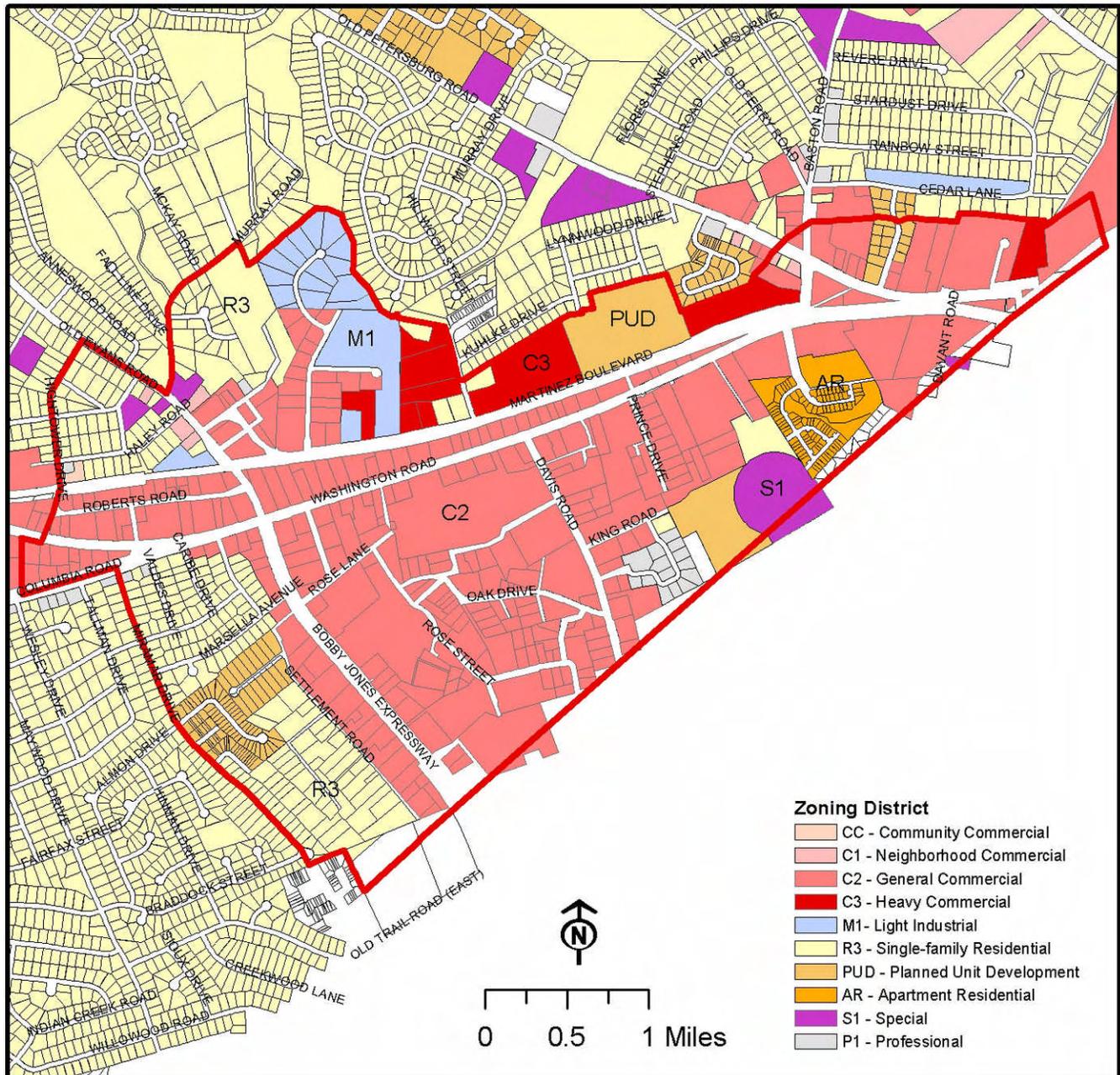


# Existing Zoning



## 1.7 PEDESTRIAN SYSTEMS

### Overview

Because every trip begins as a pedestrian trip, the walking experience in Central Martinez 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 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 several elements that contribute to this negative inventory.

