



APPENDIX B: MARKET DEMOGRAPHICS

B MARKET DEMOGRAPHICS



B.1 QUALITY OF LIFE ASSESSMENT

The City of Beaufort describes itself as a city of choice, and the county seat of Beaufort County in the Lowcountry of South Carolina. It is located well off the primary Interstates and Highways in the coastal Lowcountry. It is most notably a coastal city with its waterways providing its primary identity. Beaufort is currently best known for its southern charm, rich history, arts scene and picturesque quality of life — as identified by its downtown and waterfront park.

Beaufort has enjoyed a strong tourism industry that is supported by military visitors, local arts and culture. There is a strong artist community here, conferred by the Beaufort County Arts Council, making it a top artist destination. Tourism also includes the natural beauty of its intra-coastal waterways and the centerpiece of a string of barrier islands. Efforts by the Chamber of Commerce include studies to expand conferences, meetings and facilities. Nationally, trends in travel and tourism have shown a decline, including a significant drop in roadway travel in August 2008, according to the Federal Highway Administration. This trend bears watching carefully, particularly in the short term, largely due to the changing global economy and shifts in gas and energy use.

Much of Beaufort's economy is dependent upon its area military installations. The US Naval Reserve & Marine Corps Air Station, Parris Island, and the Laurel Bay Area (highlighted in yellow on the map). These bases not only drive local employment but also tourism with frequent military graduations. Data from the Marine Corps Air Station (MCAS) suggests that the MCAS facilities have a direct economic impact of \$509.2 million dollars. Results from the Base Realignment And Closure Act (BRAC) indicate no significant increase in base population in the coming years, but rather reallocation of personnel to accommodate new equipment and technologies.

According to MCAS Beaufort, the Base population includes 4,210 Military personnel, 1,118 civilians and 5,327 Military family members — totalling 10,655 persons. It is estimated that approximately 60% of the employed personnel and their families live off base. This translates into a population of approximately 8,525, or some 3,674 households, many of which are reported to live outside the City of Beaufort. This is reportedly due to the issue of affordability of housing and housing choices in Beaufort. While the number of families living outside of Beaufort is not clear, it is likely that there is limited connection between those base employees and enlisted personnel living elsewhere and the City of Beaufort. Therefore, the primary impact to Beaufort currently includes the base daytime employment population to support retail uses, restaurants and services in and around the base along Boundary Street.

Appendix Highlights

B.1 Market Assessment Data

B.2 Quality of Life Assessment

Note on the Population Figures and Estimates:

The demographic and population information that is presented in this Appendix differs from the population estimates that are found in Section 3.2. This slight difference exists because the source data for the Census Bureau and that used by ESRI (the source of the demographic information shown in this Appendix) are slightly different. The table on page 20 illustrates the various population trends depicted by the three predominate sources of information - the Regional Plan, the Census Bureau, and the ESRI Market Snapshot.

The information presented in this Appendix is geared primarily for use by real estate professionals in determining the market conditions for various development activities. This data is much more important as a regional aggregation because of the regional travel patterns and the often large disconnect between the urbanized areas and the actual corporate limits of the various municipal boundaries (e.g., most of Lady's Island).

