



# **The People and the Economy of the Lowcountry: A Demographic Overview**

Planning Department  
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## Introduction

The Lowcountry Region, comprised of Beaufort, Colleton, Hampton and Jasper counties, experienced unprecedented growth, development, and change between 1990 and 2005. More recently, mirroring the national trend, there has been an economic downturn that has negatively impacted the Lowcountry Region, although not to the extent that it has some other parts of the country. There is a great deal of quantitative information and data available that both confirms and explains what has taken place. The United States Census Bureau, United States Bureau of Labor Statistics, South Carolina Labor Market Information (SCLMI), and constituent counties and municipalities of the Lowcountry all maintain a variety of data and statistics. This report is an attempt to summarize, analyze and synthesize all of this data into one easily accessible, condensed, and useable document.

The most recent figures available have been utilized, although some data may still be a few years old. The Planning Department continually updates and analyzes this data when it becomes available.

## The Lowcountry Region

### *Population Growth*

Between 1990 and 2000, the four counties of South Carolina's Lowcountry—Beaufort, Colleton, Hampton and Jasper—together were one of the fastest growing Regions in the state, with Beaufort County being the fastest growing among the larger counties and Jasper County in the top ranks of the smaller counties.

**Table 1: Population in the Lowcountry: 1990-2000**

|                        | <b>1990<br/>Census</b> | <b>2000<br/>Census</b> | <b>Percent<br/>Growth</b> |
|------------------------|------------------------|------------------------|---------------------------|
| <b>Beaufort County</b> | 86,425                 | 120,937                | 39.9                      |
| <b>Colleton County</b> | 34,377                 | 38,264                 | 11.3                      |
| <b>Hampton County</b>  | 18,191                 | 21,386                 | 17.6                      |
| <b>Jasper County</b>   | 15,487                 | 20,678                 | 33.5                      |
| <b>Regional Total</b>  | 154,480                | 201,265                | 30.3                      |
| <b>South Carolina</b>  | 3,486,703              | 4,012,012              | 15.1                      |

Source: US Census

From 2001 through 2010, growth in the Lowcountry slowed, although Beaufort County's pace continues to be the fastest in the Region (see Table 2 on following page).

**Table 2: Population Change in the Lowcountry: 2000-2010**

|  | <b>2000<br/>Census</b> | <b>2010<br/>Census</b> | <b>Percent Change</b> |
|--|------------------------|------------------------|-----------------------|
| <b>Beaufort County</b>                   | <b>120,937</b>         | <b>162,233</b>         | <b>34.15%</b>         |
| Beaufort city                            | 12,950                 | 12,361                 | -4.55%                |
| Bluffton town                            | 1,275                  | 12,530                 | 882.75%               |
| Burton CDP                               | 7,180                  | 6,976                  | -2.84%                |
| Hilton Head Island town                  | 33,862                 | 37,099                 | 9.56%                 |
| Laurel Bay CDP                           | 6,625                  | 5,891                  | -11.08%               |
| Port Royal town                          | 3,950                  | 10,678                 | 170.33%               |
| Shell Point CDP                          | 2,856                  | 2,336                  | -18.21%               |
| Yemassee town (See Hampton County below) |                        |                        |                       |
| Balance of Beaufort County               | 52,239                 | 74,362                 | 42.35%                |
| <b>Colleton County</b>                   | <b>38,264</b>          | <b>38,892</b>          | <b>1.64%</b>          |
| Cottageville town                        | 707                    | 762                    | 7.78%                 |
| Edisto Beach town                        | 641                    | 414                    | -35.41%               |
| Jacksonboro CDP                          | N/A                    | 478                    | N/A                   |
| Lodge town                               | 114                    | 120                    | 5.26%                 |
| Smoaks town                              | 140                    | 126                    | -10.00%               |
| Walterboro city                          | 5,153                  | 5,398                  | 4.75%                 |
| Williams town                            | 116                    | 117                    | 0.86%                 |
| Balance of Colleton County               | 31,393                 | 31,477                 | 0.27%                 |
| <b>Hampton County</b>                    | <b>21,386</b>          | <b>21,090</b>          | <b>-1.38%</b>         |
| Brunson town                             | 589                    | 554                    | -5.94%                |
| Estill town                              | 2,425                  | 2,040                  | -15.88%               |
| Furman town                              | 286                    | 239                    | -16.43%               |
| Gifford town                             | 370                    | 288                    | -22.16%               |
| Hampton town                             | 2,837                  | 2,808                  | -1.02%                |
| Luray town                               | 115                    | 127                    | 10.43%                |
| Scotia town                              | 227                    | 215                    | -5.29%                |
| Varnville town                           | 2,074                  | 2,162                  | 4.24%                 |
| Yemassee town (see above)                | 807                    | 1,027                  | 27.26%                |
| Balance of Hampton County                | 11,656                 | 11,630                 | -0.22%                |
| <b>Jasper County</b>                     | <b>20,678</b>          | <b>24,777</b>          | <b>19.82%</b>         |
| Hardeeville city                         | 1,793                  | 2,952                  | 64.64%                |
| Ridgeland town                           | 2,518                  | 4,036                  | 60.29%                |
| Balance of Jasper County                 | 16,367                 | 17,789                 | 8.69%                 |
| <b>Lowcountry Total</b>                  | <b>201,265</b>         | <b>246,992</b>         | <b>22.72%</b>         |

### ***Increasing Diversity***

Along with growth, especially in Beaufort and Jasper counties, has come a significant change in the composition of the Region's population. Formerly the area's population was almost entirely comprised of African-American and white residents, with small Asian, Hispanic and Native American population segments. More recently, there has been an influx of Hispanic/Latin populations, with the largest increase in Beaufort and Jasper Counties.

**Table 3: Race and Ethnicity: 2000-2010**

|                        | Year           | Total Population | Race        |             | Origin         |
|------------------------|----------------|------------------|-------------|-------------|----------------|
|                        |                |                  | Total White | Total Black | Total Hispanic |
| <b>Beaufort County</b> | 2000           | 120,937          | 85,451      | 29,005      | 8,208          |
|                        | 2010           | 162,233          | 116,606     | 31,290      | 19,567         |
|                        | Percent Change | 2000-2010        | 34.15%      | 36.46%      | 7.88%          |
| <b>Colleton County</b> | 2000           | 38,264           | 21,245      | 16,140      | 551            |
|                        | 2010           | 38,892           | 22,173      | 15,178      | 1094           |
|                        | Percent Change | 2000-2010        | 1.64%       | 4.37%       | -5.96%         |
| <b>Hampton County</b>  | 2000           | 21,386           | 9,173       | 11,906      | 547            |
|                        | 2010           | 21,090           | 8,999       | 11,359      | 744            |
|                        | Percent Change | 2000-2010        | -1.38%      | -1.90%      | -4.59%         |
| <b>Jasper County</b>   | 2000           | 20,678           | 8,766       | 10,895      | 1,190          |
|                        | 2010           | 24,777           | 10,658      | 11,406      | 3,752          |
|                        | Percent Change | 2000-2010        | 19.82%      | 21.58%      | 4.69%          |
| <b>Lowcountry</b>      | 2000           | 201,265          | 124,365     | 67,946      | 10,496         |
|                        | 2010           | 246,992          | 158,436     | 69,233      | 25,157         |
|                        | Percent Change | 2000-2010        | 22.72%      | 27.40%      | 1.89%          |

Source: US Census

Note: The numbers of white, black, other and Hispanic add up to more than the total county populations because Hispanic residents have been counted as members of one or more of the other races as well.

