Assessment of Workforce Housing Needs

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Contents

Key Findings

This Assessment of Workforce Housing Needs examines the demographic, economic and housing market trends that drive current and future demand for housing on Hilton Head Island. This report is the first deliverable in the Affordable Workforce Housing Plan that is being prepared by Lisa Sturtevant & Associates and Clemson University in collaboration with Town of Hilton Head staff and other local stakeholders. The results from the analysis—along with results from a recently-completed Beaufort County housing needs assessment and additional insights from local stakeholders—will help provide the framework for an affordable workforce housing strategy for Hilton Head Island.

- The Town of Hilton Head Island has experienced steady population growth in recent years; however, Hilton Head Island has been capturing a relatively smaller share of the region's overall growth. A key reason is that Hilton Head Island has not attracted young adults in the same way some other places have, including the Town of Bluffton.

- The primary driver of Hilton Head Island's population growth has been an increase in the 65 and older population, including both new residents and existing residents aging in place. As the population ages, the ratio of working-age population to retirement-age population on the Island has been declining significantly. If trends continue, as they likely will in the near-term without proactive initiatives on the Island, more and more Hilton Head Island residents will be relying on relatively fewer and fewer residents of working age to support the local economy.

- Over the past decade, there has been a steady increase in the white population, dramatic increases in the Hispanic population, and a decline in the Town's African American population. The increase in the Hispanic population has been important for the continued vitality of the community's leisure and hospitality industry. Preserving the history, culture and heritage of Hilton Head Island is intrinsically tied to the ability for African Americans—including many native Islanders and descendants of native Islanders—to remain part of the Hilton Head Island community.

- Hilton Head Island has a relatively high homeownership rate that remained fairly stable, even during the economic recession and housing market downturn. However, even as the overall homeownership rate has rebounded, the homeownership rate among households on Hilton Head Island headed by someone age 35 to 44—those in prime homebuying ages—remains substantially lower than it was prior to the recession.

- The average household size on Hilton Head Island has increased in recent years. In fact, the Beaufort County housing needs assessment found that overcrowding in rental housing is a bigger issue in the Town of Hilton Head Island than it is in other submarkets within the County. Larger renter households could reflect the dual trends of an increasing Hispanic population and a need among some households to live double and tripled up to afford housing.

- In recent years, the fastest growing income groups on Hilton Head Island have been those with incomes below $25,000 and those with incomes of $150,000 and above. The community has experienced a fairly significant hollowing out of middle-income households which has important

implications for housing. Higher-income households can put upward pressure on prices and rents, putting housing further out of reach of those with more modest incomes.

- The Town of Hilton Head Island is a key economic engine within Beaufort County and the broader metropolitan area. A substantial share of jobs on Hilton Head Island are visitor/tourist-supporting or resident-supporting, including Accommodation and Food Services, Retail Trade, Arts, Entertainment and Recreation, and Health Care and Social Assistance jobs.

- Hilton Head Island is increasingly competing with Bluffton and other communities for workers, particularly those in the key industries that support the tourism economy and the quality of life of residents. The majority of these workers have wages that, while competitive for the industry, are at levels that make it very challenging to find affordable housing on Hilton Head Island. For example,

  - median annual wages for workers in the Accommodation and Food Services, Arts, Entertainment and Recreation, Retail Trade, and Administrative and Support and Waste Management Services are in the $20,000s and

  - Health Care and Social Assistance workers earn higher wages at a median of $50,510 a year.

- Hilton Head Island's housing market is atypical as it includes a significant number of housing units that are occupied on a seasonal basis. About half of the Island's nearly 34,000 housing units are defined as "vacant" without a year-round occupant.

- Recent growth in the Town's housing stock has been driven by increases in new units in multifamily buildings (particularly buildings with between three and 19 units) and townhomes. There is also a stable stock of single-family detached homes on the Island.

- Compared with other communities in Beaufort County, the Town of Hilton Head Island has the highest home sales prices, with two out of five homes for sale listed for $600,000 or more. Two typical full-time workers in key economic sectors on the Island earn incomes that could allow them to purchase a home priced at no more than $200,000. While these workers comprise nearly half of the Town's employment base, the number of homes listed in this price range account for just 15.4 percent of all homes listed for sale.

- On the rental side, the estimated median rent on Hilton Head Island is $1,114, up 4.5 percent in one year. There is significant demand from Hilton Head Island workers for housing that rents for less than $875 per month, but there are relatively few units in that rent range.

- About 40 percent of all Hilton Head Island households—including 36.8 percent of homeowners and 49.4 percent of renters—are housing cost burdened, spending 30 percent or more of their income each month on housing costs. When individuals and families spend a disproportionately high share of their income on housing, there can be too little left over for other necessities, including food, health care, transportation and clothing.

- Rates of housing cost burden are significantly higher for low- and moderate-income households, including low-wage working households. There is a significant need presently for rental housing affordable to working households on Hilton Head Island with incomes below $35,000. The affordability level translates to homes (including apartments) that have rents of $875 or less. In addition, there is a substantial gap in for-sale homes affordable to moderate-income households who can afford to pay up to $200,000 for a home.

Summary of Conclusion

Detailed strategy recommendations will be produced as part of this on-going study of workforce housing needs in the community. However, the results from this assessment of demographic, economic and housing market conditions on Hilton Head Island suggest two conclusions for the Town in terms of a housing strategy going forward.

- First, there is a need to increase the supply of housing on the Island and to identify the obstacles (e.g. financial, regulatory) that could be overcome to help support the sensible development of additional workforce housing.

- Second, there is a need for housing for individuals and families of all incomes. The market can do a better job of meeting the demand for housing from higher-income households but in order to ensure that low- and moderate-wage working individuals and families can find housing they can afford, the Hilton Head Island community will have to pursue more proactive strategies.

Introduction

The Hilton Head Island community is facing challenges around ensuring there is a sufficient supply of affordable and appropriate housing to support a growing and changing workforce. The Town's focus on "strengthening community through housing" is a testament to its understanding of the important role housing plays in promoting a stable community and resilient economy. While affordable and workforce housing challenges are not uncommon around the country, Hilton Head Island has many unique characteristics that will impact the development of a housing strategic plan. These characteristics include:

- Its status as a resort and retirement community,
- A concentration of leisure and hospitality employment,
- Competition for employees with the broader region,
- Physical land constraints,
- Seasonal population flows, and
- The size of the second home market.

This *Assessment of Workforce Housing Needs* in the Town of Hilton Head Island builds off a recent report produced for Beaufort County. The *Beaufort County, South Carolina Housing Needs Assessment* was published in May 2018. The report summarizes demographic, employment and housing market conditions for the County as well as for selected submarkets, including the Town of Hilton Head Island. The report includes an assessment of current housing gaps and projections of future housing demand for the County and submarkets. Finally, the report also offers a small set of recommendations for the County and submarkets.

The *Beaufort County, South Carolina Housing Needs Assessment* provides important baseline information for the study of workforce housing needs in the Town of Hilton Head Island. This analysis builds on and expands the County assessment in four key ways:

- Updating demographic, economic and housing market data with the most recent data available for the Town of Hilton Head Island;

- Adding analysis on key demographic factors that shape the demand for housing specifically on Hilton Head Island;

- Providing more detailed analysis of the local economy and the link between job growth and housing needs, with additional data on commuting, wages and occupations; and

- Evaluating the findings from the County housing demand forecasts based on an in-depth review of demographic, economic and housing market conditions on Hilton Head Island.

As part of the Hilton Head Island Workforce Housing Study, specific policy and regulatory recommendations will be developed and compared with the recommendations in the County report.

About the Data Used in this Report

The data reported in this Workforce Housing Needs Assessment come primarily from the U.S. Census Bureau's American Community Survey (ACS). The Census Bureau collects data from a sample of residents every year. However, for smaller communities, like the Town of Hilton Head Island, the Census Bureau only reports out data every five years. Data for individual years are deemed to be unreliable because they are based on small sample sizes.

In this report, we summarize data from the 2016 ACS, which are statistics reported out in 2016 and based on data collected in the years 2012 through 2016. These statistics are labeled "2016" in the report. We also report out changes between 2011 and 2016. The 2011 data are ACS data reported in 2011 and based on data collected between 2007 and 2011.

Key Definitions Used in this Report

Housing cost burdened – Families who pay more than 30 percent of their income for housing.

Severely housing cost burdened – Families who pay more than 50 percent of their income for housing.

Housing Tenure – The financial arrangements under which a household occupies all or part of a housing unit. The most common types of tenure are ownership and rental.

Multifamily housing – A structure that has three or more residential units, typically on multiple floors.

Center for Neighborhood Technology Housing + Transportation Index – An index that incorporates transportation costs into the equation of housing affordability. The affordability benchmark used by the index is 45 percent of household income used on housing costs and transportation costs combined.

Housing Unit – A house, an apartment, a group of rooms, or a single room occupied or intended for occupancy as separate living quarters. Separate living quarters are those in which the occupants do not live and eat with other persons in the structure and which have direct access from the outside of the building or through a common hall. Housing units may be permanently occupied, seasonally occupied or vacant.

Household – A household includes all the persons who are current residents of a housing unit. The occupants may be a single family, one person living alone, two or more families living together, or any other group of related or unrelated persons who share living arrangements.

Gross Rent – The contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter (or paid for the renter by someone else).

Workforce Housing – Housing affordable to any individual with a job or any household with a working member.

Demographic Trends

Resident Population

In 2017, the Town of Hilton Head Island was home to an estimated 40,055 permanent, full-time residents. (See Appendix Table A-2.) Since 2010[i], Hilton Head Island has added nearly 3,000 net new residents, reflecting an annual population growth rate of 1.1 percent over the seven-year period. By comparison, the population of Beaufort County grew twice as fast as Hilton Head, at a 2.2 percent annual growth rate.

The Town of Bluffton has been growing significantly faster than either Hilton Head Island or the County overall, with an average annual population growth rate of 9.8 percent between 2010 and 2017. Bluffton's population growth is reflective both of significant new residential development, along with recent annexations that have led to Bluffton's position as the fifth largest town in South Carolina by land area.[ii]   The City of Beaufort's population has increased more modestly over the 2010 to 2017 period.

Figure 1. Population Growth, 2010 – 2017
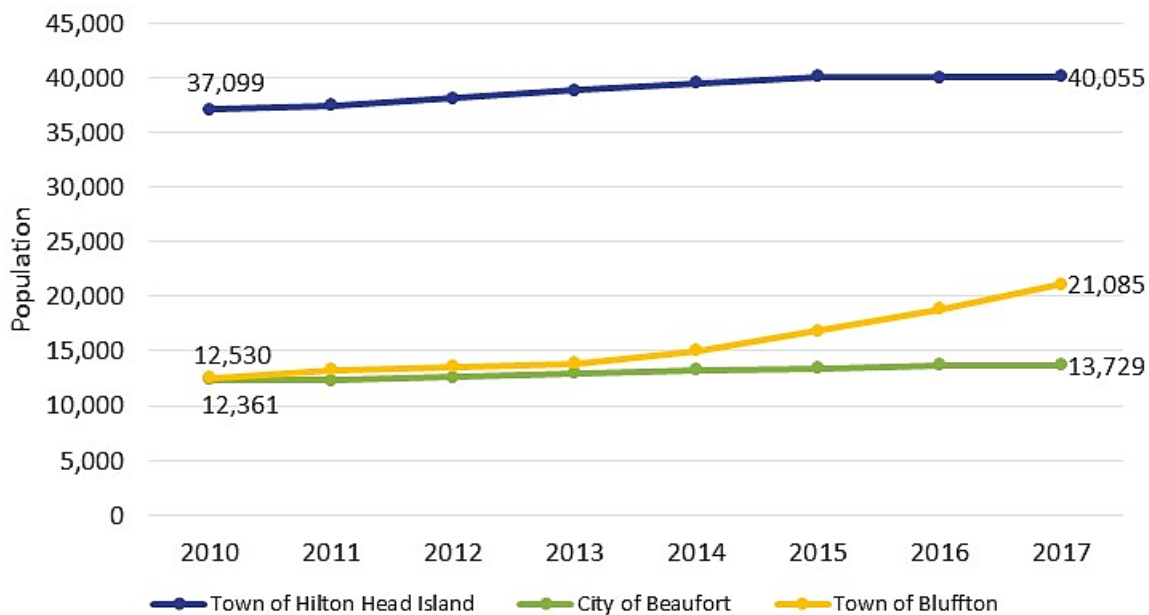
Source: U.S. Census Bureau

Age Composition

Young Adults

The Town of Hilton Head Island has been capturing a relatively smaller share of the region's growth over the past decade. In particular, the Town has not attracted young adults in the same way some other places have. According to ACS data, the Town's population increased by 7.0 percent between 2011 and 2016. However, the number of residents between the ages of 25 and 34 increased by just 6.3 percent and the population age 18 to 24 actually declined by 30.2 percent. Therefore, the overall population age 18 to 34 declined by 8.6 percent over that five-year period. By contrast, the 18 to 34-year-old population grew by 8.3 percent and 1.7 percent respectively in the Town of Bluffton and City of Beaufort during this same time period.

In the Town of Hilton Head, the biggest drop was among the population age 18 to 24 where the number of residents in this age group dropped by 30.2 percent over the 2011 to 2016 period. In 2011, the population between the ages of 18 and 34 comprised 15.9 percent; that share was 12.8 percent in 2016. (See Appendix Table A-1.) By comparison, 21.3 percent of the County's population is between the ages of 18 and 34. (See Appendix Table A-2.).

