

TOWN OF HILTON HEAD ISLAND
**COMMUNITY PROFILE
AND BENCHMARK ANALYSIS**

This report presents an analysis of the demographic and economic conditions and trends of Hilton Head Island, South Carolina, USA

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This report has been prepared by Future iQ as part of the development of a new community vision for Hilton Head Island and aims to present a baseline economic and demographic analysis of the town. This report is a description of Town of Hilton Head Island and includes population projections; current population make up by age and race; select characteristics of households; labor force, income, and, employment characteristics.

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PREPARED BY:

future→iQ

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1.0 INTRODUCTION

This Benchmark Report profiles Hilton Head Island, population 39,701, an incorporated coastal community in South Carolina. It further provides in-depth metrics in comparison to six additional communities. The purpose of this Benchmark Report is to provide valuable insight into Hilton Head Island and how it relates to other communities in preparing the Hilton Head Island community to update their community vision.

Hilton Head Island is located 30 miles north of Savannah Georgia and 98 miles south of Charleston South Carolina. The island is connected to mainland South Carolina by US HWY 278. Between the mainland and Hilton Head Island lies open waters, coastal marsh, and notably the Pickney Island National Wildlife Refuge. Once on the island, the main transportation route is a loop extension of HWY 278. Hilton Head Island is known for a rich history in culture, trade, and as a vacation destination with a summer seasonal population reaching 150,000.

1.1 HILTON HEAD ISLAND DEMOGRAPHICS

Figure 1 shows historic and projected populations from 2000 to 2030 for Hilton Head Island and Beaufort County. In 2015, the population of the Town of Hilton Head Island was estimated to be 39,071, with a median age of 54.1, having steadily grown from a population of 33,862 in 2000. Hilton Head Island’s 2030 population is projected to be 43,949, a 12 percent growth from 2015.

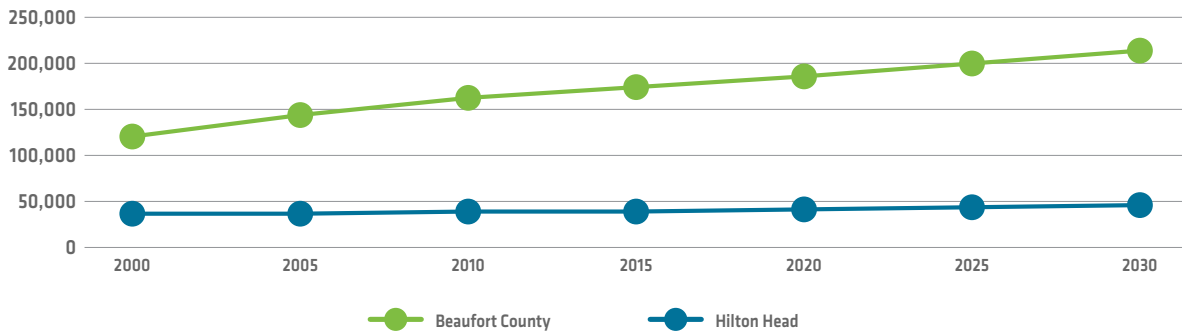


Figure 1 Historic Population and Projections for Hilton Head Island, Beaufort County. Sources: Beaufort County projections, SC Revenue and Fiscal Affairs Office; Hilton Head Island projections, extrapolated; historic population, 2000 and 2010 Decennial Census.

Figure 2 shows the rate of population change for Hilton Head Island, Beaufort County, and South Carolina. The State of South Carolina, Revenue and Fiscal Affairs Office projects the populations of Beaufort County to grow at rates of 7.9 to 6.5 percent from 2015 to 2030, similarly they project South Carolina to grow at rates of 4.1 to 4.3 percent in that same time. Extrapolating the projections to Hilton Head Island, assuming Hilton Head Island’s growth remains similarly proportional to the growth of Beaufort County, Hilton Head Island is expected to grow at rates between 4.3 and 3.8 percent.

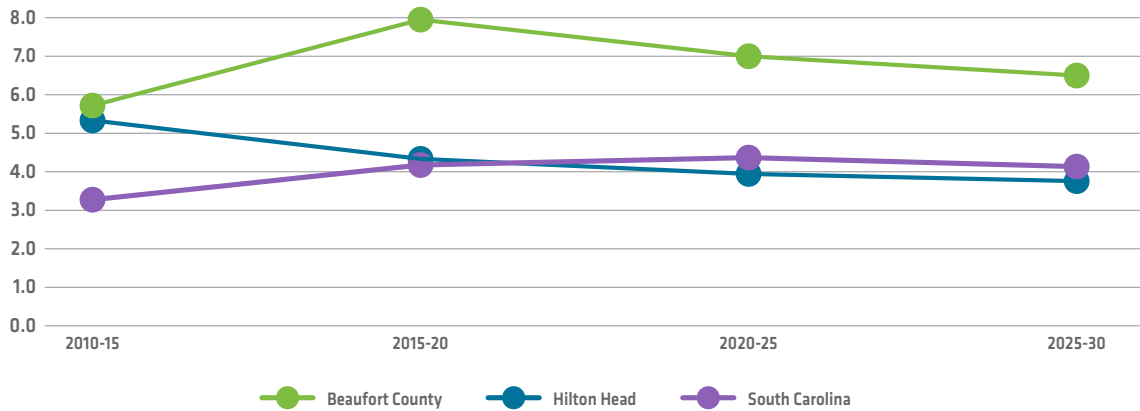


Figure 2 Percent population change for Hilton Head Island, Beaufort County, and South Carolina. Sources: Beaufort County and South Carolina, SC Revenue and Fiscal Affairs Office; Hilton Head Island, extrapolated.