## An Older Population

Different age groups in the four counties have gained or lost population, but all four counties have shown marked increases in their older and elderly populations, in line with much of the rest of the United States since the last Census.

**Table 4: Age Groups Changes: 2000-2010**

| Beaufort County   |         |         |                          | Colleton County   |        |        |                          |
|-------------------|---------|---------|--------------------------|-------------------|--------|--------|--------------------------|
|                   | 2000    | 2010    | Percent Change 2000-2010 |                   | 2000   | 2010   | Percent Change 2000-2010 |
| Total population  | 120,937 | 162,233 | 34.15%                   | Total population  | 38,264 | 38,892 | 1.64%                    |
| Under 5 years     | 8,110   | 10,960  | 35.14%                   | Under 5 years     | 2,649  | 2,579  | -2.64%                   |
| 5 to 9 years      | 8,033   | 9,566   | 19.08%                   | 5 to 9 years      | 2,957  | 2,515  | -14.95%                  |
| 10 to 14 years    | 7,747   | 8,553   | 10.40%                   | 10 to 14 years    | 3,053  | 2,706  | -11.37%                  |
| 15 to 19 years    | 8,722   | 9,956   | 14.15%                   | 15 to 19 years    | 2,889  | 2,682  | -7.17%                   |
| 20 to 24 years    | 10,002  | 11,756  | 17.54%                   | 20 to 24 years    | 2,045  | 2,229  | 9.00%                    |
| 25 to 34 years    | 16,434  | 20,137  | 22.53%                   | 25 to 34 years    | 4,682  | 4,157  | -11.21%                  |
| 35 to 44 years    | 16,433  | 17,534  | 6.70%                    | 35 to 44 years    | 5,617  | 4,709  | -16.17%                  |
| 45 to 54 years    | 14,019  | 18,580  | 32.53%                   | 45 to 54 years    | 5,478  | 5,763  | 5.20%                    |
| 55 to 59 years    | 6,397   | 9,886   | 54.54%                   | 55 to 59 years    | 2,183  | 2,869  | 31.42%                   |
| 60 to 64 years    | 6,286   | 12,273  | 95.24%                   | 60 to 64 years    | 1,783  | 2,605  | 46.10%                   |
| 65 to 74 years    | 11,329  | 20,137  | 77.75%                   | 65 to 74 years    | 2,794  | 3,635  | 30.10%                   |
| 75 to 84 years    | 5,913   | 9,698   | 64.01%                   | 75 to 84 years    | 1,641  | 1,741  | 6.09%                    |
| 85 years and over | 1,512   | 3,197   | 111.44%                  | 85 years and over | 493    | 702    | 42.39%                   |
|                   |         |         |                          |                   |        |        |                          |
| Hampton County    |         |         |                          | Jasper County     |        |        |                          |
|                   | 2,000   | 2010    | Percent Change 2000-2010 |                   | 2000   | 2010   | Percent Change 2000-2010 |
| Total population  | 21,386  | 21,090  | -1.38%                   | Total population  | 20,678 | 24,777 | 19.82%                   |
| Under 5 years     | 1,431   | 1,347   | -5.87%                   | Under 5 years     | 1,499  | 1,859  | 24.02%                   |
| 5 to 9 years      | 1,659   | 1,326   | -20.07%                  | 5 to 9 years      | 1,602  | 1,711  | 6.80%                    |
| 10 to 14 years    | 1,774   | 1,473   | -16.97%                  | 10 to 14 years    | 1,559  | 1,546  | -0.83%                   |
| 15 to 19 years    | 1,599   | 1,524   | -4.69%                   | 15 to 19 years    | 1,483  | 1,751  | 18.07%                   |
| 20 to 24 years    | 1,256   | 1,229   | -2.15%                   | 20 to 24 years    | 1,527  | 1,969  | 28.95%                   |
| 25 to 34 years    | 3,052   | 2,648   | -13.24%                  | 25 to 34 years    | 3,063  | 3,685  | 20.31%                   |
| 35 to 44 years    | 3,290   | 2,915   | -11.40%                  | 35 to 44 years    | 3,282  | 3,217  | -1.98%                   |
| 45 to 54 years    | 2,923   | 3,103   | 6.16%                    | 45 to 54 years    | 2,538  | 3,524  | 38.85%                   |
| 55 to 59 years    | 1,010   | 1,420   | 40.59%                   | 55 to 59 years    | 1,041  | 1,428  | 37.18%                   |
| 60 to 64 years    | 797     | 1,276   | 60.10%                   | 60 to 64 years    | 815    | 1,300  | 59.51%                   |
| 65 to 74 years    | 1,447   | 1,655   | 14.37%                   | 65 to 74 years    | 1,273  | 1,671  | 31.26%                   |
| 75 to 84 years    | 874     | 869     | -0.57%                   | 75 to 84 years    | 738    | 785    | 6.37%                    |
| 85 years and over | 274     | 305     | 11.31%                   | 85 years and over | 258    | 313    | 21.32%                   |

Source: US Census

## **Educational Attainment**

Educational attainment has several implications for the Lowcountry, including economic development, income potential and quality of life. Between 2000 and 2009 all of the counties in the Lowcountry have made strides to increase the number of residents who graduate from high school or equivalent level of education, as highlighted in Table 5. All of the counties also had an increase in either the percent of population that hold a bachelor or graduate degree or both.

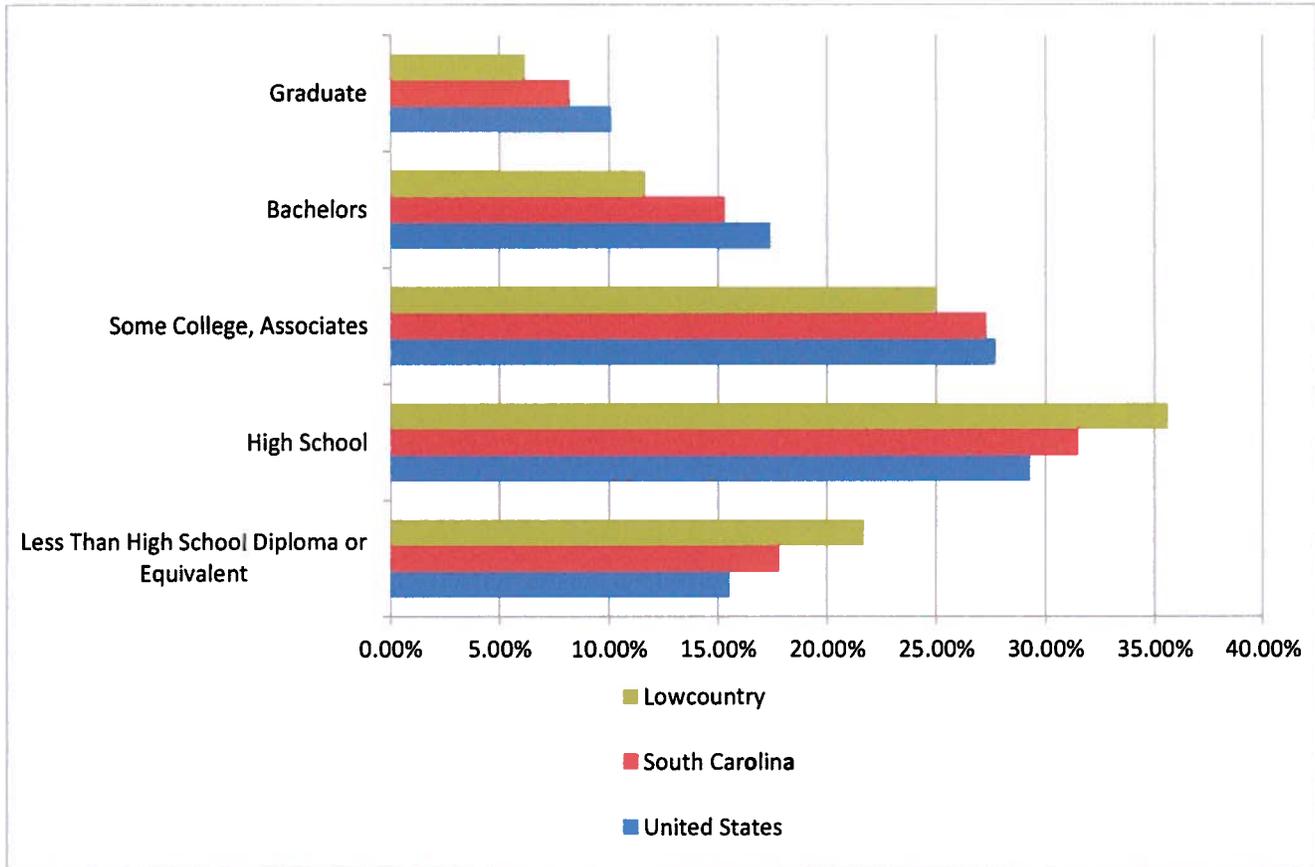
**Table 5: Educational Attainment - Highest Level Completed 2000-2009**