The population of young adults—often referred to as Millennials—is an important and growing source of the labor force. Communities throughout Beaufort County, and throughout the state and the nation, are focusing on how to attract and retain this population through investments in workforce development, amenities and housing options.

Older Adults

Recent population growth in the Town of Hilton Head Island was driven almost exclusively by the population age 65 to 84. Between 2011 and 2016, the number of Hilton Head Island residents age 65 to 74 increased by 21.1 percent while the population age 75 to 84 increased by 18.3 percent. Growth in the population in these age groups is due to new residents moving to Hilton Head Island but also, importantly, to existing residents aging in place. (See Appendix Table A-1.)

The older adult population comprises a significantly greater share of Hilton Head Island's population compared to neighboring communities. In 2016, one out of every three Hilton Head residents (33.3 percent) was age 65 or older, compared to one in four (24.2 percent) of Beaufort County residents. (See Appendix Table A-1.)

Hilton Head Island has always been a draw for older residents but the increase in the 65+ population has been dramatic in recent years. This increase reflects the aging of the Baby Boom population broadly and the continued attractiveness of Hilton Head Island as a retirement destination. However, as the population ages, the ratio of working-age population to retirement-age population on the Island has been declining significantly. If trends continue, as they likely will in the near-term without proactive initiatives on the Island, more and more Hilton Head Island residents will be relying on relatively fewer and fewer residents of working age to support the local economy.

Figure 2. Population Change by Age Group, Hilton Head Island, 2011-2016
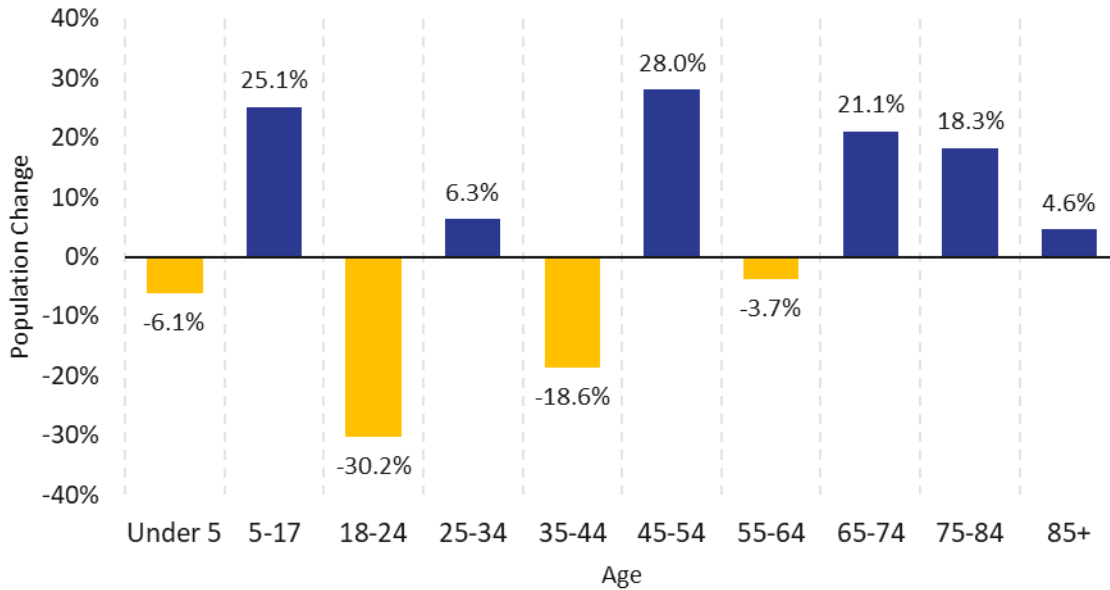
Source: U.S. Census Bureau, 2010 decennial Census and American Community Survey

Race/Ethnicity

The Town of Hilton Head Island has a growing Hispanic community and a relatively small African-American community compared to the rest of Beaufort County. In 2016, an estimated 77.2 percent of Hilton Head Island's population was non-Hispanic white, a higher share than the County as a whole or either the Town of Bluffton or City of Beaufort. Along with the Town of Bluffton, the Town of Hilton Head Island has one of the largest shares of Hispanic residents in Beaufort County. About 14.1 percent of Hilton Head Island residents are Hispanic, compared to 11.3 percent of the County's population. African-Americans comprise a relatively small share of the Town's population, at just 7.0 percent compared to 18.2 percent of the Beaufort County population. (See Appendix Table A-4.)

A key demographic trend on Hilton Head Island in the past five years (2011 to 2016) has been a steady increase in the white population, dramatic increases in the Hispanic population, and a decline in the Town's African American population. Between 2011 and 2016, the number of African American residents on Hilton Head declined by an estimated 14.7 percent. During this same time period the populations of white residents increased by 8.2 percent and the number of Hispanic residents increased by 19.3 percent. (See Appendix Table A-3.)

Figure 3. Population Change by Race/Ethnicity, Hilton Head Island, 2011-2016

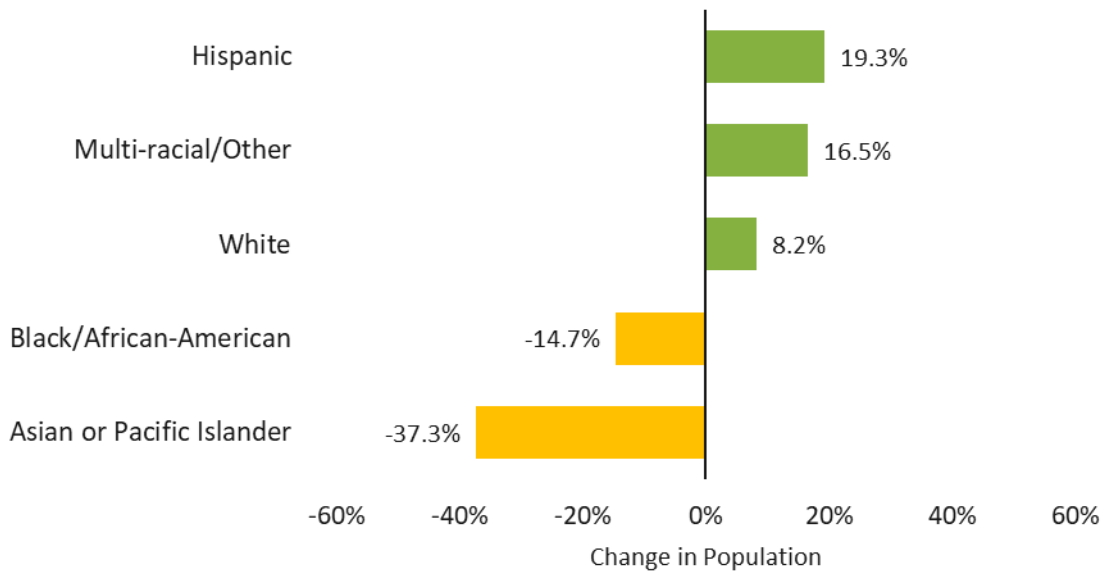Source: U.S. Census Bureau, 2010 decennial Census and American Community Survey

Gullah Population

The low counties along the South Carolina and Georgia coast have long been inhabited by the Gullah-Geechee. The Gullah are descendants of freed slaves; much of their land was initially purchased in the 50 years following the civil war.[iii] Land ownership is core to the preservation of Gullah-Geechee culture. Historically, Gullah land was used for agriculture and for family residences. With the loss of land has come displacement and the erosion of Gullah culture.[iv]

On Hilton Head Island, the loss of heirs' property has been particularly severe, and has accelerated in the last two decades. Prior to the 1950s, the Gullah of Hilton Head Island were nearly the entire population of the Island, and owned a third of the land. By 2000, Gullah individuals owned less than 10 percent of the land and formed less than 10 percent of the population.[v]

Households

According to data from the ACS, the total number of year-round households on Hilton Head Island declined by about one percent between 2011 and 2016. However, due to the Town's population variations over the year, it is more likely that the number of households on Hilton Head Island has not declined but rather has remained relatively stable over the past few years. (See Appendix Table A-6.) The data below on the characteristics of households are based on estimates for year-round residents.

Housing Tenure

In 2016, the homeownership rate on Hilton Head Island was 74.8 percent down from 76.4 percent in 2011 and 77.7 percent in 2000. (See Appendix Table A-13.) While homeownership rates have declined across age groups, the sharpest declines have been among younger households. In particular, the homeownership rate among households on Hilton Head Island headed by someone age 35 to 44—those in prime homebuying ages—remains substantially lower than it was prior to the economic recession and housing market downturn.

This pattern of homeownership rates on Hilton Head Island generally reflects trends experienced in much of the rest of the country. Households in their late 20s and 30s have had a relatively hard time accessing homeownership following the economic downturn and homeownership rates among that population are only just now beginning to rise slowly.

Figure 4. Homeownership Rates by Age of Household Head, Hilton Head Island, 2011 and 2016
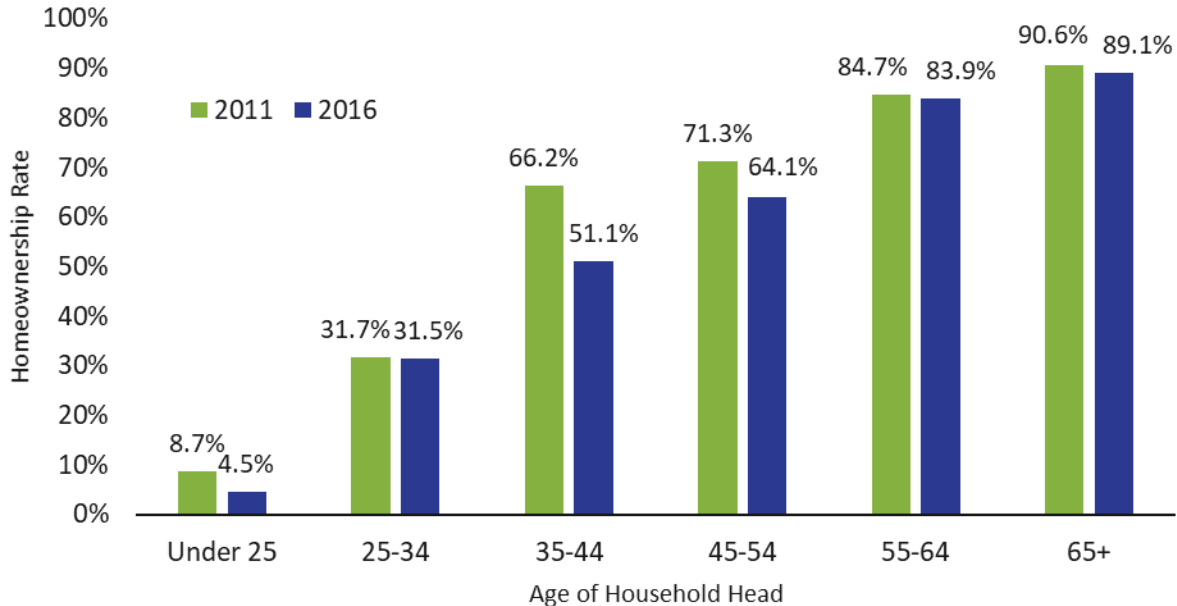
Source: U.S. Census Bureau, American Community Survey

Household Size

Even as the population of Hilton Head Island has increased over the past five years, the number of households has not increased at the same rate, which indicates that the average household size is going up.

In 2011, the average household size on Hilton Head Island was 2.14, with an average of 2.10 persons in owner-occupied households and 2.29 persons in renter-occupied homes. By 2016, the average household size had increased to 2.33, with the biggest increases among renters. Indeed, the fastest growing household type has been among renter households with four or more persons per household, while the number of single-person renter households has declined.

Growing households could be a sign of a growing problem with overcrowding. The *Beaufort County Housing Needs Assessment* found that overcrowding in rental housing is a bigger issue in the Town of Hilton Head Island than it is in other submarkets within the County.[vi]

Larger renter households could reflect two trends:

1) An increase in the Hispanic population who, in general, tend to be more likely to live in larger households and families and

2) An increase in doubling and tripling up to afford to live on Hilton Head Island. While doubling up in shared living arrangements may be more typical in some high-cost resort communities, an increase in the doubling up trend is also occurring nationally.

