

**LOWCOUNTRY ECONOMIC
DEVELOPMENT DISTRICT**

**COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY**

PREPARED BY

LOWCOUNTRY COUNCIL OF GOVERNMENTS

REVISED SEPTEMBER 2011

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I. INTRODUCTION

The Lowcountry Council of Governments (LCOG) is officially designated as the US Department of Commerce/Economic Development Administration's (EDA) district representative and administers the Comprehensive Economic Development Strategy (CEDS) for the Lowcountry Economic Development District (LEDD). The LEDD is comprised of the Counties of Beaufort, Colleton, Hampton and Jasper. The CEDS is a local planning process designed to develop strategies, which can stabilize or expand economies through job creation and diversification.

This document:

1. presents the regional trends and conditions that affect and impact the local economy,
2. evaluates the economy of the LEDD,
3. identifies possible goals and solutions which could address the area's development potential and shortcomings,
4. offers strategies and action plans for implementing a planned program of growth for the future; and
5. outlines the standards for the evaluation of the achievements of the program.

Public works and economic development projects funded by the EDA must be consistent with the district's CEDS. Annually, LCOG summarizes and evaluates the past year's activities and when appropriate, presents new or modified program strategies. The CEDS and accompanying annual report help to maintain the district's eligibility for EDA funded projects.

Funding for the CEDS is through the EDA planning assistance grant under Section 301(b) of the Public Works and Economic Development Act of 1965, as amended.

II. ORGANIZATION AND MANAGEMENT

LCOG is one of ten regional councils in South Carolina. LCOG provides a method for intergovernmental coordination and cooperation beyond the local level. Initially formed as the Lowcountry Regional Planning Commission (LRPC) on April 22, 1969, in accordance with South Carolina law, LCOG's purpose is to:

1. undertake multi-purpose, area-wide development planning;
2. support economic, natural, social, physical and governmental development activities in the area; and
3. promote cooperation and coordination among the various public and private agencies and organizations in the area. In 1976, the name "Council of Governments" was adopted to give a more common recognition to all regional councils in South Carolina and their objectives.

LCOG's expertise lies in providing professional and technical guidance and assistance in various governmental activities, particularly the area of economic development. LCOG undertakes projects that use the resources of the region to meet and overcome common problems. In 1991,

LCOG further clarified its role in the region by establishing a mission statement and goals for program areas. LCOG's mission is to:

Improve the Lowcountry Region's livability through cooperative intergovernmental relationships and responsible development of resources.

LCOG's program areas and goals:

- **Community and Economic Development:** Advocate progressive economic policies and administer sound economic and community development programs.
- **Health and Human Resources:** Coordinate and support a continuum of human resource service systems.
- **Workforce Development:** Coordinate and consolidate employment and training services in order to meet the needs of area employers and job seekers.
- **Growth Management and the Environment:** Provide responsible development guidance, environmental management, and stimulate recreational and cultural opportunities.
- **Administration and Support:** Provide a foundation for successful council and local government program development and implementation.

LCOG's Board of Directors is comprised of thirty-three (33) representatives, which are appointed by elected officials, and come to the board with varied occupational backgrounds. A full listing of the current board roster is in Appendix A.

For Beaufort County, seven of the thirteen members are appointed by Beaufort County Council, one member appointed by the Beaufort City Council, one member appointed by the Port Royal Town Council, two members appointed by the Hilton Head Island Town Council, one member appointed by the Bluffton Town Council, and one member appointed by the Beaufort County Legislative Delegation. The member composition for the eight Colleton County members includes five appointed by Colleton County Council, one appointed by the Walterboro City Council, one appointed by the Cottageville Town Council (non-voting board member), and one appointed by the Edisto Beach Town Council (non-voting board member). From Hampton County, the seven members include three appointed by Hampton County Council, one appointed by the Estill Town Council, one appointed by the Hampton Town Council, one appointed by the Varnville Town Council, and one appointed by the Yemassee Town Council (non-voting board member). The five Jasper County members include three appointed by Jasper County Council and one each appointed by the Hardeeville City Council and the Ridgeland Town Council.

III. THE LOWCOUNTRY ECONOMIC DEVELOPMENT DISTRICT AND ITS ECONOMY

A. Background Information/Historical Context

1. General Description

The LEDD, comprised of the Counties of Beaufort, Colleton, Hampton and Jasper, is an area endowed with an abundance of pristine natural resources and a rich cultural and historic heritage. The district is located in the southern corner of the state and spans approximately 3,306 square miles in a coastal plain region. The center of the district is located roughly 40 miles northeast of the City of Savannah, Georgia, 55 miles southwest of the City of Charleston and 100 miles south of the City of Columbia. Interstate 95, the primary East Coast north-south transportation corridor transects the region.

Three of the four Lowcountry counties, all of which are bounded by rivers, have areas that adjoin the Atlantic Ocean. Nearly 30 miles of the eastern coast of Beaufort County and tips of Colleton and Jasper Counties abut the Atlantic Ocean. The southern boundary of Jasper and Hampton Counties is the Savannah River, which also represents the border between the States of Georgia and South Carolina. Hampton County's northern boundary is the Combahee River while Colleton County's northern boundary is the Edisto River.

2. LEDD Land Use

The LEDD contains extensive wetlands, marshes and swamps, which have made commercial and residential development efforts more complicated in many areas. Generally, the Lowcountry area, with the exception of Beaufort County, is sparsely populated. Recreational activities such as, fishing, boating and hunting have profited from the abundance of natural resources, low density of population and mild climate.

TABLE I: Area and Density of Lowcountry Counties

County	2000 Population	Total Square Miles	Land Area (Sq. Mi.)	Water Area (Sq. Mi.)	Population Per Sq. mi. (land area)	% Change from '90-00
Beaufort	120,937	923	587.03	335.98	206.02	39.9%
Colleton	38,264	1132.05	1056.48	75.57	36.22	11.3%
Hampton	21,386	562.72	559.93	2.78	38.19	17.6%
Jasper	20,678	685.84	654.33	31.51	31.60	33.5%
LEDD	201,265	3303.61	2857.77	445.84	70.43	30.3%

Source: The US Bureau of the Census, 2000.

Geographically, Colleton County is the largest area in the region, followed by Beaufort County (See Table I). The most densely populated county in the region is Beaufort whose density is more than five times greater than Colleton, Hampton and Jasper Counties and 27 percent higher than the state average of 115.8 persons per square mile. Based on the State of South Carolina's Job Tax Credit Classifications for 2007, Hampton is classified as a "Distressed" county, Colleton and Jasper are "Under Developed" counties, while Beaufort County is classified as "Moderately Developed". In addition, roughly one-third of Beaufort County's total area is water while the total area of each of the other three counties is less than 7 percent water.

Over the last 200 years, extraordinary circumstances have altered land use in the Lowcountry. During the first half of the 19th century, cotton replaced rice as the region's chief crop and the Lowcountry evolved into an area that contained large, wealthy cotton plantations. Following the Civil War, during and after Reconstruction, the South entered a devastating and prolonged economic collapse. For the next 80 years, until World War II, the Lowcountry was an area that was substantially rural and economically depressed.

Finally, in the 1950's, the Lowcountry began to reemerge economically. Farm yields increased despite a drop in the percent of land farmed. Between 1959 and 1987, the percent of farm land was cut nearly in half (from 47.2 to 24.6 percent) in South Carolina. Over the same period, the percent of land farmed in Colleton County declined from 48.7 to 19.8 percent; the decline in Jasper County was minimal, 26.8 to 24.4 percent. Beaufort County declined from 28 to 14.6 percent and Hampton County from 55.3 to 29.1 percent. (U.S. Bureau of Census, Census of Agriculture, 1959 and 1987)

Agriculture and forestry have been mainstays of the economy since the late 1600's and continue to dominate the economies of Colleton, Hampton and Jasper Counties. However over the last 30 years in the Lowcountry, residential and commercial development has increasingly claimed the land in Beaufort County and in southern Jasper County. This trend is also starting to be seen in more recent years in the balance of Jasper County, Colleton and Hampton counties.

Along the eastern seaboard from Georgia north, the largest land use is forests. Nearly two-thirds of the land in the Lowcountry is classified as forest, totaling 1,157,823 acres in the four-county area. (U. S. Department of Agriculture, Forest Service, Forest Statistics for South Carolina, 1993, Resource Bulletin SE-141, November 1993)

Beaufort County. Beaufort County, named for Lord Proprietor Henry Somerset, Duke of Beaufort, was officially established in 1769. Much of Beaufort County's 923 square mile area is made up of over sixty islands, marshes, creeks, swamps and inlets. Water covers approximately one-third of the county. Beaufort County is divided into northern and southern areas by the Broad River, which empties into the Atlantic Ocean at one of the county's two sounds, Port Royal. The Combahee River joins the Coosaw River to flow into the ocean at St. Helena Sound.

The northern area of Beaufort County includes Port Royal Island, Lady's Island, and St. Helena Island. Port Royal Island, the largest and most populated island, contains approximately 56,987 acres of which 85 percent has been developed. The City of Beaufort and the Town of Port Royal are located on Port Royal Island. Immediately east of Port Royal Island is Lady's Island, a rapidly-growing residential area in the northern area. The City of Beaufort serves as the county seat. East of Lady's Island is the St. Helena Island district that includes the seas islands of St. Helena, Hunting Island (a State Park) and Fripp Island (a Planned Unit Development).

Major population centers in the southern area of Beaufort County are the Town of Hilton Head Island, the Town of Bluffton and the US Highway 278 Corridor between Hilton Head and I-95 in Jasper County. Hilton Head Island is the most densely populated and commercialized district in the southern region largely because it is a major international resort and tourist destination.

Colleton County. Colleton County is one of the three original counties established in South Carolina in 1682. In 1662, King Charles II granted 12,000 acres of land to Sir John Colleton, Lords Proprietor. Colleton County is the fifth largest county in the State, covering 1,056.48

square miles. There is access to the Atlantic Ocean at Edisto Island, but primarily this is an inland agricultural county. The City of Walterboro has been the county seat since 1822.

Hampton County. Hampton County was created in 1878 after residents petitioned to break away from Beaufort County and establish their own county seat. The county is named for General Wade Hampton, one of South Carolina's greatest statesmen and military leaders. The county seat is located in the Town of Hampton. Roughly 68 percent of the 563 square miles land area is forested which along with agriculture dominates the county's land use.

Jasper County. Formed from parts of Beaufort and Hampton Counties, Jasper County was established in 1912. The county is named for a Revolutionary War hero Sergeant William Jasper. One of the signers of the Declaration of Independence Thomas Heyward, Jr. also came from Jasper County. The Town of Ridgeland serves as the seat of government for Jasper County. Traditionally, Jasper County's land has been used for forestry and agriculture. However, southern Jasper County is experiencing significant growth due in part to the growth along the US Hwy 278 corridor and its proximity to Savannah.

3. Natural Resources/Climate and Geography

The Lowcountry Region is part of the Southern Climatic Division of the State of South Carolina. The region features a coastal climate that is characterized by hot, humid summers and cool winters. According to the U. S. Department of Commerce's National Climatic Data Center, the annual average temperature is 65.4 degrees. The average daily high and low in July are 91 and 72 degrees. The average daily high and low in January are about 59 and 37 degrees. The annual normal precipitation is 50.4 inches.

The counties of the Lowcountry are part of the coastal plain; an area of land created as the result of the ocean's receding. Millions of years ago the Lowcountry was underwater as a part of the continental shelf. The shelf is relatively flat and covered to a large extent by rain-eroded rock fragments from mountains and hills, along with dirt and clay from the lowlands.

The Lowcountry District has no known precious metal deposits, and the soil is composed of primarily sand and some clay materials. The mining or use of these materials is limited to local use in roads and masonry products.

The natural resources of greatest significance are the water, forest, marsh and wetlands in the district. These areas support a wide range of critical habitat for birds, animals and fish. Many in the Lowcountry are concerned and active in protecting these natural resources and habitats. This can be evidenced in many ways including but, not limited to, the ACE Basin Project and the efforts made by several counties to establish land trusts.