| <b>Educational Attainment 2000</b>          | <b>Beaufort County</b> | <b>Colleton County</b> | <b>Hampton County</b> | <b>Jasper County</b> | <b>South Carolina</b> | <b>United States</b> |
|---|------------------------|------------------------|-----------------------|----------------------|-----------------------|----------------------|
| Less Than High School Diploma or Equivalent | 12.2%                  | 30.4%                  | 33.1%                 | 34.9%                | 23.7%                 | 19.6%                |
| High School                                 | 24.2%                  | 37.0%                  | 37.8%                 | 35.9%                | 30.0%                 | 28.6%                |
| Some College, Associates                    | 30.5%                  | 21.1%                  | 19.1%                 | 20.5%                | 26.0%                 | 27.4%                |
| Bachelors                                   | 21.6%                  | 7.4%                   | 7.2%                  | 6.2%                 | 13.5%                 | 15.5%                |
| Graduate                                    | 11.6%                  | 4.2%                   | 2.9%                  | 2.6%                 | 6.9%                  | 8.9%                 |
| <b>Educational Attainment 2009</b>          |                        |                        |                       |                      |                       |                      |
| Less Than High School Diploma or Equivalent | 9.4%                   | 25.1%                  | 24.7%                 | 27.5%                | 17.8%                 | 15.5%                |
| High School                                 | 24.8%                  | 39.8%                  | 40.9%                 | 36.9%                | 31.5%                 | 29.3%                |
| Some College, Associates                    | 29.1%                  | 21.9%                  | 23.5%                 | 25.2%                | 27.3%                 | 27.7%                |
| Bachelors                                   | 23.2%                  | 9.5%                   | 6.4%                  | 7.4%                 | 15.3%                 | 17.4%                |
| Graduate                                    | 13.5%                  | 3.7%                   | 4.5%                  | 3.0%                 | 8.2%                  | 10.1%                |

**Source:** US Census, American Community Survey

Compared to the State of South Carolina and the United States, though, the Lowcountry is still behind in educational attainment. As displayed in Figure 1 (following page), the Lowcountry is below the average of both the state and nation in the percent of the population that has had some college or attained an associates, bachelors or graduate degree. This trend is not homogeneous across all of the Lowcountry counties, with Beaufort having above state and national averages in post-secondary levels of educational attainment, while the remaining counties had educational attainment levels lower than the state and national averages in 2009. The Lowcountry, as of 2009, also exceeded both the state and national averages for people who did not complete high school.

**Figure 1: Educational Attainment- Highest Level Completed**



Source: US Census

***Incomes and Poverty***

Incomes are distributed as unevenly as is growth in the Lowcountry, with Beaufort County ranking as the wealthiest and Hampton as the fourth poorest in South Carolina, according to data from the 2000 Census; only Beaufort County had incomes higher than the state average. However, without adjusting for the inflation that occurred over the course of the decade, the increases in incomes in all four counties were substantial, as shown in the following chart. Both household and per capita incomes grew at a greater rate in all four counties than the state average rate; Jasper County’s increases were the largest in the Region.

**Table 6: Income in the Lowcountry: 1990-2000**

|                        | Income Type             | 1989     | 1999     | Percent Change<br>1989/1990--<br>1999/2000 |
|------------------------|-------------------------|----------|----------|--|
| <b>Beaufort County</b> | Median Household Income | \$30,450 | \$46,992 | 54.30%                                     |
|                        | Per Capita Income       | \$15,213 | \$25,377 | 66.80%                                     |
| <b>Colleton County</b> | Median Household Income | \$20,617 | \$29,733 | 44.20%                                     |
|                        | Per Capita Income       | \$9,193  | \$14,831 | 61.30%                                     |
| <b>Hampton County</b>  | Median Household Income | \$18,615 | \$28,771 | 54.60%                                     |
|                        | Per Capita Income       | \$8,578  | \$13,129 | 53.10%                                     |
| <b>Jasper County</b>   | Median Household Income | \$18,071 | \$30,727 | 70%  |
|                        | Per Capita Income       | \$7,984  | \$14,161 | 77.40%                                     |
| <b>State Average</b>   | Median Household Income | \$26,256 | \$37,082 | 41.20%                                     |
|                        | Per Capita Income       | \$11,897 | \$18,795 | 58%  |

Source: US Census

More recent data (Table 7) show that these high growth trends slowed between 2006 and 2009. Beaufort County and especially Hampton County, who was hit the hardest by the decrease in growth, actually had a decrease in household median income between 2008 and 2009. This decrease in income is not only affecting the Lowcountry, however, as South Carolina and the United States both saw decreases in household median incomes between 2008 and 2009.

**Table 7: Lowcountry Household Median Incomes: 2006-2009**

|                        | 2006     | 2007     | 2008     | 2009     | Change<br>from 2006-<br>2009 | Change from<br>2008-2009 |
|------------------------|----------|----------|----------|----------|------------------------------|--------------------------|
| <b>Beaufort County</b> | \$50,522 | \$52,595 | \$54,356 | \$54,201 | 7.28%                        | -0.29%                   |
| <b>Colleton County</b> | n/a      | \$34,072 | \$34,679 | \$34,787 | 2.10%                        | 0.31%                    |
| <b>Hampton County</b>  | n/a      | \$34,302 | \$37,219 | \$33,760 | -1.58%                       | -9.29%                   |
| <b>Jasper County</b>   | n/a      | \$33,959 | \$32,449 | \$35,462 | 4.43%                        | 9.29%                    |
| <b>South Carolina</b>  | \$41,100 | \$42,405 | \$44,326 | \$43,480 | 5.79%                        | -1.91%                   |
| <b>United States</b>   | \$48,451 | \$50,740 | \$52,029 | \$51,369 | 6.02%                        | -1.27%                   |

Source: US Census

**Note:** The US Census' American FactFinder did not provide estimates for counties with populations less than 50,000 in 2006. The change calculations for Colleton, Hampton, and Jasper Counties use 2007 and 2008 data.

