

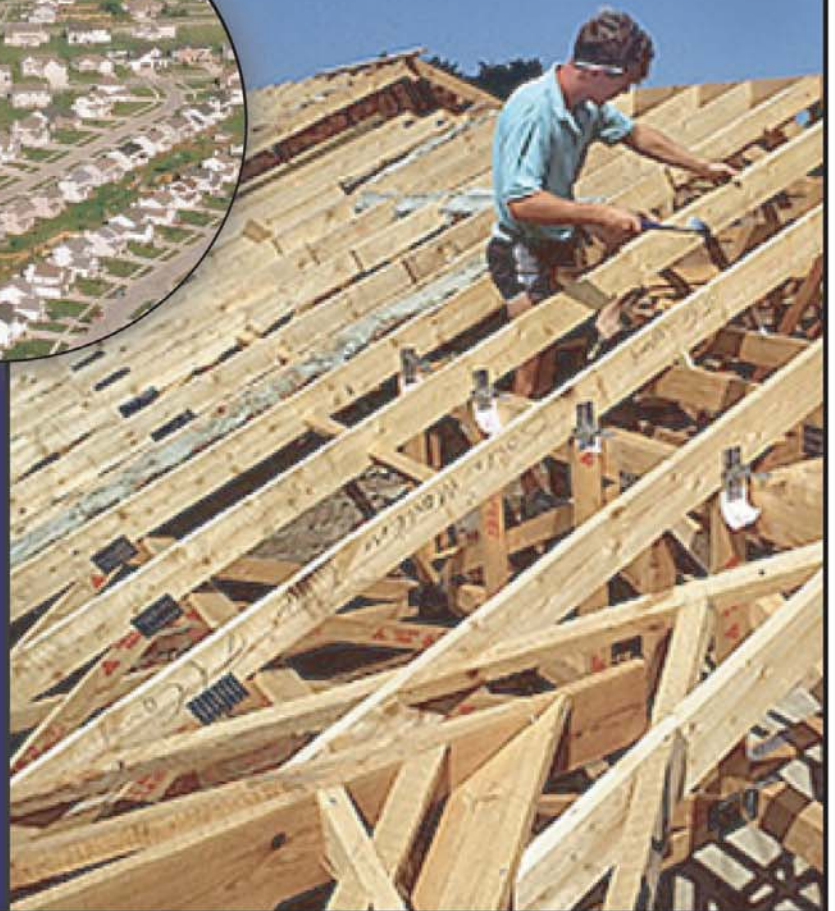


A Mid-Census Review of

Population Change and Development Activity

in the Central Midlands Region

2000 - 2004



Prepared By the Staff of
Central Midlands
Council of Governments

December 2005



EXECUTIVE SUMMARY

In the five years since the year 2000 decennial census, population growth and land development in the Central Midlands Region has occurred at admirable rates, particularly in a few well-defined “hot spots.” Richland and Lexington Counties have continued their historic rates of population expansion, but growth has been concentrated north of I-20, for the most part, in both counties. Map 1 (page ii) highlights these concentrations. Fairfield and Newberry Counties saw continued moderate growth levels during this period. The areas seeing the most growth in single family housing within the region are:

- Area 1 – Richland Northeast – 4,071 permits (18% of regional total)
- Area 2 – Lexington – 1,523 permits (6.7% of regional total)
- Area 3 – Irmo – 1,167 permits (5.2% of regional total)
- Area 4 – Red Bank – 1,061 permits (4.7% of regional total)
- Area 5 – Two Notch Road – 995 permits (4.4% of regional total)
- Area 6 – Garners Ferry Road – 912 permits (4% of regional total)

Altogether, these six areas constitute 43% of the region’s total single family housing permitted between 2000 and 2005.

The significant investment in highway infrastructure and in water and sewer utilities in Lexington and Richland Counties has made many areas at the fringes of these counties more attractive to developers. This appears to be a trend that will continue as commutes of up to an hour are acceptable to many home buyers.

New commercial permits are correlated strongly with areas of population growth. This is especially evident in and near the Town of Lexington, in Richland Northeast, and in Columbia. As shown in Table 1, total commercial permits since 2000 exceeded \$1 billion in value.

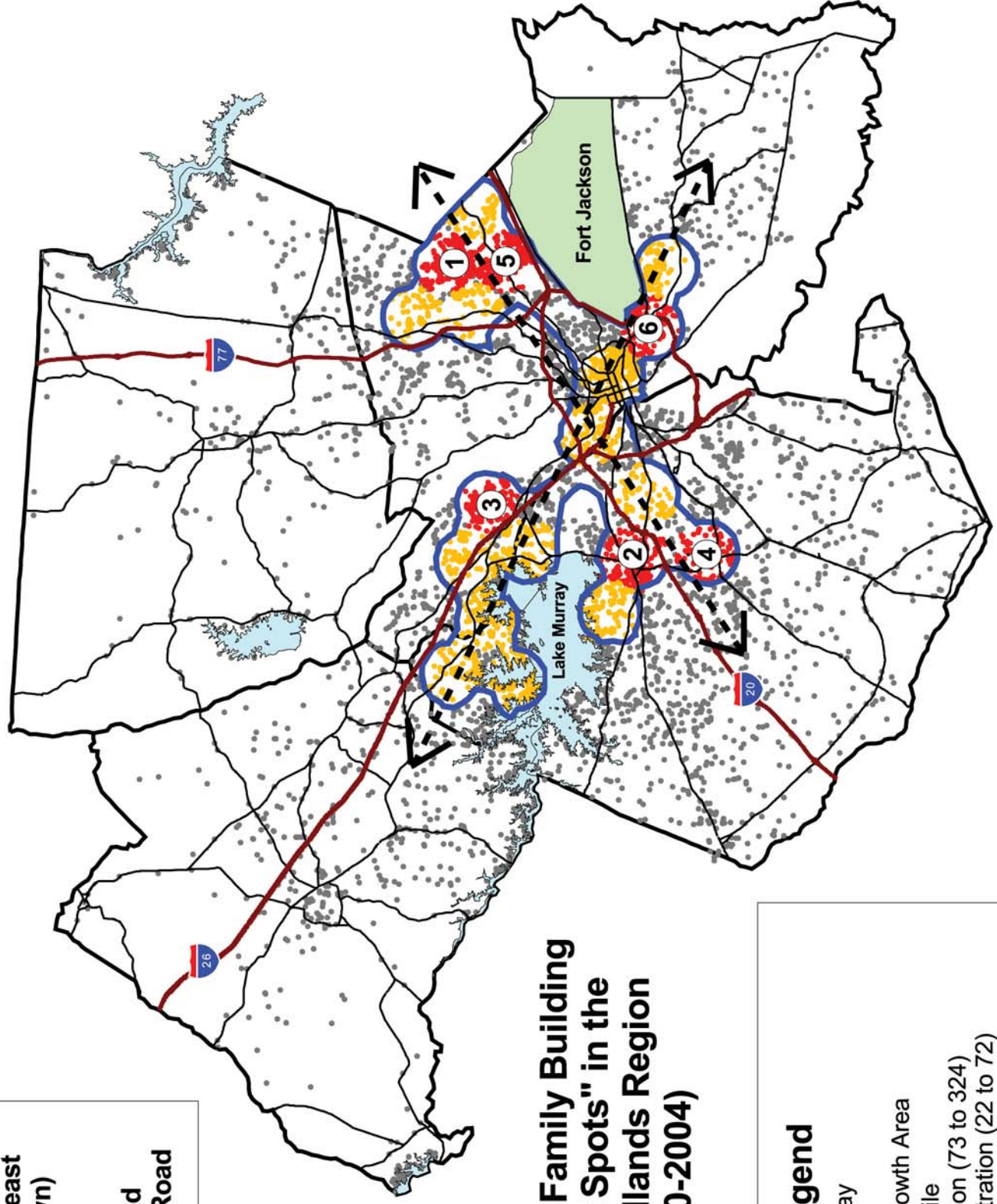
Table 1 - Commercial and Industrial Permits (2000-04)		
Location	Value of Commercial Permits	Value of Industrial Permits
Columbia	\$442,966,438	\$100,000
Richland County (minus Columbia)	\$315,914,200	\$6,252,381
Lexington County	\$387,877,517	\$16,914,693
Newberry County	\$35,863,172	\$12,510,984
Fairfield County	\$8,339,403	\$8,014,831
Total for Region:	\$1,190,960,730	\$43,792,889

Industrial business location decisions reflect a number of factors such as the location of industrial parks and industrial corridors, incentives from different levels of governments, and access to transportation. These factors seem to enhance the attractiveness of Fairfield County, eastern Newberry County, central and eastern Lexington County, and business districts near Williams-Brice Stadium, where most industrial permits have been issued over the past four years in the Central Midlands Region. The value of these permits was nearly \$44 million for this period.

