

May

May

Contents

Population..... 3

 Total Population..... 3

 Age Distribution 4

 Race and Ethnicity..... 7

 Income 14

Economic Development..... 16

 Economic Base 16

 Overview 16

 Labor Force 19

 Bryan County..... 19

 Bulloch County..... 19

 Camden County..... 20

 Chatham County 21

 Effingham County..... 22

 Glynn County..... 23

 Liberty County..... 23

 Screven County 23

 Economic Resources 23

 Coastal Regional Commission of Georgia 24

 Economic Trends..... 25

Housing 31

 Housing Types & Mix 31

 Condition and Occupancy 33

 Cost of Housing 35

 Cost-Burdened Households 35

 Special Housing Needs 37

 Jobs-Housing Balance..... 37

Community Facilities and Services..... 39

 Water Supply and Treatment 39

 Sewerage System and Wastewater Treatment 39

 Other Facilities and Services 39

Intergovernmental Coordination	40
Transportation System.....	41
Road Network	41
Alternative Modes	41
Railroads, Trucking, Port Facilities and Airports	41
Transportation and Land Use Connection	41

APPENDIX A

Data Report Pursuant to Chapter 110-12-6-.07

Population

Total Population

From 2000 to 2010 the region’s population grew by 15%. All of the counties gained population except Screven County. Bryan, Bulloch, Effingham, Long, and McIntosh Counties all grew more than the regional average. All counties are projected to grow between the 2000 census and 2030, with a projected regional growth rate of 42%. Bryan, Bulloch, Camden, Effingham, and McIntosh Counties are projected to grow faster than the regional average. See Table 1.

Table 1 Population Growth and Projected Growth by County							
County	2000	2010	% Change 2000-2010	annualized	2020	2030	% Change 2000-2030
Bryan	23,417	30,233	23%	2.25%	45,272	59,534	61%
Bulloch	55,983	70,217	20%	2.03%	88,071	109,034	49%
Camden	43,664	50,513	14%	1.36%	70,548	96,743	55%
Chatham	232,048	265,128	12%	1.25%	290,615	324,098	28%
Effingham	37,535	52,250	28%	2.82%	80,563	112,062	67%
Glynn	67,568	79,626	15%	1.51%	93,461	109,771	38%
Liberty	61,610	63,453	3%	0.29%	78,740	93,821	34%
Long	10,304	14,464	29%	2.88%	14,386	17,171	40%
McIntosh	10,847	14,333	24%	2.43%	16,039	20,686	48%
Screven	15,374	14,593	-5%	-0.54%	17,819	20,036	23%
CRC Region	560,350	656,820	15%	1.47%	797,534	964,986	42%
Source: U. S. Census, GA Office of Planning & Budget							

In addition to looking at the population data for the Coastal Region’s counties, we also examined the population for all twelve Regional Commissions within the state. From 2000 to 2010, the Coastal Region ranked third in population and sixth in population growth. Based upon population projections by the Georgia Office of Planning & Budget, the Coastal

Region will rank 5th in population and remain at 6th in projected population growth. See Table 2.

Table 2 Population Growth and Projected Growth by Region							
Region	2000	2010	% Change 2000-2010	annualized	2020	2030	% Change 2000-2030
Coastal Georgia	558,350	654,810	15%	1.47%	795,514	962,956	42%
Northwest Georgia	697,410	873,296	20%	2.01%	1,085,667	1,348,614	48%
Georgia Mountains	455,342	646,300	30%	2.95%	867,596	1,158,531	61%
Atlanta Region	3,429,379	4,402,352	22%	2.21%	5,286,948	6,313,176	46%
Northeast Georgia	438,300	607,030	28%	2.78%	796,704	1,043,762	58%
Three Rivers	403,944	509,199	21%	2.07%	644,868	807,012	50%
Middle Georgia	440,121	489,491	10%	1.01%	560,713	635,838	31%
Central Savannah River	419,634	450,292	7%	0.68%	515,785	582,973	28%
River Valley	353,274	365,648	3%	0.34%	418,200	471,121	25%
Heart of GA Altamaha	272,894	299,874	9%	0.90%	337,026	375,230	27%
Southwest Georgia	341,910	364,697	6%	0.62%	409,456	455,882	25%
Southern Georgia	173,780	187,717	7%	0.74%	215,873	245,033	29%
Georgia	7,984,338	9,850,706	19%	1.89%	11,934,350	14,400,128	45%
CRC Ranking	3	3	6	6	5	5	6

Source: U. S. Census, GA Office of Planning & Budget

Age Distribution

In the Regional Assessment, we looked at two vulnerable populations, the very young (under 5) and the elderly (65 and over) in our discussion of Resiliency. The following data demonstrates the shift in ages by county and by the region as a whole.

From 2000 to 2010, the regional average of the median age changed by 2.6 years from 31.8 years old to 34.4 years old, an 8% increase. Not all counties shifted in the same direction however; Bulloch and Chatham Counties now have lower median ages by nearly 1%, while the median ages in Camden, Liberty, Long, and McIntosh Counties were moving higher than the 8% average for the region. McIntosh County now has the highest median age in the region, 44.4 years old, representing an increase of 20%. See Table 3 below.

County	Median Age 2000	Median Age 2010	Change	Percent Change
Bryan	33.3	35.7	2.4	7.21%
Bulloch	26.1	25.9	-0.2	-0.77%
<i>Camden</i>	28.2	31.3	3.1	10.99%
Chatham	34.4	34	-0.4	-1.16%
Effingham	33.6	35.1	1.5	4.46%
Glynn	37.9	39.4	1.5	3.96%
<i>Liberty</i>	25	27.9	2.9	11.60%
<i>Long</i>	26.5	30.6	4.1	15.47%
<i>McIntosh</i>	37	44.4	7.4	20.00%
<i>Screven</i>	36.2	39.5	3.3	9.12%
Regional Average	31.8	34.4	2.6	8.05%

Source: U. S. Census and CRC

In addition to changes in the median age, the adult population (ages 18+) has grown by 85,500, nearly 21%, in the region from 2000 to 2010. Several counties grew at a much faster rate, with Effingham, Long, and McIntosh Counties all gaining more than 40% in adult population during the decade. Only Screven County saw its adult population drop. See Table 4 below.

County	Ages 18+ 2000	Ages 18+ 2010	Change	Percent Change
<i>Bryan</i>	16,128	21,376	5,248	32.54%
<i>Bulloch</i>	43,503	55,824	12,321	28.32%
<i>Camden</i>	29,832	36,861	7,029	23.56%
Chatham	173,965	205,121	31,156	17.91%
<i>Effingham</i>	26,301	37,344	11,043	41.99%
Glynn	50,460	60,395	9,935	19.69%
<i>Liberty</i>	41,916	44,262	2,346	5.60%
<i>Long</i>	6,893	10,045	3,152	45.73%
<i>McIntosh</i>	7,805	11,255	3,450	44.20%
<i>Screven</i>	11,083	10,903	-180	-1.62%
Regional Total	407,886	493,386	85,500	20.96%

Source: U. S. Census and CRC

Nationally, one of the fastest growing populations is the group known as the Baby Boomers. These are people born between 1945 and 1964. This group reached age 65 just in time for the 2010 census. Reported below is the change in population for ages 65 and older. Regionally this age cohort grew by 14,758, just over 25%. In some counties, notably Camden and McIntosh, the 65+ population doubled. Bryan, Effingham, Liberty, and Long Counties all show very robust growth in the 65+ population. See Table 5 below.