4. Environmental Issues

Issue 1: Coastal growth and wastewater disposal

Minimizing the environmental effects of sewage disposal through planning is addressed in Section 208 of the Federal Clean Water Act and implemented at the state level in Area-wide Water Quality Management Plans (208 plans). LCOG administers the 208 plan for South Carolina's Region X. The principle concern of 208 planning in this region is the proper disposal

of treated waste effluent. The Lowcountry area is a region that contains marshes and water bodies with ORW (outstanding resource waters) ratings—the highest quality possible. Consequently, environmentally sound disposal sites for waste effluent are limited in number. Currently, most wastewater in the coastal zone is being sprayed on golf courses and tree farms. However, whether this practice can increase without increasing the risk of contaminating groundwater supplies is not clear. Therefore, the ability to safely dispose of wastewater may become a constraint to coastal development in the near future.

Issue 2: Infrastructure Development for southern Beaufort County and Jasper Counties

Rapid growth is now taking place in Southern Beaufort and Jasper Counties. In anticipation of this rapid growth, the Beaufort Jasper Water Sewer Authority (BJWSA) built a wastewater treatment plant in the Cherry Point area several years ago and brought online a new water distribution system connected to the BJWSA's Chelsea water plant. BJWSA also in recent years built a new water treatment facility along the Savannah River at Purrysburg to meet expanding water needs. South Carolina Electric and Gas, seeing the need to address electricity demand in the Lowcountry built a new natural gas fueled power plant in Purrysburg as well.

In addition to water and sewer infrastructure and electrical needs, the US 278 Connector has been completed to assist with transportation needs in the Lowcountry. The Connector links US 278 to Interstate 95 at exit 8 in Hardeeville. The completion of this highway further prepared the areas of Hilton Head Island, southern Beaufort and Jasper Counties for growth. A main concern here is how to maintain the high environmental quality and visual character of this rapidly developing area and have it coexist with new development.

5. Political Geography

County Governments. The four county governments within the Lowcountry Economic Development District have the council-administrator form of government. Beaufort County is divided into eleven political districts with each district represented by a member on council. Colleton County has five council members elected to four year terms as follows – two from the eastern district, two from the western district and one at-large for the entire county. Hampton and Jasper Counties have five-member county councils that are elected at-large for four-year terms.

Beaufort County Municipal Governments. There are four municipalities in Beaufort County: City of Beaufort, Town of Port Royal, Town of Bluffton and the Town of Hilton Head Island. The City of Beaufort, located on Port Royal Island, is the county seat. It contains 4,566.6 acres. The City has the council-manager form of government. An elected mayor and four council members are elected at-large for four-year terms. The city manager is hired by the council and serves at its pleasure.

The Town of Port Royal, also located on Port Royal Island, contains 1,440 acres. Like the City of Beaufort, the town has the council-manager form of government. An elected mayor and four council members are elected at-large for four-year staggered terms.

The Town of Bluffton, located along the May River in southern Beaufort County has the council-manager form of government. The town has an elected mayor at 4 years and four councilpersons four-year staggered terms, all elected at-large. As a result of recent annexation efforts, the Town

of Bluffton covers 38,012 acres and is the largest municipality in the county in terms of land area.

The largest municipality in the county, in population, is Hilton Head Island. With about 26,900 acres, this is the second largest island on the East Coast of the United States. The Town has the council-manager form of government. The mayor is elected at-large and six council members are elected single member districts (wards) for four-year staggered terms.

Colleton County Municipal Governments. Colleton County has six municipalities: Town of Cottageville, Town of Edisto Beach, Town of Lodge, Town of Smoaks, City of Walterboro and the Town of Williams.

Walterboro, a 2,995.2-acre city located near the center of the county, is the county seat. The seven-member council, including the mayor, is elected at-large. The city operates under the council-manager form of government.

The Town of Edisto Beach operates under the mayor-council form of government. This resort community has a mayor and five council members, all elected at-large.

The small rural Towns of Cottageville, Lodge, Smoaks and Williams all operate under the mayor-council form of government, and have five at-large elected council members and a mayor.

Hampton County Municipal Governments. In Hampton County, there are nine municipalities: The Towns of Brunson, Estill, Furman, Gifford, Hampton, Luray, Scotia, Varnville and Yemassee. The Town of Hampton, a 2,816-acre community, is the county seat. The town operates under the council form of government. The mayor and the four council members are elected at-large and serve four-year staggered terms.

The Town of Estill has the council form of government and employs a city administrator to manage the day-to-day activities of the town. The mayor and four council members are elected at-large.

Brunson, Gifford, Luray, Scotia, and Yemassee are all operated by a mayor-council form of government with mayors and council members elected at-large. Furman and Varnville has the council form of government with a mayor and four councilpersons elected at-large.

Jasper County Municipal Governments. There are two municipalities in Jasper County: Ridgeland and Hardeeville. Ridgeland, centrally located in the county, serves as the county seat. The town has the council form of government with a mayor and four councilpersons elected at-large. The City of Hardeeville, in the southern part of the county has a council-manager form of government and five member councils (including the mayor) who are elected at-large for four-year terms.

6. Population and Labor Force

Population. South Carolina's population has grown by 35 percent between 1970 and 2000 (*See Table II*). Over this same period, the population in Beaufort County grew by 58 percent. Colleton, Hampton and Jasper County's rates of growth were substantially less, at 28, 26 and 43

percent respectively. The rate of population growth in the state was greater in the 1970's than in the 1980's. However, the growth rate has climbed again in the last decade.

TABLE II: Population by County, Region and State, 1970-2000

<i>County</i>	<i>1970</i>	<i>1980</i>	<i>% Change 1970-1980</i>	<i>1990</i>	<i>% Change 1980-1990</i>	<i>2000</i>	<i>% Change 1990-2000</i>
Beaufort	51,136	65,364	27.8%	86,425	32.3%	120,937	39.9%
Colleton	27,622	31,776	15.0%	34,377	8.2%	38,264	11.3%
Hampton	15,878	18,159	14.4%	18,191	0.2%	21,386	17.6%
Jasper	11,885	14,504	22.0%	15,487	6.8%	20,678	33.5%
Region	106,521	129,803	21.9%	154,480	19.0%	201,265	30.3%
State	2,590,713	3,120,729	20.5%	3,486,703	11.7%	4,012,012	15.1%

Source: U.S. Census Bureau, Census of Population for selected years.

The Lowcountry Region as a whole, is experiencing population growth that is consistently greater than the State of South Carolina's. As a region, the population has increased by 30 percent between 1990 and 2000 from 154,480 to 201,265 persons. Most of increase occurred in Beaufort County, which grew by 34,512 persons or about 40 percent through the 1980's.

Our remaining counties all experienced population increases in excess of 10 percent. Colleton County had an increase in population of 11.3 percent. Hampton County's population was increased by 17.6 percent. Jasper County's population grew by 5,191 persons or about 34 percent. While Jasper County's actual numbers are smaller than Beaufort's, it is significant in proportion.

TABLE III: Age Distribution by County, Region and State, 2000*

	<i>0-14</i>	<i>15-24</i>	<i>25-44</i>	<i>45-54</i>	<i>55-64</i>	<i>65+</i>
Beaufort	23,890 (19.7%)	18,724 (15.5%)	32,867 (27.2%)	14,019 (11.6%)	12,683 (10.5%)	18,754 (15.6%)
Colleton	8,659 (22.6%)	4,934 (12.9%)	10,299 (26.9%)	5,478 (14.3%)	3,966 (10.4%)	4,928 (12.9%)
Hampton	4,864 (22.8%)	2,855 (13.4%)	6,342 (29.7%)	2,923 (13.7%)	1,807 (8.4%)	2,595 (12.2%)
Jasper	4,660 (22.4%)	3,010 (14.6%)	6,345 (30.7%)	2,538 (12.3%)	1,856 (8.9%)	2,269 (11.0%)
Region	42,073 (20.9%)	29,523 (14.7%)	55,853 (27.8%)	24,958 (12.4%)	20,312 (10.0%)	28,546 (14.2%)
State	840,401 (20.9%)	577,091 (14.4%)	1,185,955 (29.6%)	550,321 (13.7%)	372,911 (9.3%)	485,333 (12.1%)

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

The median age throughout the United States has continued to rise. In the State of South Carolina, the median age increased from 32.1 to 35.4 years of age between 1990 and 2000. On a county level in the Lowcountry, changes in the median age vary. Beaufort County's median age increased the most, from 30.5 to 35.8 years old. Colleton County's 2000 median age of 36.5 is the highest of the four counties and slightly higher than the state's.

The expanding population of persons age 65 and over supports the increase in median age. Beaufort County has experienced the largest increase in this bracket, with twice the number of persons from ten years earlier. In addition, with the continued development of Sun City Hilton

Head and other residential developments targeted to seniors, the average will increase. The other counties experienced smaller increases.

At the other end of the age spectrum, Beaufort County contains the smallest percentage of population in the youngest age bracket compared to the other three counties. (See Table III.) In Colleton, Hampton and Jasper Counties, the percent of total population, 14 years old or younger, is larger compared to either Beaufort County or the State. On the other hand, the percentage of persons 18 to 64 (the working years) is 1-3 percentage points less than the State's.

The racial composition of the Lowcountry Region has experienced some changes in characteristics that are not unlike what is occurring nationwide. (See Table IV.) Some key characteristics that are slightly different from the State of South Carolina's, the most unique of which is the percentage of Hispanic individuals residing in the area. In the year 2000, 5.2 percent of the population in the Lowcountry is of Hispanic origin. This is over twice the State's rate of 2.4 percent. Even more interesting is the rate by which this increase has occurred. Jasper County has the fastest growing Hispanic population in the Region. From 1990 to 2000 Jasper County's Hispanic population increased sixteen times.

TABLE IV: Racial Mix by County, Region and State, 1990-2000

	Hispanic origin (of any race)		White		Black		American Indian, Eskimo or Aleut		Asian or Pacific Islander	
	Total	%	Total	%	Total	%	Total	%	Total	%
1990										
<i>Beaufort</i>	2,168	2.5%	59,843	68.3%	24,582	28.0%	251	0.3%	813	0.9%
<i>Colleton</i>	53	0.4%	7,161	59.3%	4,811	39.8%	53	0.4%	8	0.1%
<i>Hampton</i>	71	0.4%	8,279	45.3%	9,884	54.1%	6	0.0%	18	0.1%
<i>Jasper</i>	69	0.4%	6,529	42.0%	8,889	57.2%	20	0.1%	32	0.2%
<i>Region</i>	2,361	1.8%	81,812	61.3%	48,166	36.1%	330	0.2%	871	0.7%
<i>State</i>	30,551	0.9%	2,406,974	68.6%	1,039,884	29.6%	8,246	0.2%	22,382	0.6%
2000										
<i>Beaufort</i>	8,208	6.8%	85,451	70.7%	29,005	24.0%	321	0.3%	1,016	0.8%
<i>Colleton</i>	551	1.4%	21,245	55.5%	16,140	42.2%	242	0.6%	112	0.3%
<i>Hampton</i>	547	2.6%	9,173	42.9%	11,906	55.7%	43	0.2%	39	0.2%
<i>Jasper</i>	1,190	5.8%	8,766	42.4%	10,895	52.7%	76	0.4%	102	0.5%
<i>Region</i>	10,496	5.2%	124,635	61.9%	67,946	33.8%	682	0.3%	1,269	0.6%
<i>State</i>	95,076	2.4%	2,652,291	66.1%	1,178,486	29.4%	12,756	0.3%	36,838	0.9%

Source: US Census Bureau, Census of Population, 1990, 2000

Education. Educational attainment, (as measured by the percentage of persons 25 years or older who have four years of high school and with four or more years of college), made great improvement in South Carolina over the last several decades. However, in the Lowcountry, we are for the most part still behind. In Colleton, Hampton and Jasper Counties less than 10 percent of those surveyed have received a bachelor's or professional degree. Depending on the county, the average runs 6 to 7 points behind the state average of 15.8 percent; however, Beaufort County citizens' educational attainment in the same categories is much higher than the state average. (See Table V.)

Table V: Educational Attainment by County, Region and State, 2000*

Attainment Level	Beaufort	Colleton	Hampton	Jasper	Region	State
Less than 9th grade	3,228 (4.1%)	2,516 (10.2%)	1,562 (11.4%)	1,624 (12.4%)	8,930 (6.9%)	215,776 (8.3%)
9th to 12th grade no diploma	6,317 (8.0%)	4,993 (20.2%)	2,958 (21.6%)	2,945 (22.5%)	17,213 (13.2%)	398,503 (15.4%)
High school graduate	18,974 (24.2%)	9,133 (37.0%)	5,161 (37.8%)	4,713 (35.9%)	37,981 (29.2%)	778,054 (30.0%)
Some college, no degree	18,466 (23.5%)	3,958 (16.0%)	2,018 (14.8%)	2,195 (16.7%)	26,637 (20.4%)	500,194 (19.3%)
Associate degree	5,434 (6.9%)	1,263 (5.1%)	592 (4.3%)	490 (3.7%)	7,779 (6.0%)	173,478 (6.7%)
Bachelor's degree	16,952 (21.6%)	1,824 (7.4%)	984 (7.2%)	808 (6.2%)	20,568 (15.8%)	351,526 (13.5%)
Graduate/professional degree	9,131 (8.0%)	1,029 (4.2%)	393 (2.9%)	337 (2.6%)	10,890 (8.4%)	178,529 (6.9%)

Source: U.S. Census Bureau, Census of Population, for selected years.

