



REGION REPORT

**“Local
Solutions
to Regional
Problems”**

Fall 2003

Volume 1, Issue 2

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Welcome to the fall 2003 edition of the
CMCOG Region Report.

This issue of **Region Report** focuses on the Northwestern part of the Central Midlands region. The Northwest area has traditionally been one of the fastest growing parts of the region focused around Columbiana Centre and Harbison Boulevard. Comparisons with this area can be drawn with the Northeast area, which was the focus of our last Region Report, as both areas have similar characteristics. Both areas are suburban commercial hubs for their respective parts of the Columbia area, both have experienced tremendous residential growth and are home to some of the most desirable schools in the area. Similarly, as a result of being desirable communities in which to live, both areas continue to experience significant traffic problems.

Also in this section we would like to mention some of the different projects on which CMCOG staff are currently working. **The Central Midlands 208 Water Quality Management Plan** has just been released in its draft form and is available for review on our website. A **Rural Transportation Model** is currently under development to compliment the urban plan that was recently completed. Courtesy of a grant from FEMA, a **Pre-Disaster Mitigation Program** is being developed to identify vulnerable populations, the probability of a natural disaster strike and the location of available resources to handle the effects of a natural disaster within our region. Also, a grant application is currently under development to apply for a **Mobile GIS unit** (a \$14,000 value) from ESRI and Trimble, which would be used for a variety of projects at CMCOG and the Central Midlands Regional Transit Authority. Ten units will be awarded nationwide. The successful applicants will be announced at the end of November 2003.

We hope you find both this newsletter and our web site useful. If you have any suggestions regarding the content of this newsletter, please contact Ben Mauldin, Andy Simmons, or Evelyn Gealy at the following:

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To find out more about Central Midlands COG and the information presented, please visit our web site at:

www.centralmidlands.org

In Focus:

