5,962,848
15	Other State and Local Govt Enterprises	\$5,666,378
16	General Merchandise Stores	\$5,576,226
17	Motor Freight Transport and Warehousing	\$5,347,311
18	Hotels and Lodging Places	\$4,933,884
19	Electric Services	\$4,806,281
20	Legal Services	\$4,778,893
21	Maintenance and Repair- Residential	\$4,550,374
22	Maintenance and Repair Other Facilities	\$4,391,206
23	Other Medical and Health Services	\$3,962,634
24	Other Business Services	\$3,928,222
25	Automobile Repair and Services	\$3,627,804
26	Computer and Data Processing Services	\$3,485,801
27	Apparel & Accessory Stores	\$3,212,434
28	Apparel Made From Purchased Materials	\$3,187,045
29	Furniture & Home Furnishings Stores	\$3,072,592
30	Amusement and Recreation Services-	\$3,006,773
31	Insurance Agents and Brokers	\$2,888,362
32	Fluid Milk	\$2,819,077
33	Management and Consulting Services	\$2,610,979
34	Building Materials & Gardening	\$2,557,631
35	Personnel Supply Services	\$2,475,153
36	Credit Agencies	\$2,310,205
37	Security and Commodity Brokers	\$2,292,857
38	Accounting- Auditing and Bookkeeping	\$2,045,320
39	U.S. Postal Service	\$1,954,892
40	State and Local Electric Utilities	\$1,949,225

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

**Annual Sales at Local Businesses due to Overall Military Presence, Charleston Area
Includes Effects of AFB and NWS Operations, Military Visitors, and Area Retirees**

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$382,428,673
2 Other Business Services	\$346,009,797
3 Real Estate	\$173,229,692
4 Maintenance and Repair- Residential	\$170,511,777
5 Services To Buildings	\$114,910,118
6 Doctors and Dentists	\$113,218,517
7 Wholesale Trade	\$112,263,511
8 Engineering- Architectural Services	\$107,073,611
9 Eating & Drinking	\$105,828,379
10 State and Local Electric Utilities	\$101,402,936
11 Banking	\$83,903,699
12 Automotive Dealers & Service Stations	\$65,593,453
13 Hospitals	\$63,816,117
14 Miscellaneous Retail	\$56,642,930
15 Management and Consulting Services	\$56,416,041
16 Motor Freight Transport and Warehousing	\$52,541,643
17 Hotels and Lodging Places	\$51,268,913
18 Communications- Except Radio and TV	\$50,022,125
19 Food Stores	\$44,410,881
20 Insurance Carriers	\$42,662,467
21 Computer and Data Processing Services	\$41,907,315
22 Cyclic Crudes- Interm. & Indus. Organic Chem.	\$39,385,100
23 Legal Services	\$37,226,487
24 Other State and Local Govt Enterprises	\$37,008,228
25 Personnel Supply Services	\$34,912,665
26 Accounting- Auditing and Bookkeeping	\$33,453,670
27 Motor Vehicle Parts and Accessories	\$33,020,518
28 General Merchandise Stores	\$31,774,150
29 Electric Services	\$27,425,333
30 Automobile Repair and Services	\$25,937,703
31 Other Medical and Health Services	\$23,285,690
32 State/Local Govt NonEducation	\$23,144,838
33 U.S. Postal Service	\$20,947,252
34 Furniture & Home Furnishings Stores	\$19,200,921
35 Apparel & Accessory Stores	\$19,141,835
36 Building Materials & Gardening	\$17,696,728
37 Sanitary Services and Steam Supply	\$16,848,509
38 Amusement and Recreation Services- N.E.C.	\$15,884,352
39 Credit Agencies	\$15,242,649
40 Security and Commodity Brokers	\$14,624,400

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Economic Impacts for the Lowcountry Region

SUMMARY OF MILITARY IMPACTS IN THE LOWCOUNTRY

BASE OPERATIONS

Marine Corps Air Station

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$172,591,529	\$118,049,690	\$290,641,219
Employment	5,125	3,470	8,595
Labor Income	\$142,500,000	\$98,915,978	\$241,415,978

Marine Corps Recruit Depot

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$150,117,662	\$100,405,621	\$250,523,283
Employment	2,705	2,992	5,697
Labor Income	\$134,900,000	\$84,669,348	\$219,569,348

Naval Hospital

	Direct Impacts	Multiplier Impacts	Total Impacts
Business Sales	\$53,992,691	\$36,062,894	\$90,055,585
Employment	1,120	1,025	2,145
Labor Income	\$33,500,000	\$30,802,580	\$64,302,580

VISITORS

Marine Corps Recruit Depot

	Total Impacts
Business Sales	\$10,963,274
Employment	199
Labor Income	\$4,337,917

