

Central Martinez Area Study

Section 1: Inventory and Analysis

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Map showing Columbia County in a regional context

1.1 OVERVIEW

Purpose

The purpose of the Central Martinez Area Study is to undertake a comprehensive and inclusive examination of the Central Martinez area as it currently exists and to then develop a plan that ensures its continued growth as a vibrant, mixed-use core community core. Recent changes in the Study Area have highlighted the need to establish a new vision for this important business center of Columbia County. By recognizing existing challenges and building upon opportunities, the Study is intended to serve as a guide for positive change that both benefits the immediate area and the citizenry of Columbia County.

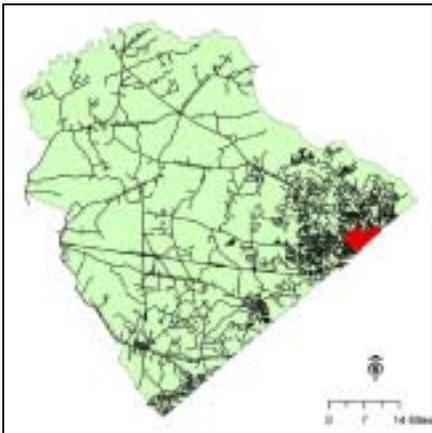
This section provides a summary of existing conditions within the Study Area. Study Area components are divided into functional categories for the purpose of organization. Within each category an Overview is provided with background information and theories, Existing Conditions are described, and Strengths, Weaknesses, Opportunities and Threats are summarized.

Location and Context

Martinez is an unincorporated area of Columbia County, Georgia, with its center being the area around the intersections of Washington and Old Evans Roads. It lies between Augusta and Evans and affords exceptional access to the Augusta region and the rest of the southeastern United States via Interstate 20 and a system of state and local roads.

The Central Martinez Study Area generally includes the commercially zoned properties fronting Washington Road between the county line and the Kroger shopping center. It also includes the area south of this to the Richmond County border and north to the back of the single-family residential neighborhoods. Please see Study Area map on the following page.

The Study Area is surrounded by primarily single-family residential neighborhoods dating from the 1970s and early 1980s. These neighborhoods reflect the first wave of suburban expansion from Augusta into Columbia County. In fact, this residential expansion created the demand for many of the large-scale commercial centers that currently exist in Central Martinez.



Map showing Study Area with Columbia County



A residential street in Central Martinez

Study Area



1.2 STREET PATTERNS

Overview



The arrangement of streets defines towns and cities the world over

Streets and blocks are the most important defining characteristics of a community. While buildings and land uses often change, the platting pattern of a community usually remains unchanging over the centuries. Blocks and streets can be thought of as the “bones” of a community. As bones determine our height, stature and looks, the arrangement of different block and street patterns directly affect the types of communities that they can support and the importance of key building sites.

There are two principal types of blocks and street patterns:

Dendritic, or tree-like, street systems are made up of many small and disconnected local streets that feed into fewer collector streets that, in turn, feed into even fewer arterials. Because this pattern contains many dead-end local streets it forces all traffic onto collectors and arterials and results in large block sizes and increased trip distances.



A dendritic street system

The *dendritic* pattern tends to discourage walking, encourage traffic congestion on collectors and arterials, and create a transportation system that is prone to shutdown when accidents or other incidents disrupt traffic collectors or arterials. Its creation of longer trips also supports conventional suburban-style land uses marked by their automobile orientation, separation of use, and disregard for the quality of the streetscape. These great distances also have a direct impact on the ability of emergency vehicles to respond to situations in an efficient manner.

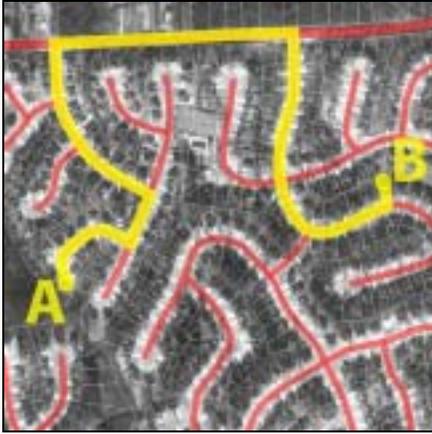
Interconnected street systems are made up of a series of small and medium sized streets arranged in a grid or modified grid pattern. In this pattern, virtually all streets connect to other streets. This provides small blocks, ensures many possible routes of travel and eliminates the need for wide and high traffic arterials and collectors.



An interconnected street system

The interconnected street pattern encourages walking, bicycling and other forms of non-motorized transportation because it increases the likelihood of being able to make a trip without being forced onto a high-speed, high-volume arterial or collector. It also tends to support pedestrian-oriented land uses by allowing land uses to be closer together, thus increasing the opportunities for shared parking and pedestrian-oriented streetscapes.

“Smart growth” principles generally support an interconnected system over a *dendritic* one because it balances pedestrian and vehicular needs better. Both cars and pedestrians operate more



In a dendritic system, the distance from A to B is one mile and achievable along one route

efficiently when many routes of travel, shorter distances, and more direct trips are available. Generally, this means block sizes of not more than 800 feet in length, but preferably between 200 and 600 feet. In developed areas with an existing *dendritic* system achieving this can be a challenge because interconnected systems work best over a large area. In most places the reality is that arterials and collectors serve transportation needs that extend beyond the immediate area. Even so, a localized interconnected system can reduce congestion on these streets by dispersing local trips.

The arrangement of streets can also be used to define key public spaces and building sites. In traditional community design, important buildings were often located at the end of a street vista (see image on preceding page). Similarly, parks and open spaces were always defined by streets to ensure maximum public access.

Existing Conditions



In an interconnected system the distance from A to B is one half mile, with multiple route options

Central Martinez contains a block and street system that is a combination of a *dendritic* and an interconnected one. Within the Study Area, major interconnected arterials exist, but the blocks they create are often several miles in length. Smaller local streets to the southwest of the Study Area create smaller blocks, reflective of their residential character. The street layout in the core suggests that the street system was more extensive once, but likely succumbed to redevelopment.

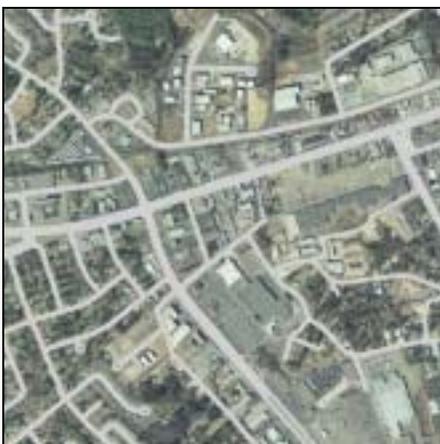
Strengths, weaknesses, opportunities and threats associated with Central Martinez's Street Pattern can be summarized as follows:

Strengths

- Interconnected streets, which exist in the area bounded by Washington Street, Davis Road, and Bobby Jones Expressway.
- Blocks as small as 300 feet in length, which exist in residential sector to the west.

Weaknesses

- Few local north-south streets.
- Over-reliance on Bobby Jones Expressway and Davis Road for local north-south movements.
- Few local east-west streets.
- Over-reliance on Washington Road for local east-west movements.



The street system of Central Martinez



Street patterns suggest that a street once ran in front of K-mart

- Rail line north of Washington Road, which limits opportunities for new streets.

Opportunities

- Alternation of the Study Area's street patterns through the creation of new streets (see next page for potential locations).
- Conversion of existing private streets into more traditional streets through the addition of sidewalks, striping, and curbs.
- Reduction in traffic on key streets by providing alternative routes.
- Terminus points.
- Large sites, which provide opportunities for new streets when redeveloped.

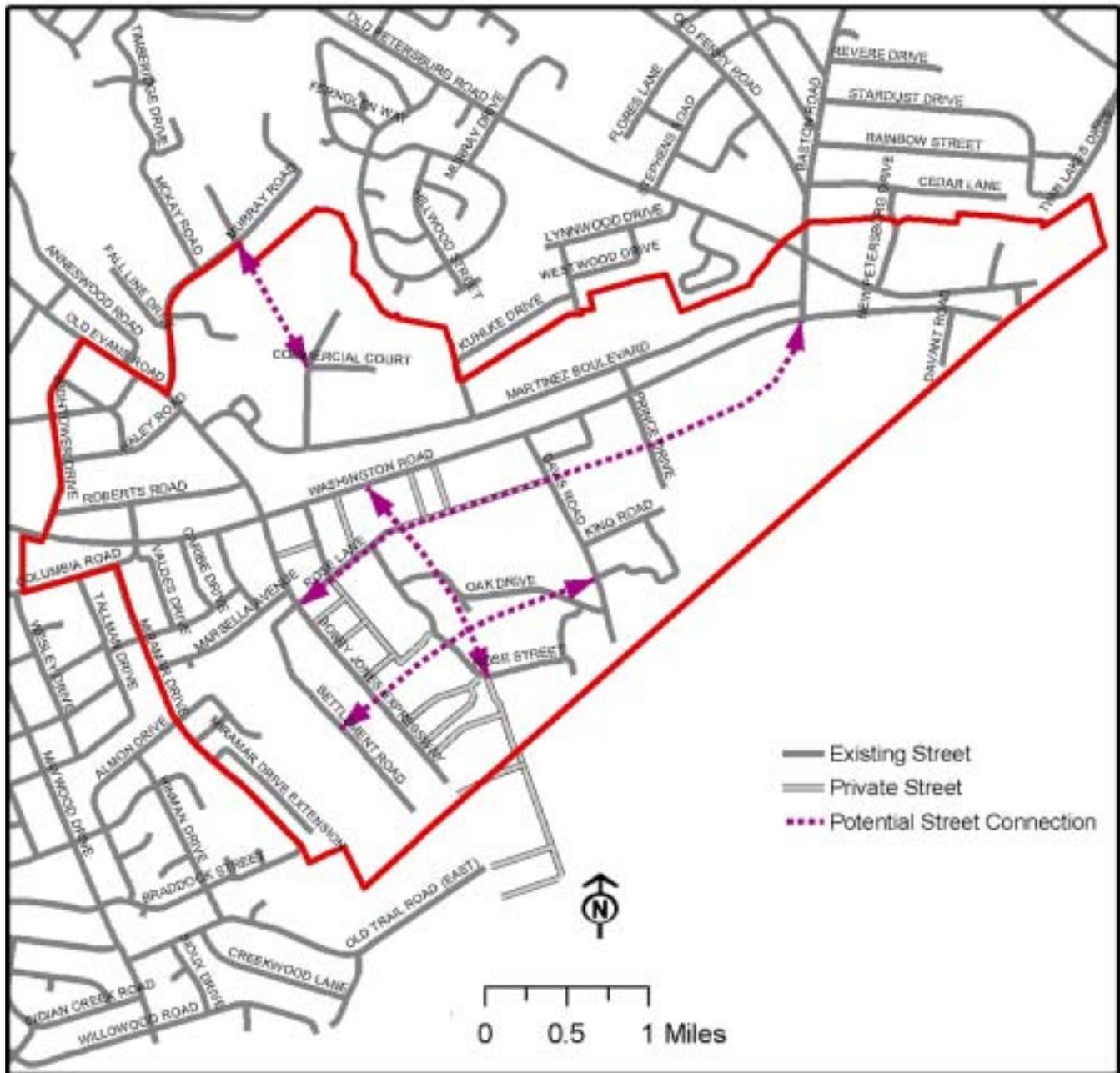


New development could include new streets, such as was done in this retail town center in Maryland

Threats

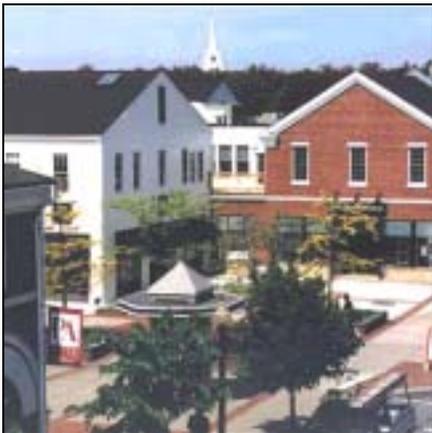
- Difficulty in applying a block and street pattern retroactively.
- Rail line north of Washington Road, which limits opportunities for new streets.
- Small parcels, which can be difficult to consolidate.