The presence or absence of sidewalks is a 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 in much of the Study Area, is a planting strip adjacent to parking lots. A planting strip is a space dedicated to vegetation or other improvements that helps to shield or buffer pedestrians from parked cars. Most importantly it can be a place where large trees can be planted to act as a hedge against moving vehicular traffic and provide shade for walkers during warmer months. Zoning requires such strips, but many parking lots were built before they were mandated.

Other transportation systems or modes can adversely impact the pedestrian system; therefore careful balancing of the various modes needs to be considered. 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 it. 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 dangerous and discomfiting occurrence for pedestrians. Each curb cut



*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.*

presents a challenge and potential for conflict between cars and people.

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 and bicycling.

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, such as parking lots, which shorten the distance on foot. However, they are usually intersected with many parking lanes, lacking sidewalks, and with very few traffic control devices.

The following summarizes the pedestrian system's strengths, weaknesses, opportunities, and threats within the Study Area:

Strengths

- Existing sidewalks.
- Existing requirements for a ten foot wide planting strip adjacent to parking lots

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.
- Striped pedestrian crossings.
- Pedestrian curb extensions.

Threats

- High traffic volumes, which make right of way precious and could limit bicycle lane opportunities.
- Difficulty balancing bicycle and vehicular needs and space.



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



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



*Bicycling is a form of both recreation and transportation*

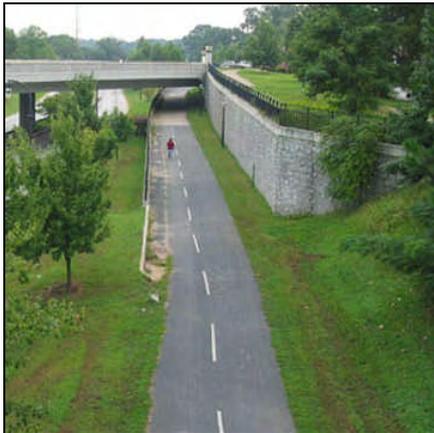
## 1.8 BICYCLE SYSTEMS

### 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 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.

The following summarizes the bicycles system's strengths, weaknesses, opportunities, and threats within the Study Area:

#### Strengths

- Slow speed local streets.



*A bike lane in Toronto provides safety for cyclists*



*There are no bicycle racks in the Study Area*

### Weaknesses

- No bicycle lanes on arterials or collectors.
- 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.

## 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 affects each other and define the ability of the whole system to operate 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 and 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

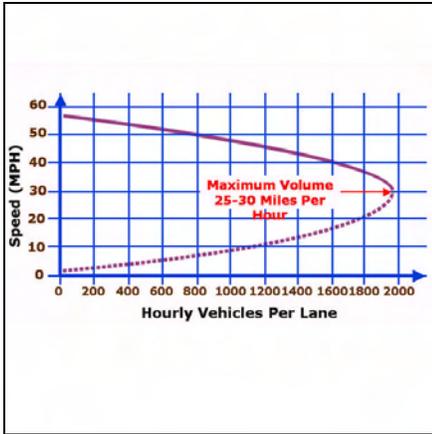


Chart showing maximum vehicle capacity per lane at 25-30 miles per hour



Washington Road



Davis Road



*The intersection of Washington Road and Bobby Jones Expressway*

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

The following are key existing conditions in the Study Area:

- Average travel speeds along major arterials are currently acceptable, ranging from 15 mph to over 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 and Washington Road intersection resulting from adjacent railroad tracks. Three trains were observed between 7:00 am and 9:00 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 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.



*Martinez Boulevard has adequate vehicular capacity but lacks sidewalks*

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.



*Roadwork was recently done on eastern Washington Road.*



*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 the 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. The 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



*Adequate capacity exists to support redevelopment of underutilized land*

channel 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.

The following summarizes the infrastructure’s strengths, weaknesses, opportunities, and threats within the Study Area:

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

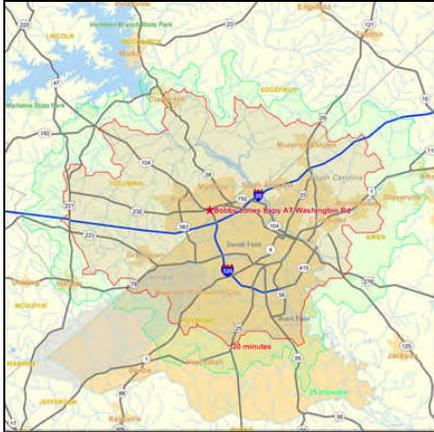
- Maintenance costs may increase due to age of systems.
- Impervious surfaces contribute to stormwater runoff.
- Runoff can cause erosion of streambanks.



