

2022-2027

Comprehensive Economic Development Strategy



ADOPTED OCTOBER 12, 2022

Resolution

Resolution

Whereas, the purpose of a Comprehensive Economic Development Strategy (CEDS) is to sustain a regional planning process by which jobs are created, more stable and diversified economies are fostered, and living conditions are improved; and

Whereas, the Coastal Regional Commission (CRC) is the Economic Development District for Coastal Georgia as designated by the Economic Development Administration (EDA); and

Whereas, the U.S. Department of Commerce, Economic Development Administration (EDA) requires the preparation and adoption of a CEDS by a local review committee for initiatives and projects in the Coastal Georgia region; and

Whereas, the CRC Council appointed a review subcommittee to lead the effort in the development of the CEDS Plan; and

Whereas, the CEDS Review Committee and CRC staff began preparation of the CEDS in January 2022; and

Whereas, the CEDS has been prepared and updated to meet the requirements for designation as an Economic Development District and to qualify for assistance under the public works, economic adjustment, and planning programs of the U.S. Department of Commerce, EDA; and

Whereas, said action also directed the CEDS document be submitted to the CRC Council for their review and input; and

Now Therefore, Be It Resolved, that the Coastal Regional Commission Council hereby approves the submittal of the Comprehensive Economic Development Strategy to the US Department of Commerce, EDA to remain in good standing as the Economic Development District for Coastal Georgia.

Adopted this 12th day of October, 2022.



By:


Jason Coley, Chairman

Attest


Ken Lee, Secretary

Acknowledgements



The 2022-2027 Comprehensive Economic Development Strategy (CEDS) is funded by the United States Department of Commerce, Economic Development Administration (EDA). The CEDS was produced under the leadership of the Coastal Regional Commission (CRC) Council with participation from the region's stakeholders, support from partners and collaboration with other regional leaders. Thank you for your invaluable role making and maintaining Coastal Georgia as a unique place to invest, to work, to live, and to play.

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CRC CEDS Committee

The CRC Comprehensive Economic Development Strategy (CEDS) Committee is responsible for developing, implementing, and revising the Comprehensive Economic Development Strategy with the assistance of CRC staff. The Strategy Committee is also responsible for outlining the methodology for cooperating and integrating the CEDS with the State of Georgia's economic priorities, incorporating relevant material from other government sponsored plans, and ensuring consistency with applicable State and local workforce investment strategies. The CRC Strategy Committee represents the main economic interests of the region and includes private sector representatives as much of its membership.

Mr. Jason Coley, *Community and Economic Development Manager, Coastal Region, Georgia Power*

Mr. Christopher Fletcher, *Director, Public Affairs, USAG Fort Stewart*

Ms. Sabrina Newby, *CEO, Coastal Georgia Minority Chamber of Commerce*

Ms. Alicia Johnson, *Executive Director, Step Up Savannah*

Mr. R. Bradley Day, *Executive Director, Development Authority of Long County*

Dr. Dominique Halaby, *Associate Provost for Innovation and Commercialization and Founding Director of the Business Innovation Group, Georgia Southern University*

Mr. Mark Bennett, *Public Affairs and Community Investment, Gulfstream Aerospace*

Mr. Glenn Gann, *Vice President and Administrator, Southeast Georgia Health System - Camden Campus*

Dr. Patrick Holladay, *President, Georgia Grown Trail 17 and Associate Professor of Tourism Management, Troy University - Brunswick*

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CRC Project Team

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Purpose

The Coastal Regional Commission (CRC) serves as the Economic Development District (EDD) for the region's six coastal counties and four inland counties as designated by the U.S. Department of Commerce, Economic Development Administration (EDA).

In accordance with EDA, a Comprehensive Economic Development Strategy (CEDS) is updated and submitted every five years. This important document sets the regional economic development planning process for 2022-2027. The CEDS brings together public and private sectors to create a road map to strengthen Coastal Georgia's regional economy.

The CEDS documents provides an analysis of the region's economy which was used as the guide for establishing regional goals and objectives, developing and implementing a plan of action; and identifying investment priorities and funding sources. By implementing this strategy, the region remains eligible for economic development assistance investment from EDA. This investment can help fund local infrastructure projects, technology-led economic development projects, and strategies to respond to sudden and severe economic situations.



Executive Summary

Coastal Georgia is home to historic towns, industries, military installations, major ports, and a thriving tourism trade, each driving some part of the region's economic engine. The region boasts abundant wildlife, beautiful beaches and over 2300 miles of tributaries and salt marshes. Coastal Georgia's eastern shore stretches almost 100 miles from Savannah in the north to St. Marys in the south.

Due to its coastal geography, shipping is a unique resource for the region's economy. Georgia's ports remain a major advantage for manufacturing and distribution companies located throughout the region. Georgia's ports combine industry innovation with proven flexibility to create new opportunities along the entire global logistics pipeline, while continuing to meet the market demands.

In addition to Georgia's ports, the region is also home to military installations which act as an asset to the region and an economic driver. Two bases provide the backbone of coastal Georgia's defense-related employment, Fort Stewart/Hunter Army Airfield and the U.S. Naval Submarine Base Kings Bay. The Federal Law Enforcement Training Center (FLETC) contributes to the region's economic health.

Coastal Georgia contains some of the most significant heritage assets in the State, high biodiversity, ecosystem services, natural productivity, and most significant habitats which are important elements of tourism development. Economic development via tourism is closely tied to coastal resources through our coastal waterways and the natural, historic, and cultural resources which drive industry. Tourism contributes to the region's economic development as one of the most significant revenue generators for the coast.

Additionally, Coastal Georgia has a vast area of land used for commercial forests. Of the region's inland four counties including Bulloch, Effingham, Long and Screven, the total land area, over half, (~2,000 square miles of land) is forested. Although forestry itself is a relatively small employer in the region, manufacture of paper and other forestry products is a major enterprise, employing workers in plants scattered along the region.

The 2020 census reported a population of 731,630 for the region. This is a 11.51% increase since 2010, and a 31.03% increase since the 2000 census. The region is getting gradually older with the median age at 35.5 and expected to increase to 36.4 by 2026. The Coastal Region has seen a 3.7% decline in poverty since 2014. The median household income cannot keep up with the rise of median housing values. Professional and Business Services and Trade, Transportation, and Utility industries have been identified as developing. Education, health services, Natural Resources, Mining, Agriculture, Financial activities, and information industries have been identified as declining. The local per capita personal income (PCPI) in 2020 was \$42,066, about 18.76% less than Georgia's PCPI and 29.31% smaller than the United States as a whole.

One of the goals of the CEDS is to develop effective strategies to nurture economic growth and development in the region. As a performance-based strategic plan, this CEDS serves an important role in the region's efforts to grow our economy in the face of challenges to the economic vibrancy of the region.



Summary Background

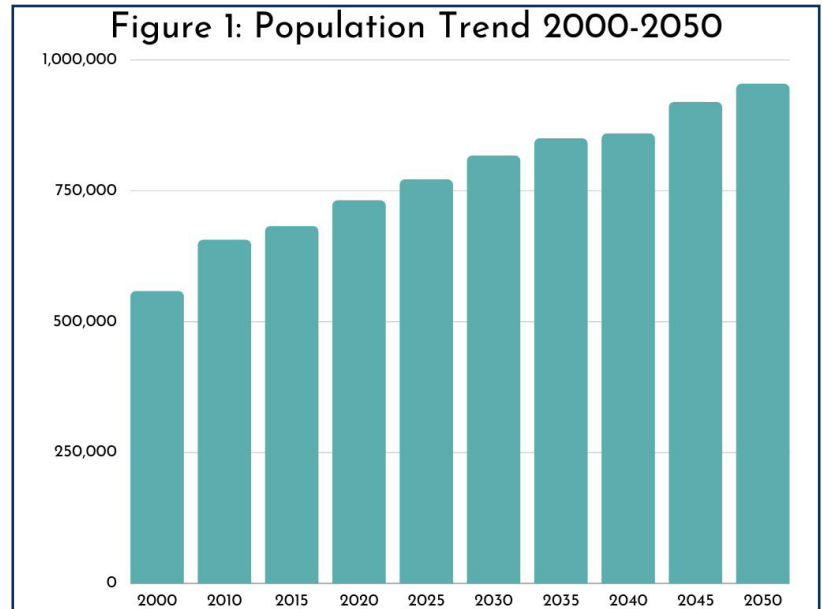
1. Demographics and Social Economics
2. Economic Conditions
3. Business Environment
4. Resources and Environment
5. COVID-19

1. Demographics and Social Economics

1.1 Total Population

The total population of the region recorded in the 2020 Census was 731,630 people. Figure 1 shows the estimated population trends until 2050. According to Environmental Systems Research Institute (ESRI) Business Analyst Online (BAO), the latest estimated number in the 2019 Census was 708,061.

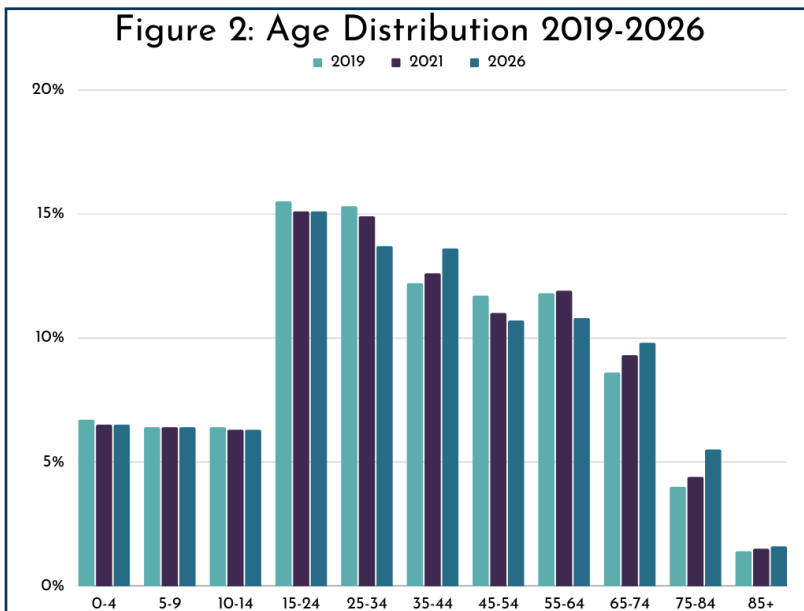
Leaders in the Coastal Region suggest that the total population may have been significantly undercounted. This may be further exacerbated by the Census's inability to count some military personnel. Seasonal residents play a role in total population as the numbers in coastal vacation areas fluctuate throughout the year.



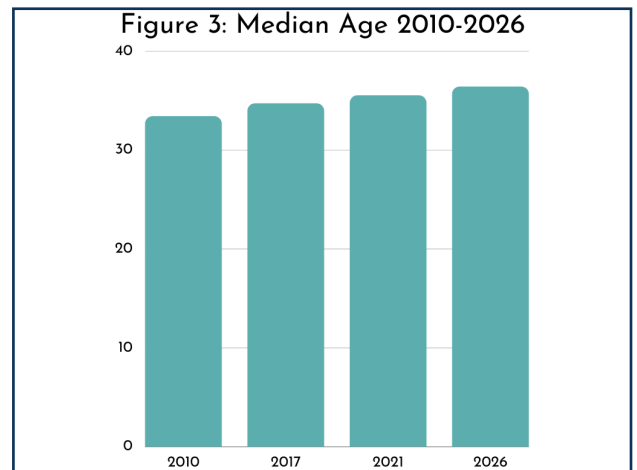
Source: US ACS and Georgia Office of Planning and Budget

1.2 Age Distribution

Figure 2 shows the predicted age distribution for 2026. Figure 3 indicates the median age in Coastal Georgia increased from 34.7 in 2017 to 35.5 in 2021 and is estimated to be 36.4 in 2026.



Source: ESRI



Source: ESRI

1. Demographics and Social Economics

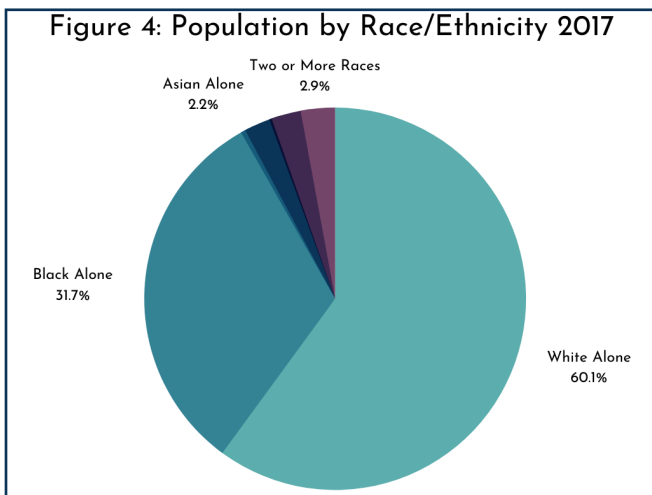
1.3 Race and Ethnicity

Coastal Georgia's majority population is White as demonstrated by the racial breakdown in Figure 5, although data shows that the White population is gradually decreasing, going from 61.3% in 2010, and to 60.0% in 2017, and 59.1% in 2021.