Figure 5. Average Household Size by Housing Tenure, Hilton Head Island, 2011 and 2016
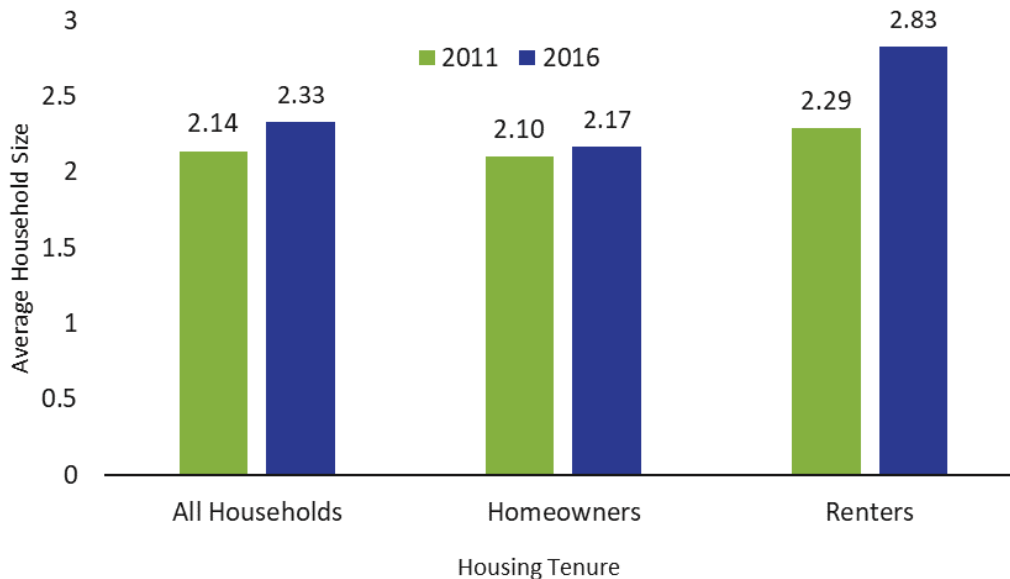
Source: U.S. Census Bureau, American Community Survey

Household Composition

The composition of households and families is changing on Hilton Head Island. The number of married-couple households with children declined by 13.1 percent between 2011 and 2016. During this same time period there has been significant growth in the number of single-parent families (up 48.9 percent between 2011 and 2016). Even with this increase, Hilton Head Island has a smaller share of households with children than does the County overall (17.0 percent versus 23.1 percent). (See Appendix Table A-9.)

The number of households comprised by married couples without children increased by just 1.1 percent over the past five years; however, this household type accounts for nearly half of all of the households on Hilton Head Island (46.1 percent). The next largest share is comprised by older adults (age 65+) living alone who account for 15.1 percent of all households on Hilton Head Island. (See Appendix Table A-9.)

Household Income

Hilton Head Island's median household income was estimated at $70,249 in 2016, significantly higher than the median household income in the City of Beaufort ($46,987) but on par with the median household income in the Town of Bluffton ($67,157).

A key difference is that the median household income for Hilton Head Island declined by an estimated 1.1 percent between 2011 and 2016 while the median household income in Bluffton increased by 16.9 percent over that same time.

In 2016, one in five households (19.1 percent) on Hilton Head Island had a household income of $150,000 or more. This share of higher-income households is substantially higher than in Beaufort County overall (11.6 percent). Hilton Head Island also has a somewhat higher share of households with incomes between $100,000 and $149,999 compared to the County (16.2 percent versus 13.9 percent). (See Appendix Table A-8.)

Despite the number of high-income households residing in the community, the Town of Hilton Head Island also has a significant share of households with relatively low incomes. In 2016, an estimated 16.9 percent of Hilton Head Island households (nearly 3,000 households) had incomes below $25,000. (See Appendix Table A-8.) Households in this income range include both households on fixed incomes (e.g. retirement, disability) as well as individuals and families with workers in a range of industries and occupations that support the local economy.

Figure 6. Household Income, Hilton Head Island, 2016

Pie chart data:
- $150,000+ : 19.1%
- <$25,000 (Household Income) : 16.9% (Percentage of all households)
- $25,000 - $49,999 : 18.8%
- $50,000 - $74,999 : 17.3%
- $75,000 - $99,999 : 11.6%
- $100,000 - $124,999 : 10.0%
- $125,000 - $149,999 : 6.2%

Source: U.S. Census Bureau, American Community Survey
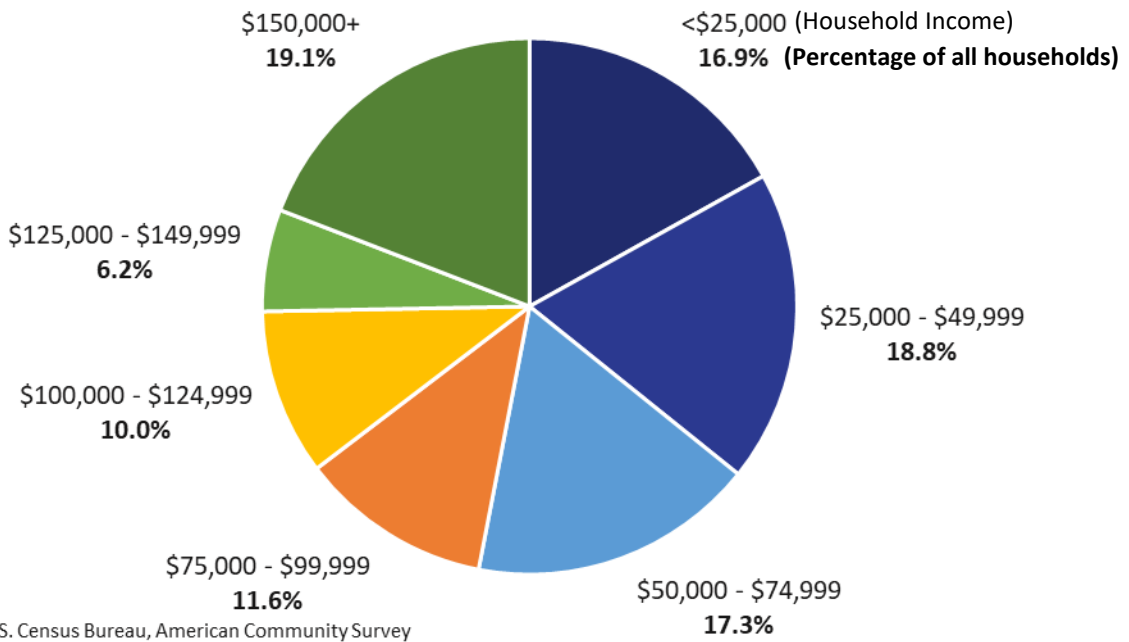
Income Gap

Between 2011 and 2016, the fastest growing income groups on Hilton Head Island were those with incomes below $25,000 (up 13.4 percent) and those with incomes of $150,000 and above (up 13.7 percent). There was a significant hollowing out of middle-income households on the Island. For example, the number of households with incomes between $50,000 and $99,999 declined by more than 10 percent between 2011 and 2016. (See Appendix Table A-7.)

The widening of the household income gap on Hilton Head Island has important implications for housing needs. While demand for housing will continue to be strong from higher-income households, there will be growing demand also from working individuals and families with lower incomes.

Daytime Population
Hilton Head Island's population increases during a typical day as workers commute onto the Island. According to the U.S. Census Bureau, there were an estimated 26,000 jobs on Hilton Head Island in 2016. An estimated 38 percent of those jobs are held by Hilton Head Island residents (9,980) which means that an additional 16,000 individuals come into the Island each day to work, bringing the daytime population to an estimated 55,651 (resident population of 39,651 plus in-commuters totaling 16,000).

As a community with a large resort, retirement and "snowbird" component, there is a considerably higher actual number of persons on the Island during much of the year than what is reported in statistics from the U.S. Census Bureau. It is estimated that 2.67 million visitors come to Hilton Head Island each year.[vii] During the height of tourism season, an estimated 58,000 trips are made onto and off of Hilton Head Island on an average day. [viii]

Employment Trends

The Town of Hilton Head Island is a key economic engine within Beaufort County and the broader metropolitan area. Hilton Head Island has significantly more jobs and employed residents than either the City of Beaufort or Town of Bluffton, and Hilton Head Island has seen several important developments that have expanded its employment base in recent years, including the beginning of construction of a new campus facility for the University of South Carolina, the opening of the 125-suite Ocean Oak Resort, and the Shelter Cove Mall redevelopment project.[ix]

Jobs

There were an estimated 25,944 jobs on Hilton Head Island in 2016, according to the ACS. A substantial share of jobs on Hilton Head Island are visitor/tourist-supporting or resident-supporting (e.g. Accommodation and Food Services, Retail Trade, Arts, Entertainment and Recreation, and Health Care and Social Assistance jobs). Hilton Head Island has a relatively small share of jobs in the Professional and Technical Services Sector (4.3 percent), Finance and Insurance (2.9 percent) and Manufacturing (1.4 percent). (See Appendix Table A-30.)

Figure 7. Employment by Industry, Hilton Head Island, 2016
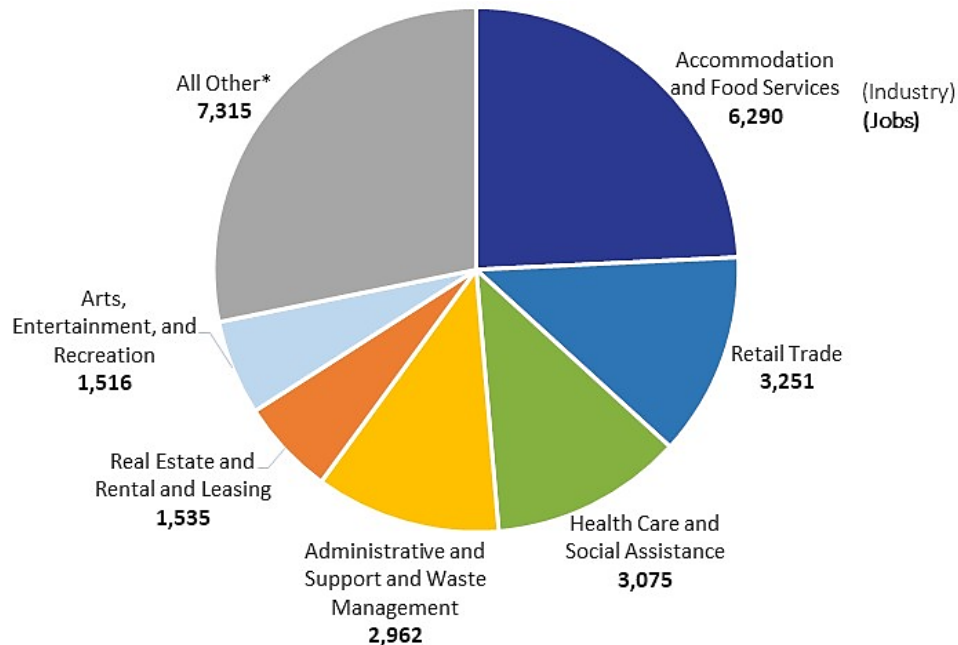
Source: U.S. Census Bureau, Bureau of Labor Statistics.
*Includes teachers, first responders, and state and local government staff.

Assessment of Workforce Housing Needs

The number of jobs on the Island has increased by about two percent over the past five years. The biggest increases have been in the following sectors:

- Accommodation and Food Services (+5.6 percent)
- Administrative and Building Services (+4.4 percent)
- Arts, Entertainment and Recreation (+4.3 percent)

While the Town of Bluffton is a much smaller economy with less than 6,000 jobs, it has added jobs at a significantly faster rate than Hilton Head Island has over the past several years. In particular, overall job growth increased by more than 50 percent in the Town of Bluffton, and there was a dramatic increase in the number of Accommodation and Food Services jobs (+171.3 percent).

Wages

Hilton Head Island will continue to compete for workers in all sectors, but particularly those in the key industries that support the tourism economy and the quality of life of residents. The majority of these workers have wages that, while competitive for the industry, are at levels that make it very challenging to find affordable housing on Hilton Head Island.

Median annual wages for workers in the Accommodation and Food Services, Arts, Entertainment and Recreation, Retail Trade, and Administrative and Support and Waste Management Services are in the $20,000s. Health Care and Social Assistance workers earn higher wages at a median of $50,510 a year.

Figure 8. Median Wages of Jobs in Key Sectors, Hilton Head Island, 2016

Industry	Median Wage ($)	Affordable Rent ($)*	Affordable Homeownership ($)**
Accommodation & Food Services	22,622	566	158,354
Retail Trade	25,993	650	181,951
Arts, Entertainment & Recreation	23,497	587	164,479
Health Care & Social Assistance	50,510	1,263	353,570
Administrative & Support & Waste Management Services	20,850	521	145,950
Construction	28,138	703	196,966
Transportation & Warehousing	41,436	1,036	290,052
Finance & Insurance	51,359	1,284	359,513
Real Estate & Rental & Leasing	46,383	1,160	324,681
Professional, Scientific & Technical Services	49,327	1,233	345,289
Public Administration***	39,361	984	275,527

Source: U.S. Census Bureau, American Community Survey
*Rent affordable to one worker at median wage.
**Home price affordable to two workers at median wage, assuming a home price that is 3.5 times annual household income.
***Includes teachers, first responders, and state and local government staff.

According to data in Figure 8 above, a worker in the Accommodation and Food Services sectors has a typical annual income that means he or she could afford rent of no more than $566 per month. Workers in Arts, Entertainment and Recreation occupations can typically afford no more than $587 per month in rent. A typical Retail Trade worker could afford $650 per month in rent. Homeownership is likely out of reach for most—if not all—workers in these sectors.

Workers in the essential Health Care & Social Assistance sector earn, on average, higher wages that make higher rents and home prices affordable. However, not all workers in the Health Care sector earn wages at this level. The fast-growing and in-demand home health care profession, for example, typically has wages far below those for other health care workers.

Commuting

About 38.5 percent of jobs located on Hilton Head Island are held by residents of the Island. There is no rule of thumb for what share of a community's workers "should" be residents of the community. In part, it depends on the size of the community. For example, about 16.1 percent of the Town of Bluffton's jobs are held by Bluffton residents. However, Bluffton is a much smaller economy and therefore draws from a much larger area for its workforce. Countywide, more than 70 percent of Beaufort County jobs are held by County residents, but the County is a broad geographic area and it is not surprising that the majority of its jobs are held by residents of the County.

