

# Market Analysis

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## Medical Offices in Columbia County, Georgia



Columbia County Planning & Engineering  
September 24, 2009



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## Executive Summary



*Columbia County Justice Center*

Columbia County is a rapidly-growing, affluent suburb of Augusta, Georgia, the second largest metropolitan area in the state. Augusta's strong medical industry is anchored by the Medical College of Georgia in neighboring Richmond County, which graduates more medical doctors each year than any other school in the University System of Georgia. A large number of those graduates practice locally, resulting in an extremely high concentration of physicians in Richmond County.

Columbia County, on the other hand, is relatively underserved. Despite a large, growing market for medical services in Columbia County, there are not many medical offices. If more office space is developed, then physicians will likely locate in Columbia County. A list of sites suitable for medical offices has been compiled by county staff to help facilitate development.

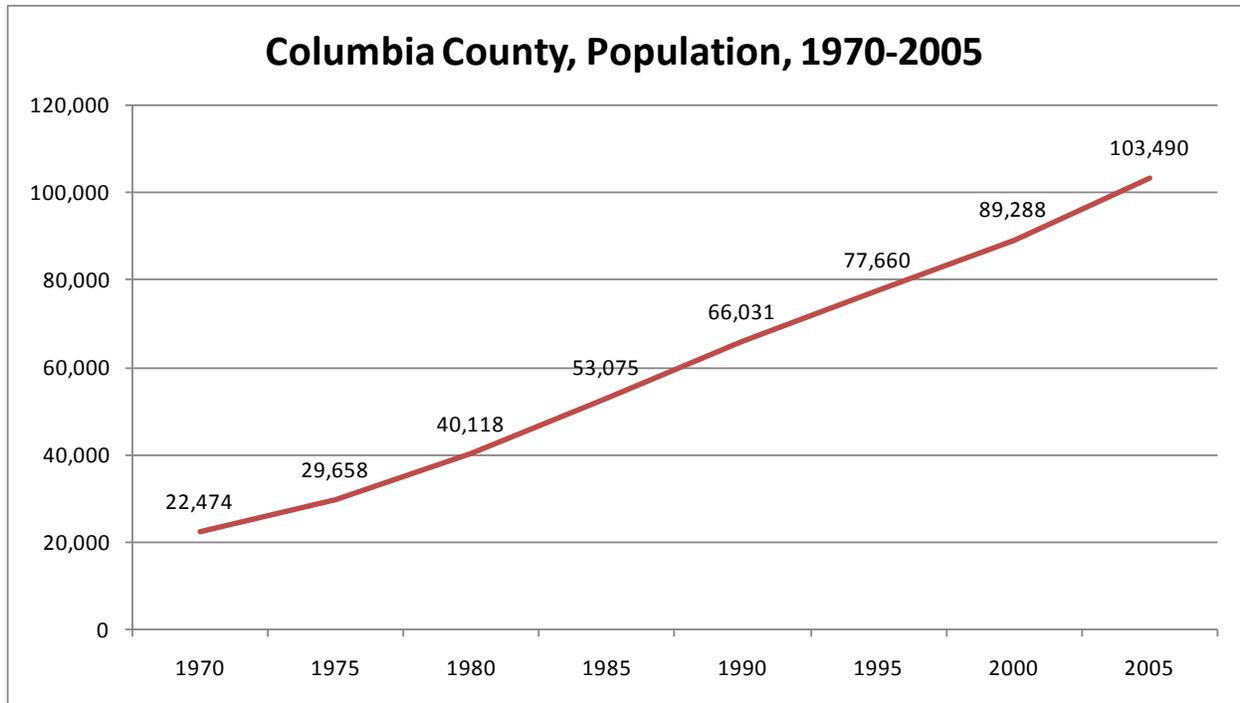


*Clarks Hill Lake in Columbia County*

## Demographics

Columbia County is part of the Augusta, Georgia metropolitan statistical area (MSA). Augusta’s population of over 500,000 places it second only to Atlanta in MSA population within the state of Georgia. Columbia County is also the fastest growing county in the metro Augusta area. Rapid growth began in the 1970s as Columbia County emerged as an upper-middle-class suburb, highly desirable due to its excellent school system and high quality of life.

**Chart 1** (Source: U.S. Census Bureau, 2005)



As of 2008, the county’s population is over 110,000 and continues to grow. Household income is higher than any other county in the Augusta area. High home values and low unemployment are also indicators of a strong local economy. Additionally, a large senior population combined with a high rate of insurance coverage demonstrates a strong local market for medical services.