Table 5				
Shift in Population Ages 65+ - 2000 to 2010				
County	Ages 65+ 2000	Ages 65+ 2010	Change	Percent Change
<i>Bryan</i>	1,703	2,715	1,012	59.42%
Bulloch	5,207	6,401	1,194	22.93%
<i>Camden</i>	2,277	4,556	2,279	100.09%
Chatham	29,770	32,864	3,094	10.39%
<i>Effingham</i>	3,016	4,763	1,747	57.92%
Glynn	9,761	11,976	2,215	22.69%
<i>Liberty</i>	2,432	3,971	1,539	63.28%
<i>Long</i>	594	1,055	461	77.61%
<i>McIntosh</i>	1,280	2,478	1,198	93.59%
Screven	2,155	2,174	19	0.88%
Regional Total	58,195	72,953	14,758	25.36%
Source: U. S. Census and CRC				

Race and Ethnicity

Examining the region as a whole, the racial and ethnic composition has remained very similar between 2000 and 2010 when looking at race or ethnicity as a percentage of the whole population. The percentage of the population reporting as “One race,” “White,” or “Black or African-American” have decreased by approximately one percent, while the percentage of the population reporting as “Some other race” or “Two or more races” has gone up by a similar amount. The most significant increase is the percentage of the population reporting as “Hispanic or Latino” which has grown by 2.37% from 3.08% to 5.45% of the regional population. When you look at the actual numerical growth of some populations, the percentage seems much more dramatic. For example the number of Asians has grown by 65%, Native Hawaiian and other Pacific Islanders has grown by 77%, and Hispanics or Latinos has grown by 108%. However, these groups, even when combined, represent less than 10% of the total population. See Table 6 below.

**Table 6
Trends in Race and Ethnicity 2000 to 2010**

Coastal Region	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent Change
Total Population	558,350	100.00%	654,810	100.00%	96,460	17%
One race	550,240	98.55%	639,459	97.66%	89,219	16%
White	349,086	62.52%	401,724	61.35%	52,638	15%
Black or African American	184,767	33.09%	209,579	32.01%	24,812	13%
American Indian and Alaska Native	1,698	0.30%	2,167	0.33%	469	28%
Asian	6,887	1.23%	11,353	1.73%	4,466	65%
Native Hawaiian and Other Pacific Islander	564	0.10%	999	0.15%	435	77%
Some other race	7,238	1.30%	13,637	2.08%	6,399	88%
Two or more races	8,110	1.45%	15,351	2.34%	7,241	89%
Total Population	558,350	100.00%	654,810	100.00%	96,460	17%
Hispanic or Latino (of any race)	17,193	3.08%	35,706	5.45%	18,513	108%
Not Hispanic or Latino	541,157	96.92%	619,104	94.55%	77,947	14%
Source: U. S. Census and CRC						

When we compare the Coastal Georgia region to the United States and to the State of Georgia, we find that the region has a significantly higher percentage of Blacks or African-Americans than the country as a whole and a slightly higher percentage than the state. The region’s Asian and Hispanic or Latino populations are significantly lower than the country or the state.

- Black or African-American – United States (12.6%), Georgia (30.7%), Coastal Georgia (32.01%);
- Hispanic or Latino – United State (16.6%), Georgia (8.9%), Coastal Georgia (5.45%); and
- Asian – United States (4.9%), Georgia (3.4%), Coastal Georgia (1.73%).

The Race and Ethnicity data for the ten counties with the Coastal Region is reported below. Much like the region as a whole the shifts in demographics have been subtle and incremental. See Tables 7.1 through 7.10 below. The top three counties for representative minority populations are:

- Black or African American – Screven (43.29%), Liberty (42.24%), and Chatham (40.13%);
- Hispanic or Latino – Long (12.29%), Liberty (9.71%), and Glynn (6.44%); and
- Asian – Chatham (2.38%), Liberty (1.97%), and Bryan (1.61%).

Table 7.1 Bryan County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	23,417	100.00%	30,233	100.00%	6,816	29%
One race	23,103	98.66%	29,475	97.49%	6,372	28%
White	19,386	82.79%	24,254	80.22%	4,868	25%
Black or African American	3,311	14.14%	4,286	14.18%	975	29%
American Indian and Alaska Native	74	0.32%	98	0.32%	24	32%
Asian	181	0.77%	486	1.61%	305	169%
Native Hawaiian and Other Pacific Islander	16	0.07%	25	0.08%	9	56%
Some other race	135	0.58%	326	1.08%	191	141%
Two or more races	314	1.34%	758	2.51%	444	141%
Total Population	23,417	100.00%	30,233	100.00%	6,816	29%
Hispanic or Latino (of any race)	465	1.99%	1,336	4.42%	871	187%
Not Hispanic or Latino	22,952	98.01%	28,897	95.58%	5,945	26%

Source: U. S. Census and CRC

Table 7.2 Bulloch County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	55,983	100.00%	70,217	100.00%	14,234	25%
One race	55,555	99.24%	69,056	98.35%	13,501	24%
White	38,460	68.70%	47,215	67.24%	8,755	23%
Black or African American	16,101	28.76%	19,409	27.64%	3,308	21%
American Indian and Alaska Native	72	0.13%	183	0.26%	111	154%
Asian	461	0.82%	1,020	1.45%	559	121%
Native Hawaiian and Other Pacific Islander	15	0.03%	64	0.09%	49	327%
Some other race	446	0.80%	1,165	1.66%	719	161%
Two or more races	428	0.76%	1,161	1.65%	733	171%
Total Population	55,983	100.00%	70,217	100.00%	14,234	25%
Hispanic or Latino (of any race)	1,052	1.88%	2,439	3.47%	1,387	132%
Not Hispanic or Latino	54,931	98.12%	67,778	96.53%	12,847	23%
Source: U. S. Census and CRC						

Table 7.3 Camden County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	43,664	100.00%	50,513	100.00%	6,849	16%
One race	42,841	98.12%	48,982	96.97%	6,141	14%
White	32,765	75.04%	37,557	74.35%	4,792	15%
Black or African American	8,783	20.11%	9,799	19.40%	1,016	12%
American Indian and Alaska Native	216	0.49%	259	0.51%	43	20%
Asian	441	1.01%	724	1.43%	283	64%
Native Hawaiian and Other Pacific Islander	37	0.08%	76	0.15%	39	105%
Some other race	599	1.37%	567	1.12%	-32	-5%
Two or more races	823	1.88%	1,531	3.03%	708	86%
Total Population	43,664	100.00%	50,513	100.00%	6,849	16%
Hispanic or Latino (of any race)	1,585	3.63%	2,590	5.13%	1,005	63%
Not Hispanic or Latino	42,079	96.37%	47,923	94.87%	5,844	14%
Source: U. S. Census and CRC						

Table 7.4 Chatham County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	232,048	100.00%	265,128	100.00%	33,080	14%
One race	229,067	98.72%	259,429	97.85%	30,362	13%
White	128,279	55.28%	140,010	52.81%	11,731	9%
Black or African American	93,971	40.50%	106,392	40.13%	12,421	13%
American Indian and Alaska Native	580	0.25%	691	0.26%	111	19%
Asian	4,013	1.73%	6,311	2.38%	2,298	57%
Native Hawaiian and Other Pacific Islander	151	0.07%	254	0.10%	103	68%
Some other race	2,073	0.89%	5,771	2.18%	3,698	178%
Two or more races	2,981	1.28%	5,699	2.15%	2,718	91%
Total Population	232,048	100.00%	265,128	100.00%	33,080	14%
Hispanic or Latino (of any race)	5,403	2.33%	14,370	5.42%	8,967	166%
Not Hispanic or Latino	226,645	97.67%	250,758	94.58%	24,113	11%
Source: U. S. Census and CRC						