On the other end of the spectrum in the Lowcountry, the percentage of persons twenty-five years and older with less than a 9th grade education is disconcerting. Colleton, Hampton, and Jasper Counties all have averages higher than the state's average of 8.3 percent.

Workforce. As indicated in Table VI below the vast majority of the labor force in the Lowcountry region is employed. Currently all four counties are experiencing unemployment in the region above the national average of 4.5 percent. Beaufort County maintains the lowest level of unemployment with a rate of 5.0 percent and Hampton County has the highest unemployment of 7.4 percent. However these numbers do not show a clear picture of the problems faced by the Lowcountry, the issue here is not only unemployment but underemployment.

Table VI: Labor Force Data for the Year 2006

County	Labor Force	Total Employment	Unemployment	Percentage Unemployed
Beaufort	60,710	57,670	3,040	5.0
Colleton	16,600	15,470	1,130	6.8
Hampton	7,890	7,300	590	7.4
Jasper	9,940	9,440	500	5.1
Region	95,140	89,880	5,260	5.5
State	2,126,400	1,988,400	138,100	6.5
Nation	152,912,000	146,044,000	6,869,000	4.5

Source: South Carolina Employment Security Commission, Labor Force and Employment 2006. US Department of Labor, Bureau of Labor Statistics (June 2007)

Based on number of employees, five of the eight industry classifications in South Carolina grew during the 1990's for a total gain of 14%. The manufacturing industry recorded a decline of fourteen percent. The number of jobs in the service sector increased and other large gains were recorded in public administration, real estate/finance/insurance, and transportation.

Employment in identified industries in the Lowcountry region is somewhat mixed in terms of type of employment. The only categories in which the region nearly mirrors the State are in the areas of public administration, the service industry, and construction. The percentage of the workforce employed in the manufacturing industry has steadily declined in the region over the past twenty years and currently represents only about 9% of employment in the region. This

decline is 10 percentage points less than the State percentage. Beaufort County has the lowest percentage employed in this field at 4.5 percent while Hampton County has the highest at 22 percent. (See Appendices F & G.)

7. Economy

The survey of average rates of selected occupations (See Table VII) offers a quick overview of some of the similarities and variances that occur in the Lowcountry Region as well as the state and the nation. Similarities in wage rates are most prevalent in the highest and lowest wage rate categories. With the exception of natural resources and mining and manufacturing, Beaufort County's average weekly wage rates are higher than that of Colleton, Hampton and Jasper Counties. Moreover, the rates among the industries varied from county to county. The establishment of wage rates in general is the result of labor supply and demand.

Table VII: Average Weekly Wage Rates by Industry for Non-Agricultural Employees for the Year 2006

<i>Occupation</i>	<i>Beaufort</i>	<i>Colleton</i>	<i>Hampton</i>	<i>Jasper</i>	<i>Region</i>	<i>State</i>	<i>Nation</i>
Natural Resources & Mining	377	642	NA	NA	NA	725	749
Construction	758	552	590	725	464	545	672
Manufacturing	705	737	779	618	607	653	580
Trade, Transportation, & Utilities	526	481	473	NA	677	740	607
Wholesale Trade	1,008	806	776	835	561	691	558
Retail Trade	476	357	366	450	263	306	263
Transportation & Warehousing	579	561	N/A	602	495	654	529
Finance & Insurance	1,135	653	768	1,086	653	768	852
Real Estate	798	427	653	475	537	573	667
Federal Government	769	880	1,043	894	452	515	601
State Government	654	651	610	613			
Local Government	753	512	515	571			

Source: South Carolina Employment Security Commission, Covered Employment and Wages 2006

The lower than average wages that predominate in the Lowcountry region make it difficult for low-to-moderate income families to survive. These families represent a slightly larger portion of the region's population, depending on the county than the State percentage (See Table VIII).

Table VIII: Persons of Low to Moderate Income by County, 2000

<i>County</i>	<i>Persons</i>	<i>Percentage of Population</i>
Beaufort	45,853	40.1%
Colleton	17,912	47.2%
Hampton	9,423	47.9%
Jasper	8,870	45.9%
State	82,058	42.9%
Nation	1,605,899	41.4%

Source: US Census Bureau, 2000 Census Low-Mod Data by county, Minor Civil Division, and Place.

While the number of people living below the poverty level in the Lowcountry region as well as the State of the past several decades has decreased, the area still has a slightly higher than state percentage of people living in poverty. The region as a whole has 14.9 percent of people living below the poverty level compared to the State's 14.1 percent. However, in the majority of the

counties of this region, the percentage of people below poverty is between 6 and 8 percentage points higher than the State proportion. (See Table IX.)

Table IX: Persons Below Poverty Level by County, Region and State, 1969-1999

	1969		1979		1989		1999	
	Total	%	Total	%	Total	%	Total	%
Beaufort	11,993	28.8%	9,751	17.1%	10,801	13.6%	12,194	10.7%
Colleton	10,296	37.6%	8,125	25.7%	7,950	23.4%	8,014	21.1%
Hampton	5,839	36.9%	5,119	28.3%	4,989	27.7%	4,277	21.8%
Jasper	4,526	38.2%	4,150	29.0%	3,866	25.3%	3,996	20.7%
Region	32,654	33.8%	27,145	22.4%	27,606	18.8%	28,481	14.9%
State	594,938	23.0%	500,363	16.6%	517,793	15.4%	547,869	14.1%
Nation	25,420,000	12.6%	29,272,000	13.0%	33,585,00	13.5%	33,899,812	12.4%

Source: U.S. Census Bureau, Census of Population, For selected years.

A comparison of per capita incomes (in current and constant dollars) among the four counties, the state, and the United States (See Tables X & XI) provides insight into the relative economic status of the Lowcountry counties. Based on the per capita income in both constant and current dollars, Beaufort County has a higher per capita income than South Carolina or the US. This is due to the large number of retirees that have moved to Beaufort County and is not indicative of local economic activity.

The counties of Colleton, Hampton and Jasper are behind state and national figures. The contrast in per capita incomes between these three counties and Beaufort County indicates that a wide range of economic well being exists within the region.

Table X: Per Capita Income by County Region and State (Current Dollars), 1979-1999*

County	1979	1989	1999
Beaufort	8,788	18,850	25,377
Colleton	6,089	12,144	14,831
Hampton	6,187	12,040	13,129
Jasper	6,233	11,569	14,161
Region	7,478	15,826	20,918
State	7,558	15,106	18,795
Nation	10,183	19,584	21,587

Source: U.S. Census Bureau, Census of Population for selected years.

Table XI: Per Capita Income by County Region and State (Constant 2006 Dollars), 1979-1999

County	1979	1989	1999
Beaufort	24,403	30,646	30,708
Colleton	16,908	19,744	17,947
Hampton	17,180	19,575	15,887
Jasper	17,308	18,809	17,136
Region	20,765	25,730	25,313
State	20,987	24,559	22,744
Nation	28,277	31,840	26,122

1. Adjusted using Consumer Price Index, US Department of Labor, Bureau of Labor Statistics.

8. Infrastructure and Services

Transportation. The routing of cars, trucks, and railroads is influenced by the extensive marshlands and wetland areas, as well as the many rivers and streams that criss-cross the Lowcountry. Historically, these natural barriers had a great effect on the development and growth of commercial and residential centers. Today, primary and secondary highways serve as connectors between major population areas.

Interstate 95 (I-95), the main eastern seaboard artery built in the late 1960's and early 1970's, transects three of the counties in the four-county district. Each year, more than 14 million cars and trucks pass through Colleton, Hampton and Jasper Counties on I-95¹. Near the center of the LEDD at Exit 33 (US 17 and I-95), roughly 1.5 million vehicles enter or exit I-95. Many of these cars and trucks join with traffic coming from Port Royal Island at Gardens Corner to be part of the roughly 3 million vehicles that travel toward Charleston on US 17 each year.

The largest commercial districts in the region experience the largest volumes of traffic. On and approaching Hilton Head Island along US 278, the average annual daily traffic counts conducted by the SC Department of Transportation (SCDOT) were 50,000 vehicles per day. The average daily traffic counts recorded in and around the City of Beaufort (US 21, SC 170, SC 281 and SC 802) range from around 7,700 to 35,000 vehicles. Most of the other primary roads in Beaufort County have higher average daily traffic counts than what is reported on roads in the other counties.

In Colleton County, the roads (other than I-95) with the highest traffic counts are US 17, US 17-A, SC 63, SC 64 and US 15. US 17-A is the main artery between Charleston and Walterboro, carrying a range of 11,000 to 16,000 vehicles per day.

The areas where the traffic counts are highest in Hampton County are in and near the Towns of Hampton and Varnville along US 278 (6,000 AADT), US 601 (2,700 AADT), and SC 363 (3,850 AADT). The traffic counts for the main north-south corridor, US 321 which passes through the Town of Estill, average around 4,800 AADT.

The most traveled roadway in Jasper County is the Interstate. I-95 carries between 45,000 to 49,000 vehicles per day. Other heavily traveled highways include US 17, US 278, US 321, SC 46, SC 170A, SC 336, and SC 462. Average traffic flows vary from as little as 1,160 AADT on SC 462 in the northern parts of the county to as much as 8,750 AADT on SC 170A. Higher traffic flows exist near and in the Towns of Hardeeville and Ridgeland. The high traffic counts recorded in the rural areas of the county can be attributed to the vehicles that travel between Hilton Head Island and Beaufort and I-95 or Savannah.

Due to the geography of the LEDD and its coastal nature, it is paramount that the transportation system be maintained and improved as needed to meet the demands of a hurricane evacuation when necessary. US 21, I-95, US 278, and US 321 all serve as key evacuation arteries for the LEDD and need to be maintained. LCOG will be updating a regional disaster preparedness plan in the near future which will address specifically evacuation transportation. Also LCOG has

¹ Average Daily Traffic Counts are from 2005 and were prepared by the SC Department of Transportation.

recently completed a Long Range Transportation Plan which recommends heavily weighting projects that address the regions evacuation routes.

Water, Sewer and Solid Waste. Currently there are adequate supplies of potable water in the LEDD. Municipalities in Colleton, Hampton and Jasper Counties and the Beaufort-Jasper Water and Sewer Authority (BJWSA) pump water from the Floridian Aquifer and the Savannah River. Also, in the Town of Hilton Head Island several public service districts provide service. BJWSA serves the faster-growing areas of the LEDD and is meeting current and projected service needs.

Increasing demands on the supply and more stringent regulation of the quality of water has stimulated efforts by public officials all along the eastern seaboard to access new water sources. Some communities in the Lowcountry are concerned about their water supplies largely because of new EPA regulations for water quality, increasing demands on the supply, and recent evidence of salt-water intrusion in some existing wells. Hilton Head Island has decided to reduce its dependence on water from the aquifer by accessing the Savannah River for a new source of water. This can be problematic between South Carolina and Georgia because there are limits to how much water can be pulled from the Savannah River and not damage the ecology of the river.

Generally, increasing demand and diminishing supply, coupled with more sophisticated water-quality testing is increasing the cost of water along the coast. In most rural areas, households depend on private wells, wherein the quality of water is largely untested and not known.

There is no data immediately available on the percentage of households that employ septic tank disposal of waste effluent versus a sewerage system. However, most homes in the unincorporated areas and portions of the incorporated areas use a septic tank. Municipal and smaller privately owned wastewater systems are found predominantly within incorporated areas and in many of the “closed-gate” residential developments.

Public water systems serve all the incorporated communities in the Lowcountry and portions of unincorporated areas immediately outside them. BJWSA is the primary service provider for Beaufort County and Jasper County, with the exception being the Town of Ridgeland. Wastewater service is present only in and around the larger, more developed areas. These include the City of Beaufort, Town of Bluffton, Town of Hilton Head Island, portions of unincorporated Beaufort County, City of Walterboro, Town of Brunson, Town of Estill, Town of Gifford, Town of Hampton, Town of Varnville, Town of Yemassee, Town of Hardeeville and the Town of Ridgeland.