Regional "Hot Spots"

1. Richland Northeast
2. Lexington (Town)
3. Irmo
4. Red Bank
5. Two Notch Road
6. Garners Ferry Road

Map 1: Single Family Building Permit "Hot Spots" in the Central Midlands Region (2000-2004)



Legend








-  Interstate Highway
-  Major Road
-  Concentrated Growth Area
-  Permits Per Square Mile
-  High Concentration (73 to 324)
-  Medium Concentration (22 to 72)
-  Low Concentration (Less than 22)

Table of Contents

	<u>Page #</u>
Executive Summary	i
Introduction	1
Section I – Population and Housing Trends within the Region	3
Section II – Distribution of Commercial and Industrial Development Activity	16
Conclusion	17
Data Sources	21

List of Tables

1. Commercial and Industrial Permits (2000-04)	i
2. Population Change by Locality in the Central Midlands Region	4
3. Regional “Hot Spots” for Single Family Permits	5
4. Percentage of Population Change by Municipality	6
5. Building Permits Summed from 2000 to 2004 by Planning Sector	7
6. Commercial and Industrial Permits (2000-04)	16

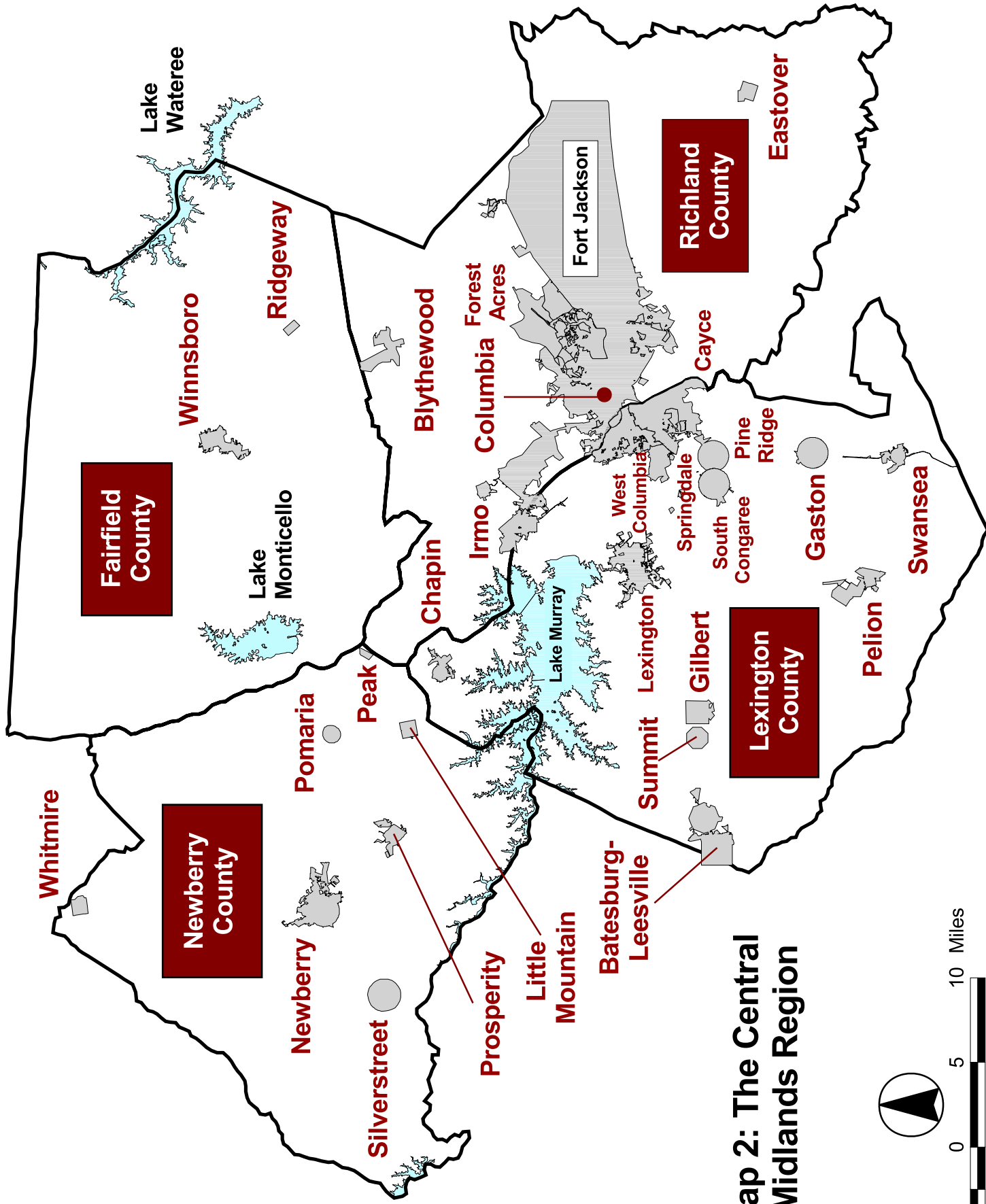
List of Maps

1. “Hot Spots” of Single Family Housing, by Permit (2000-2004)	ii
2. The Central Midlands Region	2
3. 2000-2004 Population Change, by Municipality and County	8
4. 2000-2004 Single Family Housing Permits	9
5. “Hot Spots” of Single Family Housing, by Permit (2000-2004)	10
6. Central Midlands Region Planning Sectors	11
7. 2000-2004 Single Family Housing Units Permitted, by Sector	12
8. 2000-2004 Multi-Family Housing Units Permitted, by Sector	14
9. 2000-2004 Multi-Family Housing, by Permit	15
10. 2000-2004 Commercial Building Permitted, by Sector	18
11. 2000-2004 Commercial Building, by Permit	19
12. 2000-2004 Industrial Building, by Permit	20

INTRODUCTION

Now that the 2005 mid-point between the 2000 and the 2010 Censuses of Population and Housing has passed, it is timely to review population and development trends within the four counties of the Central Midlands.

This report will identify trends in both population growth and land development (housing, commercial and industrial). Population growth will be shown at the city and county level, using census estimates. Development trends will be examined using building permit data. The report will identify those Planning Sectors throughout the four counties that are growing the fastest and those that are experiencing more moderate growth. These Planning Sectors are shown on Map 6, located on page 11.



**Map 2: The Central
Midlands Region**

SECTION I - POPULATION AND HOUSING TRENDS WITHIN THE REGION

The Central Midlands Region has grown rapidly in recent decades. From 1970 to 2000, the population of the region grew from 372,000 to 596,000 (a 60% increase), with most of this occurring in Richland and Lexington Counties. By comparison, statewide growth during the same period was only 35%. Richland County grew by 27% and Lexington County by 59%. The counties of Newberry and Fairfield had growth rates of 19% and 15%, respectively, during this same period.

Through annexations and residential construction, the population of Blythewood in northeast Richland County has soared both in percentage terms and in absolute numbers, from 164 in 1990 to 464 in 2004 (a 273% increase). Older and more established municipalities within the region have seen much more modest population growth during this same period. Notably, both Fairfield County and Newberry Counties are maintaining their slow but steady growth in both absolute and percentage terms. This trend is projected to continue, but populations in both counties are projected to increase at a faster rate over the next five to ten years.

The focus of this analysis, however, is on what has happened more recently and outlines where growth has occurred within each county. Table 2 on page 4 shows the population changes by county and by municipality in each county in 1990, 2000 and 2004, the most recent year for which population estimates from the Census Bureau are available.

Table 2 shows that the localities gaining the most population from 2000 to the summer of 2004 were Richland County, Lexington County and the Town of Lexington. These trends are visually displayed in Map 3 on page 8. Those municipalities that have lost population since 2000 include Forest Acres, Irmo, Arcadia Lakes and West Columbia. The total number of housing units has actually risen in each municipality, but household size declined during this period, resulting in a decline in the population estimate for these communities.

The population trends at the county level are only shown at two levels on Table 2 and Map 3 – within the county’s municipalities and in the unincorporated area as a whole. Areas within the unincorporated areas of the county that have had strong population growth since 2000 are not reflected in either Table 2 or Map 3. In order to bridge this gap, the report makes use of building permit data for the last five years.

Map 4 on page 9 shows total single-family building permits issued between 2000 and 2004. By looking a little deeper, to try to determine where permits are concentrated, some clear patterns emerge. Map 5 on page 10 shows six different “hot spots” within the region, where the greatest concentrations of single-family housing construction occurred during the last five years. These “hot spots” are defined as those areas within a two-mile radius that had between 73 and 324 single-family housing construction permits per square mile issued since January 1, 2000. More detailed information about the six “hot spots” is provided in Table 3 on page 5.