Hilton Head Island's peer communities have similar in-commuting patterns. For example, 29.1 percent of jobs in Charleston are held by Charleston residents. About 33.4 percent of jobs located in Wilmington, North Carolina are held by Wilmington residents.

Figure 9. Place of Residence of Hilton Head Island Workers, 2015

Place of Residence	Share of All Workers	Place of Residence	Share of All Workers
Hilton Head Island, SC	38.5%	Town of Ridgeland, SC	1.0%
Town of Bluffton, SC	9.0%	Town of Port Royal, SC	0.8%
City of Hardeeville City, SC	1.0%	Burton Census Designated Place, SC	0.7%
City of Beaufort, SC	1.2%	City of North Charleston, SC	0.6%
City of Charleston, SC	0.9%		
City of Savannah, GA	1.0%	All other places	45.1%

Source: U.S. Census Bureau, On The Map

People who work on Hilton Head Island commute longer distances than those commuting to either the Town of Bluffton or City of Beaufort. About 16.8 percent of workers on Hilton Head Island—or nearly 4,400 workers—commute 50 miles or more each way to get to work. Less than 15 percent of Bluffton workers and less than 12 percent of City of Beaufort workers have such long commutes.

The vast majority of people who work on Hilton Head Island drive alone to work (73.1 percent). Another 15.7 percent of commuters carpool. Less than four percent take public transportation, walk or bike to work (See Appendix Table A-35).

Housing Market Conditions

Hilton Head Island's housing market is atypical as it includes a significant number of units that are occupied on a seasonal basis. According to the Beaufort County Housing Needs Assessment

> [M]uch of the residential inventory in [the Town of Hilton Head Island] is comprised predominantly of gated communities containing single-family and attached owner-occupied condominiums, golf courses and their country clubs and pro shops. Vacation rental properties and resorts are abundant throughout this submarket. (p. IX-17)

Nearly three-quarters of Hilton Head Island is occupied by Planned Unit Developments (PUDs) and over 70 percent of all land on the island is located within a PUD. Most of the PUDs were established before the Town was incorporated and received their development approvals through Beaufort County. These PUDs are master-planned communities with pre-determined densities and lot configurations.

Most of the land within these PUDs is occupied by residential uses (68.7 percent of all PUD land) or open space amenities and golf courses (24.7 percent of all PUD land). There are limited commercial uses within the PUDs (1.3 percent of all PUD land). Land use regulations within the PUDs are governed by legal covenants and master plans specific to each PUD. The types of uses within the PUDs and their relative intensity are important factors in planning efforts on the island, both at the ward-level and island-wide.

According to the U.S. Census Bureau, there were an estimated 33,794 housing units in the Town of Hilton Head Island as of 2016. (See Appendix Table A-12.) In the five years between 2011 and 2016, it is estimated that the Town added 441 net new housing units for an annual growth rate of 0.3 percent. The Town's population increased at a rate more than three times (1.1 percent annually) the rate of housing unit growth over the past five years.

Vacancy

According to data from the U.S. Census Bureau, fully 50 percent—or an estimated 16,880 housing units—on Hilton Head Island are defined as "vacant" without a regular, year-round occupant. By comparison, the housing unit vacancy rate in Beaufort County is 28.8 percent. (See Appendix Table A-24.)

The vast majority of units defined as "vacant" are seasonal vacant units. The U.S. Census Bureau defines "seasonal vacant units" as those that are "intended for occupancy only during certain seasons of the year."

Housing Types

Overall, nearly half (46.8 percent) of the more than 33,000 housing units on Hilton Head Island are single-family detached homes and 42.8 percent are units in multifamily buildings (i.e. buildings with 3+ units). (See Appendix Table A-16.) However, there are significant differences in the characteristics of seasonal housing and year-round occupied housing. More than 60 percent of year-round occupied housing is single-family detached homes and just 28.0 percent are units in multifamily buildings. Thus, the seasonal housing stock includes a relatively greater share of multifamily units (e.g. condominiums).

According to estimates from the ACS, there are nearly 800 mobile or manufactured homes in the Town of Hilton Head Island, accounting for 2.4 percent of all housing units. The majority of mobile and manufactured homes (81.8 percent) are occupied by year-round residents.

Between 2011 and 2016, growth in the Town's housing stock has been driven by increases in new units in multifamily buildings (particularly buildings with between three and 19 units) and townhomes. There was also a stable stock of single-family detached homes on the Island during this same time period. (See Appendix Table A-15.)

Figure 10. Housing Unit Type, Hilton Head Island, 2016
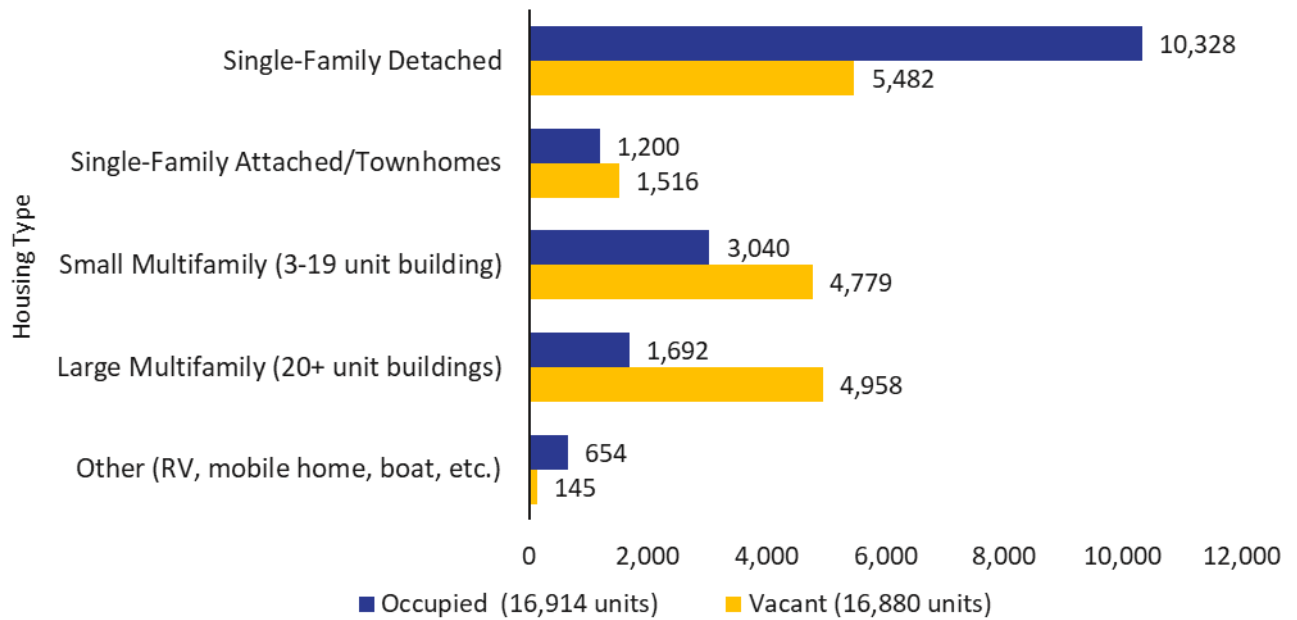
Source: U.S. Census Bureau, American Community Survey

New Construction

According to U.S. Census Bureau data on residential building permits, there were permits issued for a total of 810 new housing units in the Town of Hilton Head Island between 2011 and 2017, or an average of 116 new units per year. All but 46 of these units were single-family homes. This permit data reflects a higher level of new construction activity suggested by ACS data on housing unit growth.

For-Sale Market

Nearly three out of four occupied housing units on Hilton Head Island (74.8 percent) are year-round owner-occupied. The homeownership rate in the Town is somewhat higher than the County homeownership rate (70.5 percent). (See Appendix Table A-14.)

According to a review of listings on Zillow, as of the end of October 2018, there are an estimated 1,305 homes for sale in the Town of Hilton Head Island accounting for about 40 percent of all homes listed for sale in Beaufort County. Nearly 90 percent of the homes for sale on Hilton Head Island (1,173 total listings) are single-family homes while 107 are apartments or condominiums, 23 are townhomes and two are manufactured homes.

Compared with other communities in Beaufort County, the Town of Hilton Head Island has the highest median list price. In addition:

- More than two out of five homes listed for sale (41.1 percent) on Hilton Head Island are priced at $600,000 or above,

- One out of five homes for sale (19.4 percent) is priced at $1,000,000 or higher, and

- While 42.4 percent of all homes listed for sale in Beaufort County are located on Hilton Head Island, about 63 percent of $1,000,000+ homes in the County are on the Island.

Figure 11. Homes Listed for Sale, Hilton Head Island, October 2018

House Type	List Price				
	<$200,000	$200,000 - $399,999	$400,000- $599,999	$600,000+	Total
Single-family detached	158	245	259	511	1,173
Townhome	2	14	1	6	23
Condo/apartment	41	29	19	18	107
Manufactured home	0	1	0	1	2
Total	201	289	279	536	1,305
% of Total	*15.4%*	*22.1%*	*21.4%*	*41.1%*	*100.0%*

Source: Zillow, accessed 10/29/2018

Many working households in Hilton Head Island do not earn enough to buy a home. A household with two full-time workers earning the median wage in the Accommodation and Food Services, Retail Trade, or Arts, Entertainment and Recreation sectors would earn incomes that could allow them to purchase a home priced at no more than $200,000. While these workers comprise nearly half of the Town's employment base, the number of homes listed in this price range account for just 15.4 percent of all homes listed for sale.

Rental Market

As of 2016, there were an estimated 4,260 renter-occupied housing units on Hilton Head Island, an increase of 222 over the number in 2011. (See Appendix Table A-13.) Of the estimated 16,880 vacant units in the Town, 1,662 (9.8 percent) were described by the U.S Census Bureau as being "for rent."

In 2016, the estimated median rent on Hilton Head Island was $1,114 compared to $1,060 for the County as a whole. Rents on Hilton Head Island increased an estimated 4.5 percent between 2015 and 2016, compared to a 4.1 percent increase in Beaufort County.[iii]

A single worker in the Accommodation and Food Services, Retail Trade, or Arts, Entertainment and Recreation sectors would earn an income that could allow him or her to pay no more than $650 per

month in rent. However, the median rent for a one-bedroom apartment on Hilton Head Island is about $900.

According to the ACS, there are an estimated 419 rental units on the Island that have rents below $750, which accounted for less than 10 percent of the total rental housing stock. By comparison, in Beaufort County, 15.7 percent of rental units rent for less than $750 per month. About half of Hilton Head Island's rental units (51.1 percent) have rents between $750 and $1,249 per month. More than 28 percent rent for $1,250 per month or higher. (See Appendix Table A-20.) In order to afford rents of $1,250 per month, a worker would have to earn $50,000, a salary that is significantly higher than most salaries in the Town's tourism-related occupations.

Figure 12. Gross Rent, Hilton Head Island, 2016
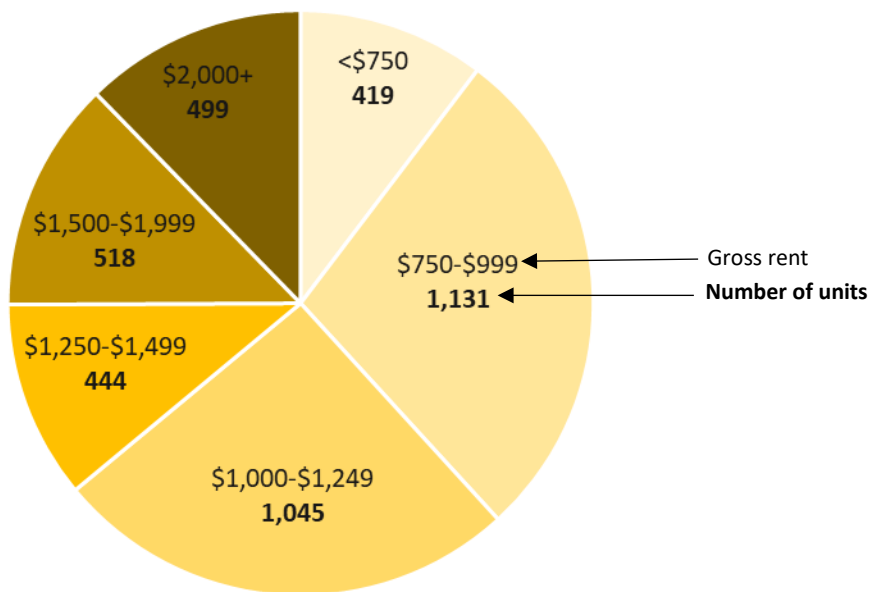
Source: U.S. Census Bureau, American Community Survey

Housing Affordability

How affordable a community is depends on home prices and rents, as well as on the incomes of residents and workers. In general, lower-wage workers will always have a more difficult time finding housing they can afford than will higher-income households. The extent to which there is sufficient housing available and affordable to households all along the income spectrum will dictate how hard it is for working individuals and families to find housing and to be able to live close to where they work if they choose.