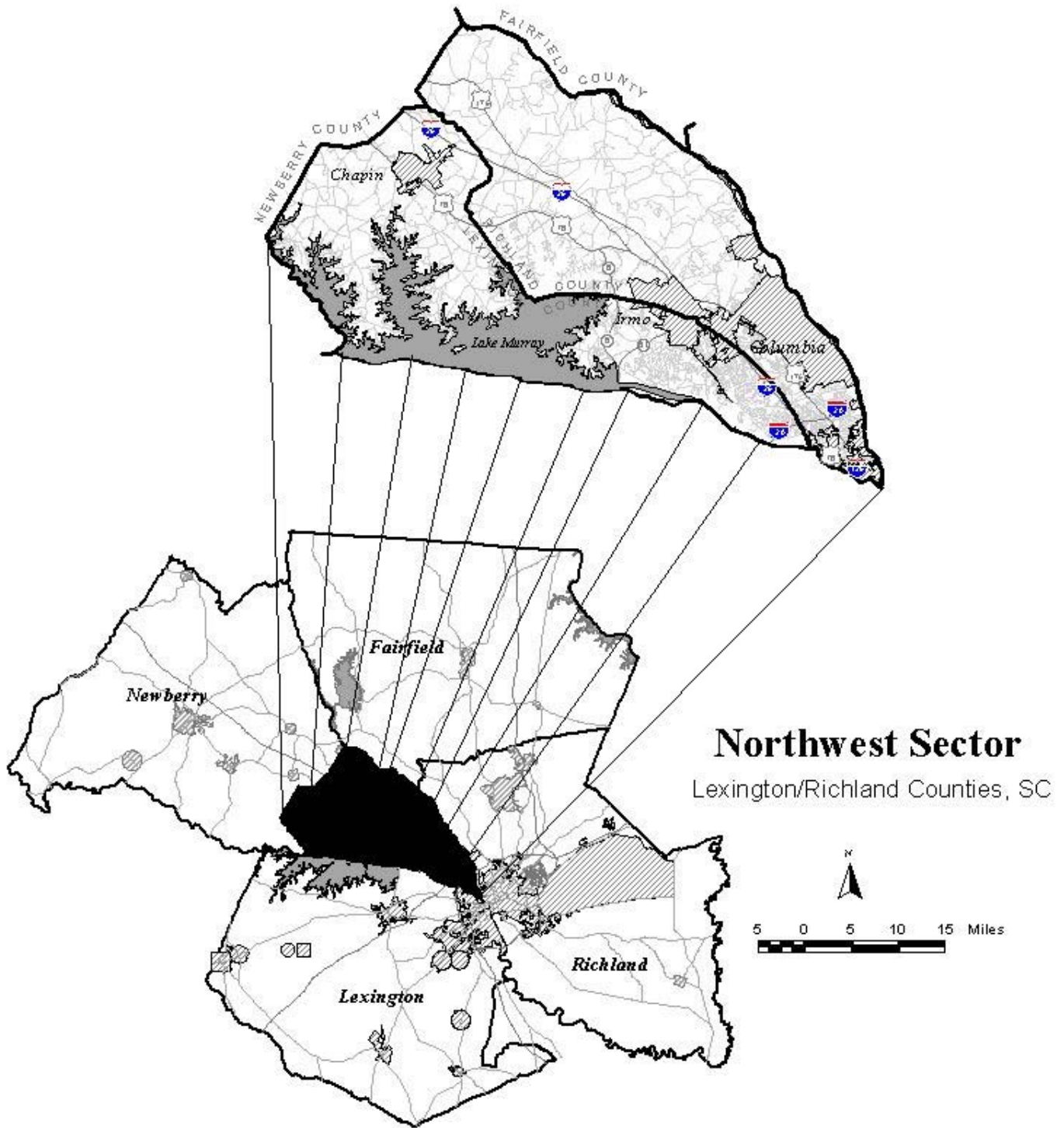


The Northwest

Market Area The Northwest area is located in the north West corner of Richland County and the north west portion of Lexington County and includes the Irmo, Chapin, St. Andrews and Dutch Fork areas. This area continues to be a fast growing residential area given its proximity to Lake Murray and the excellent area schools. Commercial and retail growth continues to be strong around Harbison Boulevard; the traditional suburban retail core of Columbia. The development pattern of recent years is expected to continue as a result of the recent home construction boom around Ballentine and Chapin. Further retail development is also expected east of I-26 around Kennerly Road.

The Economy In 1990, the civilian labor force for the North West area was 48,991. By 2000, the labor force in this sector had grown slightly to 56,970, an increase of 16.3%. At the same time, the population of the area grew by 23.6%, indicating that the growth in this sector can be

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Northwest Development Climate

CMCOG Market Areas

(Continued from page 1)

attributed to the influx of families with children. In 2000, just 2.8% of the labor force was unemployed, which is in line with the 2000 Lexington County rate of 2.5% and lower than the Richland county rate of 4.2%. Employment in the Northwest is divided as follows: Services - 46.8%; Wholesale/Retail Trade - 15%; Finance, Insurance, & Real Estate - 9.8%; Manufacturing - 8.1%; Government - 10.2%; Construction - 5.3%; Transportation - 4.6% and Agriculture/Mining - 0.2%.

The Northwest area is a desirable area for employers, particularly retail employers, due to the favorable demographics of area residents. Over the last few years, much retail expansion has taken place in and around Harbison Boulevard, the most prominent of which is Columbiana Station, home to many retail chain outfits such as Target, Goodys, Circuit City, Petsmart, and Old Navy. New retailers have also moved into and around Columbiana Center. Upscale clothing companies Abercrombie & Fitch and Banana Republic, and luxury AV store "Tweeter" have all opened in

the area, as have a number of restaurants such as Macaroni Grill, Yamato's, Carabba's and Texas Roadhouse. Such establishments are attracted to this area due to the higher disposable income of residents and stable employment rates.

Population

The population of the Northwest area is one of the fastest growing in the region. In 1990, the population was 84,204, but by 2000 had grown to 104,071; a 23.6% increase. By 2005, the population is expected to increase to 109,210, an increase of 4.9%. It is projected that the area will grow to 115,541 by 2010, 122,056 by 2015, 128,231 by 2020 and 134,639 by 2025, a growth rate of 29.4% over 25 years.