RETIREE SPENDING

	Total Impacts	Retiree Income
Business Sales	\$75,335,692	
Employment	903	
Labor Income	\$24,945,877	\$60,000,000

OVERALL MILITARY IMPACT ON THE LOWCOUNTRY (BASE OPERATIONS AT MCAS, MCRD, MCRD VISITORS, AREA MILITARY RETIREES)

	Total Impacts
Business Sales	\$717,519,053
Employment	17,539
Personal Income	\$614,571,700

All dollar figures are in 2003 dollars. For base operations impacts, the direct impacts include: base expenditures in the local economy, the spending of personnel payroll in the local economy, and military and civilian employment directly at the base. MCRD visitor impacts are based on an estimate of \$6.5 million in visitor spending annually. The \$10.96 million impact of visitor spending includes the \$6.5 million in direct spending and the multiplier effects of this direct expenditure. The retiree spending impacts are based on the local expenditures of retirees living in the 299 3-digit zip code area.

Annual Sales at Local Businesses due to MCAS Operations

Industry	Annual Sales
1 Maintenance and Repair Other Facilities	\$22,854,290
2 Other Business Services	\$22,599,938
3 Real Estate	\$16,559,736
4 Eating & Drinking	\$11,308,756
5 Maintenance and Repair- Residential	\$11,220,838
6 Doctors and Dentists	\$10,596,819
7 Wholesale Trade	\$8,655,669
8 State and Local Electric Utilities	\$8,255,198
9 Communications- Except Radio and TV	\$7,525,192
10 Banking	\$7,446,452
11 Services To Buildings	\$6,845,627
12 Automotive Dealers & Service Stations	\$6,136,297
13 Miscellaneous Retail	\$5,551,071
14 Food Stores	\$4,771,349
15 Hospitals	\$4,754,697
16 Insurance Carriers	\$4,589,648
17 Electric Services	\$4,216,401
18 Management and Consulting Services	\$4,210,117
19 Engineering- Architectural Services	\$4,143,626
20 Hotels and Lodging Places	\$3,867,895
21 Other State and Local Govt Enterprises	\$3,860,263
22 State/Local Govt NonEducation	\$3,820,325
23 Cyclic Crudes- Interm. & Indus. Organic	\$3,806,101
24 Motor Freight Transport and Warehousing	\$3,533,490
25 General Merchandise Stores	\$3,331,053
26 Legal Services	\$2,887,716
27 Credit Agencies	\$2,436,092
28 Automobile Repair and Services	\$2,396,261
29 Amusement and Recreation Services-	\$2,294,454
30 Accounting- Auditing and Bookkeeping	\$2,282,224
31 Apparel & Accessory Stores	\$2,123,925
32 Other Medical and Health Services	\$2,094,866
33 Furniture & Home Furnishings Stores	\$1,983,380
34 Transportation Equipment- N.E.C	\$1,955,925
35 Apparel Made From Purchased Materials	\$1,858,238
36 Building Materials & Gardening	\$1,813,635
37 Security and Commodity Brokers	\$1,787,570
38 Commercial Printing	\$1,651,870
39 Miscellaneous Plastics Products	\$1,518,635
40 Insurance Agents and Brokers	\$1,471,669

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses doe to MCRD Operations

Industry	Annual Sales
1 Real Estate	\$15,190,573
2 Maintenance and Repair Other Facilities	\$14,901,221
3 Other Business Services	\$14,756,347
4 Eating & Drinking	\$10,778,502
5 Doctors and Dentists	\$10,621,225
6 Maintenance and Repair- Residential	\$7,944,896
7 Wholesale Trade	\$7,854,052
8 Banking	\$7,314,198
9 Communications- Except Radio and TV	\$6,520,665
10 Automotive Dealers & Service Stations	\$5,722,776
11 State and Local Electric Utilities	\$5,419,029
12 Miscellaneous Retail	\$5,221,782
13 Insurance Carriers	\$4,821,881
14 Hospitals	\$4,608,007
15 Services To Buildings	\$4,514,824
16 Food Stores	\$4,505,698
17 State/Local Govt NonEducation	\$3,956,912
18 Electric Services	\$3,929,396
19 Cyclic Crudes- Interm. & Indus. Organic	\$3,701,116
20 Other State and Local Govt Enterprises	\$3,563,343
21 Hotels and Lodging Places	\$3,530,598
22 Management and Consulting Services	\$3,180,524
23 General Merchandise Stores	\$3,174,971
24 Motor Freight Transport and Warehousing	\$3,102,712
25 Legal Services	\$2,677,408
26 Engineering- Architectural Services	\$2,674,520
27 Automobile Repair and Services	\$2,226,730
28 Credit Agencies	\$2,220,334
29 Amusement and Recreation Services-	\$2,206,687
30 Other Medical and Health Services	\$2,084,817
31 Apparel & Accessory Stores	\$1,994,974
32 Transportation Equipment- N.E.C	\$1,914,951
33 Furniture & Home Furnishings Stores	\$1,855,882
34 Apparel Made From Purchased Materials	\$1,820,632
35 Accounting- Auditing and Bookkeeping	\$1,818,896
36 Building Materials & Gardening	\$1,661,622
37 Security and Commodity Brokers	\$1,584,289
38 Insurance Agents and Brokers	\$1,546,135
39 Commercial Printing	\$1,410,349
40 Miscellaneous Plastics Products	\$1,402,244