1.2 HILTON HEAD ISLAND ECONOMICS

Table 1 summarizes the high-level economic and demographic attributes of Hilton Head Island. The Median income for individuals is 44,869 dollars, 18.3 percent of the population earns less than 150 percent of the poverty line, and 54.4 percent of the population 16 and over is participating in the work force (workforce participation rate).

There are two major occupations in which Hilton Head Island’s workforce is employed: 1) management, business, and financial services and 2) sales and related. These two collectively account for 34.6 percent of occupations for residents of Hilton Head. Across industries, the major areas of employment are in 1) accommodations and food service, 2) retail trade, and 3) construction. Collectively, these industries account for 36.8 percent of the jobs for residents of Hilton Head Island.

Table 1. Introduction to Hilton Head Island Demographics and Economics Summary

Population (2000)	33,862
Population (2015)	39,071
Projection Population (2030)	39,658
Median Age	54.1
Workforce Participation Rate	54.4%
Working in the County	91.9%
Median Income	\$44,869
Population Below 150% of Poverty Line	18.3%
Major Occupations	Management, business, and financial Sales and Related
Major Industries	Accommodations and Food Service Retail Trade Construction

Source: 2000 Decennial Census; 2015 5-Year American Community Survey; Projections extrapolated from SC Revenue and Fiscal Affairs Office projections.

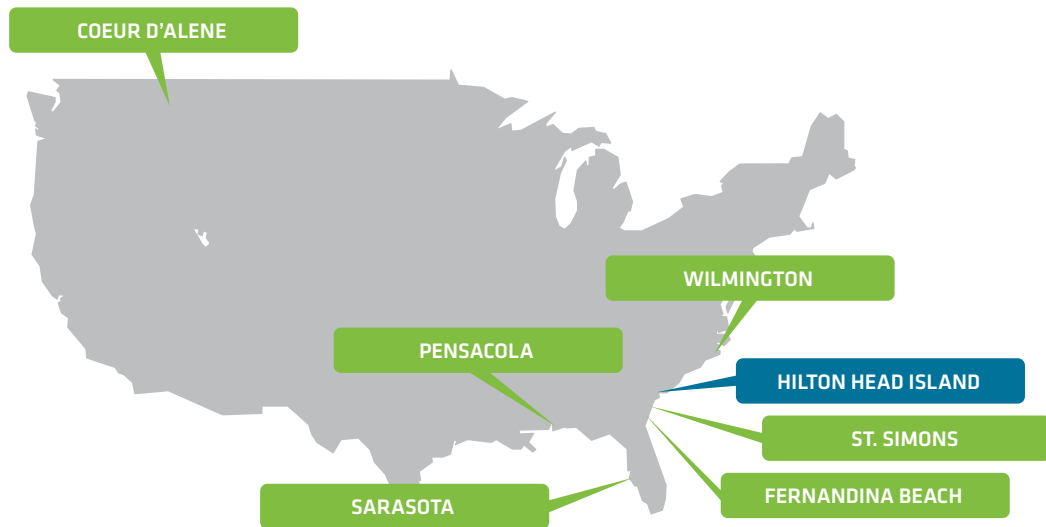


2.0 BENCHMARK COMMUNITIES

This report identifies benchmark communities and their similarities and differences to Hilton Head Island. The Future iQ team along with the local planning team identified similar and slightly aspirational communities based on key factors including:

- Similar or larger populations,
- Strong presence of tourism, arts, culture, and related activities, and
- Similar coastal development constraints.

The benchmark communities included in this report are 1) Coeur d’Alene, Idaho, 2) Fernandina Beach, Florida, 3) Pensacola, Florida, 4) Sarasota, Florida, 5) St. Simons Island, Georgia, and 6) Wilmington, North Carolina. Map 1 shows the locations of Hilton Head Island and Benchmark Communities.



Map 1 Location of Hilton Head Island and Benchmark Communities

2.1 COEUR D’ALENE, IDAHO

Coeur d’Alene, population 46,796, is the county seat and largest city in Kootenai County, located in Northern Idaho. Located on US Interstate 90 near the border of Washington State, 33 miles from Spokane, WA, Coeur d’Alene is on the northern end of Lake Coeur d’Alene near the Kootenai National Forest and the Coeur d’Alene Indian Reservation.

2.2 FERNANDINA BEACH, FLORIDA

Fernandina Beach, population 21,320, is an Atlantic Coastal community in Northeastern Florida near the Georgia border. Included in this report is the Census County Subdivision of Fernandina Beach, which also includes Amelia City, American Beach, and Franklin Town. Collectively these communities make up Amelia Island, but for the purposes of this report are referred to as Fernandina Beach. Fernandina Beach is 36 miles from Jacksonville, Florida. Fernandina Beach is separated from main land Florida and is accessible by State HWY 200.

2.3 PENSACOLA, FLORIDA

Pensacola, population 52,752, is a Gulf Coast community on the Florida Panhandle. Pensacola is located near the Florida-Alabama border on US Interstate 10 and US HWYs 29 and 90. Pensacola is 59 miles east of Mobile, Alabama and 52 miles from Crestview, Florida. Pensacola is protected from the Gulf by Santa Rosa Island, is rich in history, and home to a large US Naval base and the University of West Florida.

2.4 SARASOTA, FLORIDA

Sarasota, population 53,583, is a Gulf Coast community in Southern Florida. Sarasota is 60 miles south of Tampa, Florida, and 80 miles north of Fort Meyers, Florida. Sarasota is located where US Interstate 75 intersects with State HWYs 70 and 72. Through Sarasota, one can access numerous barrier islands including Longboat Key, Lido Key, and Siesta Key. Sarasota's limits include several developed barrier islands. Sarasota is notable for its historic architecture and is home to the Sarasota School of Architecture.