CBSAs: Hilton Head Island-Beaufort, SC Micropolitan Statistical Area

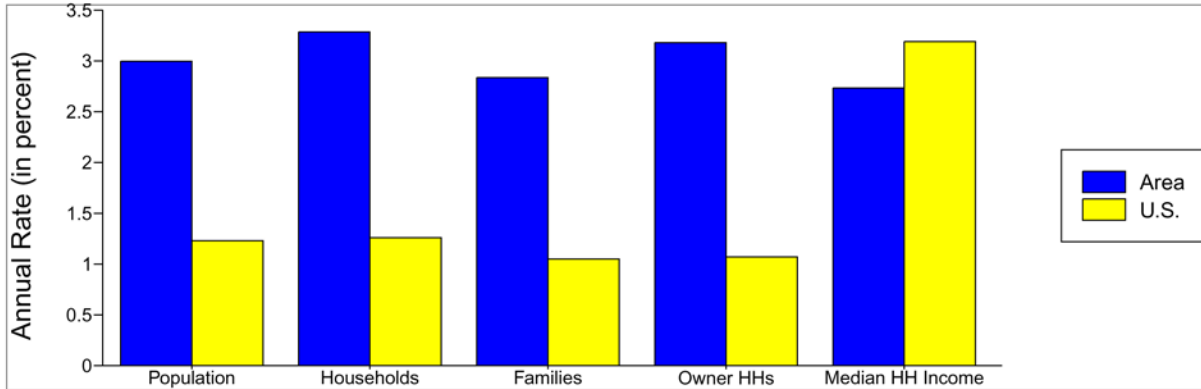
Summary	2000		2008		2013	
Population	141,615		181,258		210,087	
Households	52,574		70,362		82,706	
Families	38,152		49,273		56,669	
Average Household Size	2.54		2.47		2.45	
Owner Occupied HUs	38,807		51,780		60,555	
Renter Occupied HUs	13,767		18,582		22,151	
Median Age	35.5		39.4		41.0	
Trends: 2008-2013 Annual Rate	Area				National	
Population	3%				1.23%	
Households	3.29%				1.26%	
Families	2.84%				1.05%	
Owner HHs	3.18%				1.07%	
Median Household Income	2.73%				3.19%	
	2000		2008		2013	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< \$15,000	7,086	13.5%	6,724	9.6%	6,494	7.9%
\$15,000 - \$24,999	6,221	11.8%	5,771	8.2%	4,966	6.0%
\$25,000 - \$34,999	6,729	12.8%	6,796	9.7%	5,616	6.8%
\$35,000 - \$49,999	9,110	17.3%	9,702	13.8%	11,101	13.4%
\$50,000 - \$74,999	10,620	20.2%	14,150	20.1%	19,071	23.1%
\$75,000 - \$99,999	5,308	10.1%	11,165	15.9%	12,392	15.0%
\$100,000 - \$149,999	4,198	8.0%	8,576	12.2%	11,019	13.3%
\$150,000 - \$199,000	1,439	2.7%	3,231	4.6%	4,912	5.9%
\$200,000+	1,832	3.5%	4,247	6.0%	7,135	8.6%
Median Household Income	\$44,914		\$59,520		\$68,110	
Average Household Income	\$62,327		\$83,487		\$99,763	
Per Capita Income	\$23,739		\$32,850		\$39,705	
	2000		2008		2013	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	9,609	6.8%	11,879	6.6%	13,676	6.5%
5 - 9	9,635	6.8%	10,564	5.8%	11,971	5.7%
10 - 14	9,306	6.6%	10,272	5.7%	11,438	5.4%
15 - 19	10,205	7.2%	12,004	6.6%	12,966	6.2%
20 - 24	11,529	8.1%	13,507	7.5%	15,243	7.3%
25 - 34	19,497	13.8%	23,076	12.7%	26,116	12.4%
35 - 44	19,715	13.9%	21,518	11.9%	22,982	10.9%
45 - 54	16,557	11.7%	23,132	12.8%	26,945	12.8%
55 - 64	14,539	10.3%	22,892	12.6%	28,882	13.7%
65 - 74	12,602	8.9%	18,070	10.0%	22,225	10.6%
75 - 84	6,651	4.7%	10,843	6.0%	12,842	6.1%
85+	1,770	1.2%	3,501	1.9%	4,801	2.3%
	2000		2008		2013	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	94,217	66.5%	117,651	64.9%	134,917	64.2%
Black Alone	39,900	28.2%	49,988	27.6%	56,713	27.0%
American Indian Alone	397	0.3%	613	0.3%	778	0.4%
Asian Alone	1,045	0.7%	1,827	1.0%	2,506	1.2%
Pacific Islander Alone	73	0.1%	121	0.1%	162	0.1%
Some Other Race Alone	4,138	2.9%	8,017	4.4%	11,034	5.3%
Two or More Races	1,845	1.3%	3,041	1.7%	3,977	1.9%
Hispanic Origin (Any Race)	9,398	6.6%	16,935	9.3%	23,017	11.0%

Data Note: Income is expressed in current dollars.