The disposal of municipal solid waste is governed by SC Department of Health & Environmental Control (SCDHEC). Localities are required to submit plans every five years regarding their methods of waste disposal and recycling. Beaufort and Jasper Counties currently dispose of their waste at the Hickory Hill landfill in the east central section of Jasper County. Colleton and Hampton Counties each have a county owned landfill and dispose of their waste there.

The amount of pounds of waste generated per person per day varies widely between Beaufort County and the other three counties. Beaufort County’s average is approximately twice that of the other counties, which represents waste from the transient population of a coastal, tourism-oriented county.

Housing. The percentage increase of housing units in the Lowcountry surpassed the rate of population growth in the 1980's and 1990's (See Table XII). In Beaufort County and Jasper County, the number of housing units increased by over 30 percent between 1990 and 2000 and at a time when the population in the counties increased by 39.9 percent and 33.5 percent. Our population was growing faster than the housing stock. Colleton County's and Hampton County's experience was similar in that their population growth was not outrunning their housing stock in 2000.

TABLE XII: Total Number of Housing Units: 1980, 1990 and 2000

	1980	1990	% Change 1980 to 1990	2000	% Change 1990 to 2000
Beaufort	27,309	45,981	68.4	60,509	31.6
Colleton	12,144	14,926	22.9	18,129	21.5
Hampton	6,637	7,058	6.3	8,582	21.6
Jasper	5,292	6,070	14.7	7,928	30.6
Region	51,382	73,257	42.5	95,148	29.9

Source: U. S. Bureau of the Census, Summary Tape File 1A, 1980, 1990, and 2000

New housing construction has slowed overall relative to the percentage change in population. Across the Lowcountry Region as a whole, the population increased faster than the available housing units did. Beaufort County had a net increase of 14,528 housing units, while its population increased by 34,512 persons. Colleton County had a net increase of 3,203 housing units while its population increased by 3,887 persons. Hampton County had a net increase of 1,524 housing units while its population increased by 3,195 persons. Jasper County's increase in housing units was 1,858 while the population increased by 5,191 persons. The need for affordable housing and work force housing is important in the LEDD.

Educational Facilities. There are fifty-five (55) public schools in the region with a total enrollment of over 48,000 students. All counties, but Hampton County have one county-wide school district. Hampton County is divided into two districts, Hampton I and II.

There are twenty (20) private in the region with a total enrollment of over 3400 students. Each county has at least one private school. Beaufort County has six non-parochial schools with K-12 and six parochial schools throughout the county. Colleton, Hampton and Jasper Counties each have one non-parochial school (K-12).

The Lowcountry has a two-year technical college, the Technical College of the Lowcountry (TCL). The main campus is located in the City of Beaufort, with a satellite branches in Southern Beaufort and Jasper County and the Town of Varnville. TCL offers Associate Degree programs in the Arts, Science, Civil Engineering Technology, Computer Technology, Criminal Justice Technology, Early Care and Education, General Business (GB), General Technology, Industrial Technology, Nursing (AND), Office Systems Technology, Legal Assistant/Paralegal, Physical Therapist Assistant, and Radiologic Technology. There are also other diploma programs and numerous other certificate programs tailored to the local economy are offered.

There are two branches of the University of South Carolina in the Lowcountry. The USC-Beaufort, is a four-year college with Associate degree programs in Science and Arts. Also, a Bachelors degree can be obtained in Nursing, Interdisciplinary Studies, Early Childhood

Education and Business Management. USC Beaufort has two campuses – a north campus located in the City of Beaufort and a south campus (New River) located in Southern Beaufort County. The USC-Salkehatchie branch campus, located in the City of Walterboro is a two-year college, which offers Associate Degrees in Arts and Science.

The Academy for Career Excellence provides vocational training for Beaufort and Jasper Counties. The Thunderbolt Career & Technology Center is the primary provider of vocational training in Colleton County.

Medical Facilities. Within the LEDD, five hospitals are available to the public, as well as major trauma centers in Charleston and Savannah. In addition, the US Naval Hospital in Port Royal provides medical service to active and retired military personnel.

Beaufort County has three hospitals, one in the City of Beaufort, the Navy Hospital in Port Royal and one in the Town of Hilton Head Island. Colleton, Hampton and Jasper County each have one hospital.

Cultural and Recreational Opportunities. The southern area of South Carolina was one of the first areas to be explored and settled in North America. In 1521, less than 30 years after Columbus discovered America, Francisco Gordillo landed among the Lowcountry's sea islands and named the area Santa Elena. Since that time, successive generations have left a rich cultural heritage, which lives on in the numerous churches, houses, barns, forts, and plantations.

The City of Beaufort has a 304 acre Historic District that was designated a National Historic Landmark on July 7, 1973. The district offers a museum and other historically significant buildings dating back to 1717. In nearby areas within Beaufort County, there are remnants of structures that date back to the 16th century and intact structures from the 17th and 18th centuries.

The historically significant buildings that can be found in Colleton, Hampton and Jasper Counties are from the 18th and 19th centuries. The City of Walterboro has two historic districts. Many buildings were destroyed during the Civil War.

Four state parks dot the Lowcountry, two in Colleton County, one each in Hampton, and Beaufort Counties. All offer cabins and/or campsites, picnic areas, swimming, fishing and hiking. Beaches are easily accessible at Edisto Beach State Park and Hunting Island State Park.

Nature preserves and wildlife refuges are an integral part of the Lowcountry environment. Ten sites offer nature trails and exhibits for a special look at wildlife management. These site/projects include the ACE Basin, a protected wildlife habitat covering 350,000 acres in a tidewater region of Colleton County. Historic rice fields, managed wetlands, pristine coastal waters, extensive swamps and marshlands, and large blocks of forest land have made the ACE Basin one of the most important wildlife habitat areas in North America. Also included is the Great Swamp Sanctuary an 842 acre tract with nature trails that contains the headwaters of the Ashepoo River.

Fishing, hunting and boating are three of the most avidly-pursued activities in the Lowcountry. Many hunters from out-of-state now lease properties on which to hunt.

The Lowcountry, particularly Hilton Head Island, has a wide selection of outstanding resorts that offer golf, tennis, dining, entertainment and shopping facilities. The area is home to many fine artists and artisans. Art galleries are prevalent, and each year several arts and craft festivals attract many thousands of people. The SC Artisan's Center located in Walterboro is the State's official fine crafts center.

9. Planning and Economic Development Activities

Economic Development Activities. LCOG has played an active role in the four-county region furthering economic development, creating job opportunities for low-to-moderate income persons and decreasing the underemployment rate. LCOG has done so through the administration of community and economic development grants. A cooperative relationship exists with our member governments, county economic development boards and alliances, and the private sector. Additionally, LCOG is working to establish a regional economic development alliance for the four-county region as we are the only area of the state that does not have a regional alliance group to assist with marketing and prospect and product development. LCOG has recently prepared an Economic Diversification Study that identifies the cluster areas our development officials need to focus marketing and recruitment efforts. LCOG provides technical assistance, especially in the areas of grants development and financial packaging. These projects illustrate LCOG's commitment to intergovernmental cooperation as a means of bringing about economic development. (Please see Appendix D for a list of recently awarded grants in the LEDD.)

Planning Activities. LCOG has increased its involvement in area-wide planning issues. The staff is using its professional resources to provide local governments with reports, statistics and information on land use and prepares zoning ordinances, comprehensive plans, and other planning assistance related to economic development. The Planning Department is under contract to SCDOT to be the regional transportation planners for the Lowcountry. As a result, the department has recently completed a Long Range Multimodal Regional Transportation and a Business Plan for a fixed-route bus system (in conjunction with the Lowcountry Regional Transportation Authority) and is currently working with a consultant, SCDOT and regional social service agencies on a Transportation Coordination Plan.

Active planning departments with full-time professional staff in the Lowcountry, are limited to Beaufort County, City of Beaufort, the Town of Bluffton, the Town of Hilton Head Island, the Town of Port Royal, Colleton County, Jasper County, and the City of Hardeeville.

Most of the local governments in the region are currently updating comprehensive plans that were originally developed to meet the 1999 State mandated deadline. For example, Beaufort County is undertaking an extensive comprehensive planning process as is the City of Walterboro and the Town of Ridgeland. Jasper County has just completed its plan and Hampton County is undertaking a joint county-municipal process. In addition, the City of Beaufort, Port Royal, Yemassee, Hardeeville, and the Town of Hampton have just begun their comprehensive plan update processes.

Workforce Development activities. The Lowcountry Council of Governments has a crucial role in design and implementation of workforce development activities as prescribed under the Workforce Investment Act (WIA) of 1998. This is being accomplished through three major

activities that include the administration and supervision of one-stop centers, a youth program and the LEDD's workforce development program.

Currently, the Lowcountry Workforce Investment Area (LWIA) has four comprehensive one-stop centers and two satellite centers established. The one-stops provide three levels of service for job seekers – universal access to information on employment opportunities and training opportunities, intensive programs in which case workers can assist job seekers in becoming self-sufficient, and training opportunities for dislocated workers.

The LWIA also manages a youth program that is designed to serve youth aged 14 to 21 with the goal of preparing them for the workforce. This is accomplished by working to increase graduation rates and credential rates (GED), and to improve the participants' basic skills, occupational skills, and job readiness skills. The LCOG workforce program is an important part of the LEDD's comprehensive economic development strategy to increase investment and create new jobs paying above the state average wage.

IV. ECONOMIC ASSESSMENT

The Lowcountry Region is diverse in terms of land use, economies, natural and cultural resources, worker skills and income. Diversification can be a positive force and is an important economic development goal. The diversity that exists in the Lowcountry Region can offer potential employers a range of workers for jobs ranging from low-skilled service sector jobs to high skilled, high tech jobs.

Social and economic characteristics in the Lowcountry district are sufficiently different that the four counties essentially play on different fields. This presents some challenges in forging a regional partnership in economic development and otherwise. This section offers an understanding of each county's assets and liabilities as it pertains to economic development.

The proximity to Charleston and Savannah and access to the interstate system and rail are potential assets to all the counties of the Lowcountry district. Many people are attracted to these larger markets and some take advantage of the opportunity to explore cultural sites, or experience the abundant scenic beauty or attend the many festivals and events held each year in the region.

Beaufort County. Beaufort County contains the largest amount of economic activity in the LEDD. The county is the most affluent of the four and has the strongest economic base. With 30 miles of Atlantic Ocean coastline and a myriad of sea islands and waterways, Beaufort County has been a natural magnet to tourists and retirees. During the 1960's, Beaufort County was one of the poorest areas in the state, but today Beaufort County has become one of the most prosperous counties, largely because of development in Southern Beaufort County, beginning with Hilton Head Island, but now more so in Bluffton and along the SC 170 Corridor and to a greater extent along the US 278 corridor which connects the area to I95 and serves in part as a border for Beaufort and Jasper counties.

Traditionally, residents in Beaufort County have lived in an agrarian and aquatic society. Today, Beaufort County's economy is influenced by the retail and service sectors which are fueled by tourists, retirees and the military. The tourism industry relies almost exclusively on

disposable income so Beaufort County's economy is usually related to the health of the nation's economy.

Job creation is occurring, but many of the new jobs are in the service sector and are directly or indirectly in response to growth in the tourism and retirement industry. Resort (waiters, maids and cooks) and other tourism-related jobs are lower paying and generally have no fringe benefits, most importantly health insurance. Since tourism is seasonal, workers are not employed in full-time year-round positions. Thus, while the area may have low unemployment rates, the amount of underemployment remains high. Efforts are being made to diversify especially by focusing on attracting technology-based companies and jobs. However with those types of industries there comes a need to train an existing workforce that has traditionally been focused on jobs that are not as technologically advanced.

Housing costs are higher in Beaufort County relative to surrounding counties. Land values are higher which translates into higher assessed values and property taxes. This has placed an additional hardship on those property owners, specifically the life-long residents who are working in low paying or minimum wage jobs. Higher housing costs are forcing many younger workers to live farther from their jobs where costs are more affordable.

Though housing and living costs are higher than surrounding counties, relative to the nation as a whole, Beaufort County would be categorized as affordable. Residential and commercial development properties are readily available at comparatively lower cost than what is found in many urban or highly developed sections of the country. Recently, the Port of Port Royal was closed by the State of South Carolina. This mandated closure is giving Port Royal is the opportunity to benefit from the re-development of the State Port of Port Royal.