Table 2: Population Changes by Locality in the Central Midlands Region (1990 to 2000 to 2004)					
County and Locality	1990 Population	2000 Population	2004 Population	Pop Change 2000 to 2004	% Pop Change 2000 to 2004
Fairfield County	22,295	23,454	24,142	688	2.9
Incorporated areas	3,882	3,927	3,955	28	0.7
Unincorporated areas	18,413	19,527	20,187	660	3.4
Ridgeway	407	328	328	0	0.0
Winnsboro	3,475	3,599	3,627	28	0.8
Lexington County	167,611	216,014	231,057	15,043	7.0
Incorporated areas	40,820	50,997	54,465	3,468	6.8
Unincorporated areas	126,791	165,017	176,592	11,575	7.0
Batesburg-Leesville	5,722	5,517	5,547	30	0.5
Cayce	11,163	12,150	12,418	268	2.2
Chapin	282	628	665	37	5.9
Gaston	984	1,304	1,390	86	6.6
Gilbert	324	500	542	42	8.4
Town of Lexington	3,289	9,793	12,610	2,817	28.8
Pelion	336	553	580	27	4.9
Pineridge	1,731	1,593	1,683	90	5.6
South Congaree	2,406	2,266	2,322	56	2.5
Springdale	3,226	2,877	2,895	18	1.1
Summit	242	219	240	21	9.6
Swansea	527	533	544	11	2.1
West Columbia	10,588	13,064	13,029	-35	-0.3
Newberry County	33,172	36,108	37,209	1,101	3.0
Incorporated areas	14,096	13,848	14,051	203	1.5
Unincorporated areas	19,076	22,260	23,158	898	4.0
Little Mountain	235	255	259	4	1.6
City of Newberry	10,542	10,580	10,700	120	1.1
Peak	78	61	62	1	1.6
Pomaria	267	177	180	3	1.7
Prosperity	1,116	1,047	1,101	54	5.2
Silverstreet	156	216	222	6	2.8
Whitmire	1,702	1,512	1,527	15	1.0
Richland County	285,720	320,677	334,609	13,932	4.3
Incorporated areas	118,404	139,989	139,881	-108	-0.1
Unincorporated areas	167,316	180,688	194,728	14,040	7.8
Arcadia Lakes	899	882	838	-44	-5.0
Blythewood	164	170	612	442	260.0
Columbia	98,052	116,278	116,331	53	0.05
Eastover	1,044	830	792	-38	-4.6
Forest Acres	7,197	10,558	10,127	-431	-4.1
Irmo	11,048	11,271	11,181	-90	-0.8
Sources: Census Population for 1990 and 2000 and estimates by the Census Bureau for July 2004					

Table 3 - Regional "Hot Spots" for Single Family Permits				
Hot Spots	Area	# of Single Family Permits	Permits per Square Mile	% of Region's Permits
Area 1	Richland NE	4,071	324	18.0%
Area 2	Lexington	1,523	121	6.7%
Area 3	Irmo	1,167	93	5.2%
Area 4	Red Bank	1,061	84	4.7%
Area 5	Two Notch Road	995	79	4.4%
Area 6	Garners Ferry Road	912	73	4.0%
Totals:		9,729	775	43.0%

In addition to these “hot spots,” Map 5 highlights secondary concentrations of single-family building permits. A blue line was drawn around the high and medium concentrations of single-family permits, revealing an “X” type structure of residential development, with the center of the “X” lying near Dutch Square Mall. Transportation facilities, utility availability and affordable land are some of the factors that are promoting residential development outward from Columbia, on a northwest to southeast axis from Chapin through Columbia east along Garners Ferry Road, and a second axis along a northeast to southwest corridor, from the Richland/Kershaw County line through Columbia to the west and south of the Town of Lexington.

Another way to analyze the building permit data is by Planning Sector. These 34 Planning Sectors are a consolidation of the 133 census tracts within the region, to simplify demographic analyses done by the Central Midlands COG. These are shown on Map 6 on page 11. Map 7 displays single-family permits by Planning Sector, along with the same “X” overlaid on it as that on Map 5. This map also shows municipalities, ranked by percentage of population growth since 2000, as compared to the median for the region, which was 2.1%. This number was determined by ranking population growth for both cities and counties, by percentage, in descending order and then calculating the median, (or mid-way point) between these numbers.

When single-family permits grouped by Planning Sector and municipalities ranked by population growth are combined together, they display a population shift to the outer areas of the region, both in municipalities such as Pelion, Summit and Gilbert, and in the unincorporated areas around these communities. The Town of Prosperity in Newberry County also reflects this population shift.

Table 4: Percentage Population Change by Municipality (2000-2004)			
County and Locality	2000 Population	2004 Population	% Pop Change 2000 to 2004
Blythewood	170	612	260.0
Town of Lexington	9,793	12,610	28.8
Summit	219	240	9.6
Gilbert	500	542	8.4
Gaston	1,304	1,390	6.6
Chapin	628	665	5.9
Pine Ridge	1,593	1,683	5.6
Prosperity	1,047	1,101	5.2
Pelion	553	580	4.9
Silverstreet	216	222	2.8
South Congaree	2,266	2,322	2.5
Cayce	12,150	12,418	2.2
Swansea	533	544	2.1
Pomaria	177	180	1.7
Peak	61	62	1.6
Little Mountain	255	259	1.6
City of Newberry	10,580	10,700	1.1
Springdale	2,864	2,895	1.1
Whitmire	1,512	1,527	1.0
Winnsboro	3,599	3,627	0.8
Batesburg-Leesville	5,517	5,547	0.5
Columbia	116,278	116,331	0.0
Ridgeway	328	328	0.0
West Columbia	13,064	13,029	-0.3
Irmo	11,271	11,181	-0.8
Forest Acres	10,558	10,127	-4.1
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Sources: Census Population for 1990 and 2000 and estimates by the Census Bureau for July 2004			

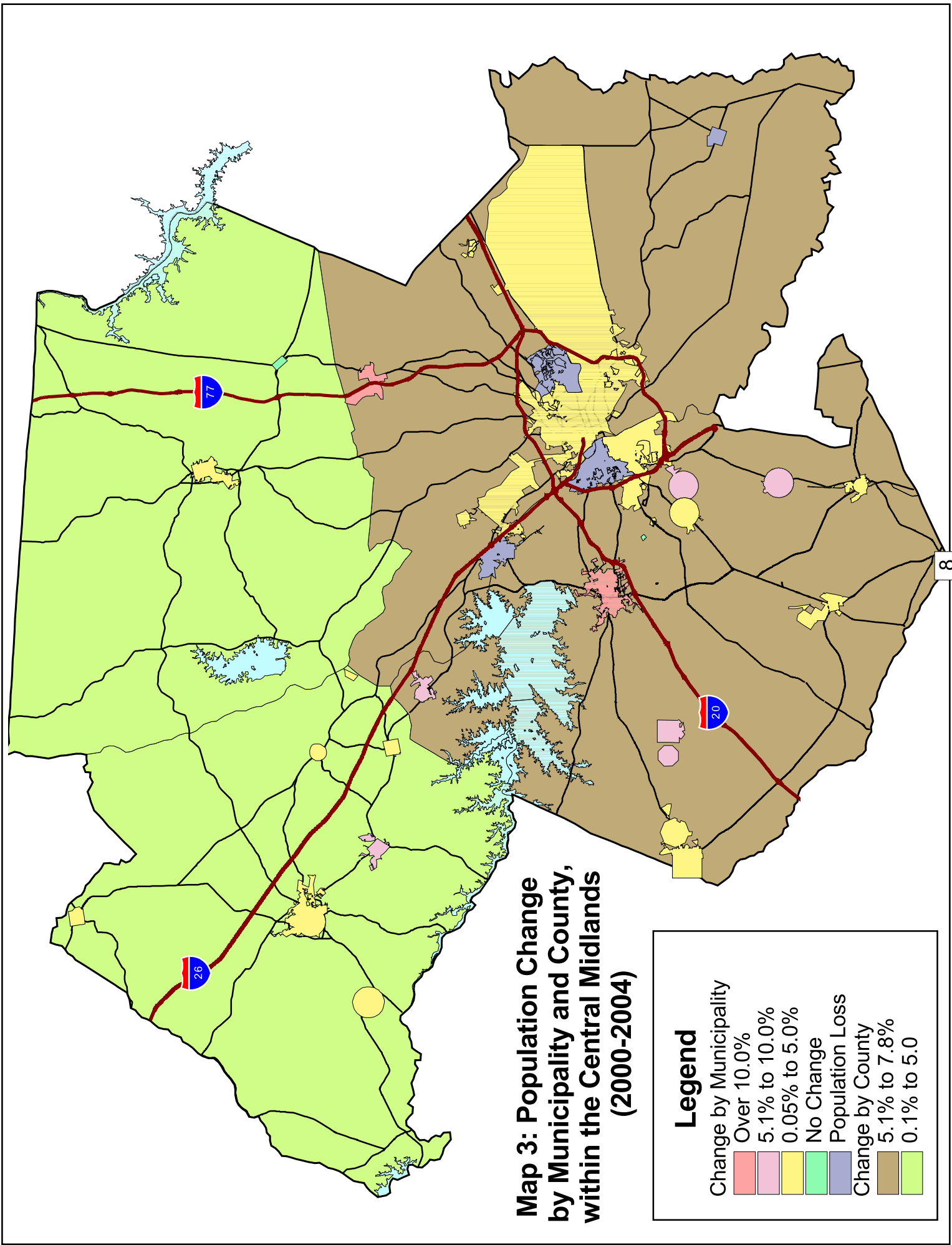
This outward movement of population may foreshadow future housing trends within the region. Table 3 on page 6 shows the percentage of population change, by municipality, from 2000 to 2004, from greatest to least increase, as well as those cities that lost population. This population shift is not yet reflected in the number of housing permits being issued, meaning newcomers are purchasing existing housing stock rather than building homes. The strong housing construction boom around Columbia has not yet reached these outer areas. However, as this population increase within these outer edge municipalities takes more and more of the existing housing stock off of the market, new housing permits will be needed to meet this demand.