2.5 ST. SIMONS ISLAND, GEORGIA

St. Simons, population 13,287, is a census designated place on the Atlantic Coast located north of the Georgia-Florida border. St. Simons is accessible from the mainland by way of a local road, Torras Causeway, off US HWY 17, halfway between Savannah and Jacksonville. It is one of Georgia's "Gold Isles," contiguous with Sea Island and Little St. Simons Island (privately owned). Sea Island is home to Fort Frederica National Monument. Adjacent to St. Simons on the mainland is Brunswick, home to the College of Coastal Georgia.

2.6 WILMINGTON, NORTH CAROLINA

Wilmington, population 111,998, is located on the Atlantic Coast, near the North Carolina-South Carolina border. Wilmington is located at the intersections of US Interstate 40, and US HWYs 421 and 17. Wilmington is 58 miles south of Jacksonville, North Carolina, and 74 miles north of Myrtle Beach, South Carolina. Wilmington is protected by barrier islands including Wrightsville Beach and Masonboro Island. Wilmington is a historical colonial city, and is home to the University of North Carolina at Wilmington, and is a designated Coast Guard City.



3.0 DEMOGRAPHIC INDICATORS

3.1 MEDIAN AGE AND POPULATION

Median age and population for each benchmark community in comparison to the US and South Carolina are shown in Table 2. Benchmark communities range in population from 13,287 (St. Simons) to 111,998 (Wilmington). The populations in Hilton Head Island, Coeur d’Alene, Pensacola, and Sarasota are within a range of 14,512, making these a cluster of the most similarly populated places. However, the island communities of St. Simons and Fernandina Beach (Census designated place - CDP) may prove more useful in thinking about how growing populations are accommodated in a coastal community.

Benchmark communities have median ages ranging from 34.9 (Wilmington, NC) to 55 (Fernandina Beach). The communities of Hilton Head Island, St. Simons, and Fernandina Beach are the oldest with a median age range of 52.8 to 55. The other benchmark communities, Pensacola, Sarasota, and Wilmington have median ages that more resemble the median ages of South Carolina (38.6) and the US (37.6).

Table 2. Median Age and Population 2015

	Median Age	Population
Hilton Head Island	54.1	39,071
Coeur d’Alene, ID	35.7	46,796
Fernandina Beach (CDP), FL	55	21,320
Pensacola, FL	40.3	52,752
Sarasota, FL	45.9	53,583
St. Simons (CDP), GA	52.8	13,287
Wilmington, NC	34.9	111,998
South Carolina	38.6	4,777,576
United States	37.6	316,515,021

Source: 2015 5-Year American Community Survey

3.2 RACE AND LANGUAGE

Race by percent of the population and percent of households with limited English speaking ability for each benchmark community in comparison to the US and South Carolina are shown in Table 3. All benchmark communities, like South Carolina and the US are majority White. However, the range of percent population in benchmark communities that is White varies greatly, from 63.6 (Pensacola) to 92.6 (Coeur d’Alene)

percent. Pensacola, Sarasota, and Wilmington stand out as communities with larger Black or African American populations. Hilton Head Island and Sarasota stand out as having larger Hispanic populations. Hilton Head Island stands out as having the largest percent population of people that claimed a race other than the ones listed here.

In the US, 4.5 percent of households have limited English speaking abilities. The benchmark communities have a range of 0.1 to 5.1 percent of their households having limited English speaking abilities. Hilton Head Island is toward the higher end of this range, with 3.3 percent of its households having limited English speaking abilities.

Table 3. Race, Limited English Speaking, Percent of Population 2015

	White	Black or African American	American Indian	Asian	Native Hawaiian	Other	Two or more Races	Hispanic (All Races)	Households With Limited English Speaking
Hilton Head Island	83.4	7.7	0.1	1.0	0.0	6.0	1.1	13.7	3.3
Coeur d'Alene, ID	92.6	0.4	0.9	0.9	0.0	0.7	2.6	5.3	0.1
Fernandina Beach (CDP), FL	84.4	9.4	0.0	2.8	0.1	0.4	1.7	3.3	0.6
Pensacola, FL	63.6	27.2	0.2	1.9	0.0	0.7	5.2	3.7	1.3
Sarasota, FL	79.5	15.0	0.1	1.2	0.0	1.4	1.9	16.9	5.1
St. Simons (CDP), GA	91.6	2.0	0.6	2.1	0.1	1.3	1.8	3.3	1.5
Wilmington, NC	75.8	18.7	0.4	1.7	0.0	1.2	1.3	5.4	2.2
South Carolina	66.5	27.2	0.3	1.4	0.1	1.5	1.9	5.2	1.6
United States	72.8	12.4	0.8	5.1	0.2	4.6	2.9	16.8	4.5

Source: 2015 5-Year American Community Survey

3.3 POVERTY

The percentage of the population living below 150 percent of the poverty level is shown for the benchmark communities in comparison to the US and South Carolina in Table 4. In the US, 24.9 percent of the population (for whom poverty status is determined) live below 150 percent of the poverty line. This equates to making equal to or less than 17,655 dollars per year. South Carolina has a slightly higher percentage of its population (28.6) living below 150 percent of the poverty line. In the benchmark communities, populations below 150 percent of the poverty line range from 10.1 (St. Simons) to 34.1 percent (Wilmington, NC). Hilton Head Island, with 18.3 percent of its population living below 150 percent of the poverty line, is most similar Fernandina Beach (15.3).