Housing

In 2000, there were 40,592 occupied households in the Northwest area, up from 31,425 in 1990. 78.8 % of residents lived in family households, of which 56.3% were families with children. 65.2% of Northwest residents own their homes; a 2.4% increase from 1990. Over 35% of residents rent their homes, testament to the high number of apartment complexes to be found in the North West. Single-family housing accounts for 65.3% of housing stock, multi-family housing accounts for 31.8% and mobile homes account for 2.9% of housing. There were approximately 2.4

Northwest Major Employers

Employer	Employees
School District 5	2,070
SC Dept of Corrections	1,100
Roper Personnel	1,000
APAC Teleservices	1,000
Visa-Wachovia	1,000
SC Labor Licensing	800
Honeywell	655
SLED	575
Ellett Brothers	200
Select Comfort	165

Source: SC DOC Industrial Directory

persons per household and 2.9 persons per family. The Northwest area has the following population age characteristics: under 5 years: 7.1%; 5 - 19 years: 26.6%; 20 - 24 years: 8.1%; 25 - 64 years: 52.8% and 65 years and older: 5.4%. The average 2000 household income for the area was \$59,037, up from \$38,978 in 1990. The average family income was \$52,269, up from \$43,674 in 1990.

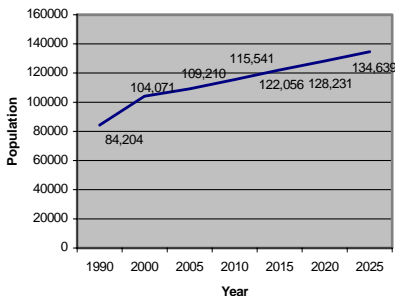
Schools

School District Five of Lexington and Richland Counties encompasses most of the Northwest planning area, with a small portion of Richland District One also falling within this sector. In April 2003, 15,058 students were enrolled in District 5, and a further 2,930 enrolled at the Richland One schools in the northwest area.

District 5 has a reputation for academic excellence. SAT scores average 1064, 44 points higher than the national average and the district has the best PACT scores of any school district

The Metro Core area is made up of the following areas: Downtown Columbia, South Richland, East Richland, North Richland, St. Andrews and Cayce / West Columbia areas; the North East area includes Fort Jackson, Richland North East, Blythewood and Cedar Creek areas; the North West sector is made up of the Dutch Fork/ Irmo, St. Andrews & Chapin areas; the Lexington area comprises the immediate vicinity of the Town of Lexington; the Southwest Lexington area includes South East Lexington and West Lexington County areas; the Lower Richland area includes Horrell Hill, Hopkins and Eastover. The other areas comprise Fairfield and Newberry Counties.

North West Area Population 1990-2025



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Development Climate Continued

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in South Carolina. The Northwest sector has an alternative school, 14 elementary schools, 5 middle schools, and 4 high schools, one of which, Irmo High School, was one of three schools in South Carolina to be designated as Blue Ribbon Schools by the US Department of Education.

Because of the high educational standards and coupled with the tremendous residential growth in the Northwest, 3 new schools have been built over the last 5 years. Dutch Fork Middle opened in 1998, Lake Murray Elementary opened in 1999 and the newest school, Ballentine Elementary opened in 2002.

Within the Northwest area, education levels are high. Over 91% of people have at least a high school diploma, and 39.2% possess at least a bachelor's degree.

Transportation

One of the effects of rapid population growth, particularly in a suburban area like the Northwest, is traffic congestion. As a result of the latest update to the Long Range Transportation Plan (LRTP), several projects were identified with the goal of reducing traffic problems in this area. Listed below are some of the more significant highway (non-Interstate) projects scheduled or proposed for the Northwest area.

Northwest Transportation Projects				
Project	Location	Action	Estimated Cost	Current Activity
Bower Pkwy	Piney Grove Rd to Harbison Blvd	New Road Construction	Figures Not Available	Completed
I-26 @ US 176	I-26 @ US 176	Interchange Improvements	\$20.7 million	Completed
SC 6	SC 60 to SC 6	Road Widening	Figures Not Available	Construction scheduled for 2004
Broad River Rd Widening	Koon Rd @ Broad River Rd	Road Widening	Figures Not Available	Construction scheduled for 2005
Lake Murray Dam	Bush River Rd across Dam	Addition of 2 southbound lanes	Figures Not Available	Construction scheduled for 2005
Columbia Ave, Chapin	I-26 to US 76	Road Widening	\$19.8 million	Proposed
US 76	Hilton	Road Widening	\$17 million	Proposed

Source: CMCOG Transportation Improvement Program

Building Permit Activity

The Northeast area features some of the finest residential communities in the Columbia, SC metropolitan area. The influx of jobs, as well as good

schools and convenient access to Downtown Columbia and the Interstate network has attracted many businesses and residents.