Streets and Blocks





A mother experiences a pedestrian-friendly public realm



A plaza surrounded by mixed-use buildings in Mashpee, MA



A park is the center of this neighborhood in Harbor Town, TN

1.3 PUBLIC REALM

Overview

Public spaces are foundations upon which American democracy is based. Whether plaza, park, or national forest, publicly owned spaces represent collective grounds shared by all Americans. They are the basis of many of the basic freedoms that many take for granted.

In a world where people are increasingly isolated from one another by technology and the fast-paced lifestyles it creates, people are increasingly recognizing the value of spaces that allow them to connect with other people. In fact, one of today's hottest real estate trends is the community where people can partake in a wide variety of public spaces on a daily basis. Many people no longer want to drive many miles to walk down a pleasant, tree-lined sidewalk, play in a park with their children, or relax on a warm summer evening. They now want communities that provide all of these public space opportunities and more.

There are five major categories of public space in the USA, each with their own distinct definition and applicability:

Streets and sidewalk are the most often used public spaces in towns and cities. In addition to serving as a transportation conduit, streets and sidewalks can be designed to encourage human interaction and community building. Streets can serve as parade routes or the location of special festivals, while in-town sidewalks can provide room for cafe dining, street furniture, and street trees.

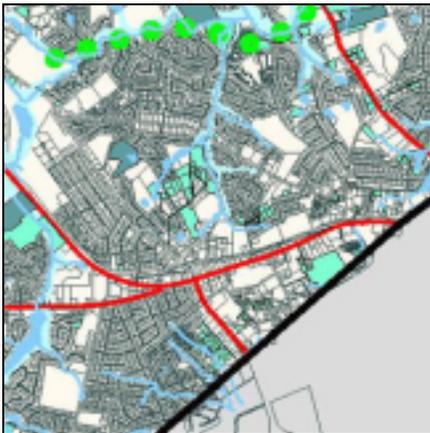
Plazas are hardscaped gathering spaces located in a town or city center and surrounded by commercial, mixed-use, or civic buildings. Plazas often include fountains, benches and similar elements. Their entire surface is accessible to the public and consists of stone, concrete, or durable pavement interspersed with trees and limited plant materials.

Parks are landscaped recreation and gathering places that can be located in any area of a town or city. They may be surrounded by residential or commercial buildings, and are often the focal points of neighborhoods. Parks often include picnic facilities, drinking fountains, benches, and playgrounds. Larger parks may include ponds, sports fields, and courts. Well designed parks are defined at the edges by streets. Their accessible landscape consists of paths, trees, lawns, shrubs and other plant materials.

Greenways are linear parks that can serve as corridors for transportation, wildlife migration, or protection of key habitats that occur in a linear manner, such as the riparian zones along creeks



This greenway is an environmental and recreational amenity



The Columbia County Greenspace Program identifies vacant lots in Central Martienz



A lone grave is hidden in the cemetery next to K-mart

and rivers. Greenways can also connect plazas, parks and conservation lands. Because of this, they can be located in virtually any setting with varying sizes.

Conservation Lands protect and enhance areas of environmental and historic significance. They are usually located at the end of a village, town or city. Because their primary purpose is the protection of open space, they can include camping sites and trails.

Existing Conditions

A quality public realm within the Study Area is, for the most part, lacking and poorly-defined. There are no public parks or plazas in the Study Area, although there is a historic cemetery just west of K-mart. The Columbia County Greenspace Program, “targets remaining vacant parcels in Evans-Martinez for acquisition/protection in order to provide small-scale pocket parks and passive open space,”¹ but this a blanket statement that does not take into consideration the location of those parcels or their appropriateness for parks. For example, the plan calls for protecting several vacant lots of Rose Street and Oak Court, even though their locations are disconnected and perhaps better used for other purposes. It also calls for protection of lands along Settlement Road, which appears to be somewhat more suited for park space. Parks and plazas should be located in locations that maximize their use and visibility, not tucked away from sight on leftover land.

The Greenspace Program notwithstanding, large public parks are neither likely not desirable in the Study Area, numerous opportunities exist to create plazas or small pocket parks as part of new redevelopment of underutilized properties; such could create a focal point for both the Study Area and the entire Martinez area. These, and other opportunities, however, could be lost with poorly planned future development.

The primary way to experience of the public realm in Central Martinez is through driving down the street. Years of auto-oriented planning have created streets, land-uses, and streetscapes that have ensured the primacy of the automobile as the transportation mode of choice. This said, even from a driver’s point of view, the public realm experienced from behind the wheel is anything but appealing in most parts of the Study Area. A variety of factors, including generic architecture, lack of landscaping, signage, and

¹ Columbia County. 2001. *Forward 2020: The Columbia County Growth Management Plan*. Evans, GA: Board of Commissioner of Columbia County, pp. 7-18.



Overhead utilities and signage create an unattractive public realm

aboveground utilities create a public realm that is chaotic, ugly, and rapidly approaching obsolescence.

The following summarizes the public realm strengths, weaknesses, opportunities and threats within the Study Area:

Strengths

- Vacant land, which could be partially utilized for parks or plazas.
- Private open space within some multifamily residential areas.
- Columbia County Greenspace Program, which supports small pocket parks and plazas within the Study Area.

Weaknesses

- Lack of quality public realm.
- Auto-oriented streets.
- Unattractive commercial streets.
- Missing sidewalks.
- Columbia County Greenspace Program, which calls for preserving vacant lands for parks and open spaces, regardless of their suitability for such.



Missing sidewalks create an unsafe public realm for pedestrians

Opportunities

- New public spaces on undeveloped land.
- New public spaces on redeveloped land.
- Greenway corridor along the rail line.
- Town center plaza or park.

Threats

- Development, which could occur without appropriate open spaces.
- Poorly designed open spaces, which could limit their use and fail to capitalize on the need for a community focal point.
- Poorly located open spaces, which could result when open spaces are relegated to the sites with least development potential.



New development could provide small pocket parks



Individual buildings can be arranged to form a continuous row

1.4 SPATIAL FORM

Overview

“Spatial form” refers to the way in which the placement and massing of buildings work together to form a space greater than the individual buildings. Different spatial forms have different impacts of human psychology and the ability of places to support certain activities. For example, most people like to feel protected while walking. This is best achieved by making people feel enclosed. From a psychological point of view, a street with a height to width ratio of between 1:1 and 1:3 provides the necessary enclosure. Therefore, if there is a desire to create an environment where walking is encouraged, said street should respect these ratios. The existence or lack of enclosure also has a direct impact on driver behavior; all else being equal, buildings close to the street psychologically narrow it and result in slight decreases in vehicular speeds.



Homes in this neighborhood are arranged to define a park space

Spatial form also takes into account the legibility of a place, or how easy it is for a visitor to quickly understand its overall organization. A figure ground study is a valuable tool for understanding this component of spatial form. In a figure ground study, the placement of buildings and their inter-relationships are reduced to a simple map showing their location on an otherwise blank background. This allows for an understanding of not just the buildings as objects, but, more importantly, the spaces between them which tend to reflect public or quasi-public space. As such, these spaces represent the most commonly experienced spaces of a community.

Existing Conditions

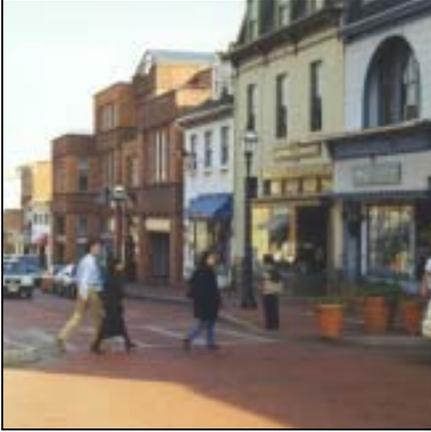
Central Martinez has a poorly-defined spatial form. With the exception of single-family homes and the common setback of many commercial parcels, there is little or no rhyme or reason to the placement of buildings or the organization of the spaces between them. Objects appear to be placed at random and with no regard for creating anything greater than themselves. Street are wide and framed with single-story buildings that are set back so far that they create no enclosure. This not only creates an environment that is pedestrian hostile, it also creates an area that is visually confusing and without any single space or focal that can be identified as the “there” spot of Central Martinez.

Strengths

- Residential neighborhood street enclosure.



There is no enclosure along Washington Road



Individual buildings can be arranged to form a continuous row

Weaknesses

- Lack of enclosure in commercial areas.

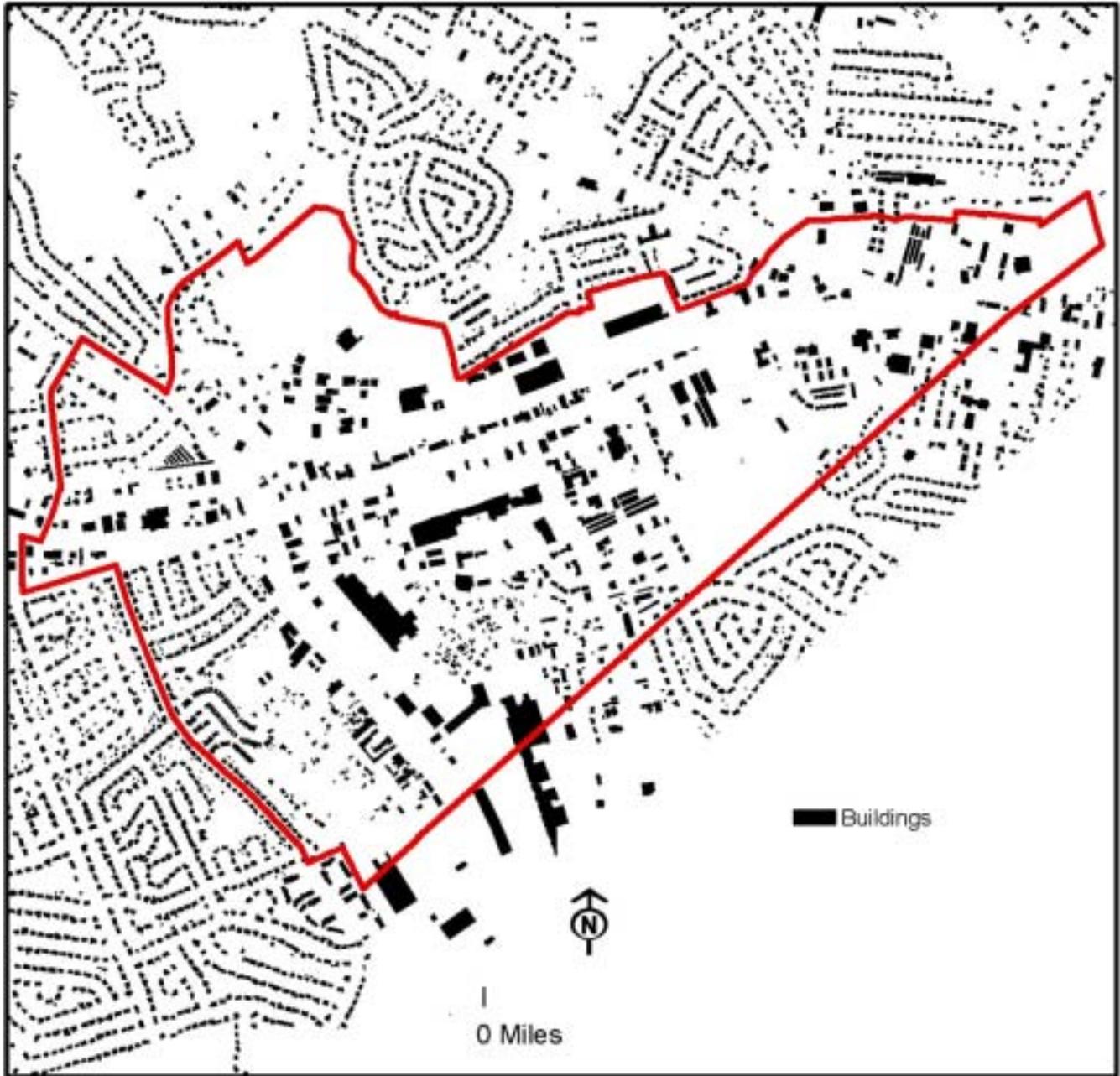
Opportunities

- Redevelopment, which can be programmed to occur in a cohesive manner.
- Creation of a focal point, which can begin to define a center for Central Martinez.