Table 4. Percent Population Below 150% of the Poverty Level (\$17,655)

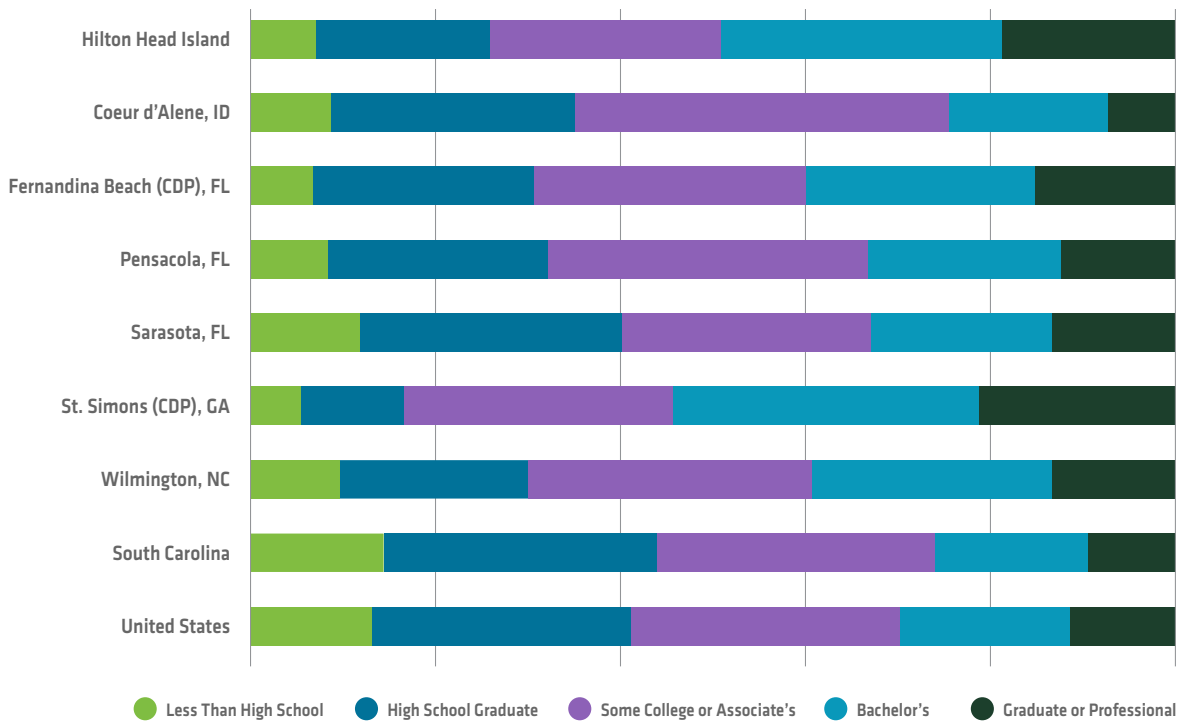
Hilton Head Island	18.3
Coeur d’Alene, ID	25.5
Fernandina Beach (CDP), FL	15.3
Pensacola, FL	24.5
Sarasota, FL	28.7
St. Simons (CDP), GA	10.1
Wilmington, NC	34.1
South Carolina	28.6
United States	24.9

Source: 2015 American Community Survey

3.6 EDUCATIONAL ATTAINMENT

Figure 3 shows educational attainment by percent of the populations 25 years and older for the benchmark communities in comparison to the US and South Carolina. Hilton Head Island, Fernandina Beach, Pensacola, Sarasota, St. Simons, and Wilmington all stand out as being more highly educated than the US and South Carolina. They have greater percentages of their population with graduate and professional degrees. The most highly educated of those are St. Simons and Hilton Head Island. Similarly, St. Simons and Hilton Head Island have the greatest percent of their populations having Bachelor’s degrees. All the benchmark communities have less percent of their populations with less than a high school diploma (or equivalent) in comparison to the US and South Carolina.

Figure 3. Educational Attainment, Percent of Population 25 and Older





4.0 HOUSEHOLDS

Select household characteristics are shown in Table 5 and Figure 4 for the benchmark communities in comparison to the US and South Carolina. In the US, 64 percent of households are owner occupied, and 66 percent of households are families. The benchmark communities range from 44 (Wilmington) to 74 (Hilton Head Island) percent owner occupied. Notably Hilton Head Island has the greatest percent of owner occupied households, and is most similar to Fernandina Beach and St. Simons. The benchmark communities range from 50 (Sarasota) to 65 (Hilton Head Island and Fernandina Beach) percent of households being families. Overall, the benchmark communities have less family households than the US and South Carolina, but they range in having less and greater owner occupied households.

In the US, there are 0.07 seasonal households per capita. These are residences used seasonally or for recreational use. In the benchmark communities, there is a range of 0.00 (Coeur d'Alene) to 0.10 (Sarasota) seasonal households per capita. Hilton Head Island falls somewhere in the middle of this range with 0.04 seasonal households per capita, which is lower than the US, but greater than in South Carolina. Hilton Head Island is most similar in this measure to Wilmington.

The median household income in the US is 53,889 dollars. The benchmark communities have a range of household incomes from 42,128 (Sarasota) to 66,646 (Hilton Head) dollars. Hilton Head Island is most similar in median household income to St. Simons.