A common way to measure housing affordability is to compare household income to monthly housing costs. A rule of thumb is that households should spend no more than 30 percent of their gross income on housing costs. By limiting spending on housing to this level, a typical household is assumed to have enough income left for other necessities, including food, health care, transportation and clothing. Households spending 30 percent or more of their income on housing are often referred to as "cost burdened." Those spending 50 percent or more of their income on housing are often referred to as "severely cost burdened." [x]

In 2016, an estimated 6,573 Hilton Head Island households were cost burdened (39.9 percent), including 3,151 households that were severely cost burdened (19.1 percent). (See Appendix Tables A-25 through 27.)

There are other ways to measure housing affordability. One common measure is to look at a household's combined housing plus transportation costs. Housing costs may be lower further from job centers, but higher transportation costs may erode any savings on housing a household may achieve by moving further out. A rule of thumb is that households should spend no more than 45 percent of their income on combined housing plus transportation costs.[xi]

According to the Center for Neighborhood Technology (CNT) Housing + Transportation Index, the typical working household living on Hilton Head Island spends 43 percent of its income on housing and 24 percent of its income on transportation, far above the 45 percent housing plus transportation threshold. In Hardeeville, Okatie and in unincorporated portions of Beaufort County, housing costs comprise a significantly lower share of household income (24 to 32 percent) but transportation costs are only slightly higher than they are for Hilton Head Island households (25 percent).

Detailed Affordability Analysis

Detailed household data are available for cost burdened households but not for households spending more than 45 percent of income on housing plus transportation. As a result, the following analyses highlight some of the characteristics of Hilton Head Island and Beaufort County households that are housing cost burdened.

- **Renters on Hilton Head Island are more likely than homeowners to be cost burdened.** In 2016, one out of two (49.4 percent or 1,991 households) renters was cost burdened, spending 30 percent or more of their income on housing. Nearly one in four (22.7 percent or 913 households) was severely cost burdened. Rates of housing cost burden among renters declined

modestly from 2011 when 51.8 percent of renters were cost burdened. (See Appendix Table A-26.)

- **Some Hilton Head Island homeowners are also cost burdened.** An estimated 4,582 homeowners (36.8 percent of all homeowners) spent 30 percent or more of their income on housing costs in 2016. This number includes 2,238 homeowners (18.0 percent) who spent 50 percent or more of their income on housing costs. The rate of cost burdened among homeowners has declined from 39.4 percent in 2011. However, throughout Beaufort County, the greatest share of severely cost burdened homeowners live on Hilton Head Island. (See Appendix Table A-25.)

- **Different kind of households face challenges finding housing they can afford. However, the biggest challenges—by far—are among lower-income households.** For example, more than nine out of 10 Hilton Head Island households with incomes below $20,000 are housing cost burdened. (See Appendix Table A-28.) This can include a single, full-time minimum wage worker or a senior or person with a disability living on Social Security. Using standard rules of housing affordability, a household with an income of $20,000 could afford housing costs of no more than $500 a month.

- **About three out of four households with incomes between $20,000 and $34,999 are housing cost burdened.** (See Appendix Table A-28.) Households in this income range include those with two full-time, minimum wage workers or workers in the Accommodation and Food Services, Retail Trade or Arts, Entertainment and Recreation sectors. At an income below $35,000, these households can afford housing that costs no more than $875 per month.

- **Households with higher incomes have an easier time finding housing they can afford on Hilton Head Island; however, many working households are still cost burdened.** For example, more than half (54.8 percent) of households with incomes between $35,000 and $49,999 are cost burdened. (See Appendix Table A-28.) Households with two workers in the Accommodation and Food Services, Retail Trade or Arts, Entertainment and Recreation sectors fall in this income range. Many local employees—including teachers, first responders and Town government employees—also have wages that put them in this income category.

Figure 13. Cost Burdened Households by Household Income, Hilton Head Island, 2016
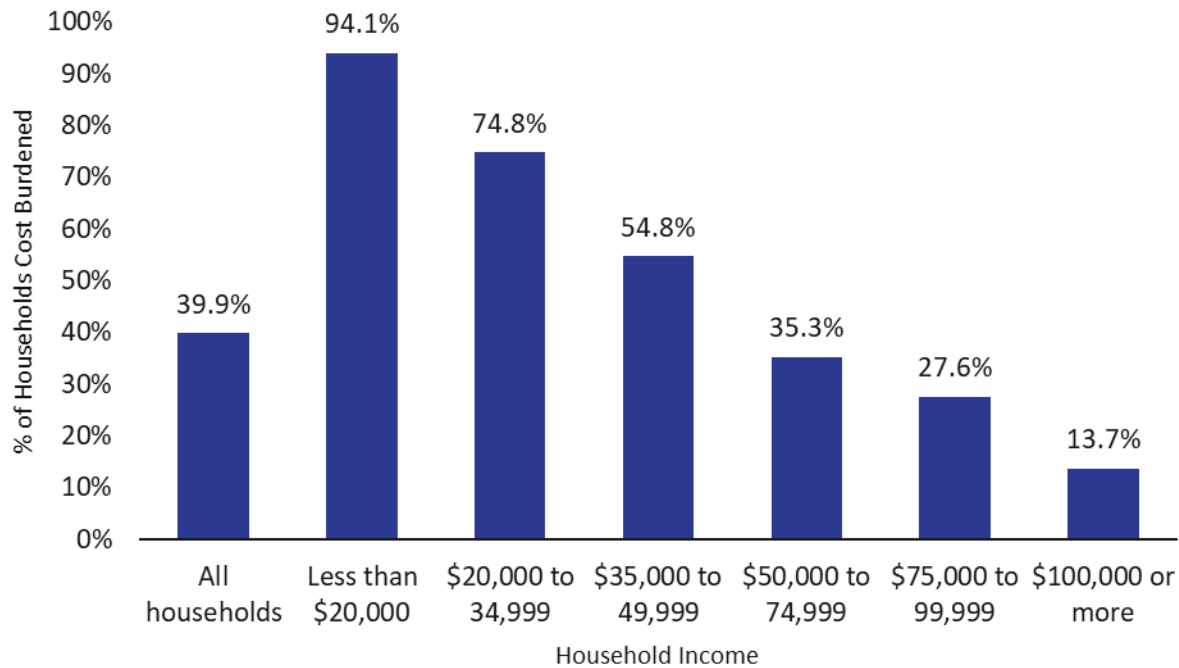
Source: U.S. Census Bureau, American Community Survey

Workforce Housing Needs

According to a survey of Hilton Head Island residents conducted in 2018 as part of the *Beaufort County, South Carolina Housing Needs Assessment*, 58.2 percent said they felt it was difficult to find suitable housing in the area, with affordability/housing costs being listed as the primary driver of the challenge by almost every respondent. [xii] According to the results from this survey, there is widespread interest in meeting the housing needs of workers in several key occupations including those in the education, entry-level/blue collar, and "service"-oriented occupations. This section summarizes the current and future housing needs of workers in the Town of Hilton Head Island.

Current Housing Needs

There is a significant current need for rental housing affordable to working households with incomes below $35,000, meaning homes that have rents of $875 or less. There are currently an estimated 3,166 cost burdened households living on Hilton Head Island with incomes of less than $35,000. Increasing the supply of rental housing with rents of $875 or less could alleviate the current burden among the Island's existing cost burdened population.

In addition, there is a significant need for for-sale housing that is affordable to moderate-income working households. Using a rule of thumb that households spend 3.5 times their annual income on a home, a household earning about $57,000 a year (e.g. two workers in the Accommodation and Food

Services sector) could afford a home priced at no more than $200,000. Currently, only about 15 percent of the homes listed for sale on the Island are priced below $200,000. Increasing the supply of for-sale housing priced below $200,000 could open up homeownership opportunities to current working residents who are priced out.

Future Housing Needs

The *Beaufort County Housing Needs Assessment* provides an estimate of future rental and for-sale housing needed in the Town of Hilton Head (and other submarkets within the County) over the 2017 to 2022 and 2017 to 2027 period to accommodate future population and employment growth. These forecasts can serve as a starting place for assessing future housing demand and planning for the amounts and types of housing that will be needed on Hilton Head Island; however, as noted below, these forecasts may understate the amount of lower-cost housing that future residents and workers will need.

- **The housing forecasts indicate the Town of Hilton Head Island needs to increase housing production significantly to meet future housing demand.** Overall, the forecasts in the County housing needs assessment report suggest that Hilton Head Island needs to add 5,709 net new housing units (both rental and for-sale units) over the 2017 to 2027 period, or an average of 571 net new homes every year for a decade. This is a level of production that far exceeds what the Island has seen in recent years and would require significant shifts in market conditions and/or local regulations and incentives.

- **The need for lower-cost rent housing seems understated in the County report.** According to the forecasts, the Town of Hilton Head Island needs to add 2,105 net new rental units over the next 10 years to accommodate expected demand. An estimated 8.6 percent of those new housing units—or just 181 units—are expected to be needed to have rents of $875 or less. Given the assessment of current housing needs and patterns of wages and employment in the Town, these forecasts of lower-rent units seem low. The biggest rental demand is projected for homes that rent for above $875 per month, including a sizeable share of units with rents of $2,100 or more. Units at these rents would be affordable to households earning at least $84,000.

- **The housing forecasts do not predict a significant increase in for-sale housing affordable to lower-wage working households.** The housing demand forecasts suggest that the Town of Hilton Head Island would need to add 3,604 net new owner-occupied homes between 2017 and 2027. These estimates note that about 15.8 percent of the new for-sale housing needed (570 units) should be priced at or below $200,000. The largest share, by far, is forecasted in the $300,000+ range. Therefore, these forecasts do not suggest needed increases in housing going forward to accommodate growth in the homeownership rate among moderate-wage working households and do not predict significant growth in the availability of first-time homebuyer options.

Figure 14. Future Housing Demand, Hilton Head Island, 2017 to 2027

Rental Housing Demand

		<$500	$500 to $874	$875 to $1,474	$1,475 to $2,099	$2,100+	Total	Annual
				Monthly Rent Levels				
5 years	2017-2022	138	88	414	366	379	1,385	277
5 years	2022-2027	14	-59	239	260	266	720	144
10 years	2017-2027	152	29	653	626	645	2,105	211

For-Sale Housing Demand

		Less than $200,000	$200,000 to $299,999	$300,000+	Total	Annual
			Home Price			
5 years	2017-2022	251	153	922	1,326	265
5years	2022-2027	319	256	1,703	2,278	456
10 years	2017-2027	570	409	2,625	3,604	360

Source: Bowen, Patrick. 2018. Beaufort County, South Carolina Housing Needs Assessment. Bowen National Research, pp. IX-36 to IX-37

Conclusions

The ability for Hilton Head Island to remain a vibrant tourist destination and world-class retirement location is dependent, at least in part, on the ability for workers at all income levels to have access to affordable and appropriately-sized and located housing on the Island.

The results from the County housing demand forecasts for Hilton Head Island, along with this analysis of population, employment and affordability trends, do come together to suggest two conclusions for the Town in terms of a housing strategy going forward.

- First, there is a need to increase the supply of housing in the Island and to identify the obstacles (e.g. financial, regulatory) that could be overcome to help support the sensible development of additional workforce housing.

- Second, there will be a need for housing for individuals and families of all incomes. The market can do a better job of meeting the demand for housing from higher-income households but in order to ensure that low- and moderate-wage working individuals and families can find housing they can afford, the Hilton Head Island community will have to pursue more proactive strategies.

References

[i] 2010 is the last decennial Census which provides the most accurate population counts for Hilton Head Island. Data from the American Community Survey provide the best data on population *characteristics*.

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[vii] Hilton Head Island-Bluffton Chamber of Commerce, https://www.hiltonheadchamber.org/business-resources/press-and-media/fast-facts/, accessed 10/26/2018.

[viii] Murdock, Zach. 2015. Record tourism year brings millions of visitors, dollars to county. The Island Packet, https://www.islandpacket.com/news/business/article34703895.html, accessed 10/26/2018.

[ix] Bowen (2018), p. V-13

[x] Schwartz, Mary and Ellen Wilson. 2007. Who Can Afford To Live in a Home?: A look at data from the 2006 American Community Survey. U.S. Census Bureau, https://www.census.gov/housing/census/publications/who-can-afford.pdf, accessed 10/29/2018.

[xi] CNT, Housing + Transportation Index, https://www.cnt.org/tools/housing-and-transportation-affordability-index

[xii] Bowen (2018), pp. X-22-23.