Threats

- Commercial prototypes, which often impose uncreative and contextually oblivious buildings upon a community.
- Zoning, which often forces building separation and fails to require the creation of cohesive spaces.

Figure Ground Study



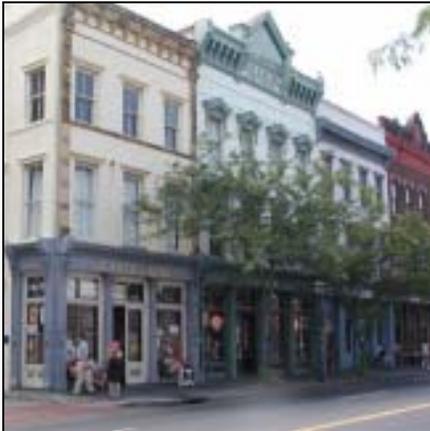


The Ebenezer Baptist Church in Atlanta dignifies the public realm

1.5 ARCHITECTURE & PLACEMENT

Overview

Until the turn of the twentieth century architecture was used to define and dignify the public realm. Buildings were placed to provide order to the street and enrich the pedestrian experience. Most buildings in villages, towns and cities came up to the sidewalk and fronted it with dignified entrances. Commercial buildings typically incorporated awnings/canopies, display windows, wide sidewalks, and sidewalk space for displaying goods or outdoor dining. Residential buildings either had stoops, porches, balconies or a small green space between the building or the sidewalk bordered by a low garden fence. All of these elements created buildings that were oriented towards the street and with a clear division between public and private space.



These commercial structures in Charleston create a pleasant streetscape

As time progressed, greater setbacks occurred for commercial and residential buildings. In the streetcar suburbs of the early 1900's, houses were usually set 10 feet from the sidewalk in the center of the neighborhood and 30 feet on the edge. As with older villages, cities, and towns, most early suburbs were within a five-minute walk of small commercial center or a transit stop. Many of the suburbs could not support commercial unless the housing density was a minimum of 6-7 units per acre.

Style variations notwithstanding, buildings and their orientation towards the street remained stable from 1900 until World War II. This all changed after WWII, when the car became the primary mode of transportation. With this change, both commercial and residential environments transformed from being pedestrian-oriented to vehicle-oriented. Highway standards and codes sympathetic to the motorist were enacted, and architecture and building placement became focused on responding to the automobile. The speed at which most people experienced their communities increased and buildings were placed farther from the street to accommodate frontal parking. As a result building detailing became less important than easy recognition; architecture became secondary to curb appeal. A few shrubs, trees and flowers with large signs were much more important than relationship to the street or respect for the public realm.



A wide porch on this Pittsburgh home enhances the street

Today, much of American architecture is defined by being easily recognizable. Chain retailers look the same everywhere, and homes are sold based on readily recognizable "curb appeal". The exteriors of buildings have become insignificant. As a result, much of America's newer areas are visually monotonous.



This retail plaza has no features to distinguish it, or Central Martinez, from other shopping areas

Existing Conditions

Architecture in Central Martinez is, for the most part, non-descript. Most commercial buildings found in the Study Area are single use, one story tall commercial prototypes lacking any architectural detail or reflection of the history of Columbia County or Central Martinez. Their horizontal scale also models fail to provide for mixed-use and result in every building being an object unto itself, with no compatibility with adjacent uses.

The commercial buildings are designed to accommodate the automobile, and not the pedestrian. None of the buildings define the public realm in a dignified manner. The Area's major streets are defined not by architecture, but by vast parking lots, signage and minimum landscaping found in front of each single use building. Additionally, many are not aging well, which creates the perception among consumers that Central Martinez is declining.



This old Folk National style home lies abandoned on Rose Lane

The residential architecture found in the Study Area is medium density single-family housing and townhomes that relate to the street slightly better. Many homes are brick, with a variety of styles that range from 1960s "modern" to a more recent mish-mash of styles. There are also some older Folk National homes within the core of the Study Area, leftover from before the area began to commercialize. An example is shown at left.

Architecture could be used in Central Martinez to develop a sense of place. Zoning could be used to create architecture that defines the area in a positive way. New buildings could be oriented to redefine the public realm and create a more walker-friendly neighborhood. More importantly, architecture could be used to develop a unique market identify for Central Martinez.

Strengths

- Local historic precedents.

Weaknesses

- Non-descript architecture.
- Buildings that poorly relate to the public realm.

Opportunities

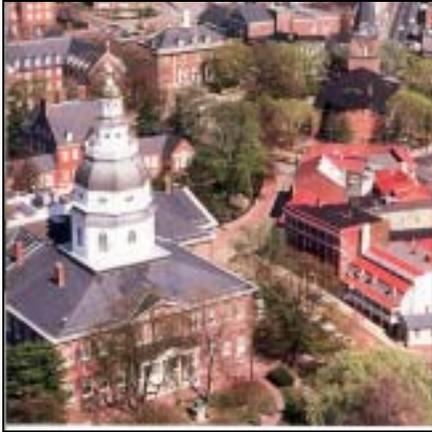
- Architectural standards or code requirements.
- New sense of identity through architecture.

Threats

- Inflexible commercial prototypes.
- Continued lack of identity could harm area's viability.
- Competition from new buildings in competing retail clusters.



The Evans Publix is better upkept than many Martinez businesses



Annapolis, MD, features a fine-grained mix of land uses

1.6 LAND USE AND LAND USE CODES

Overview

Land uses and the relationship between them impact the quality of life in a community. Different land uses have varying impacts on transportation and utility systems. The physical arrangements of these land uses and their proximity also support or discourage the use of different modes of transportation, including bicycling and walking; this can directly impact the vehicular system by reducing or increasing automobile traffic.

Towns and cities were traditionally built at mixed-use environments featuring housing, shops, offices, religious institutions, schools, parks, and factories all within a short walk of one another. As the benefits of mixed-use areas become known, it becomes increasingly important to understand the types of uses that can operate in close proximity. Many uses are very compatible, including retail, office, open space, civic and residential uses. Other uses, such as industrial and transportation services, are more difficult to reconcile with other uses in a mixed-use setting.



The rail line is a major Transportation /Communications/Utilities land use within the Study Area

Existing Land Uses

The Study Area's 782 acres contain a variety of uses organized into primarily single-use clusters. Commercial uses constitute the majority of the Study Area and are concentrated in the triangle formed by Washington Road, Bobby Jones Expressway, and the county line. West of Bobby Jones Expressway, land uses become primarily residential, with other pockets scattered throughout the Study Area. Other, less common uses are scattered throughout the Study Area. See the Existing Land Use map for more details.



Over time, unused parking could convert to other land uses

Land Use	Acres	% Study Area*
Medium Density Residential	130	17%
High Density Residential	69	9%
Office/Professional	20	3%
Commercial	334	43%
Industrial	18	2%
Transportation/Comm./Utilities	4	<1%
Public/Institutional	24	3%
Road	133	17%
Undeveloped/Vacant	50	6%

*Based on percent of total land area, Number may not sum correctly due to rounding.



Although not a land use category, a huge amount of the Study Area is utilized as commercial parking

Residential uses in the Study Area are primarily single-family homes or townhomes. Single-family residential uses (shown as Medium Density Residential on the previous page) are located in neighborhoods on the Study Area's western edge, while townhomes (High Density Residential) are more scattered and include a new development under construction on Commercial Boulevard.

The Study Area's commercial uses are marked by the low-density, automobile-oriented commercial uses commonly associated with Interstate interchanges. Many of these uses are fast food restaurants, gas stations, and shopping center. These uses, with their accompanying parking areas, are the defining characteristic of the Study Area.

Strengths

- Various land uses within the Study Area.
- Proximity of housing to retail.
- Single-family neighborhoods, which should be protected.
- Different commercial types.

Weaknesses

- Lack of connectivity between land uses.
- Horizontal segregation of uses.

Opportunities

- New development mixing housing with commercial.
- Horizontal mixed-use, wherein uses are close to other uses.
- Vertical mixed-use, wherein different uses are on top of other uses.
- Retail and housing trends now favoring large-scale, mixed-use environments.

Threats

- Zoning, which prohibits mixed-uses in C-2.
- Commercial sprawl, whereby existing retail facilities are abandoned in sake of newer ones.
- Financial markets, which can make it difficult to finance mixed-use projects.

