



Housing the Workforce: *A Regional Call to Action*

Aiken-Augusta Regional Housing Study

Summary Edition
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A Production of:



KB | ADVISORY GROUP

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Acknowledgments

This summary, and the full SRSCRO Regional Housing Study it draws from, would not have been possible without the insight and generosity of local contributors from across the eight-county Augusta–Aiken region. City and county officials, real estate professionals, and business leaders all shared their time, data, and perspectives to help shape a clear understanding of the region’s housing dynamics.

More than 1,000 residents and workers also responded to the study’s regional housing survey, offering firsthand perspectives that grounded our analysis in the lived experiences of those who call the Augusta–Aiken region home.

To everyone who contributed, and to those now reading and using this report, thank you. Our hope is that these findings will inform decisions, spark collaboration, and help create housing opportunities that strengthen the region’s economy and improve the quality of life for all who live and work here.



Purpose of This Summary

The Savannah River Site Community Reuse Organization (SRSCRO) engaged KB Advisory Group to prepare a Regional Housing Study for the eight-county Augusta–Aiken region. This summary distills the most urgent findings and recommendations from the full, in-depth report, which is available separately for those seeking detailed data, methodology, and county-by-county analysis.

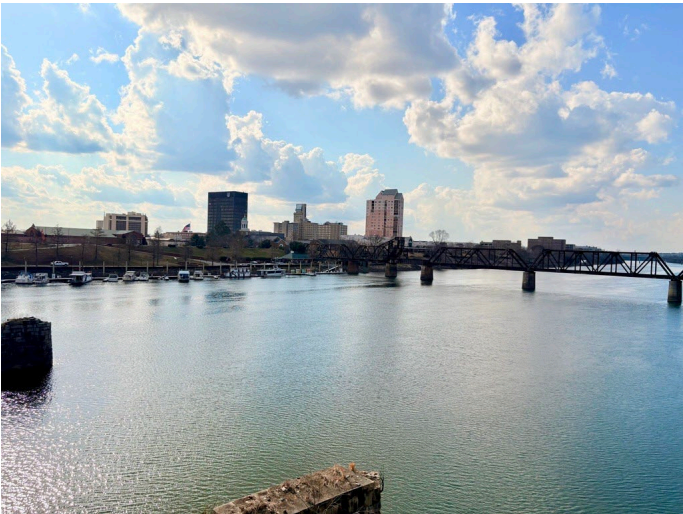
The purpose of this summary is to give leaders, elected officials, developers, and other stakeholders a concise but complete understanding of the region’s housing challenges and opportunities and to frame a clear path forward.

The Augusta–Aiken region, for the purposes of this study, includes:

Georgia:
Burke, Columbia, McDuffie, Richmond

South Carolina:
Aiken, Allendale, Barnwell, Edgefield

Each county has unique housing market conditions, but the region functions as one interconnected economy and labor market. Housing policy decisions in one county ripple quickly across the others.



A Regional Call to Action

The Region’s Housing Gap is Growing

This is a region in transition. Some places are absorbing growth, others are losing population and their vitality. But all counties face the same challenge:

How to provide housing that meets market demand, without compromising character or long-term fiscal health.

Over the next five years, the Augusta–Aiken region will require

17,000 new housing units

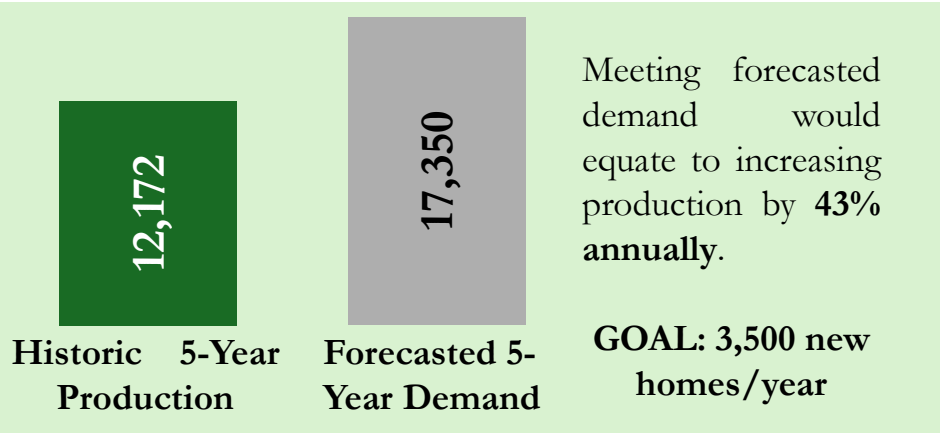
to meet projected demand. This would represent a

43% increase

over the pace of recent production.

Without it, the region faces a shortfall of

more than 5,000 homes.



Fiscal Impacts of Housing

\$48.4 Million

Total 5-Year Fiscal Benefit of meeting forecasted demand

Over the next five years the region’s counties stand to gain nearly \$50 million in property tax revenues from delivering more housing to satisfy market demand.

This fiscal impact would not be realized if the region’s counties continue to deliver at historic rates.

How to Use This Summary

This summary is intended as a quick-reference companion to the full Regional Housing Study. It condenses key data, analysis, and recommendations into a format that can be shared in public meetings, incorporated into planning discussions, and used to brief stakeholders. For detailed data tables, methodology, and in-depth county-level findings, readers should consult the complete report.



Why This Matters Now: A Regional Call to Action

The Region's Housing Gap is Growing

A Growing Economy and Shifting Preferences Drive Demand

Major Economic Growth

More than **14,000 jobs** have been added over the past five years, with another **16,000 projected by 2030**, led by expansions at Fort Gordon, the Savannah River Site, and new industrial facilities.

In-Migration

A steady influx of new residents from across the Southeast, drawn by employment opportunities and relative affordability.

Changing Household Dynamics

Smaller household sizes and an aging housing stock require more units even without population growth. Increasing demand persists for rental units and entry-level for-sale housing.

But Lack of Production Leaves a Mismatch in Supply

In the past decade, the region added **24,000 new homes**, yet the mix of **prices, housing types, and locations** is misaligned with current demand.

For-sale market

Limited availability in the **\$100,000–\$400,000** range constrains homeownership for first time buyers and middle-income households.

Rental market

Most new apartments lease for **\$1,000–\$2,000/month**, while the largest unmet demand is under **\$1,000/month**.

