



REGION REPORT

“Local Solutions to Regional Problems”

Spring 2006

Volume 3, Issue 1

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Welcome to the Spring 2006 edition of the
CMCOG Region Report

This issue of **Region Report** focuses on the West Metro area of Lexington County. The West Metro area is located in eastern Lexington County on the banks of the Congaree River and comprises the municipalities of Cayce, West Columbia and Springdale and their surrounding areas. Over the last few decades, population growth in this area could be considered moderate at best (the area’s population increased by just 4,000 persons between 1970 and 2000). However, recent developments made possible by the opening of desirable riverfront properties, coupled with the area’s rich historical heritage, affordable housing and its proximity to Downtown Columbia seek to buck that trend.

The Cayce/West Columbia area was one of the first inland European settlements in South Carolina and eventually gave rise to a number of townships such as Old Saxe Gotha, Granby and New Brookland. The area was also the site of a number of skirmishes during the Revolutionary War, as well as being the site from where Sherman’s Union troops shelled Columbia during the Civil War.

Today, the Cayce/West Columbia/Springdale area is a key center for commerce within the Midlands and is served by interstates 26 and 77 as well by the Columbia Metropolitan Airport, which in 2005 served a record 210,000 passengers. The airport is also served by a United Parcel Service (UPS) hub, which employs over 1,500 persons. The airport is also adjacent to one of South Carolina’s three Foreign Trade Zones (FTZs).

Residential development has increased significantly in the West Metro sector over the last few years with homes available ranging from affordable starter homes in established neighborhoods such as “The Avenues” all the way to million dollar properties along the river at “Congaree Park.” A number of new condominium developments are also being discussed in this area. The Cayce/West Columbia area is also seeing an influx of Hispanic residents. The number of Latin American markets, restaurants and other services has increased considerably in recent years to serve this growing segment of the West Metro area’s population.

In Focus:



West Metro Area

Market Area:

The West Metro Area had a population of 42,655 in 2000, an increase of just 897 persons since the 1990 Census. The majority of the population resides in the eastern portion of the area, around the cities of Cayce and West Columbia. The western part of this sector to the west of I-26 has traditionally been less densely populated and more commercial in nature; both the airport and Midlands Technical College are located here. More residential development is anticipated in the western part of the area in the coming years as the City of Cayce continues to annex property to the west of the airport. To the east, West Columbia has also sought to broaden its tax base through annexation; a policy which will ensure continued development in the area.