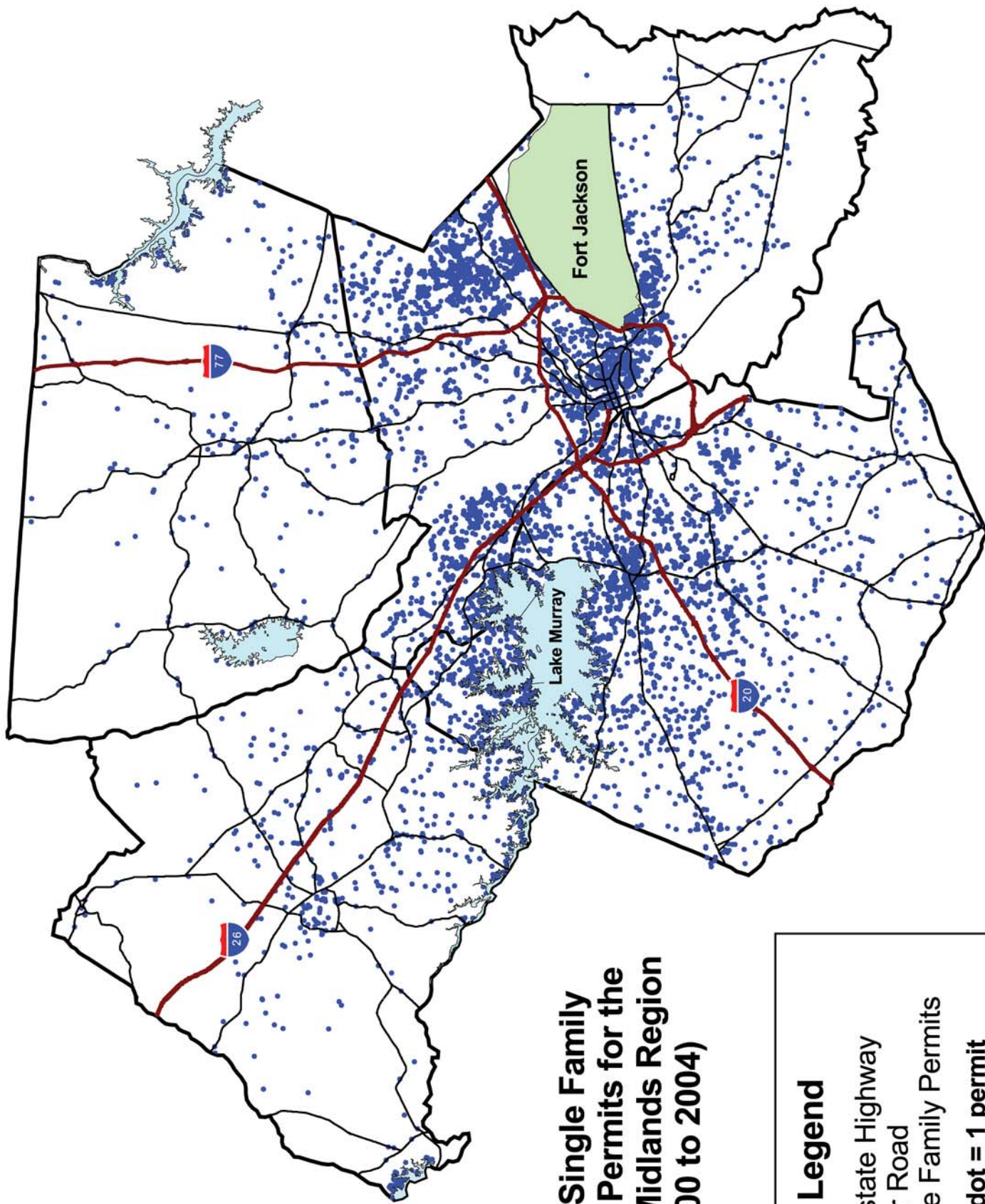
The significant level of development activity within the Central Midlands Region since 2000, including new single-family home construction, as well as multi-family, commercial and industrial, can be seen in Table 5, which lists these permits by Planning Sector. Table 5 corresponds directly with Map 6 on page 11, which graphically displays where these Sectors are located.

As this report analyzes all development activity within the region, permits for commercial, industrial, and multi-family dwellings are also included in Table 5.

Table 5: Building Permits by Planning Sector (2000-04)					
Planning Sector	Commercial	Industrial	Multi-Family	Single-Family	Total
1	261	0	16	68	345
2a	127	0	44	1,250	1,421
2b	83	4	25	22	134
3a	102	0	1	136	239
3b	166	2	0	335	503
4a	146	0	30	360	536
4b	15	0	0	61	76
5a	84	0	9	97	190
5b	47	0	0	31	78
6a	129	1	13	283	426
6b	153	11	19	266	449
7a	10	0	0	244	254
7b	7	0	0	82	89
7c	12	1	0	67	80
8	5	0	0	17	22
9a	296	0	61	5,651	6,008
9b	52	0	36	1,779	1,867
9c	20	1	0	322	343
10a	121	0	26	2,981	3,128
10b	254	0	2	306	562
10c	42	1	0	1,097	1,140
11	300	7	186	4,289	4,782
12a	26	0	1	251	278
12b	19	0	0	209	228
12c	51	0	11	614	676
13a	39	0	2	567	608
13b	24	2	0	167	193
14	1	0	0	26	27
15	1	0	0	81	82
16	51	2	2	140	195
17	21	3	3	447	474
18	3	0	0	27	30
19	12	0	0	175	187
20	4	7	0	192	203
Total	2,684	42	487	22,640	25,853
Sources: Central Midlands Building Permit Surveys, 2000 to 2004 and GIS Mapped Permit Data prepared by CMCOG.					




* The 487 Multi-Family permits contain 3,671 dwelling units.





**Map 4: Single Family
Housing Permits for the
Central Midlands Region
(2000 to 2004)**

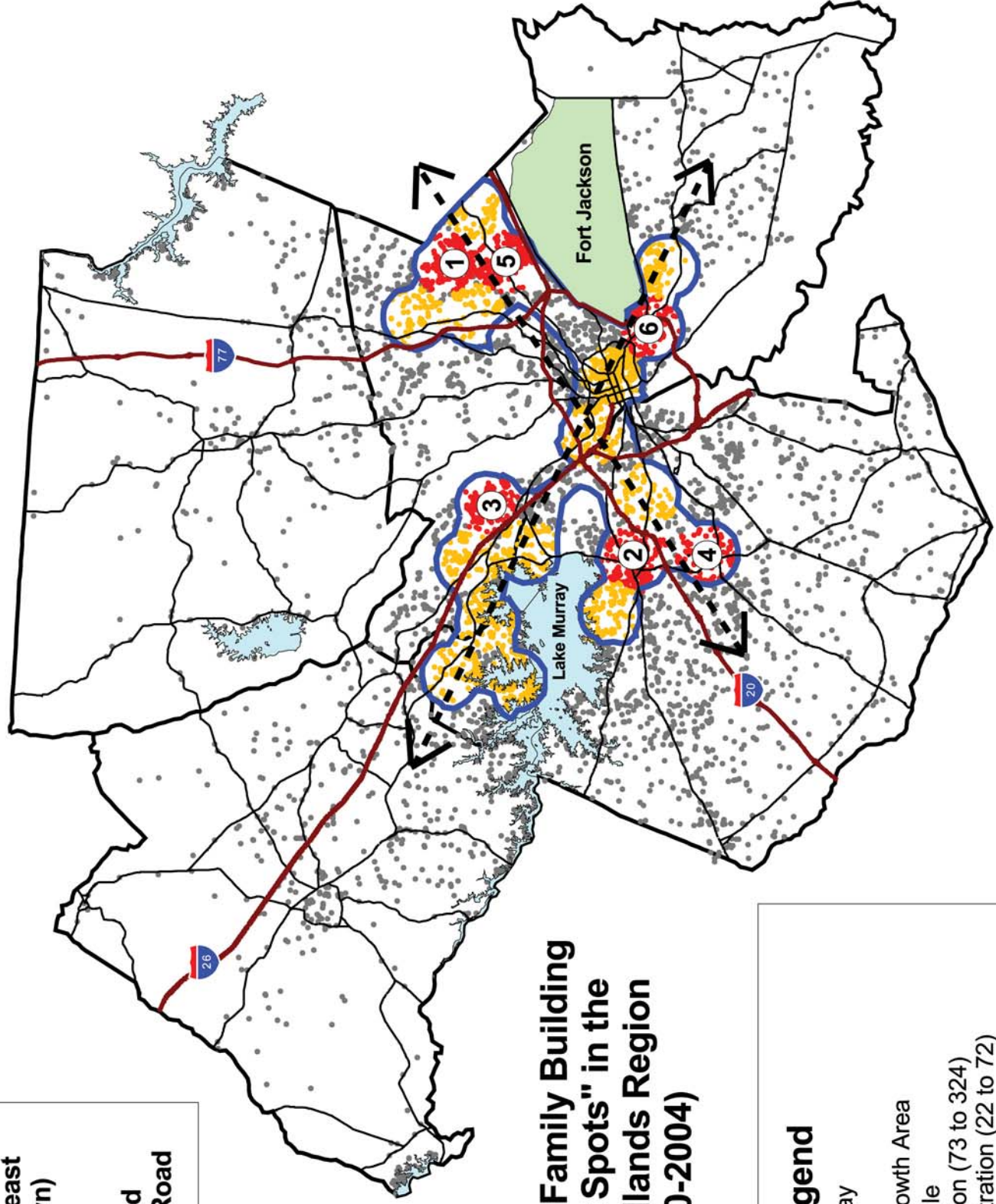
Legend

-  Interstate Highway
-  Major Road
-  Single Family Permits
- 1 dot = 1 permit

Regional "Hot Spots"