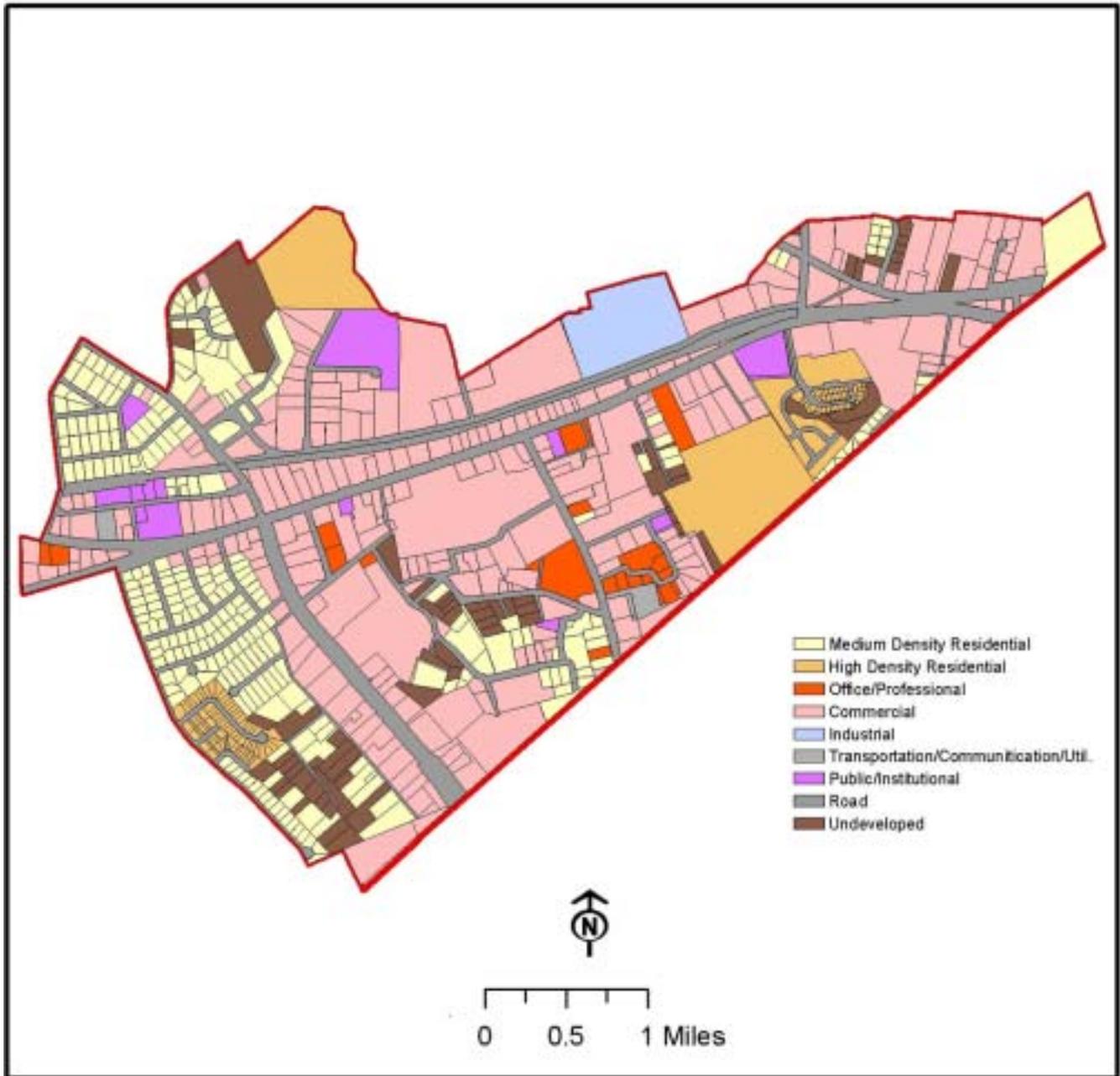


These townhomes in North Carolina have small shops at ground level



Nationwide, old shopping centers are being vacated in favor of new ones

Existing Land Use





This former residential neighborhood is classified as Commercial



Miramar Drive, the western edge of the Study Area, is classified as Residential-Medium Density

Future Land Use Classifications

The Columbia County Growth Management Plan establishes future land use classifications for all areas of the county. The classifications need not comply with current on-the-ground land uses, but rather reflect desired long-term land use changes. Under Georgia law, the future land use plan serves as the legal basis for rezoning activity on the part of the county. Therefore, it is important that such plan accurately reflects the desired vision for the subject area. In this way, these classifications should serve as a guide for directing public infrastructure improvements that support the desired future land use.

Within the Study Area, the Columbia County Growth Management Plan shows Commercial within the majority of the Study Area. The residential neighborhoods on the western side of the Study Area are shown as Residential – Medium Density, while the townhomes development south of Washington Road, on the Study Area's eastern edge, are shown as Residential-High Density.

Strengths

- Various classifications within the Study Area.

Weaknesses

- Current plan segregates residential and commercial.
- Extensive Commercial classification within the Study Area.

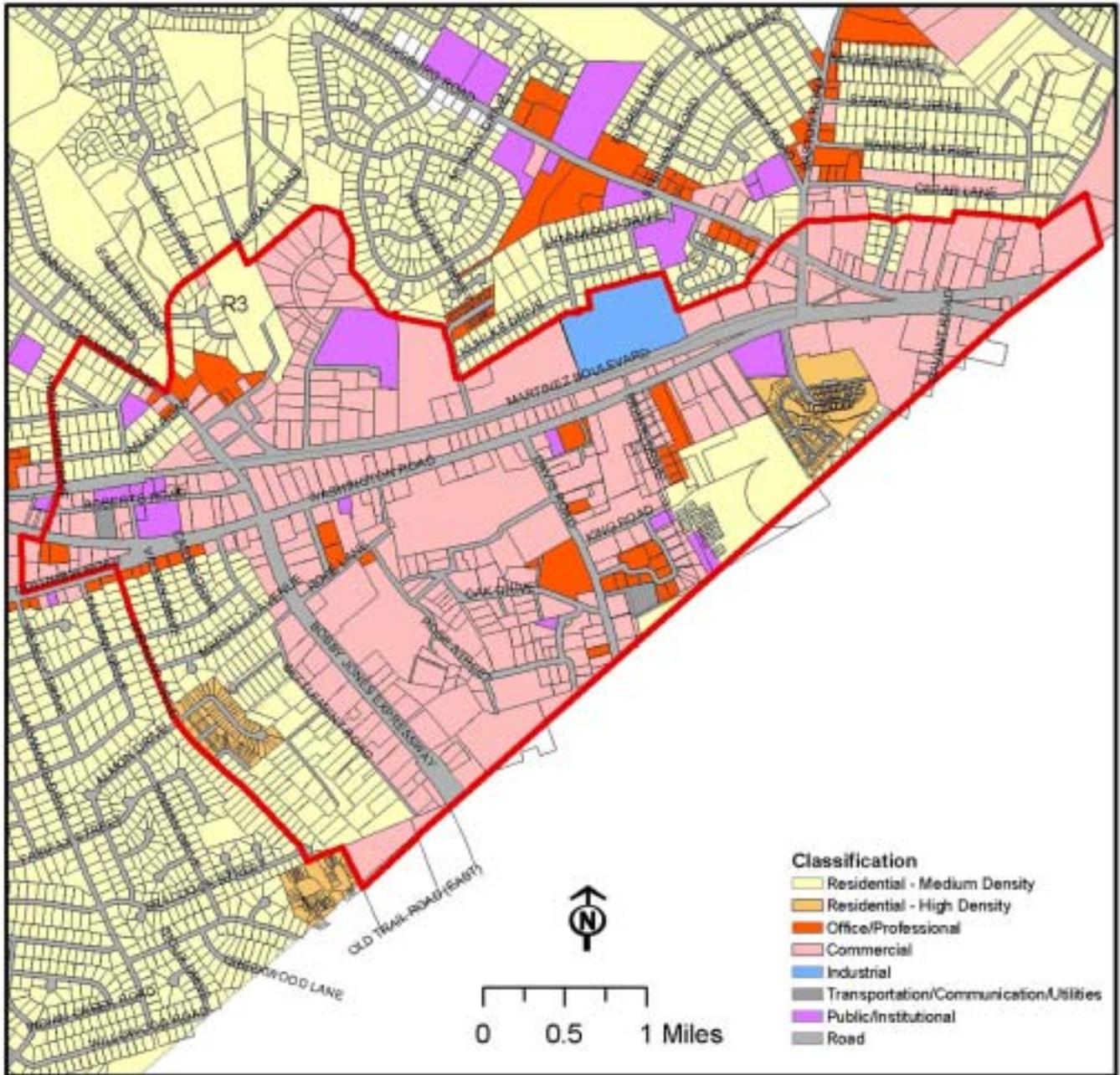
Opportunities

- Changes to Future Land Use Map.

Threats

- Resistance to change.

Future Land Use Classifications





Current C-2 zoning permits many automobile-oriented uses in Central Martinez

Zoning Designations

Columbia County regulates the development of property through the use of zoning districts. These districts control things such as height, use, setbacks, parking, etc. They are the implementation tool of the Columbia County Growth Management Plan and should support the desired future land uses. Because it directly shapes development, zoning has a profound impact on built environment. More than any other single element, a community's zoning code affects how a community looks and functions for decades.

There are several zoning districts present in Central Martinez. Non-residential districts constitute the majority of the Study Area, and include C-C (Community Commercial), C-2 (General Commercial), C-3 (Heavy Commercial), P-1 (Professional), S-1 (Special) and M-1 (Light Industrial). Residential districts are less frequent and primarily located on the periphery of the Study Area; these include R-3 Single-Family Residential, A-R Apartment Residential and PUD Planned Unit (Development).



Zoning can support pedestrian-oriented land use patterns and buildings

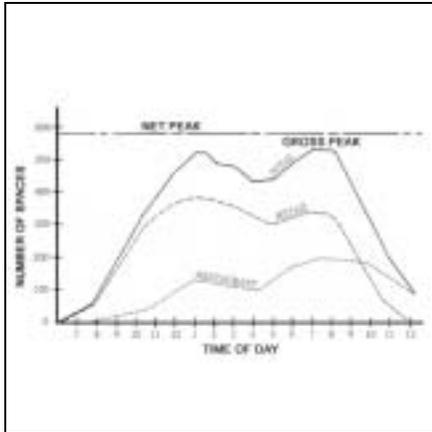
With the exception of the PUD district, the zoning districts with Central Martinez are predominantly single-use. R-3 and A-R permit no commercial uses. Similarly, in C-C, C-2, C-3, S-1 and M-1 the only residential uses permitted are single and two-family detached homes, subject to approval as a conditional use by the board of commissioners.

Zoning is largely responsible for the disconnected and auto-oriented character. There are no sidewalk requirements and street and sidewalks connections between new developments are not encouraged. In fact, the code requires a buffer or "no man's land" between residential and commercial districts. While this may be appropriate when commercial uses are auto-oriented big-box retailers or other conventional formats, such is not desirable when developed with smaller-scale, neighborhood-oriented businesses.



Walkability is impossible when stores are set hundreds of feet from the road

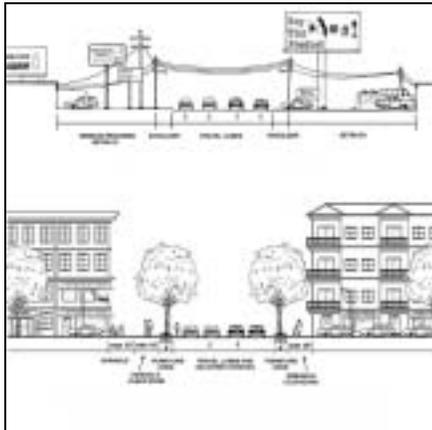
In commercial districts the front setback from the centerline is 55 feet on streets, 90 feet on collectors, and 125 feet on arterials. The purpose of this is to ensure that adequate room for potential road widening, but it also makes it impossible to build pedestrian-oriented, street fronting buildings without going through a variance process. On streets where widening is unlikely, it may be possible to permit buildings closer to the street to encourage walkability on key local or collector streets. Minimum lot widths of 100 feet and side setbacks of 20 or 30 feet also make it impossible to recreate Main Street-style shopping environments where buildings are narrow and continuous, unless such is developed by a master-developer as one parcel. Commercial districts also do not require sidewalks to be built unless new development includes a new public street. In existing areas this virtually ensures that no new sidewalks will be built.



The Urban Land Institute provides a shared parking model to determine how much parking is really needed

Commercial parking requirements prohibit most shared parking; this encourages more parking than may be needed, particularly when uses that are opened at different times are located in the same center. Luckily, opportunities for reductions are provided by administrative variance.

Signage regulations in commercial zoning districts also reinforce the auto-oriented nature of Central Martinez. Although much of Central Martinez is in the General Sign Overlay District, freestanding individual signs with an area of up to 150 feet and a height of up to 20 feet are permitted. These are even greater for freestanding signs are part of a planned center. Wall signs are permitted up twenty percent of wall area up to maximum of 200 square feet. These sizes and heights are clearly intended to make signs visible from far away to drivers traveling by at high speeds. When viewed into the context of existing overhead utilities, they also contribute to visual clutter. Other parts of Columbia County, most notably Evans Town Center, have customized sign ordinances that require smaller signs.



Zoning can transform an area over the long-term

Residential districts have front setbacks varying from 150 on arterials, to 120 feet on collectors, to between 75 and 100 feet on local streets, depending on the district. They also allow parking in the front yard, which is detrimental to creation of a visually pleasing and pedestrian friendly community. There are also no design guidelines in zoning for new residential uses.