The I-26 and I-20 corridors continue to attract industry to this area. Other factors such as Lake Murray, a

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Distances to Major Markets from the Northwest Sector

Downtown Columbia
11 miles

Charlotte, NC
101 miles

Charleston, SC
121 miles

Atlanta, GA
214 miles

Raleigh, NC
234 miles

Washington, DC
490 miles

Building Permit Activity Continued

(Continued from page 4)

rural atmosphere and country club developments have all contributed to the growth of the North West area.

Communities in the area offer a variety of price ranges. Homes in the older communities closer to Downtown start at modest prices, while those in the more exclusive developments range in price from \$160,000 to over \$1 million around Lake Murray.

Historical: New home construction accounts for the majority of permits issued in the Northwest. Between 1998 and 2002, 4,739 permits were issued for new single family homes in this area, at an average cost over the five years of \$98,349.

Residential: The single family housing market continues to be very strong in the North-

west area. And 2002 was no exception. In 2002, 885 single family permits were issued with a total construction cost of over \$102.4 million. Much of this development is centered around the Dutch Fork and Chapin areas. The Dutch Fork area accounted for almost half the single family building permits issued in 2002.

Multi-Family Housing has also increased with an additional 430 units permitted between 1998 and 2002. 266 units were permitted in 2002. Multi-Family housing accounts for almost a third of occupied residences in the Northwest sector with over 11,200 apartment units located in this area of the region.

Non-Residential: The total value of non-residential permits issued in 2002 was almost \$37.5 million, with business permits accounting for the majority of

non-residential permits (\$32.6 million). In 2002, the largest permit issued was valued at \$5.2 million to construct the new Palmetto Health Medical Center on Lake Murray Boulevard at I-26. Other notable permits issued in 2002 were for \$4.3 million for the new SC Medical Association Building on Westpark Boulevard, for \$2.9 million for a new 76,000 square foot office building at 200 Center Point Drive, and for 2 new Publix grocery stores located at 2732 North Lake Drive and Broad River Road at Kennerly Road respectively.

Overview by Sector

Breaking the Northwest area down further into submarkets reveals the following:

The majority of the growth is taking place in the Irmo submarket. 65% of building permits issued in the North West were issued in this zone in 2002. The Chapin area was responsible for 17.3% of all permits, followed by Dutch Fork (10%) and St. Andrews (7.7%).

The Irmo submarket is also where the majority of single-family permits are issued (71.4%) at an average cost per permit of \$112,014. The highest average cost for a single-family housing permit was found in the Dutch Fork area with \$155,443.

Permits for businesses were fairly evenly distributed throughout the Northwest region in 2002. Irmo accounted for 42% of business permits, followed by Dutch Fork (32%), St. Andrews (23%) and Chapin (3%). St. Andrews had the highest average cost per business permit with \$458,908.

Data Collection

All building permits issued for the construction of new residential units or the construction of nonresidential structures are included. In addition, building permits issued for additions, alterations or repairs on nonresidential structures are included if the value of the work was listed for \$25,000 or greater. Also included are the additions and repairs to residential structures costing over \$10,000. Central Midlands COG has elected to study the cost of repairs more closely to attempt to determine where regeneration of older housing stock is taking place.

Permits issued for the construction of garages, carports, swimming pools, storage sheds, etc. on residential property are not included in this study.