Geographic imbalance

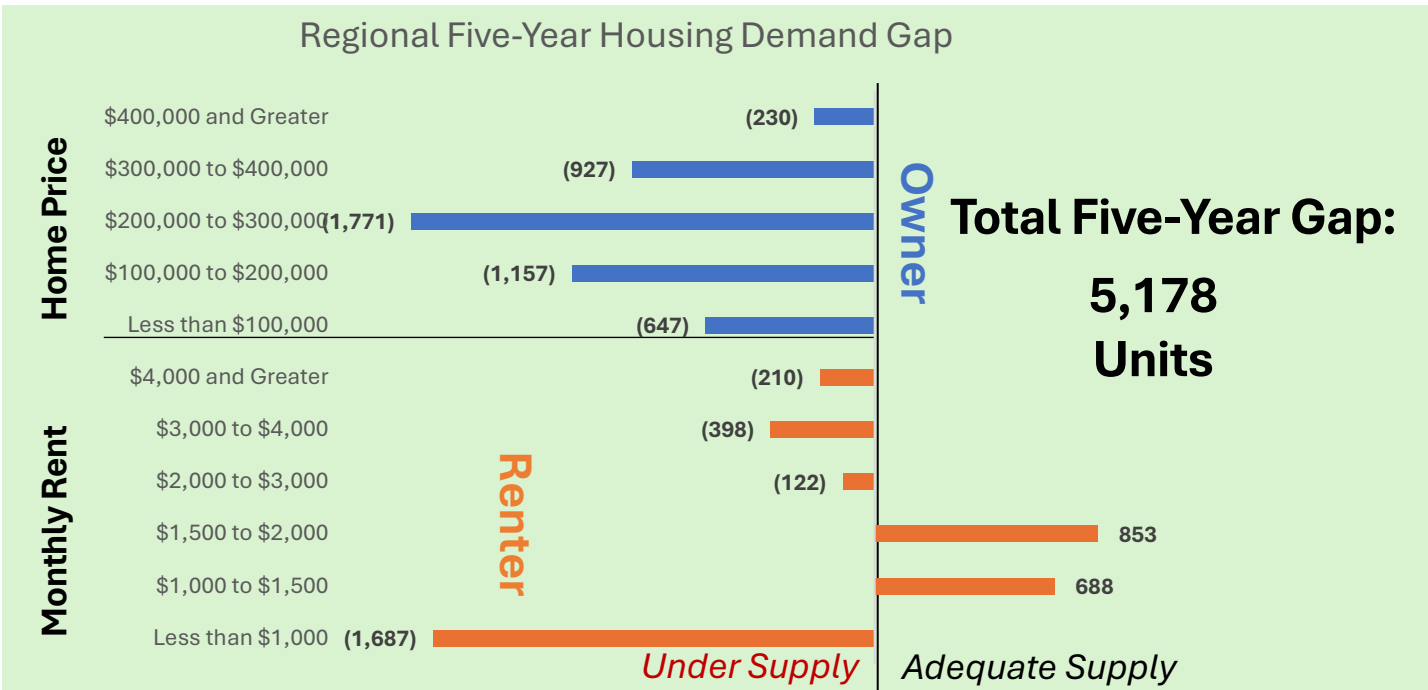
New housing is concentrated in Aiken, Columbia, and Richmond counties, even as job growth and commuting patterns extend across the region.

The Cost of Falling Behind

Housing is no longer just a local concern.
Housing is now a regional competitiveness issue.

The Augusta–Aiken region functions as one economy and one labor market. Without coordinated action across all eight counties, the housing gap will widen and the entire region will bear the consequences.

- If the region fails to address its housing gap:
- Housing costs will rise, eroding affordability for residents and employers.
 - Commutes will lengthen, adding strain to infrastructure.
 - Workforce stability will decline, making it harder to recruit and retain talent.
 - Employers may redirect future growth to competing regions.
 - Fiscal health of cities and counties will deteriorate.



Within the for-sale market, while historic deliveries have been focused in the \$100,000 to \$400,000 range, escalating production costs make it increasingly difficult to deliver traditional new single-family homes at these prices, meaning that demand for these homes far outstrips market supply, resulting in deep supply gaps. These gaps are most pronounced in Columbia County.

While there have been a significant number of new deliveries over the last five years within the rental home segment between \$1,000 to \$2,000, these deliveries have not addressed demand at the lowest end of the rental spectrum, resulting in a deep gap in new units available at price points under \$1,000.