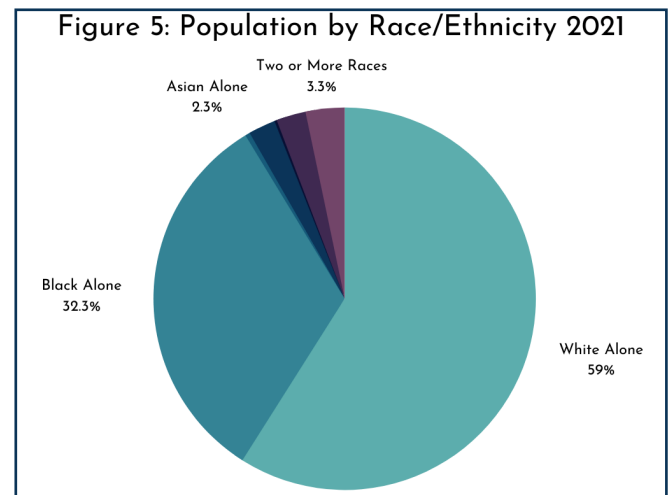
The Black population from 2017 to 2021 has increased from 31.7% to 32.4%. Other groups increasing in percentage include Asian Alone, and Two or More Races. Pacific Islander, Some Other Race Alone, and American Indian Alone have all maintained their numbers.

The Hispanic Origin population increased from 6.8% to 7.20 from 2017 to 2021 and is expected to reach 8.1% by 2026.

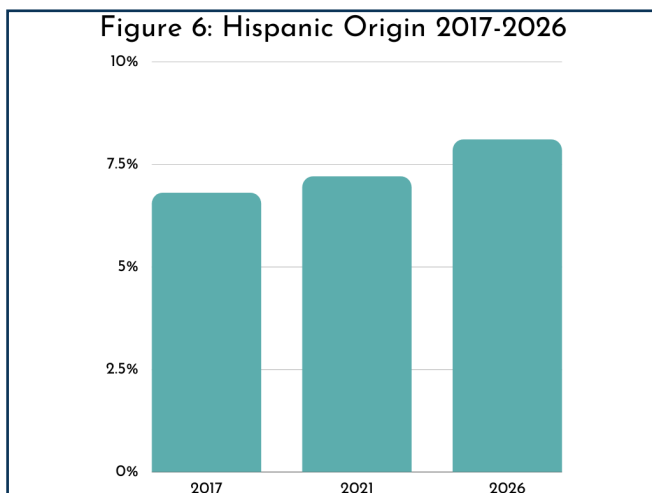
The diversity index shows the likelihood that two people, chosen at random from the Coastal Region, belong to different races or ethnic groups. The index ranges from 0, meaning no diversity, to 100, meaning complete diversity. The racial diversity index in the Coastal Region has continued to rise and is expected to increase to 62.3 by 2026.



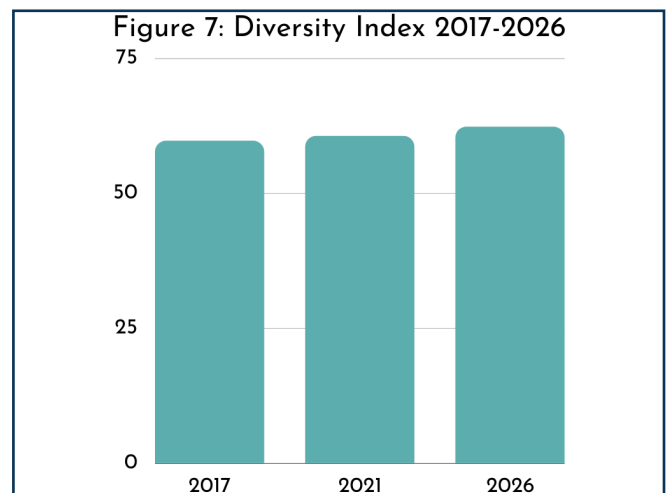
Source: ESRI



Source: ESRI



Source: ESRI



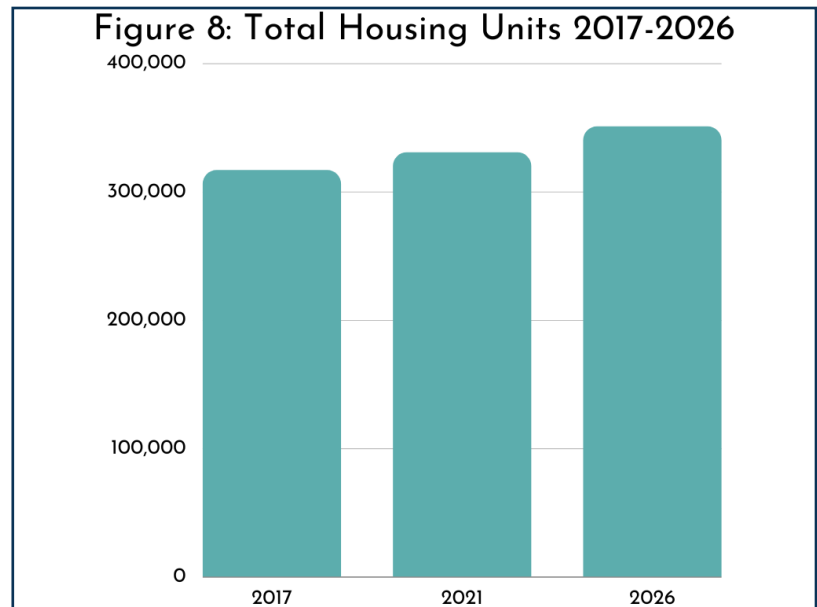
Source: ESRI

1. Demographics and Social Economics

1.4 Housing

According to ESRI Business Analyst Online (BAO), the housing inventory in Coastal Georgia from 2017-2021 increased by 4.4% from 316,754 units to 330,587 units. It is estimated that housing units will increase to 350,774 in 2022.

Of the housing types reported between 2015 and 2019, 67.8% were single-family and 20.8% were multi-family. An estimated 15% of housing units were unoccupied in the coastal region.



Source: 2019 ACS 5-Year Estimates Table B25001

Table 1: Housing Types 2015-2019

	Number	Percentage
Total	309,999	100%
Occupied	263,940	85%
Unoccupied	46,059	15%
Single Family		
Single Family Detached	169,193	64.1%
Single Family Attached	9,776	3.7%
Subtotal	178,969	67.8%
Multi Family		
2 Units in Structure	8,952	3.4%
3-4 Units in Structure	12,967	4.9%
5-9 Units in Structure	12,947	4.9%
10+ Units in Structure	19,951	7.6%
Subtotal	54,817	20.8%
Other		
Mobile Homes, Boats, etc.	30,154	11.4%

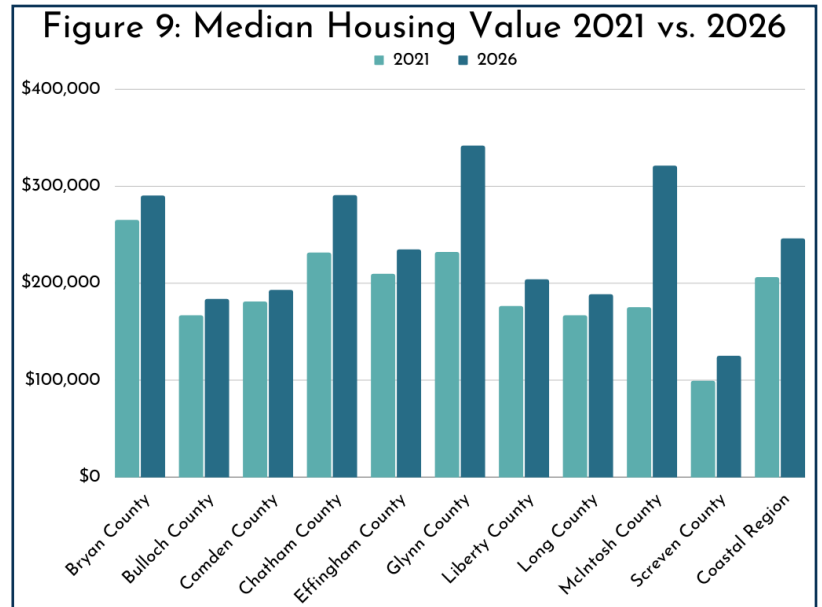
Source: 2019 ACS 5-Year Estimates Table B25001

1. Demographics and Social Economics

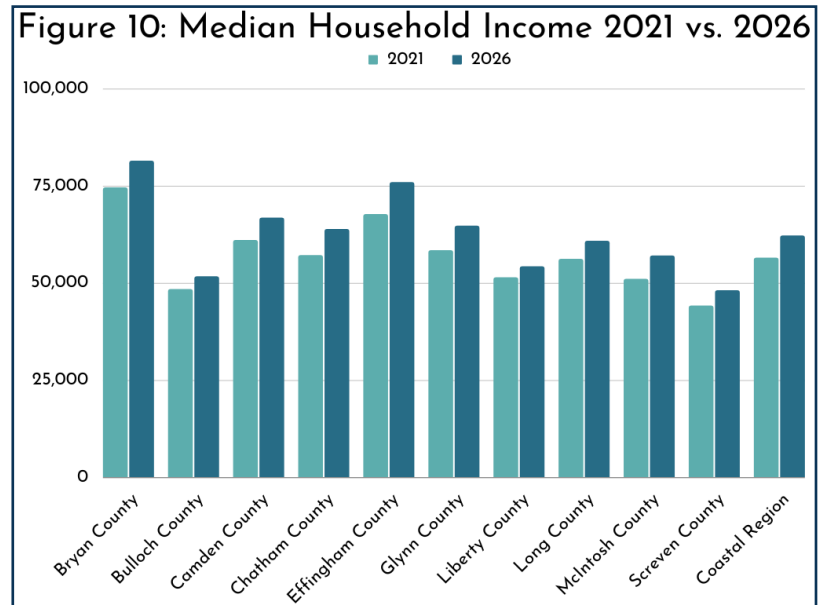
The median household income for the coastal region is expected to increase by 10.1% from 2021 to 2026. In the same period, the growth rate for median house value is estimated to increase by 19.3%. Median household income is unable to keep pace with the rise of median housing values.

2.1 Income and Wage

Per Capital Personal Income measure average income earned per person in a given region in a specified year. It is calculated by dividing the area's total income by its total population as a measure of prosperity. Per Capita Personal Income (PCPI) in Coastal Georgia increased by 15.5% between 2015 and 2020. The 2020 regional PCPI was \$42,066, about 18.76% smaller than Georgia's PCPI and 29.31% smaller than the United States as a whole.