Northwest Building Permits				
Permit Type	2001		2002	
	Number	Average Cost	Number	Average Cost
Additions	193	\$10,052,839	185	\$8,630,437
Assembly	7	\$2,178,444	2	\$105,456
Business	113	\$21,990,935	96	\$32,664,931
Educational	1	\$30,000	1	\$85,700
Mercantile	15	\$6,094,470	4	\$3,133,261
Single Family	863	\$90,391,812	885	\$102,388,31
Repair	NA	NA	67	\$4,361,438
Multi Family	1	\$59,450	266	\$8,460,613
Storage	20	\$1,038,664	25	\$1,496,006

Source: CMCOC Building Permit Survey

Multi-family Housing Development

The Northwest area has the highest concentration of apartment units in the Columbia area. According to the 2000 Census, apartments accounted for almost one third of living accommodations in the northwest. In 2002, there were 11,221 multi-family housing units in the Northeast. This accounts for 40.1% of all apartments in the Columbia Metro Area. Of these units, 885 (7.9%) were vacant in 2002. This vacancy rate is only slightly higher than that of the entire Columbia Metropolitan Statistical Area (MSA), which has an overall vacancy rate of 7.5%.

This sector experienced a boom in the multi-family housing market in the property boom of the late 1980s, when the majority of units were constructed. There has been little new multi-family housing construction in this area recently, (204 units were built between 1997 and 2002), however development has increased over the last couple of years with an additional 438 units under construction around Harbison Boulevard.

The majority of units in the Northwest area (49.1%) are two bedroom units. Rental rates are slightly above average for the Columbia area, with rent for a 2 bedroom unit averaging \$629/month. 38.6% of units have one bedroom (average rent = \$542/month), and 12.3% have three or more bedrooms (average rent = \$745)

Northwest Multi-family Housing Developments			
Development	Development Stage	# of Units	Location
The Crestmont	Under Construction	200 Units	34 Woodcross Dr Columbia
Walden Heights At Harbison	Under Construction	238 Units	100 Walden Heights Dr, Irmo

Source: CMCOG Multi-Family Survey

Retail and Office Space Trends

Due to the fact that commercial development tends to follow residential growth patterns, the Northwest area, like the Northeast Richland County area, has developed into the second largest markets for office and retail space. In 2002, 2,736,713 square feet of office space in 81 buildings was surveyed. The majority of office space in the northwest sector (85%) is in the St. Andrews area and is 86.4% occupied. Rental rates are the 2nd highest in the Columbia area with an average of \$14.35 per square foot. The Irmo/Dutch Fork area accounts for considerably less office space (405,785 square feet) due primarily to the area being oriented more towards retail and commercial developments. Despite being relatively small in size, ranking 7th out of 10 for total square footage, rental rates are the 4th most expensive in the Columbia area, averaging \$13.49 per square foot. In 2002, 16.9% of office space in Dutch Fork/Irmo was vacant.

The Northwest area continues to be the largest retail market in the Columbia Metro area, containing 50 of the 182 retail structures surveyed in the region. This accounts for a total of 5,298,877 square feet of retail space. A little over a quarter of this space is taken up by 2 regional malls - Dutch Square Mall (600,000 sq. ft) and Columbiana Centre (787,158 sq. ft). The retail market share of the Northwest area is expected to grow with the addition of an further 208,000 square feet of space which is currently either under construction or planned for development. These future developments include the Publix at Kennerly Road (80,000 sq. ft), Murray Landing Shopping Centre (69,000 sq. ft), and Ballentine Center (60,000 sq. ft). The Northeast has the 4th lowest retail vacancy rate in the Columbia area with 8.5%. Rental rates vary from \$20.34 per square foot in Dutch Fork/Irmo (2nd highest in the metro area) to \$8.39 per square foot in St. Andrews (3rd lowest).

	Northwest Office & Retail Space	
	Office	Retail
Square Ft	2,736,713	5,298,877
Vacancy Rate	17.3%	8.5%
Market Share	21.5%	35.3%
Rental Rate	\$13.92	\$14.37

Selected Statistics for The Northwest Area

2000 Census Data

AGE			
	Total	Male	Female
Total Persons	104,071	51,660	52,411
Under 5 Yrs	6,703	3,422	3,281
5-17 Yrs	19,417	10,291	9,126
18-24 Yrs	10,265	5,146	5,119
25-39 Yrs	26,814	13,400	13,414
40-64 Yrs	32,564	15,912	16,652
65-84 Yrs	7,360	3,233	4,127
85 Yrs & older	948	256	692