The US Department of Housing and Urban Development (HUD) estimates median family incomes every year; their data also demonstrated improvement for all four counties from 2000 to 2011.

**Table 8: Lowcountry Median Family Income: 2011**

| County   | 2000 Census | 2011 HUD Estimates | Percent Change |
|----------|-------------|--------------------|----------------|
| Beaufort | \$52,710    | \$68,891           | 30.70%         |
| Colleton | \$34,172    | \$42,942           | 25.66%         |
| Hampton  | \$34,561    | \$43,405           | 25.59%         |
| Jasper   | \$36,793    | \$45,184           | 22.81%         |

Source: HUD

All four counties made real progress in reducing the percentage of people living in poverty between 1989 and 2008; however, between 2008 and 2009 the percentage of people living below the poverty level began to rise in all the counties. In Hampton and Jasper counties poverty rates actually rose above their 1989 levels, as illustrated in Table 9. As of 2009, only Beaufort County's poverty rate was lower than the state's average.

**Table 9: Poverty Rates in the Lowcountry: 1989-2009**

|                 | 1989 | 2000 | 2005 | 2006 | 2007 | 2008 | 2009 |
|-----------------|------|------|------|------|------|------|------|
| Beaufort County | 14.1 | 10.3 | 11.5 | 11.9 | 10.4 | 10.1 | 12   |
| Colleton County | 23.9 | 19.3 | 23.9 | 22.9 | 21.7 | 21.1 | 22   |
| Hampton County  | 23.6 | 20   | 23.9 | 23.4 | 21.3 | 23.4 | 25.4 |
| Jasper County   | 24.8 | 22.2 | 24.8 | 22.4 | 20.8 | 19.8 | 25.3 |
| South Carolina  | 15.3 | 12.8 | 15.6 | 15.7 | 15.1 | 15.7 | 17.1 |

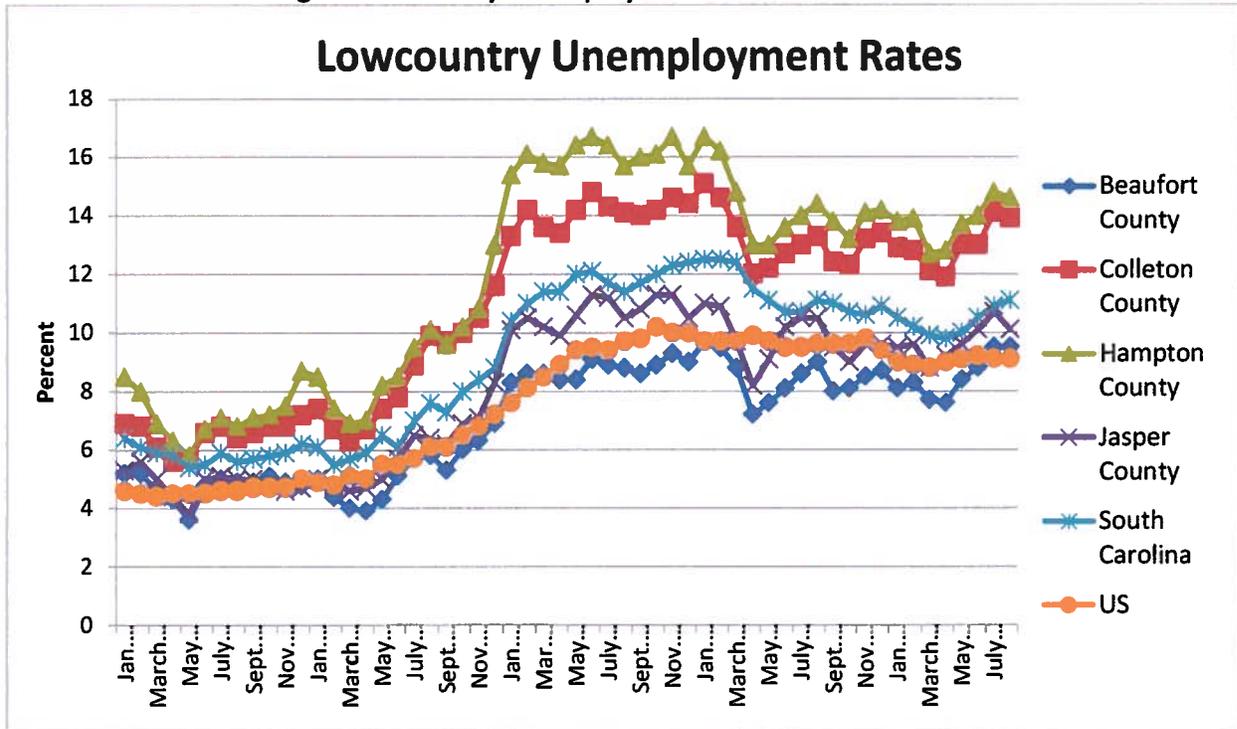
Source: US Census

## Employment and Wages

Throughout most of the period since 2004 (when the state of South Carolina adopted new methodology) Beaufort County had the lowest unemployment rate in the state and had a rate below the national average. In 2007 that changed, but by the summer of 2009 the situation was improving for all four counties. This trend was short-lived, and local county unemployment rates in the Lowcountry have been on the rise again.

A trend that has continued is that Colleton and Hampton counties have continually had unemployment rates that are significantly higher than the rest of the Region and South Carolina and US averages.

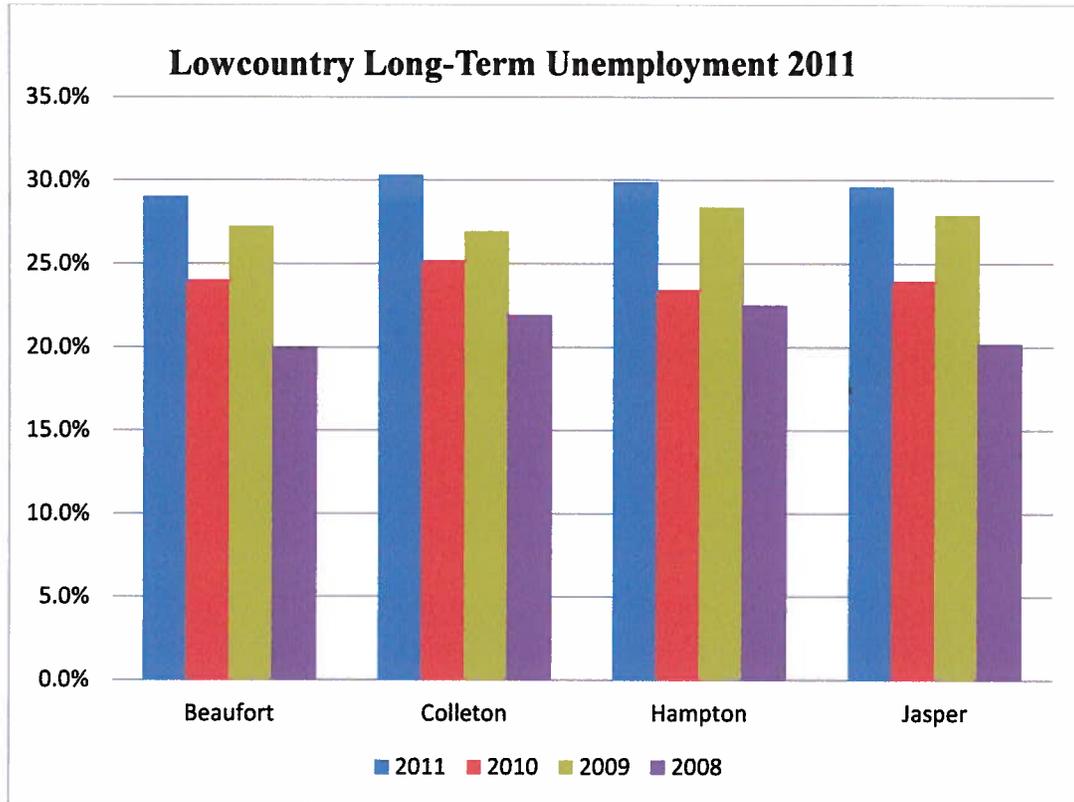
Figure 2: Monthly Unemployment Rates: 2007-2011



Source: SCLMI

Another employment indicator is the rate of long-term (16 or more weeks) unemployment. Long-term unemployment rates that had fallen between 2009 and 2010 as of June 2011 are now higher than they were in 2009. The long-term unemployment rate has continued to be significantly higher than the 2008 rate since 2009 in the Lowcountry, as figure 3 on the following page illustrates.