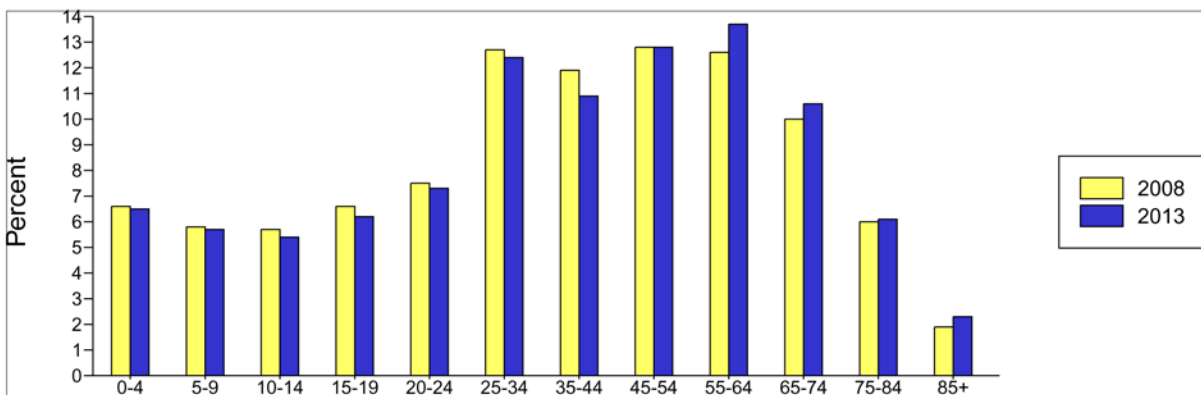
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

CBSAs: Hilton Head Island-Beaufort, SC Micropolitan Statistical Area

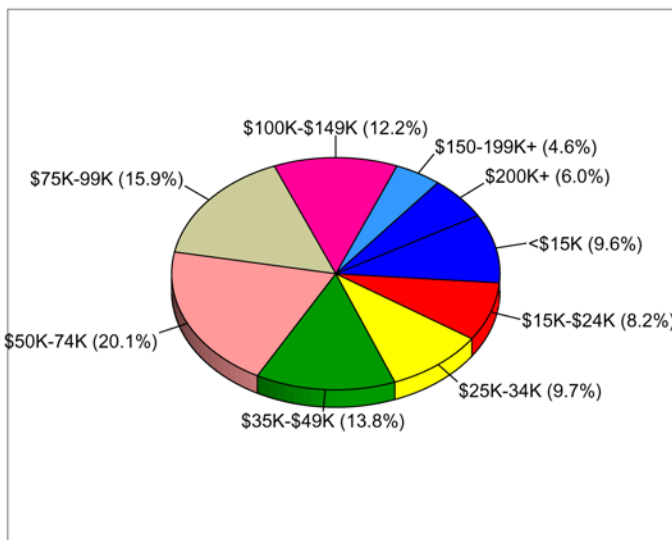
Trends 2008-2013



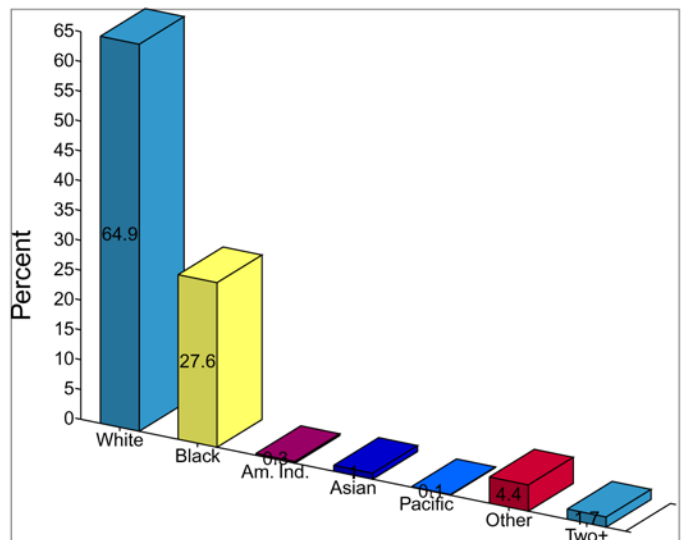
Population by Age



2008 Household Income



2008 Population by Race



2008 Percent Hispanic Origin: 9.3%

Micropolitan Area:

United States Micropolitan Statistical Areas, as defined by the Census Bureau and the Office of Management and Budget, are urban areas in the United States based around a core city or town with a population of 10,000 to 49,999. The micropolitan area designation was created in 2003. Like the better-known metropolitan area, a micropolitan area is a geographic entity used for statistical purposes based on counties and county-equivalents.