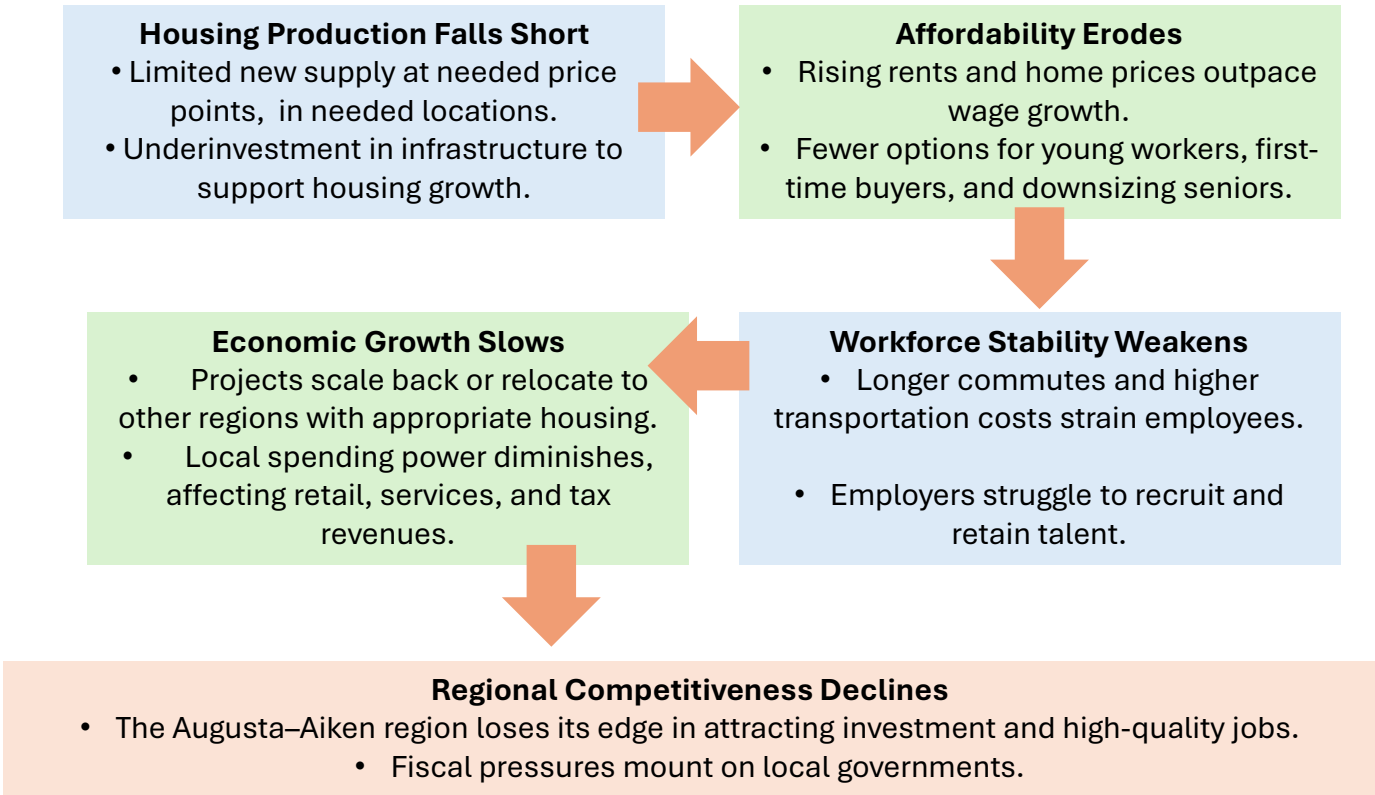
The “surplus” of units in the \$1,000 to \$2,000 range both reflects market price concentration and obscures the spatial concentration of these units, most of which are expected to be delivered in Richmond County

The Cost of Falling Behind

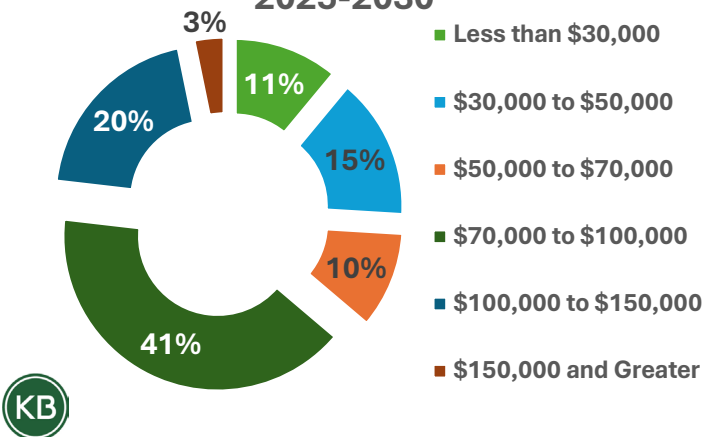
Housing is a foundational part of the region’s economy

Delaying coordinated action
does not keep things “as they are,” rather it
accelerates decline in affordability, livability, and competitiveness.

Cause-and-Effect Chain



Distribution of Forecasted Housing Demand by Household Income, 2025-2030



Demand Segmentation: Housing for Whom?

In the next five years, the Aiken-Augusta Region needs 17,000 new homes that are located in the right place at the right price.

The region’s workers are a diverse group, with a variety of preferences and income constraints, meaning that new housing and the strategies used to achieve delivery goals must aim to expand housing opportunities not just at the upper ends of the housing market but across all segments, with particular attention on middle-income earners.

The Opportunity Ahead

A Region Poised for Well-Managed Housing Growth

The Augusta–Aiken region already has the ingredients for a thriving, balanced housing market:

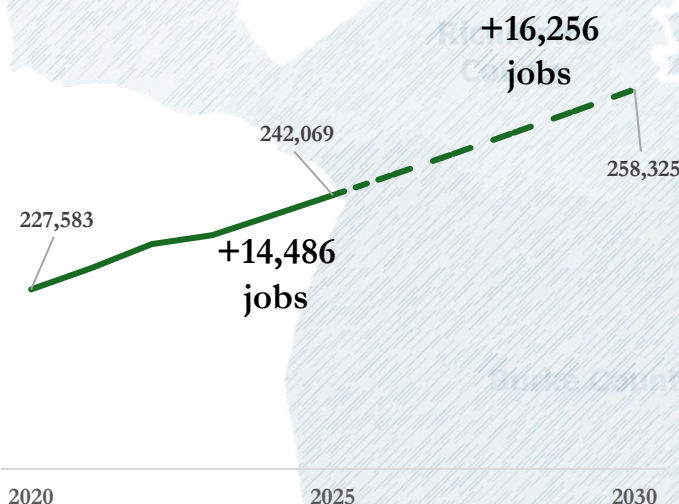
A strong and diverse economic base anchored by Fort Gordon, the Savannah River Site, advanced manufacturing, healthcare, and education.

Proven ability to attract new residents from across the Southeast and beyond.

Available land and redevelopment opportunities that can support a range of housing types.



Historic and Projected Regional Employment, 2020 - 2030



Regional Employment Growth

Since 2020, the Aiken-Augusta Region has added more than 14,000 jobs, propelled by strong economic development wins in addition to macro-level trends.

Over the next five years, the region is expected to add even more jobs than it has over the last five, with much of this growth connected to projected growth at the Savannah River Site and Fort Gordon in addition to new industrial investments in the region.

The region can enhance growth opportunities by focusing not just on adding more housing, but on supporting all eight counties in delivering the right types of homes to meet the untapped demand in their local markets.

The Payoff

If the region meets the housing challenge head-on:

- Employers can better recruit and retain the talent they need.
- Residents can find housing they can afford near jobs, schools, and amenities.
- Local governments benefit from a stronger tax base and reduced fiscal stress.
- The Augusta–Aiken region strengthens its position as a premier location for business and quality of life.

Regional Snapshot

Key Data Takeaways

Population & Jobs

~630,000 residents across eight counties
Growth: Added approximately 38,000 residents over the past decade, faster than many peer regions.
Jobs: Over **24,000 net new jobs** in the past 10 years, driven by defense, manufacturing, healthcare, and logistics.
Outlook: Employment growth projected to continue at 1.5–2% annually through 2030, fueled by industrial expansions and in-migration.