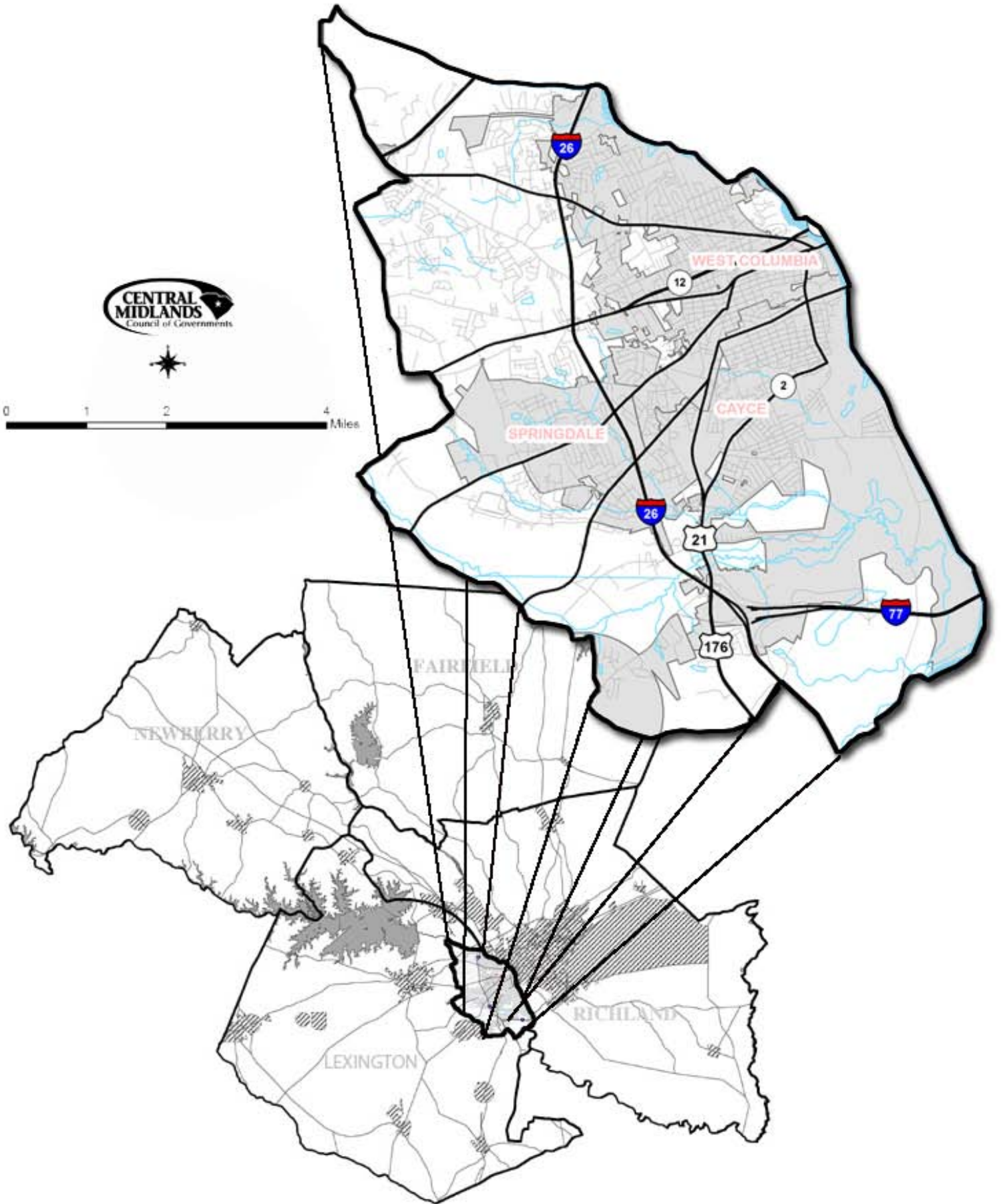
The Economy:

In 1990, the labor force of the West Metro area totaled 23,037. By 2000, the labor force in the County had fallen slightly to 22,407; a

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www.centralmidlands.org

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West Metro Development Climate

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decrease of 630, which can be attributed to the aging population of the area between 1990 and 2000. Labor force estimates for 2005 show 23,405 persons; an increase of 1,008 persons from 2000.

Employment for residents of the West Metro Area is divided as follows: Services - 41.1%; Wholesale/Retail Trade - 16.2%; Finance, Insurance, & Real Estate - 8.9%; Manufacturing - 8.9%; Construction - 8.5%; Government - 7.2%; Transportation - 8.6% and Agriculture/Mining - 0.6%.

The West Metro area displays typical characteristics of a mid-sized urban area. The vast majority of residents are employed in service industry positions, such as health care, professional services etc and white collar positions account for over 2/3rds of all employment.

In 2000, the West Metro Area had an unemployment rate of 4.1%, although this figure was still higher than the 2000 Lexington County rate of 3.7%. Currently, unemployment in Lexington County is closer to 5%. The West Metro area also has a higher than average number of persons aged 16+ not in the labor force (32.3%). This can be explained by the high average age in the area, which is the second highest average age (40.5 years) of all the planning sectors in the Greater Columbia area.

Time Warner Cable has moved some of its business operations to the NCR facility on Platt Springs Road from its Greystone Boulevard offices.

Population

The population of the West Metro area has remained constant over the last 25 years.

Between 1970 and 2000, the population grew modestly from 38,484 to 42,655, a 10.8% increase. By 2005, the population was estimated to be 43,900, an increase of 2.9% from 2000. It is projected that the population of the West Metro area will continue to increase steadily, reaching 44,286 by 2010; 44,922 by 2015; 46,052 by 2025 and 47,085 by 2035, an increase of 4,430 persons over the 35-year period.