One anchor to Beaufort County's economy is the military. A good neighbor and an invaluable asset to the community for over fifty years, the Military Tri-Command, consisting of the Marine Corps Air Station (MCAS), Parris Island Training Depot, and the Beaufort Naval Hospital, presently has a military population of approximately 3,900 and with dependents, totals nearly 10,000. MCAS is a leading employer in the Lowcountry with 4,803 military and civilian employees. Of this total, 3,885 are military personnel; 918 are Department of Defense civilian employees; and, 589 are NAFI employees. The fiscal year 2006 payroll for military personnel and civilian employees totaled about \$204 million. Military contracts and purchases conducted locally are projected to be about \$31 million for FY 2006. There is no single greater influence on the local economy than the military and its loss would be difficult to overcome.²

Beaufort County recognized the need to establish a public-private partnership to continue to foster economic development in the County. This realization resulted in the dissolution of the Beaufort County Economic Development Commission and the birth of the Greater Beaufort-Hilton Head Economic Development Partnership, Inc. which is now the development arm of the County. The Partnership was established in 2002 and has in recent years made a conscious effort to focus on development of investment and jobs outside the tourism industry in order to diversify the County's economy and to make it less reliant on disposable income. Evidence of this effort can be seen in the establishment of the Beaufort Commerce Park and the May River Technology Park.

² Marine Corps Air Station Beaufort, Economic Impact, 2007.

Colleton County. Colleton County is adjacent to Dorchester and Charleston Counties, two of the fastest growing counties in the state. Summerville in Dorchester County and Charleston are popular destinations for the residents of Colleton County. Often Colleton County residents spend their discretionary dollars outside the county, which has placed a strain on local retailers and service providers. Also, roughly a thousand persons, or one in ten of the total working population in Colleton County, work in Charleston or Dorchester Counties.

Colleton County has five exits along Interstate 95, the main north-south corridor along the East Coast. Many businesses have prospered from Interstate travelers. Highway 17, the main corridor of traffic between Charleston and areas to the south, passes through the southern portion of the county. However, a very limited number of commercial establishments are located along Highway 17 within Colleton County. Much of the land along this corridor within the county is not available for development because it is part of the ACE Basin.

The ACE Basin lies between the Ashepoo, Combahee and Edisto Rivers in the southeastern part of Colleton County. The Edisto and Combahee Rivers are the northern and southern county lines. The land is owned by private landowners, public agencies and non-profit organizations to be protected in perpetuity. This 350,000 acre wildlife preserve is destined to become a national treasure and an eco-tourism plus for the county.

Edisto Beach, a small town of summer homes, lies in the lower part of Colleton County and is the only portion of the county that adjoins the Atlantic Ocean. Visitors can camp at the state park and use the marine facilities. Edisto Beach remains a destination for persons seeking a quiet family-oriented place to vacation or live.

The City of Walterboro, the county seat, is the largest incorporated area of the county and the main center of commerce. Walterboro continues to dominate the issues of the county because of its size and political base. Businesses in Walterboro have been successful attracting persons from neighboring Hampton County and outlying areas outside of the LEDD. Many residents at the western end of the County travel to Walterboro for their basic shopping. In addition to a new Wal-Mart Supercenter and an expanded department store (Belks), the city has other attractions that include a cinema, restaurants and medical facilities which include a newly constructed Veterans Administration nursing home that is managed privately. Moreover, Walterboro is gaining a reputation as an antiques shopping destination.

Just outside the City of Walterboro is the Lowcountry Regional Air Park, an excellent park with paved roads and utilities. The park has several moderate to small sized buildings and large sites. Despite the park's age there is room for expansion. Lack of an educated and trained work force has made it difficult to meet the full potential of the industrial park. The Lowcountry Regional Airport is also located adjacent to this industrial park. With three runways in excess of 5,000 feet, the airport is unique for a community of its size because the airport can accommodate all but the largest jet aircraft. The airport's main runway (6,000ft) will have an ILS (instrument landing system) by early 2008.

Colleton County has also developed the Colleton Commerce Center which is a 260 acre park located on one of the northern I95 exits in the County. Recruitment for this park has focused on distribution and logistics and would tie to the existing industrial area through the establishment of a foreign trade zone.

Hampton County. Hampton County has undergone fewer changes than her faster growing neighbors over the past twenty years; the size of its population and civilian labor force remains about the same. Lack of economic growth has resulted in a relatively low cost of living, low median household income and higher unemployment rate. Relative to the state and the nation, the population is poorly educated and lacks a trained labor pool.

The Lowcountry Regional Industrial Park (LRIP) is a 1,200-acre regional industrial park located eight miles off Interstate-95 between Yemassee and Hampton/Varnville. The five counties cooperating in promoting the park were successful in attracting two local business expansions as well as a new business. The fact that the park is regional allows the attraction of moderate-to-large employers by offering the most favorable Targeted Jobs' Tax Credit Program in the State. The park also has the added benefit of being located in a Foreign Trade Zone that provides advantages to companies that conduct foreign trade as part of their business. Property taxes paid by businesses that operate in the park are divided evenly among the five counties. In addition to the LRIP, the Towns of Estill, Hampton, Varnville, and Yemassee each have smaller parks that have varying amounts of available land and/or buildings. Hampton County also is the only county in the LEDD that has partnered with a regional alliance – the Southern Carolina Alliance-to market the county.

Hampton County's primary assets are access to federal and state government grants programs, location on I-95, low cost of living, affordable land, and proximity to two major southeastern cities and their ports. The county's work force, its rural nature (lack of amenities and limited choices of goods and services), and small tax base are deficits to attracting industry and creating jobs in the county. However, Hampton County has proportionately more people employed in the manufacturing sector, which in large part is due to existing industries that have made long term commitments to be in the County.

Jasper County. Historically, Jasper County has difficulty attracting residents and companies to the county despite being adjacent to the City of Savannah. Without access to developable land, little infrastructure and lack of support from the state, Jasper County has been prevented from progressing and enjoying any real growth. However, with two new industrial parks, the attraction of new industries that are housed in these parks, and the eventuality of a large container port in Southern Jasper County on the Savannah River, Jasper County has arrived as a more significant contributor to the region's economy.

Jasper County is adjacent to Chatham County and Savannah and to the Hilton Head/Bluffton area of Beaufort County and is beginning to experience some residential overflow. This is making the need to strengthen the school system, educate and properly train the work force, and upgrade existing infrastructure an immediate need.

For years, timber companies controlled large tracts of land in Jasper County, paying a relatively small amount of property tax per acre. The inability to develop the land and the lack of a strong tax base has severely hampered the county. This is changing due to increasing land values, particularly in southern Jasper County increasing. Land that has been unavailable for development for decades is being released for this purpose by large timber interests and key families.

The county hosts a state welcome center along I-95, and a regional welcome center at Point South, which presents an excellent opportunity for Jasper County, as well as all the counties of the Lowcountry, to promote their communities and events.

The single most promising event that has occurred is the pending development of a deep water port in southern Jasper County. In addition, BJSWA has constructed water and sewer infrastructure in the Cherry Point area as well as a new water treatment plant in Purysburg, which adds to the area's attractiveness for development. SCE&G has also built a new electric plant in anticipation of increased electricity needs. Moreover, Jasper County borders Beaufort County in the rapidly growing southern portion. Spillover development is currently taking place. This development should continue as development restrictions and land costs are lower across the border from Beaufort County.

The 278 connector has opened new opportunities for development from its terminus at I-95 and the junction with SC 170. Beaufort Memorial Hospital, Hilton Head Medical Center and Memorial Medical Center have facilities in that area and the new Coastal Carolina Medical Center operates at Exit 8 (the intersection of I-95 and US 278). In addition, the new Technical College of the Lowcountry Campus has opened along side of various commercial, light industrial and residential uses planned for the land along that corridor.

V. VISION FOR THE REGION

A. Vision Statement

Creating, maintaining and sustaining economic development involves an integrated set of strategies that interfaces with all areas of society, including, job creation, availability of capital, job training, education, child care, affordable housing, environmental protection and social programs of all types. Three main goals or guiding principles are offered to achieve this.

B. Goal and Objectives

Goal I: Establish and follow a shared vision, which fully recognizes the district's strengths and weaknesses while embracing the traditions, character and environment unique to this region.

The acceptance and recognition of a common vision can help to keep a community focused on the direction it wishes to go and forge unity among its people. A comprehensive community assessment can help to identify the traditions, character and environment that must be preserved and which make the community special to those who live there. Since it is impossible to be all things to all people, reasonable choices must be made based on an understanding of existing circumstances. The process should result in a commonly-shared view that can guide local leaders in their governance and instill confidence in the business community.

A common vision of what the region is, what it has to offer, and what it realistically can become can stimulate economic development and enhance people's lives. Since change is inevitable, the decision becomes whether change will shape the community, or will the community shape the change. Economic growth is a fundamental goal for most communities. When a community fails to grow, it gradually deteriorates. However, when growth goes unmanaged or uncontrolled,

the result can be undesired or objectionable. A commonly accepted vision can define the direction that a community desires to go.

Goal II: Decisions and policies made locally should be done in light of what is occurring on a national and global level.

Think globally, act locally is a commonly espoused tenet. However, all too often, the tendency is to only think locally and not recognize that much of the economy interacts directly or indirectly globally. Communities of all sizes everywhere are entwined with and affected by world events.

Modern day communication networks have the ability to compress time and distance to the point that the exchange of verbal and written information and direction can be accomplished instantaneously. A company or its branch operation can be managed from any point in the world. The location of a company's operation can be determined by factors that have more to do with the cost of producing goods or services measured in terms of overall productivity.

Today, travel time and cost between countries is vastly improved. Often, visitors and tourists are foreigners who very naturally evaluate their experience and pass along impressions of the local people and culture. Popular travel destinations can be quickly established or, in some cases, seriously fade. The tourism industry has increasingly catered to the global market.

Most communities are evaluated on the existence of certain fundamentals; an educated and trained work force, an open and tolerant society, low crime, high family values and pride of ownership will attract more development opportunities, foreign or national. Communities that do not display these basic attributes will not compete favorably worldwide for economic opportunities. The decisions that affect or influence change in a community when viewed from a global perspective typically are quite different than those based solely on local concerns and conditions.

Goal III: Institute more direct lines of communication and cooperation among municipalities and their county government and between county governments within the district, for the purpose of realizing an optimum level of service provision and maximum cost efficiency.

Americans, both rural and urban, recognize that while government may be inefficient, the political milieu makes change difficult. However, fiscal pressures on local government continue to rise and with it higher local taxes. Politicians are encountering more criticism and involvement with the issues by citizens of the community. The need to cut waste and increase productivity is causing local governments to consider regional approaches.

For years, opportunities for cost savings and increased efficiencies have been achieved in the private sector through economies of scale. Local governments are finding that they can solve common problems by achieving economies of scale. Opening a dialogue of cooperation for mutual gain and reducing the level and extent of bureaucracy should be practiced.

VI. OBJECTIVES

The following proposed objectives adhere to the foregoing regional goals while more clearly delineating steps that should be taken to achieve economic growth in the region. These objectives are of a duration that is both meaningful and realistic. Though at times objectives should be prioritized, it is suggested that a concerted effort be made to meet all the objectives.

- Continue to organize forums and workshops that will explore programs, strategies and projects that can be pursued for the mutual benefit of the region including the establishment of a regional economic development alliance. The Lowcountry Council of Governments can be instrumental in the organization of the conferences. Discoveries and decisions formed as the result of the conferences would be recorded and included in the Comprehensive Economic Development Strategy.
- Attempt to integrate each County and local government's comprehensive plan to the greatest extent possible. Each county has undergone, or is in the process of updating their comprehensive plans. As the region's economy becomes more interrelated, it is incumbent upon each local government to cooperate with its neighbor. This will encourage and enhance the development of the shared vision.
- Assist in strengthening the local economy through the support of affordable housing efforts in the region. There continues to be a lack of available workforce housing which ultimately weakens the local economy because many of our workers do not live in or near the communities they work in.
- Assist in securing public support for continuing improvement of education in the public schools, strengthening the region's higher learning facilities, and increasing opportunities for the working public to increase their job skills. The level of educational attainment evidenced in a community's labor pool is commonly assessed by a prospective business. Or from another viewpoint, educational attainment, labor skills and job experience determine what jobs a person can qualify. For the region to enjoy economic prosperity, diversity and growth, the region must support the educational enrichment and job skills enhancement of all its citizens.
- Institute programs that acknowledge and reward community involvement and participation. Getting people involved is difficult. Individuals feeling often feel that their voice or contribution is not recognized. Volunteer awards, public awareness campaigns, leadership programs and voter registration drives are some examples of ways to improve community involvement. The more people who take an interest and pride in their community, the greater the likelihood of achieving meaningful and lasting improvements.