Table 7.5 Effingham County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	37,535	100.00%	52,250	100.00%	14,715	39%
One race	37,145	98.96%	51,270	98.12%	14,125	38%
White	31,776	84.66%	43,182	82.64%	11,406	36%
Black or African American	4,876	12.99%	7,048	13.49%	2,172	45%
American Indian and Alaska Native	119	0.32%	156	0.30%	37	31%
Asian	170	0.45%	427	0.82%	257	151%
Native Hawaiian and Other Pacific Islander	9	0.02%	26	0.05%	17	189%
Some other race	195	0.52%	431	0.82%	236	121%
Two or more races	390	1.04%	980	1.88%	590	151%
Total Population	37,535	100.00%	52,250	100.00%	14,715	39%
Hispanic or Latino (of any race)	531	1.41%	1,501	2.87%	970	183%
Not Hispanic or Latino	37,004	98.59%	50,749	97.13%	13,745	37%
Source: U. S. Census and CRC						

Table 7.6 Glynn County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	67,568	100.00%	79,626	100.00%	12,058	18%
One race	66,832	98.91%	78,196	98.20%	11,364	17%
White	47,746	70.66%	53,823	67.59%	6,077	13%
Black or African American	17,874	26.45%	20,726	26.03%	2,852	16%
American Indian and Alaska Native	177	0.26%	232	0.29%	55	31%
Asian	408	0.60%	921	1.16%	513	126%
Native Hawaiian and Other Pacific Islander	32	0.05%	95	0.12%	63	197%
Some other race	595	0.88%	2,399	3.01%	1,804	303%
Two or more races	736	1.09%	1,430	1.80%	694	94%
Total Population	67,568	100.00%	79,626	100.00%	12,058	18%
Hispanic or Latino (of any race)	2,019	2.99%	5,126	6.44%	3,107	154%
Not Hispanic or Latino	65,549	97.01%	74,500	93.56%	8,951	14%
Source: U. S. Census and CRC						

Table 7.7 Liberty County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	61,610	100.00%	63,453	100.00%	1,843	3%
One race	59,535	96.63%	60,493	95.34%	958	2%
White	28,737	46.64%	29,881	47.09%	1,144	4%
Black or African American	26,396	42.84%	26,805	42.24%	409	2%
American Indian and Alaska Native	322	0.52%	358	0.56%	36	11%
Asian	1,082	1.76%	1,247	1.97%	165	15%
Native Hawaiian and Other Pacific Islander	266	0.43%	392	0.62%	126	47%
Some other race	2,732	4.43%	1,810	2.85%	-922	-34%
Two or more races	2,075	3.37%	2,960	4.66%	885	43%
Total Population	61,610	100.00%	63,453	100.00%	1,843	3%
Hispanic or Latino (of any race)	5,022	8.15%	6,159	9.71%	1,137	23%
Not Hispanic or Latino	56,588	91.85%	57,294	90.29%	706	1%
Source: U. S. Census and CRC						

Table 7.8 Long County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	10,304	100.00%	14,464	100.00%	4,160	40%
One race	10,111	98.13%	13,974	96.61%	3,863	38%
White	7,049	68.41%	9,026	62.40%	1,977	28%
Black or African American	2,499	24.25%	3,647	25.21%	1,148	46%
American Indian and Alaska Native	75	0.73%	91	0.63%	16	21%
Asian	59	0.57%	115	0.80%	56	95%
Native Hawaiian and Other Pacific Islander	26	0.25%	56	0.39%	30	115%
Some other race	403	3.91%	1,039	7.18%	636	158%
Two or more races	193	1.87%	490	3.39%	297	154%
Total Population	10,304	100.00%	14,464	100.00%	4,160	40%
Hispanic or Latino (of any race)	870	8.44%	1,778	12.29%	908	104%
Not Hispanic or Latino	9,434	91.56%	12,686	87.71%	3,252	34%
Source: U. S. Census and CRC						

Table 7.9 McIntosh County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	10,847	100.00%	14,333	100.00%	3,486	32%
One race	10,753	99.13%	14,156	98.77%	3,403	32%
White	6,654	61.34%	8,811	61.47%	2,157	32%
Black or African American	3,993	36.81%	5,149	35.92%	1,156	29%
American Indian and Alaska Native	41	0.38%	53	0.37%	12	29%
Asian	32	0.30%	45	0.31%	13	41%
Native Hawaiian and Other Pacific Islander	4	0.04%	10	0.07%	6	150%
Some other race	29	0.27%	88	0.61%	59	203%
Two or more races	94	0.87%	177	1.23%	83	88%
Total Population	10,847	100.00%	14,333	100.00%	3,486	32%
Hispanic or Latino (of any race)	99	0.91%	227	1.58%	128	129%
Not Hispanic or Latino	10,748	99.09%	14,106	98.42%	3,358	31%
Source: U. S. Census and CRC						

Table 7.10 Screven County	2000	Percent Total Population	2010	Percent Total Population	Numerical Change	Percent
Total Population	15,374	100.00%	14,593	100.00%	-781	-5%
One race	15,298	99.51%	14,428	98.87%	-870	-6%
White	8,234	53.56%	7,965	54.58%	-269	-3%
Black or African American	6,963	45.29%	6,318	43.29%	-645	-9%
American Indian and Alaska Native	22	0.14%	46	0.32%	24	109%
Asian	40	0.26%	57	0.39%	17	43%
Native Hawaiian and Other Pacific Islander	8	0.05%	1	0.01%	-7	-88%
Some other race	31	0.20%	41	0.28%	10	32%
Two or more races	76	0.49%	165	1.13%	89	117%
	15,374	100.00%	14,593	100.00%		
Total Population	15,374	100.00%	14,593	100.00%	-781	-5%
Hispanic or Latino (of any race)	147	0.96%	180	1.23%	33	22%
Not Hispanic or Latino	15,227	99.04%	14,413	98.77%	-814	-5%
Source: U. S. Census and CRC						

Income

This section evaluates income levels, income distribution and poverty levels in the region and compares them to the State of Georgia and national data. The poverty rate for families in Coastal Georgia ranges from a low of 7.9% in Effingham County to a high of 21% in Screven County. The poverty rate for persons in Coastal Georgia ranges from a low of 11.2% in Effingham County to a high of 31.3% in Bulloch County. The poverty rate for persons in the State of Georgia is 18.2% and in the United States it is 15.4%. Bulloch, Chatham, Glynn, Liberty, Long, and Screven Counties all have a poverty rate higher than the State of Georgia. Additionally, Camden County has a poverty rate higher than the national rate. Only Bryan, Effingham, and McIntosh Counties have poverty rates lower than both the state and national rates. See Table 8 below.