A-1: Population by Age Group

Town of Hilton Head Island, SC

Population					Percent Change	Percent Change
Age	2000	2010	2011	2016	2000-2010	2011-2016
Under 5	1,502	1,694	1,533	1,440	12.8%	-6.1%
5-17	4,356	4,451	3,912	4,892	2.2%	25.1%
18-24	2,322	2,196	2,265	1,580	-5.4%	-30.2%
25-34	3,985	3,719	3,288	3,494	-6.7%	6.3%
35-44	4,319	3,839	4,204	3,424	-11.1%	-18.6%
45-54	4,533	4,567	4,226	5,409	0.8%	28.0%
55-64	4,695	5,930	6,423	6,187	26.3%	-3.7%
65-74	4,744	5,733	6,185	7,487	20.8%	21.1%
75-84	2,653	3,493	3,533	4,179	31.7%	18.3%
85+	753	1,477	1,489	1,557	96.1%	4.6%
Total Population	**33,862**	**37,099**	**37,058**	**39,651**	**9.6%**	**7.0%**

Source: U.S. Census Bureau, 2000 and 2010 decennial Census Summary File 1 (SF1)

Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011) Table B01002

Share Of Total				
Age	2000	2010	2011	2016
Under 5	4.4%	4.6%	4.1%	3.6%
5-17	12.9%	12.0%	10.6%	12.3%
18-24	6.9%	5.9%	6.1%	4.0%
25-34	11.8%	10.0%	8.9%	8.8%
35-44	12.8%	10.3%	11.3%	8.6%
45-54	13.4%	12.3%	11.4%	13.6%
55-64	13.9%	16.0%	17.3%	15.6%
65-74	14.0%	15.5%	16.7%	18.9%
75-84	7.8%	9.4%	9.5%	10.5%
85+	2.2%	4.0%	4.0%	3.9%
Total Population	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 2000 and 2010 decennial Census Summary File 1 (SF1)

Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011) Table B01002

A-2: Population by Age Group
Select Jurisdictions

2016 Population

Age	Town of Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Under 5	1,440	10,234	11,897
5-17	4,892	24,661	28,881
18-24	1,582	16,360	18,718
25-34	3,494	21,036	25,117
35-44	3,424	18,238	21,722
45-54	5,409	19,034	22,544
55-64	6,187	23,363	27,051
65-74	7,487	26,335	29,021
75-84	4,179	11,576	12,462
85+	1,557	4,479	5,089
Total Population	**39,651**	**175,316**	**202,502**

Source: U.S. Census Bureau, American Community Survey Table B01001

2017 Population Estimates

	Town of Hilton Head Island, SC	City of Beaufort, SC	Town of Bluffton
Population	**40,055**	**13,729**	**21,085**

Source: U.S. Census Bureau, Population Estimates Program

Share of Total

Age	Town of Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Under 18	12.3%	14.1%	14.3%
18-24	4.0%	9.3%	9.2%
25-34	8.8%	12.0%	12.4%
35-44	8.6%	10.4%	10.7%
45-54	13.6%	10.9%	11.1%
55-64	15.6%	13.3%	13.4%
65-74	18.9%	15.0%	14.3%
75-84	10.5%	6.6%	6.2%
85+	3.9%	2.6%	2.5%
Total	**100.0%**	**100.0%**	**100.0%**

A-3: Population by Race and Hispanic Origin

Town of Hilton Head Island, SC

Race and Hispanic Origin	2000	2010	2011	2016	Percent Change 2000-2010	Percent Change 2011-2016
Non-Hispanic	29,976	31,512	32,370	34,058	5.1%	5.2%
White	26,752	27,888	28,301	30,619	4.2%	8.2%
Black/African-American	2,884	2,690	3,270	2,788	-6.7%	-14.7%
Asian or Pacific Islander	182	333	520	326	83.0%	-37.3%
Multi-racial/Other	284	327	279	325	15.1%	16.5%
Hispanic	3,886	5,861	4,688	5,593	50.8%	19.3%
Total Population	**33,862**	**37,099**	**37,058**	**39,651**	**9.6%**	**7.0%**

Source: U.S. Census Bureau, 2000 and 2010 decennial Census Summary File 1 (SF1); U.S. Census Bureau, American Community Survey Table P004; U.S. Census Bureau, 5-Year American Community Survey table B03002

Share of Total				
Race and Hispanic Origin	**2000**	**2010**	**2011**	**2016**
Non-Hispanic	88.5%	84.9%	87.3%	85.9%
White	79.0%	75.2%	76.4%	77.2%
Black/African-American	8.5%	7.3%	8.8%	7.0%
Asian or Pacific Islander	0.5%	0.9%	1.4%	0.8%
Multi-racial/Other	0.8%	0.9%	0.8%	0.8%
Hispanic	11.5%	15.8%	12.7%	14.1%
Total Population	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 2000 and 2010 decennial Census Summary File 1 (SF1); U.S. Census Bureau, American Community Survey Table P004; U.S. Census Bureau, 5-Year American Community Survey table B03002

A-4: Population by Race and Hispanic Origin, 2016
Select Jurisdictions

Race and Hispanic Origin	Town of Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
Non-Hispanic	34,058	155,541	179,075	11919	13525
White	30,619	117,777	128,931	7116	10580
Black/African-American	2,788	31,877	43,795	3912	2072
Asian or Pacific Islander	326	2,166	2,364	232	389
Multi-racial/Other	325	3,189	3,985	659	442
Hispanic	5,593	19,775	23,427	1155	2282
Total Population	**39,651**	**175,316**	**202,502**	**13,074**	**15,765**

Source: U.S. Census Bureau, 5-Year American Community Survey Table B03002

Share of Total

Race and Hispanic Origin	Town of Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
Non-Hispanic	85.89%	88.72%	88.43%	91.17%	85.79%
White	77.22%	67.18%	63.67%	54.43%	67.11%
Black/African-American	7.03%	18.18%	21.63%	29.92%	13.14%
Asian or Pacific Islander	0.82%	1.24%	1.17%	1.77%	2.47%
Multi-racial/Other	0.82%	1.82%	1.97%	5.04%	2.80%
Hispanic	14.11%	11.28%	11.57%	8.83%	14.48%
Total Population	**100%**	**100%**	**100%**	**100%**	**100%**

Source: U.S. Census Bureau, 5-Year American Community Survey Table B03002

A-5: Residential Mobility of the Population, 2016 avg.

Town of Hilton Head Island, SC

	No.	Pct.
Did not move in the last year	32,797	83.2%
Moved in the last year	0	0.0%
Moved within Beafort County	3,366	8.5%
Moved from somewhere else in South Carolina	438	1.1%
Moved from a different state	2,427	6.2%
Moved from abroad	393	1.0%
Total	**39,421**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B07001

A-6: Tenure by Age of Head of Household
Town of Hilton Head Island, SC

	Total Households			Homeowners			Renters			Homeownership Rate		
Age	2000	2011	2016	2000	2011	2016	2000	2011	2016	2000	2011	2016
Under 25	437	299	156	76	26	7	361	273	149	17.4%	8.7%	4.5%
25-34	1,681	1,649	1,477	748	523	465	933	1,126	1,012	44.5%	31.7%	31.5%
35-44	2,226	2,221	1,553	1,473	1,471	794	753	750	759	66.2%	66.2%	51.1%
45-54	2,451	2,370	2,710	1,889	1,689	1,736	562	681	974	77.1%	71.3%	64.1%
55-64	2,593	3,589	3,240	2,337	3,040	2,719	256	549	521	90.1%	84.7%	83.9%
65+	5,020	6,978	7,778	4,668	6,319	6,933	352	659	845	93.0%	90.6%	89.1%
Total Households	**14,408**	**17,106**	**16,914**	**11,191**	**13,068**	**12,654**	**3,217**	**4,038**	**4,260**	**77.7%**	**76.4%**	**74.8%**

Source: U.S. Census Bureau, decennial Census, 5-Year American Community Survey, Table B25007

Share of Total	Total Households			Homeowners			Renters		
Age	2000	2011	2016	2000	2011	2016	2000	2011	2016
Under 25	3.0%	1.7%	0.9%	0.7%	0.2%	0.1%	11.2%	6.8%	3.5%
25-34	11.7%	9.6%	8.7%	6.7%	4.0%	3.7%	29.0%	27.9%	23.8%
35-44	15.4%	13.0%	9.2%	13.2%	11.3%	6.3%	23.4%	18.6%	17.8%
45-54	17.0%	13.9%	16.0%	16.9%	12.9%	13.7%	17.5%	16.9%	22.9%
55-64	18.0%	21.0%	19.2%	20.9%	23.3%	21.5%	8.0%	13.6%	12.2%
65+	34.8%	40.8%	46.0%	41.7%	48.4%	54.8%	10.9%	16.3%	19.8%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, decennial Census, 5-Year American Community Survey, Table B25007

A-7: Household Income

Town of Hilton Head Island, SC

Household Income	2011 (2011 $s)	2016 (2016 $s)	Percent Change
<$25,000	2,524	2,862	13.39%
$25,000 - 49,999	3,469	3,187	-8.13%
$50,000 - 74,999	3,045	2,926	-3.91%
$75,000 - 99,999	2,411	1,962	-18.62%
$100,000 - 124,999	1,690	1,698	0.47%
$125,000 - 149,999	1,118	1,041	-6.89%
$150,000+	2,849	3,238	13.65%
Total Households	**17,106**	**16,914**	**-1.12%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B19001

Share of Total

Household Income	2011 (2011 $s)	2016 (2016 $s)
<$25,000	14.8%	16.9%
$25,000 - 49,999	20.3%	18.8%
$50,000 - 74,999	17.8%	17.3%
$75,000 - 99,999	14.1%	11.6%
$100,000 - 124,999	9.9%	10.0%
$125,000 - 149,999	6.5%	6.2%
$150,000+	16.7%	19.1%
Total Households	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B19001

A-8: Households by Household Income, 2016 (in 2016 $s)

Selected Jurisdictions

Household Income	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
<$25,000	2,862	11,883	14,614	1098	513
$25,000 - 49,999	3,187	16,410	19,741	1356	1297
$50,000 - 74,999	2,926	13,396	14,703	1025	1467
$75,000 - 99,999	1,962	8,496	9,425	385	869
$100,000 - 124,999	1,698	6,157	6,658	356	492
$125,000 - 149,999	1,041	3,192	3,455	120	252
$150,000+	3,238	7,811	8,047	293	609
Total Households	**16,914**	**67,345**	**76,643**	**4,633**	**5,499**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B19001

Share of Total

Household Income	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
<$25,000	16.9%	17.6%	19.1%	23.7%	9.3%
$25,000 - 49,999	18.8%	24.4%	25.8%	29.3%	23.6%
$50,000 - 74,999	17.3%	19.9%	19.2%	22.1%	26.7%
$75,000 - 99,999	11.6%	12.6%	12.3%	8.3%	15.8%
$100,000 - 124,999	10.0%	9.1%	8.7%	7.7%	8.9%
$125,000 - 149,999	6.2%	4.7%	4.5%	2.6%	4.6%
$150,000+	19.1%	11.6%	10.5%	6.3%	11.1%
Total Households	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B19001

A-9: Households by Household Type

Town of Hilton Head Island, SC

Households			Percent
Household Type	2011	2016	Change
Married Couple, w/ Children*	2,083	1,809	-13.15%
Married Couple, w/o Children*	7,707	7,789	1.06%
Single Parent	714	1,063	48.88%
Other Family, w/o Children*	685	605	-11.68%
Living Alone (65+)	2,420	2,561	5.83%
Living Alone (Under 65)	2,319	2,090	-9.87%
Other Non-Family, Not Living Alone	1,178	1,002	-14.94%
Total Households	**17,106**	**16,914**	**-1.12%**

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

Share of Total		
Household Type	2011	2016
Married Couple, w/ Children*	12.2%	10.7%
Married Couple, w/o Children*	45.1%	46.1%
Single Parent	4.2%	6.3%
Other Family, w/o Children*	4.0%	3.6%
Living Alone (65+)	14.1%	15.1%
Living Alone (Under 65)	13.6%	12.4%
Other Non-Family, Not Living Alone	6.9%	5.9%
Total Households	**100.0%**	**100.0%**

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

A-10: Households by Household Type, 2016

Town of Hilton Head Island, SC

Household Type	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Married Couple, w/ Children*	1,809	10,081	11,419
Married Couple, w/o Children*	7,789	26,516	29,518
Single Parent	1,063	5,469	6,595
Other Family, w/o Children*	605	3,727	4,959
Living Alone (65+)	2,561	8,340	11,085
Living Alone (Under 65)	2,090	9,590	9,105
Other Non-Family, Not Living Alone	1,002	3,622	3,962
Total Households	**16,914**	**67,345**	**76,643**

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

Share of Total

Household Type	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Married Couple, w/ Children*	10.7%	15.0%	14.9%
Married Couple, w/o Children*	46.1%	39.4%	38.5%
Single Parent	6.3%	8.1%	8.6%
Other Family, w/o Children*	3.6%	5.5%	6.5%
Living Alone (65+)	15.1%	12.4%	14.5%
Living Alone (Under 65)	12.4%	14.2%	11.9%
Other Non-Family, Not Living Alone	5.9%	5.4%	5.2%
Total Households	**100.0%**	**100.0%**	**100.0%**

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

A-11: Year Moved into Current Home by Age of Household Head, 2016

Town of Hilton Head Island, SC

Year	Age of Household Head		
	Under 35	**35 to 64**	**65 and Older**
2015 or later	7	281	136
2010 to 2014	252	1,539	1,218
2000 to 2009	201	2,119	2,946
1990 to 1999	0	929	1,939
1980 to 1989	12	333	524
1979 or earlier	0	48	170
Total Households	**472**	**5,249**	**6,933**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25128

Share of Total

Year	Age of Household Head		
	Under 35	**35 to 64**	**65 and Older**
2015 or later	1.5%	5.4%	2.0%
2010 to 2014	53.4%	29.3%	17.6%
2000 to 2009	42.6%	40.4%	42.5%
1990 to 1999	0.0%	17.7%	28.0%
1980 to 1989	2.5%	6.3%	7.6%
1979 or earlier	0.0%	0.9%	2.5%
Total Households	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25128

A-12: Housing Units
Select Jurisdictions

	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
2000	24,647	60,509	
2010	32,060	93,023	
2011	33,353	91,430	
2012	33,388	92,373	
2013	33,333	92,872	103,280
2014	33,602	93,480	104,060
2015	33,827	93,858	104,587
2016	33,794	94,631	105,555
Annual Percent Change			
2000-2010	3.0%	5.4%	-%
Annual Percent Change			
2010-2016	0.2%	0.2%	-%