RACE						
	White		Black		Other	
Age	Male	Female	Male	Female	Male	Female
Under 5	2,065	1,994	1,135	1,119	222	168
5-17 Yrs	6,609	5,947	3,295	2,792	387	387
18-24 Yrs	3,100	3,094	1,801	1,802	245	223
25-39 Yrs	8,477	8,460	4,397	4,433	526	521
40-64 Yrs	12,514	13,127	2,987	3,093	411	432
65-84 Yrs	2,930	3,711	260	351	43	65
85 +	230	626	24	54	2	12

2000 Income	
Income	H-holds
Below \$10,000	2,370
\$10,000-\$14,999	1,355
\$15,000-\$19,999	1,991
\$20,000-\$24,999	2,675
\$25,000-\$29,999	2,410
\$30,000-\$34,999	2,618
\$35,000-\$39,999	2,223
\$40,000-\$44,999	2,301
\$45,000-\$49,999	2,529
\$50,000-\$59,999	3,999
\$60,000-\$74,999	5,195
\$75,000-\$99,999	5,664
\$100,000-\$124,999	2,572
\$125,000-\$149,999	1,117
\$150,000-\$199,999	833
Over \$200,000	793
Average HH Income	\$52,269

Housing Values	
Value	# of Houses
Less than \$19,999	163
\$20,000-\$49,999	868
\$50,000-\$79,999	4,174
\$80,000-\$99,999	5,722
\$100,000-\$149,999	7,718
\$150,000-\$199,999	3,841
\$200,000-\$299,999	2,348
\$300,000-\$399,999	935
\$400,000-\$499,999	382
\$500,000-\$749,999	269
\$750,000-\$999,999	54
\$1,000,000 +	99

Educational Attainment	
Level	# of Persons
Less than 9th Grade	1,220
9th-12th Grade	4,674
High School Graduate	13,836
Some College	14,925
Associate Degree	6,267
Bachelor 's Degree	17,956
Graduate Degree	8,521

Occupancy	
	Total
Total Housing Units	43,673
Vacant	3,081
Occupied	40,592
Owner-Occupied	26,480
Renter-Occupied	14,112

Poverty	
Below Poverty Level	6,865
Above Poverty Level	91,842

Newsletter Format

The newsletter will focus on each of the areas of the Midlands in turn.

Each newsletter will highlight the latest developments in each area to give a brief overview of each sector of the Central Midlands region. More detailed information can be found on our website.

Highlighted in each issue will be other "hotspots" in the region. These will include major developments and trends occurring in other parts of the Midlands.

Source: 2000 Census of Population and Housing



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Central Midlands Newsletter

EXTRA, EXTRA!!!

One of the most visible and projects taking place in the Northwest sector over the last couple of years is the construction of the back up dam at Lake Murray. Construction of the new dam was ordered by the Federal Energy Regulatory Commission as a back up for the original dam, which, it was feared, would not withstand the effects of a large earthquake, leaving cities such as Columbia, Cayce and West Columbia partially flooded if the original 73 year old dam were to be breached. The impact of construction has been considerable. More than 40,000 people live around the lake and have seen water levels lowered around their properties and more than 250,000 visitors use the lake each year for recreational purposes.

Work started on the new dam in the fall of 2002 as water levels were lowered to around 340 feet (usual water level is between 350 and 360 feet) to allow for safe construction conditions. The new structure will extend about 1.5 miles and consists mostly of rock, with a roller-compacted concrete dam in the midsection. The new structure will also allow a much needed traffic problem to be addressed, as space will be created to permit the construction of 2 additional lanes on SC 6 across the dam. Currently, this section of SC 6 carries 18,500 vehicles per day. The two new lanes will be between the existing dam and the new backup dam. On completion: 444 million gallons of water will have been pumped from Lake Murray; 2.8 million tons of soil and 5.8 million tones of rock will have been excavated and 43,000 yards of concrete will have been poured. The \$275 million project is expected to be completed by the end of 2004.

For further information on Central Midlands Council of Governments, please visit our webpage:
www.centralmidlands.org

Central Midlands Council of Government - Our Data, Your Resource!!