*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 driving 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 0.96% and 0.99%, which are significantly below the 2.5% growth projected for Columbia County.

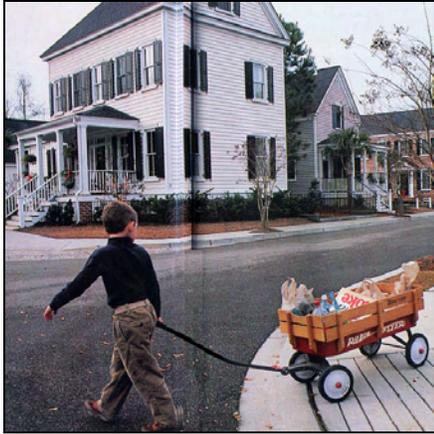


*Upscale neighborhoods lie to the north of the Study Area*

#### Population Growth: 1990 - 2008

	1990	2003 (estimate)	% APR	2008 (forecast)	% APR
<b>20-Minute Drive Area</b>					
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	
<b>25-Minute Drive Area</b>					
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



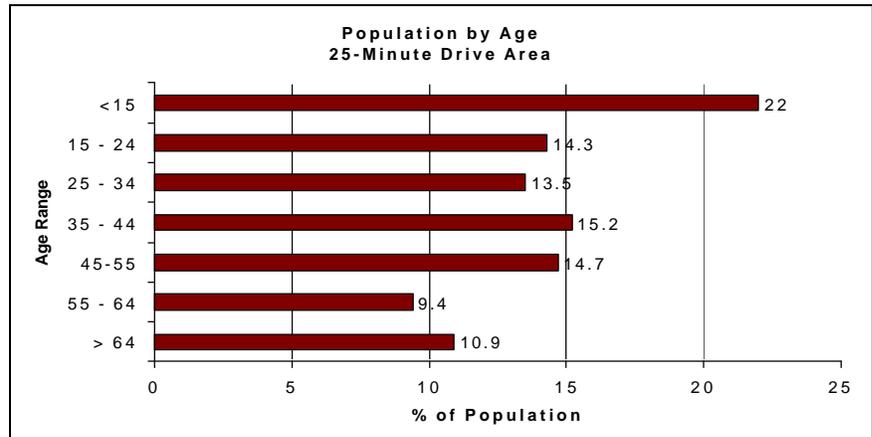
This home in the West Lake subdivision, north of Martinez, is on the Market for \$1.2 million



New traditional-styled homes near the Study Area

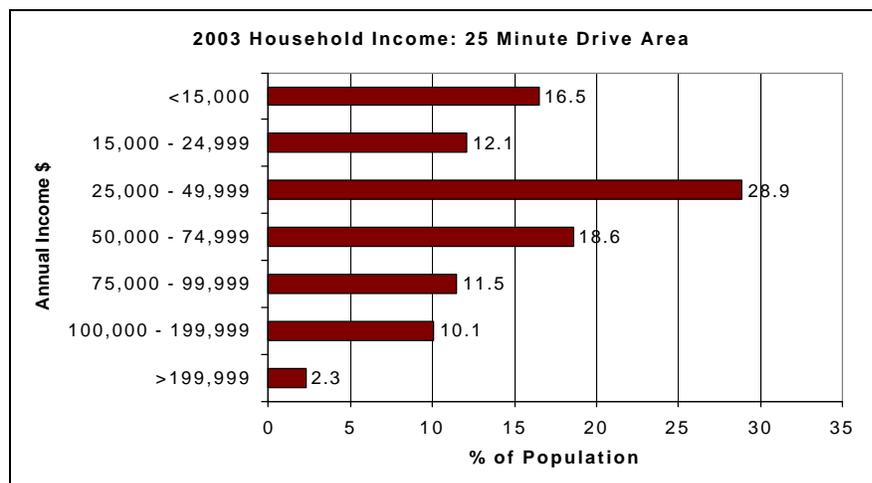
### Age Distribution

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.