Counties: Beaufort, SC

Summary	2000	2008	2013
Population	120,937	158,053	185,114
Households	45,532	62,172	73,772
Families	33,060	43,562	50,575
Average Household Size	2.51	2.44	2.43
Owner Occupied HUs	33,338	45,430	53,698
Renter Occupied HUs	12,194	16,742	20,074
Median Age	35.8	40.2	41.8

Trends: 2008-2013 Annual Rate	Area	National
Population	3.21%	1.23%
Households	3.48%	1.26%
Families	3.03%	1.05%
Owner HHs	3.4%	1.07%
Median Household Income	2.4%	3.19%

Households by Income	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	5,342	11.7%	5,148	8.3%	4,959	6.7%
\$15,000 - \$24,999	5,019	11.0%	4,679	7.5%	3,936	5.3%
\$25,000 - \$34,999	5,831	12.8%	5,795	9.3%	4,678	6.3%
\$35,000 - \$49,999	7,929	17.4%	8,451	13.6%	9,848	13.3%
\$50,000 - \$74,999	9,395	20.6%	12,693	20.4%	17,213	23.3%
\$75,000 - \$99,999	4,920	10.8%	10,187	16.4%	11,298	15.3%
\$100,000 - \$149,999	3,952	8.7%	8,022	12.9%	10,313	14.0%
\$150,000 - \$199,000	1,365	3.0%	3,108	5.0%	4,635	6.3%
\$200,000+	1,765	3.9%	4,089	6.6%	6,892	9.3%
Median Household Income	\$47,219		\$62,239		\$70,081	
Average Household Income	\$65,608		\$87,414		\$104,352	
Per Capita Income	\$25,377		\$34,800		\$41,987	

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	8,110	6.7%	10,158	6.4%	11,843	6.4%
5 - 9	8,033	6.6%	8,955	5.7%	10,268	5.5%
10 - 14	7,747	6.4%	8,689	5.5%	9,756	5.3%
15 - 19	8,722	7.2%	10,407	6.6%	11,277	6.1%
20 - 24	10,002	8.3%	11,875	7.5%	13,497	7.3%
25 - 34	16,434	13.6%	19,615	12.4%	22,654	12.2%
35 - 44	16,433	13.6%	18,109	11.5%	19,499	10.5%
45 - 54	14,019	11.6%	19,931	12.6%	23,404	12.6%
55 - 64	12,683	10.5%	20,457	12.9%	25,951	14.0%
65 - 74	11,329	9.4%	16,603	10.5%	20,539	11.1%
75 - 84	5,913	4.9%	10,060	6.4%	11,985	6.5%
85+	1,512	1.3%	3,194	2.0%	4,441	2.4%

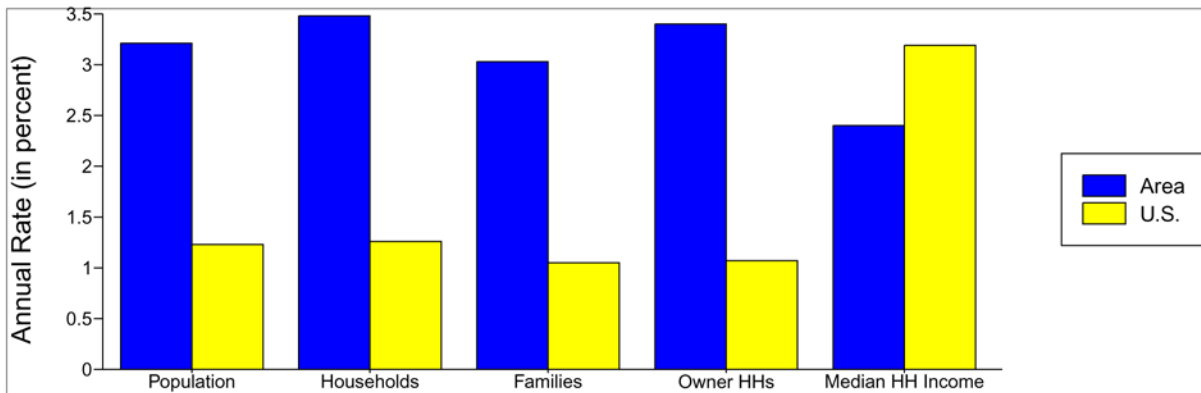
Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	85,451	70.7%	108,208	68.5%	125,031	67.5%
Black Alone	29,005	24.0%	37,872	24.0%	43,819	23.7%
American Indian Alone	321	0.3%	509	0.3%	652	0.4%
Asian Alone	953	0.8%	1,688	1.1%	2,328	1.3%
Pacific Islander Alone	63	0.1%	106	0.1%	143	0.1%
Some Other Race Alone	3,438	2.8%	6,830	4.3%	9,416	5.1%
Two or More Races	1,706	1.4%	2,840	1.8%	3,725	2.0%
Hispanic Origin (Any Race)	8,208	6.8%	15,030	9.5%	20,497	11.1%

Data Note: Income is expressed in current dollars.