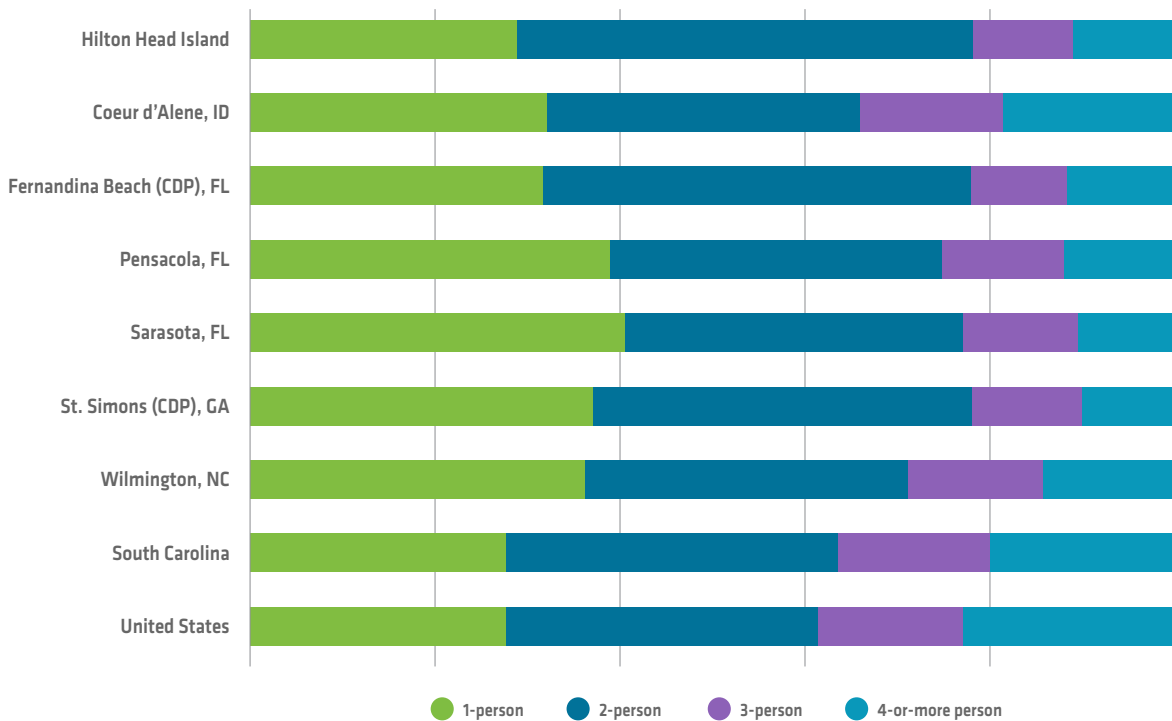
Table 5. Select Household Characteristics

	% Owner Occupied	% Family Homes	Seasonal Households Per Capita	Median Income (\$)
Hilton Head Island	74	65	0.04	66,646
Coeur d'Alene, ID	58	60	0.00	43,033
Fernandina Beach (CDP), FL	71	65	0.01	55,514
Pensacola, FL	59	53	0.02	45,527
Sarasota, FL	53	50	0.10	43,244
St. Simons (CDP), GA	69	58	0.02	65,769
Wilmington, NC	44	51	0.05	42,128
South Carolina	69	67	0.02	45,483
United States	64	66	0.07	53,889

Source: 2015 5-Year American Community Survey

Figure 4 shows the household make up by size for the benchmark communities in comparison to the US and South Carolina. Households in the US are 28 percent comprised of 1-person, 34 percent of 2-people, 16 percent of 3-people, and 23 percent of 4 or more people. All of the benchmark communities have a greater percent of their households made up of fewer people. Hilton Head Island differs from the US, South Carolina, and the Benchmark communities with the greatest percent (50) of its population in 2 person households.

Figure 4. Distribution of Households by Size





5.0 LABOR AND INDUSTRY

Table 6 shows the labor force participation rate and unemployment rate for the benchmark communities in comparison to the US and South Carolina. In the US, 63.7 percent of the population (those 16 years and older) participate in the workforce, they are working or actively looking for work. Benchmark communities have labor force participation rates ranging from 49.1 to 64.1 percent. Hilton Head Island is near the lower end of this with 54.4 percent of its population participating in the labor force. Similarly, Fernandina Beach, St. Simons, and Sarasota have low labor force participation rates.

The unemployment rates in Table 6 are taken from the 2015 5-Year American Community Survey, and represent a longer-term measurement of unemployment than do other sources that publish monthly or quarterly measures of unemployment, muting the short-term impacts seen in more short-term measurements. The unemployment rate measures those participating in the labor force that are currently unemployed. In the US, the unemployment rate is 8.3 percent. Benchmark communities range in 5.1 (Hilton Head Island) to 10.3 (Sarasota and Wilmington) percent unemployment. Hilton Head Island is most like St. Simons with an unemployment rate of 6.5 percent.

Table 6. Labor Force Participation and Unemployment

	Labor Force Participation Rate (%)	Unemployment Rate (%)
Hilton Head Island	54.4	5.1
Coeur d' Alene, ID	64.1	8.6
Fernandina Beach (CDP), FL	49.1	9.9
Pensacola, FL	63.1	8.9
Sarasota, FL	58.2	10.3
St. Simons (CDP), GA	58.0	6.5
Wilmington, NC	64.4	10.3
South Carolina	60.9	9.5
United States	63.7	8.3

Source: 2015 5-Year American Community Survey

Table 7 shows commuting patterns in the benchmark communities in comparison to the US and South Carolina. In the US, 72 percent of worker work in their county of residence, and 24 percent of workers work outside their county of residence. The remaining workers work outside their state of residence. In the benchmark communities 75 (Fernandina Beach) to 94 (St. Simons) percent of their workers work within their county of residence, and 2 (Coeur d’Alene) to 17 (Fernandina Beach) percent work outside their county of residence. In these metrics, Hilton Head Island is most like St. Simons, but is also somewhat like Coeur d’Alene, Pensacola, and Wilmington.

Mean travel time to work in the US is 26 minutes. The benchmark communities range from 16 (St. Simons) to 24 (Fernandina Beach) minutes. This accounts for all modes of transport including car and public transit. Hilton Head Island is toward the bottom of the range with 18-minute travel times to work.