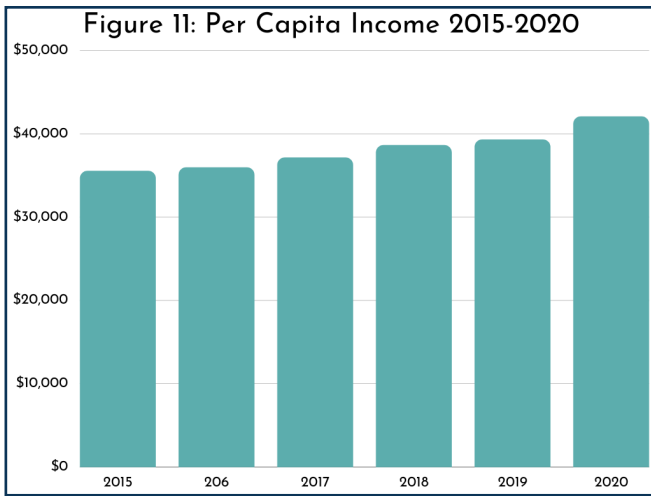


Source: ESRI

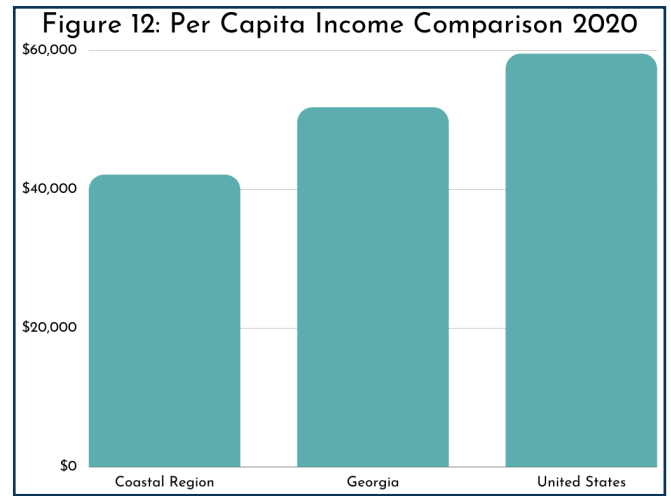


Source: ESRI

2. Economic Conditions

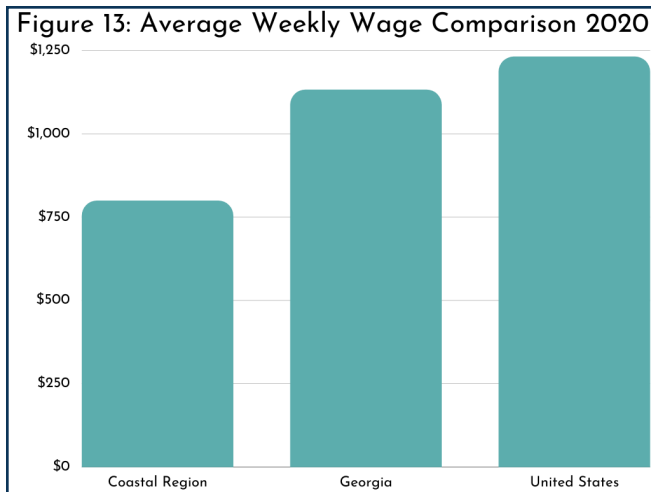


Source: Bureau of Economic Statistics

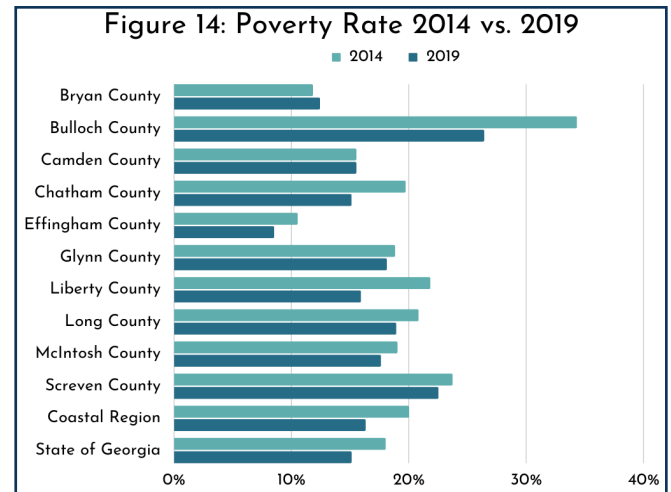


Source: Bureau of Economic Statistics

For all industries in the ten-county coastal region, the 2020 average weekly wage was \$799, which is a decrease of 2.56% since 2016 when the average weekly wage was \$820. The 2020 average weekly wage for Coastal Georgia is about 70.59% of the State of Georgia's average weekly wage, and approximately 64.91% of the United States average weekly wage.



Source: Bureau of Economic Statistics



Source: 2019 ACS 5-Year Estimates Table S1701

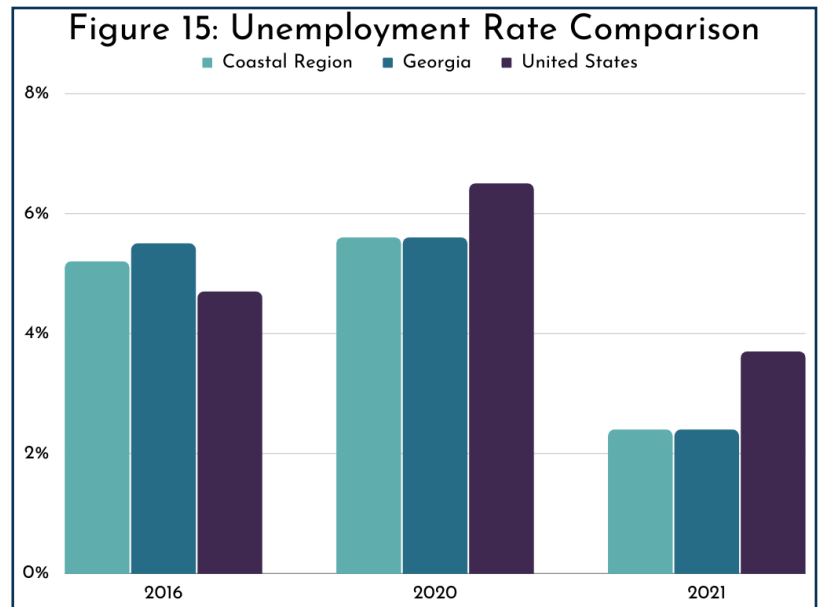
2. Economic Conditions

2.2 Unemployment

Figure 15 shows the unemployment rates for 2016, 2020, and 2021 for the Coastal Region, Georgia, and the United States. Unemployment rates saw an incline in 2020, likely due to the COVID-19 pandemic. In 2021, unemployment has recovered from the 2020 increase, and is now lower than pre-pandemic numbers.

2.3 Public Safety

ESRI BAO defines the crime index values for the U.S. level are 100, representing average crime for the country. A value of more than 100 represents a higher crime rate than the national average, and a value of less than 100 represents a lower crime than the national average. For example, an index of 155 implies that crime in the area is 55 percent higher than the U.S. average; and an index of 47 implies that crime is 53 percent lower than the U.S. average.



Source: 2019 ACS 5-Year Estimates Table S1701

In 2021, the Total Crime Index varied from 50 to 136 and the Personal Crime Index varied from 33 to 114. Bryan, Effingham, and Long Counties ranked the top three in safety Coastal Georgia.

Table 2: Crime Indices 2021

	Total Crime	Property Crime	Personal Crime
Bryan County	53	56	33
Bulloch County	90	94	63
Camden County	92	94	79
Chatham County	130	133	114
Effingham County	64	67	46
Glynn County	136	141	107
Liberty County	124	128	102
Long County	50	50	49
McIntosh County	90	92	79
Screven County	73	70	93
Coastal Region	90.2	92.5	90

Source: ESRI Business Analyst Online

2. Economic Conditions

2.4 Health Outcomes

According to A. Robert Wood Johnson Foundation Program, County's Health Outcomes are based on length of life, and quality of life. County Health Factors include health behavior, clinical care, social and economic factors, and physical environment. Table 3 and Table 4 show the change of rankings from 2017 to 2021 for County Health Outcomes and Health Factors. The Health Outcome Rank varies from 13 to 93; and the Health Factor Rank varies from 14 to 127 out of 159 counties in Georgia. For both categories, Bryan County ranks the best in Coastal Georgia.

Table 3: Health Outcome Rank in Georgia 2017-2021

	2017	2021
Bryan County	20	13
Bulloch County	57	49
Camden County	16	22
Chatham County	41	42
Effingham County	26	30
Glynn County	48	60
Liberty County	47	61
Long County	33	26
McIntosh County	56	97
Screven County	118	93
Coastal Region	46.2	49.3

Source: County Health Rankings

Table 4: Health Factor Rank in Georgia 2017-2021

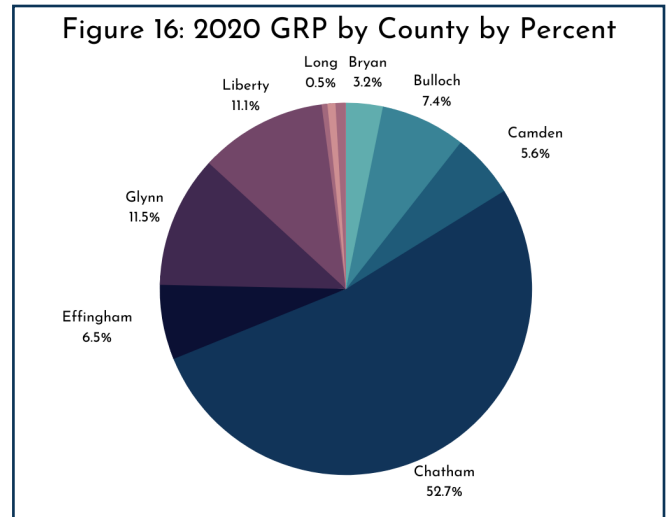
	2017	2021
Bryan County	9	14
Bulloch County	78	45
Camden County	17	34
Chatham County	34	22
Effingham County	25	23
Glynn County	32	40
Liberty County	49	48
Long County	55	59
McIntosh County	51	57
Screven County	135	127
Coastal Region	48.5	46.9

Source: County Health Rankings

3. Business Environment

3.1 Gross Regional Product

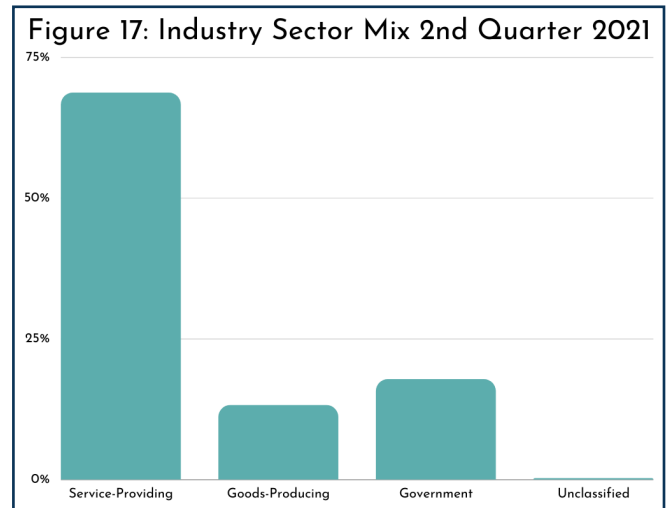
Gross Regional Product (GRP) is defined as the market value of all final goods and services produced within the metropolitan area within a given period. EMSI, an Economic modeling company, shows the latest economic overview in 2020 Coastal Georgia's Gross Domestic Product was \$29.6 billion. Among the ten counties, Chatham has the highest percentage, at 52.7 percent. Nearly thirty Fortune 500 companies are in Chatham County according to Coastal Workforce Development Board (CWDB). Figure 16 demonstrates the percentages of each county.



Source: Bureau of Economic Analysis

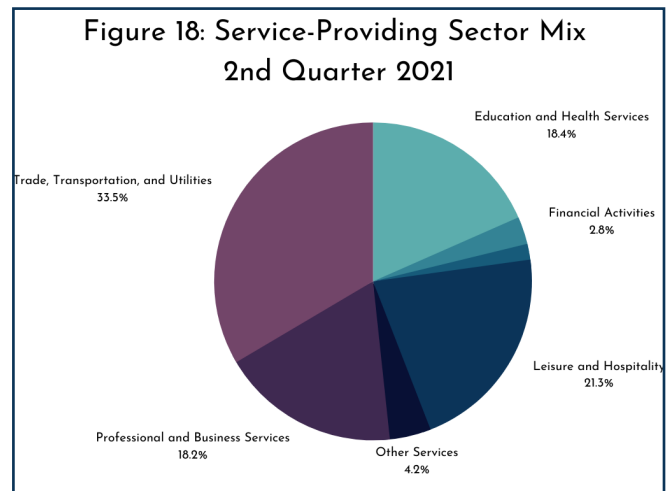
3.2 Industry

Figure 17 shows that service-providing industries lead at 68.7 percent followed by the government sector at 17.8 percent, and goods-producing at 13.2 percent.



Source: Georgia Department of Labor

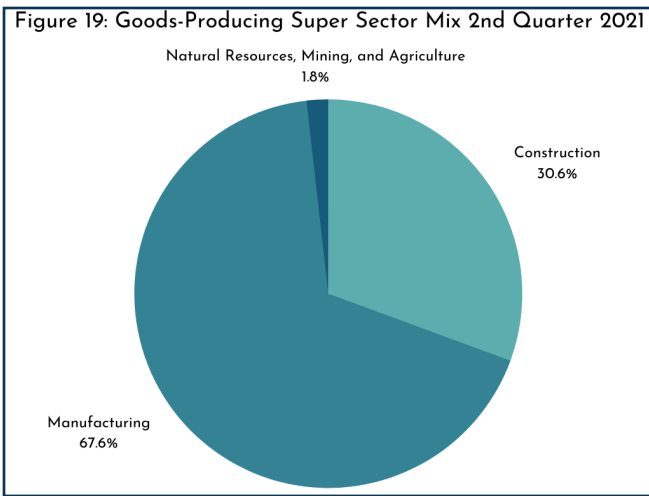
Figures 18, 19, and 20 break down service-providing, good producing, and government super sectors. Figure 18 results show trade, transportation and utilities as the dominant industry in the coastal region, at 33.5 percent. Leisure and Hospitality and Education and Health Services, follow at 21.3 percent and 18.4 percent respectively.