Strengths

- Mix of districts within the Study Area.
- Administrative variation of parking requirements.

Weaknesses

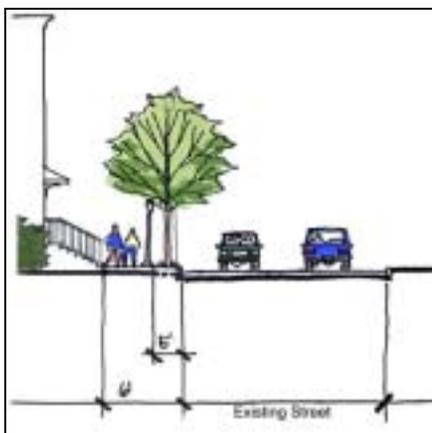
- Sign regulations.
- Lack of design requirements.
- Parking regulations, which prohibit shared parking.
- Setbacks, which prohibit sidewalk-oriented buildings.

Opportunities

- Creation of a new Central Martinez zoning district.
- Sidewalk and connectivity requirements.

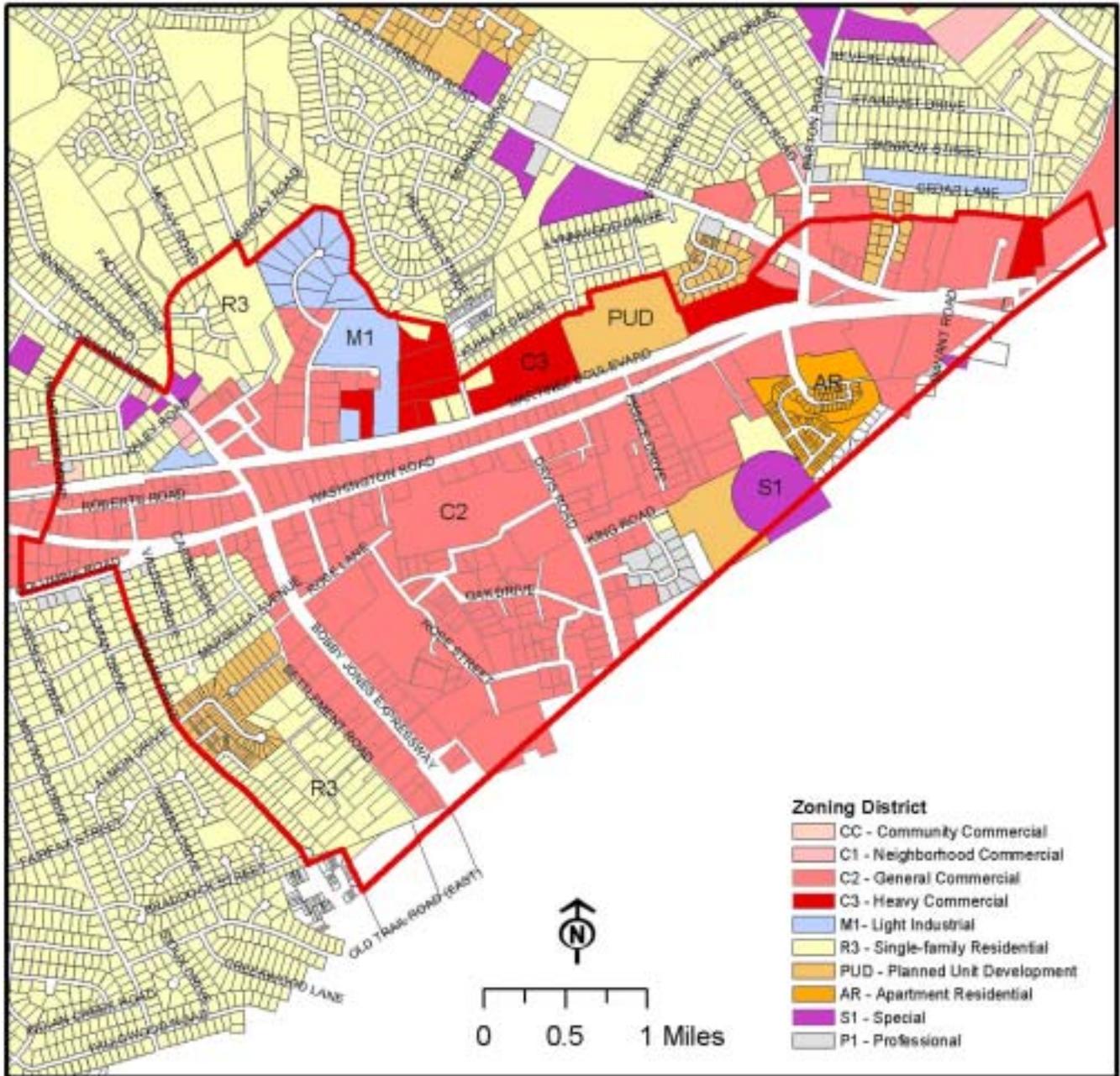
Threats

- Resistance to zoning changes.



Zoning can require wide sidewalks and pedestrian-oriented buildings

Existing Zoning



1.7 PEDESTRIAN SYSTEMS

Overview

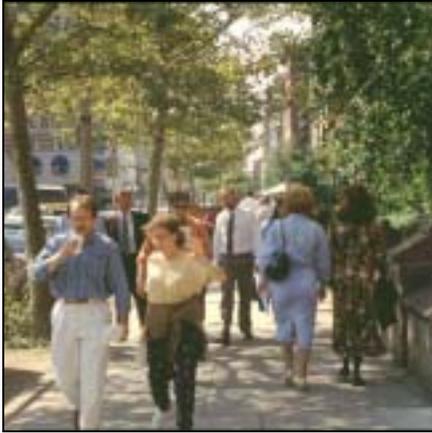
Because every trip begins as a pedestrian trip, the walking experience within the Martinez Study Area is critical to understanding the current transportation system. Pedestrian trips are also important as they have the opportunity to take the stress off of vehicular systems and create a safer Study Area.

Existing Conditions

Overall, the existing pedestrian experience is very poor within the Central Martinez Study Area. The lack of safe pedestrian facilities (sidewalks) combined with an auto-focused urban form and aesthetic design creates a hostile and unwelcome walking district. The clues that pedestrians need to feel welcome and opt for their feet over a car trip are not there. There are a few elements that contribute to this initial negative inventory.

The presence or absence of sidewalks is a very primary factor in judging the pedestrian transportation network. The average width is approximately five feet, the minimum width required to walk two abreast comfortably, but not a particularly generous dimension. Another item that can encourage pedestrian activity, but is lacking, is a buffer or planting strip. A planting strip is a space dedicated to vegetation or other improvements that helps to shield or buffer the pedestrian from vehicular noise and offense. Most importantly it can be a place where large trees can be planted to act as a hedge against moving vehicular traffic and provide shady respite for walkers during warmer months.

Other transportation systems or modes can adversely impact the pedestrian system - a balancing act that needs careful consideration. The number of lanes that a pedestrian needs to cross and the total width of a road are very important to ensure that all persons can cross an intersection safely. There are very large pedestrian obstacles that bisect the area rather than unite. Washington Road and the Bobby Jones Expressway are both high speed, wide corridors that are very unsafe and uncomfortable for pedestrians to cross. To compound the issue, most intersections are not stripped adequately. Most intersections have free right turns, which are very difficult for pedestrians to negotiate, and few pedestrian cross signals. Additionally numerous and wide curb cuts are another very dangerous and discomfiting occurrence for pedestrians. Each curb cut presents a challenge and potential for conflict between cars and people.



Every trip begins and ends on foot



A planting strip is present, yet provides no real protection



Washington Road is pedestrian hostile



This route in front of this shopping center serves as a route for pedestrians and motorists, but is not designed for either.

Large block sizes, limited pedestrian routes, and circuitous streets also create a pedestrian-unfriendly environment by contributing to longer trips and, consequently, discouraging non-motorized modes such as walking.

Private driveways are another issue that discourage and cause confusion for pedestrian travelers. They often serve as streets, but are rarely designed as such. They are often shortcuts through the middle of blocks (often parking lots) and shorten a trip on foot. However, they are usually intersected with many parking lanes, lacking sidewalks, and with very few traffic control devices.

Strengths

- Existing sidewalks.

Weaknesses

- Missing sidewalks and lack of connectivity.
- General pedestrian-hostile area.

Opportunities

- Road improvements can improve walking as a mode of travel within and through the study area.
- Curb cut consolidation.
- New comfortable sidewalks on all streets.
- Shade trees in planting strips.
- Striped pedestrian crossings.
- Pedestrian curb extensions.



Routes such as these on private streets serve a vital function of connecting local roads and providing shorter routes with slower traffic.

Threats

- High traffic volumes, which make right of way is precious.
- Difficulty balancing pedestrian and vehicular needs and space.



This arterial in Portland, OR, has well-marked crosswalks



Bicycling is a form of both recreation and transportation

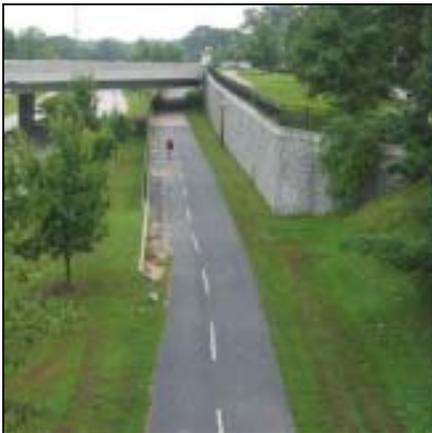
1.8 BICYCLE SYSTEMS

Overview

Bicycles are an increasingly important means of transportation, particularly for low-to-middle income families. Any well-balanced transportation system must include bicycle facilities to ensure a range of mobility options. Bicycle facilities can take two major forms.

Off-street facilities are generally 10 to 12 feet wide paved areas that permit bicycle travel in two directions. Lanes may or may not be striped. Usually, these facilities are built in conjunction with greenways.

Bicycle lanes are striped one-way on-street facilities. They are usually located next to the curb and designed so those bicyclists move in the same direction as traffic. In Georgia, bicycle lanes are required to have a minimum width of five feet if they are to be designated as such. It is possible, however, to stripe narrower widths, provided they are not labeled such. Bike lanes are necessary on most streets with an average vehicular speed greater than 25 miles per hour. On streets with slower speeds, bicyclist can ride safely with traffic.



This off-street bicycle facility is part of a greenway system in Atlanta

Existing Conditions

Within the Central Martinez Study Area there are no bike lanes or off-street facilities, however some of the streets have slow enough traffic to safely accommodate bikes within the vehicular lanes. The major State routes do not fall into the bikeable category, as speeds and, sometimes, volumes exceed what would be comfortable for bicyclists. These routes, however, are prime candidates for bicycle lanes.

The lack of a well-connected street system poses another challenge. In the absence of bicycle lanes on key streets, would-be cyclists have no other option than to risk their lives in traffic. A series of lower traffic streets would provide opportunities for safer travel.

Strengths

- Slow speed local streets.

Weaknesses

- No bicycle lanes on arterials or collectors.



A bike lane in Toronto provides safety for cyclists



There are no bicycle racks in the Study Area

- Dangerous bicycling environment.
- Lack of bicycle racks.

Opportunities

- Bicycle lanes on arterials and collectors.
- Increased connectivity through the creation of new streets.

Challenges

- High traffic volume, which make right of way is precious.
- Difficulty balancing pedestrian and vehicular needs and space.



Chart showing maximum vehicle capacity per lane at 25-30 miles per hour

1.9 TRAFFIC SYSTEMS

Overview

Traffic system operations are affected by a variety of factors, including intersection operations, light timings, turning movements, volume, capacity, and speeds. The interface of these different components affect each other and define the ability of the whole system to operate efficiently and as part of a well-balanced system.