VII. ACTION PLAN

A. Program and Project Selection

Beaufort, Colleton, Hampton and Jasper Counties must expand and diversify their industrial and manufacturing sectors to ensure economic prosperity. However, these sectors are subject to the economic dynamics of the world market. Industry, unlike tourism, can be established most anywhere and therefore competition to maintain and attract business is intense.

While the economies of the four counties combined are somewhat diversified, no one county is sufficiently diverse or large enough to withstand a prolonged economic slowdown or a catastrophic loss. For example, if the military base closed in Beaufort or if the region was hit by a major hurricane, the road to a full recovery would be long and difficult because the overall economy is heavily reliant on the retail and service sectors. For the region to realize lasting stability, its diversity must be expanded and in particular the manufacturing sector needs to grow. In an effort to address this need for diversification, Lowcountry Council of Governments has recently completed an Economic Diversification Study that was sponsored in part by the US Department of Defense. While the purpose of the study was to identify clusters that should be pursued to help diversify the region's dependence on the presence of the military bases, it has helped the region focus on economic clusters that are best suited to our strengths. Even with this study and work done in some of the counties in the LEDD to ascertain the perceived acceptability of various industries as classified by standard industry code, it is incumbent upon the counties to develop a marketing plan, which targets specific industries based on existing economic resources. Companies that have expressed interest in the area should continue to be courted assuming that the operation is compatible with the community.

The concept of cluster development is not foreign to South Carolina as evidenced by the State's commitment to the mission and goals of New Carolina, an organization of over 50 business and government organizations committed to the "Porter Strategy" for cluster development – play to your core industry strengths, change the economic environment through business innovation and education, and streamline efforts to this end. For the state as a whole there are six areas of opportunity for cluster development identified by New Carolina that includes: automotive, biopharmaceuticals, chemical products, forest products, production technology, and textiles. For the LEDD in particular, the two primary cluster focuses recommended were "aerospace engines & vehicles" and "motorized and electronic goods" with secondary focuses on: transportation and distribution, textiles, production technology, hospitality and tourism, forest products, building and construction, chemical products, agricultural products and automotive.³

In addition to this, an assessment should be completed which would identify how the four counties depend upon one another. Obviously, the counties are geographically connected and in close proximity to one another and thus resources in one county are accessible to the others. Understanding where and how the counties are interdependent may present new opportunities for cooperation and utilization of combined resources to the good of the region as a whole.

Obvious growth opportunities are present in the retail and service sectors because of the military, the large tourism industry and the rapidly growing retirement population in the LEDD. These opportunities do not require stimulus, but growth management plans need to be put in place to encourage the type of development that will best serve the long-term values of the counties in the region. Additionally, it has been determined through the results of the diversification study that we need to focus our efforts on distribution and logistics clusters as well. With the center of the district is transected by the primary East Coast Interstate artery, the region needs to fully exploit economic opportunities that exist because of the presence of the Interstate system. With the assistance of various federal resources we currently have only four of thirteen interchanges that do not have public water and sewer access.

³ SC Competitiveness Initiative Cluster Activation (June 2005)

Close proximity to the Ports Of Charleston and Savannah, and two free trade zones is an economic advantage. Companies that are dependent on overseas trade could be potential prospects for relocation to the Lowcountry. Existing companies in the Lowcountry should be supported in their interest to expand their market overseas. A local specialist in trading overseas could be retained and readily accessible to existing and prospective businesses.

Government grants and loan programs are designed to alleviate hardships found in the more impoverished areas of the United States. High levels of poverty and underemployment have been identified in the Lowcountry. Consequently, projects that put additional low to moderate-income people to work may be eligible for some assistance.

More programs should be established that will provide the essential elements to a business' success – access to capital and qualified and professional business expertise. Other programs could be established that are tailored to the local economy.

Virtually every rural area is interested in expanding their manufacturing sector and all are offering comparable financial incentives to prospective businesses. The most recent studies done on business recruitment strongly suggests that companies are making site selections based on several factors above and beyond financial incentives. The primary factors are:

- The availability of an educated and trained work force in that particular business' field.
- Infrastructure (water, sewer and optic fiber communications).
- Moderate to low cost of living (measured in terms of housing, taxes, health care and transportation).
- Essential and discretionary social amenities (quality health care, recreational and cultural amenities).
- An excellent public school system.

From a national basis, the data indicates that LEDD measures low in these areas. In today's industrial recruitment market, the suburban areas of major metropolitan areas are competing most favorably for new and expanding businesses.

B. Course of Action

Based on the plan's goals and objectives, the LEDD Board of Directors has formulated a list of projects for the future to best implement the Comprehensive Economic Development Strategy. As programs and projects are implemented and depending on the availability of federal and state assistance, the Board will adjust its list of activities and projects. Economic development and industrial recruitment of businesses paying wage rates at or above the state average remains one of the region's highest priorities.

- 1) The LEDD will continue to work closely with Jasper County and other local and regional organizations to support the development of a port (Jasper Ocean Terminal) in the southern portion of the County. The County continues to have increased prospect activity as a result of the plans in place for the development of the port and the LEDD continues to provide development data for those prospects. The River Port project in Hardeeville is particularly important and the warehousing/distribution/logistics business sector remains a focus for the LEDD.

- 2) The SC Hwy. 68 Corridor at I95 Exit 38 in Hampton between Yemassee and Varnville remains a focus for economic development efforts within the LEDD. The LEDD is working closely with the occupants in the Lowcountry Regional Industrial Park (LRIP) to overcome obstacles faced there. Through our Workforce Development Program actions are being taken to strengthen the area's labor force. Hampton County now has full ownership of the LRIP, and is continuing to market the park as a full member of the Southern Carolina Alliance.
- 3) Hampton County along with the Southern Carolina Alliance and other partners are developing the Southern Carolina Commerce Park along the SC Hwy. 68 Corridor with a megasite for the region that has all infrastructure – interstate access, rail access, water and sewer. Currently, there is a spec building being constructed in the site as well as approvals confirmed to establish a rail crossing that will create an intersection between this park and the LRIP.
- 4) Support of Hampton County and the Town of Yemassee's efforts to expand the Town's WWTF to a discharge limit of 1.5MGD to support the Lowcountry Regional Industrial Park, the Southern Carolina Commerce Park and the Angel tract which represents the County's industrial corridor. A study is underway that should support the NEPA permitting of the effort.
- 5) Support of Hampton County municipalities in their efforts to regionalize their public water and sewer systems in Hampton County. Currently we are working on establishing a legal entity for the group.
- 6) To better meet the needs of employers and increase job skills, LCOG will work to secure funding to establish technical training centers in all LEDD counties by partnering with Technical College of the Lowcountry and the Lowcountry Workforce Investment Area.
- 7) The LEDD will support the development of an inland port to connect the Jasper Ocean Terminal by rail to the interstate highway system, particularly I-95.
- 8) The LEDD has completed a Planning Study for Logistics/Distribution Center Clusters to determine how the region can better position itself to market these types of projects.
- 9) The LEDD supports the development of a regional economic development alliance to assist the counties of the LEDD in marketing and developing investment in the region. The LEDD will also support individual counties that choose to join alliances that include counties outside of the LEDD.
- 10) The LEDD recognizes the importance of having available financing & the need to reorganize the Title IX Revolving Loan Fund.
- 11) Work with Hampton County officials to expand biodiesel and alternative fuels development at Carolina Soya in Estill.
- 12) Lowcountry COG is in its second three-year term as a regional HOME consortium to support affordable housing efforts for residents of the Lowcountry. All original

participants renewed for the new three year period. Twenty-four of twenty-five local governments are members.

- 13) Assist the City of Walterboro with securing funding for the construction of an interpretive center at the Great Swamp Sanctuary – a nature preserve dedicated to providing educational and nature-based tourism, job and investment opportunities in the LEDD.
- 14) Continue with the marketing of the Cypress Ridge Business & Industrial Park in Ridgeland and the construction of additional water, sewer and road infrastructure within the park to access other parcels for development. This goal will result in additional jobs in the park that have a higher wage rate and provide benefits to employees.
- 15) Encourage and assist with industrial and commercial development in the southern Jasper County/Hardeeville area that will result in the creation of new jobs.
- 16) Secure funding for construction of a new WWTF in Ridgeland to serve new businesses locating in the Town and the publicly-owned parks the Town serves. A new WWTF is needed to generate new jobs in the Cypress Ridge Business & Industrial Park and in the I-95 corridor of northern Jasper County.
- 17) Continue work on the development of the four I-95 corridor interchanges within the LEDD that have no infrastructure. Encourage local governments to enact development regulations in these areas that support warehousing and distribution. This includes the development of Exit3 along I95 to support the port development along with needed improvements to the US Hwy 17 corridor.
- 18) Support the efforts of local governments and regional non-profits to establish small business loan pools that meet the needs of local business. This could include micro lending and/or public/private partnership initiatives to grow businesses locally.
- 19) Work with the Lowcountry Small Business Hub to develop and expand programming to support new and existing small business enterprises in the LEDD.
- 20) Work with Colleton County officials to continue to develop/promote the Colleton Commerce Park.
- 21) Also as a result of the recent economic downturns, there are a number of industrial buildings in the LEDD that are currently vacant as a result of closures. The LEDD will work with local and state officials to market those buildings for adaptive reuse for industries that are expanding.
- 22) Give high priority to transportation projects within the LEDD that support economic growth within the region, as part of the State Transportation Improvement Plan and support transportation alternatives that support commuting options. This includes the widening of SC Hwy 68 from the interstate to the entrances of the Lowcountry Regional Industrial Park and the Southern Carolina Commerce Park.

- 23) Continue to develop and expand the SC Works Center System to meet the needs of employers and workers in the LEDD.
- 24) Continue to work with the county economic development organizations to implement recommendations of the Regional Economic Diversification Study, specifically a distribution and logistics center cluster, film studio development, and healthcare cluster.
- 25) Work with Colleton County officials to develop business sites directly on and/or accessible to the Lowcountry Regional Airport in Walterboro.
- 26) Work with Town of Port Royal and Beaufort County officials to support efforts to redevelop the property that was once the Port of Port Royal.
- 27) Work with the county economic development organizations to support businesses developing value-added products to build upon the agriculture and wood product businesses.
- 28) Work with local governments and business to promote working waterfront enterprises including areas like the seafood industry and the charter industry.
- 29) Work with the Town of Bluffton to expand the May River Technology Park.
- 30) Work with the Town of Hilton Head Island on redevelopment projects that create jobs and investment.
- 31) Work with communities that want to expand the tourism industry in their area to include working with businesses involved in environmental tourism, heritage tourism and activities that support the Preserve America initiatives.

Though a directed program is preferred over random activities, the LCOG Board supports all economic development efforts that provide job opportunities increases the level of personal income and working wage rates and expand the tax base of communities. In response to LMI job commitments made by employers, water and sewer projects are developed. Few communities can proactively undertake water and sewer service projects thinking that if they build it, they will come. The needs are out there but the funding is not. Every opportunity to expand or improve a water and sewer system will be pursued with CDBG or EDA funds if possible.

The Lowcountry Council of Governments will continue to offer planning and technical assistance to local governments. Efforts will be made to assist in areas other than economic development including environmental protection, housing, aging, transportation, community development, coastal zone management, solid waste management and social programs. A coordinated effort at the regional level can be facilitated by LCOG, which has the expertise and knowledge to access available federal and state resources.

VIII. EVALUATION

Successfully implementing a Comprehensive Economic Development Strategy requires all sectors of the community: government, education, private enterprise, social services, health, trade and professional organizations, chambers and economic development boards engaged in a

shared vision of what the community can and should become. It is less difficult to undertake projects and programs when there is a consensus of action and thought. Piecemeal implementation of projects and programs invites unproductive endeavors. Coordination of activities can amplify all undertakings and ensure immediate and sustainable economic progress. An evaluation system can be established which will keep the region informed of its rate of progress.