**Figure 3: Lowcountry Long-Term Unemployment Rates: 2008-2011**



Source: WIA

Unemployment rates do not tell the full story, however, of how well employees are doing economically. Table 10 (on the following page) shows average weekly wages for the private sector in the Lowcountry between 1995 and the first quarter of 2011. The trend from 1995 to 2010 had seen major growth in those wages, mostly notably in Jasper County, where the increase was more than 75 percent. The first quarter of the current calendar year reversed that trend. Even when unemployment was relatively low, as in Beaufort County, wages have continued to not meet the state average because of the concentration of jobs in the tourism and retail sectors of the economy.

**Table 10: Private Sector Average Weekly Wage: 1995-2010**

|                        | 1995  | 2007  | 2008  | 2009  | 2010  | Q1 2011 | Change 1995-Q1 2011 | Change 2010-Q1 2011 |
|------------------------|-------|-------|-------|-------|-------|---------|---------------------|---------------------|
| <b>Beaufort County</b> | \$404 | \$595 | \$583 | \$572 | \$579 | \$556   | 37.62%              | -3.97%              |
| <b>Colleton County</b> | \$364 | \$532 | \$535 | \$542 | \$542 | \$528   | 45.05%              | -2.58%              |
| <b>Hampton County</b>  | \$393 | \$647 | \$644 | \$645 | \$649 | \$586   | 49.11%              | -9.71%              |
| <b>Jasper County</b>   | \$309 | \$643 | \$653 | \$615 | \$594 | \$550   | 77.99%              | -7.41%              |
| <b>South Carolina</b>  | \$448 | \$668 | \$681 | \$687 | \$707 | \$714   | 59.38%              | 0.99%               |
| <b>US (median)</b>     | N/A   | N/A   | \$722 | \$739 | \$747 | \$749   | N/A                 | 0.27%               |

Source: SCLMI

SCLMI data shows the number of private sector jobs and pay for 2002 to 2010, with uneven changes across the Region. During this period Jasper County showed the greatest growth in both number of jobs and pay for not only the Lowcountry but for the whole state of South Carolina (Table 11).

**Table 11: Private Sector Jobs: 2002-2010**

|                        |                     | 2002      | 2008      | 2009      | 2010      | Percent Change 2002-2010 | Percent Change 2009-2010 |
|------------------------|---------------------|-----------|-----------|-----------|-----------|--------------------------|--------------------------|
| <b>Beaufort County</b> | Average Employment  | 46,788    | 52,545    | 48,631    | 46,777    | -0.02%                   | -3.81%                   |
|                        | Average Annual Wage | \$26,251  | \$30,304  | \$29,734  | \$30,094  | 14.64%                   | 1.21%                    |
| <b>Colleton County</b> | Average Employment  | 8,361     | 8,389     | 8,122     | 7,867     | -5.91%                   | -3.14%                   |
|                        | Average Annual Wage | \$27,156  | \$27,839  | \$28,189  | \$28,174  | 3.75%                    | -0.05%                   |
| <b>Hampton County</b>  | Average Employment  | 4,238     | 3,512     | 3,285     | 3,263     | -23.01%                  | -0.67%                   |
|                        | Average Annual Wage | \$27,262  | \$33,493  | \$33,555  | \$33,726  | 23.71%                   | 0.51%                    |
| <b>Jasper County</b>   | Average Employment  | 3,861     | 6,484     | 5,689     | 5,834     | 51.10%                   | 2.55%                    |
|                        | Average Annual Wage | \$22,931  | \$33,979  | \$31,989  | \$30,354  | 32.37%                   | -5.11%                   |
| <b>South Carolina</b>  | Average Employment  | 1,454,973 | 1,538,996 | 1,430,288 | 1,422,984 | -2.20%                   | -0.51%                   |
|                        | Average Annual Wage | \$29,476  | \$35,429  | \$35,750  | \$36,790  | 24.81%                   | 2.91%                    |

Source: SCLMI

Beaufort County, even more than the other three Lowcountry counties, has depended not only on poorly paying hospitality and service employment but also on the generally higher-paying construction industry that had grown with the area's building boom (see building permit data in subsequent sections). Table 12 below shows the change in number of jobs and total payroll for construction jobs and as a percentage of total private sector jobs between 2005 and 2010. By 2010 Beaufort County was showing the impact of a slow-down in the housing market, and this affected the total number of construction jobs for the entire Lowcountry—in spite of Jasper County's relatively unchanged percent of private sector jobs and increase in construction payroll.

**Table 12: Construction Employment and Payroll: 2002 and 2010**

|                          | 2005                    |   |                                      |                      | 2010                    |   |                                      |                      |
|--------------------------|-------------------------|---|--------------------------------------|----------------------|-------------------------|---|--------------------------------------|----------------------|
|                          | Construction Employment | Total Private Sector Jobs (average monthly) | Percent of Total Private Sector Jobs | Construction Payroll | Construction Employment | Total Private Sector Jobs (average monthly) | Percent of Total Private Sector Jobs | Construction Payroll |
| <b>Beaufort County</b>   | 6,602                   | 51,820                                      | 12.74%                               | \$247,740,328        | 3,124                   | 46,777                                      | 6.68%                                | \$114,498,354        |
| <b>Colleton County</b>   | 587                     | 8,245                                       | 7.12%                                | \$15,019,848         | 383                     | 7,868                                       | 4.87%                                | \$12,273,403         |
| <b>Hampton County</b>    | 272                     | 3,777                                       | 7.20%                                | \$7,981,618          | 192                     | 3,263                                       | 5.88%                                | \$5,931,480          |
| <b>Jasper County</b>     | 869                     | 4,763                                       | 18.24%                               | \$26,893,194         | 807                     | 5,834                                       | 13.83%                               | \$30,476,298         |
| <b>Lowcountry Region</b> | 8,330                   | 68,605                                      | 12.14%                               | \$297,634,988        | 4,506                   | 63,742                                      | 7.07%                                | \$163,179,535        |

Source: SCLMI

### **Industry**

In 2010 the leading industry for employment in the Lowcountry was retail trade, employing 19.1 percent of the Region's workers. Other major employers were healthcare and social assistance, accommodation and food services, construction, and manufacturing. Some industries played bigger roles in certain counties than in others. For instance, agriculture, forestry, fishing and hunting were leading employers in Hampton County, but were not as significant in the rest of the Region.

A breakdown of the number of employees and the percentage of the total number of employees in each industry sector within each county can be seen in the following table.