The organization of streets also directly impacts the ability of the traffic system to operate efficiently. An interconnected system is inherently superior to a *dendritic* system from a traffic point of view. Two two-lane streets in a network can carry more vehicles than one four-lane street, it also results in shorter trips, fewer turns, shorter signal phasing, and less clearance time. Additionally, by providing more, narrower streets, transportation systems provide more routes of travel and reduce the likelihood that the entire system will be thrown into paralysis by an accident or other event.

Existing Conditions

Several Central Martinez roadways were designated as capacity-deficient in the *Forward 2020: Columbia County Growth Management Plan*. These roadways are listed below.

- Washington Road (SR104) – from Bobby Jones Expressway to Columbia Road
- Bobby Jones Expressway – from Washington Road (SR104) to I-20
- Old Evans Road - from Washington Road (SR104) to Old Petersburg Road
- Martinez Boulevard – Commercial Boulevard to Baston Road.

The criteria used to designate capacity-deficiency were the *Highway Capacity Manual* (HCM) level-of-service (LOS) for arterial segments and a Columbia County planning goal of a LOS C (i.e., average travel speed > 22 mph) or better. As noted in the growth management plan, the arterial procedures and LOS designations in the HCM are only appropriate for major arterials were not intended for application to roadways such as Old Evans Road and Martinez Boulevard. It should also be noted that the capacity on major arterials is a function of geometric capacity (i.e., number of lanes) and the operational capacity (i.e., traffic signal timing). In many



Washington Road



Davis Road



The intersection of Washington Road and Bobby Jones Expressway



Martinez Boulevard has adequate vehicular capacity but lacks sidewalks



Roadwork was recently done on eastern Washington Road.

cases, the operational capacity is the controlling factor in the performance of a roadway.

The following are key existing conditions within the Study Area:

- Average travel speeds along major arterials in the area are currently acceptable, ranging from 15 mph to > 45 mph. The speed at which a street can handle the most vehicles per lane is between 25 and 30 miles per hour.
- Substantial queuing issues resulting at Bobby Jones Expressway at Washington Road intersection resulting from adjacent railroad tracks. Three trains were observed between 7 am and 9 am. As Old Petersburg Road is upgraded, there may be an opportunity to grade separate Old Evans Road and the tracks.
- With the exception of the interference caused by the trains, all study intersections appeared to function acceptably.
- Along the 1-mile stretch of Washington Road from Bobby Jones Expressway to Baston Road, there are more than 45 access points (driveways, side streets, etc.) per mile. The HCM indicates that roadways with more than 40 access points per mile generally exhibit a 10 mph reduction in free-flow speed. From an operational standpoint, such a reduction means that the capacity of the roadway is reduced as a result of the “friction” caused by vehicle turning in and out of all of these access points and slowing down to do so. Such a lack of access management also affects the ability to safely accommodate bicycles and pedestrians. While frontage roads are not practical, there may be opportunities for consolidation of access points along the corridor.

Additionally, the existing roadway network to the southeast of the Bobby Jones Expressway at Washington Road intersection (includes Rose Lane, Rose Street, Oak Drive, etc.) is substandard (narrow, meandering, poorly maintained, etc.), and includes the following:

- These roads serve traffic to and from the scattered residences and commercial developments in the area.
- Oak Street and Rose Lane serve the adjacent shopping centers as well as substantial cut-through traffic for vehicles avoiding the Bobby Jones Expressway at Washington Road intersection.
- There is a limited amount of cut-through from Bobby Jones Expressway to Davis Road via Oak Drive.



Operations at this intersection could be improved

- The intersection of Rose Lane at Bobby Jones Expressway is crowded by the intersections on the other side of Bobby Jones Expressway of Marsella Avenue and Settlement Road. Operations at these intersections and along Bobby Jones Expressway would be improved by a realignment project that resulted in only one intersection.

In summary, the following strengths, weaknesses, opportunities and threats were identified within the Study Area:

Strengths

- Existing capacity.
- Acceptable average speeds.

Weaknesses

- Capacity deficient arterials.
- Excessive curb cuts and resulting turning conflicts.
- Substantial queuing issues resulting at Bobby Jones Expressway at Washington Road.

Opportunities

- Curb cut consolidation.
- Intersection improvements.
- Increased capacity by achieving speeds between 25 and 30 miles per hour.
- Creation of new routes.

Threats

- Continued traffic growth.



The rail line contributes to significant queuing issues at Bobby Jones Expressway and Washington Road



Much of the Study Area is covered by impervious surfaces

1.10 INFRASTRUCTURE

Overview

Infrastructure is the foundation upon which successful communities are built. Infrastructure supports development and economic growth by providing essential services such as water distribution, wastewater collection and treatment, and stormwater management. Effective and efficient infrastructure systems are essential to the continued health of a community.

Existing Conditions

The Study Area is served by water, sewer, and stormwater systems managed by Columbia County. Existing conditions in the Study Area for each of these systems are described below:



A stormwater intake on Washington Road

Water Supply. The existing water distribution network provides complete coverage to the Study Area. Larger water mains, generally 10 or 14 inches in diameter, are found along major roads such as Washington Road and the Bobby Jones Expressway. Smaller lines are found along minor roads and in residential subdivisions. The County operates two potable water plants, the Point Comfort Road Water Treatment Plant on the Savannah River and the Clark's Hill Plant on Clark's Hill Reservoir.

Sewer. The existing wastewater collection and treatment system provides service to most of the Study Area. Data provided by the County indicate a gap in service along the Bobby Jones Expressway between the Richmond County line and Rose Lane. It is possible that parcels in this area may be connected to the sewer system, since the locations of individual service connections are not known. Most of the sewer lines in the Study Area were constructed in the 1970's and 1980's. Sewers in the Study Area are typically 8-inch gravity sewers. Portions of the Study Area near the county line are apparently served by Richmond County.



A swale on Martinez Boulevard

Stormwater. The Study Area covers parts of two drainage basins, with Washington Road marking the approximate boundary between the two. The area north of Washington Road is in the Reed Creek basin. This basin generally drains north and northeast towards Reed Creek and eventually to the Savannah River. The area south of Washington Road is in the Crane Creek basin. This area drains into Crane Creek which flows southeast into Richmond County. Crane Creek flows into Rae's Creek, which ultimately discharges into the Savannah River near downtown Augusta. The Study Area falls within the boundary of the Stormwater Utility, which assesses user fees to fund streambank stabilization, regional sedimentation and retention ponds, drainage channel



Adequate capacity exists to support redevelopment of underutilized land

improvements, and other infrastructure repair and replacement projects in the most densely populated areas of Columbia County. Portions of Reed Creek in Columbia County are designated by the Georgia Department of Natural Resources as not meeting State water quality standards. Much of the Savannah River in Columbia and Richmond Counties is designated as partially meeting State water quality standards. These areas may have more stringent requirements for stormwater quality and retention time.

Strengths

- Extensive water and sewer coverage.
- Stormwater Utility is currently in place.

Weaknesses

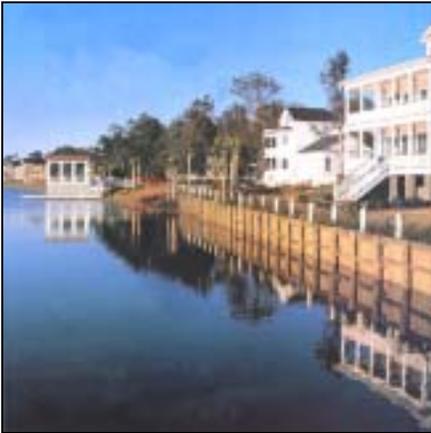
- Aging infrastructure.
- Streams do not meet water quality standards.

Opportunities

- Redevelopment can utilize existing infrastructure.
- Stormwater Utility funds are dedicated to the area.
- Utilize greenspace for stormwater management.

Threats

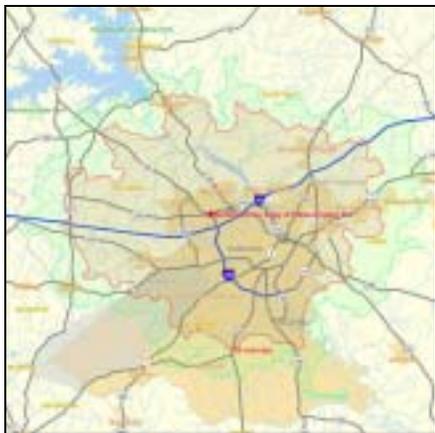
- Maintenance costs may increase due to age of systems.
- Impervious surfaces contribute to stormwater runoff.
- Runoff can cause erosion of streambanks.



Stormwater can be used to enrich development potential and raise property values.

Existing Sewer System





Residential and retail market areas for Central Martinez

1.11 DEMOGRAPHICS PROFILE

The demographic characteristics of the Martinez retail trade area and residential market area are provided in this section. The retail trade area is defined by a 20-minute drive from the intersection of Bobby Jones Expressway and Washington Road while the residential market area consists of a larger 25-minute drive area. Both areas are defined as the geographic area from which the large majority of potential customers or residents of new housing constructed in the study area originate.

Population and Household Growth

The 2003 population estimates for the market areas are 309,188 and 343,988 for the 20-minute and 25-minute drive areas respectively. Corresponding average annual growth rates from 1990 to 2003 were a moderate 1.19% and 1.27%. Forecasted annual growth rates through 2008 are set slightly lower at .96% and .99%, which are significantly below the 2.5% growth projected for Columbia County.



Upscale neighborhoods lie to the north of the Study Area

Population Growth: 1990 - 2008

	1990	2003 (estimate)	% APR	2008 (forecast)	% APR
20-Minute Drive Area					
Population	267,618	309,188	1.19%	324,031	0.96%
Households	98,609	116,568	1.40%	123,270	1.15%
Avg. Household Size	2.67	2.59		2.57	
25-Minute Drive Area					
Population	295,376	343,998	1.27%	360,996	0.99%
Households	108,316	129,614	1.51%	137,345	1.19%
Avg. Household Size	2.67	2.59		2.57	

APR = Average Annual Percentage Rate



Children benefit the most from walkable communities



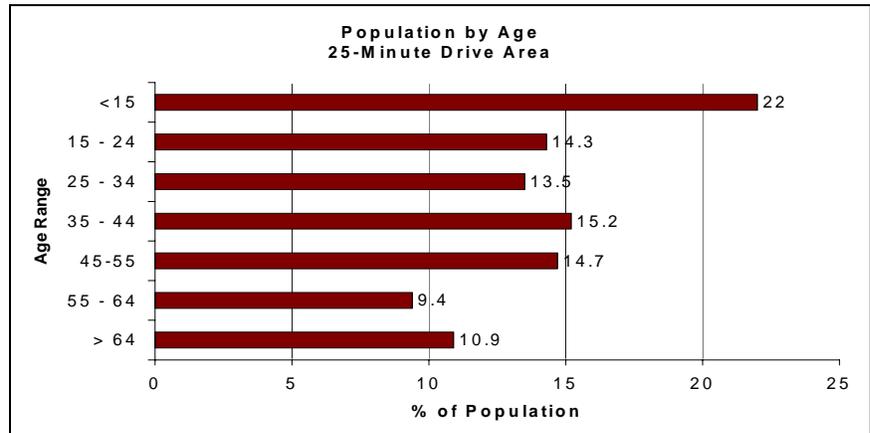
This home in the West Lake subdivision, north of Martinez, is on the Market for \$1.2 million



New traditional-styled homes near the Study Area

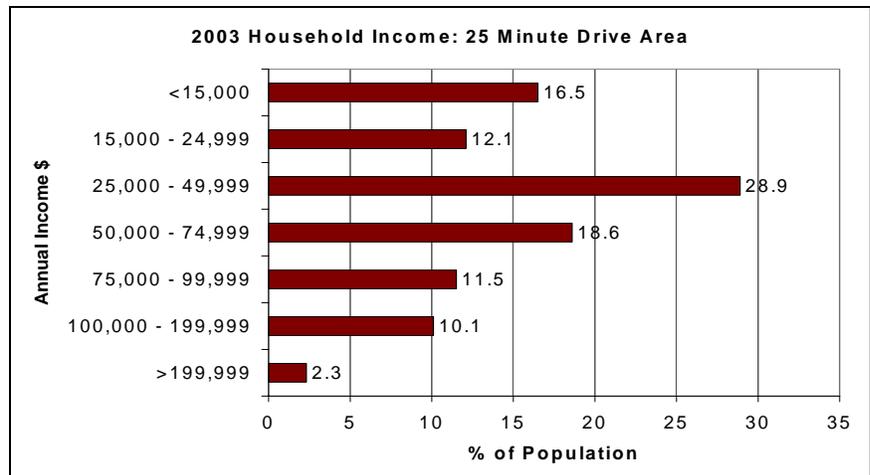
Age Distribution

In 2003, the median age within the 20 minute drive area is estimated at 35.6 years and 35.1 years in the 25-minute drive area. The distribution of the population by age ranges is virtually identical for both of these areas, and closely parallels the state of Georgia figures. Prime consumer age categories, ages 25 – 64, make up approximately 53% of the population.