An established successful way to track the progress of a community or region is through a quality of life survey. The survey can be designed to provide information and insight into the many areas of the community which have been targeted for improvement. The survey would measure criteria typically not found researching available data and statistics. Improvements in the external environments of the region are measured by periodically surveying the following areas: the economy, public safety, health, education, natural environment, mobility, government/politics, social environment and culture/recreation. These surveys are conducted annually and comparisons over time could be made to measure progress. In essence, this would be a report card for those in the community and those considering relocation to the community.

Several benchmarks can be used to determine the effectiveness of the LEDD in addressing area distress. Six important areas measure how successful the LEDD is in generating job opportunities and creating wealth in the region. Those benchmarks are reviewing progress in reducing the unemployment rate of the counties, increasing per capita income of the residents of the region, increasing the average weekly wage rate of the counties, increasing the skills of the workforce, comparing the annual GPRA Data collected against the local developers' performance goals for their communities.

With regard to unemployment, the goal is for all member counties' unemployment rates to be below the State average. We saw some improvement last year in this area, but Hampton County continues to be of a particular concern.

With regard to per capita income, historically it has grown at an annual rate ranging from 0.5% to 4% in our member counties, based on information from the Bureau of Economic Analysis from 1999 to 2003. We would like to see these percentages increase consistently so that all LEDD counties have per capita income figures at or above the per capita income for all non-metropolitan areas of South Carolina (\$23,345, based on 2003 statistics of the BEA).

In the area of average weekly wage rates in the LEDD, the rates on a county basis have consistently lagged behind the State as a whole. A primary goal of the LEDD remains to see average weekly wage rates increase to the State average. The gap between the County wages and the State average is continuing to be narrowed particularly in Beaufort and Jasper Counties where some sectors are actually above the State average but the region as a whole continues to lag behind.

In the area of increasing workforce skills, the LEDD has been successful in providing services to give people opportunities to increase their skill levels to be successful in the work environment. A primary goal of workforce development in the LEDD remains to provide services to all.

In the past year looking at the GPRA Data, our jobs and investment numbers were all considerably lower than the numbers generated previously. The LEDD saw the creation or

retention of approximately 98 jobs in the area, public sector investment generated in the amount of \$73,500 and private sector investment generated in the amount of \$12,589,842.

APPENDIX

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APPENDIX A

LOWCOUNTRY COUNCIL OF GOVERNMENTS BOARD OF DIRECTORS

<u>Name</u>	<u>Occupation</u>	<u>Appointing Jurisdiction</u>
BEAUFORT COUNTY		
Gerald Dawson		Beaufort County Council
Willie Ferguson		Town of Hilton Head Council
Brian Flewelling		Beaufort County Council
Herbert Glaze (Vice Chair)	High School Assistant Principal	Beaufort County Council
Mary Beth Heyward	Medical Clinic Services Director	Port Royal Town Council
William McBride (Exec.Com)	Retired Educator	Beaufort County Council
Judge Joseph McDomick	Retired Magistrate	Beaufort County Council
James M. Outlaw	Retired Educator	Beaufort County Council
Jerry Stewart		Beaufort County Council
Lisa B. Sulka		Bluffton Town Council
George Williams	Real Estate Investor	Town of Hilton Head Council
COLLETON COUNTY		
Esther S. Black	Retired Educator	Colleton County Council
Dr. Joe Flowers (Exec. Comm.)	Primary Care Physician	Colleton County Council
Larry Hutto		Edisto Beach Town Council
Evon Robinson	Minister	Colleton County Council
Gene Whetsell	Registered Land Surveyor	Colleton County Council
Bill Young (Chair)	Real Estate Sales Agent	City of Walterboro Council

HAMPTON COUNTY

Frankie Bennett	Businessman	Town of Estill Council
Charles Boyles, Jr. (Exec. Comm.)	Businessman	Town of Hampton Council
Nat Schaffer	Real Estate Broker	Town of Varnville Council
Lloyd Griffith (Treasurer)	Retired	Hampton County Council
J. L. Goodwin		Town of Yemassee Council
Charles H. Phillips	Retired School Superintendent	Hampton County Council
James (Pete) Hagood	Organ. Labor –Union Rep.	Hampton County Council

JASPER COUNTY

Sherry Carroll		Hardeeville City Council
Gary Hodges (Exec. Comm.)		Ridgeland Town Council
Leroy Blackshear		Jasper County Council
Henry C. Lawton, Sr.	Retired Educator	Jasper County Council
Gwen Johnson Smith (Secretary)	Retired Educator	Jasper County Council

APPENDIX B

LOWCOUNTRY INDUSTRIAL AND MANUFACTURING COMPANIES

Company Name	Product	# Employees
Hampton County		
American Machining & Mfg. Co.	Machining Tool & Die making	7
Carolina Pel Pro	Kitty Litter	14
Carolina Soya, LLC	Grains, Soybeans, Soybean Products	35
Coastal Technologies	Mist eliminators	11
Composite Materials Technology	Fiberglass flag & Lighting poles	48
Cummings Ice Plant	Ice	12
Diversified Metal Products.	Decorative Ironwork & Custom welding fabrications	2
Dixie Poly Drum Corp.	Plastic drums and Tanks, Custom molding	30
Elliot Sawmilling Co.	Lumber	200
Falcon Industries	Rain Wear, Industrial Protective Clothing	81
Guess Farm Equipment	John Deer Dealer, Irrigation systems	14
Hoo Cum Mechanical Contractors	Steel Fabrication	4
LeCreuset of America	Distribution Ctr. Cast Iron cookware	90
McCrary's Inc.	Proto-type steel millwright	8
Mead Westvaco Corp.	Wood Chips	11
Megco Services	Cotton gin & cypress mulch	20
Nevmar	High pressure laminate	400
Oakwood Products, Inc.	Manufacture chemicals for research	18
Precision Machined Components	Precision machined components	7
Southern Millwright & Supply	Welding, repairs fabrication	10
Spencer Industries	Vacuum & pressure form plastic	30
WeeBee Enterprise	Fiberglass poles	8
Wiggins Concrete Co.	Ready Mixed Concrete	9
Colleton County		
Allengheny Strip Division	Metal silting	10
American Body Building Products	Sports drink bottler	30
American Peat & Organic Corp.	Potting Soil	10
Balchem Corp.	Water Treatment chemical co.	18
BMK Warehouse Distributors	Tire lead weights	6
Canadys Steam Plant	Electrical Generation	95
Carolina Textile Recycling	Recycles used clothing	35
Carolina Visuals	Manufactures flags and	140

Coastal Electric Cooperative	banners	40
Coastal Lumber Co.	Communications, utility ,gas	60
Colleton Medical Center	Lumber mill	535
Colleton Software Associates	Healthcare provider	15
Colleton Tile & Concrete	Software Materials	15
	Ready mix concrete & Septic tanks	141
Dayco	Automotive Belts	12
East Coast Pole and Timber	Debarks, grades & sorts timber poles	60
	Floral forms	5
Floralife Inc.	Sand Mining	32
Foster-Dixiana	Wooden Pallets	30
IFCO Systems	Cypress mulch	25
Interstate Wood Products	Industrial labels	80
ITW Trimark	Fundraising products	10
Jaxco Industries	Seals, gasket sets, dye cutting, custom packaging	6
McPherson Manufacturing	Suppliers of industrial gases	9
	Wood chips	10
National Welders Supply	Plastic Bottles	42
North Carolina Fiber Group	Communication, telecom services	9
Novapak Corp.	Paper goods	18
Palmetto Rural Telephone Cooperative	Commercial Printing	22
	Wooden pallets	100
	Metal Buildings	48
Paper Converters	Dist. Golf course irrigation sys.	100
WNI Print Division - Press Printing	Utility-Electricity & Gas supplier	70
Palex Inc.	Metal Slitting	7
Rockford Manufacturing Ltd.	Natural source raw materials for food industry	5
Simmons Irrigation Supply	Glass Products	120
	Wood chips, crossties & pallets	125
SCE&G	Hardwood veneer, rotary oak	53
Teledyne-Rodney Metals	Lumber chips, sawdust & bark	15
Triarco Industries	Planing mill, timber sizing & fencing	
Trident Window Systems		
Upchurch Inc.		
Walterboro Veneer Co.		
Warren & Griffin Inc.		
West Ashley Lumber Co.		
Jasper County		
Apac- Southeast, Inc.	Asphalt Production	25
Athena Corporation	Cultured Marble	30
Atlántico Consolidated Manufacturing	Fabricated Components and Vehicles	54
Building Specialties of Carolina Inc.	Garage Doors, Fireplaces, Grills.	14
Bulk Bag Express	Remanufacture of bulk bags	7

BURCO	Railroad crossing signs	6
Caraustar	Bale, Shred and Export Waste	15
Carolina Asphalt Paving Inc.	Asphalt paving & road construction	37
Carolina Castings Corp.	Castings, iron, steel, ductile	9
Carolina Coach	Horse Trailer Interiors	10
Carolina Slings, Inc.	Web Slings	4
Carolina Timber	Logging	12
Cleland Site Prep Inc.	Site Preparation, Clearing, Demolition	180
Conex Concrete	Ready mix concrete, pumping	15
Creekside Farms	Turf grass	7
Crosby Logging and Timber	Logging	7
Crowley Innovations	Toilet ventilation sys.	5
D.M.W. Marble & Terrazzo ,INC.	Marble, Granite, Oysterstone, Vero stone	7
Distinctive Granite and Marble	Granite and marble Countertops	5
Foster Dixiana Corp.	Industrial sands	2
Fred Gretsch Enterprises	Banjoes, drums, guitars	8
Haven Homes Southeast ,Inc.	Modular Homes	75
High Cotton Inc.	Manufacture Gift Products	10
Hilton Head Cookie Company LTD.	Dough Refrigerated	4
Hilton Head Laboratories	Insect repellent	6
Hilton head Outdoor Products	Canvas bags and totes	8
John White Logging	Logging	19
Lowcountry Block	Paver Concrete Bricks	8
Lowcountry Concrete	Ready mix concrete, block, precast concrete septic tanks	5
Lowcountry Louver Manufacturing	Gable- End Vents, Foundation Vents	2
Malphrus Construction	Heavy Construction, Commercial Construction	558
MC Industries, LLC	Residential and Commercial steel framing components	
Metal Finishes ,Inc	Powder Coating	7
Nimmer Turf & Tree Farm	Turf grass	70
Ocean Catamarans	Catamarans	5
Ohio Gratings, Inc.	Steel and Aluminum Grating	6
Oliver Kitchens and Baths`	Cabinetry	15
Prestige Farms ,Inc.	Process, Sales and Delivery of Poultry	7
Quality Signs & Graphics	Banners, signs, billboards, vinyl lettering	2
REA Construction	Hot mix asphalt for paving	4
Ready Mixed Concrete	Ready mixed concrete	15
Renaissance Fine Chocolates	Gourmet Chocolates	4
Rinker Materials	Sand	6

Roberts Trailers	Trailers	4
Roll-A-Way Storm & Security Shutters	Impact windows ,doors, roll down screens	28
SCE&G Jasper Generating Station	Electricity	40
Sandhill Logging	Logging	11
Shaw Manufacturing's Wrought Iron Works	Steel and Alum rails	35
Smith Logging, Inc.	Logging	15
Sterling Architectural Millwork	Custom Cabinets and Doors	16
The Sun Times	Newspapers, advertising	4
Timber Products, Inc.	Logging	11
Vulcan Materials	Stone, Aggregates	4
Walsh Fabrication	Solid Surface Countertops and Granite stone	67
Wood Tech Cabinets	Commercial & residential custom cabinets, aircraft cabinets	4

Beaufort County

Alper Dispersions	Water based color	22
Athena Corporation	Bathtubs, whirlpools and countertops	30
Atlantic Littleneck Clam Farms	Littleneck Clams	93
BB Enterprises Inc.	Wood Cabinets and Fixtures	2
Beaufort Concrete	Concrete	11
Beaufort Gazette	Newspapers	82
Beaufort Molded Products	Plastic injection molding	30
Beaufort Nail Co.	Threaded and specialty nails	30
Bluffton Oyster Co.	Oyster Dist.	35
Broad River Apparel	Lady's T-shirts	38
Brown's Fabrication & Welding	Guard rails, general welding	2
The Chocolate Tree	Candy	8
Coca-Cola Bottling Co.	Soft drink distributor	41
Coastal Concrete	Ready mix concrete	18
Curry Copy Center	Printing	9
Environments	Children's' furniture, toys	85
Ebbtide & Associates	Residential lighting fixtures, home furnishings	24
Golfer's Guide, Inc.	Periodical, publishing, printing	5
Graphics Corp	Signs & displays	6
Greenwave Biotech	Bioremediation	20
Guidera Publishing Corp.	Newsletters, books	14
Thomas J. Hampson Fine Woodworking	Fine wood furniture, Cabinets	3
Harris Pillow Supply	Pillow ticking, renovating	12
Hilton Head Ice Cream	Ice Cream, frozen deserts	15
Hilton Head Signs	Wooden Signs, banners	4
The Island Packet	Newspapers	63
The Island Printer	Commercial Printing	2
Jeter Construction Co.	Asphalt Mix	45
Kigre, Inc.	Laser Components	49