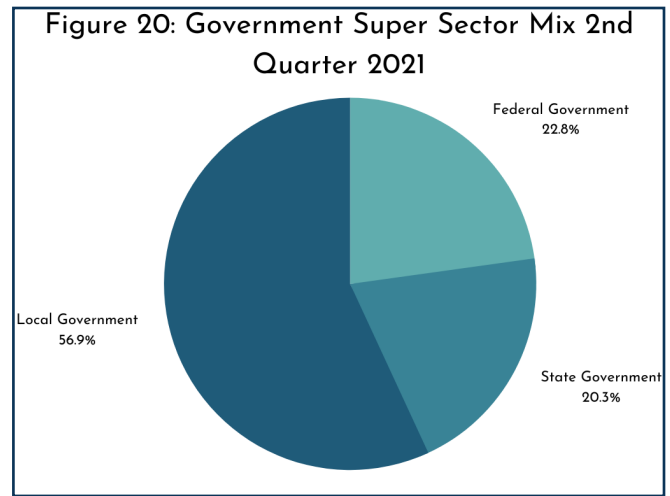
Source: Georgia Department of Labor

Examining the 10 counties together from 2016 to 2020, the industries in terms of absolute number of jobs created as well as the growth rate of employment were professional and business services which grew by 15.9%. Construction had the largest percent increase at 18.5%.

3. Business Environment



Source: Georgia Department of Labor



Source: Georgia Department of Labor

Location Quotient (LQ) measures how concentrated an industry is in a region compared to a national level. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than the reference area.

Table 5: Super Sector Employment and Location Quotient Change 2016-2020

Super Sector	2016 Employment	2020 Employment	Employment Change	Percent Change	2016 LQ	2020 LQ	LQ Percent Change
Construction	9880	11703	1823	18.5%	0.77	0.9	16.9%
Natural Resources	882	693	-189	-21.4%	1.3	0.7	-46.2%
Manufacturing	24124	24708	584	2.4%	1.2	1.3	8.3%
Education	35830	35662	-168	-0.5%	0.57	0.5	-12.3%
Financial	9409	9392	-17	-0.2%	0.56	0.6	7.1%
Information	2370	2264	-106	-4.5%	0.37	0.3	-18.9%
Leisure	42386	37339	-5047	-11.9%	1.41	1.5	6.4%
Professional	25019	29008	3989	15.9%	0.47	0.5	6.4%
Trade	58223	60342	2119	3.6%	0.94	0.9	-4.3%
Unclassified	736	459	-277	-37.6%	1.26	1.5	19.0%
Other	7500	7489	-11	-0.1%	0.97	1.1	13.4%

Source: Bureau of Labor Statistics

3. Business Environment

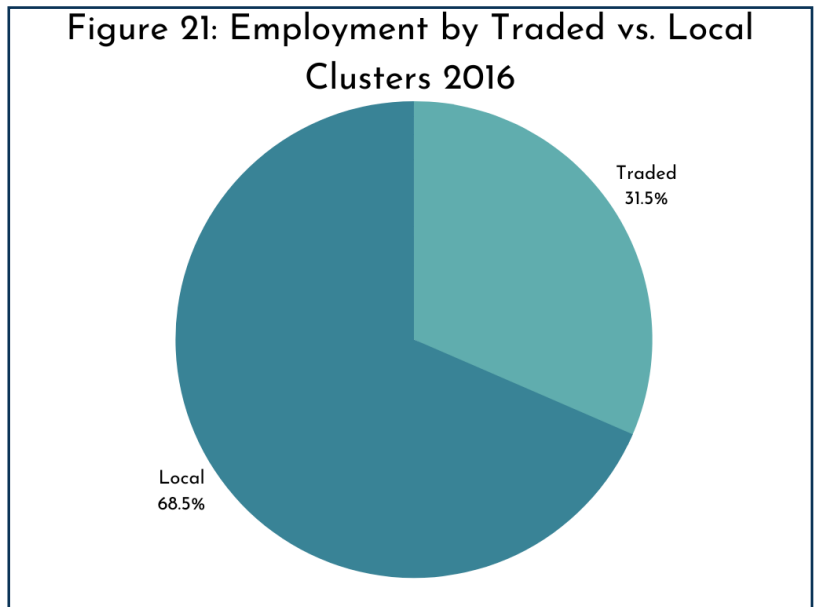
Normally, industries with increasing LQ and job numbers form a region’s economic base. The industries with increasing LQ but with decreasing jobs means they are emerging. The industries decreasing LQ but with growing employment indicates they are developing. The industries with decreasing LQ and decreasing employment suggest they are weak. Table 6 shows each of the super sectors and their designations based on LQ and employment statistics.

3.3 Clusters

Clusters are the “building blocks” of a region’s economy. They drive economic performance in many ways including job creation, wages, and innovation. Companies see clusters as opportunities for investment and site selection (US Cluster Mapping Project).

A traded cluster is composed of traded industries which are concentrated in a subset of geographic areas and sell to other regions while a local cluster serves the region it originates in.

Relatively low LQ with growing employment	Relatively high LQ with growing employment
<i>Developing</i>	<i>Strong</i>
Professional and Business Services Trade, Transportation, and Utilities	Manufacturing Construction
Education and health services Natural Resources, Mining, and Agriculture Financial Activities Information	Unclassified Other Leisure and Hospitality
<i>Declining</i>	<i>Emerging</i>
Decreasing LQ with decreasing employment	Relatively high LQ with decreasing employment



Source: US Cluster Mapping Project

3. Business Environment

Figures 22 and 23 show the top traded and local clusters by employment in Coastal Georgia for 2016.

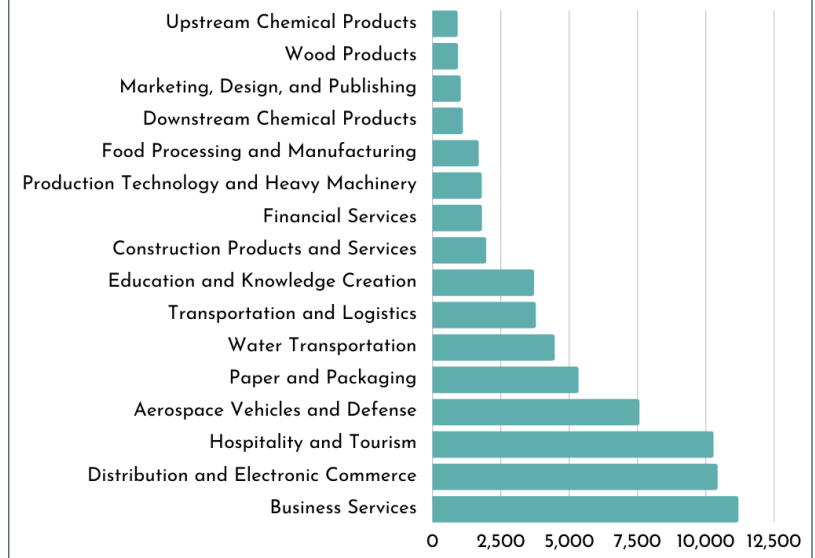
In 2016, the top traded clusters by employment were:

1. Business Services
2. Distribution and Electronic Commerce
3. Hospitality and Tourism

The top local clusters by employment were:

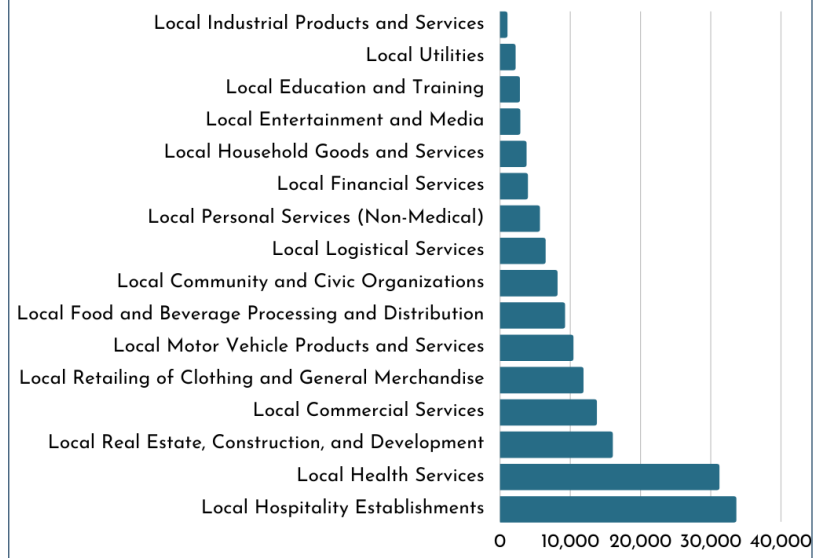
1. Local Hospitality Establishments
2. Local Health Services
3. Local Real Estate, Construction, and Development

Figure 22: Employment by Traded Clusters 2016



Source: US Cluster Mapping Project

Figure 23: Employment by Local Clusters 2016



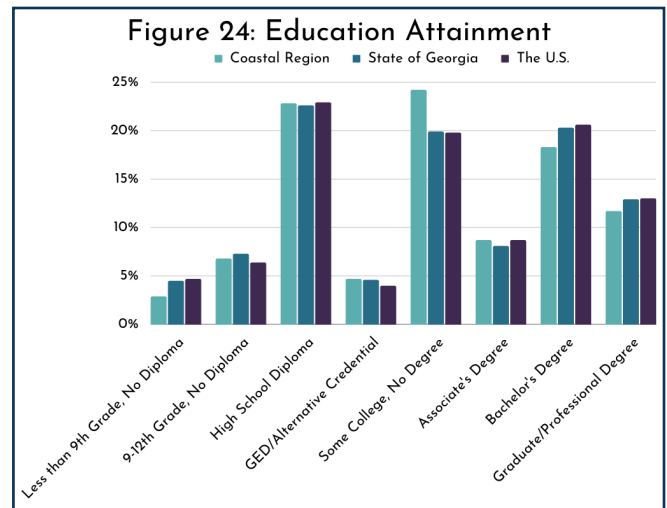
Source: US Cluster Mapping Project

3. Business Environment

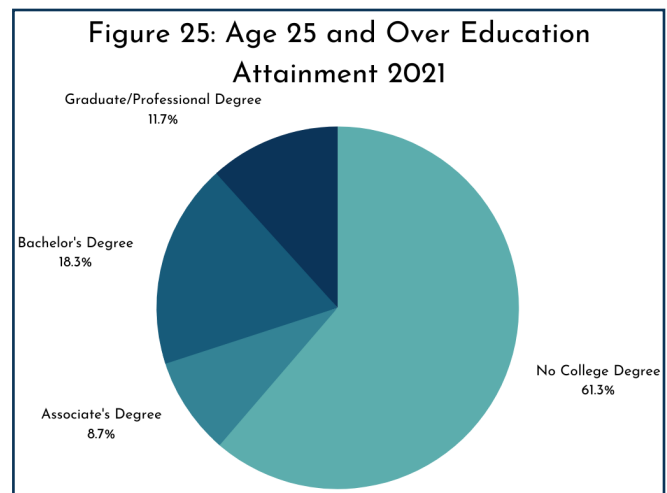
3.4 Educational Attainment

Figure 24 demonstrates that the educational attainment of Coastal Georgia is improving. In 2021, the percentage of educational attainment equal to less than 9th grade, no diploma, and 9th through 12th grade, no diploma is lower than the State of Georgia. 61.3% of the population over the age of 25 have no college degree.

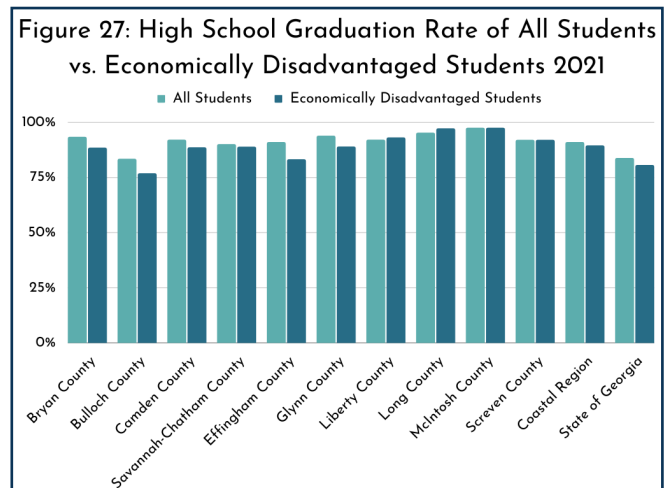
Figure 27 shows the high school graduation rate for 2021 by county. Bulloch County has the lowest graduation rate at 83.4% and McIntosh County has the highest graduation rate at 97.5%. The average graduation rate for the region is 91% and the average graduation rate for the State of Georgia is 83.8%. Figure 27 also shows the comparison between the high school graduation rate for all students and for economically disadvantaged students in the region.