Shortage of housing near major job centers forces longer commutes, raising transportation costs and reducing quality of life.

Housing Stock & Production

~270,000 housing units regionwide
Growth: Avg. of 2,400/year, but uneven across counties and product types.
Current Gap: Projected shortfall of 5,000+ units if production trends hold.

Affordability & Access

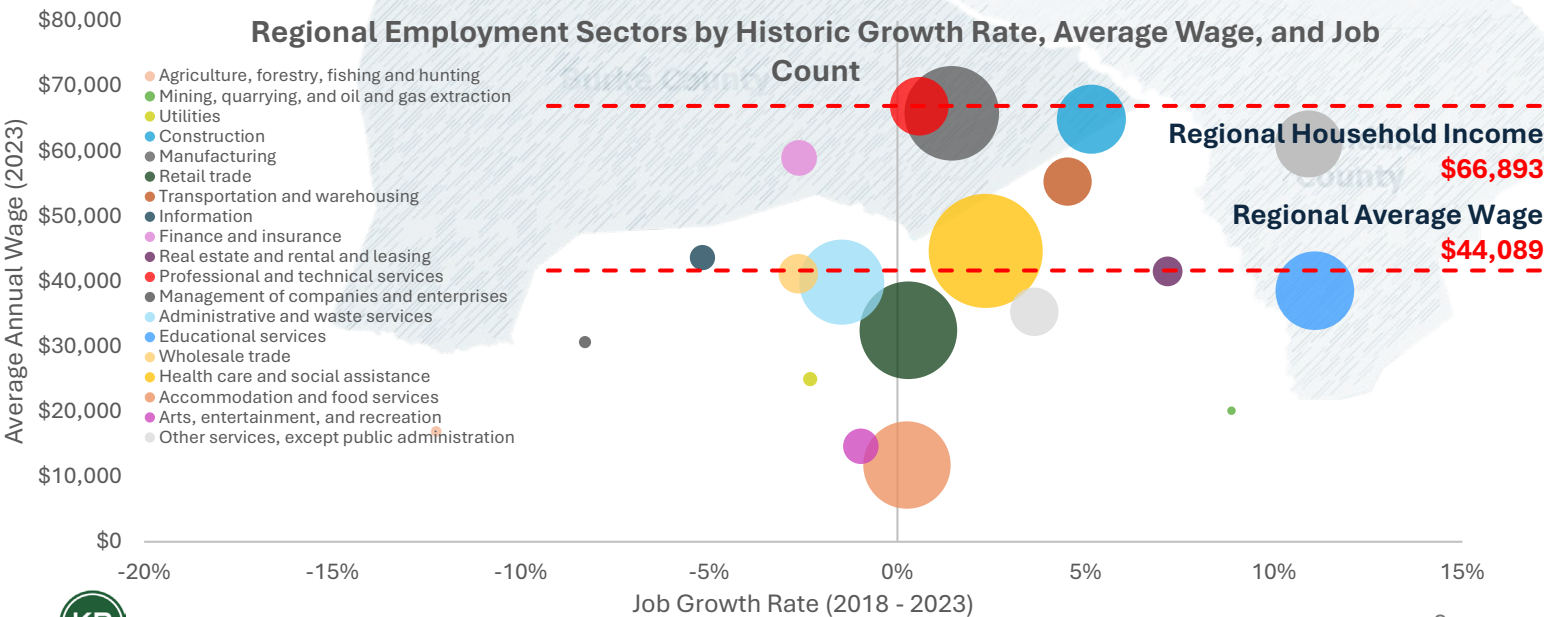
Median Home Price: Up ~45% in the past 5 years to above \$240,000.
Median Rent: Up ~30% now averaging \$1,150/month.
Cost-burdened: More than 1 in 4 households spend over 30% of income on housing.

Employment by Sector

The top five industries by proportion of the local job market are Health care and social assistance, Retail trade, Manufacturing, Accommodation and food services, and Administrative and waste services.

Health care and Manufacturing saw 12% and 7% increases in total employment over the five-year period, reflecting a growing need for services for the region’s growing population.

An active group of economic developers have expanded the region’s industrial base in recent years by attracting companies like Arubis, Shaw Industries, and Generac to the region.



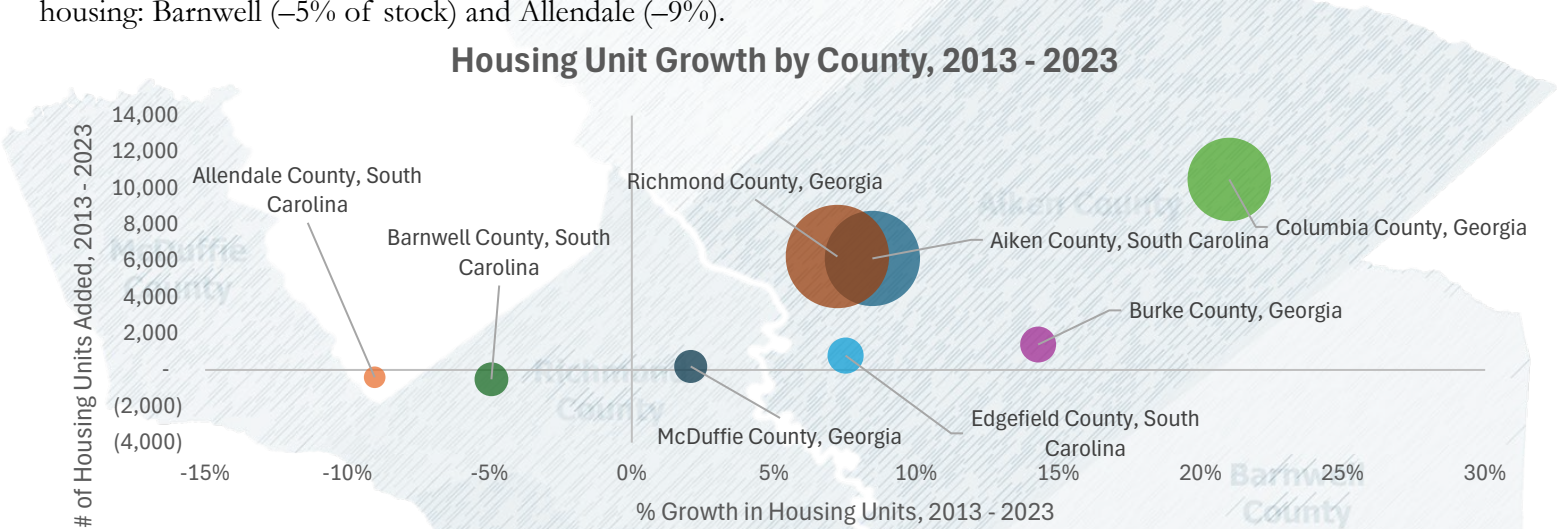
Steady Household Growth

But with Uneven Gains and Shifting Demographics

Since 2013, the Aiken-Augusta region has experienced steady household growth, though the pace has varied widely across its eight counties.