Table 7. Commuting Patterns

	Work in County (%)	Work Outside County (%)	Mean Travel Time to Work (Min)
Hilton Head Island	92	4	18
Coeur d’Alene, ID	83	2	18
Fernandina Beach (CDP), FL	75	17	24
Pensacola, FL	89	8	20
Sarasota, FL	87	12	20
St. Simons (CDP), GA	94	4	16
Wilmington, NC	91	8	18
South Carolina	71	24	24
United States	72	24	26

Source: 2015 5-Year American Community Survey

5.1 OCCUPATIONAL EMPLOYMENT

Tables 8 and 9 describe occupational employment for the benchmark communities. Occupational employment describes the employment of residents in benchmark communities in occupational groups, clusters of jobs with similar functions, across all industries. Table 8 shows the proportion of jobs in each benchmark community in each occupational cluster. Hilton Head Island shows high proportions of jobs in management, business, and finance, and sales.

Table 8. Share of County Resident Employment by Occupation (Shown as Percent)

	Hilton Head Island	Fernandina Beach CDP, FL	Pensacola, FL	Sarasota, FL	St. Simons (CDP), GA	Coeur d'Alene, ID	Wilmington, NC
Management, business, and financial occupations	17.8	17.1	13.3	12.7	24.4	13.3	15.4
Computer, engineering, and science occupations	2.4	4.1	4.1	2.3	1.9	4.0	3.8
Education, legal, community service, arts, and media occupations	8.0	10.6	13.3	10.7	17.5	9.3	13.3
Healthcare practitioner and technical occupations	4.9	8.3	7.7	5.6	7.3	4.1	7.4
Healthcare support occupations	1.0	1.9	3.4	4.0	2.0	2.2	2.3
Protective service occupations	2.1	3.0	1.3	1.6	3.3	1.7	1.3
Food preparation and serving related occupations	10.0	7.7	7.8	10.4	8.1	9.2	9.3
Building and grounds cleaning and maintenance occupations	7.6	6.0	4.0	8.9	1.3	2.8	4.1
Personal care and service occupations	3.3	4.6	3.1	4.6	2.5	5.4	4.4
Sales and related occupations	16.8	7.7	13.5	13.6	11.7	13.2	13.8
Office and administrative support occupations	9.6	9.2	13.1	10.5	9.6	13.3	10.3
Farming, fishing, and forestry occupations	0.9	0.0	0.0	0.0	1.5	0.9	0.0
Construction and extraction occupations	8.6	5.8	5.1	5.5	2.7	6.7	4.8
Installation, maintenance, and repair occupations	1.9	3.1	2.9	1.7	3.2	2.8	2.4
Production occupations	2.1	2.9	2.6	3.9	1.7	4.5	3.2
Transportation occupations	1.6	6.5	3.4	2.5	0.8	4.0	2.3
Material moving occupations	1.4	1.3	1.2	1.4	0.5	2.5	2.0

Source: 2015 5-Year American Community Survey

Table 9. Location Quotient of Occupational Employment of County Resident

	Hilton Head Island	Fernandina Beach CDP, FL	Pensacola, FL	Sarasota, FL	St. Simons (CDP), GA	Coeur d'Alene, ID	Wilmington, NC
Management, business, and financial occupations	1.23	1.18	0.92	0.88	1.68	0.91	1.06
Computer, engineering, and science occupations	0.45	0.77	0.77	0.43	0.36	0.74	0.70
Education, legal, community service, arts, and media occupations	0.74	0.98	1.23	0.99	1.61	0.85	1.22
Healthcare practitioner and technical occupations	0.87	1.47	1.35	0.98	1.30	0.72	1.31
Healthcare support occupations	0.39	0.76	1.36	1.60	0.82	0.89	0.93
Protective service occupations	0.92	1.36	0.59	0.70	1.49	0.78	0.57
Food preparation and serving related occupations	1.74	1.34	1.36	1.80	1.40	1.59	1.62
Building and grounds cleaning and maintenance occupations	1.90	1.51	1.00	2.23	0.31	0.69	1.01
Personal care and service occupations	0.92	1.27	0.86	1.26	0.69	1.49	1.22
Sales and related occupations	1.54	0.71	1.24	1.25	1.07	1.21	1.27
Office and administrative support occupations	0.71	0.68	0.97	0.78	0.71	0.99	0.76
Farming, fishing, and forestry occupations	1.17	0.00	0.02	0.06	2.03	1.24	0.06
Construction and extraction occupations	1.72	1.16	1.03	1.11	0.53	1.35	0.96
Installation, maintenance, and repair occupations	0.59	0.95	0.88	0.51	0.99	0.86	0.74
Production occupations	0.35	0.49	0.44	0.65	0.29	0.76	0.54
Transportation occupations	0.44	1.81	0.96	0.70	0.23	1.12	0.63
Material moving occupations	0.55	0.51	0.46	0.55	0.18	0.98	0.79
Relative to the US, more employment than one would expect.							
Relative to the US, less employment than one would expect.							
Relative to the US, similar employment.							

Source: 2015 5-Year American Community Survey

Table 9 shows the location quotient of employment by occupation. A location quotient is a comparison between the proportion of occupational employment in a sub-region’s labor force to the proportion of occupational employment in the region’s labor force. In this case, all of the geographies in Table 9 are

compared to the US. A location quotient above one indicates that the geography has more employment in the corresponding occupation than one would expect to see given the distribution of employment by occupation of the United States. Below one indicates the inverse. Location quotients close to 1, within 10% of 1, show similarities in occupational employment to the US.

Similarities and differences in occupational employment can be drawn between benchmark communities.

The following occupations are similarly employment strengths in the benchmark communities.

- Food preparation and serving
- Personal care and service
- Sales and related
- Construction

The following occupations are similarly employment weaknesses in the benchmark communities.