Source: ESRI



Source: ESRI



Source: Georgia Department of Education

3. Business Environment

3.5 Workforce Development

The CWDB created a Workforce Development Area 19 Local/Regional Plan for 2020-2023 that is the basis for the workforce analysis in this CEDS.

The Coastal Workforce Development Board (CWDB) has determined the five industry sectors:

- Logistics and Warehousing
- Healthcare
- Manufacturing
- Hospitality
- Construction

CWDB identifies the region’s greatest strength to be its opportunity for workforce development through personal growth, education, and employment success. However, the region struggles to retain members of the workforce who take advantage of the programs and resources available. There has been growth in the high-demand target sectors, but there is a need for high wages and effective marketing to encourage a workforce that will stay in the region. In the past the CWDB recommended collaboration between stakeholders to bolster the economy and address the needs of the workforce. These efforts have been made, but the commitment to workforce development will need to continue to be a top priority for the region.

Technical schools represent an important stakeholder in the development of the workforce. The Coastal Region is home to three technical colleges, all of which continue to increase their In-Field Place Rates.

Table 7: Georgia Technical College Achievements 2019-2021

Year	Total Graduates		In-Field Placement Rate		Customized Contract Companies		Customized Contract Hours	
	2019	2021	2019	2021	2019	2021	2019	2021
Coastal Pines	1582	1395	96.3%	97.8%	95	114	14265	5018
Ogeechee	1059	880	92.3%	94.4%	29	23	18080	44830
Savannah	1752	1762	93.7%	95.0%	385	563	56516	67444
Source: TCSG								

4. Resources and Environment

4.1 Georgia Ports Authority

Georgia's accessible ports are a major advantage for manufacturing and distribution companies located throughout the region. The Georgia Ports Authority is a leader in the operation of modern terminals and in meeting the demands of international business.

The Port of Savannah, home to the largest single-terminal container facility of its kind in North America, is comprised of two modern, deep-water terminals: Garden City Terminal and Ocean Terminal. Together, these facilities exemplify the GPA's exacting standards of efficiency and productivity. Garden City Terminal is the fourth busiest container handling facilities in the United States, encompassing more than 1,200 acres and moving millions of tons of containerized cargo annually.

Ocean Terminal, Savannah's dedicated breakbulk and Roll-on / Roll-off facility, covers 200.4 acres and provides customers with more than 1.4 million square feet of covered, versatile storage.

The Port of Brunswick is comprised of three GPA-owned deep-water terminals, two of which are directly operated by the GPA. The port's well-earned reputation for productivity and efficiency is heightened by its position as one of the fastest growing auto and heavy machinery ports in North America. Today, more than 12 major auto manufacturers, supported by three auto processors, utilize the Colonel's Island Terminal. The terminal is also home to the South Atlantic's fastest growing bulk export / import operation. Agri-Products from Georgia and the rich U.S. grain belt, as well as import products, flow smoothly across the Colonel's Island docks.

Brunswick's Mayor's Point Terminal facilitates the export of Georgia's valuable forest products, while Marine Port Terminals, operated by Logistec U.S.A., specializes in the handling of breakbulk and bulk commodities.



4. Resources and Environment

4.2 Military Bases

Fort Stewart-Hunter Army Airfield is the Army's Premier Power Projection Platform on the East Coast. Fort Stewart-Hunter Army Airfield is responsible for training, equipping, deploying and redeploying, active and reserve component Army units, and home of the historic 3rd Infantry Division.

Fort Stewart's 285,000 acres provides unequaled joint training opportunities along the eastern seaboard, serving a wide array of customers, the biggest being the 3rd Infantry Division. The Air Force, the Marine Corps, the Navy, Coast Guard, and other Army units are also served. Seven major drop zones, multiple tank and armored fighting vehicle gunnery ranges, helicopter gunnery ranges, small arms ranges and three live-fire maneuver areas contribute to the Department of Defense' ability to train joint forces on the East Coast. Hunter Army Airfield's location in Savannah/Chatham County plays a critical role in the post's deployment capabilities. The largest military aircraft can land at Hunter Army Airfield, load the biggest equipment in the Army inventory and deploy both equipment and soldiers within an 18-hour wheel to air timeline to contingency operations anywhere in the world.

Fort Stewart and Hunter Army Airfield combined economic impact of \$4.9 billion in Coastal Georgia serves as a major economic driver. The daily working population of Stewart-Hunter is approximately 28,615. Businesses that support operations related to Stewart-Hunter employ 10,678 people. It brings in \$71 million in local tax revenues.

Kings Bay Naval Submarine Base in Camden County houses several U.S. Navy Trident nuclear submarines on the 16,000-acre installation. According to the Bureau of Research Economic Development (BRED), the Navy employs approximately 9,900 workers (military, civilian, and contractors) at the base. The economic impact of Kings Bay payroll in 2016 was estimated to be \$855 million, with additional economic benefits imparted through goods, services, and retirees.

4. Resources and Environment

4.3 Prime Agricultural Lands

The conversion of prime farmland to urban uses represents a loss to the region's landscape. Wise use and protection of basic soil and water resources helps to achieve practical water quality goals and maintain viable agriculture. Viable agriculture is the backbone of maintaining a functioning network of working farmland, open space, and natural areas, and a range of strategies should be used to ensure the value of these areas within Bulloch, Screven, Long, and portions of northwestern Effingham counties.

4.4 Forest Lands

Coastal Georgia has an enormous area of land used for commercial forests. Of the region's total land area, about 3,300 square miles, is forested. In addition to this commercial forest, another 17 percent of the land area in the region is held by local, state, or federal government entities, and much of this land is also forested. Although forestry itself is a relatively small employer in the region, manufacture of paper and other forestry products is a major enterprise, employing workers in plants scattered throughout the region.

4.5 Climate

The coastal region is classified as subtropical, with both latitude and proximity to the Atlantic Ocean resulting in moderate temperatures. The average winter temperature is about 45 degrees, and the average summer temperature is near 80 degrees. Temperature exceeds 90 degrees from 75 days (coastal) to 80 days (inland) a year. Freezing temperatures in winter are infrequent (averaging 12 days a year on the coast, 25 days a year inland) and seldom last longer than half a day at a time. Humidity is high, averaging between 60 percent and 75 percent. Annual rainfall ranges between 49 and 54 inches, with slightly higher levels just inland from the coast.

4.6 Wetlands

Under the Georgia Coastal Marshlands Protection Act (O.C.G.A. 12-5-280 et seq.) of 1970, the State recognizes that "the coastal marshlands of Georgia comprise a vital natural resource system. The estuarine area is the habitat of many species of marine life and wildlife and..., the estuarine marshlands of coastal Georgia are among the richest providers of nutrients in the world. Such marshlands provide a nursery for commercially and recreationally important species of shellfish and..., provide a great buffer against flooding and erosion, and help control and disseminate pollutants. The coastal marshlands provide a natural recreation resource which is vitally linked to the economy of Georgia's coast and to that of the entire state. This...system is costly, if not impossible, to reconstruct or rehabilitate once adversely affected..."

4. Resources and Environment

4.7 River Basins and Floodplains

There are five river basins in the coastal region including the Savannah, the Ogeechee, the Altamaha, the Satilla, and the St. Marys. Satilla, St. Marys and Suwannee River basins lie entirely within the Coastal Plain physiographic province, which extends throughout the southeastern margin of the United States. The Satilla River basin lies entirely within the Bacon Terraces and Barrier Island Sequence districts. The St. Marys River basin lies entirely within the Okefenokee Basin and Barrier Island Sequence districts.

The Altamaha River Basin is the third largest river basin in the United States. The entire Altamaha River Basin consists of waters from the Ocmulgee, Oconee, as well as the Altamaha River. The shrimp and fishing industries make up a large part of the Basin's economy. Vast numbers of pine timber forest are harvested to aid in the production of paper and other wood products within the Altamaha basin. The kaolin industry, located in the northern portion of the basin, supplies inputs for making paper, bathtubs, bricks, fine china, and a myriad of other products. All along the river one finds a multitude of agricultural products under cultivation. The basin also affords wildlife viewing areas and habitats, especially for rare native bird species as well as many migratory birds.

The Ogeechee River originates in Green County and then flows through several of the basin's 22 counties before reaching the coast. The river passes through the eastern boundary of Fort Stewart Army Base. Georgia Southern University, in Statesboro also falls within the Basin. The timber and poultry industries are strong in the area. The basin enjoys diverse agricultural production.

The Savannah River Basin extends down the entire length of Georgia's eastern border and contains a diverse array of industries and attractions. The Satilla River Basin is predominantly agricultural. However, forestry and timber production is found in the also prevalent in the basin.

The St. Marys is the smallest of the river basins in the Coastal region. The Okefenokee National Wildlife Refuge, located on the western side of the basin, provides habitat to many rare wildlife and plant species. Kings Bay Naval Base calls the St. Marys Basin home. Moreover, timber is a major industry within the area.



4. Resources and Environment

4.8 Barrier Islands

All 100 miles of Georgia's ocean beaches are on the seaward face of barrier islands. Ten of the 18 major barrier islands along Georgia's coast are in public ownership.

Tybee Island is the farthest north of Georgia's barrier islands. It is approximately four miles long and one mile wide. Tybee is Georgia's most developed barrier island. The commercialism on Tybee consists of hotels, year-round private residences, summer cottages, condominiums, and tourist facilities such as public beaches, fishing piers, marinas, and public campgrounds.

Little Tybee, once privately owned, was acquired by the State of Georgia, with a conservation access allowed to the Nature Conservancy. The only access to the island is by private boat.

Williamson Island is known as Georgia's newest island first detected around 1971 and claimed by the State of Georgia. The island was named for Mr. Jimmy Williamson, a former Mayor of the City of Darien, Georgia.

Wassaw Island is seven miles long and the most primitive and undeveloped of Georgia's barrier islands. In 1969, the Nature Conservancy deeded Wassaw to the federal government as a National Wildlife Refuge. Hundreds of gulls, herons, egrets, migratory songbirds, and shorebirds use the beaches, marshes and freshwater ponds as breeding and nesting grounds.

Ossabaw Island is 10 miles long and two miles wide. In 1978, the island was sold to the State of Georgia as a Natural Wildlife Refuge and in May of that year Ossabaw became Georgia's first Heritage Preserve under the Heritage Trust Act of 1975. As a Heritage Preserve, Ossabaw can be used only for natural, scientific and cultural purposes.

St. Catherine's is a 23-square-mile island with a total acreage of 14,640 acres and 11 miles of natural beaches. Button Gwinnett, one of the signers of the Declaration of Independence, bought the island in 1765 and lived there until 1771. His 19th century family home still stands.

Blackbeard Island's total acreage is 5,618 acres, 9 miles of beach and two and one-half wide at its widest point. In the early 1700's Edward Teach, the famous English pirate popularly known as "Blackbeard," was thought to have buried treasure on the island.

Sapelo Island is about 12 miles long and two to four miles wide with a total area of 17,950 acres, making it the fourth largest of Georgia's barrier islands. Sapelo has five and one-half miles of undeveloped beaches. Sapelo's beach is noted for having the most extensive undisturbed natural beach dunes of any of Georgia's barrier islands. Sapelo Island is jointly owned by the State of Georgia, the R.J. Reynolds Foundation, and the residents of the Hog Hammock Community. Sapelo is a National Estuarine Research Reserve and Wildlife Refuge. Primitive camping and short-term lodgings are offered through the residents of Hog Hammock and the Department of Natural Resources (DNR).

4. Resources and Environment

Wolf Island is located just south of Sapelo at the mouth of the Altamaha River. It has a total of 5,126 acres, of which only 250 acres are high ground including beach and dunes. Access to the island is by boat and only limited public recreation activities are allowed.

Little St. Simons Island is the last family-owned island on Georgia's coast. It was purchased in 1908 by Philip Berlzheimer. His descendants still own the island and operate a retreat where guests are invited to fish, hunt, horseback ride, and take nature tours. The island has a total of 8,840 acres, of which 2,300 acres are uplands, and six and one-half miles of beaches.

Sea Island is connected by causeway to St. Simons Island and is a privately owned beach resort with hotels and private cottages and residences. Development of Sea Island began in 1926 when Howard Coffin bought five miles of beach front and established the Sea Island Company to develop a resort. The Cloister Hotel opened in October 1928 and is today a five-star hotel.

St. Simons is Georgia's only larger barrier island that has never been privately owned. St. Simons consists of 27,300 total acres including marsh. It has 12,300 acres of upland and three miles of beach. The St. Simons Lighthouse, first constructed in 1810 and rebuilt in 1871, is one of the nation's oldest continuously working lighthouses. Most of the island is privately owned residential homes and low-key commercial hotels and condominiums.