Table 8		
Poverty Rate for Families and Persons by County		
County	Families	Persons
Bryan	8.60%	11.70%
Bulloch	16.30%	31.30%
Camden	13.70%	15.50%
Chatham	13.50%	19.10%
Effingham	7.90%	11.20%
Glynn	15.30%	19.20%
Liberty	15.60%	18.70%
Long	17.00%	19.20%
McIntosh	10.50%	14.90%
Screven	21.00%	27.00%
CRC Average	19.94%	18.78%
State of Georgia		18.20%
United States		15.40%
Source: American Community Survey 2013 - Economic Characteristics		

Median Family Income (MFI) is that mid-point where half of family incomes are higher and half of family incomes are lower than that particular figure. Many social programs, especially state and federal housing and community development programs use the figure for median income for a family of four as the starting point to establish income limits that qualify families for various types of assistance based upon need. These figures are adjusted

upward and downward depending on family size. The U. S. Department of Housing and Urban Development (HUD) publishes tables on an annual basis listing the MFI for every Metropolitan Statistical Area (MSA), HUD Metro Fair Market Rent Area (HMFA), and rural county by state. These tables also show the Low- and Moderate-Income (LMI) thresholds for each area, along with calculations for Very-Low Income (VLI) and Extremely-Low Income (ELI); with low-income being 80% of MFI, very-low income being 50% of MFI and extremely-low income being 30% of MFI.

MFI ranges from \$48,700 in Liberty County to \$65,400 in Camden County. By comparison, MFI for the State of Georgia is \$58,755 and for the United States it is \$64,719. See Table 9 below.

Table 9			
Median Family Income			
MSA, HMFA, or Rural	County	MFI	L/M Threshold
Savannah, GA MSA	Bryan	\$61,300	\$49,040
Savannah, GA MSA	Chatham	\$61,300	\$49,040
Savannah, GA MSA	Effingham	\$61,300	\$49,040
Brunswick, GA MSA	Glynn	\$55,300	\$44,240
Brunswick, GA MSA	McIntosh	\$55,300	\$44,240
Hinesville-Ft. Stewart, GA HMFA	Liberty	\$48,700	\$38,960
Long County, GA HMFA	Long	\$51,000	\$40,800
Rural	Bulloch	\$51,700	\$41,360
Rural	Camden	\$65,400	\$52,320
Rural	Screven	\$50,900	\$40,720
Source: huduser.org and U.S. Census			

Economic Development

The Coastal Regional Commission serves as the regional planning agency for the ten counties in Coastal Georgia: Bryan County, Bulloch County, Camden County, Chatham County, Effingham County, Glynn County, Liberty County, Long County, McIntosh County, and Screven County. These counties are bound together as a region by their geography, their key manufacturing sectors, two major ports, a robust transportation network, a significant military presence, and most importantly – a regional commitment to economic development.

We have identified the following trends and issues relating to the economic characteristics of the region, including the region's *economic base*, its *labor force*, regional *economic resources*, and ongoing *economic trends* within the region.

Economic Base

Overview

Through the Coastal Regional Commission's empirical observations, the Aerospace Product and Parts Manufacturing Sector (NAICS Code 3364) is an extremely strong sector of the regional economy and one with great potential for continued growth. Quantitative data is difficult to obtain for this sector making the Location Quotient non-reportable; however, Gulfstream Aerospace alone employs 65% of the Manufacturing Sector of the Chatham County economy. Gulfstream Aerospace and Stambaugh Aviation both have a significant presence in Brunswick, GA located in Glynn County towards the southern end of the region.

Coastal Georgia has the good fortune to have a diversified economy that provides economic resilience should there be a downturn in one particular sector of the economy. We are strong in non-manufacturing sectors of the economy, particularly Tourism and Hospitality, Higher Education, and Healthcare. The film and studio production industry has just established a significant presence in Effingham County. The Georgia Ports Authority operates the Port of Savannah and the Port of Brunswick. The Port of Savannah is the second busiest port on the Eastern Seaboard and is the largest single container terminal in

North America. The Port of Brunswick is the largest automobile facility in North America. Strategically located with easy connectivity to air, ground, and rail transportation, Coastal Georgia can provide the logistics for getting goods to and from the global market; with the development of the Georgia Spaceport on the horizon in Camden County, the old saying “the sky’s the limit” may no longer apply to Coastal Georgia.

Coastal Georgia understands a manufacturing economy is a strong economy. While we are strategically growing our aerospace industry and preparing for a strong tomorrow, we have solid fundamentals for today’s economy. We meet or exceed the thresholds for top-third ranked location quotients in several sectors across the region; including Sugar and Confectionery, Petroleum and Coal, Cement and Concrete, and Lime and Gypsum in Chatham County, Cement and Concrete in Effingham County, and Nonmetallic Mineral Product Manufacturing in Bryan, Bulloch, Chatham, Effingham, and Liberty Counties. See Table 10 below.

Table 10					
Top-Third Ranked Manufacturing Industries in Coastal Georgia					
NAICS Code	NAICS Title	Jurisdiction	Location Quotient	Establishment LQ Cutoff	Difference
3113	Sugar and Confectionary	Chatham County	6.23	1.30	4.93
3241	Petroleum and Coal	Chatham County	1.83	1.32	0.51
3273	Cement and Concrete	Chatham County	1.56	1.38	0.18
3274	Lime and Gypsum	Chatham County	9.35	1.26	8.09
3273	Cement and Concrete	Effingham County	8.10	1.38	6.72
327	Nonmetallic Mineral Product Manufacturing	Bryan	2.36	n/a	n/a
327	Nonmetallic Mineral Product Manufacturing	Bulloch	4.41	n/a	n/a
327	Nonmetallic Mineral Product Manufacturing	Chatham	1.17	n/a	n/a
327	Nonmetallic Mineral Product Manufacturing	Effingham	3.64	n/a	n/a
327	Nonmetallic Mineral Product Manufacturing	Liberty	2.79	n/a	n/a

Source: Bureau of Labor Statistics

Although small businesses and family owned concerns are found throughout the manufacturing sector in Coastal Georgia, we are also home to 39 companies with 100 employees or more, three of these employ 1,000 or more, and Gulfstream Aerospace is the

clear industry leader with more than 15,000 employees, a workforce greater than the entire population of some of our rural counties. See Table 11 below.

Table 11				
Major Manufacturing Employers in Coastal Georgia				
Location	Employer	NAICS Code	NAICS Title	Employees
Bryan County	Daniel Defense	332994	Small arms	250
	Hobart Corporation	333241	Food product machinery	113
	Oracal USA	326113	Unlaminated plastics	128
Bulloch County	Briggs & Stratton	333618	Lawnmower engines	550
	Viracon Georgia	327211	Flat glass	402
	VF Jeanswear	315240	Women's apparel	400
Camden County	Lockheed Martin	334511	Search & nav. Equip	531
	MeadWestvaco	322130	Paperboard	234
Chatham County	Arizona Chemical	324110	Petroleum	133
	Ash Shipping	311340	Confectionery	200
	Building Materials Corp.	321219	Reconstituted wood	150
	EMD Millipore	325180	Inorganic chemicals	180
	GE Aviation	488190	Aviation support	150
	GA Dept. of Def.	488119	Airport operations	200
	Georgia Pacific	327420	Gypsum products	150
	Great Dane	336212	Truck trailer manuf.	1,000
	Gulfstream Aerospace	336411	Aircraft manufacturing	15,657
	Honeywell International	334511	Search & nav. Equip.	543
	Imperial Savannah	311314	Cane sugar refining	125
	International Paper	322121	Paper mills	637
	Lummus Corp.	333517	Machine tool manuf.	160
	Netjets International	481219	Non-sched. Air trans.	665
	Owens Corning	327993	Mineral wool	140
	Peter Brasseler	339114	Dental equipment	225
	Rocktegn	322130	Paperboard	520
	Roger Wood Foods	311612	Meat processing	250
	Standard Concrete	327390	Concrete products	100
	Talaria	336612	Boatbuilding	154
Effingham County	EFACEC Group	334111	Elec. Computer manuf.	105
	Georgia Pacific	322121	Paper mills	1,500
	Southern Sample	327120	Structural clay	134
Glynn County	Brunswick Cellulose	322110	Pulp mills	650
	Georgia Pacific	327420	Gypsum products	292
	Jered LLC	335314	Relays & Ind. Controls	100
	Rich Products Corp.	311710	Seafood product	301
Liberty County	Coca-Cola	312111	Soft drink manuf.	116
	International Greetings	322220	Paper bag products	170
Screven County	King American	313210	Broadwoven fabrics	390
	Koyo Bearings	332991	Ball and roller bearings	320