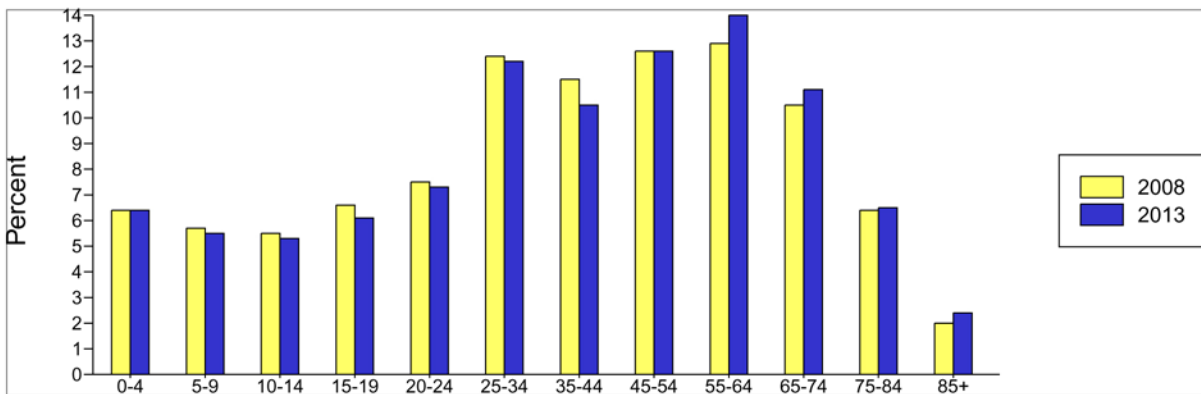
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Counties: Beaufort, SC