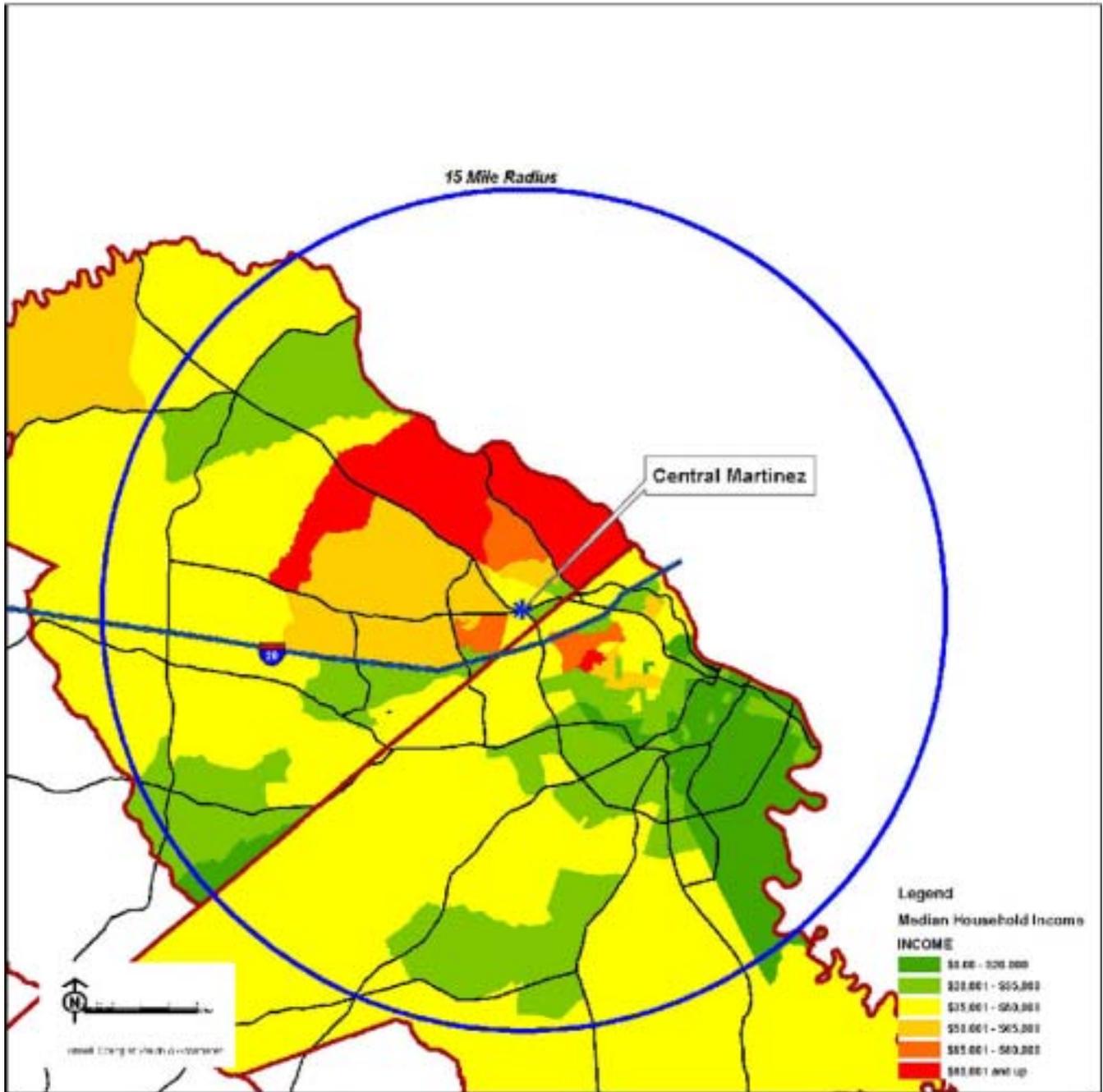
Household Income Distribution

Estimated 2003 market area annual household income is approximately \$43,000 for both the 20 and 25 minute drive areas. As with age, the percentage of population within each distribution range is nearly identical for both the 20 and 25 minute market areas.



Although household income levels within the 20 and 25-minute drive areas are below the State of Georgia’s \$48,000 median, the 2003 median household income within Columbia County is estimated at \$65,551. The following map indicates the level of affluence that exists within a short drive of the study area.

Household Income Distribution



Racial Composition

Within the 20 and 25 minute drive areas, an estimated 57% and 58% of the populations, respectively are white, 38% and 37% are African-American, and 5% are categorized in other racial groups.



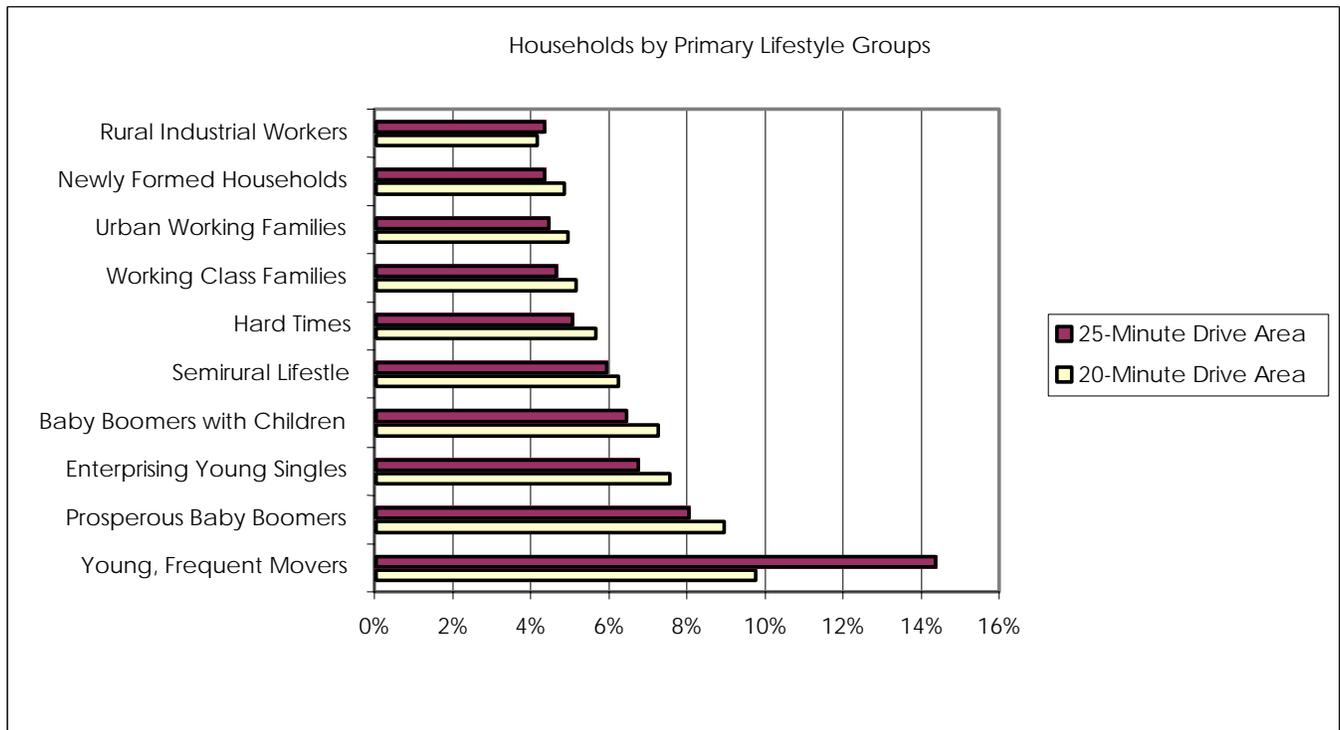
Enterprising Young Singles prefer to live in higher-density, multifamily housing that is within a short walk of shops and entertainment venues

Lifestyle Characteristics

Using A Characterization of Residential Neighborhoods (ACORN) methodology, households within the market area have been grouped into clusters or segments bearing descriptive terms meant to convey a type of neighborhood or lifestyle useful for consumer marketing and planning purposes. Enough variation exists between the 20 and 25 minute drive areas to show both sets of data. The following ten categories account for approximately 65% of the market area.

While the characteristics of each of the groups vary, households within both areas are predominately young to middle age, range in income and most likely have children living at home. Single family and mobile homes are the primary housing type. Although incomes vary, many of these households are active consumers, frequently centering purchases on the home, recreation and necessities.

A Characterization of Residential Neighborhoods (ACORN) data has also been generated for the three Columbia County zip codes that make up the area north of I-20. Twenty-seven percent (27%) of these households fall within the Prosperous Baby Boomers, 15% are within the Semirural Lifestyle Group and 8% are categorized as Enterprising Young Singles. Clearly these households are a valuable market for new retail and residential development within the study area.





The Market Area is a major employment center, although much of it is retail-oriented

Employment Trends

After declines in most sectors in 2001 and 2002, employment in the Augusta MSA is projected to increase in 2003 by 1%, according to the Selig Center. The Service Sector is the largest employer in the MSA, followed by government, retail and wholesale trade, and manufacturing. In 2002, the largest employers in the MSA were: Augusta-Richmond County Government, Columbia County School System, Georgia Department of Human Resources, MCG Health, Inc., Medical College of Georgia, Richmond County Schools, U.S. Army, U.S. Veterans Administration, University Health Services, and Wal-Mart.

Unemployment in the Augusta MSA was above state levels (5.8% to 5.1%) with the highest unemployment rates in Richmond and McDuffee Counties. Columbia County had the lowest unemployment rate in the MSA (3.4%) and among the lowest in the state. Columbia employs 20,491 at an average weekly wage of \$501.

Employment within a one-mile and two-mile radius of the Study Area (from the intersection of Bobby Jones Expressway and Washington Road) is displayed on the next page. Almost 9,000 workers are employed in a one-mile radius in 867 businesses; more than 21,000 workers are employed within a two-mile radius by 1,820 businesses. Of the workers in the one-mile area, 37% are employed in the retail trade sector, primarily by eating and drinking establishments. Service businesses within this same area outnumber retail trade businesses: 334 compared to 207.