**Table 13: Employment by Private Sector Industries 2010**

| Industry                                     | South Carolina   |                | Beaufort County |                | Colleton County |                | Hampton County |                | Jasper County |                |
|--|------------------|----------------|-----------------|----------------|-----------------|----------------|----------------|----------------|---------------|----------------|
|  | # Employees      | % Employees    | # Employees     | % Employees    | # Employees     | % Employees    | # Employees    | % Employees    | # Employees   | % Employees    |
| <b>Total, all industries</b>                 | <b>1,423,071</b> | <b>100.00%</b> | <b>46,777</b>   | <b>100.00%</b> | <b>7,868</b>    | <b>100.00%</b> | <b>3,265</b>   | <b>100.00%</b> | <b>5,837</b>  | <b>100.00%</b> |
| Agriculture, forestry, fishing and hunting   | 11,332           | 0.80%          | 487             | 1.04%          | ND              | ND             | 259            | 7.93%          | 150           | 2.57%          |
| Utilities                                    | 12,051           | 0.85%          | 145             | 0.31%          | 173             | 2.20%          | 28             | 0.86%          | ND            | ND             |
| Construction                                 | 79,884           | 5.61%          | 3,124           | 6.68%          | 383             | 4.87%          | 193            | 5.91%          | 807           | 13.83%         |
| Manufacturing                                | 207,789          | 14.60%         | 736             | 1.57%          | 1,070           | 13.60%         | 568            | 17.40%         | 310           | 5.31%          |
| Wholesale trade                              | 63,849           | 4.49%          | 597             | 1.28%          | 234             | 2.97%          | 127            | 3.89%          | 169           | 2.90%          |
| Retail trade                                 | 223,248          | 15.69%         | 8,705           | 18.61%         | 1,509           | 19.18%         | 707            | 21.65%         | 1,200         | 20.56%         |
| Transportation and warehousing               | 44,477           | 3.13%          | 666             | 1.42%          | 77              | 0.98%          | 154            | 4.72%          | ND            | ND             |
| Educational services                         | 20,859           | 1.47%          | 553             | 1.18%          | 73              | 0.93%          | ND             | ND             | 77            | 1.32%          |
| Health care and social assistance            | 169,538          | 11.91%         | 5,385           | 11.51%         | 1,246           | 15.84%         | ND             | ND             | 1,065         | 18.25%         |
| Arts, entertainment, and recreation          | 25,630           | 1.80%          | 1,927           | 4.12%          | 112             | 1.42%          | ND             | ND             | 152           | 2.60%          |
| Finance and insurance                        | 65,934           | 4.63%          | 1,472           | 3.15%          | 258             | 3.28%          | 85             | 2.60%          | 89            | 1.52%          |
| Real estate and rental and leasing           | 25,853           | 1.82%          | 2,359           | 5.04%          | 146             | 1.86%          | ND             | ND             | 46            | 0.79%          |
| Administrative and waste services            | 127,761          | 8.98%          | 3,663           | 7.83%          | 483             | 6.14%          | ND             | ND             | 552           | 9.46%          |
| Accommodation and food services              | 181,305          | 12.74%         | 10,286          | 21.99%         | 1,015           | 12.90%         | ND             | ND             | 633           | 10.84%         |
| Other services, except public administration | 47,944           | 3.37%          | 3,409           | 7.29%          | 290             | 3.69%          | 145            | 4.44%          | 184           | 3.15%          |

(ND) Not Disclosable

(NC) Not Calculable, the data does not exist or it is zero

Source: BLS

## Housing

Between 1990 and 2000 (see Table 14 on the following page), in both Beaufort and Jasper County, the housing supply did not grow as fast as the population. Eliminating recreational/seasonal housing units from the housing stock resulted in a shortfall of more than 2,100 units. Scarcity led to major price increases. Although now outdated, the 1990-2000 Census data below provides a historic perspective. Between 2000 and 2010 the growth of the total number of housing units slowed, compared to the previous decade. Beaufort County continued to add to its housing supply during that decade, as it participated in the nation-wide housing boom, which ended in 2007. As a result, Beaufort now has a disproportionately large number and percentage of vacant units, compared to the other three counties.

**Table 14: Housing Stock 2000-2010**

|                        |  | 1990      | 2000      | 2010      | Percent Change<br>1990-2000 | Percent Change<br>2000-2010 |
|------------------------|--|-----------|-----------|-----------|-----------------------------|-----------------------------|
| <b>Beaufort County</b> | Total Housing Units                    | 45,981    | 60,509    | 93,023    | 31.60%                      | 53.73%                      |
|                        | Occupied Units                         | 30,712    | 45,532    | 64,945    | 48.25%                      | 42.64%                      |
|                        | Total Vacant Units                     | 15,269    | 14,977    | 28,078    | (-)1.9%                     | 87.47%                      |
|                        | Vacant Recreational/<br>Seasonal Units | 6,602     | 9,613     | 14,902    | 45.60%                      | 55.02%                      |
|                        | Median House Price                     | \$112,100 | \$213,900 | N/A       | 90.80%                      | N/A                         |
|                        | Median Gross Rent                      | \$423     | \$690     | N/A       | 63.10%                      | N/A                         |
| <b>Colleton County</b> | Total Housing Units                    | 14,926    | 18,129    | 19,901    | 21.50%                      | 9.77%                       |
|                        | Occupied Units                         | 12,040    | 14,470    | 15,131    | 20.20%                      | 4.57%                       |
|                        | Total Vacant Units                     | 2,886     | 3,659     | 4,770     | 26.80%                      | 30.36%                      |
|                        | Vacant Recreational/<br>Seasonal Units | 861       | 1,907     | 1,433     | 121.50%                     | -24.86%                     |
|                        | Median House Price                     | \$47,400  | \$73,200  | N/A       | 54.40%                      | N/A                         |
|                        | Median Gross Rent                      | \$177     | \$405     | N/A       | 128.80%                     | N/A                         |
| <b>Hampton County</b>  | Total Housing Units                    | 7,058     | 8,582     | 9,140     | 21.60%                      | 6.50%                       |
|                        | Occupied Units                         | 6,322     | 7,444     | 7,598     | 17.80%                      | 2.07%                       |
|                        | Total Vacant Units                     | 736       | 1,138     | 1,542     | 54.60%                      | 35.50%                      |
|                        | Vacant Recreational/<br>Seasonal Units | 90        | 300       | 392       | 233.30%                     | 30.67%                      |
|                        | Median House Price                     | \$43,700  | \$62,300  | N/A       | 42.60%                      | N/A                         |
|                        | Median Gross Rent                      | \$138     | \$370     | N/A       | 168.10%                     | N/A                         |
| <b>Jasper County</b>   | Total Housing Units                    | 6,070     | 7,928     | 10,299    | 30.60%                      | 29.91%                      |
|                        | Occupied Units                         | 5,298     | 7,042     | 8,517     | 32.90%                      | 20.95%                      |
|                        | Total Vacant Units                     | 772       | 886       | 1,782     | 14.80%                      | 101.13%                     |
|                        | Vacant Recreational/<br>Seasonal Units | 147       | 233       | 374       | 58.50%                      | 60.52%                      |
|                        | Median House Price                     | \$44,400  | \$77,600  | N/A       | 74.80%                      | N/A                         |
|                        | Median Gross Rent                      | \$180     | \$493     | N/A       | 173.90%                     | N/A                         |
| <b>South Carolina</b>  | Total Housing Units                    | 1,424,155 | 1,753,670 | 2,137,683 | 23.14%                      | 21.90%                      |
|                        | Occupied Units                         | 1,258,044 | 1,533,854 | 1,801,181 | 21.90%                      | 17.43%                      |
|                        | Total Vacant Units                     | 166,111   | 219,816   | 336,502   | 32.30%                      | 53.08%                      |
|                        | Vacant Recreational/<br>Seasonal Units | 49,843    | 70,198    | 112,531   | 40.80%                      | 60.31%                      |
|                        | Median House Price                     | \$61,100  | \$94,900  | N/A       | 55.30%                      | N/A                         |
|                        | Median Gross Rent                      | \$276     | \$510     | N/A       | 84.80%                      | N/A                         |

Source: US Census \* If any data not currently available becomes available at a later date this table will be amended accordingly.