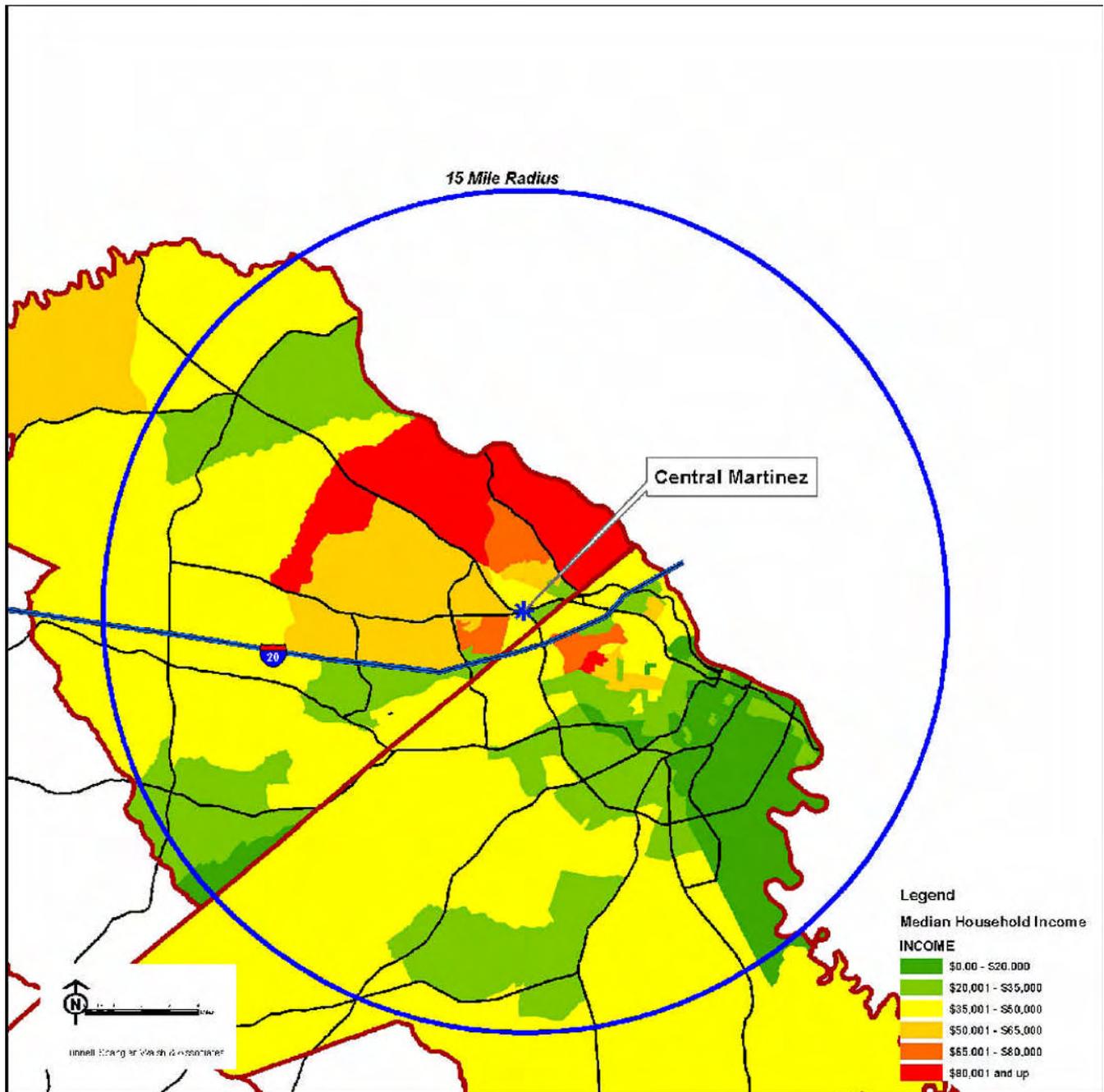
### Household Income Distribution

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 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.