- Computer, engineering, and science
- Healthcare support
- Office and administrative support
- Production
- Transportation
- Materials moving

There are also some differences in occupational employment between the benchmark communities.

- Hilton Head Island, Fernandina Beach, and St. Simons stand out with unique strength in management, business, and finance.
- Hilton Head Island, Fernandina Beach, and Sarasota stand out with unique strength in building and grounds cleaning, and maintenance.
- Hilton Head Island, St. Simons, and Coeur d'Alene stand out with unique strength in farming, fishing, and forestry.

Numerous other comparisons can be made. These strengths and weaknesses provide insights into which occupations residents rely on the most, and which skills are most present.

5.2 INDUSTRY EMPLOYMENT

Tables 9 and 10 describe industry employment for the benchmark communities. Table 9 shows the proportion of jobs in each benchmark community in each industry. Hilton Head Island shows high proportions of jobs in accommodations and food service, retail trade, and construction.

Table 10. Share of County Resident Employment by Industry (Shown as Percent)

	Hilton Head Island	Fernandina Beach CDP, FL	Pensacola, FL	Sarasota, FL	St. Simons (CDP), GA	Coeur d'Alene, ID	Wilmington, NC
Agriculture, forestry, fishing and hunting, and mining	1.3	1.0	0.6	0.2	0.2	2.7	0.1
Construction	10.6	6.2	5.8	6.4	6.9	9.0	6.5
Manufacturing	4.0	7.8	3.4	3.2	6.3	6.3	6.0
Wholesale trade	1.4	0.8	2.4	1.7	2.9	2.6	2.4
Retail trade	11.1	11.6	13.2	11.6	9.5	14.9	13.2
Transportation and warehousing	2.5	6.8	3.1	2.9	1.6	3.6	2.4
Utilities	0.5	0.7	1.2	0.4	0.1	0.5	1.0
Information	2.8	0.7	2.5	1.4	1.3	1.8	2.3
Finance and insurance	2.9	2.7	4.6	3.2	4.3	4.5	3.1
Real estate and rental and leasing	6.0	3.0	3.3	4.1	3.6	2.5	2.2
Professional, scientific, and technical services	7.3	6.2	6.5	8.1	8.2	5.1	7.7
Management of companies and enterprises	0.0	0.2	0.0	0.1	0.0	0.3	0.1
Administrative and support and waste management services	6.2	4.2	4.9	7.1	4.9	4.9	4.1
Educational services	6.1	8.6	9.4	7.9	9.1	7.1	10.3
Healthcare and social assistance	8.2	15.6	16.0	16.3	9.8	12.4	14.7
Arts, entertainment, and recreation	6.7	3.3	1.9	3.5	4.4	2.8	2.7
Accommodation and food services	15.1	12.3	10.7	13.7	15.4	10.5	13.1
Other services, except public administration	5.8	6.3	5.7	6.0	5.8	4.6	6.1
Public administration	1.6	2.2	4.7	2.2	5.6	3.7	2.1

Source: 2015 5-Year American Community Survey

Table 11. Location Quotient of Industry Employment of County Residents

	Hilton Head Island	Fernandina Beach CDP, FL	Pensacola, FL	Sarasota, FL	St. Simons (CDP), GA	Coeur d'Alene, ID	Wilmington, NC
Agriculture, forestry, fishing and hunting, and mining	0.64	0.50	0.29	0.11	0.11	1.39	0.05
Construction	1.71	1.00	0.94	1.04	1.11	1.46	1.05
Manufacturing	0.38	0.75	0.33	0.31	0.61	0.61	0.57
Wholesale trade	0.53	0.28	0.90	0.62	1.06	0.94	0.87
Retail trade	0.96	1.00	1.15	1.00	0.82	1.29	1.15
Transportation and warehousing	0.60	1.66	0.76	0.70	0.40	0.87	0.58
Utilities	0.57	0.79	1.39	0.48	0.17	0.58	1.16
Information	1.33	0.32	1.16	0.67	0.60	0.87	1.08
Finance and insurance	0.63	0.58	0.99	0.68	0.91	0.96	0.67
Real estate and rental and leasing	3.16	1.57	1.77	2.17	1.93	1.33	1.19
Professional, scientific, and technical services	1.09	0.93	0.97	1.22	1.23	0.76	1.14
Management of companies and enterprises	0.43	3.04	0.00	1.25	0.00	3.63	1.04
Administrative and support and waste management services	1.44	0.99	1.16	1.67	1.16	1.16	0.96
Educational services	0.65	0.92	1.01	0.85	0.97	0.76	1.10
Healthcare and social assistance	0.59	1.13	1.16	1.18	0.71	0.90	1.07
Arts, entertainment, and recreation	3.10	1.51	0.86	1.63	2.03	1.31	1.26
Accommodation and food services	2.03	1.65	1.44	1.84	2.07	1.41	1.76
Other services, except public administration	1.17	1.28	1.15	1.21	1.18	0.94	1.24
Public administration	0.33	0.45	0.98	0.46	1.17	0.78	0.43
Relative to the US, more employment than one would expect.							
Relative to the US, less employment than one would expect.							
Relative to the US, similar employment.							

Source: 2015 5-Year American Community Survey

Table 11 shows the location quotient of employment by industry. Similarities and differences in industry employment can be drawn between benchmark communities.

The following industries are similarly employment strengths in the benchmark communities.

- Retail trade
- Real estate and rental and leasing
- Administrative and support and waste management services
- Arts, entertainment, and recreation
- Accommodations and food service
- Other services, except public administration

The following industries are similarly employment weaknesses in the benchmark communities.

- Agriculture, forestry, fishing, hunting, and mining
- Manufacturing
- Wholesale trade
- Transportation and warehousing
- Utilities
- Information
- Finance and insurance
- Public administration

There are also some differences in industry employment between the benchmark communities.