Housing

In 2000, there were a total of 20,077 housing units in the West Metro area, an increase of 1,934 (10.7%) from the 18,143 reported in 1990. The West Metro area has a lower percentage of vacant units (7.9%) than the Lexington County average (8.5%). Indicative of the older population in the area is the high percentage of one person households (29.3%) and Few households (5.0%) have more than 4 persons. 41.8% of households in this area were families with children. 15.3% of households were single parent families. 69.2% of West Metro area residents own their homes. The remaining 30.8% are renters. The majority of the housing stock (66.7%) is single family housing. The multi-family housing market in the West Metro area is strong with apartments accounting for 22.2% of the housing stock. Mobile homes account for 11.1% of housing units.

West Metro Area Major Employers

Employer	No. of Employees
Lexington Medical Center	1,500
United Parcel Service	1,388
Lexington School Dist. 2	1,173
NCR Corp	1,000
US Post Office	800
Eagle Aviation	449
Columbia Farms	425
SMI Steel	400
Wal-Mart	350
Solectron	350

Source: Dunn & Bradstreet Employment Database, 2005

Demographics

The West Metro area's population displays the following characteristics: White - 78.9%; African-American - 17.1%; Other - 4.4%. The West Metro area also has the following population age characteristics: under 5 years: 5.6%; 5 - 14 years: 10.9%; 15 - 29 years: 21.9%; 30 - 59 years: 40.1%; 60 - 84 years: 18.7% and 85 years and older: 2.8%. With a median age of 38.3 years, the West Metro area has the second oldest population of any county in the region. More than 22% of the county's population were estimated to be aged 60+ in 2005.

The West Metro area had a median household income of \$37,709 In 2000, up 28% from \$29,467 in 1990, in both instances around \$4,200 less than the average for the Greater Columbia area. 2005 estimates project a median household income of \$41,028. Per Capita Income for the West Metro area was \$22,158 in 2005.

CMCOG Market Areas

The Metro Core area is made up of the following areas: Downtown Columbia, South Richland, East Richland, North Richland, St. Andrews and West Metro (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.

Education

The West Metro area is served by Lexington School District Two. 7,159 students are enrolled at the 12 public schools located within this sector. The District also has an Adult Education Center and an Early Childhood Development Center. The West Metro sector is home to 7 private schools, Glenforest School, Colum-

bia Adventist Academy, Grace Christian School, Colonial Christian Academy, Covenant Christian Academy, Holy Trinity Lutheran School and the Wil Lou Gray Opportunity School. Midlands Technical College has a campus near the airport at which 4,200 students are enrolled.

Education levels in the West Metro area are as follows: 50.3% of residents aged over 25 have at least some college education. 23.2% possess at least a bachelor's degree; 7.1% have a masters degree or possess doctorates. 18.3% of West Metro area residents have not completed a formal high school education.

Distances to Major Markets from The West Metro Area

Downtown Columbia
2 miles

Charlotte, NC
81 miles

Charleston, SC
106 miles

Atlanta, GA
191 miles

Raleigh, NC
227 miles

Washington, DC
485 miles

West Metro Area Public Schools			
School	No. of Students	School	No. of Students
BC Grammar #1	354	Taylor Elementary	457
Davis Elementary	484	Busbee Middle	479
Pair Elementary	381	Fulmer Middle	712
Pineview Elementary	523	Northside Middle	539
Saluda River Elementary	318	Airport High	1,305
Springdale Elementary	432	Brookland-Cayce High	1,175

Transportation

The West Metro area enjoys a favorable location in the heart of the Midlands and is connected to the port of Charleston by I-26 and to Charlotte, NC and points north by I-77. The area is well served by other major highways such as US 1, US 378, SC 302 and SC 602 as well as by rail lines operated by CSX and Norfolk & Southern Railroads. The Columbia Metropolitan Airport is also located in the West Metro area 3 miles from I-26. The most recent significant

highway projects in the West Metro sector include the Airport Connector from SC 302 to Platt Springs Rd. The first phase of this project was completed in mid-2005. The second phase, estimated to cost around \$10 million, proposes to extend the Airport Connector from Platt Springs Rd to US 1 allowing better access to the airport from the west. Work was also recently completed on the widening of Platt Springs Rd from Charleston Highway to Emmanuel Church Road. This

project widened 5.5 miles of existing highway from three to five lanes.