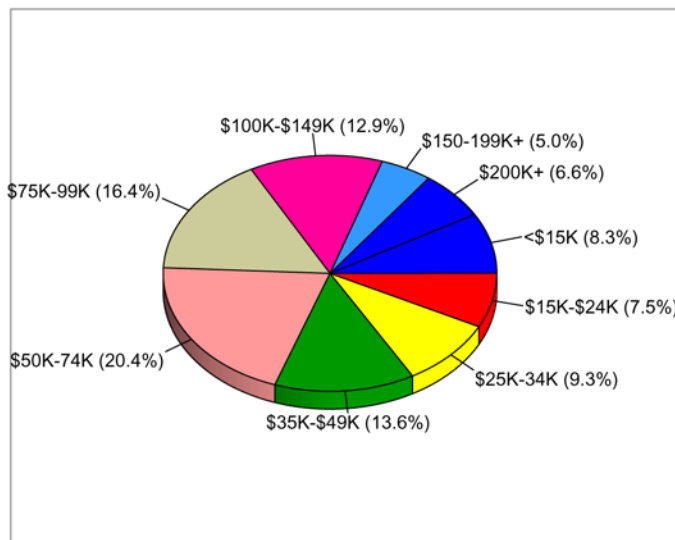
Trends 2008-2013



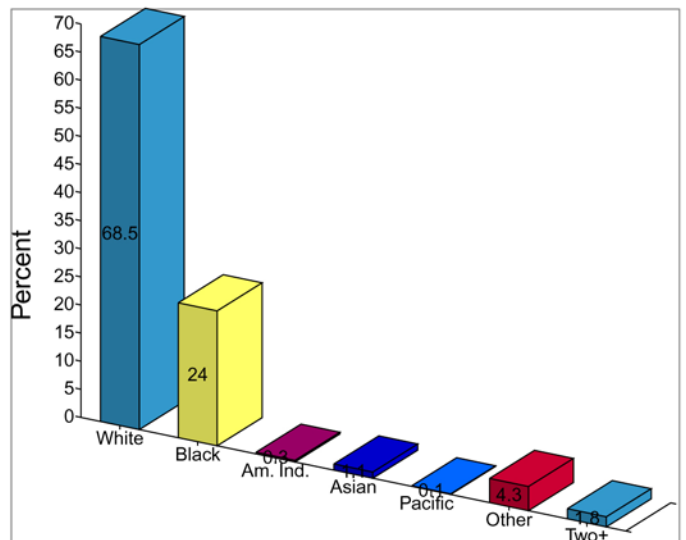
Population by Age



2008 Household Income



2008 Population by Race



2008 Percent Hispanic Origin: 9.5%

Places: Beaufort city, SC

Summary	2000	2008	2013
Population	12,950	13,281	14,340
Households	4,598	4,927	5,422
Families	3,036	3,010	3,209
Average Household Size	2.37	2.32	2.31
Owner Occupied HUs	2,692	2,557	2,765
Renter Occupied HUs	1,906	2,371	2,658
Median Age	30.2	31.4	32.5

Trends: 2008-2013 Annual Rate	Area	National
Population	1.55%	1.23%
Households	1.93%	1.26%
Families	1.29%	1.05%
Owner HHs	1.58%	1.07%
Median Household Income	5.51%	3.19%

Households by Income	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	831	18.1%	671	13.6%	596	11.0%
\$15,000 - \$24,999	732	15.9%	560	11.4%	449	8.3%
\$25,000 - \$34,999	624	13.6%	598	12.1%	495	9.1%
\$35,000 - \$49,999	891	19.4%	781	15.9%	819	15.1%
\$50,000 - \$74,999	780	17.0%	1,071	21.7%	1,475	27.2%
\$75,000 - \$99,999	262	5.7%	587	11.9%	794	14.6%
\$100,000 - \$149,999	264	5.7%	350	7.1%	423	7.8%
\$150,000 - \$199,000	121	2.6%	142	2.9%	144	2.7%
\$200,000+	92	2.0%	167	3.4%	226	4.2%
Median Household Income	\$36,617		\$46,397		\$60,657	
Average Household Income	\$50,677		\$63,710		\$73,006	
Per Capita Income	\$20,501		\$25,402		\$29,489	

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	911	7.0%	938	7.1%	1,025	7.1%
5 - 9	748	5.8%	770	5.8%	823	5.7%
10 - 14	700	5.4%	720	5.4%	780	5.4%
15 - 19	903	7.0%	890	6.7%	959	6.7%
20 - 24	2,055	15.9%	1,880	14.2%	1,978	13.8%
25 - 34	2,037	15.7%	2,148	16.2%	2,078	14.5%
35 - 44	1,706	13.2%	1,693	12.7%	1,891	13.2%
45 - 54	1,378	10.6%	1,488	11.2%	1,639	11.4%
55 - 64	927	7.2%	1,170	8.8%	1,425	9.9%
65 - 74	765	5.9%	744	5.6%	846	5.9%
75 - 84	613	4.7%	573	4.3%	589	4.1%
85+	207	1.6%	267	2.0%	307	2.1%

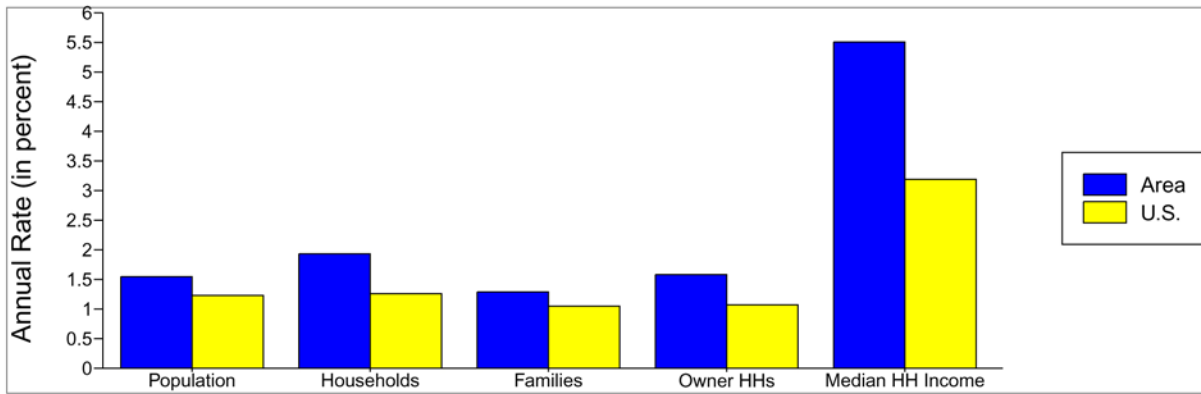
Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	8,988	69.4%	8,489	63.9%	8,955	62.4%
Black Alone	3,256	25.1%	3,698	27.8%	4,000	27.9%
American Indian Alone	41	0.3%	56	0.4%	68	0.5%
Asian Alone	138	1.1%	229	1.7%	301	2.1%
Pacific Islander Alone	16	0.1%	19	0.1%	26	0.2%
Some Other Race Alone	257	2.0%	430	3.2%	548	3.8%
Two or More Races	254	2.0%	360	2.7%	443	3.1%
Hispanic Origin (Any Race)	568	4.4%	921	6.9%	1,171	8.2%