Jekyll Island, the smallest of Georgia's major barrier islands, is 10 miles long and one and one-half milewide at its widest point. It has 5,700 total acres, 4,400 of which are uplands. It has eight miles of beach. In 1886, Jekyll was purchased by a group of northern millionaires including Rockefeller, Morgan, Pulitzer, Vanderbilt, Gould, McCormick, Goodyear, Aston, Baker, Biddle, Whitney, Armour, Crane, Macy, and Bliss families for use as a winter resort. In 1947, the state of Georgia bought Jekyll for use as state park. The causeway and bridge were built in 1954, allowing easy access for the public to enjoy year-round recreational activities.

Little Cumberland Island is owned by a private homeowner's association. The island has two and a half miles of beach and 2,400 total acres, 1,600 of which are uplands.

Cumberland Island is the southernmost and longest of Georgia's barrier islands. It has a total of 23,000 acres, 15,000 of which are uplands. The island is one and a half to three miles wide and has 17.5 miles of beach. Thomas Carnegie purchased a portion of the island and rebuilt the Dungeness mansion in 1880. Around 1900, W.P. Bunkly built the Hotel Cumberland. The property later became the property of the Candler family of Atlanta.

Portions of Cumberland were donated to the National Parks Service in 1970 and by an Act of Congress in 1972 it became a National Seashore. In 1982, the northern half of the island was added to the National Wilderness Preservation System. Today the island is managed by the National Parks Service and day trips and short-term camping are available. There are still several private residences on the island and the Grey Field Inn, a private facility, offers overnight accommodation.

4. Resources and Environment

4.9 Interstate

Interstate 95 (I-95) bisects the region from the South Carolina border in the north to the Florida border in the south. This interstate is the primary north/south corridor between the states of New York and Florida. Interstate 16 (I-16) is the primary east/west connector for central Georgia, connecting Savannah in the east with Macon, and providing access to Interstate 75 (access to Atlanta) in the west. I-16 crosses I-95 near Savannah. The interstate access, as well as air and rail facilities make the region a prime location for industrial development dependent upon access to multi-modal transportation and infrastructure.

The Savannah/Hilton Head International Airport provides the region with access to international passenger and cargo air service. The airport is located strategically near the junction of I-95, I-16, and the Savannah Ports, and only minutes from historic downtown Savannah tourism destinations. The region is also home to the Brunswick Golden Isles Airport, a commercial passenger airport, similarly located with convenient access to the Port of Brunswick, I-95 and tourist attractions in the southern portion of the region.

4.10 Broadband

Access to broadband has the potential to boost local economic development. Businesses are more likely to locate or relocate to areas with reliable and fast internet access. Access to broadband allows for industries located in rural areas to compete on a global scale. The Internet is needed for the job-seeking and employment process as more companies conduct hiring practices online, especially in a post-pandemic economy. Businesses with broadband access can reach more candidates that they otherwise couldn't have, enticing more members of the workforce to move to the region. Telecommuting and teleworking have also increased in popularity in recent years and have become a standard for many competitive industries. Without access to broadband these opportunities are missed by local jobseekers.

5. COVID-19

5.1 National Impacts

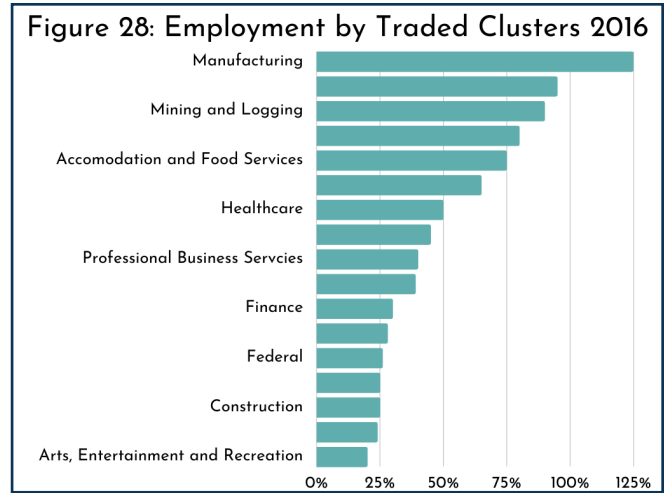
The Wall Street Journal reported on the economic impacts the COVID-19 pandemic had on that nation. Figure 28 shows the national job growth since the start of the pandemic. Manufacturing jobs have seen the most growth with a 125% increase.

Figure 29 demonstrates the monthly number of employee quitting as a percentage of total employment from 2018 to 2022. There is a significant dip in the second quarter of 2020 to 0% quits. After this quarter the quits percentage begins to rise higher than pre-pandemic numbers to 3.10% in the first quarter of 2022.

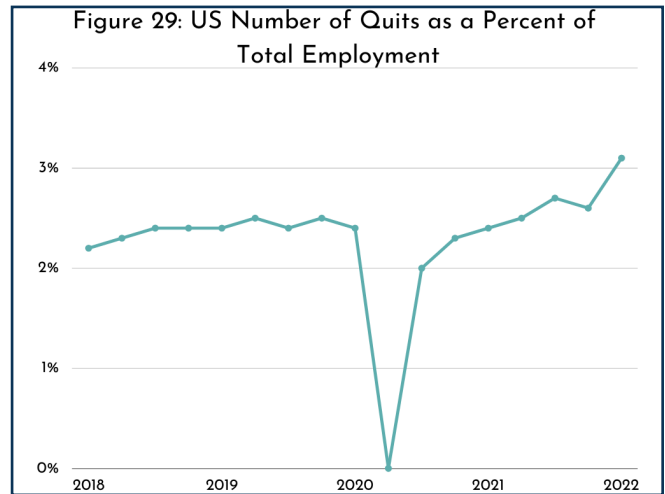
Figure 30 compares the national median hourly wage change from 2018 to 2022. Lowest-earning workers saw the biggest increase in wages overtime and highest-earning workers saw the least change.

5.2 Stimulus

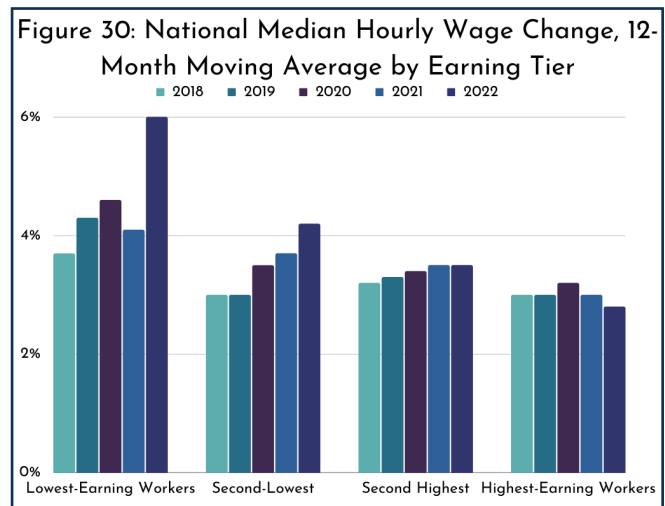
During the pandemic, the federal government provided funds in order to stimulate local economies and personal spending. \$850 billion in funding was allotted to distressed and small business through the CARES Act. \$3 billion in economic development assistance and \$362 billion in state and local fiscal recovery from the ARPA were also designated. 75% of households in the nation spent their first stimulus checks whereas 50% used the second and third checks to pay off debt or add to savings.




Source: Wall Street Journal



Source: Wall Street Journal



Source: Wall Street Journal

An aerial photograph of a lush green wetland. The landscape is dominated by dense, vibrant green grasses and low-lying vegetation. A small, irregularly shaped pond with dark, still water is situated in the upper right quadrant. The water reflects the surrounding greenery. The overall scene is a natural, undisturbed ecosystem.

Community Analysis

1. Preparation
2. Strengths, Weaknesses, Opportunities, and Threats
3. Needs Assessment
4. Economic Resilience

1. Preparation



During the planning process for this Comprehensive Economic Development Strategy, CRC staff participated in webinars, invited key speakers to address the steering committee, and hosted engagement meetings. Outreach efforts for the CEDS were combined with efforts for the 2022 Regional Plan Update. Both planning processes had overlapping timelines and goals.

2. SWOT

Strengths

- Natural coastal assets
- Ports
- Community
- Good place to live
- Desirable for new residents and businesses
- Transportation network
- History
- Tourism
- Educational Institutions
- Military Bases

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Weaknesses

- Lack of high paying jobs
- Lack of economic diversification
- Lack of employment and training opportunities
- Traffic congestion and road wear from heavy freight traffic
- Lack of public transportation
- Low walkability
- Lack of affordable housing
- Crime
- Unplanned growth
- Poverty
- Lack of healthcare access
- Low public participation
- Lack of recreation options
- Homelessness

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Opportunities

- "Smart growth"
- Attracting high paying employers
- Development of marine industry
- Good time and place for economic development
- Infill development
- Improving bike and pedestrian connections
- Reversing brain drain by attracting jobs and building livable communities
- Encouraging talented people to live here
- Regional coordination on stormwater runoff
- Promoting eco-tourism

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Threats

- Loss of natural resources and coastal assets
- Public service capacity strained by sprawl
- Sea level rise
- Natural disasters
- Septic tank failure
- Aging infrastructure
- Competition for workforce
- Depleting water supply
- Failure to engage rural residents
- Loss of dunes and buffers
- Aging workforce approaching retirement
- Property blight
- Decline of seafood industries

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3. Needs Assessment

Needs

- Shift from lower paying service jobs to higher paying manufacturing jobs
- Sufficient jobs and economic opportunities for rural residents
- Economic diversification
- Labor skills and education to support a diverse group of industries
- Protect locally owned retail stores in downtown areas from regional shopping centers
- Support programs for entrepreneurs and minority-owned businesses
- Promote expansion of existing businesses and new industry
- Redevelopment opportunities
- Support in coastal commercial fisheries industry
- Preserve the traditional silviculture industry in Coastal Georgia
- Brownfield prevention and rehabilitation
- Promote growth and development through amending wastewater processing and water consumption limitations
- Communication between governments, authorities, businesses, and citizens in planning and implementing economic development plans

Opportunities

- Market existing industrial parks with the infrastructure in place
- Promote more high value, environmentally sound industries
- Promote proximity to ports and regional transportation
- Support the quality K-12 educational systems already in place and improve others
- Take advantage of the numerous options for advanced education and workforce development
- Promote strong healthcare and engineering educational opportunities in the region
- Tap into the supply of professional, technical information, and expertise available in the region
- Support existing local chambers of commerce and development authorities in their promotion of the area's towns, counties, and local businesses
- Attract businesses with airports, transit systems, and other regional transportation initiatives
- Promote available commercial property and infill properties in the already-populated areas of the region
- Encourage private and public partnerships to redevelop neglected areas under Georgia's Urban Redevelopment Act
- Support the viable coastal fisheries industry through state and local programs
- Maintain undeveloped land in the region that is best suited for forestry and agricultural purposes.
- Recruit growth industries that can use the skills of workers in declining industries
- Develop or enhance collaboration between local economic development agencies and community-based organizations
- Begin international outreach by tapping into Georgia Department of Economic Development job training programs.
- Incentivize and support developments that rehabilitate existing brownfield sites

4. Economic Resilience

The EDA defines economic resilience as “the ability of a region or community to anticipate, withstand, and bounce back from shocks and disruptions, which includes both natural and human disasters”. All communities must be able and willing to recognize their vulnerabilities and develop strategies that lead to mitigation and long-term recovery. A resilient region minimizes disruption to everyday life and economies. Economic resilience is mentioned throughout this plan.

Preparing for possible disruptions is integral to creating resilience in the region. Having up-to-date hazard mitigation plans, emergency operation plans, and climate action plans means the community is aware of their vulnerabilities and has identified the path needed to mitigate risk or respond to shocks. Some communities in the region have struggled with maintaining up-to-date plans, furthering the risk to the communities they are meant to serve. Businesses can also help themselves resist shock by implementing emergency action plans with their employees.

Communities with unequal distribution of wealth are less resistant to economic shock, making recovery efforts more difficult. The Gini index captures the level of inequality. A coefficient of zero is considered perfect equality and one is considered extreme inequality. A higher Gini coefficient means that less people receive more of the income in the region. The counties in the coastal region all have a significant income gap.