Improvements are also scheduled to be made along I-26 in the West Metro Area. Improvements were completed in the fall of 2005 to the I-26 interchange with US 378 and are proposed to be made at the US 1 and SC 302 (airport) interchanges in the coming years. The municipalities of West Columbia and Cayce are also actively seeking ways to improve their highways through beautification projects.

Building Permit Activity

Building permit activity in the West Metro area reflects the area's urban, largely built-out nature. Lacking huge tracts for residential development as might be found in Irmo or Richland Northeast and repairs/additions are often made to existing structures in lieu of new construction. In 2005, 463 building permits were is-

sued, up from 404 in 2004. In 2005, 56% of permits were issued in the Springdale area, with 44% issued in the Cayce/West Columbia area. Single family home permits accounted for the majority (43%) of permits issued in 2005. Property values in the West Metro area vary greatly,

however, the average price of a 1600 square foot single family home was around \$125,000 in 2005. In general, house prices in the West Metro area tend to be slightly lower than elsewhere in the Greater Columbia area, due to the area, and in particular, the Cayce/

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Building Permit Activity *(Continued)*

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West Columbia portion of the study area, generally having an older housing stock. 40% of homes in Cayce/West Columbia were constructed prior to 1960, while more than 45% of homes in the Springdale area have been constructed since 1980. The presence of an older housing stock, however, coupled with lower taxes and its proximity to Downtown Columbia, is what now makes the West Metro area so desirable for young families.

Historical: Since 2000, a total of 2,321 building permits valued at over \$521.5 million have been issued in the West Metro sector. Business permits accounted for 37.3% of the total value of permits issued since 2000, followed by additions (26.2%). Single Family housing permits accounted for 18.3% of the total value of all permits between 2000 and 2005.

Residential: Single family housing permits accounted for the highest number of

building permits issued in the West Metro area between 2000 and 2005. 746 new homes have been permitted for construction since 2000 at an average of 124 new single-family homes each year at an average cost of \$128,321. 2005 marked the year with the most single family permits issued (202), proof of the recent upswing in residential development in the West Metro area. 2004 and 2005 accounted for over 40% of single family housing permits issued since 2000. The most expensive housing permit issued in this sector in 2005 was for \$550,000 for a new home along the Congaree River in West Columbia.

Multi-family housing units account for 28.4% of the West Metro area's housing stock. Between 2000 and 2005, 263 multi-family housing permits totaling \$14.1 million were issued in the West Metro sector. 94% of multi-family housing permits were issued in 2001. No multi-family housing permits were issued in the West

Metro area in 2005.

Non-Residential:

The total value of non-residential permits issued for new construction since 2000 was \$238.1 million, with permits for businesses accounting for the overwhelming majority (81.7%) of non-residential permits (\$194.5 million). The remaining non-residential permits were for factories (\$14.2 mill.), institutions (\$7.5 mill.), educational (\$7.3 mill.), storage facilities (\$6.5 mill.), mercantile (\$4.5 mill.) and churches (\$3.6 mill.)

In 2005, the highest value non-residential permit issued in the West Metro area was for \$17 million for the upfit of part of the NCR facility at 3325 Platt Springs Rd for use as a call center by Time Warner Cable. Other notable permits issued in 2005 include \$3.8 million for plumbing and HVAC upgrades at Lexington Medical Center, \$1.3 million to construct a child development center on Hulon Lane and \$1.1 million to construct a gymnasium for the private Glenforest School on Harbor Drive in West Columbia.

Conclusion

In conclusion, development in the West Metro area is strong, with more new homes being constructed in the last few years than has been witnessed in many years. Commercial development is also healthy, with \$113 million in new business permits issued in the last two years. New residential development will continue to be focused in the Springdale portion of the area, as more developable land is available. The trend of a renovating older properties such as in the mill villages will continue unabashed in the coming years, as house prices rise and more people discover affordable properties in the West Metro area.