Data Note: Income is expressed in current dollars.

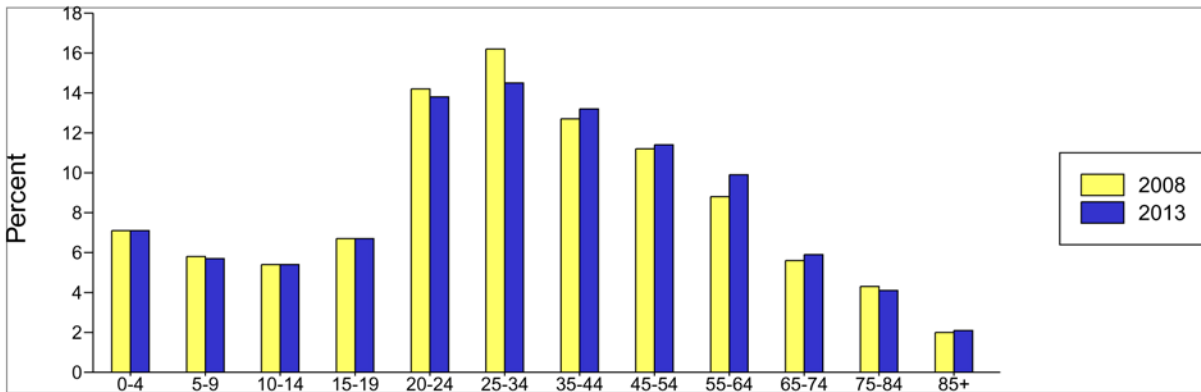
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Places: Beaufort city, SC