1. Richland Northeast
2. Lexington (Town)
3. Irmo
4. Red Bank
5. Two Notch Road
6. Garners Ferry Road

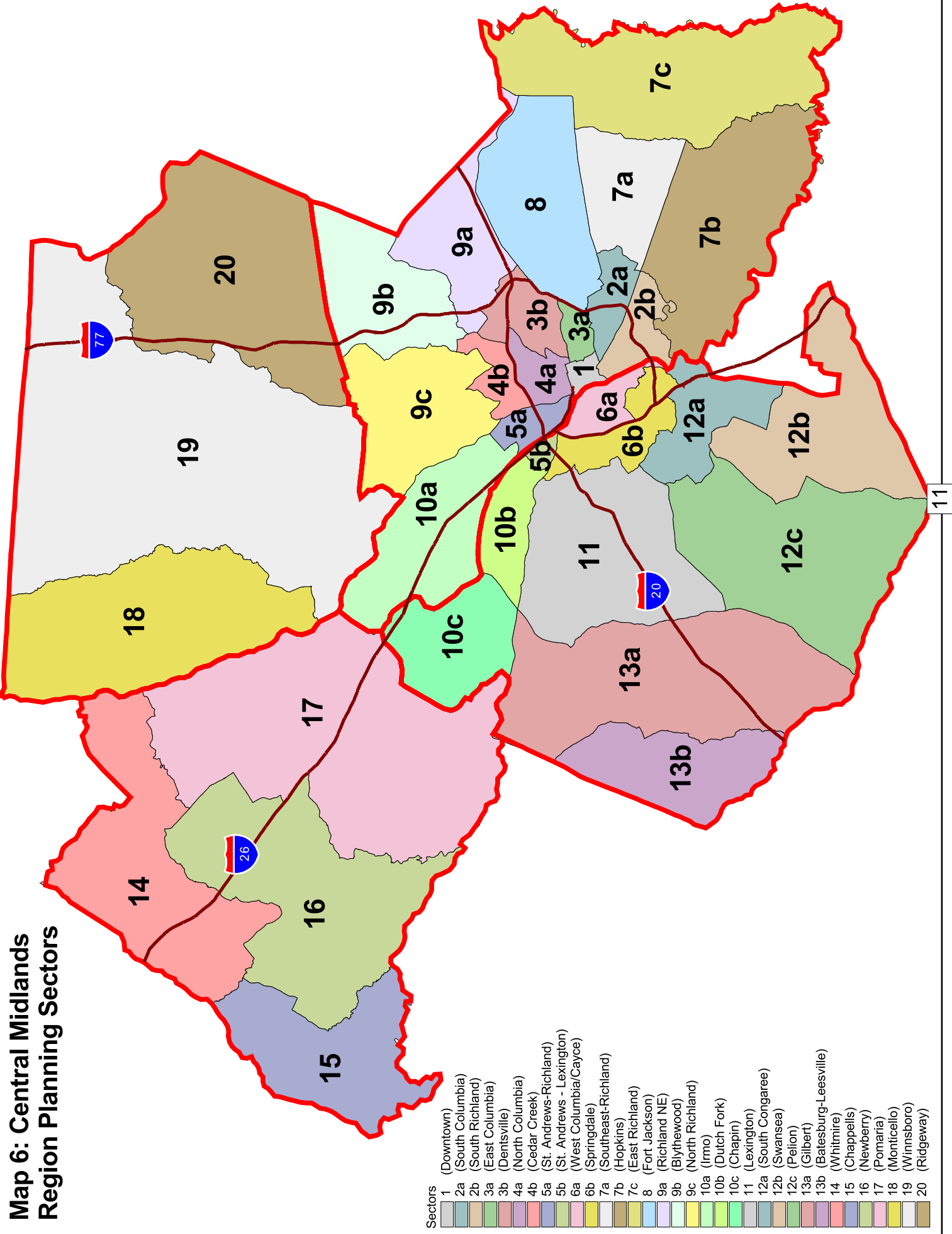
Map 5: Single Family Building Permit "Hot Spots" in the Central Midlands Region (2000-2004)

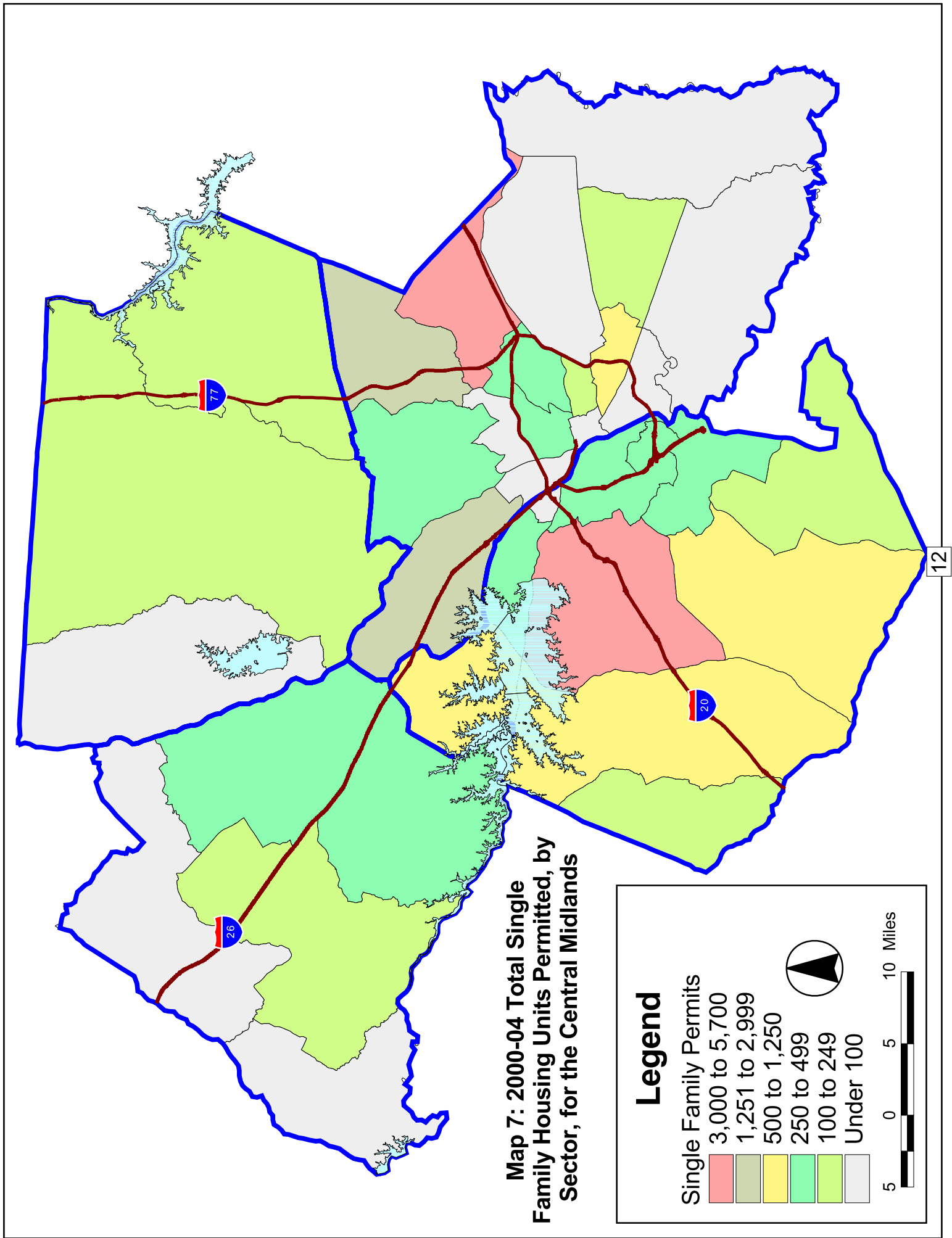


Legend

- Interstate Highway
- Major Road
- Concentrated Growth Area
- Permits Per Square Mile
- High Concentration (73 to 324)
- Medium Concentration (22 to 72)
- Low Concentration (Less than 22)

**Map 6: Central Midlands
Region Planning Sectors**





Single-Family Housing by County

Within **Lexington County**, housing permit activity has been strong throughout most of the county, with the Town of Lexington and the Red Bank areas showing the strongest development. Hot Spots 2 and 4 on Map 5 highlight this concentration around the Town of Lexington.

Richland County is experiencing strong housing permit activity north of Fort Jackson in Hot Spots 1 and 5. Housing activity in most of Richland Northeast to Blythewood has been strong and will likely continue for many years. Road access is improving, water and sewer are being extended, and the area possesses several high end developments like Lake Carolina. Again, interest in land south of Fort Jackson is also growing as shown in Hot Spot 6.