Labs, Inc	Animal Breeding	60
Lobeco Products	Chemicals	85
Lowcountry Guild	Doormats, coaster, notebooks, and placemats	25
Lowcountry Mfg.	Children's clothing	175
Lowen Co.	Real estate signs	8
Minuteman Press	Commercial Printing	6
Minster Machine	Ancillary equipment for stamping, forming presses, material handling equipment, automation equipment	75
Mister Label	Pressure Sensitive labels	18
Optimum Resource	Educational Software	40
Parker Abex	Aircraft flight, engine controls, components	230
Perry Printing	Commercial Printing	15
Pixie Products	Decorative waste baskets, canes, notebook covers	7
Procyon	tapping machines	2
Recon Mfg.	Cabinetry	4
Resort Svcs.	Processing hospital linens, mfg. Linens	240
Signsystems Southeast	Signs & displays	4
Teardrop Putter	Putter production and assembly	10
Therafirm Support Hosiery	Support Hosiery	9
2 Stroke International	Small engines	50
US Telecom Holdings	Product Billing & Customer Care Software	65
Vanguard Plastics	Polybutylene pipe, fittings	50
Visions Productions	Promotional Videos	6
Wee Bee Enterprises	Pultrusions	6
Williams Woodworking	Custom Cabinets, fixtures & furniture	7

APPENDIX C

TABLE II: Municipal Governments

	Form of Government	Number of Council Members	Term	Election method
BEAUFORT COUNTY				
<i>City of Beaufort</i>	Council Manager	5	4	Non-partisan at large
<i>Town of Port Royal</i>	Council Manager	5	4	Non-partisan at large
<i>Town of Bluffton</i>	Council Manager	5	4	Non-partisan at large
<i>Town of Hilton Head</i>	Council Manager	7	4	Non-partisan one member from each ward
COLLETON COUNTY				
<i>Town of Cottageville</i>	Mayor Council	5	4	Non-partisan at large
<i>Town of Edisto Beach</i>	Mayor Council	4	4	Non-partisan at large
<i>Town of Lodge</i>	Mayor Council	5	2	Non-partisan at large
<i>Town of Smoaks</i>	Mayor Council	5	2	Non-partisan at large
<i>City of Walterboro</i>	Council Manager	7	4	Partisan at-large
<i>Town of Williams</i>	Mayor Council	5	2	Non-partisan at large
HAMPTON COUNTY				
<i>Town of Brunson</i>	Mayor Council	5	4	Non-partisan at large
<i>Town of Estill</i>	Council	5	4	Non-partisan at large
<i>Town of Furman</i>	Council	5	2	Non-partisan at large
<i>Town of Gifford</i>	Mayor Council	5	4	Non-partisan at large
<i>Town of Hampton</i>	Mayor Council	5	4	Non-partisan at large
<i>Town of Luray</i>	Mayor Council	5	4	Non-partisan at large
<i>Town of Scotia</i>	Mayor Council	4	4	Non-partisan at large
<i>Town of Varnville</i>	Mayor Council	7	4	Non-partisan at large
<i>Town of Yemassee</i>	Mayor Council	4	4	Non-partisan at large
JASPER COUNTY				
<i>Town of Hardeeville</i>	Council Manager	5	4	Non-partisan at large
<i>Town of Ridgeland</i>	Council	5	4	Non-partisan at large

APPENDIX D

COMMUNITY AND ECONOMIC DEVELOPMENT PROJECTS					
COUNTY	APPLICANT AGENCY	PROJECT DESCRIPTION	SOURCE	FISCAL YEAR	TOTAL COST
Beaufort	Beaufort County	Assistance to a Non-profit	EDA	2006	\$544,700
Beaufort	Beaufort County	Assistance to a Non-profit	CDBG	2006	\$270,000
Beaufort	Town of Bluffton	BIS Sewer Extension (Phase 1)	CDBG	2008	\$500,000
Beaufort	Beaufort County	Energy Efficiencies	CDBG	2008	\$494,989
Beaufort	Town of Bluffton	BIS Sewer Extension (Phase 2)	CDBG	2009	\$500,000
Beaufort	Beaufort County	Dale II Water Extension Project	CDBG	2009	\$448,380
Beaufort	Beaufort County	St. Helena Library	CDBG	2009	\$1,500,000
Beaufort	City of Beaufort	Bladen Streetscape	CDBG	2009	\$800,000
Beaufort	Town of Port Royal	Ft Frederick Sewer Extension	CDBG	2010	\$321,290
Beaufort	City of Beaufort	NWQ Village Renaissance	CDBG	2010	\$500,000
Beaufort	Town of Bluffton	BIS Village Renaissance	CDBG	2010	\$500,000
Beaufort	Beaufort County	Burton Water Extension	CDBG	2011	\$422,500
Colleton	City of Walterboro	By-Pass Extension	CDBG	2006	\$500,000
Colleton	Colleton County	Job Training Center	CDBG	2007	\$1,702,500
Colleton	Colleton County	Job Training Center	EDA	2008	\$1,250,000
Colleton	City of Walterboro	Pine Needle PS Improvements	CDBG	2008	\$243,250
Colleton	City of Walterboro	Lincoln Water	CDBG	2009	\$206,000
Colleton	City of Walterboro	Francis St. Water Looping	CDBG	2010	\$469,925
Colleton	City of Walterboro	Lemacks Street Study	CDBG	2010	\$25,000
Colleton	City of Walterboro	Doodle Hill Public Safety	CDBG	2010	\$500,000
Colleton	City of Walterboro	Jackson Street Pump Station	CDBG	2011	\$340,900
Hampton	Town of Estill	Rail Improvements	CDBG	2006	\$690,000
Hampton	Town of Varnville	Pepper Street Pump Station	CDBG	2006	\$314,590
Hampton	Town of Hampton	Elm Street Pump Station	CDBG	2006	\$133,170
Hampton	Town of Brunson	Housing Rehab	CDBG	2006	\$283,695
Hampton	Town of Estill	Multipurpose Center	CDBG	2006	\$295,290
Hampton	Town of Estill	Sewer Improvements	CDBG	2007	\$1,000,000
Hampton	Town of Yemassee	PS Upgrades	CDBG	2008	\$499,500
Hampton	Hampton County	Jobs Training Center Equipment	CDBG	2008	\$265,741
Hampton	Hampton County	Jobs Training Center Renovation	EDA	2008	\$598,000
Hampton	Town of Gifford	Regional Water/Sewer Study	CDBG	2008	\$70,000
Hampton	Town of Hampton	Water Looping	CDBG	2009	\$308,220
Hampton	Town of Varnville	Water Looping	CDBG	2010	\$500,000
Hampton	Town of Yemassee	Sewer Line Improvements	CDBG	2010	\$500,000
Hampton	Hampton County	Estill Library	CDBG	2010	\$357,572
Hampton	Town of Estill	Ruth Street Pump Station	CDBG	2011	\$500,000
Hampton	Town of Varnville	Mill Pond Pump Station	CDBG	2011	\$190,297
Jasper	Town of Ridgeland	Infrastructure- Housing	CDBG	2006	\$352,000
Jasper	Jasper County	Infrastructure -- Housing	CDBG	2007	\$223,559
Jasper	Town of Ridgeland	Sewer Extension	EPA	2007	\$192,400
Jasper	Town of Ridgeland	Well Upgrade	CDBG	2009	\$500,000
Jasper	Jasper County	Sewer Extension	CDBG	2010	\$500,000
Jasper	Town of Ridgeland	Water Tank Improvements	CDBG	2011	\$429,500

APPENDIX E

TABLE XV: Employees, Payroll, and Establishments by Industry: 2000 and 2005

	Number of employees for week of March 12		Annual Payroll (\$1,000)		Total number of establishments	
	2000	2005 (% Gain)	2000	2005	2000	2005
South Carolina						
Agricultural Services, forestry and fishing	5,244	4,971 (-5%)	139,473	174,973	646	608
Construction	116,696	108,276 (-7%)	3,335,647	3,594,290	11,440	12,285
Manufacturing	334,651	271,326 (-19%)	11,449,269	10,958,564	4,431	4,289
Transportation, Warehousing and Utilities	50,736	62,425 (23%)	1,789,371	8,357,559	2,629	2,990
Wholesale trade	65,255	63,718 (-2%)	2,353,408	2,822,820	5,091	4,795
Retail Trade	223,955	220,737 (-1%)	4,082,890	4,511,411	16,262	18,590
Finance, insurance and real estate	81,557	92,795 (14%)	2,795,333	3,658,602	9,721	11,745
Services	627,158	678,787 (8%)	13,900,381	17,809,693	39,841	44,374
Total	1,601,532	1,584,914 (-1%)	43,362,158	49,450,267	97,146	103,416
Beaufort County						
Agricultural Services, forestry and fishing	99	132 (33%)	-00-	1,566,712	8	11
Construction	5,811	5,832 (0%)	174,106	218,175	690	819
Manufacturing	1,239	815 (-52%)	37,200	24,700	96	88
Transportation, Warehousing and Utilities	1,053	1,175 (12%)	37,815	55,034	68	91
Wholesale trade	795	761 (-4%)	24,923	34,911	124	138
Retail Trade	9,210	9,219 (0%)	182,715	209,772	824	803
Finance, insurance and real estate	3,227	3,928 (22%)	106,879	163,327	490	657
Services	22,453	26,900	520,599	729,585	1,728	2,074

		(20%)				
Total	47,171	52,805 (12%)	1,183,171	1,566,712	4,287	4,895
Colleton County						
Agricultural Services, forestry and fishing	143	187 (31%)	3,592	5,278	26	33
Construction	631	656 (4%)	11,671	13,506	110	97
Manufacturing	1,769	1,891 (7%)	44,660	50,757	31	31
Transportation, Warehousing and Utilities	356	75 (-80%)	2,315	1,566	23	27
	Number of employees for week of March 12		Annual Payroll (\$1,000)		Total number of establishments	
	2000	2005 (% Gain)	2000	2005	2000	2005
Colleton County Cont.						
Wholesale trade	529	373 (-29%)	17,872	13,220	35	27
Retail Trade	1,840	1,760 (-4%)	26,556	31,467	183	168
Finance, insurance and real estate	558	516 (-8%)	15,299	17,651	92	105
Services	2,794	3,292 (18%)	49,349	64,708	281	300
Total	8,716	9,079 (4%)	183,515	211,633	529	723
Hampton County						
Agricultural Services, forestry and fishing	193	167 (-13%)	5,259	6,136	20	20
Construction	213	242 (14%)	4,534	6,165	48	45
Manufacturing	1,394	923 (-34%)	46,628	37,867	21	15
Transportation, Warehousing and Utilities	241	167 (-31%)	4,563	6,402	19	15
Wholesale trade	225	0 (-100%)	5,634	-00-	14	6
Retail Trade	983	935 (-5%)	13,319	15,156	120	120
Finance, insurance and real estate	160	229 (43%)	4,430	5,596	34	33

Services	1,369	1,322 (-3%)	19,784	29,884	152	168
Total	4,740	4,217 (-11%)	109,692	117,634	443	436
Jasper County						
Agricultural Services, forestry and fishing	102	-00- (-100%)	2,074	-00-	11	-00-
Construction	672	885 (32%)	13,762	27,647	99	108
Manufacturing	249	513 (106%)	-00-	3,717	7	21
Transportation, Warehou sing and Utilities	198	127 (-36%)	-00-	2,514	9	22
Wholesale trade	184	243 (32%)	7,815	8,316	12	17
Retail Trade	669	1,036 (55%)	15,092	21,345	95	88
Finance, insurance and real estate	102	126 (24%)	1,989	3,735	29	35
Services	1,309	2,088 (60%)	14,900	47,182	150	188
Total	3,462	5,284 (53%)	68,435	139,209	435	498

Source: U. S. Bureau of the Census, County Business Patterns, South Carolina, CBP-80-42 and CBP-90-42.