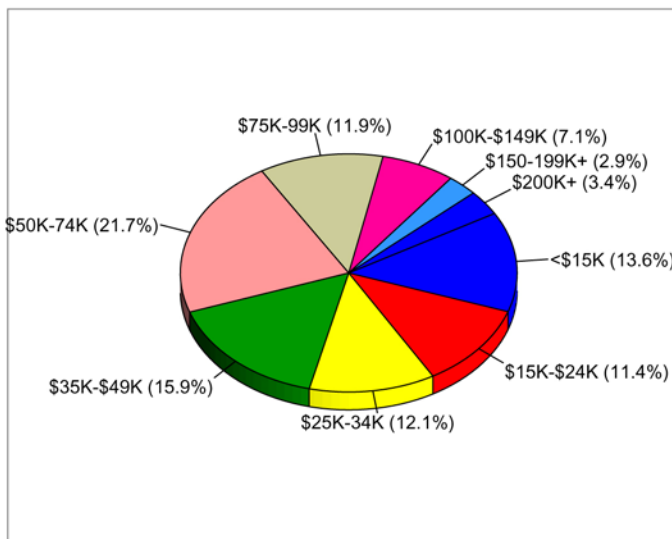
Trends 2008-2013



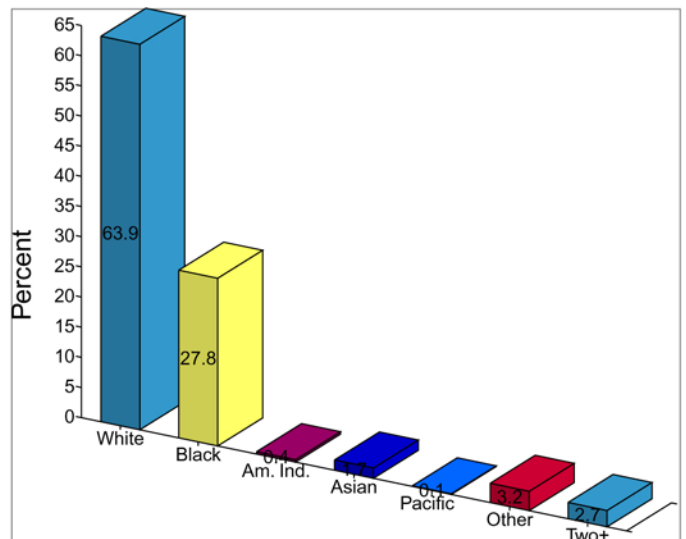
Population by Age



2008 Household Income



2008 Population by Race



2008 Percent Hispanic Origin: 6.9%

B.2 QUALITY OF LIFE ASSESSMENT

The factors that define quality of life are subjective. After discussing which are important to the community, we provide an assessment of ten key factors which determine the quality of life in the market, which is how those choosing to live or locate a business in the community will view it. How a community views itself — its image and communications both internally and externally assist in defining its culture, which impacts its competitive advantages as a place to live, work and play. In all ten factors, the indicators suggest that Beaufort places its quality of life high as its competitive advantage. Beaufort’s current message both internally and externally is one of change. Therefore it should place its focus on renewed investment and the potential for a vibrant future.

Quality of Life Factor	Study Area Status Beaufort, SC	Report Card Indicators A-Excellent; B-Good; C-Fair; D-Needs Attention/Improvement
Public Open Space & Recreation; Preservation of Eco-Systems	Multiple parks including its most notable: Waterfront Park. New Rails to Trails & Southside park pending. High value on area Ecosystem.	A Review park programming and connectivity.
Arts & Culture	Strong arts sector; active Arts Council; galleries and arts in the downtown.	A Review connectivity; target this sector - expand public participation.
Historic Preservation	Active program for Historic Preservation for housing in neighborhoods surrounding downtown.	B Review incentives for Historic Preservation; balance costs to preserve to facilitate further renovation/preservation in downtown.
Health Care	Beaufort Memorial Hospital -quality health care with strong heart and cancer program as Duke affiliate; non-profit; Naval Hospital on the waterfront.	B Communicate success stories and relationship to the community.
Education	University & Technical colleges in the region - a strong component for Higher Education & workforce (re)training; Elementary education in public districts appear stable.	B Actively collaborate between public system (K-12) and university/colleges. Expand relationships between public educational organizations to expand on workforce training efforts by Chamber/Economic Development Council.
Accessibility & Transportation	Interstates (1) ; Air (1) ; Water/Port; Active effort for Port expansion	C Review connectivity and quality of transportation options; assess parking in downtown areas.
Labor & Employment Opportunities	Commerce Park; relocation of government facilities to Boundary Street area.	C Diversify economy & job training. Focus on adding employment in downtown and around base.
Goods & Services	Emerging retail and restaurants; hospital & medical nearby; expanding churches.	B Identify, connect and cluster uses in key priority areas; such as downtown & Boundary St. town centre.
Housing	Challenged with affordability; preservation and new development costs.	C Implement recommendations of Workforce Housing study; continue workgroups discussing this issue.
Crime	Stable. Challenged in some areas but improving.	B Public safety assessment; implement neighborhood watch.

**LOWCOUNTRY JOINT
LAND USE STUDY
(JLUS) PLAN**

The JLUS planning process began officially in April, 1999, when the councils of Beaufort County, the City of Beaufort and the Town of Port Royal passed uniform resolutions recognizing “that continued operation of the Marine Corps Air Station (MCAS) Beaufort is important to the local economy and the Lowcountry regional economy and that its future operational capacity should be protected.”

The JLUS process requires a valid noise and safety study to serve as the foundation for and a reference point for making planning decisions. In the mid-1970’s, the DoD established programs in response to existing and potential threats of incompatible land developments that were compromising the defense missions at military installations. The AICUZ studies are based on sophisticated, computer-based noise models, Federal Aviation Administration guidelines, DoD Directives, and community land use planning principals and practices.



**Lowcountry
Joint Land Use Study (JLUS)
Plan**

Lowcountry Council of Governments
September 2004