As part of their annual Census Estimates program, the US Census Bureau has added a yearly assessment of the number of housing units for each county. Table 15 outlines the growth in both number and percentage of housing units between the April 2000 and 2010 census. During this period the rate of housing unit growth was greater than the increase in population, leading to a surplus of housing units, especially in Beaufort County, as graphically displayed in Figure 4 on the following page. A corresponding decrease in property values is already starting to occur.

**Table 15: Increase in Number of Housing Units: 2000-2010**

| <b>Population on July 1</b>     | <b>Beaufort County</b> | <b>Colleton County</b> | <b>Hampton County</b> | <b>Jasper County</b> |
|---------------------------------|------------------------|------------------------|-----------------------|----------------------|
| April 1, 2000<br>(Census 2000)  | 60,509                 | 18,129                 | 8,582                 | 7,928                |
| <b>2000</b>                     | 61,192                 | 18,179                 | 8,594                 | 7,952                |
| <b>2001</b>                     | 63,951                 | 18,411                 | 8,662                 | 8,068                |
| <b>2002</b>                     | 65,971                 | 18,496                 | 8,687                 | 8,148                |
| <b>2003</b>                     | 68,474                 | 18,683                 | 8,701                 | 8,210                |
| <b>2004</b>                     | 71,082                 | 18,751                 | 8,700                 | 8,247                |
| <b>2005</b>                     | 73,809                 | 18,813                 | 8,700                 | 8,330                |
| <b>2006</b>                     | 78,198                 | 18,908                 | 8,711                 | 8,491                |
| <b>2007</b>                     | 81,383                 | 18,998                 | 8,723                 | 8,737                |
| <b>2008</b>                     | 83,362                 | 19,140                 | 8,719                 | 9,203                |
| <b>2009</b>                     | 84,530                 | 19,377                 | 8,828                 | 9,860                |
| <b>2010<br/>(Census 2010)</b>   | 93,023                 | 19,901                 | 9,140                 | 10,299               |
| <b>Percent Change 2000-2010</b> | <b>52.02%</b>          | <b>9.47%</b>           | <b>6.35%</b>          | <b>29.51%</b>        |

Source: US Census

Residential building permit data—for new construction only—for the four counties is available for every year beginning in 1998, and can be obtained upon request. 2006 was the peak year in residential construction for every county in the Lowcountry except Colleton, with Beaufort County leading the way.

Table 16 (on the following page) shows the number of building permits issued each year for the construction of new dwelling units between 2005 and 2010. It highlights both the peak years and the decline in construction, especially in Beaufort County.

**Table 16: Building Permits for New Housing 2005-2010**

| County   | Type                  | 2005               | 2006               | 2007               | 2008             | 2009             | 2010             |
|----------|-----------------------|--------------------|--------------------|--------------------|------------------|------------------|------------------|
| Beaufort | SF Number             | 4016               | 6192               | 3893               | 666              | 688              | 524              |
|          | SF Value              | \$1,671,119,962.00 | \$1,057,161,044.00 | \$1,343,144,998.00 | \$450,972,365.00 | \$219,503,898.00 | \$175,449,645.87 |
|          | Average SF (w/o Land) | \$416,115.53       | \$253,813.15       | \$345,015.00       | \$677,135.68     | \$333,721.40     | \$456,835.82     |
|          | MF Number             | 444                | 54                 | 492                | 92               | 36               | 6                |
|          | MF Value              | \$138,403,192.00   | \$117,184,432.00   | \$61,436,226.00    | \$77,283,251.00  | \$5,063,468.20   | \$116,877.00     |
|          |                       |                    |                    |                    |                  |                  |                  |
| Colleton | SF Number             | 111                | 135                | 15                 | 250              | 55               | 73               |
|          | SF Value              | \$16,764,886.00    | \$27,400,588.00    | \$2,266,550.00     | \$11,373,615.00  | \$9,430,791.00   | \$8,501,518.00   |
|          | Average SF (w/o Land) | \$151,035.00       | \$202,967.32       | \$151,103.33       | \$45,518.46      | \$173,626.26     | \$116,459.00     |
|          | MH Number             | 0                  | 101                | 290                | 290              | 220              | 177              |
|          | MH Value              | \$0.00             | \$0.00             | \$0.00             | \$7,373,891.00   | \$3,595,301.00   | N/A              |
|          | MF Number             | 0                  | 0                  | 0                  | 4                | 0                | 0                |
|          | MF Value              | \$0.00             | \$0.00             | \$1,462,180.00     | \$0.00           | \$0.00           | \$0.00           |
|          |                       |                    |                    |                    |                  |                  |                  |
| Hampton  | SF Number             | 35                 | 49                 | 28                 | 33               | 27               | 15               |
|          | SF Value              | \$3,120,747.00     | \$5,516,856.00     | \$4,071,564.00     | \$9,135,952.23   | \$6,278,779.36   | \$2,478,754.00   |
|          | Average SF (w/o Land) | \$89,164.20        | \$112,588.90       | \$145,413.00       | \$203,021.00     | \$232,547.38     | \$165,250.00     |
|          | MH Number             | 209                | 148                | 32                 | 13               | 14               | 18               |
|          | MH Value              | \$2,972,250.00     | \$3,165,301.93     | \$1,998,324.00     | \$4,000,000.00   | \$799,390.00     | \$1,148,717.00   |
|          | MF Number             | 1                  | 0                  | 1                  | 15               | 0                | 0                |
|          | MF Value              | \$75,000.00        | \$0.00             | \$149,799.00       | \$27,232,885.32  | \$0.00           | \$0.00           |
|          |                       |                    |                    |                    |                  |                  |                  |
| Jasper   | SF Number             | 161                | 276                | 274                | 90               | 125              | 127              |
|          | SF Value              | \$16,505,249.00    | \$26,247,502.87    | \$43,950,099.00    | \$18,907,155.49  | \$29,109,235.00  | \$28,716,768.32  |
|          | Average SF (w/o Land) | \$85,000.00        | \$115,627.76       | \$160,401.82       | \$210,079.50     | \$196,618.29     | \$487,564.56     |
|          | MH Number             | 161                | N/A                | N/A                | 122              | 96               | 83               |
|          | MH Value              | \$6,000,000.00     | \$0.00             | N/A                | N/A              | \$3,861,184.00   | N/A              |
|          | MF Number             | 8                  | N/A                | 16                 | 15               | 0                | 10               |
| MF Value | \$2,921,000.00        | \$1,041,626.92     | \$48,437,220.00    | \$0.00             | \$0.00           | \$4,983,598.00   |                  |

Source: County, City and Town Building Departments

**Note:** In Beaufort County stick-built and manufactured home building permit data is combined and averaged together; in the other three, the data is recorded separately and the average value here is for stick-built homes only.