The region’s new housing is overwhelmingly built in three counties. Columbia (+10,486 units), Richmond (+6,245), and Aiken (+6,138) captured almost all production. Elsewhere, gains were small: Edgefield (+791, largely north of I-20 Exit 5) and McDuffie (+192). Two counties lost housing: Barnwell (–5% of stock) and Allendale (–9%).

Housing Unit Growth by County, 2013 - 2023



Age and Income

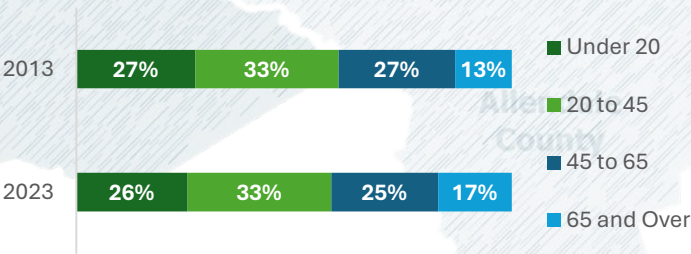
Every county saw its 65+ population grow, accompanied by a proportionate decline in residents under 20. The working-age population (20–65) held steady, but the shrinking youth cohort could have long-term consequences for school enrollment, workforce replenishment, and economic vitality.

All counties saw fewer households earning under \$35,000 annually. Columbia, Aiken, and Edgefield Counties experienced notable growth in higher-income households, reflecting where much of the region’s employment and household growth has been concentrated.

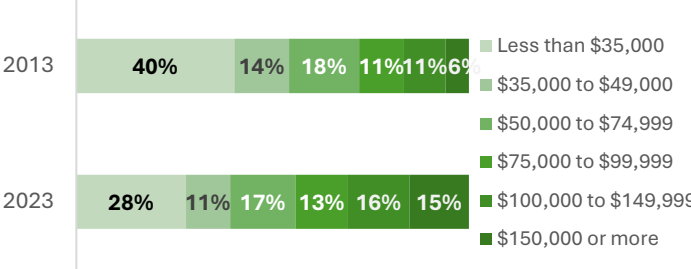
If this trend continues to play out in the years to come, there may be heightened demand for eldercare services and facilities and falling enrollment in schools within the region.

A lack of young residents in the region can also have negative effects on the region’s workforce in the long-term, with decreasing rates of replacement of workers as they age out of the workforce.

Regional Population Age Distribution, 2013 - 2023



Regional Household Income Distribution, 2013 - 2023



Source: American Community Survey, 2010, 2023, KB Advisory Group

Where the Housing Went, and Why It Matters

Growth is concentrated, owner-heavy, and fragile in key places

3 KEY TAKEAWAYS about today's housing supply

1) Concentration raises prices and pressure in the growth counties and leaves others struggling to retain residents.

Implication:
Prices and commute times will rise fastest in the three growth counties.

2) We built for owners while renters back-filled older single-family stock.

Implication:
Renter households important to the workforce compete for aging single-family stock, impacting established neighborhoods. Renters lack quality unit and location options.

3) Loss of stock in some counties signals structural risk.

Where units are disappearing, so are options for workers and seniors. Losing stock erodes the tax base, weakens downtowns, and makes employer recruitment harder. Production in a few counties is not enough to offset decline elsewhere.

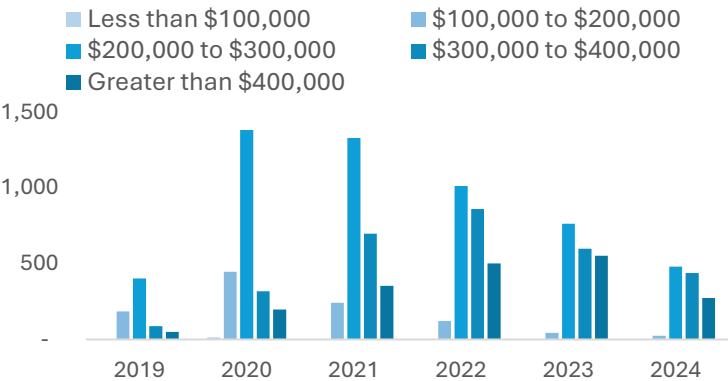
Implication:
Counties with losses face a shrinking workforce and weaker fiscal outlook.

Inventory Growth by Tenure and Price Point

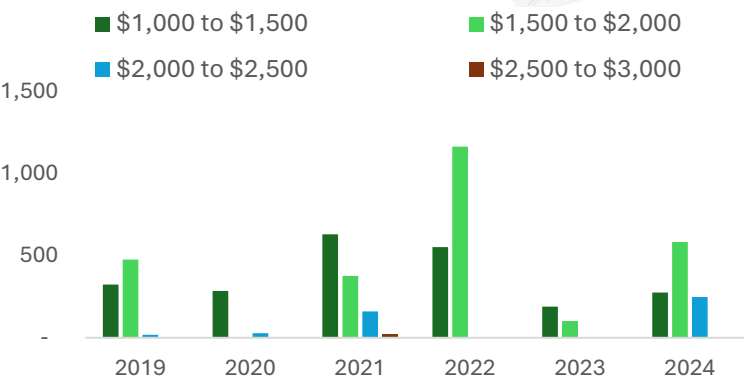
From 2019–2024, about 68 percent of deliveries were for-sale; and 32 percent were multifamily rentals. The region's tenure split is also about 68/32, but **most renters live in single-family homes rather than apartments.**

This pattern limits attainable rentals, especially at the sub-\$1,000 level, and scatters rental choices far from job centers.