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25001

U.S. Census Bureau, 2000 Summary File 1 (SF 1) 100-Percent Data Table H002

A-13: Housing Tenure

Hilton Head Island, SC

Tenure	2011 No.	Pct.	2016 No.	Pct.		Change	Pct Chg.
Renter-Occupied	4,038	23.6%	4,260	25.2%		222	5.5%
Owner-Occupied	13,068	76.4%	12,654	74.8%		-414	-3.2%
Total Occupied Units	**17,106**	**100.0%**	**16,914**	**100.0%**		**-192**	**-1.1%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25003

A-14: Housing Tenure, 2016

Select Jurisdictions

Tenure	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Renter-Occupied	4,260	19,862	22,745
Owner-Occupied	12,654	47,483	53,898
Total Occupied Units	**16,914**	**67,345**	**76,643**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25003

Share of Total

Tenure	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Renter-Occupied	25.2%	29.5%	29.7%
Owner-Occupied	74.8%	70.5%	70.3%
Total Occupied Units	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25003

A-15: Housing Type

Hilton Head Island, SC

Type	2011		2016			Change	Pct. Change
	No.	Pct.	No.	Pct.		Change	Pct. Change
Single-Family Detached	15,835	47.5%	15,810	46.8%		-25	-0.2%
Single-Family Attached/Townhomes*	2,588	7.8%	2,716	8.0%		128	4.9%
Small Multifamily (3-19 unit building)	6,805	20.4%	7,819	23.1%		1,014	14.9%
Large Multifamily (20+ unit buildings)	7,050	21.1%	6,650	19.7%		-400	-5.7%
Other (RV, mobile home, boat, etc.)	1,075	3.2%	799	2.4%		-276	-25.7%
Total Units	**33,353**	**100.0%**	**33,794**	**100.0%**		**441**	**1.3%**

*Includes attached homes and duplexes

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25024

A-16: Housing Type, 2016

Select Jurisdictions

Type	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
Single-Family Detached	15,810	58,151	64,157	3765	4717
Single-Family Attached/Townhomes*	2,716	6,445	6,592	518	1019
Small Multifamily (3-19 unit building)	7,819	13,254	14,114	957	391
Large Multifamily (20+ unit buildings)	6,650	8,504	8,817	314	90
Other (RV, mobile home, boat, etc.)	799	8,277	11,875	147	105
Total Units	**33,794**	**94,631**	**105,555**	**5,701**	**6,322**

*Includes attached homes and duplexes

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25024

Share of Total

Type	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA	City of Beaufort, SC	Town of Bluffton, SC
Single-Family Detached	46.8%	61.5%	60.8%	66.0%	74.6%
Single-Family Attached/Townhomes*	8.0%	6.8%	6.2%	9.1%	16.1%
Small Multifamily (3-19 unit building)	23.1%	14.0%	13.4%	16.8%	6.2%
Large Multifamily (20+ unit buildings)	19.7%	9.0%	8.4%	5.5%	1.4%
Other (RV, mobile home, boat, etc.)	2.4%	8.7%	11.3%	2.6%	1.7%
Total Units	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

*Includes attached homes and duplexes

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25024

A-17: Housing Units by Number of Bedrooms

Hilton Head Island, SC

Number of Bedrooms	2011 No.	2011 Pct.	2016 No.	2016 Pct.	Change	Pct Chg.
No Bedrooms / Studio	1,046	3.1%	500	1.5%	-546	-52.2%
1 Bedroom	2,971	8.9%	2,572	7.6%	-399	-13.4%
2 Bedrooms	10,410	31.2%	11,728	34.7%	1,318	12.7%
3 Bedrooms	12,756	38.2%	12,656	37.5%	-100	-0.8%
4 Bedrooms	4,590	13.8%	4,813	14.2%	223	4.9%
5+ Bedrooms	1,580	4.7%	1,525	4.5%	-55	-3.5%
Total Housing Units	**33,353**	**100.0%**	**33,794**	**100.0%**	**441**	**1.3%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25041

A-18 Housing Units by Number of Bedrooms, 2016

Select Jurisdictions

Number of Bedrooms	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
No Bedrooms / Studio	500	969	1,042
1 Bedroom	2,572	5,332	6,080
2 Bedrooms	11,728	27,336	30,138
3 Bedrooms	12,656	43,642	49,420
4 Bedrooms	4,813	13,896	15,269
5+ Bedrooms	1,525	3,456	3,606
Total Housing Units	**33,794**	**94,631**	**105,555**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25041

Share of Total

	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
No Bedrooms / Studio	1.5%	1.0%	1.0%
1 Bedroom	7.6%	5.6%	5.8%
2 Bedrooms	34.7%	28.9%	28.6%
3 Bedrooms	37.5%	46.1%	46.8%
4 Bedrooms	14.2%	14.7%	14.5%
5+ Bedrooms	4.5%	3.7%	3.4%
Total	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25041

A-19: Housing Units by Gross Rent
Renter-Occupied Units
Hilton Head Island, SC

Gross Rent	2011 No.	2011 Pct.	2016 No.	2016 Pct.	Change	Pct Chg.
<$750	553	13.7%	419	9.8%	-134	-24.2%
$750-999	944	23.4%	1,131	26.5%	187	19.8%
$1,000-1,249	830	20.6%	1,045	24.5%	215	25.9%
$1,250-1,499	591	14.6%	444	10.4%	-147	-24.9%
$1,500-1,999	511	12.7%	518	12.2%	7	1.4%
$2,000+	470	11.6%	499	11.7%	29	6.2%
Occupied without Rent	139	3.4%	204	4.8%	65	46.8%
Total Renter-Occupied Housing Units	**4,038**	**100.0%**	**4,260**	**100.0%**	**222**	**5.5%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25063

A-20: Housing Units by Gross Rent, 2016
Selected Jurisdictions
Renter-Occupied Units

Gross Rent	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
<$750	419	3,118	4,082
$750-999	1,131	5,111	6,108
$1,000-1,249	1,045	4,868	5,234
$1,250-1,499	444	2,152	2,309
$1,500-1,999	518	2,224	2,290
$2,000+	499	1,333	1,404
Occupied without Rent	204	1,056	1,318
Total Renter-Occupied Housing Units	**4,260**	**19,862**	**22,745**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25063

Share of Total

Gross Rent	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
<$750	9.8%	15.7%	17.9%
$750-999	26.5%	25.7%	26.9%
$1,000-1,249	24.5%	24.5%	23.0%
$1,250-1,499	10.4%	10.8%	10.2%
$1,500-1,999	12.2%	11.2%	10.1%
$2,000+	11.7%	6.7%	6.2%
Occupied without Rent	4.8%	5.3%	5.8%
Total Renter-Occupied Housing Units	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25063

A-21: Housing Units by Home Value

Hilton Head Island, SC
Owner-Occupied Units

Home Value	2011		2016			Change	Pct Chg.
	No.	Pct.	No.	Pct.			
<$200,000	1,895	14.5%	2,028	16.0%		133	7.0%
$200,000-299,999	1,129	8.6%	1,504	11.9%		375	33.2%
$300,000-399,999	1,586	12.1%	1,966	15.5%		380	24.0%
$400,000-499,999	2,260	17.3%	1,776	14.0%		-484	-21.4%
$500,000-749,999	3,202	24.5%	2,960	23.4%		-242	-7.6%
$750,000-$999,999	1,436	11.0%	1,222	9.7%		-214	-14.9%
$1,000,000+	1,560	11.9%	1,198	9.5%		-362	-23.2%
Total Owner-Occupied Housing Units	**13,068**	**100.0%**	**12,654**	**100.0%**		**-414**	**-3.2%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25075

A-22: Housing Units by Home Value, 2016
Selected Jurisdictions
Owner-Occupied Units

Home Value	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
<$200,000	2,028	16,435	21,071
$200,000-299,999	1,504	9,890	10,690
$300,000-399,999	1,966	6,398	6,962
$400,000-499,999	1,776	4,100	4,269
$500,000-749,999	2,960	5,934	6,122
$750,000-$999,999	1,222	2,226	2,239
$1,000,000+	1,198	2,500	2,545
Total Owner-Occupied Housing Units	**12,654**	**47,483**	**53,898**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25075

Share of Total

	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
<$200,000	16.0%	34.6%	39.1%
$200,000-299,999	11.9%	20.8%	19.8%
$300,000-399,999	15.5%	13.5%	12.9%
$400,000-499,999	14.0%	8.6%	7.9%
$500,000-749,999	23.4%	12.5%	11.4%
$750,000-$999,999	9.7%	4.7%	4.2%
$1,000,000+	9.5%	5.3%	4.7%
Total Owner-Occupied Housing Units	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25075

A-23: Housing Units by Year Built, 2016

Select Jurisdictions

Year Built	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
2014 or Later	138	578	681
2010 to 2013	230	2,259	3,007
2000 to 2009	4,759	28,317	31,122
1990 to 1999	6,085	20,445	23,101
1980 to 1989	13,436	22,230	23,730
1970 to 1979	7,874	12,450	13,760
1960 to 1969	924	3,637	4,322
1950 to 1959	245	3,024	3,589
1940 to 1949	50	667	933
Before 1940	53	1,024	1,310
Total Housing Units	**33,794**	**94,631**	**105,555**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25034

Share of Total

Year Built	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
2014 or Later	0.4%	0.6%	0.6%
2010 to 2013	0.7%	2.4%	2.8%
2000 to 2009	14.1%	29.9%	29.5%
1990 to 1999	18.0%	21.6%	21.9%
1980 to 1989	39.8%	23.5%	22.5%
1970 to 1979	23.3%	13.2%	13.0%
1960 to 1969	2.7%	3.8%	4.1%
1950 to 1959	0.7%	3.2%	3.4%
1940 to 1949	0.1%	0.7%	0.9%
Before 1940	0.2%	1.1%	1.2%
Total Housing Units	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25034

A-24: Vacancy Housing Units Reason

Select Jurisdictions

Vacant Housing Units	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
For rent	1,662	2,956	3,144
Rented, not occupied	141	278	322
For sale only	336	1,106	1,134
Sold, not occupied	135	481	481
Seasonal	14,061	20,076	20,532
Other	515	2,389	3,299
Total	**16,880**	**27,286**	**28,912**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25041

Share of Total

	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
For rent	9.8%	10.8%	10.9%
Rented, not occupied	0.8%	1.0%	1.1%
For sale only	2.0%	4.1%	3.9%
Sold, not occupied	0.8%	1.8%	1.7%
Seasonal	83.3%	73.6%	71.0%
Other	3.1%	8.8%	11.4%
Total	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25041

A-25: Housing Costs as a Percent of Household Income
Owner Households
Hilton Head Island, SC

Owner Households	2011	2016
<30%	7,865	7,855
30-49%	2,940	2,344
50%+	2,170	2,238
Total Owner Households	**12,975**	**12,437**

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25091

Share of Owner Households	2011	2016
<30%	60.6%	63.2%
30-49%	22.7%	18.8%
50%+	16.7%	18.0%
Total Owner Households	**100.0%**	**100.0%**

*added housing units with a mortgage and without mortgage

*did not include the data that was 'Not computed"

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25091

A-26: Housing Costs as a Percent of Household Income

Renter Households

Hilton Head Island, SC

Renter Households	2011	2016
<30%	1,841	2,039
30-49%	1,098	1,078
50%+	881	913
Total Renter Households	**3,820**	**4,030**

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25070

Share of Renter Households	2011	2016
<30%	48.2%	50.6%
30-49%	28.7%	26.7%
50%+	23.1%	22.7%
Total Renter Households	**100.0%**	**100.0%**

*Did not include the data that was 'Not computed"

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25070

A-27: Cost Burdened Households, 2016

Select Jurisdictions

Number of Households that are Cost Burdened

	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Owner Households	4582	15,290	17009
Renter Households	1991	9,254	10555
Total Households	**6,573**	**24,544**	**27,564**

Source: U.S. Census Burea, 5-Year American Community Survey, Tables B25070

Source: U.S. Census Burea, 5-Year American Community Survey, Tables B25092

Percent of Households that are Cost Burdened

	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Owner Households	69.7%	62.3%	61.7%
Renter Households	30.3%	37.7%	38.3%
Total Households	**100%**	**100%**	**100.0%**

Source: U.S. Census Burea, 5-Year American Community Survey, Tables B25070

Source: U.S. Census Burea, 5-Year American Community Survey, Tables B25092

A-28: Housing Costs as a Percent of Household Income by Household Income, 2016 (2016 $s)

All Households

Hilton Head Island, SC

All Households	Total Households		<30%		30-49%		50%+	
Household Income	No.	%	No.	%	No.	%	No.	%
Less than $20,000	1,785	10.8%	106	1.1%	278	8.1%	1,401	44.5%
$20,000 to 34,999	1,989	12.1%	502	5.1%	703	20.5%	784	24.9%
$35,000 to 49,999	1,880	11.4%	850	8.6%	680	19.9%	350	11.1%
$50,000 to 74,999	2,900	17.6%	1,877	19.0%	664	19.4%	359	11.4%
$75,000 to 99,999	1,953	11.9%	1,414	14.3%	428	12.5%	111	3.5%
$100,000 or more	5,960	36.2%	5,145	52.0%	669	19.5%	146	4.6%
Total Households	**16,467**	**100.0%**	**9,894**	**100.0%**	**3,422**	**100.0%**	**3,151**	**100.0%**