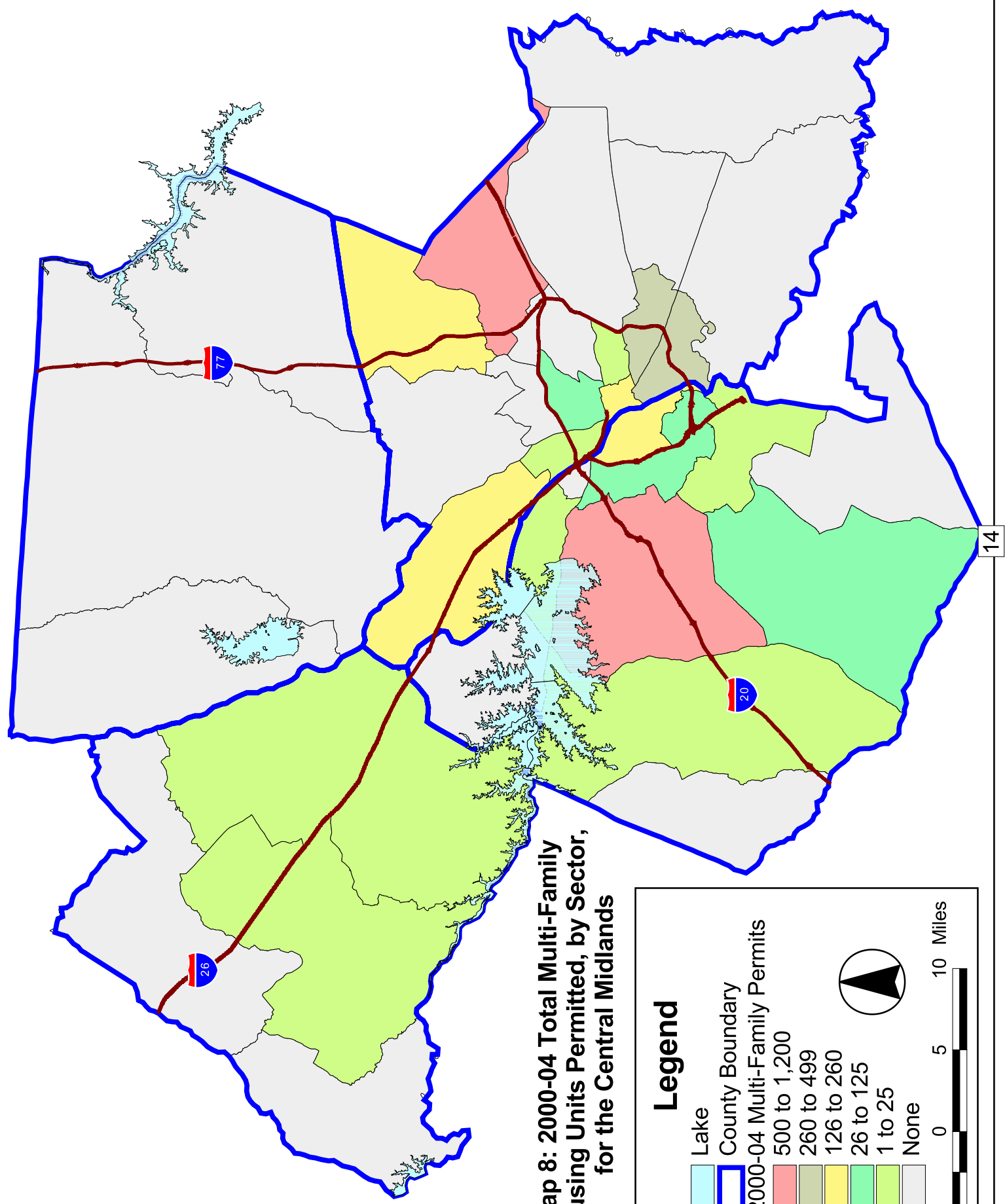
In **Newberry County**, there is a marked difference between the intensity of housing units permitted in the eastern portion of the county, southeast of Route 34 and in the western section from Chappells to Whitmire. Housing units permitted from 2000 to 2004, including portions of the Newberry Urbanized Area, totaled nearly 500. Map 7 shows that most housing units permitted within Newberry County lie in the Prosperity area and to the south, toward Lake Murray.

In **Fairfield County**, new permitted housing units have occurred in three areas: 1) near Lake Wateree, 2) along the Fairfield/Richland County line, and 3) around the Town of Winnsboro.

Multi-Family Housing

The distribution of multi-family units by Sector (Map 8, page 14) on the other hand, has both similarities to and differences from that of single-family housing units. In terms of similarities, when Maps 7 and 8 are compared, it can be seen that the highest levels of both single and multi-family development are taking place in the same two Sectors – the Town of Lexington and vicinity (Sector 11), and in Richland Northeast (Sector 9a). In addition, the Blythewood area, Richland Northwest and the Garners Ferry Road area south of Fort Jackson also had strong growth in both single and multi-family housing. Map 9 on page 15 shows these concentrations of multi-family housing by permit, particularly around the Town of Lexington.

The differences between Maps 7 and 8 are clearest in the region's rural areas. In Fairfield County, there were no multi-family permits issued during this period, and fewer than 50 in all of Newberry County. West Columbia and the area of Columbia nearest the Congaree River also showed much stronger concentrations of multi-family than single-family housing development during this period. Sector 2b (South Richland), between Garners Ferry Road and the Congaree River, also showed much stronger multi-family rather than single-family development during this period.

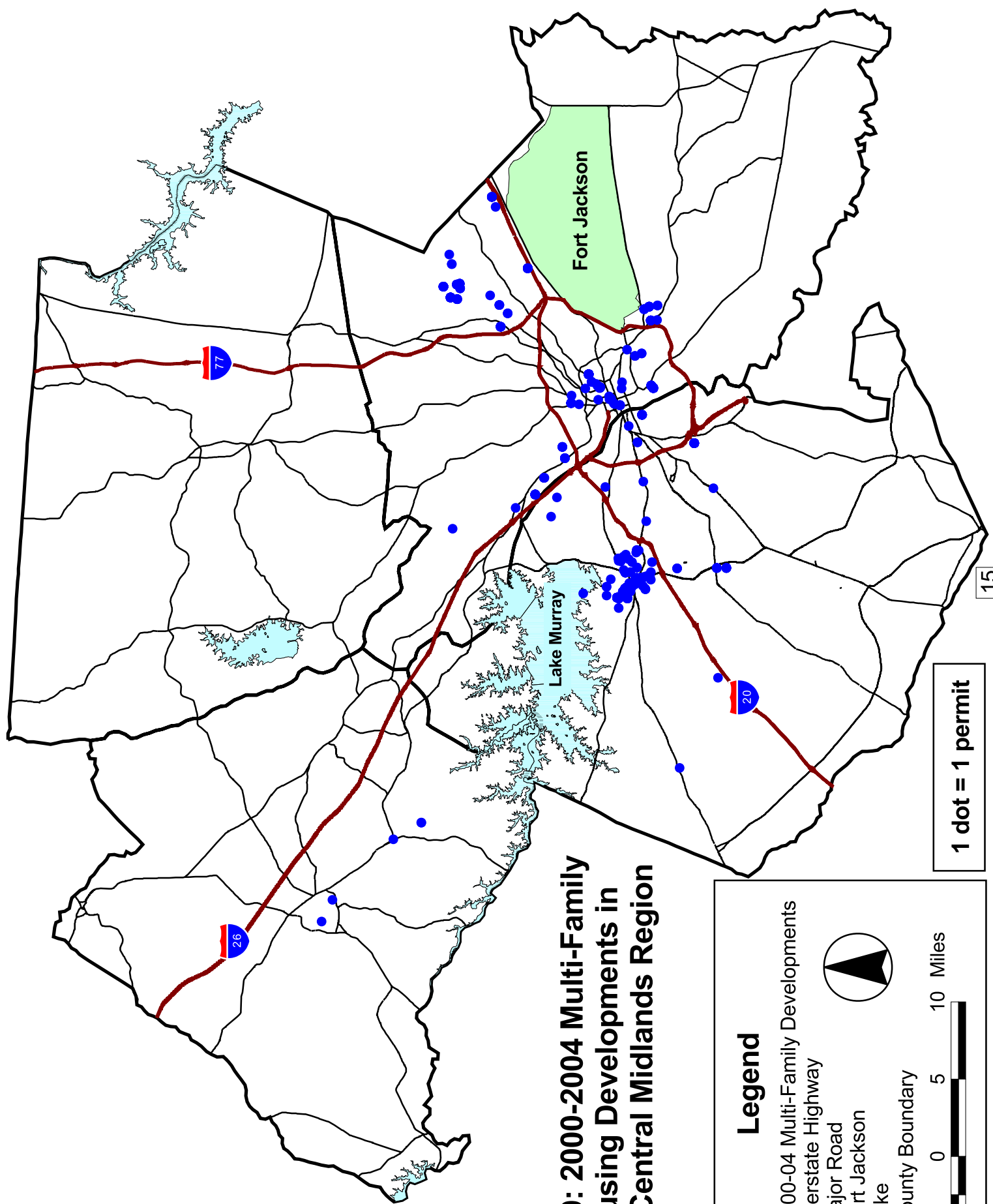


Map 8: 2000-04 Total Multi-Family Housing Units Permitted, by Sector, for the Central Midlands