Identified Threats to Economic Resilience:

- Income Inequality
- Gaps in Resilience Planning
- Lack of Transportation within Lower Income Families
- Lack of Business Continuity Plans
- Threats to Coastal Ecosystem
- Access to public services
- Aging Infrastructure
- Lack of economic diversity

Table 12: Distribution of Wealth Comparison 2020

	Gini Index	Margin of Error
United States	0.4817	±0.0004
Georgia	0.4814	±0.0019
Bryan	0.4058	±0.0188
Bulloch	0.4863	±0.0468
Camden	0.4276	±0.0280
Chatham	0.482	±0.0118
Effingham	0.4332	±0.0469
Glynn	0.4848	±0.0222
Liberty	0.3991	±0.0145
Long	0.4206	±0.0318
McIntosh	0.4203	±0.0285
Screven	0.4656	±0.0255
Source: B19083 ACS 2020 5 Year-Estimates		



Strategy Action Plan

1. Vision
2. Goals and Objectives
3. Resources, Tools, and Financing for Implementation

1. Vision

The region seeks to be economically resilient by investing in workforce training, innovative development plans, regional marketing efforts, quality of life, and economic diversification.

2. Goals and Objectives

The Coastal Regional Commission, through a process of surveys, meetings, and briefings, offers the following goals and objectives as the course of proposed activities that will improve the economic vitality of the ten-county region.

1. Infrastructure and Development

Develop long-term plans to encourage resilient infrastructure and sustainable development that serves the needs of the region.

2. Workforce

Develop opportunities for workforce development and education to sustain a competitive workforce.

3. Global Competitiveness

Market the region on a national and global scale to encourage economic growth.

4. Local Investment

Encourage local participation and investment in the community.

5. Resilience

Reduce vulnerabilities and strengthen the resilience of the region through both steady-state and responsive initiatives.

3. Financing for Implementation

The Georgia Department of Community Affairs publishes an “Economic Development Financing Packet” which is an excellent inclusive listing of various financing resources. These Incentives vary from local initiatives to statewide initiatives. Business Development Funds are various federal, state, and local financing programs which help provide business and industry with needed capital to make their projects happen. The following overview is not all inclusive but merely a listing of the most used or best-known programs in the area. There are four primary sources of grant funds available for economic development: Georgia Department of Community Affairs, the OneGeorgia Authority, the Economic Development Administration, and the United States Department of Agriculture-Rural Development. The Small Business Development Center (SBDC) at the University of Georgia has a proven track record in new business creation and providing access to monies. This section also includes the programs listed under the Bipartisan Infrastructure Law that went into effect in 2022.

3.1 Small Business Development Center University of Georgia

The Small Business Development Center’s (SBDC) goal is to enhance the economic well-being of Georgians by providing a wide range of educational services for small business owners and aspiring entrepreneurs. New business creation is the lifeblood of our economy, and the infusion of capital enables firms to finance future growth.

SBDC assists clients with access to money through loans and equity financing. The SBDC helps navigate through obstacles that come with stages of the business cycle. Over the past years clients of the SBDC added approximately 11,785 new jobs to the economy.

3.2 Georgia Department of Community Affairs

Community Development Block Grant

The primary objective of the economic development (ED) component of the CDBG program is the expansion of economic opportunities in cities and counties, principally for persons of low-and-moderate income. This is accomplished by funding viable projects which cannot take place without CDBG assistance. Applicants should note that any project must create or retain jobs for low- and moderate-income people.

CDBG annual competition grants may be loaned to businesses or used to build public infrastructure that make business projects possible and create employment for low- and moderate-income persons. Generally eligible are:

1. Projects carried out by public or private nonprofit entities including:
 - a. Acquisition of real property;
 - b. Acquisition, construction or rehabilitation of public facilities, site improvements and utilities.
2. Loans to private businesses for fixed asset financing when assistance is necessary and appropriate to carry out an economic development project.

3. Financing for Implementation

Loans are usually made at below-market rates with favorable terms (but no more favorable than the minimum necessary to make the project feasible). Payback is not required where CDBG funds are used for public infrastructure projects

Employee Incentive Program

The Employment Incentive Program (EIP) is a financing program capitalized with State CDBG funds that may be used by private businesses along with conventional private financing to carry out economic-development projects which will result in employment of low- and moderate-income persons. Eligible EIP activities encompass three broad areas:

1. Grants to local governments for the installation of public infrastructure which supports an eligible economic development project. Eligible projects include public water and sewer systems, distribution and/or collection lines, wastewater treatment projects, rail spurs, and various other types of public facilities;
2. Grants to local governments who then loan the EIP proceeds to a sub-recipient business to finance various fixed assets used in an eligible economic development project. Eligible uses for EIP loan funds include financing for fixed assets: land, new facilities, rehabilitation of existing facilities, machinery and equipment, and some types of privately owned infrastructure.
3. Grants to local governments for assistance to local development entities and other local non-profit corporations to fund facilities which assist low- and moderate-income persons to acquire employment, the employment skills and/or basic educational training to become more effective participants in the local economy. Eligibility for such activities will be limited to "new" activities which have not previously been undertaken by the unit of local government or local development entity. EIP projects must always create or retain employment principally for low- and moderate-income people.

Job Tax Credit

A Job Tax Credit program is designed to encourage businesses to locate and to expand in the state by providing tax credits for certain businesses that create new jobs. The state is divided into four tiers based on demographic calculation of need and the more needy counties are provided a higher tax credit.

3. Financing for Implementation

Opportunity/Enterprise Zones

The Enterprise Zone Employment Act recognizes the need for revitalization in areas of Georgia. The State Enterprise Zone program intends to improve geographic areas that suffer from disinvestment, underdevelopment, and economic decline while encouraging private businesses to reinvest and rehabilitate these places.

The Enterprise Zone area must meet three of the following five criteria:

1. Pervasive poverty established by U.S. Census data in that each block group must have at least a 20 percent poverty level,
2. Unemployment Rate at least 10 percent higher than the State, or significant job dislocation.
3. Underdevelopment evidenced by lack of building permits, licenses, land disturbance permits, etc. and lower development activity than within the local body's jurisdiction.
4. General distress and adverse conditions (population decline, health and safety issues, etc.)
5. The presence of general blight is evidenced by the inclusion of any portion of the nominated area in an urban redevelopment area.

Opportunity Zone Tax Credit Program

Opportunity Zone Tax Credit program is a designation of a "less developed area" that is within two or more census block groups with 15 percent or greater poverty, within an enterprise zone, and where an urban redevelopment plan exists. Opportunity Zones are intended to encourage development and redevelopment in smaller geographic areas than are served by existing economic development programs. State resources are directed towards these "pockets of poverty" in a way that can be supplemented by federal programs.

3.3 OneGeorgia Equity Fund

OneGeorgia Equity Fund is a community and economic development tool providing financial assistance through grants and loans to promote development and retention of employment opportunities and enhancement of various infrastructures.

Eligible recipients include local governments, local government authorities, and joint or multi-county development authorities in rural counties with high poverty rates. Equity funds may be used for a multitude of economic development activities designed to increase employment opportunities.

OneGeorgia Economic Development Growth & Enterprise (EDGE) program, is a specialized economic development tool used to enhance Georgia's competitiveness in attracting significant economic development projects. EDGE funds are targeted for competitive projects in rural counties suffering from high poverty. All of the Coastal Region's counties are either conditionally eligible, or eligible to receive OneGeorgia Equity Funds.

3. Financing for Implementation

3.4 Economic Development Administration (EDA)

EDA provides grant funds to help build or expand public facilities essential to industrial and commercial growth such as industrial parks. Over the past forty years, EDA funds have been used in almost every county in the region. EDA also provides grants to designated economic development districts for planning and economic development technical assistance.

3.5 USDA Rural Development

USDA Rural Development financial programs support essential public facilities and services including water and sewer systems, housing, health clinics, emergency service facilities, electric, and telephone service. The program promotes economic development by supporting loans to businesses through banks and community-managed lending pools.

The program offers technical assistance and information to help agricultural and other cooperatives get started and improve the effectiveness of their member services. Rural Development achieves its mission by helping rural individuals, communities, and businesses obtain financial and technical assistance needed to address their diverse and unique needs. Rural Development works to make sure that rural citizens can participate fully in the global economy.

3.6 Small Business Administration

SBA offers programs which have been used in the coastal Georgia region, including the SBA 7a and SBA 504 loan programs. The SBA 7a program is a conventional bank loan with SBA providing a guarantee to the local financial institutions. The SBA 504 provides direct financing for 40 percent of the fixed assets needed by the new or expanding business. The SBA takes a second lien position behind a conventional bank lender who provides 50 percent of the project financing. The business is only required to inject 10 percent of the project. The 90 percent long-term financing offered by this program has been very beneficial to the economic development of the region.

3.7 Georgia Environmental Finance Authority (GEFA)

The Georgia Environmental Finance Authority provides loans for water, sewer, and solid waste infrastructure; manages energy efficiency and renewable energy programs; oversees land conservation projects; and manages and monitors state-owned fuel storage tanks. These programs improve Georgia's environment, protect its natural resources and promote economic development (Georgia.gov).

3. Financing for Implementation

3.8 Georgia Department of Transportation (GDOT)

The Local Maintenance & Improvement Grant (LMIG) program is designed to help local governments achieve much-needed improvements to the state's roadway network. The LMIG program allows local governments greater flexibility and quicker project delivery while allowing administering the program with a reduced workforce and new funding match requirements.

3.9 General Fund and Bond Proceeds

General Fund and Bond Proceeds is funding that can be used to help local governments or communities underwrite expenditures for economic development. Some governments set aside fund balance as well for use in economic development. They are utilized for public property of the state.

3.10 Special Purpose Local Option Sales Tax (SPLOST)

A special-purpose local-option sales tax (SPLOST) is a financing method for funding capital outlay projects in Georgia. It is an optional 1% sales tax levied by any county for the purpose of funding the construction of parks, schools, roads, and other public facilities. The revenue generated cannot be used towards operating expenses or most maintenance projects.

3.11 Bipartisan Infrastructure Law

The Bipartisan Infrastructure Law includes competitive funding available to local governments for investing in community infrastructure. The funding is broken down into 25 opportunities for states or local governments to apply for and coordinate efforts.

Rebuilding American Infrastructure Sustainably and Equitably (RAISE) Grants

A previously existing grant program at DOT, RAISE provides funding for road, rail, transit, and other surface transportation of local or regional significance. Selection for funding is based on safety, sustainability, equity, economic competitiveness, mobility, and community connectivity.

Port Infrastructure Development Program Grants

From DOT, this program funds investment for the modernization and expansion of US ports. Funds can be used to remove bottlenecks, ensure long-term competitiveness, movement improvements, port electrification, idling reduction, worker training, resilience, and sustainability while reducing impacts to the environment and neighboring communities.

Bus & Bus Facilities Competitive Grants

This DOT program provides capital funding for the replacement, rehabilitation, purchase, or lease of buses, bus related equipment, and bus-related facilities. It also provides funding for low or no emissions bus projects. or national significance. Eligibly includes large projects that are unachievable without financial assistance.

3. Financing for Implementation

National Infrastructure Project Assistance (Also known as "Megaprojects" or MEGA)

This grant program supports multi-modal and multi-jurisdictional projects that are of regional or national significance. Eligibly includes large projects that are unachievable without financial assistance.

Infrastructure for Rebuilding America (INFRA) Grants

DOT program that supports highway and rail projects of regional and economic significance.

Safe Streets and Roads for All

A grant program with DOT that provides funding directly to local governments to support efforts for vision zero and complete streets plans to reduce cyclist and pedestrian crashes.

Charging and Fueling Infrastructure Grants

A grant from DOT to fund the strategic deployment of public access electric vehicle charging infrastructure, and hydrogen, propane, and natural gas fueling infrastructure.

Clean School Bus Program

A new grant program from the EPA provides funding to replace school buses with low or zero emission school buses.

Reconnecting Communities

A new program at DOT that aims to connect communities divided by transportation infrastructure, particularly historically disadvantaged communities. Provides funding to states, local governments, MPOs, and tribal governments for planning, design, demolition, and reconstruction of street grids, parks, or other infrastructure.

Rural Surface Transportation Grant

A new grant program at DOT to improve and expand surface transportation and infrastructure in rural areas, increasing connectivity, improving safety and reliability of the movement of people and freight, and generate regional economic growth.

Building Resilient Infrastructure and Communities Program

A program out of FEMA that distributes funds to support communities with hazard mitigation projects to reduce risk.

Flood Mitigation Assistance

A program out of FEMA that provides funding for projects to reduce or eliminate the risk of repetitive flood damage to buildings insured by the National Flood Insurance Program.

Brownfields Remediation Program

An EPA program that provides grant funding and technical assistants to communities to assess and clean-up contaminated properties and offer job training programs.

3. Financing for Implementation

Energy Efficiency and Conservation Block Grants

A Department of Energy block grant program that provides funds to states, local governments, and tribes for projects aimed at reducing energy use, increasing energy efficiency, and cutting pollution.