Source: Georgia Department of Economic Development

Labor Force

The following section discusses the region's labor force by county, including employment status, occupations, leading industries, personal income, wages, and commuting patterns.

Bryan County

Bryan County has 30 businesses participating in the manufacturing industries. Major employers include Daniel Defense, a small arms manufacturer (149 employees), Hobart Corporation, a manufacturer of food product machinery (113 employees), and Oracal USA a manufacturer of unlaminated plastic products (128 employees).

Bryan County has a labor force of 15,816, of these 14,880 are employed with an effective unemployment rate of 5.9% as of December 2013. There are 4,439 workers employed in industry, 2,111 employed by the major employers within the county; and the county's most significant industry by Location Quotient (LQ) is nonmetallic mineral product manufacturing with a 2.36 LQ.

Bulloch County

Bulloch County has nearly 100 businesses participating in the manufacturing industries. These include six corporations in the Nonmetallic Mineral Product Manufacturing sector, three corporations in avionics and aviation operations, and two corporations that manufacture engines or transmissions. Major employers include Briggs & Stratton (550 employees), Viracon Georgia, Inc. (402 employees), and VF Jeanswear (400 employees).

In Statesboro, the county seat of Bulloch County, Georgia Southern University has created City Campus a joint city and university facility in downtown Statesboro developed to serve as a catalyst for regional economic development. The mission of the City Campus is to increase the economic competitiveness of southeast Georgia by offering programs that lead to new businesses being formed and jobs being created.

City Campus sponsors three programs:

- The Bureau of Business Research & Economic Development (BBRED) – the economic outreach arm of the College of Business Administration (COBA) at Georgia Southern conducting applied research on community and business development in Statesboro and the region of southeast Georgia;
- The Center for Entrepreneurial Learning and Leadership (CELL) – a center for entrepreneurship that “seeks to contribute to the economic and social well-being of Statesboro and surrounding counties through entrepreneurship education and venture creation;” and
- Georgia’s Enterprise Network for Innovation Entrepreneurship (GENIE) – a virtual incubator linking businesses in economically challenged counties in rural Georgia to the resources available through COBA whose major goal is to create and/or retain jobs in Georgia through mentoring, connecting, and training programs.

Camden County

Camden County has nearly 50 businesses participating in the manufacturing industries. These include companies engaged in millwork, boatbuilding and repair, shipbuilding and repair, industrial machinery, construction machinery, aviation manufacturing, aviation operations, search, detection, navigation, guidance, and aeronautics manufacturing, and guided missile and space vehicle manufacturing. Major employers include Lockheed Martin (531 employees) and MeadWestvaco Corporation (234 employees). Camden County is home to the only Navy base in Georgia (NSB Kings Bay), the homeport to East Coast Trident Submarine Fleet. Camden County is actively pursuing another component of the aerospace industry by seeking an Opportunity Zone designation from the Georgia Department of Community Affairs (DCA) to develop an 11,800 acre site as the Georgia Spaceport. Successful development of this site, the influx of cutting edge technology, and the demand for a highly skilled workforce, will compliment Gulfstream’s long history in the region and provide regional economic growth.

Chatham County

Chatham County has nearly 500 businesses in a very diverse manufacturing sector.

Representative industries include aircraft manufacturing, air transportation support, airport operations, aviation and aeronautics, boatbuilding and repairing, candy and confectionery, cane sugar refining, cement and cement products, concrete products, dental equipment and supplies, gypsum products, industrial inorganic chemicals, machine tool manufacturing, mineral wool, nonscheduled air transportation, paper mills, paperboard mills, petroleum refineries, reconstituted wood products, sausages and other prepared meats, search and navigation equipment, and truck trailer manufacturing.

Major employers in Chatham County include Arizona Chemical Company (133 employees), Ash Shipping (200 employees), Building Materials Corporation of America (150 employees), EMD Millipore Corporation (180 employees), GE Aviation Systems (150 employees), Georgia Department of Defense (200 employees), Georgia-Pacific (150 employees), Great Dane (1,000 employees), Gulfstream Aerospace Corporation (15,657 employees), Honeywell International (543 employees), Imperial Savannah (125 employees), International Paper Company (637 employees), Lummus Corporation (160 employees), Netjets International, Inc. (665 employees), Owens Corning (140 employees), Peter Brasseler Holdings (225 employees), Rocktenn (520 employees), Roger Wood Foods, Inc. (250 employees), Standard Concrete Products (100 employees), and The Talaria Company (154 employees).

The Savannah area, located in coastal Chatham County, Georgia, boasts a flourishing economy balanced on a strong foundation that includes a thriving port, increasing tourism, a stabilizing manufacturing sector and significant military presence. We are proud of our major employers, and the numbers speak for themselves – Manufacturing Employers have a workforce of 14,406. Although the total numbers for the Aerospace Product and Parts Manufacturing Sector are not disclosed making it difficult to compute the Location Quotient for this sector of the economy, Gulfstream Aerospace alone employs 65% of the Manufacturing Sector of the Chatham County economy.

Other significant manufacturing industries for which Location Quotient data are available in Chatham County are Sugar and Confectionery (LQ 6.23), Petroleum and Coal (LQ 1.83), Basic Chemical (LQ 2.88), Cement and Concrete (LQ 1.56), and Lime and Gypsum (LQ 9.35).

We are also home to the Georgia Port Authority-Port of Savannah, the largest single container terminal in North America with over four million square feet of warehouse space, immediate access to two major interstates, 9,700 feet of contiguous berth space, a four-hour drive to major markets: Atlanta, Orlando and Charlotte, and the largest concentration of import distribution centers on the East Coast. The Savannah/Chatham metro area is the hub of an 11-county labor draw area with a population of over 700,000 and a labor pool of nearly 350,000.

Effingham County

Traditional industry is still a major presence in Effingham County with the Georgia Pacific paper mill (1,500 employees) being the largest employer; however, new technologies including aircraft parts and equipment and electronic computers are being developed. The largest manufacturing employers in Effingham County are EFACEC Group (105 employees), Georgia Pacific (1,500 employees), and Southern Sample Company (134 employees).

The Effingham County Industrial Park became the site of EFACEC Group, a Portuguese-based transformer manufacturer for their North and Central America operations. The U.S. factory is located in Rincon, GA and produces both core and shell technology power transformers. Its first plant and the only one of its kind in the U.S. EFACEC Group, one of the world's leading manufacturers of power substations, is investing \$130 million in the new facility and will create up to 700 jobs.