Legend

- Lake
- County Boundary
- 2000-04 Multi-Family Permits
 - 500 to 1,200
 - 260 to 499
 - 126 to 260
 - 26 to 125
 - 1 to 25
 - None

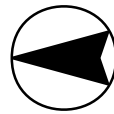
5 0 5 10 Miles



Map 9: 2000-2004 Multi-Family Housing Developments in the Central Midlands Region

Legend

- 2000-04 Multi-Family Developments
- Interstate Highway
- Major Road
- Fort Jackson
- Lake
- County Boundary



1 dot = 1 permit

SECTION II - DISTRIBUTION OF COMMERCIAL AND INDUSTRIAL DEVELOPMENT ACTIVITY

Commercial Development

Commercial permitting activity by Sector is shown on Map 10 (page 18) and relates to the information contained in Table 4. Areas of the region with strongest commercial development extend in a broad belt beginning in the west around Lexington, extending east through West Columbia and Cayce, through the historic commercial core of Columbia, through Forest Acres and east through Richland Northeast to the Kershaw County line. Commercial activity is also notable in the I-26 corridor northwest of Columbia and in the South Columbia area between the Congaree River and east along Garners Ferry Road to the southern approaches of Fort Jackson. The financial strength of this activity in Richland and Lexington Counties is shown on Table 6. Commercial growth has been more limited in Fairfield and Newberry Counties, with most occurring near the respective county seats of Winnsboro and the City of Newberry. The geographic distribution of these commercial permits within the region is shown on Map 11 (page 19).

Table 6 - Commercial and Industrial Permits (2000-04)		
Location	Value of Commercial Permits	Value of Industrial Permits
Columbia	\$442,966,438	\$100,000
Richland County (minus Columbia)	\$315,914,200	\$6,252,381
Lexington County	\$387,877,517	\$16,914,693
Newberry County	\$35,863,172	\$12,510,984
Fairfield County	\$8,339,403	\$8,014,831
Total for Region:	\$1,190,960,730	\$43,792,889

Industrial Development

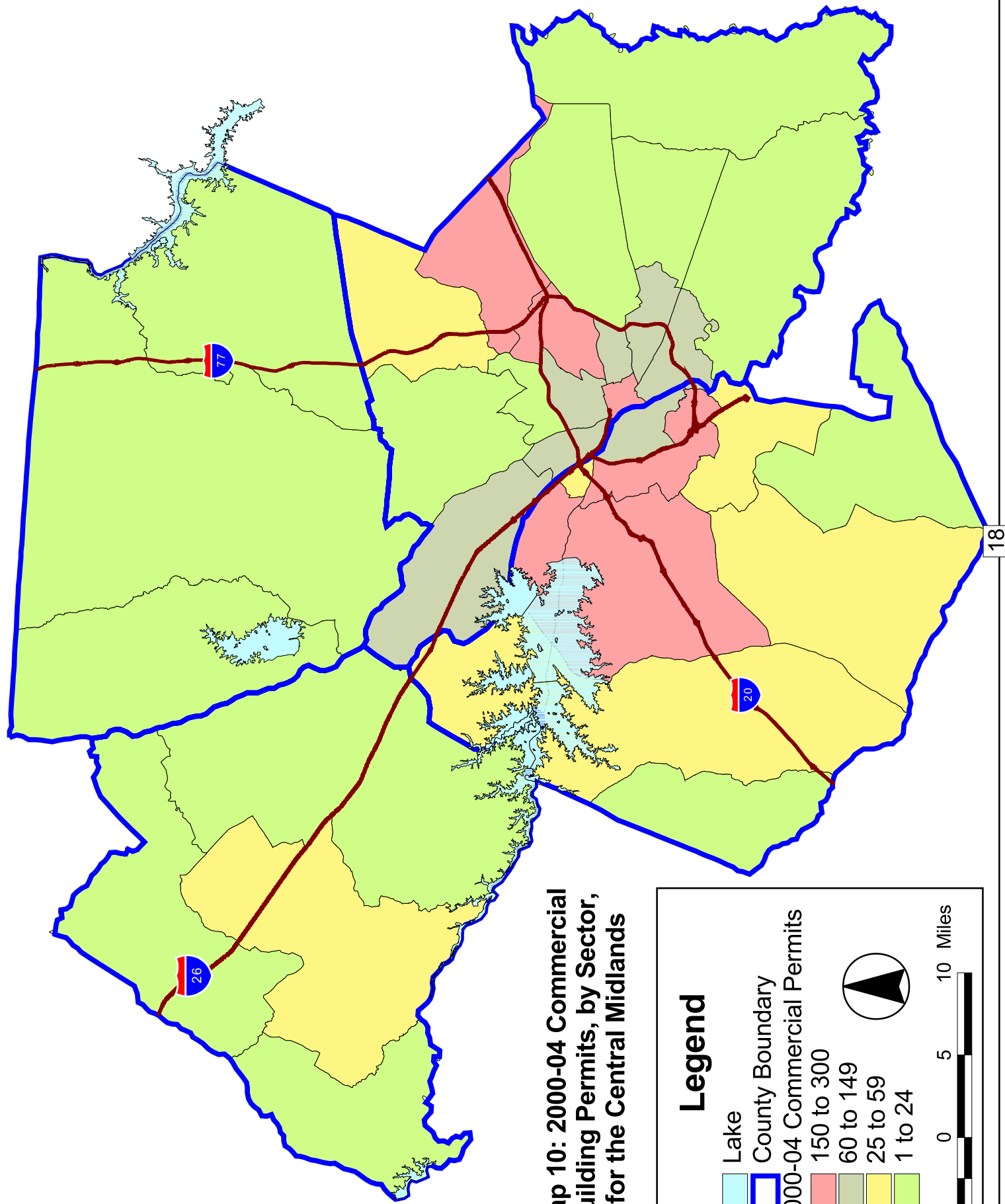
The location of industrial permitting activity within the region is shown on Map 12 (page 20). In the early years of this decade, industrial activity has been light in Richland County, mostly south of I-77, between Bluff and Garners Ferry Roads, but has shown some strength in Lexington County, between West Columbia and the Town of Lexington, near interstates 26 and 20. Table 6 displays the differences between these two counties, in terms of the value of industrial permits during this period.

To the north, industrial activity has picked up in the eastern sector of Newberry County and in the industrial parks concentrated around the I-77 and SC-34 interchange in Fairfield County, which is reflected on Map 12. The industrial growth within these two counties is shown on Table 6, with Newberry and Fairfield Counties seeing almost the same level of industrial activity (\$20.5 million) as Lexington and Richland Counties (\$23.3 million).