Grants for Energy Efficiency and Renewable Energy Improvements in Schools

This program from the Department of Energy provides funds for local government education agencies and nonprofits to make energy efficiency, renewable energy, and clean vehicle upgrades and improvements at public schools.

Energy Improvement in Rural or Remote Areas

This Department of Energy program provides funds to entities in rural or remote areas to increase environmental protection from the impacts of energy use and improve resilience, reliability, safety, and availability of energy.

Grants for Energy Efficiency and Resilience Code Adoption

This Department of Energy program provides funds to state energy agencies to enable sustained, cost-effective implementation of updated building energy codes to save customers money on energy bills.

Regional Clean Hydrogen Hubs

This program from the Department of Energy provides funds to support the development of at least four regional clean hydrogen hubs to improve clean hydrogen production, processing, delivery storage, and end use.

Community Wildfire Defense Grant Program

This program out of the Department of Agriculture provides grants to communities at risk of wildfire to develop or update their community wildfire protection plans and carry out plan implementation.

ReConnect Program

This Department of Agriculture program provides funds in loans and grants for projects that provide broadband to rural areas.

Middle Mile Grants Program

This program from the Department of Commerce provides grants for the conservation, improvement, or acquisition of middle mile broadband infrastructure.

3. Financing for Implementation

State and Local Cybersecurity Grant Program

This program out of the Department of Homeland Security provides funding to state, local, and tribal governments to address cybersecurity risks and cybersecurity threats to information systems.

Smart Grid Investment Grant Program and Energy Sector Operational Support For Cyber Resilience Program

These Department of Energy programs provide funds for electric utilities to modernize the electricity grid and increase resilience to cybersecurity threats.

Water & Groundwater Storage and Conveyance

This program from the Department of the Interior provides funds for water storage projects.

Emergency Watershed Protection Program

This program from the Department of Agriculture provides technical and financial assistance to project sponsors for the design and construction of measures to help repair damages from a recent disaster.



Evaluation and Implementation

1. Evaluation
2. Implementation

1. Evaluation

For this economic development plan to be achievable, there must be ways to measure the success of each goal from approval to horizon year. Economic conditions are always changing, making review of the CEDS goals and objectives necessary. Through annual reports the CRC can determine the areas of success within the CEDS are reevaluated for any problem areas. The annual report of accomplishments is an evaluation tool used to maintain the desired vision of the region. This document is maintained by CRC staff under the guidance of the CRC councils.



2. Implementation

1. Infrastructure and Development

Develop long-term plans to encourage resilient infrastructure and sustainable development that serves the needs of the region.

Objective	Action Item	Performance Evaluation Schedule					Responsible Party	Time Frame
		2023	2024	2025	2026	2027		
Encourage new developments in infill areas and clusters in accordance with smart growth practices.	Identify potential sites for new development that fits within smart growth practices.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
	Work with regional partners to create and market more incubators/ makerspaces.	x	x	x	x	x	CRC, regional stakeholders, local governments	Mid
Support and assist local governments on redevelopment and rehabilitation projects for dilapidated structures.	Identify structures that are in need of rehabilitation using crowdsourcing methods.	x	x	x	x	x	CRC, regional stakeholders, local governments	Mid
	Make abandoned structures more appealing for redevelopment by the private sector.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
Support and assist local governments on development or refurbishment of needed infrastructure.	Create an online form for residents to report needed infrastructure improvements.	x	x	x			CRC	Short
	Continue to conduct an inventory of assets and needs across the region.	x	x	x	x	x	CRC, regional stakeholders, local governments	Mid

2. Implementation

2. Workforce

Develop opportunities for workforce development and education to sustain a competitive workforce.

Objective	Action Item	Performance Evaluation Schedule					Responsible Party	Time Frame
		2023	2024	2025	2026	2027		
Collaborate with CWDB and other organizations and agencies to initiate equitable access to education, training, and employment access.	Explore opportunities to increase the level of educational attainment.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
	Offer technical support and feedback on draft grant applications, development, monitoring, and administration.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
	Survey stakeholders to identify training needs among the workforce.	x	x				CRC, regional stakeholders, local governments	Short
Support an aging workforce through continued education and quality of life investments.	Identify opportunities for adult education funding.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
Market the educational opportunities in the region to expand workforce.	Analyze and report on annual workforce trends.	x	x	x	x	x	CRC, regional stakeholders	Long

2. Implementation

3. Global Competitiveness

Market the region on a national and global scale to encourage economic growth.

Objective	Action Item	Performance Evaluation Schedule					Responsible Party	Time Frame
		2023	2024	2025	2026	2027		
Assist counties with identifying and addressing broadband deployment gaps.	Survey region for gaps in broadband access and identify underserved and unserved areas.	x	x				CRC, regional stakeholders, local governments, GIS, DCA	Short
Coordinate the county development efforts, the industry clusters, and the location incentives to overseas markets and investors via DEcD foreign offices.	Collaborate with county economic development authorities to establish industrial marketing efforts of the region with special emphasis on local fishing industries.	x	x	x	x	x	CRC, regional stakeholders, local governments	Mid
	Collaborate with tourism bureaus, chambers, downtown development authorities, environmental groups, and economic development organizations to effectively market the region.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long

2. Implementation

4. Local Investment

Encourage local participation and investment in the community.

Objective	Action Item	Performance Evaluation Schedule					Responsible Party	Time Frame
		2023	2024	2025	2026	2027		
Develop a strong sense of place throughout the region.	Maintain a network of cultural and environmental resources in the region.	x	x	x	x	x	CRC	Long
	Promote the preservation of historic sites and structures to enhance opportunities for tourism and economic development that maintains the region's heritage and character.	x	x	x	x	x	CRC, regional stakeholders, local governments	Mid
	Promote downtown revitalization efforts to enhance job creation and centralize businesses and offices.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
	Identify locations for wayfinding to promote the cultural and geographic resources of the region.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
Promote or develop resources that would aid in improving quality of life.	Continue to work with local governments to improve affordable housing.	x	x	x	x	x	CRC, regional stakeholders, local governments	Long
	Support and promote financing programs available via CADDAs, county RLFs, regional CDFIs as well as appropriate state and federal programs, with special emphasis on local businesses.	x	x	x	x	x	CRC, regional stakeholders, local governments, DCA, EDA	Long

2. Implementation

5. Resilience

Reduce vulnerabilities and strengthen the resilience of the region through both steady-state and responsive initiatives.

Objective	Action Item	Performance Evaluation Schedule					Responsible Party	Time Frame
		2023	2024	2025	2026	2027		
Engage in comprehensive planning efforts that promote a community vision of resilience through associated planning efforts such as HMPs and climate action strategies.	Identify gaps in local government resilience planning.	x	x				CRC	Short
	Assist in local government resilience planning where necessary.	x	x	x	x	x	CRC, local governments	Long
Create and maintain a resilience network of regional stakeholders to collaborate and advise on existing economic vulnerabilities in the region.	Identify economic resilience stakeholders in the region.	x	x	x			CRC, regional stakeholders, local governments	Short
Encourage a more economically diverse region.	Identify policies and programs to promote economic diversity in the region and reflect the changing economy and society.	x	x	x	x	x	CRC	Mid

Appendix



- A. Housing
- B. COVID-19
- C. Commuting

A. Housing

Average Household Size 2017-2026			
	2017	2021	2026
Bryan County	2.83	2.81	2.81
Bulloch County	2.56	2.55	2.55
Camden County	2.67	2.65	2.64
Chatham County	2.47	2.45	2.46
Effingham County	2.87	2.84	2.84
Glynn County	2.47	2.44	2.43
Liberty County	2.72	2.7	2.69
Long County	2.81	2.79	2.78
McIntosh County	2.37	2.36	2.36
Screven County	2.52	2.51	2.5
Coastal Region	2.57	2.56	2.56
Georgia	2.64	2.63	2.63

Source: ESRI Business Analyst Online

Cost-Burdened Housing Owner Occupied Units with a Mortgage		
	2016	2019
Bryan County	23.50%	29.80%
Bulloch County	26.60%	24.00%
Camden County	36.30%	26.00%
Chatham County	36.00%	32.70%
Effingham County	25.80%	24.20%
Glynn County	34.80%	29.80%
Liberty County	38.10%	29.50%
Long County	25.60%	23.00%
McIntosh County	39.90%	36.00%
Screven County	37.30%	26.80%
Coastal Region	35.70%	29.60%

Source: U.S. Census

Housing Move-In Years 2015-2019		
	Estimated Occupied Housing Units	Percent
Moved in 2017 or later	35042	13.30%
Moved in 2015 to 2016	50591	19.20%
Moved in 2010 to 2014	64193	24.30%
Moved in 2000 to 2009	58896	22.30%
Moved in 1990 to 1999	28713	10.90%
Moved in 1989 or earlier	26505	10.00%
Total	263940	100%

Source: U.S. Census

Age of Housing 2015-2019		
	Estimated Housing Units	Percent
2014 or later	10017	3.80%
2010 to 2013	12108	4.60%
2000 to 2009	55725	21.10%
1980 to 1999	92592	35.10%
1960 to 1979	53322	20.20%
1940 to 1959	26522	10.00%
1939 or earlier	13654	5.20%
Total	263940	100%

Source: U.S. Census

A. Housing

Cost-Burdened Housing Renter Occupied Units		
	2016	2019
Bryan County	48.50%	48.30%
Bulloch County	62.70%	48.60%
Camden County	43.70%	43.50%
Chatham County	54.60%	45.50%
Effingham County	42.00%	42.10%
Glynn County	49.00%	43.50%
Liberty County	52.00%	46.50%
Long County	47.50%	51.70%
McIntosh County	49.30%	44.10%
Screven County	49.20%	34.00%
Coastal Region	53.90%	45.50%
Source: U.S. Census		

Renter Occupied Housing Expenditures		
	Average Amount Spent	Percent
Rented Housings	\$4,515.08	100%
Rent	\$4,407.67	97.60%
Renters Insurance	\$31.09	0.70%
Maintenance and Repair Services	\$50.11	1.10%
Maintenance and Repair Materials	\$26.21	0.60%
Source: ESRI Business Analyst Online		

Owner Occupied Housing Expenditures		
	Average Amount Spent	Percent
Owned Housings	\$11,309.70	100%
Mortgage Interest	\$2,695.75	23.80%
Mortgage Principal	\$1,926.34	17.00%
Property Taxes	\$1,993.51	17.60%
Homeowners Insurance	\$513.01	4.50%
Ground Rent	\$59.76	0.50%
Maintenance and Remodeling Services	\$2,296.16	20.30%
Maintenance and Remodeling Materials	\$521.45	4.60%
Property Management and Security	\$94.81	0.80%
Source: ESRI Business Analyst Online		

B. COVID-19

Manufacturing (31-33) Gross Domestic Product in Millions					
Area	2016	2017	2018	2019	2020
Coastal Region	4885.7	5287.5	5962.6	5874.2	5363.9
Georgia	58691.8	60150.9	62375.3	61608.7	59534.9

Source: JobsEQ by Chmura Economics

Manufacturing (31-33) Total Wages in Millions									
Area	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1
Coastal Region	\$574.7	\$509.7	\$493.4	\$527.7	\$550.9	\$455.5	\$436.6	\$498.7	\$512.5
Georgia	\$6133.4	\$5738.1	\$5679.8	\$5991.3	\$6221.0	\$5127.7	\$5448.8	6270.0	6258.7

Source: JobsEQ by Chmura Economics

Manufacturing (31-33) Establishments					
Area	2016	2017	2018	2019	2020
Coastal Region	480	456	473	481	484
Georgia	10097	9747	9887	10069	10658

Source: JobsEQ by Chmura Economics

Manufacturing (31-33) Employment									
Area	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1
Coastal Region	27,112	27,132	27,190	27,066	26,720	24,868	24,277	24,439	24,867
Georgia	412,864	413,149	411,934	410,645	410,247	375,344	387,506	390,930	395,533

Source: JobsEQ by Chmura Economics

C. Commuting

2019 Inflow/Outflow Report		
	Count	Share
Employed in the Coastal Region	215509	100%
Employed in the Coastal Region but Living Outside (Inflow)	49264	22.90%
Employed and Living in the Coastal Region	166245	77.10%
Living in the Coastal Region	218245	100.00%
Living in the Coastal Region but Employed Outside (Outflow)	52000	23.80%
Employed and Living in the Coastal Region	166245	76.20%
Source: U.S. Census Onthemap		

2019 Commute Distance Home Census Block to Work Census Block		
	Count	Share
Total Private Primary Jobs	218,245	100.00%
Less than 10 miles	100,708	46.10%
10 to 24 miles	46,462	21.30%
25 to 50 miles	22,119	10.10%
Greater than 50 miles	48,956	22.40%
Source: U.S. Census Onthemap		