Regional New Construction Closings by Sale Price and Volume, 2019 - 2024



Regional New Construction Multifamily by Rental Price and Volume, 2019 - 2024



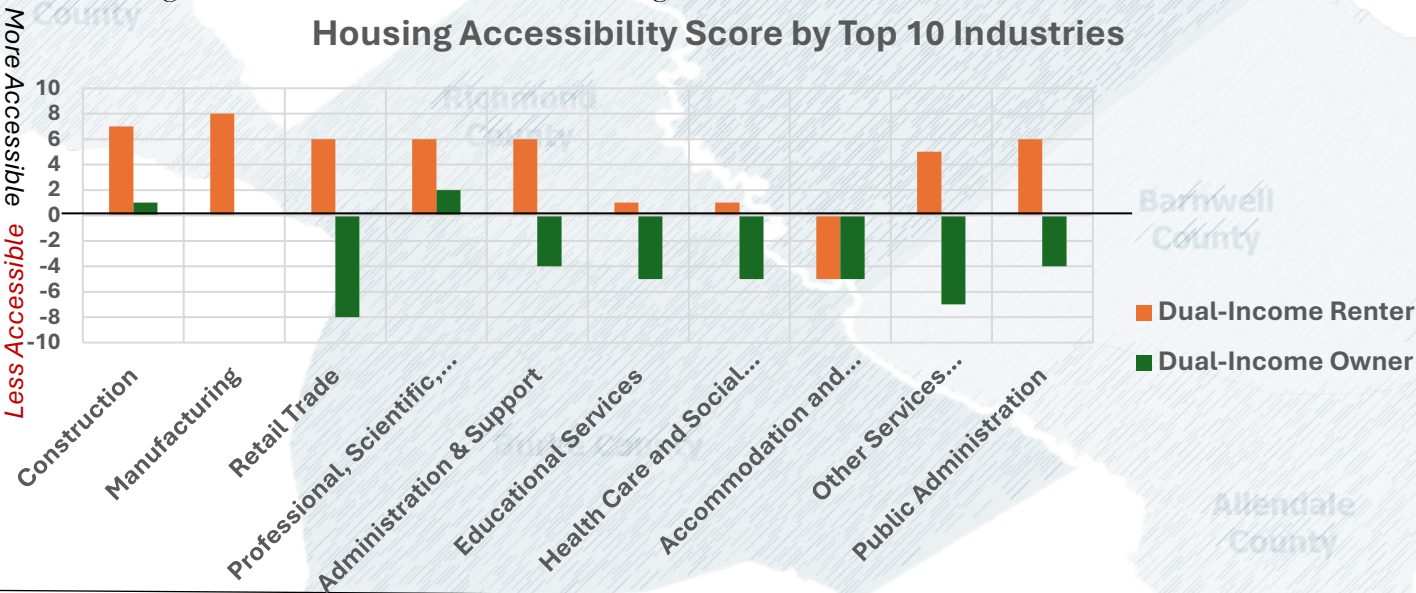
Who Can Afford to Live Near Work & Why It Matters

Owner-heavy housing delivery and concentrated supply in just three counties puts the squeeze on workers across the region

Housing accessibility in the context of this analysis is defined as the ability to afford the median rental or for-sale opportunity within the county in which a given worker is employed without exceeding 30% of their monthly income.

Generally, dual-income households struggle to access appropriately priced for-sale options within the counties in which they are employed in all industries except those employed in construction; manufacturing,; and professional, scientific and technical services. The housing accessibility outlook is much worse for single-income households.

For the region’s top 10 industries, which collectively represent roughly 90% of the region’s jobs, most dual income households are able to afford the average rental home within the county they are employed, however lower-wage workers face significant barriers across much of the region.

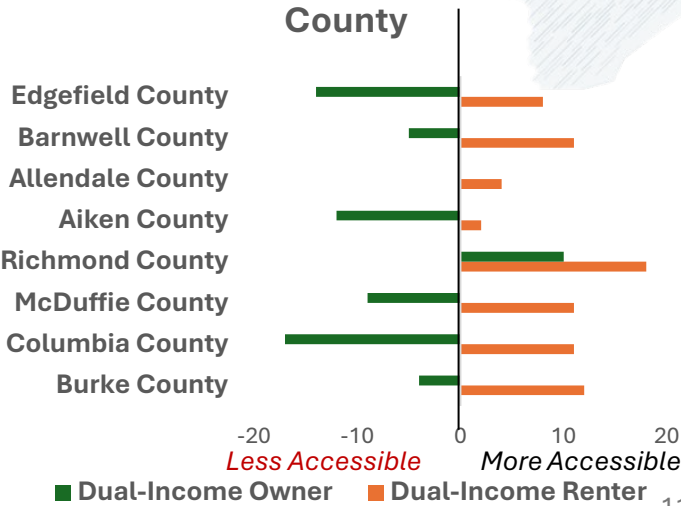


Housing Accessibility by County

While most workers in the region can access local rental options without becoming cost-burdened, there are significant price barriers for households seeking to buy homes within the communities in which they work.

These pressures are most significant in Columbia and Aiken, but also in Edgefield and McDuffie, which have experienced growth pressures in recent years, exerting upward pressure on home prices. Augusta-Richmond scores the best for accessibility because of the strong economic base it provides for the region and its wider variety of housing types options.

Housing Accessibility Scores by County



Survey Results

Work location impacts housing choices, but often choices are limited

Work opportunities remain the primary factor shaping where people choose to live in the greater Aiken-Augusta area.

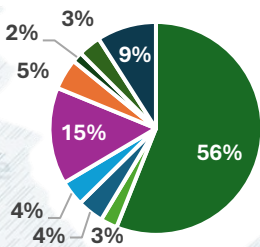
The most frequent reason that survey respondents queried in Fall 2024 provided for why they lived where they lived was their employment, followed by family ties and the type of housing available.

While many of the survey respondents belonged to higher-income households, housing costs were identified as a leading barrier to living in the community or location that they would most prefer to live.