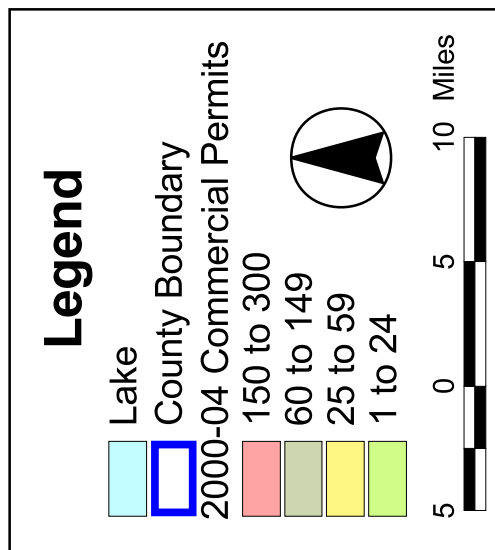
CONCLUSION

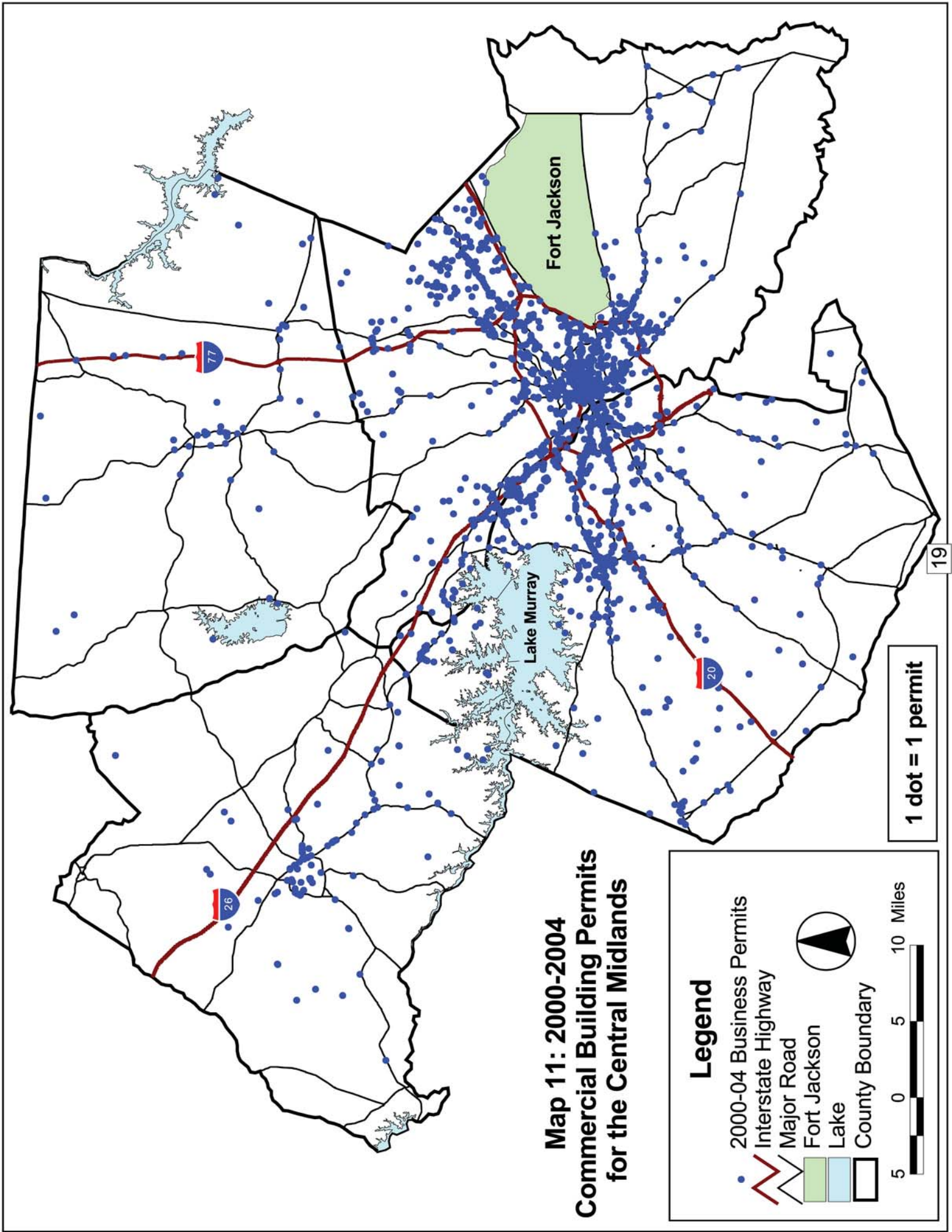
Since the 2000 U.S. Census, the Central Midlands region of South Carolina has seen notable increases in its population and housing stock, as well as in its commercial and industrial sectors. A significant portion of the increases in population and housing has occurred in two areas of the region: around the Town of Lexington and in Northeast Richland County. At the same time, there are indications that population growth is occurring beyond these core areas, towards southern and western Lexington County, as well as into the southern and eastern portions of both Newberry and Fairfield Counties. Commercial activity grew the most within the center of the region, with Columbia as the core, extending north to Irmo, west to the Town of Lexington and northeast to Kershaw County, along US-1 and I-20. Industrial growth occurred not only in Lexington County, between West Columbia and the Town of Lexington, but also to the north, in Newberry and Fairfield Counties. In all cases, it was located near interstates 26, 20 and 77.

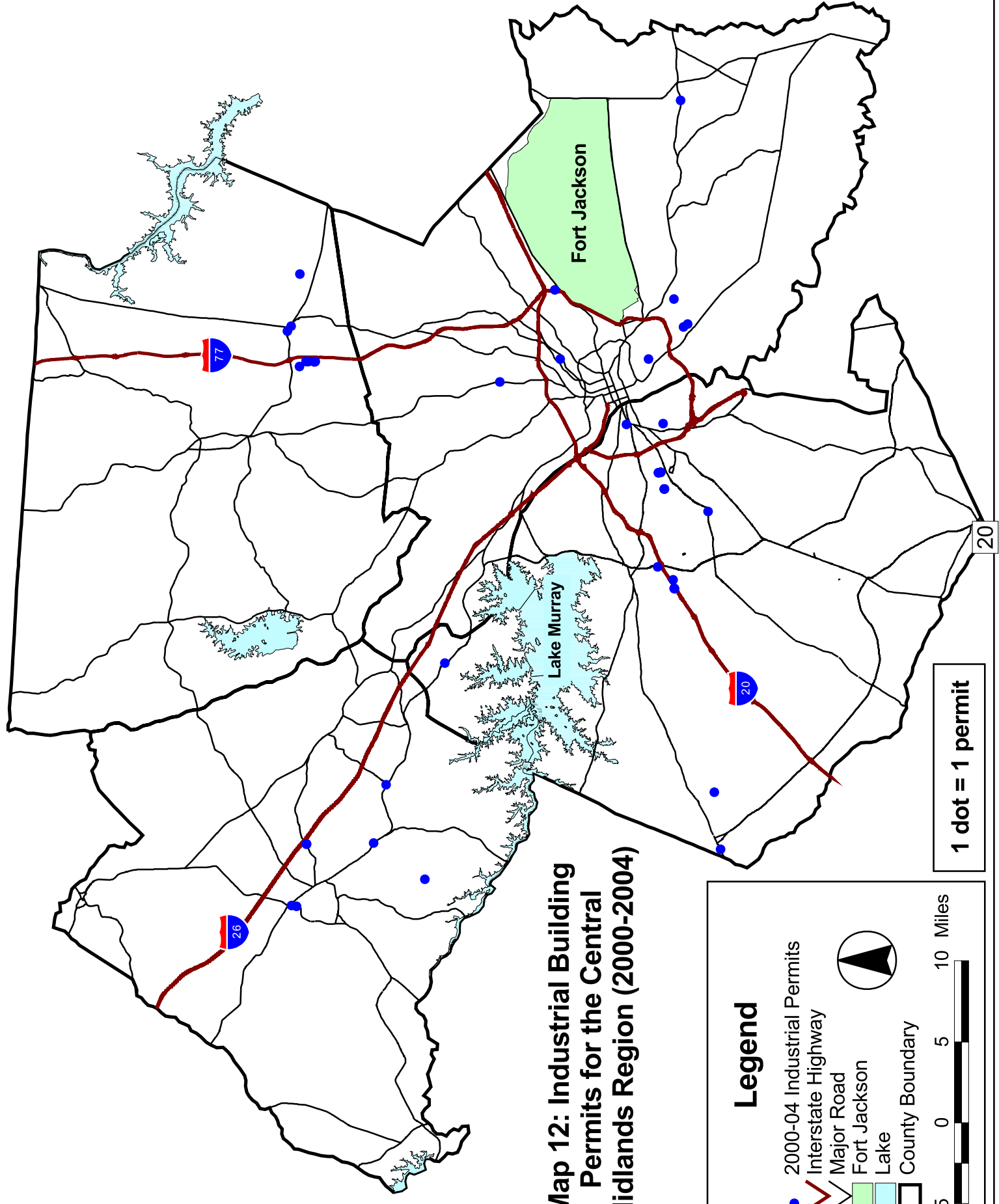
The next five years should see further enhancements of these trends, with strong population and new housing growth in the same core areas of the region, but also an increase in population and new housing on the outer edges of Lexington, Newberry and Fairfield Counties. Commercial activity will be strongest within the center of the region, from the Town of Lexington, through Columbia, out to Kershaw County, but will also begin to follow population growth occurring in western and southern Lexington County, as well as in southern and eastern Newberry and Fairfield Counties. Industrial growth is expected to continue around the different interstate highways within the region – near I-26 in Newberry County, I-20 in Lexington County, and I-77 in Richland and Fairfield Counties.



Map 10: 2000-04 Commercial Building Permits, by Sector, for the Central Midlands



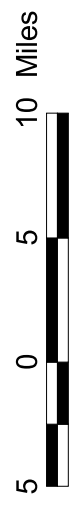
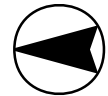




Map 12: Industrial Building Permits for the Central Midlands Region (2000-2004)

Legend

- 2000-04 Industrial Permits
- Red line Interstate Highway
- Black line Major Road
- Green box Fort Jackson
- Light blue box Lake
- Black outline County Boundary



1 dot = 1 permit

DATA SOURCES

The Central Midlands Council of Governments has published several titles that help track over time trends in population and types of construction by Planning Sectors. These publications are:

1. **Annual Estimates of the Population for Incorporated Places and Counties in South Carolina: April 2000 to July 2004.** This data is released by the Census Bureau annually and helps track population changes in units of local government across South Carolina. Population figures for the year 1990 are derived from Population and Housing Characteristics by Place, 2000 Census of Population, Central Midlands COG, 2002. (See Map 1 for the location of counties, cities, and towns within the region.)
2. **Central Midlands Region Building Permit Study.** This document is the result of an annual effort to collect and interpret building permits issued by local governments throughout the region. Building permits issued for additions and repairs on nonresidential structures are included if the value of the work exceeds \$25,000. Not included are permits issued for swimming pools, garages, carports and storage sheds on residential properties. Permits have been analyzed by year starting in 1975. They are presented by type of construction for each of the region's four counties and for the Columbia, SC Metropolitan Statistical Area (MSA) whose largest counties are Richland and Lexington Counties. Data are also tabularized by Planning Sector shown in Map 6.) Data is presented by Planning Sectors that are either individual census tracts or groups of census tracts.
3. **Comprehensive Economic Development Strategy for the Central Midlands Region of South Carolina** (Central Midlands COG, 2005). This document is revised every 5 years for continued participation of the Central Midlands COG as an Economic Development District so designated by the federal Economic Development Administration. It contains extensive information on the demography and economy of the region.