According to research from the Georgia Department of Economic Development (GDEcD), EFACEC's Effingham County facility could generate more than 1,500 direct and indirect jobs in the region by 2017.

Glynn County

Glynn County has a diverse manufacturing base with a strong presence in aviation and related services, fresh or frozen packaged fish, paper products, and relays and industrial controls. Major manufacturing employers include Brunswick Cellulose, Inc. (650 employees), Georgia Pacific (292 employees), Jered LLC (100 employees), and Rich Products Corporation (301 employees).

Liberty County

Liberty County's top manufacturing employers include Coca-Cola (116 employees) and International Greetings USA, Inc. (170 employees).

Screven County

Screven County's two largest manufacturing employers are King American Finishing, a fabric mill with 390 employees and Koyo Bearings USA whose 320 employees produce ball and roller bearings. Screven County's economy is represented by a diverse mix of manufacturing, machining, and food processing. Equally as important as diversity is longevity of success. Many of our businesses boast record performances dating back a quarter century, some more than 50 years. Faced with the high-pressure demands of a global market Screven's long-standing industry has capitalized on new opportunities, relying on a nimble can-do workforce, supportive community leadership and great location advantages. In fact, the long-term prosperity of Screven operations is actually only natural: For today's industry, it's all about quality and speed to market, and those have always been Screven's strengths.

Economic Resources

Evaluate the development agencies, programs, tools, education, training and other economic resources available to the region's businesses and residents.

Coastal Regional Commission of Georgia

The Coastal Regional Commission facilitates a monthly council meeting with all of the cities, counties, and development authorities listed below. Each jurisdiction is represented by elected and non-elected officials and prescribed by Georgia law. In addition to the monthly council meetings, the commission's staff works in close collaboration with each jurisdiction to meet their economic development needs, to explore and develop funding opportunities, and to provide regional comprehensive planning. Beginning in July 2014, the Coastal Regional Commission will conduct regional manufacturing round tables to encourage dialogue and best practices.

Bryan County: Pembroke, Richmond Hill, and the Development Authority of Bryan County.

Bulloch County: Brooklet, Portal, Register, Statesboro, and the Development Authority of Bulloch County and Chamber of Commerce.

Camden County: Kingsland, St. Marys, Woodbine, the Chamber of Commerce, and the Joint Development Authority.

Chatham County: Bloomingdale, Garden City, Pooler, Port Wentworth, Savannah, Thunderbolt, Tybee Island, Vernonburg, the Savannah Economic Development Authority, and the Chamber of Commerce.

Effingham County: Guyton, Rincon, Springfield, and the Chamber of Commerce and Development Authority.

Glynn County: Brunswick, the County Development Authority, and the Chamber of Commerce.

Liberty County: Allenhurst, Flemington, Gumbranch, Hinesville, Midway, Riceboro, Walthourville, the Industrial Authority, and the Chamber of Commerce.

Long County: Ludowici, the County Development Authority, and the Chamber of Commerce.

McIntosh County: Darien, the County Development Authority, and the Chamber of Commerce.

Screven County: Hiltonia, Newington, Oliver, Rocky Ford, Sylvania, the Industrial Development Authority, and the Chamber of Commerce.

Higher Education: Altamaha Technical college, Armstrong Atlantic State University, Coastal College of Georgia, Georgia Southern University, Georgia Technical Aviation Program, Ogeechee Technical College, Savannah College of Art & Design, Savannah State University, and Savannah Technical College.

Economic Trends

The two projects with the greatest potential for economic impact in the region are the Savannah Harbor Expansion Project (SHEP) and the development of Spaceport Camden.

With SHEP, the Port of Savannah, operated by the Georgia Port Authority, will be able to accommodate the newer vessels being made possible by the Panama Canal expansion. These ships will be longer, have broader beams, and deeper drafts than those previously visiting the port. This will lead to an exponential increase in the tonnage arriving and departing from the port. Port expansion will create a ripple effect throughout the region in the areas of freight logistics, storage, and distribution; there will also be subsequent demands on infrastructure, including rail, highway, water, and power.

The Camden Spaceport represents a truly 21st Century realm of economic development. Although private space operations currently exist, at this point in time, private corporations must share site space and launch times with government facilities. Spaceport will be an exclusively private commercial operation and will have significant impact on the economy of Coastal Georgia and North Florida as it is developed over the next several years.

The Comprehensive Economic Development Strategy (CEDS) document submitted to EDA by the Coastal Regional Commission in 2012 identifies economic development projects throughout the region.

The following is a synopsis of information on potential projects.

Regional Projects

- Continuation of a Coastal Georgia Economic Development forum to identify and engage in projects of regional collaboration and to serve as a liaison to State legislators in Atlanta.
- Promote coordination of business retention and expansion programs for existing industries in cooperation with respective county economic development organizations and the GA Department of Economic Development.
- Identify and promote the opportunities to gain access to capital that will leverage private investments and create sustained employment.

Bryan County

- New interchange on I-95 and Belfast Keller Road and Belfast Commerce Centre Industrial Park.
- Phase II development of Interstate Centre industrial park.
- Fully developed industrial parks on I-16 and I-95.

Bulloch County

- The Development Authority of Bulloch County owns approximately 200 acres at the Interstate 16/Highway 301 interchange, most likely to be the focus of industrial development. Bulloch County is working towards master planning of the larger interchange area.
- Gateway Regional Industrial Park- Phase II of the park includes an additional 160 acres for development.

Camden County

- Development of a countywide implementation strategy addressing specific economic development actions for each city.
- Implement recommendations from the Camden County Economic Diversification study.
- Acquisition of 100 acres of land for development of a business park and installation of infrastructure with 200,000 square foot speculative building with the ability to expand.
- Infrastructure for Kingsland Commerce Park industrial site to include a water tank for fire flow.
- Design and construction of expanded rail access to connect Kingsland with CSX mainline north of Folkston in Charlton County.

Chatham County

- Improvements necessary to help locate an industry on the megasite.
- Identification and development of more industrial sites.
- Port deepening in Savannah Harbor.
- Improvements necessary to attract more aerospace and advanced manufacturing opportunities.
- Develop the Savannah region as a center for materials research and development and build on capabilities including SCAD's industrial design program and HERTY Advanced Materials Development Center.

Effingham County

- Interstate 16 Industrial Tracts: Infrastructure development (water, wastewater treatment, and road work).

Glynn County

- Additional rail capabilities.
- Existing manufacturing expansions for industries such as Georgia Pacific.

- Pad ready industrial site improvements at Tradewinds.
- The Manufacturers Round Table – once per quarter, around 30 of the areas manufacturers get together to discuss how they can pool their resources to make a positive impact on the area's business climate. As a group, they have decided to focus on working with the local education system to introduce students to modern manufacturing.

Liberty County

- Tradeport West Business Center infrastructure to include provision of road, water, sewer, drainage systems and rail improvements to service.
- Tradeport East water reclamation facility; road, water and sewer extensions; grading improvements; and an elevated water tank.
- Hinesville Technology Park: road, water, sewer extensions, and grading improvements.
- Midway Industrial Park Phase 3: road, water, sewer, drainage, and grading improvements.

Long County

- Industrial park improvements and infrastructure.

McIntosh County

- Continue to promote the McIntosh County industrial park and construct necessary infrastructure for industry expansion.
- Rail line reactivation/rail bridge/spur: Tie Ports of Savannah and Brunswick by reactivating the abandoned CSX line from Richmond Hill - Riceboro - Everett

Screven County

- Attract tenant to pad-ready site.
- Complete GRAD certification for industrial park and construct infrastructure (rail, gas, etc.) that will help attract industry.