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.

West Metro Area Building Permits				
Permit Type	2004		2005	
	Number	Average Cost	Number	Average
Additions	126	\$163,419	98	\$119,346
Business	51	\$1,658,691	34	\$804,297
Education	1	\$6,672,261	0	\$0
Institutional	1	\$7,498,349	0	\$0
Mercantile	1	\$560,236	0	\$0
Multi-Family	1	\$327,120	0	\$0
Single Family	104	\$135,789	202	\$164,115
Repair	89	\$47,829	102	\$79,202
Storage	18	\$68,134	8	\$27,767

Source: CMCOG Building Permit Studies, 2004 & 2005

Multi-family Housing Development

Multi-Family accounted for 28.4% of the housing market of the West Metro area and the West Metro area accounts for 8.7% of all apartment housing surveyed in the Greater Columbia area in 2004. In 2004, there were 3,386 multi-family housing units (apartments, subsidized units & condominiums) in the West Metro area. Of these units, 2,550 (73.8%) were non-subsidized units (Type A units), 470 (13.9%) were subsidized/Section 8 units (Type B units) and 416 (12.3%) were condominiums. The Type A units in the West Metro area are comprised of 22.7% 1 bedroom units, 57.2% 2 bedroom units and 20.1% 3 or more bedroom units. In 2004, 307 or 12.0% of all Type A apartments in the West Metro area were vacant; slightly higher than the 2004 vacancy rate for the Greater Columbia area of 8.6%.

No new apartment complexes have been constructed in the West Metro area since 2001. No new Multi-Family units are currently planned for development. The most recent developments were the 144 Pointe West Apartments and the 104 unit Congaree Villas in Cayce in 2001.

Subsidized housing accounts for a sizeable portion of the West Metro area multi-family housing market. The largest subsidized complex is Gentle Pines (150 units) in West Columbia.

Largest Multi-Family Housing Complexes In the West Metro Area	
Name of Complex	No. of Units
Riverbend Apartments	400
Park Place	300
Lexington Place	227
Quail Hollow	215
University Commons	206

Source: CMCOG Multi-Family Survey, 2004

Commercial Development Trends

Commercial development tends to reflect residential growth patterns, and as a result, commercial activity in the West Metro area is centered around primary arterial roads within easy access of interstates and subdivisions. In 2005, the West Metro area had 642,705 sq.ft of leasable office space in 42 buildings, ranking 5th out of the 10 sectors in Greater Columbia. In 2005, 20.9% of office space was vacant, ranking the West Metro area the 4th highest in the region for vacant office space. The office space market in the West Metro area has grown steadily over the last few years, adding 43,046 square feet of space since 1998. One new 12,000 sq.ft development is under construction at 110 Sunset Boulevard and one smaller structure of 4,200 sq.ft is planned at 746 Sunset Boulevard. At \$10.02 per sq.ft, rental rates in the West Metro area are the third lowest in the region.

The West Metro area has a strong retail market having 9% of the retail market space within the Greater Columbia area. With a vacancy rate of 14.3%, the West Metro area ranks 5th of the 10 sectors in the Greater Columbia area. This rate represents an improvement since 2001 when the vacancy rate was 22.6%. Average rental rates for retail space average \$9.53 per square foot, ranking 6th of the 10 Greater Columbia market sectors.

Industry and commerce are critical to the economy of the West Metro area. More than 1.2 million sq.ft of warehouse space can be found in this sector, of which 421,000 sq.ft is available for lease or sale. The largest vacant warehouse space is the former JB White's distribution center on US 378, which at 240,000 sq.ft accounts for 20% of the area's warehouse space and over half the available square footage. 45 commercial land sites totaling more than 1,800 acres are also available in the West Metro area.