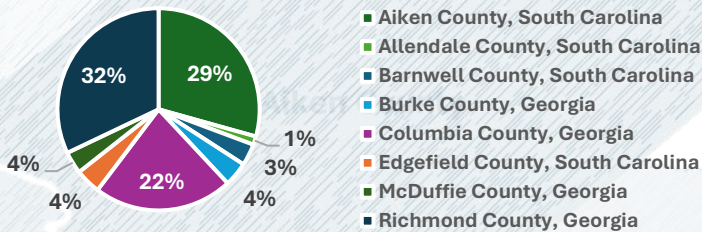
Interestingly, a lack of amenities was the second most frequent response to this question, possibly reflecting a desire to live closer to work or family, but the lack of community amenities makes the proposition undesirable.

The stakes: Local economies rely on workers being close to their jobs. If they can't: turnover rises, commutes lengthen, and service delivery suffers.

Respondents by Place of Residence

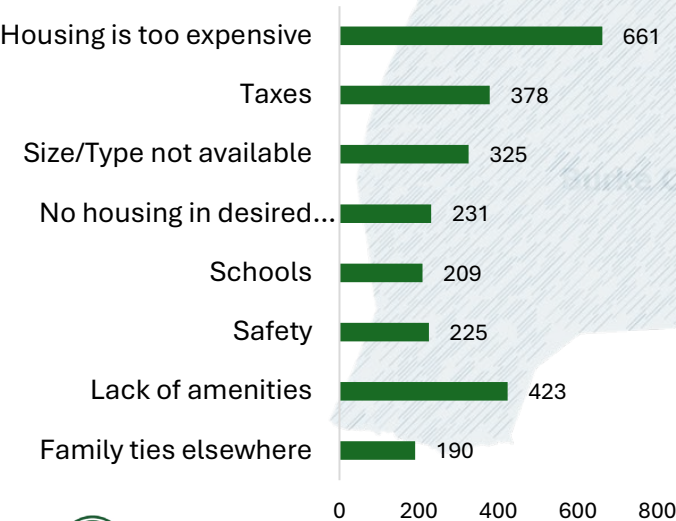


Distribution of Regional Households by County, 2023

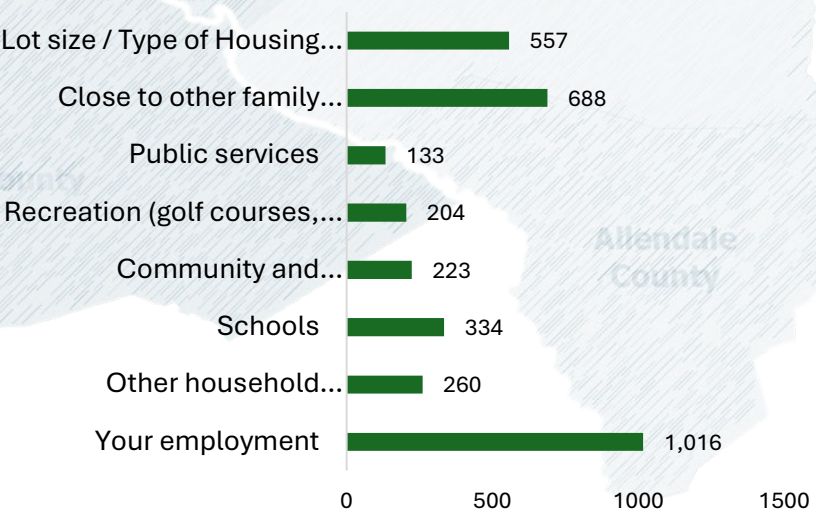


The distribution of survey respondents by home county somewhat differs from the actual spatial distribution of the region's households, with far more survey respondents residing within Aiken County.

Obstacles to Choosing Where to Live



Reasons for Living Where They Do



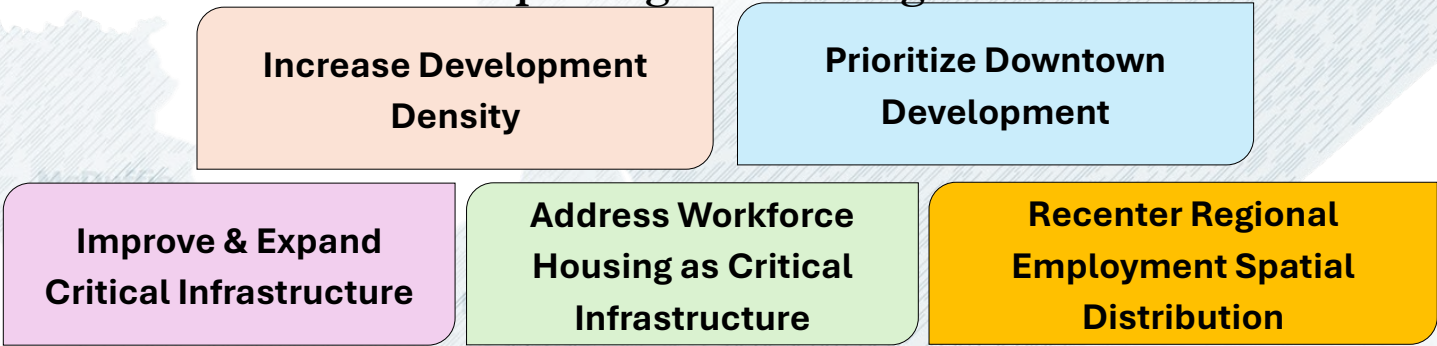
Regional Implementation

Goals & Strategies

The goal of delivering nearly **3,500 new housing units within the region annually over the next five years** will mean **increasing annual production by 43%**.

In order to continue to enhance the local economy and enrich residents’ quality of life; this analysis determines that each community within the region should agree to deliver their fair share of housing units required to absorb the region’s projected growth.

Top 5 Regional Strategies



Meeting the challenge represents a careful balancing act that will allow the region to absorb growth and allow for a sustainable future while also maintaining the aspects that are core to each community’s conception of identity.

What Balance Looks Like

Regional success will require counties to:

- Grow without losing what makes them unique
- Build where infrastructure already exists
- Diversify housing types and price points
- Support infill and rehabilitation in historic cores
- Align public action with private development

The Opportunity Ahead

- Columbia** must leverage historic successes to strategize for tomorrow.
- Richmond** must turn jobs into residents.
- McDuffie, Burke, & Edgefield** must prepare to absorb growth through the improvement of local infrastructure and services.
- Allendale & Barnwell** can stabilize by prioritizing infrastructure improvements and smart infill.
- Aiken** must build on momentum with more diversity of housing types.