Businesses and Employment - 2002

Industry	1-Mile Radius				2-Mile Radius			
	Businesses		Employees		Businesses		Employees	
	#	%	#	%	#	%	#	%
Agriculture and Mining	23	2.7%	99	11.4%	42	4.8%	176	20.3%
Construction	86	9.9%	556	6.2%	159	8.7%	1,015	4.8%
Manufacturing	47	5.4%	515	5.7%	82	4.5%	2,234	10.5%
Transportation/Communication/Utilities	20	2.3%	164	1.8%	51	2.8%	552	2.6%
Wholesale Trade	46	5.3%	1,018	11.3%	83	4.6%	1,328	6.2%
Finance/Insurance/Real Estate	95	11.0%	707	7.9%	217	11.9%	1,756	8.2%
Retail Trade	207	23.9%	3340	37.2%	373	20.5%	5,375	25.2%
Services	334	38.5%	2,464	27.5%	792	43.5%	8,660	40.7%
Public Administration	6	0.7%	90	1.0%	11	0.6%	149	0.7%
NonClassifiable Establishments	3	0.3%	18	0.2%	10	0.5%	56	0.3%
Total	867	100.0%	8971	110.3%	1820	102.5%	21301	119.5%



Augusta Exchange is a major player in the Market Area's retail profile

1.12 RETAIL PROFILE

Existing Conditions

By the year 2002, retail sales in Columbia County had reached \$935 million, increasing 176% from \$338 million in 1992. In Richmond County, retail sales increased by 72% during this period from \$1.7 billion to \$2.9 billion.

The Augusta retail market is largely expanding to the northwest suburbs of Evans and Martinez, following population growth and relatively high income levels. Consequently, once popular retail centers, such as Augusta West on Wrightsboro Road, are experiencing low vacancy rates and even closures. Augusta Mall, the last remaining enclosed regional mall in Augusta, has not been immune to this trend, as well as the overall difficulties being experienced by many enclosed malls throughout the nation.

Within the study area, most retail and commercial uses are concentrated along Washington Road and Bobby Jones

Surveyed Shopping Centers: 2003

<u>Center</u>	<u>Type</u>	<u>Sq. Ft.</u>	<u>Occupancy</u>	<u>Lease/Sq. Ft.</u>	<u>Location</u>
1. Village Plaza	RPC	473,000	91%	\$14-\$16	Augusta
2. Anderson's Plaza	NSC	51,000	100%	\$10-\$12	Augusta
3. Bobby Jones Plaza	CSC	50,300	100%	\$10	Augusta
4. Columbia Square		Being redeveloped as a Car Mall			Augusta
5. Washington Corner	NSC	53,290	96%	\$7-\$10	Augusta
6. Le Pavilion	NSC	38,620	97%	\$9-\$11	Augusta
7. National Hills Shopping Center	CSC	181,099	98%	\$15	Augusta
8. Furrys Ferry Plaza	NSC	83,000	96%	\$14	Martinez
9. Centre at Furrys Ferry (partially built - Phase II in initial lease-up)	NSC	24,000	75%	\$14.50	Martinez
10. Evans Town Center	NSC	75,835	92%	\$12	Evans
11. Merchant's Village	NSC	70,130	94%	\$12	Martinez
12. Evans Crossing	NSC	92,051	100%	\$8-\$13	Evans
13. Augusta Mall	SRM	1,066,000	NA	\$20-\$24	Augusta
14. West Town Market Square	CSC	203,399	100%	\$14-\$16	Augusta
15. Village West Shopping Center	NSC	79,000	100%	\$8.50	Augusta
16. Augusta Exchange	RSC	625,000	96%	\$16.50-\$17.50	Augusta
17. Augusta West	CSC	207,951	63%	NA	Augusta
18. Surrey Center	NSC	60,220	100%	\$13-\$13.50	Augusta

*RPC = Regional Power Center, NSC = Neighborhood Shopping Center, CSC = Community Shopping Center
SRM = Super Regional Mall*



Main Street-style town centers are today's hottest retail trend

Expressway, with a lesser amount along Martinez Boulevard. Both lack a distinct identity, and are typical auto centric commercial strips. Augusta's most recent regional shopping center, Augusta Exchange, has become a retail destination for area residents. It has been successful at attracting high profile national discount and big-box retailers. Despite the success of this particular center, local residents reportedly travel to Atlanta or Charlotte to shop for higher end merchandise.

Eighteen shopping centers were surveyed for this study, with six located within or immediately bordering the study area. Occupancy rates among these centers are strong, averaging 98%, with lease rates ranging from \$9 - \$16 sq. ft. All were built prior to 1990.

Retail Market Demand

A retail demand analysis was completed to provide market support for retail uses in the retail trade area and the study area. Expenditure potential by type of merchandise is applied to population figures to obtain potential sales volume for trade area residents. Given the fact that expenditures of households residing in the area immediately north of the study area are significantly above those of trade area residents and that these households will be a primary target market for new retail development in the study area, per household expenditures are adjusted to better reflect potential sales within the study area.



Restaurants that cater to the after-work crowd could do well in Central Martinez

The study area has the potential to capture 10% of the total increase of potential sales in the trade area in the next five years, representing a total of 201,797 square feet of retail space. Between 2008 and 2013, the study area's capture of potential demand for retail space could potentially increase to 11% or 122,901 square feet. For the 10-year period, the total potential capture for new retail space for the study area is 324,698 square feet. The category of merchandise that shows the largest potential demand for new space is Shoppers Goods at 162,671 square feet for the 10-year period. Estimates of potential demand should be considered conservative as demand generated by persons living outside of the market area (e.g., over 20,000 employees who work within two miles of the study area and visitors) are not included.



A shopping destination could pull from outside the Market Area

Primary target markets for retail development in the study area are market area residents, employees that work at nearby businesses and visitors. Recognizing that market area residents will generate the largest share of sales at study area businesses, demographic and Lifestyle data as well as retail spending and purchasing activity are used to identify the types of businesses that would be most appealing to area residents. Recommended businesses include: home furnishings and accessories, electronics, PCs/accessories, pet supplies, gardening supplies, men's, women's and children's clothing, shoes, sports equipment, outdoor gear, children's toys and inexpensive jewelry. Take-home/prepared meals, a specialty market,



Quality restaurants should be target for Central Martinez

video rental, day care, drycleaner/alterations and exercise studio/gym are types of convenience goods and services that would appeal to residents within a short drive of the study area. One-of-a-kind restaurants (e.g., ethnic cuisine, deli, sidewalk cafes, pizza, family restaurants, dessert/coffee) and expanded entertainment options (e.g., movie theater, bar/grille, nightclub, farmer's market, outdoor theater, concerts and community events) should also be targeted.



Existing townhomes in the Study Area



A street of single-family homes west of the Study Area



East Columbia County is experiencing rapid residential growth

1.13 RESIDENTIAL PROFILE

Existing Conditions

Within the Study Area, residential areas range from established neighborhoods (west of Bobby Jones) to more recently developed starter homes (north of Martinez Boulevard and off Devant) to deteriorating neighborhoods weakened by encroaching development (between Davis and Bobby Jones). General housing data for the study area and corresponding geographical areas is as follows:

Within the Martinez CDP (Census Designated Place), 63% of the homes are valued between \$50,000 - \$149,999. Two and three person households were most popular in this CDP in 2000, accounting for 34% and 23% of owner occupied units respectively and 27% each for renter occupied units. Housing development here boomed in the 1980's, when 43% of total housing units were constructed. Columbia County's housing growth is even more recent, with 37% of units constructed in the 1990's. From 1999-2002, more than half of all units permitted were in unincorporated Columbia County, indicating brisk activity there.

The For-Sale Housing market in Richmond-Columbia Counties is centered on homes priced in the \$80,000-\$140,000 range. In 2002, a total of 3,123 homes were sold in the five geographic areas, with the highest sales volume in east Columbia County (62%) followed by northwest Richmond County (20%). The median sales price within the five geographic areas was highest in

	<u>25-Minute Drive Area</u>	<u>Augusta MSA</u>	<u>Columbia County</u>
Owner Occupied Housing (vs. Rental)	73%	70%	82%
Median Value of Owner Occupied Housing	\$97,760	\$95,676	\$131,606
% Single Family Detached (of Owner Occupied Units)			86%
% Low Density (4 units or less per building) of all rental units			59%



A street of modest ranch homes within the Study Area

east Columbia County and lowest in northeast Richmond County (\$134,000 vs. \$69,900). Several sales agents interviewed for this study expressed the view that the demand for townhomes and higher density single family markets is high. Prices for this type of product range widely from \$69,000 to as high as \$146,000.

Within Columbia County, several large scales communities are planned or under construction, ranging from 330 acres to 2000 acres. Seven higher density developments are profiled in the Appendix, ranging from \$70,000 for 1100 square foot units to \$160,000 for nearly 2000 square foot homes.

Fourteen apartment projects in the Martinez area were also surveyed for this study, totaling 2,923 units. Most (nine) had occupancy rates of 95% and higher, indicating a tight market. However, despite strong population growth in Columbia County, there is only one apartment community currently planned or under construction in the county.



Central Martinez fails to provide quality, professional apartments, such as these in Maryland

Renter profiles obtained from interviews with on-site managers and agents show rental unit tenants are typically young and older professional, military personnel, hospital employees and medical students.

Rental Overview			
Average Occupancy Rate	94%		
Average Age of Facility	18 yrs old		
	% of All Apartments	Avg. Monthly Rent	Avg. Size (SF)
One-Bedroom Units	35%	\$512	694
Two-Bedroom Units	61%	\$641	1,016
Three-Bedroom Units	3%	\$764	1,239



The demand exists for quality townhomes in the Study Area

Residential Market Demand

A statistical demand analysis was performed for the residential market area to estimate the potential market depth for for-sale housing and rental housing. The two main sources of annual potential demand for housing are new household growth and turnover. New household growth is traditionally used to project market growth and is based on population and household growth projections. Projected owner or renter occupied households are qualified or segmented by owner or renter turnover rates (derived from the 2000 Census), owner-renter preferences, income, household size and ACORN Lifestyle data.



Central Martinez has the potential to capture a number of new housing units equal to a typical Traditional Neighborhood Development



For-sale, single family homes on smaller lots could achieve the necessary price points and create a "village" feel

The analysis assumes that a majority of prospective study area homebuyers will have annual incomes of \$35,000 and higher and live in one to three person households. Potential annual demand for for-sale units in the market area is estimated at 1,190 units. The study area has the potential to capture 3.9% of market area demand or 464 units under a 10-year housing program.

The rental demand analysis assumes that prospective study area renters will have annual incomes of \$25,000 to \$50,000 and live in one to three person households. Estimates for annual potential demand for rental units in the market area is 1,335 units. Of this demand, the study area could potentially capture 5.9% or 788 units in a 10-year program.

Total residential demand for the study area over a 10-year period is potentially 1,252 units, 37% for-sale and 63% rental.

Opening price points of for-sale units should range from \$80,000 to \$140,000. While some nearby for-sale projects have sales prices that exceed \$140,000, it is our opinion that when unit prices rise above this level, demand will begin to thin out.

Based on current monthly rents at the market rate rental communities in the competitive market area, market rents in the general range of \$650 to \$850 for a two-bedroom unit would be achievable in the study area.

Early residents of newly developed housing in the study area are likely to be relatively mobile, well educated, active and somewhat adventuresome with few or no children. Employees working in or close to the study area should be an initial target market for new housing, particularly young people, singles and couples with few or no children and empty nesters. Longer term, groups outside of the market area such as married couples with and without children, empty nesters, retirees and professionals that work within commuting distance of their jobs should be targeted.