### Commercial Development and Retail Sales

New commercial development, which includes a large retail component, has also increased in the Lowcountry, but more slowly than residential construction. As the largest and fastest-growing county, Beaufort led the way during the period, although the level and value of activity in Jasper County was significant.

The following table shows building permits issued for all new commercial and institutional projects during that period

**Table 17: Building Permits for New Commercial and Industrial Construction: 2005-2010**

| County   | Type              | 2005             | 2006               | 2007            | 2008            | 2009            | 2010            |
|----------|-------------------|------------------|--------------------|-----------------|-----------------|-----------------|-----------------|
| Beaufort | Commercial Number | 248              | 195                | 158             | 42              | 54              | 33              |
|          | Commercial Value  | \$109,877,248.00 | \$1,376,330,900.00 | \$89,737,010.00 | \$27,264,969.00 | \$13,732,542.00 | \$25,762,375.00 |
| Colleton | Commercial Number | 24               | 8                  | 11              | 80              | 15              | 30              |
|          | Commercial Value  | \$15,117,550.00  | \$5,325,400.00     | \$9,603,749.00  | \$8,914,539.00  | \$5,832,618.00  | \$4,319,882.00  |
| Hampton  | Commercial Number | 4                | 12                 | 4               | 14              | 1               | 4               |
|          | Commercial Value  | \$1,239,000.00   | \$1,954,390.00     | \$10,268,260.00 | \$8,601,918.70  | \$1,375,000.00  | \$786,301.00    |
| Jasper   | Commercial Number | 31               | N/A                | 4               | 37              | 17              | 18              |
|          | Commercial Value  | \$17,233,724.00  | \$8,609,237.84     | \$29,386,213.00 | \$20,315,813.00 | \$16,880,358.42 | \$4,817,926.48  |

Source: County, City and Town Building Departments

As a result of the population and economic growth in the Lowcountry, net taxable sales climbed significantly in all four counties from 2003-4 to 2006-7, but then began dropping the next fiscal year, with the decline in Jasper County being the most notable. **NOTE:** 2008-2009 data is the most recent data available.

**Table 18: Net Taxable Sales**

| County   | 2003-04         | 2004-05         | 2005-06         | 2006-07         | 2007-08         | 2008-09         |
|----------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Beaufort | \$1,826,023,937 | \$2,462,825,056 | \$2,662,718,004 | \$2,751,447,656 | \$2,560,090,300 | \$2,138,324,218 |
| Colleton | \$210,859,200   | \$274,449,046   | \$298,804,080   | \$323,575,354   | \$300,324,500   | \$262,713,105   |
| Hampton  | \$78,887,543    | \$99,117,876    | \$106,201,480   | \$110,013,323   | \$91,526,640    | \$75,556,391    |
| Jasper   | \$223,509,543   | \$324,092,111   | \$385,611,912   | \$410,103,916   | \$341,968,265   | \$300,395,565   |

Source: SC Department of Revenue

## Economic Impact of Tourism

The economic impact of tourism—measured by visitor expenditures and tourism-related jobs and payroll—varies from county to county, with all four having had increases in the percent of tourism related jobs between 2006 and 2009. Each county in the Lowcountry Region with the exception of Colleton County also had their percent of sales by visitors increase between 2006 and 2009. Beaufort County, as one of the top tourism destinations in the state, receives the greatest amount of visitor spending and has the largest number of tourism-generated jobs. Colleton County, with the ACE Basin nationally recognized as an eco-tourism destination and with two Interstate-95 interchanges, ranks second for tourism expenditures and payrolls. The Lowcountry as of 2009 has seen a drop in the amount of spending by visitors and all but Jasper County have also experienced a decrease in payroll related to tourism between 2008 and 2009 however, there were no decreases in percent of sales by visitors Between 2008 and 2009. **NOTE:** 2009 is the most recent data available.

**Table 19: Economic Impact of Visitors in the Lowcountry: 2006-2009**

|                            |      | Expenditures<br>by Visitors | Total<br>Gross Taxable<br>Sales | Percent<br>of<br>Sales<br>by<br>Visitors | Payroll<br>Related<br>to<br>Tourism | Tourism<br>Employment | Total<br>Jobs | Percent<br>of<br>Jobs<br>Related<br>to<br>Tourism |
|----------------------------|------|-----------------------------|---------------------------------|--|-------------------------------------|-----------------------|---------------|---|
| <b>Beaufort<br/>County</b> |      |                             |                                 |  |                                     |                       |               |   |
|                            | 2006 | \$958,110,000               | \$3,887,259,912                 | 24.65%                                   | \$198,100,000                       | 12,800                | 61,880        | 20.69%  |
|                            | 2007 | \$1,026,320,000             | \$4,058,389,971                 | 25.29%                                   | \$211,090,000                       | 13,230                | 63,033        | 20.99%  |
|                            | 2008 | \$1,019,970,000             | \$4,004,958,326                 | 25.47%                                   | \$206,820,000                       | 12,840                | 61,886        | 20.75%  |
|                            | 2009 | \$926,500,000               | \$3,506,948,982                 | 26.42%                                   | \$197,200,000                       | 12,200                | 58,248        | 20.94%  |
| <b>Colleton<br/>County</b> |      |                             |                                 |  |                                     |                       |               |   |
|                            | 2006 | \$80,490,000                | \$619,659,163                   | 12.99%                                   | \$15,550,000                        | 1,020                 | 10,990        | 9.28%   |
|                            | 2007 | \$86,330,000                | \$657,301,391                   | 13.13%                                   | \$16,590,000                        | 1,060                 | 10,674        | 9.93%   |
|                            | 2008 | \$86,830,000                | \$689,601,888                   | 12.59%                                   | \$16,720,000                        | 1,000                 | 10,701        | 9.34%   |
|                            | 2009 | \$82,510,000                | \$643,580,390                   | 12.82%                                   | \$16,740,000                        | 999                   | 10,421        | 9.59%   |
| <b>Hampton<br/>County</b>  |      |                             |                                 |  |                                     |                       |               |   |
|                            | 2006 | \$10,800,000                | \$291,108,843                   | 3.71%                                    | \$1,950,000                         | 130                   | 5,375         | 2.42%   |
|                            | 2007 | \$11,260,000                | \$293,722,695                   | 3.83%                                    | \$2,020,000                         | 130                   | 5,407         | 2.40%   |
|                            | 2008 | \$11,540,000                | \$283,811,126                   | 4.07%                                    | \$2,050,000                         | 120                   | 5,157         | 2.33%   |
|                            | 2009 | \$10,590,000                | \$260,516,527                   | 4.07%                                    | \$1,980,000                         | 120                   | 4,919         | 2.44%   |
| <b>Jasper<br/>County</b>   |      |                             |                                 |  |                                     |                       |               |   |
|                            | 2006 | \$44,050,000                | \$886,051,537                   | 4.97%                                    | \$9,090,000                         | 610                   | 7,567         | 8.06%   |
|                            | 2007 | \$46,870,000                | \$956,839,044                   | 4.90%                                    | \$9,620,000                         | 630                   | 7,992         | 7.88%   |
|                            | 2008 | \$47,480,000                | \$939,769,745                   | 5.05%                                    | \$9,670,000                         | 610                   | 8,058         | 7.57%   |
|                            | 2009 | \$47,020,000                | \$845,973,337                   | 5.56%                                    | \$9,890,000                         | 630                   | 7,261         | 8.68%   |

Source: SCPRT, SCLMI, and SCDOR