**Chart 2** (Source: U.S. Census Bureau, 2007 & 2008 American Community Surveys)

<b>Columbia County - At a Glance</b>	
Population	110,627
Median Age	35.2
Age 65 & Older	10,683
Population with health insurance	87%
Median Household Income	\$64,462
Median Home Value (Owner-Occupied)	\$171,100
Unemployment Rate	3.7%

## Local Physician Population

Augusta is home to the Medical College of Georgia (MCG), a member of the public University System of Georgia. More physicians graduate from MCG each year than any other medical school in the state’s university system. Between the school years ending in 2001 and 2007, an average of 164 physicians a year graduated from MCG.

**Chart 3** (Sources: The Integrated and Postsecondary Education Data System; University System of Georgia)

Doctor of Medicine Degrees Conferred at Georgia Institutions							
	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007
Medical College of Georgia (MCG)	170	169	173	158	143	153	183
Emory University	110	103	110	107	103	110	110
Mercer University	52	48	52	42	54	54	64
Morehouse School of Medicine	30	35	35	39	44	38	46

**Chart 4** (Sources: Georgia Board for Physician Workforce; American Medical Association Directory of Physicians in the U.S; Association of American Medical Colleges, 2008)

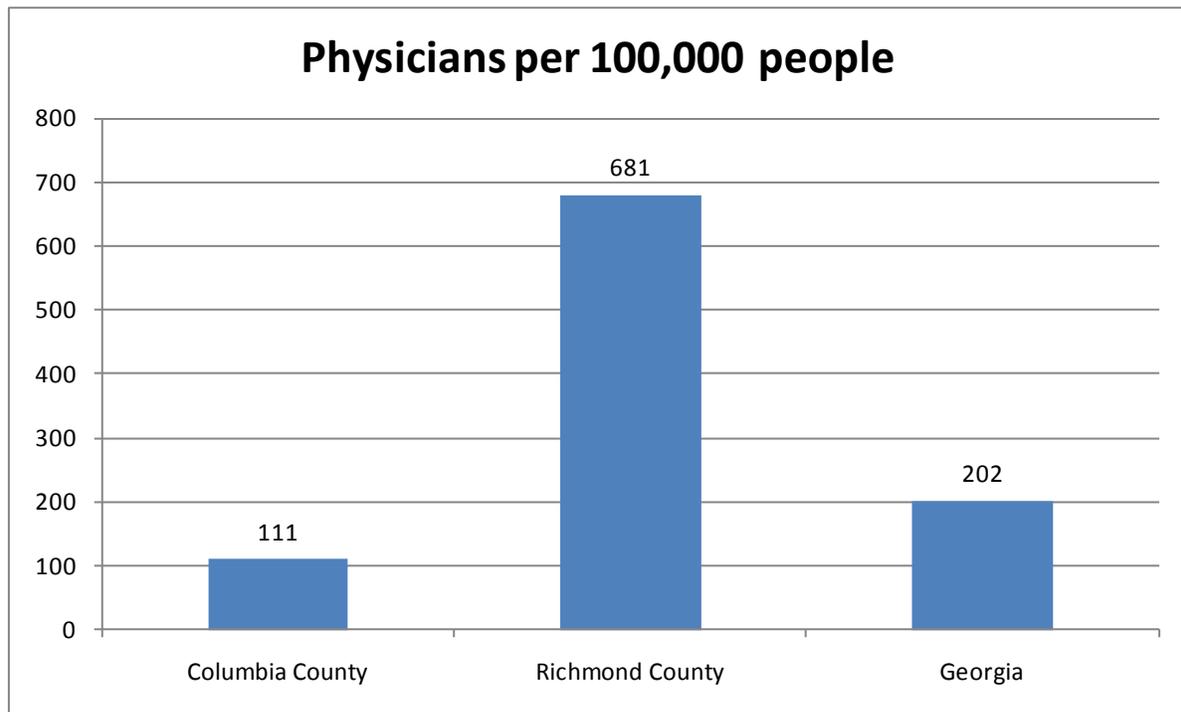
Physician Retention by Medical School in Georgia		
	Location	% of M.D. Graduates Practicing in GA
Mercer University	Macon	60.1%
Medical College of Georgia (MCG)	Augusta	52.5%
Morehouse School of Medicine	Atlanta	44.9%
Emory University	Atlanta	37.6%

Physicians who graduate from MCG also establish local practices—about 50% practice in the state of Georgia upon graduation.



Due to the considerable number of new physicians graduating from MCG and the high physician retention rate, the Augusta area boasts a large population of doctors. Richmond County, home of MCG, has a per capita rate of physicians over three times that of Georgia, creating a significant demand for medical office space. However, Columbia County's market potential is still untapped. With a physician rate only half of the statewide average, it would appear the local market is severely underserved. As of 2006, only 116 doctors practice medicine in Columbia County.