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Naval Hospital

	Industry	Annual
1	Real Estate	\$11,028,248
2	Management and Consulting Services	\$6,253,460
3	Eating & Drinking	\$3,823,725
4	Wholesale Trade	\$3,229,790
5	Communications- Except Radio and TV	\$2,958,774
6	Doctors and Dentists	\$2,879,698
7	Other Business Services	\$2,437,575
8	Cyclic Crudes- Interm. & Indus. Organic	\$2,435,208
9	Banking	\$2,339,082
10	Maintenance and Repair Other Facilities	\$1,850,309
11	Legal Services	\$1,701,772
12	Services To Buildings	\$1,626,072
13	Hotels and Lodging Places	\$1,592,501
14	Electric Services	\$1,582,246
15	Automotive Dealers & Service Stations	\$1,567,696
16	Miscellaneous Retail	\$1,455,074
17	Motor Freight Transport and Warehousing	\$1,436,239
18	Hospitals	\$1,339,372
19	Maintenance and Repair- Residential	\$1,319,854
20	Food Stores	\$1,278,777
21	Insurance Carriers	\$1,259,935
22	Other State and Local Govt Enterprises	\$1,182,429
23	State/Local Govt NonEducation	\$1,085,684
24	U.S. Postal Service	\$1,075,126
25	Commercial Printing	\$904,114
26	Accounting- Auditing and Bookkeeping	\$896,912
27	General Merchandise Stores	\$881,606
28	Automobile Repair and Services	\$841,365
29	Credit Agencies	\$839,235
30	Security and Commodity Brokers	\$746,805
31	Miscellaneous Plastics Products	\$670,128
32	Amusement and Recreation Services-	\$629,470
33	Other Medical and Health Services	\$584,813
34	Broadwoven Fabric Mills and Finishing	\$571,230
35	Apparel & Accessory Stores	\$565,449
36	Furniture & Home Furnishings Stores	\$524,480
37	Periodicals	\$516,936
38	Landscape and Horticultural Services	\$503,624
39	Transportation Equipment- N.E.C	\$479,341
40	Miscellaneous Publishing	\$474,157

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to MCRD Visitors

Industry	Annual Sales
1 Miscellaneous Retail	\$2,429,525
2 Hotels and Lodging Places	\$2,369,552
3 Eating & Drinking	\$2,235,967
4 Real Estate	\$524,818
5 Communications- Except Radio and TV	\$180,853
6 Wholesale Trade	\$152,252
7 Other Business Services	\$139,908
8 Banking	\$137,623
9 Maintenance and Repair Other Facilities	\$123,764
10 Electric Services	\$117,803
11 Doctors and Dentists	\$106,796
12 Management and Consulting Services	\$105,382
13 Credit Agencies	\$88,578
14 Hospitals	\$82,667
15 Maintenance and Repair- Residential	\$78,450
16 Automotive Dealers & Service Stations	\$77,763
17 Motor Freight Transport and Warehousing	\$74,108
18 Food Stores	\$73,007
19 Other State and Local Govt Enterprises	\$65,365
20 Legal Services	\$61,053
21 Services To Buildings	\$55,049
22 Accounting- Auditing and Bookkeeping	\$54,072
23 Commercial Printing	\$51,007
24 Automobile Repair and Services	\$44,270
25 Miscellaneous Publishing	\$43,105
26 General Merchandise Stores	\$42,712
27 Radio and TV Broadcasting	\$39,560
28 Periodicals	\$39,365
29 Advertising	\$36,511
30 Amusement and Recreation Services-	\$35,942
31 Apparel & Accessory Stores	\$32,768
32 U.S. Postal Service	\$31,891
33 Motion Pictures	\$31,529
34 State and Local Electric Utilities	\$31,171
35 Furniture & Home Furnishings Stores	\$30,414
36 Building Materials & Gardening	\$29,606
37 Security and Commodity Brokers	\$28,701
38 Other Medical and Health Services	\$26,280
39 Laundry- Cleaning and Shoe Repair	\$25,560
40 Sanitary Services and Steam Supply	\$25,511