*An estimated 447 is not computed

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25074

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25095

Beaufort County, SC

All HouseHolds	Total Households		<30%		30-49%		50%+	
Household Income	No.	%	No.	%	No.	%	No.	%
Less than $20,000	7,513	11.5%	910	2.2%	1,703	12.0%	4,900	47.4%
$20,000 to 34,999	10,119	15.5%	3,396	8.3%	3,582	25.2%	3,141	30.4%
$35,000 to 49,999	8,953	13.7%	4,501	11.0%	3,373	23.8%	1,079	10.4%
$50,000 to 74,999	13,272	20.3%	9,529	23.3%	2,960	20.8%	783	7.6%
$75,000 to 99,999	8,409	12.9%	6,697	16.4%	1,452	10.2%	260	2.5%
$100,000 or more	17,094	26.2%	15,783	38.7%	1,129	8.0%	182	1.8%
Total Households	**65,360**	**100.0%**	**40,816**	**100.0%**	**14,199**	**100.0%**	**10,345**	**100.0%**

*An estimated 447 is not computed

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25074

Source: U.S. Census Burea, 5-Year American Community Survey, Table B25095

A-29: Jobs By Sector

Job Located in the Town of Hilton Head Island, SC

Jobs by NAICS Industry Sector								Annual Pct	Annual Pct
Sector	2005	2010	2011	2012	2013	2014	2015	2005-2010	2010-2015
Agriculture, Forestry, Fishing, and Hunting	132	35	47	47	46	40	39	-7.3%	2.3%
Mining, Quarrying, And Oil and Gas	2	-	-	-	-	1	1	-10.0%	0.0%
Utilities	126	107	104	94	98	116	103	-1.5%	-0.7%
Construction	1,874	898	898	770	722	897	850	-5.2%	-1.1%
Manufacturing	316	258	223	252	245	246	288	-1.8%	2.3%
Wholesale Trade	430	344	346	283	268	287	248	-2.0%	-5.6%
Retail Trade	2,721	2,662	2,881	2,781	2,687	2,720	2,586	-0.2%	-0.6%
Transportation and Warehousing	324	260	183	156	200	176	149	-2.0%	-8.5%
Information	491	569	546	256	192	190	192	1.6%	-13.3%
Finance and Insurance	622	513	553	573	639	614	607	-1.8%	3.7%
Real Estate and Rental and Leasing	1,158	1,318	1,319	1,338	1,287	1,343	1,221	1.4%	-1.5%
Professional, Scientific, and Technical Services	1,234	999	1,053	999	818	801	897	-1.9%	-2.0%
Management of Companies and Enterprises	366	396	444	817	797	854	843	0.8%	22.6%
Administrative and Support and Waste Management	2,164	1,929	2,061	2,352	2,409	2,303	2,356	-1.1%	4.4%
Educational Services	272	293	310	403	369	409	325	0.8%	2.2%
Health Care and Social Assistance	2,092	2,372	2,033	1,976	2,008	2,265	2,446	1.3%	0.6%
Arts, Entertainment, and Recreation	1,349	994	968	907	953	951	1,206	-2.6%	4.3%
Accommodation and Food Services	4,244	3,905	4,403	4,535	4,637	4,771	5,003	-0.8%	5.6%
Other Services (except Public Administration)	1,679	899	883	1,001	1,083	1,069	986	-4.6%	1.9%
Public Administration	316	312	337	328	329	297	290	-0.1%	-1.4%
Total	**21,912**	**19,063**	**19,592**	**19,868**	**19,787**	**20,350**	**20,636**	**-1.3%**	**1.7%**

Source: U.S. Census Bureau, On The Map. "Primary" jobs in the Town of Hilton Head Island, SC

A-30: Jobs By Sector

Job Located in the Town of Hilton Head Island, SC

Share of Total

Sector	2000	2010	2011	2012	2013	2014	2015
Agriculture, Forestry, Fishing, and Hunting	0.6%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Mining, Quarrying, And Oil and Gas	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Utilities	0.6%	0.6%	0.5%	0.5%	0.5%	0.6%	0.5%
Construction	8.6%	4.7%	4.6%	3.9%	3.6%	4.4%	4.1%
Manufacturing	1.4%	1.4%	1.1%	1.3%	1.2%	1.2%	1.4%
Wholesale Trade	2.0%	1.8%	1.8%	1.4%	1.4%	1.4%	1.2%
Retail Trade	12.4%	14.0%	14.7%	14.0%	13.6%	13.4%	12.5%
Transportation and Warehousing	1.5%	1.4%	0.9%	0.8%	1.0%	0.9%	0.7%
Information	2.2%	3.0%	2.8%	1.3%	1.0%	0.9%	0.9%
Finance and Insurance	2.8%	2.7%	2.8%	2.9%	3.2%	3.0%	2.9%
Real Estate and Rental and Leasing	5.3%	6.9%	6.7%	6.7%	6.5%	6.6%	5.9%
Professional, Scientific, and Technical Services	5.6%	5.2%	5.4%	5.0%	4.1%	3.9%	4.3%
Management of Companies and Enterprises	1.7%	2.1%	2.3%	4.1%	4.0%	4.2%	4.1%
Administrative and Support and Waste Management	9.9%	10.1%	10.5%	11.8%	12.2%	11.3%	11.4%
Educational Services	1.2%	1.5%	1.6%	2.0%	1.9%	2.0%	1.6%
Health Care and Social Assistance	9.5%	12.4%	10.4%	9.9%	10.1%	11.1%	11.9%
Arts, Entertainment, and Recreation	6.2%	5.2%	4.9%	4.6%	4.8%	4.7%	5.8%
Accommodation and Food Services	19.4%	20.5%	22.5%	22.8%	23.4%	23.4%	24.2%
Other Services (except Public Administration)	7.7%	4.7%	4.5%	5.0%	5.5%	5.3%	4.8%
Public Administration	1.4%	1.6%	1.7%	1.7%	1.7%	1.5%	1.4%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, On The Map. "Primary" jobs in the Town of Hilton Head Island, SC

A-31: Median Earnings

Select Jurisdictions

Workers by Place of Work

Median earnings (dollars)	Hilton Head Island, SC	Beafort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
2011	31,527	34,841	28198*
2016	31,924	36,688	31,407

*Civilian employed population 16 years and over with earnings

* MSA oldest record is for the 2013-2009 5-Year Survey

Source: U.S. Census Bureau, 5-Year American Community Survey, Table S2418

A-32: Workers By Age Group
That Hold Jobs in the Town of Hilton Head Island, SC

Workers					Share of Total				
Year	Under 30	30 to 54	55+	Total	Year	Under 30	30 to 54	55+	Total
2002	6,151	12,185	3,635	**21,971**	2002	28.0%	55.5%	16.5%	**100.0%**
2003	5,893	11,820	3,888	**21,601**	2003	27.3%	54.7%	18.0%	**100.0%**
2004	6,041	11,893	4,188	**22,122**	2004	27.3%	53.8%	18.9%	**100.0%**
2005	6,032	11,593	4,287	**21,912**	2005	27.5%	52.9%	19.6%	**100.0%**
2006	6,125	11,359	4,426	**21,910**	2006	28.0%	51.8%	20.2%	**100.0%**
2007	6,147	11,489	4,712	**22,348**	2007	27.5%	51.4%	21.1%	**100.0%**
2008	5,875	11,003	4,676	**21,554**	2008	27.3%	51.0%	21.7%	**100.0%**
2009	4,742	10,397	4,467	**19,606**	2009	24.2%	53.0%	22.8%	**100.0%**
2010	4,600	10,089	4,397	**19,086**	2010	24.1%	52.9%	23.0%	**100.0%**
2011	4,694	10,175	4,723	**19,592**	2011	24.0%	51.9%	24.1%	**100.0%**
2012	4,587	10,352	4,929	**19,868**	2012	23.1%	52.1%	24.8%	**100.0%**
2013	4,541	10,180	5,066	**19,787**	2013	22.9%	51.4%	25.6%	**100.0%**
2014	4,694	10,250	5,406	**20,350**	2014	23.1%	50.4%	26.6%	**100.0%**
2015	4,742	10,354	5,540	**20,636**	2015	23.0%	50.2%	26.8%	**100.0%**

Source: U.S. Census Bureau, On The Map. "Primary" jobs in the Town of Hilton Head Island, SC

A-33: Place of Residence for Workers, 2014
Select Jurisdictions

Place of Work Place of Residence	Hilton Head Island, SC		Beaufort City, SC		Town of Bluffton, SC	
	# of Workers	Share of Workers	# of Workers	Share of Workers	# of Workers	Share of Workers
Hilton Head Island, SC	7,943	38.5%	625	5.3%	537	10.0%
Town of Bluffton, SC	1,861	9.0%	574	4.9%	860	16.1%
Hardeeville City, SC	214	1.0%			117	2.2%
Beaufort City, SC	244	1.2%	1,498	12.7%		0.0%
Charleston City, SC	194	0.9%	104	0.9%		
Savannah City, GA	213	1.0%		0.0%	143	2.7%
Ridgeland Town, SC	207	1.0%	69	0.6%	57	1.1%
Port Royal Town, SC	167	0.8%	831	7.0%	76	1.4%
Burton CDP, SC	153	0.7%	680	5.7%	84	1.6%
North Charleston City, SC	134	0.6%	100	0.8%		
Laurel Bay CDP, SC		0.0%	293	2.5%	58	1.1%
Shell Point CDP, SC		0.0%	266	2.2%		
Pooler City, GA		0.0%			34	0.6%
All other locations	9,306	45.1%	6,791	57.4%	3,386	63.3%
Total	**20,636**	**100.0%**	**11,831**	**100.0%**	**5,352**	**100.0%**

*Filled in Top 10, empty spaces fell into "All other locations"

Source: U.S. Census Bureau, On The Map

A-34: Place of Work for Residents, 2014

Select Jurisdictions

Place of Residence Place of Work	Hilton Head Island, SC		Beaufort City, SC		Town of Bluffton, SC	
	# of Workers	Share of Workers	# of Workers	Share of Workers	# of Workers	Share of Workers
Hilton Head Island, SC	7,943	59.5%	244	5.8%	1,861	33.7%
Town of Bluffton, SC	537	4.0%	106	2.5%	860	15.6%
Savannah City, GA	305	2.3%	75	1.8%	233	4.2%
Beaufort City, SC	625	4.7%	1,498	35.9%		
Charleston City, SC	227	1.7%	88	2.1%	57	1.0%
North Charleston City, SC	221	1.7%	105	2.5%	72	1.3%
Columbia City, SC	213	1.6%	76	1.8%	62	1.1%
Greenville City, SC	98	0.7%	46	1.1%	34	0.6%
Mount Pleasant Town, SC	70	0.5%				
Summerville Town, SC	55	0.4%				
Burton CDP, SC			152	3.6%		
Port Royal town, SC			225	5.4%		
Hardeeville City, SC					105	1.9%
Ridgeland Town, SC					50	0.9%
All other locations	3,047	22.8%	1,561	37.4%	2,191	39.7%
Total	**13,341**	**100.0%**	**4,176**	**100.0%**	**5,525**	**100.0%**

*Filled in Top 10, empty spaces fell into "All other locations"

Source: U.S. Census Bureau, On The Map

A-35: Mode of Commute to Work for Workers over 16 Years Old, 2016
Select Jurisdictions by **Place of Work**

Workers by Place of Work

Mode	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Drove alone	18,959	59,887	66,052
Carpooled	4,062	10,033	11,275
Public Transportation	307	446	452
Bicycled	248	436	503
Walked	341	1,945	2,297
Other	347	1,447	1,586
Worked at Home	1,680	5,193	5,775
Total	**25,944**	**79,387**	**87,940**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B08406

As a Share of Total

Mode	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Drove alone	73.1%	75.4%	75.1%
Carpooled	15.7%	12.6%	12.8%
Public Transportation	1.2%	0.6%	0.5%
Bicycled	1.0%	0.5%	0.6%
Walked	1.3%	2.5%	2.6%
Other	1.3%	1.8%	1.8%
Worked at Home	6.5%	6.5%	6.6%
Total	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B08406

A-36: Mode of Commute to Work for Workers over 16 Years Old, 2016
Select Jurisdictions by **Place of Residence**

Workers by Place of Residence

Mode	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Drove alone	12,263	59,107	67,330
Carpooled	2,069	8,208	10,766
Public Transportation	135	357	390
Bicycled	269	489	521
Walked	369	1,809	2,191
Other	274	1,403	1,548
Worked at Home	1,680	5,193	5,775
Total	**17,059**	**76,566**	**88,521**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B08406

As a Share of Total

Mode	Hilton Head Island, SC	Beaufort County, SC	Hilton Head Island-Bluffton-Beaufort MSA
Drove alone	71.9%	77.2%	76.1%
Carpooled	12.1%	10.7%	12.2%
Public Transportation	0.8%	0.5%	0.4%
Bicycled	1.6%	0.6%	0.6%
Walked	2.2%	2.4%	2.5%
Other	1.6%	1.8%	1.7%
Worked at Home	9.8%	6.8%	6.5%
Total	**100.0%**	**100.0%**	**100.0%**

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B08406