**Chart 5** (Source: Composite State Board of Medical Examiners, Georgia Physician Survey, 2006; U.S. Census Bureau)



Based upon national standards for doctors required per capita, the Georgia Board for Physician Workforce projects significant deficiencies in the following specialties for Columbia County in the year 2010: anesthesiology, internal medicine, OB/GYN, and psychiatry. In Richmond County, the board forecasts a surplus for all of the aforementioned specialties in 2010.

Since the 1970s, the general population has increasingly migrated out of Richmond County into Columbia County. Market demand for services follows population growth. The Richmond County medical market is so oversaturated with doctors, one would expect the eventual migration of those physicians into Columbia County, provided adequate office space is available.

## Existing Medical Facilities

Although Columbia County is not home to any full-service hospitals, rapid population growth is going to necessitate such a facility in the near future. Currently, residents must drive between 20 to 30 minutes from the most populated area of Columbia County to reach the closest hospitals, located in Richmond County. Two facilities in Columbia County provide emergency services. Two medical office developments, on North Belair Road and Columbia Road, are also located in the county.

**Chart 6** (Source: Columbia County Planning & Engineering Department)

Columbia County - Existing Medical Facilities		
Name	Address	Services
Martinez Urgent Care	210 Bobby Jones Expy # A	Emergency
Prompt Care Occupational Medicine	447 N Belair Rd # 101	Emergency
University Health Care - Evans Campus	447 N Belair Rd	Surgery Center of Columbia County Sleep Center Prompt Care Occupational Medicine Services Four Professional Centers Imaging Center Speech and Hearing Center More than 20 private practice physician groups.
University Hospital Medical Center-Columbia County	4106 Columbia Rd	Skilled nurses Home health aides Physical therapists Occupational therapists Speech therapists Medical social workers

The University Health Care facility is the only large medical office development in Columbia County. It covers over 60 acres on North Belair Road and includes office space for many private practices.



## Potential Medical Office Sites

Columbia County's Planning and Engineering staff has identified a number of sites suitable for medical office development, ranging in size from one to 10 acres. The listed locations have access to major roads and are located in the county's most populated areas. Additionally, all the sites are either vacant or underused. The list is by no means comprehensive, and county staff is available to provide details about additional sites.

**Chart 7** (Source: Columbia County Planning & Engineering Department, 2009)

Potential Medical Office Sites in Columbia County				
Address	Acres	Zoning	Notes	Owner
Washington & Old Washington Rds	49	PUD: Offices are permitted.	Riverwood Plantation mixed-use development.	Pollard Land Company, Inc
7008-7010 Evans Town Center Blvd.	2.86	C-2: Offices are permitted.	Overlooks new county park. Next to Security Federal Bank.	VCP South, LLC
680 Industrial Park Drive	52	PUD: Offices are permitted.	Marshall Square development.	Marshall Square, LLC
648 N Belair Road	1.68	C-2: Offices are permitted.	Huddle House property across from Lowe's.	Rachel Robertson
4381 Evans to Locks Rd	1	C-2: Offices are permitted.	Across from Evans Plaza (Omni Fitness). Corner lot.	Snuggs Properties
300 S Belair Rd	15	C-1: Offices are permitted.	Close to Interstate 20 on-ramp.	Warr Family Limited Partnership
N Belair Rd & Village Square Dr	1.5	PUD: Offices are permitted.	Near University Health and retirement communities.	Barbara Utermark
N Belair Rd & Village Square Dr	1.6	PUD: Offices are permitted.	Near University Health and retirement communities.	Samuel D'arco
3964 Evans to Locks Rd	10.74	R-2; Offices are not permitted, but zoning could be changed	Retirement home possible across the street.	Sandra Williams
4627 Columbia Rd	10	R-2; Offices are not permitted, but zoning could be changed	Across the street from Wymberly retirement community.	Jeff Bryant
next to 4627 Columbia Rd (no address)	31.35	R-2; Offices are not permitted, but zoning could be changed	Across the street from Wymberly retirement community.	Judith Jennings
4269 Washington Rd	3.68	C-2: Offices are permitted.	Next to Mullins Crossing shopping center. Across the street from Brandon Wilde retirement community.	Georgia Bank & Trust

## Conclusion

The underserved medical market in Columbia County presents a unique development opportunity. County staff is available to help identify sites, measure market demand, provide demographic data and facilitate the development of medical offices.

For more information please contact:

Columbia County Planning & Engineering Department  
630 Ronald Reagan Drive, Building A  
PO Box 498  
Evans, GA 30809  
Phone: (706)868-3400  
Fax: (706)868-3405  
Email: [planning@columbiacountyga.gov](mailto:planning@columbiacountyga.gov)  
Online: [www.columbiacountyga.gov](http://www.columbiacountyga.gov)