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

Annual Sales at Local Businesses due to Military Retirees, Beaufort Area

Industry	Annual Sales
1 Real Estate	\$5,197,039
2 Doctors and Dentists	\$4,048,043
3 Eating & Drinking	\$4,025,851
4 Wholesale Trade	\$2,816,486
5 Banking	\$2,579,290
6 Automotive Dealers & Service Stations	\$2,101,054
7 Communications- Except Radio and TV	\$2,022,859
8 Miscellaneous Retail	\$1,947,998
9 Insurance Carriers	\$1,853,890
10 Food Stores	\$1,691,737
11 Hospitals	\$1,680,899
12 State/Local Govt NonEducation	\$1,608,558
13 Cyclic Crudes- Interm. & Indus. Organic	\$1,508,058
14 Electric Services	\$1,444,112
15 Other State and Local Govt Enterprises	\$1,254,721
16 General Merchandise Stores	\$1,214,683
17 Hotels and Lodging Places	\$1,141,499
18 Maintenance and Repair- Residential	\$1,097,364
19 Motor Freight Transport and Warehousing	\$978,735
20 Other Business Services	\$937,272
21 Maintenance and Repair Other Facilities	\$930,791
22 Legal Services	\$911,301
23 Amusement and Recreation Services-	\$826,825
24 Transportation Equipment- N.E.C	\$794,309
25 Automobile Repair and Services	\$781,153
26 Other Medical and Health Services	\$780,243
27 Credit Agencies	\$777,482
28 Apparel Made From Purchased Materials	\$770,208
29 Apparel & Accessory Stores	\$741,393
30 Furniture & Home Furnishings Stores	\$684,687
31 Management and Consulting Services	\$615,734
32 Security and Commodity Brokers	\$596,417
33 Insurance Agents and Brokers	\$594,449
34 Building Materials & Gardening	\$587,257
35 Miscellaneous Plastics Products	\$525,807
36 Broadwoven Fabric Mills and Finishing	\$473,919
37 Miscellaneous Publishing	\$458,238
38 Accounting- Auditing and Bookkeeping	\$431,906
39 Fluid Milk	\$423,793
40 Meat Packing Plants	\$421,118

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.

**Annual Sales at Local Businesses due to Overall Military Presence, Beaufort Area
Includes Effects of MCAS, MCRD and NH Operations, MCRD Visitors, and Area Retirees**

Industry	Annual Sales
1 Real Estate	\$48,500,414
2 Other Business Services	\$40,871,040
3 Maintenance and Repair Other Facilities	\$40,660,375
4 Eating & Drinking	\$32,172,801
5 Doctors and Dentists	\$28,252,581
6 Wholesale Trade	\$22,708,249
7 Maintenance and Repair- Residential	\$21,661,402
8 Banking	\$19,816,645
9 Communications- Except Radio and TV	\$19,208,343
10 Miscellaneous Retail	\$16,605,450
11 Automotive Dealers & Service Stations	\$15,605,586
12 State and Local Electric Utilities	\$14,506,476
13 Management and Consulting Services	\$14,365,217
14 Services To Buildings	\$13,369,724
15 Insurance Carriers	\$12,543,899
16 Hotels and Lodging Places	\$12,502,045
17 Hospitals	\$12,465,642
18 Food Stores	\$12,320,568
19 Cyclic Crudes- Interm. & Indus. Organic	\$11,461,192
20 Electric Services	\$11,289,958
21 State/Local Govt NonEducation	\$10,471,479
22 Other State and Local Govt Enterprises	\$9,926,121
23 Motor Freight Transport and Warehousing	\$9,125,284
24 General Merchandise Stores	\$8,645,025
25 Legal Services	\$8,239,250
26 Engineering- Architectural Services	\$7,255,072
27 Credit Agencies	\$6,361,721
28 Automobile Repair and Services	\$6,289,779
29 Amusement and Recreation Services-	\$5,993,378
30 Other Medical and Health Services	\$5,571,019
31 Accounting- Auditing and Bookkeeping	\$5,484,010
32 Apparel & Accessory Stores	\$5,458,509
33 Transportation Equipment- N.E.C	\$5,147,216
34 Furniture & Home Furnishings Stores	\$5,078,843
35 Apparel Made From Purchased Materials	\$4,917,458
36 Security and Commodity Brokers	\$4,743,782
37 Building Materials & Gardening	\$4,561,756
38 Commercial Printing	\$4,435,742
39 Miscellaneous Plastics Products	\$4,128,940
40 Insurance Agents and Brokers	\$4,022,197

The sales figures represent total sales, including the direct and multiplier-generated sales. These industries are the 40 most affected out of a total of more than 250 affected industries.