- Hilton Head Island, St. Simons, and Coeur d'Alene stand out with unique strength in construction.
- Hilton Head Island and Pensacola stand out with a unique strength in information.

Numerous other comparison can be made. These strengths and weaknesses provide insight into which industries residents rely on the most and the industries with which the residents are most familiar.



6.0 CONCLUSION AND KEY FINDINGS

This report provides a snapshot of the demographic and economic characteristics of Hilton Head Island at a given point in time. This report also shows some of the similarities and differences between Hilton Head Island and six benchmark communities, including: 1) Coeur d’Alene, Idaho, 2) Fernandina Beach, Florida, 3) Pensacola, Florida, 4) Sarasota, Florida, 5) St. Simons Island, Georgia, and 6) Wilmington, North Carolina. This report highlighted select characteristics in demographics, households, and economics.

6.1 KEY FINDINGS

The collection of characteristics in this report cannot be described as inherently positive or negative. Hilton Head Island and each of the benchmark communities have similarities and differences. These similarities and differences can be used to help inform the Hilton Head Island community of where they are placed in relation to other places, highlight some facts they may have not known about their community, and provide insights into how to tackle important issues. For example, one could see that there are key similarities between Hilton Head Island and St. Simons, and gather insights from St. Simons and use these similarities and differences to inform community development strategies. Some key findings from this report are described below.

- The geographic constraints of Hilton Head Island are most like Fernandina Beach and St. Simons.
- The population of Hilton Head Island, South Carolina, and Beaufort County are growing. The rate at which Hilton Head Island’s population is growing will decrease.
- 16.6 percent of Hilton Head Island’s population is non-White, 13.7 percent is Hispanic or Latino (of any race), and 3.3 percent of households speak English less than well.
- Hilton Head Island is highly educated relative to the US and South Carolina in a way that is most like St. Simons.
- Hilton Head Island, in comparison to the benchmark communities, the US, and South Carolina has the greatest median household income, the lowest labor force participation rate, and the lowest unemployment rate.
- Hilton Head Island stands out in comparison to benchmark communities, the US, and South Carolina with a large proportion of its households, 50 percent, being comprised of 2 people.
- Hilton Head Island has similar occupational employment strengths to Fernandina Beach and St. Simons. Industry employment is similar across benchmark communities, but Hilton Head Island is most like St. Simons.
- Arts, entertainment, and recreation industry jobs are proportionally more prevalent in Hilton Head Island in a way that is not replicated in any of the benchmark communities.



7.0 METHODS AND SOURCES

The demographic profile for Hilton Head Island and benchmark communities relies heavily on the: 2015 5-Year American Community Survey (ACS); 2010 Decennial Census, 2000 Decennial Census; and the South Carolina Revenue and Fiscal Affairs Office.

Population projections are taken from the South Carolina Revenue and Fiscal Affairs Office Community Profiles. The population projections for Hilton Head Island are extrapolated from historic population trends of Hilton Head Island and Beaufort County. The population projection for Hilton Head Island relies on the proportion of growth Hilton Head Island previously contributed to Beaufort County to remain similar in the years going forward. Hilton Head Island is constrained by limited land mass and transportation infrastructure, and one might assume that there is a maximum population that could be supported sustainably, or at least a point in time at which the cost of development becomes prohibitively expensive. Those factors are not considered in this report.

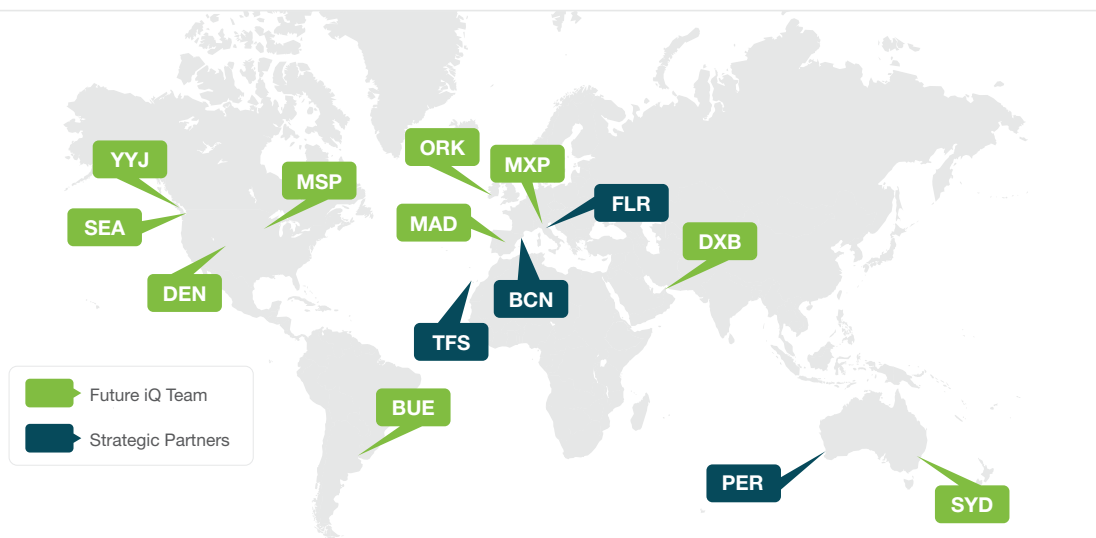
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8.0 ABOUT FUTURE IQ

Future iQ is a market leader in the development and application of scenario planning; network analysis, industry and regional analysis, and community engagement and capacity building. The company specializes in applying innovative tools and approaches to assist organizations, regions and industries in shaping their economic and community futures. With over a decade of business experience, the company has grown to have a global clientele spanning three continents.

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