- Acquire a rail-served site and prepare it for development.
- Assist existing industry with capital projects to facilitate expansion.

Guiding Principles: Business and Industry

The Regional Plan defines a vision to develop and facilitate the implementation of successful strategies that leverage existing regional economic engines, regional resources, state and federal government guidance and create a quality of life to attract compatible and strategic business opportunities, high wage jobs and investment to Georgia’s coastal communities. Our goal is that the entire region shares in jobs and investment created through an integrated balance of sustainable economic development initiatives.

Strategies

- Promote strategic distributions of business and industry across the region consistent with natural, cultural, historic and industrial resource strategies and encourage partnerships and collaboration between economic development agencies.
- Investigate ways to share costs and benefits across jurisdictional lines for both regional marketing and project support.
- Incorporate community plans for the strategic use of land for manufacturing, distribution, etc., while recognizing and respecting natural resources and the unique differences between communities.
- Coordinate with the Georgia Ports Authority (GPA) to identify their needs and identify mechanisms for the economic development industry to strengthen the GPA and its presence in logistics, distribution, and workforce development.
- Leverage and incorporate the region’s military installations (Fort Stewart Army Base, Hunter Army Airfield and Kings Bay Naval Base) and the Federal Law Enforcement Training Center to recruit economic development projects.
- Incorporate HERTY Advanced Materials Development Center’s experience and position as a development center for the commercialization of materials and create incentives to retain a portion of pilot plant opportunities as new Georgia industries

and to assist development authorities in increasing recruitment win rates.

- Coordinate federal, State and local economic development funding programs and initiatives that affect the coast.
- Enhance workforce development by collaborating with business, industry, and planning of educational entities that provide necessary workforce skills.
- Increase existing industry retention and expansion rates.
- Incorporate current and future needs for housing, infrastructure, and natural resource protection into economic development initiatives.
- Encourage international economic developments that support strategic industry sectors.

Housing

Use the following factors to evaluate the adequacy and suitability of existing housing stock to serve current and future regional needs.

Housing Types & Mix

Coastal Georgia was one of the original thirteen colonies. It's not surprising to find a rich mix of housing and significant historic housing. As the region has grown, the development of housing stock over the decades has kept pace with population growth, and regionally more homes have been built in every subsequent decade than were built in the previous decade. See Table 12 below.

The single exception to that trend has been the dramatic drop in housing construction since 2010. During this short time frame, the annualized rate of home building declined between 47% and 95% among the counties and declined 85% for the region as a whole. This information clearly shows the long lasting effects of the economic decline caused by the recent recession. See Table 13.

County	Total Units	Built 2010 or later	Built 2000 to 2009	Built 1990 to 1999	Built 1980 to 1989
Bryan	12,132	134	4,075	3,163	1,732
Bulloch	29,026	234	8,864	5,947	4,645
Camden	21,174	221	5,444	5,965	4,898
Chatham	120,146	1,321	25,540	16,230	17,257
Effingham	19,919	206	7,074	5,223	3,342
Glynn	40,872	152	9,795	6,983	6,554
Liberty	26,762	327	6,684	7,126	5,708
Long	5,979	239	1,517	1,847	1,159
McIntosh	9,171	52	2,294	2,649	1,387
Screven	6,706	42	778	1,204	1,174
CRC Region	291,887	2,928	72,065	56,337	47,856

Source: U. S. Census

County	Built 1970 to 1979	Built 1960 to 1969	Built 1950 to 1959	Built 1940 to 1949	Built 1939 or earlier
Bryan	1,395	472	287	514	360
Bulloch	3,671	2,347	1,505	448	1,365
Camden	1,741	947	946	479	533
Chatham	16,734	12,493	12,305	6,422	11,844
Effingham	1,591	853	577	258	795
Glynn	6,070	4,172	3,410	1,991	1,745
Liberty	3,395	1,503	1,029	490	500
Long	569	212	216	152	68
McIntosh	1,295	590	179	347	378
Screven	1,204	702	549	313	740
CRC Region	37,665	24,291	21,003	11,414	18,328

Source: U. S. Census

	2010+	2000-2009	1990-1999	1980-1989	1970-1979	1960-1969	1950-1959	1940-1949	1939 or earlier	Decline in bldg. rate from 2000 to 2010
Bryan	45	408	316	173	140	47	29	51	36	89%
Bulloch	78	886	595	465	367	235	151	45	137	91%
Camden	74	544	597	490	174	95	95	48	53	86%
Chatham	440	2554	1623	1726	1673	1249	1231	642	1184	83%
Effingham	69	707	522	334	159	85	58	26	80	90%
Glynn	51	980	698	655	607	417	341	199	175	95%
Liberty	109	668	713	571	340	150	103	49	50	84%
Long	80	152	185	116	57	21	22	15	7	47%
McIntosh	17	229	265	139	130	59	18	35	38	92%
Screven	14	78	120	117	120	70	55	31	74	82%
CRC Region	976	7207	5634	4786	3767	2429	2100	1141	1833	86%

Source: U. S. Census and CRC

Condition and Occupancy

Housing tenure is the term used to describe whether home occupants are renters or homeowners. It has been federal public policy for more than a decade to increase the rate of home ownership. It is felt that home ownership creates community stability, and importantly, allows home owners to build up equity in their homes and pass this equity along to subsequent generations. The creation of generational equity provides capital for future generations to afford homes of their own, and it also allows them to higher education. From a public policy perspective, this creates a more stable middle class, and more ready workforce, and stable communities.

The rate of homeownership in Coastal Georgia ranges from a low of 51% in Bulloch County to a high of 82% in McIntosh County. This compares to a statewide rate of 65.1% and a national rate of 64.9%.

County	Occupied Housing Units	Owner Occupied	Percent	Renter Occupied	Percent
Bryan	11,230	7,880	70%	3,350	30%
Bulloch	25,254	12,852	51%	12,402	49%
Camden	18,386	11,594	63%	6,792	37%
Chatham	102,484	58,886	57%	43,598	43%
Effingham	17,830	13,666	77%	4,164	23%
Glynn	31,457	19,530	62%	12,017	38%
Liberty	23,046	11,773	51%	11,273	49%
Long	4,841	3,009	62%	1,832	38%
McIntosh	4,993	4,071	82%	922	18%
Screven	5,165	3,656	71%	1,509	29%
CRC Region	244,686	146,917	60%	97,859	40%
Georgia			65.1		34.9
United States			64.9		35.1

Source: U.S. Census

Another data set that we report on, that was included in our discussion of *resilient communities*, is the percentage of mobile homes, by county. As can be seen in Table 15 below, the highest percentage of families living in mobile homes is Long County at 49.2% and the lowest percentage is Chatham County at 4.6%.

Table 15	
Percentage Living in Mobile Homes	
County	Percent Mobile Home
Bryan	13.90%
Bulloch	18.30%
Camden	14.20%
Chatham	4.60%
Effingham	24.00%
Glynn	12.70%
Liberty	18.50%
Long	49.20%
McIntosh	39.60%
Screven	34.00%
Source: U. S. Census	

One of the many things that the U. S. Census gathers data on is the condition of housing. The government defines substandard housing as housing units that lack one or more of the following items: complete plumbing facilities, complete kitchen facilities, no telephone service available, and overcrowding, defined as 1.5 or more persons per room. Since it is quite possible that a housing unit may have one or more of these conditions, but perhaps not all of these conditions, it is difficult to get an accurate total of the number of substandard units. The totals reflected below in Table 16 probably skew towards the high side, but it is still a valid indicator of housing needs in the community.