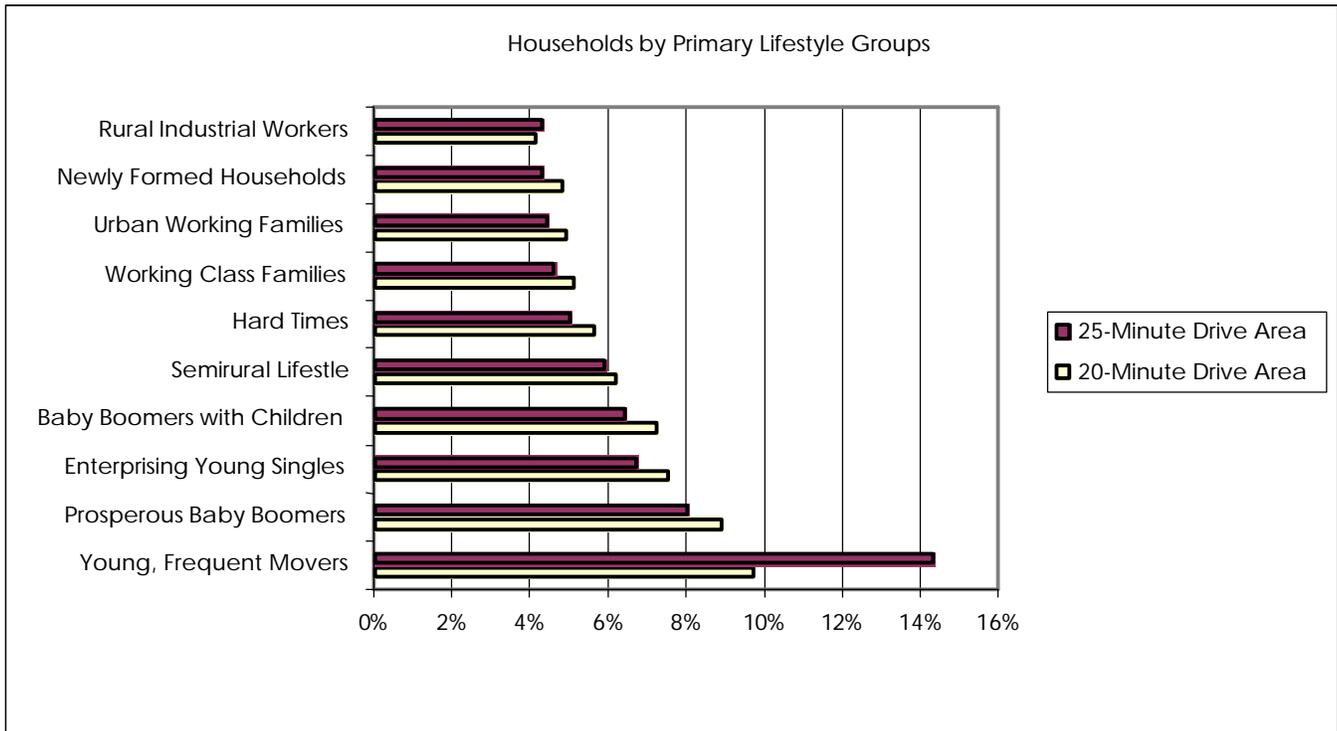
*Enterprising Young Singles prefer to live in higher-density, multifamily housing that is within a short walk of shops and entertainment venues*

### Lifestyle Characteristics

ACORN – A Classification of Residential Neighborhoods – categorizes neighborhoods throughout the nation into specific consumer groups or market segments. Using ACORN methodology, households in the market area have been grouped into clusters bearing descriptive terms 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 groups varies, the 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 Metropolitan Statistical Area (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, 23.9% are employed in the retail trade sector. Service businesses within the 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. Shoppers Goods include apparel, furniture, and similar non-food items. 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,



*Quality restaurants should be target for Central Martinez*

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, 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.

## 1.13 RESIDENTIAL PROFILE

### Existing Conditions



Existing townhomes in the Study Area

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).

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.



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

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 east Columbia



East Columbia County is experiencing rapid residential growth

<b>Housing Overview</b>			
	<b>25-Minute Drive Area</b>	<b>Augusta MSA</b>	<b>Columbia County</b>
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*

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.

<b>Rental Overview</b>			
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.