West Metro Commercial Space		
	Office Space	Retail Space
Square Footage	642,705	1,377,533
Vacancy Rate	20.9%	14.3%
Market Share	5.0%	9.0%
Av. Rental Rate/sq.ft	\$10.02	\$9.53

Source: 2005 CMCOG Commercial Real Estate Survey

Selected Statistics for the West Metro Area

2000 Census Data

AGE			
	Total	Male	Female
Total Persons	42,655	19,876	22,779
Under 5 Yrs	2,402	1,236	1,166
5-14 Yrs	4,659	2,361	2,298
15-29 Yrs	9,342	4,528	4,814
30-59 Yrs	17,070	8,290	8,780
60-84 Yrs	7,980	3,188	4,792
85 Yrs & older	1,202	273	929

City of Cayce (2000 Population)	12,150
Town of Springdale (2000 Population)	2,877
City of West Columbia (2000 Population)	13,064
Population of Remainder of Area	14,564

RACE			
	White	Black	Other
Cayce/W.Columbia Sector	33,659	7,275	1,721
City of Cayce	9,058	2,734	358
Town of Springdale	2,558	223	96
City of W. Columbia	9,738	2,588	738

Occupancy	
	Total
Total Housing Units	20,077
Vacant	1,572
Occupied	18,505
Owner-Occupied	11,643
Renter-Occupied	6,862

2000 Income	
Income	H-holds
Below \$10,000	2,009
\$10,000-\$24,999	4,278
\$25,000-\$49,999	6,020
\$50,000-\$99,999	5,108
\$100,000-\$149,999	884
\$150,000-\$199,999	121
Over \$200,000	111
Average HH Income	\$45,148

Housing Values (Owner-Occupied Units)	
Value	# of Houses
Less than \$19,999	584
\$20,000-\$49,999	1,240
\$50,000-\$79,999	3,463
\$80,000-\$99,999	2,573
\$100,000-\$149,999	2,513
\$150,000-\$199,999	661
\$200,000-\$299,999	496
\$300,000-\$399,999	90
\$400,000-\$499,999	12
\$500,000-\$749,999	5
\$750,000-\$999,999	6
\$1,000,000 +	6
Average Value	\$86,469

Educational Attainment (Ages 25+)	
Level	# of Persons
Less than 9th Grade	1,637 (5.5%)
9th-12th Grade	3,792 (12.8%)
High School Graduate	9,285 (31.4%)
Some College	8,043 (27.1%)
Bachelor's Degree	4,759 (16.1%)
Graduate Degree	2,111 (7.1%)

Poverty Levels	
Persons Below Poverty Level	5,835 (14.0%)
Persons Above Poverty Level	35,798 (86.0%)

Source: 2000 Census of Population and Housing

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.



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Central Midlands Region Report

EXTRA, EXTRA!!!

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The Congaree River is one of the three rivers along which the Greater Columbia area is located and one of the region's most outstanding natural resources. From the establishment of the first European settlement along the riverbanks at Granby, near present day Cayce, to the area's present day redevelopment and transformation into an area of outstanding natural beauty with prime real estate overlooking the skyline of the City of Columbia, the Congaree River has played a critically important role in shaping the development and character of the West Metro Area.



View from West Columbia towards Downtown Columbia

The area on the western shores of the Congaree was only incorporated as recently as 1894 in the case of West Columbia, formerly Brookland) and in 1914 (Cayce). The Brookland mill village was built as a source of housing for employees of the world's first electrically driven textile mill and necessitated the building of the Gervais Street bridge to allow workers easy access to the mill - previously, ferries had been used to transport workers across the river. During the twentieth century, West Columbia and Cayce developed into separate communities, now linked to the Capital City by several bridges spanning the Congaree river. With the development of the Columbia's Vista on the other side of the Gervais Street bridge, the West Metro's own "Vista West" developed around the old commercial area along State Street. 2002, saw the completion of the West Columbia and Cayce sections of the 3 Rivers Greenway; more than 40 acres including walking



New Home in Congaree Park

trails on the banks of the Congaree. New residential developments along the river include plans for more than 50 upscale homes selling for up to \$500,000. In 2006, the 3 Rivers Music Festival will feature some events on the western shores of the Congaree for the first time. The Congaree River has long been a part of life in the Midlands and recent developments are working to ensure that it remains at the heart of the community for many more years.