County	Total Units	Lacking complete plumbing facilities	Lacking complete kitchen facilities	No telephone service available	1.5 or more persons per room	Total Substandard Units	Percent Substandard Units
Bryan	13,132	90	70	275	20	455	3.5%
Bulloch	25,254	90	147	907	215	1,359	5.4%
Camden	18,386	123	157	474	76	830	4.5%
Chatham	102,484	279	499	2,226	339	3,343	3.3%
Effingham	17,830	53	111	283	112	559	3.1%
Glynn	31,547	388	384	1,047	156	1,975	6.3%
Liberty	23,046	51	9	359	69	488	2.1%
Long	4,841	21	5	134	26	186	3.8%
McIntosh	4,993	67	47	245	0	359	7.2%
Screven	5,165	12	87	189	0	288	5.6%
CRC Region	246,678	1,174	1,516	6,139	1,013	9,842	4.0%

Source: U. S. Census

Cost of Housing

The cost of housing in the region, both for owners and renters, in terms of affordability is evaluated based upon the percentage of gross family income that must be set aside for housing. For home owners, housing cost is the sum of principal, interest, taxes, and insurance (PITA). For renters, housing cost is the sum of rent paid plus utilities.

Cost-Burdened Households

Evaluate the needs of households that are cost-burdened (paying 30% or more of net income on total housing costs) and severely cost-burdened (paying 50% or more of net income on total housing costs). Also evaluate the relationship of local housing costs and availability to the socioeconomic characteristics of these households, including income, income from social security or public assistance, employment status, occupation, household type, age of householder, household size, race, and unit type.

Table 17.1					
Housing Cost Burden - Owner-Occupied Housing Units with a Mortgage					
County	Housing Units with a mortgage	Monthly Costs 30.0-34.9%	Percent	Monthly Costs 35%+	Percent
Bryan	5,843	679	12%	1,123	19%
Bulloch	7,799	694	9%	1,705	22%
Camden	7,892	727	9%	2,336	30%
Chatham	38,791	2,892	7%	12,008	31%
Effingham	9,692	788	8%	1,918	20%
Glynn	12,147	783	6%	3,581	29%
Liberty	8,376	703	8%	2,351	28%
Long	1,934	149	8%	476	25%
McIntosh	2,037	115	6%	772	38%
Screven	1,812	133	7%	502	28%
CRC Region	96,323	7,663	8%	26,772	28%

Source: U. S. Census

Table 17.2					
Housing Cost Burden - Owner-Occupied Housing Units without a Mortgage					
County	Housing Units without a mortgage	Monthly Costs 30.0-34.9%	Percent	Monthly Costs 35%+	Percent
Bryan	2,026	8	0.4%	284	14%
Bulloch	4,847	207	4.3%	382	8%
Camden	3,568	90	2.5%	467	13%
Chatham	19,470	529	2.7%	2,426	12%
Effingham	3,886	50	1.3%	274	7%
Glynn	7,259	195	2.7%	756	10%
Liberty	3,248	114	3.5%	360	11%
Long	1,053	0	0.0%	79	8%
McIntosh	2,034	55	2.7%	243	12%
Screven	1,804	55	3.0%	203	11%
CRC Region	49,195	1,303	2.6%	5,474	11%

Source: U. S. Census

County	Housing Units paying rent	Gross Rent 30.0-34.9%	Percent	Gross Rent 35%+	Percent
Bryan	2,971	358	12%	978	33%
Bulloch	11,107	793	7%	5,724	52%
Camden	6,354	635	10%	2,356	37%
Chatham	39,968	3,901	10%	18,867	47%
Effingham	3,775	372	10%	1,326	35%
Glynn	11,180	926	8%	4,963	44%
Liberty	10,253	1,080	11%	4,102	40%
Long	1,717	80	5%	679	40%
McIntosh	725	31	4%	315	43%
Screven	1,082	81	7%	498	46%
CRC Region	89,132	8,257	9%	39,808	45%

Source: U. S. Census

Special Housing Needs

Evaluate special housing needs in the region (e.g., housing needs of residents who are elderly; homeless; victims of domestic violence; migrant farm workers; persons with mental, physical, or developmental disabilities; persons with HIV/AIDS; and persons recovering from substance abuse) using information obtained from local service providers on caseloads, waiting lists, etc.

Jobs-Housing Balance

Evaluate housing costs compared to wages and household incomes of the resident and nonresident workforce to determine whether sufficient affordable housing is available and appropriately distributed within the region to allow people to live near where they work. Data on the commuting patterns of the resident and nonresident workforce may assist in determining whether there is a jobs-housing balance issue in the region. Also evaluate any barriers that may prevent a significant proportion of the region's nonresident workforce from residing in the jurisdiction, such as a lack of suitable or affordable housing, suitably zoned land, etc.

Community Facilities and Services

Evaluate the following major public facilities and services. Evaluate the adequacy and useful life of these facilities and services for meeting future needs of the region and how to make the most efficient use of existing infrastructure to accommodate future development in the region. Also evaluate how service areas or levels of service are likely to influence future development patterns or impact natural or cultural resources, and identify how these facilities may be used to appropriately direct development patterns of the region.

Water Supply and Treatment

Identify both distribution and treatment systems, whether publicly or privately operated;

Sewerage System and Wastewater Treatment

Identify both collection and treatment systems, whether publicly or privately operated. Also evaluate the use of onsite septic systems within the region, especially where their widespread use may have adverse environmental impacts; and

Other Facilities and Services

Identify fire protection, public safety, parks and recreation, stormwater management, and solid waste management facilities.

Intergovernmental Coordination

Evaluate the adequacy, opportunities, suitability, and need for coordination mechanisms and processes in the region considering:

All local governments within the region;

Independent special authorities and districts, such as water and sewer authorities and districts;

School boards;

Independent development authorities and districts, such as industrial or downtown development authorities; and

Any federal, state, or regional programs and activities that relate to local planning, such as the Coastal Management Program, the Appalachian Regional Commission's Program, strategies for air-quality non-attainment areas, sub-state regional water supply and/or water quality protection plans, greenspace programs, and regional transportation plans.

Transportation System

Map the service areas and/or levels of services for the following major components of the local transportation system. Evaluate the adequacy these components for serving needs of the region throughout the planning period.

Road Network

Identify roads, highways and bridges. Also identify any significant issues with the road network, including connectivity, signalized intersections or inadequate signage.

Alternative Modes

Identify bicycle, pedestrian facilities and public transportation or other services for populations without automobiles. Also identify areas of the region where mode choice is limited. Evaluate how effectively mobility needs of the region are met by these alternative transportation modes.

Railroads, Trucking, Port Facilities and Airports

Identify freight and passenger rail lines, major rail intermodal facilities, non-rail freight operations, seaports, harbors, and commercial and general purpose air terminals. Evaluate the impact of these on the overall transportation network.

Transportation and Land Use Connection

Identify areas of the region experiencing significant traffic congestion or having significantly underutilized transportation facilities. Evaluate the role of land use (e.g., scale of development, inefficient development patterns) in this mismatch of facility capacity and demand.