The region needs smarter, more balanced growth.

Every county and city has a role to play.

Regional Implementation

Regional Character Areas

A) Urban Core

Counties: Richmond

Characterized By: Enduring economic and population center for the eight-county region, most intensely developed county in the region home to the most residents.

Strengths: High number of high-quality employment opportunities, historic charm, robust physical and organizational infrastructure.

Weaknesses: Negative regional perceptions about school system and safety, aging housing inventory.

B) Suburban Core

Counties: Columbia and Aiken

Characterized By: Historically thought of as bedroom communities for Augusta-Richmond with largely single-family detached homes and auto-centric retail and office options, high residential growth.

Strengths: High-quality amenities and services, interstate adjacent, extensive road, water and sewer infrastructure, newer housing inventory.

Weaknesses: Lack of housing diversity, unsustainable development patterns, policies that constrict production.

C) Exurban

Counties: McDuffie and Edgefield

Characterized By: Historically rural, slowly but actively transitioning towards being more developed.

Strengths: Interstate adjacent, fewer regulations around development, strong historic downtown areas.

Weaknesses: Lack of infrastructure, lack of community support for increased residential growth.

D) Emerging Rural

Counties: Burke

Characterized By: Historically rural with few signs of active transition towards being more developed, key assets that present opportunities for future development.

Strengths: Strong historic downtown area, fewer regulations around development, Plant Vogtle.

Weaknesses: Lack of water and sewer infrastructure, no interstate access, lack of community support for residential growth.

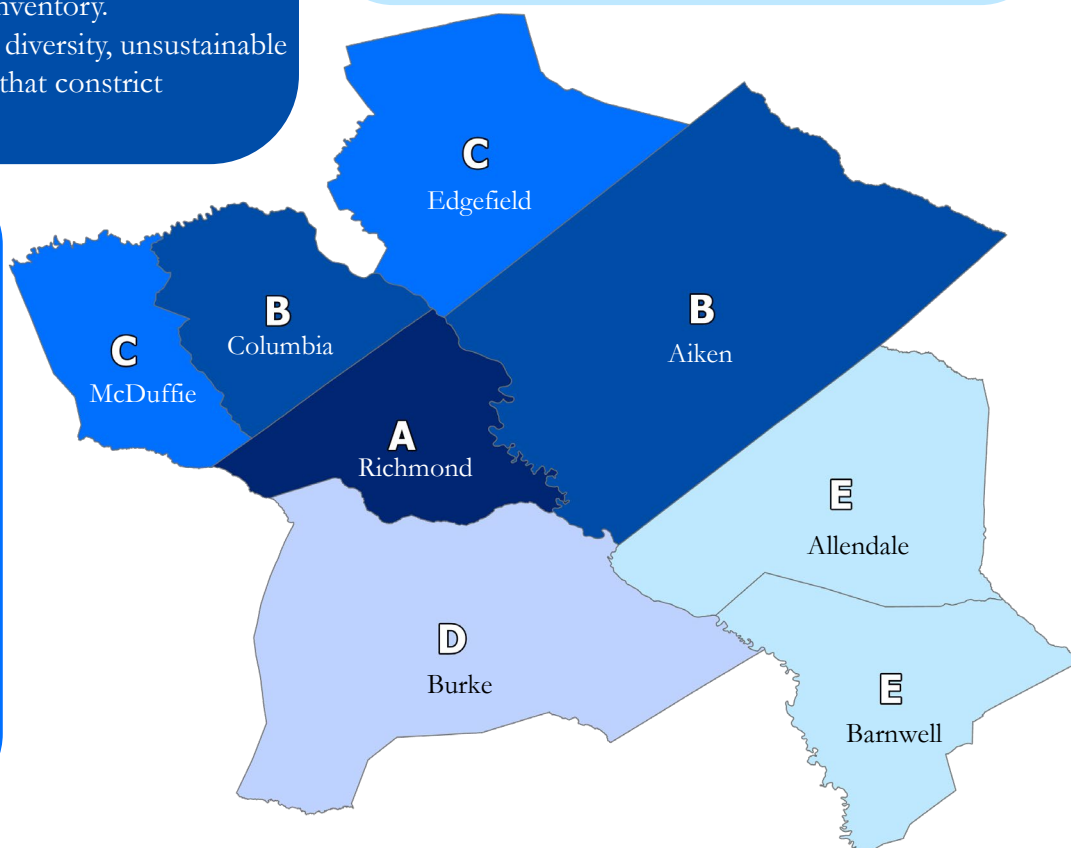
E) Peripheral Rural

Counties: Allendale and Barnwell

Characterized By: Historically rural, lack of community resources, services and amenities.

Strengths: Fewer regulations around development, historic downtown areas.

Weaknesses: Lack of infrastructure, lack of high-quality connections to other parts of the region, low organizational capacity.



Regional Implementation

Goals & Strategies

The goal of delivering nearly 3,500 new housing units annually within the region over the next five years, which will mean increasing annual production by 43%, will be a challenge. In order to achieve this goal, the region’s counties and the communities within them will need to implement a variety of strategies to deliver the housing units required to absorb the region’s projected employment growth without experiencing market dysfunction.

These strategies, broadly stated, include:

Increase Development Density

Counties and the incorporated communities within that allow higher development densities will unlock a “low-to-no cost” tool that can help to diversify housing inventory, increase housing production, and improve housing affordability, all of which are central to managing the region’s growth pressures.

1

Prioritize Downtown Development

To preserve rural and natural lands, land use decisions regarding increased housing must be planned carefully relative to existing infrastructure and a desire for more diverse retail and cultural experiences. Prioritizing housing development in the region’s established downtowns can advance all of these goals through the integration of small-lot single-family, townhome and multifamily units.

2

Improve & Expand Critical Infrastructure

Many of the counties within the region face significant infrastructure limitations impacting capacity for new housing production. While roads and high-speed internet are two examples, the lack of water and sewer infrastructure represents the most significant limitation. Investing in the improvement of this infrastructure is a necessary prerequisite to tackling housing and economic development questions in many of the region’s communities.

3

Address Workforce Housing as Critical Infrastructure

There are instances in which the market will need additional funds and resources to meet the region’s housing demand, particularly on the lower end of the market. Creating the appropriate opportunities for direct public contributions towards housing production will be crucial if the region hopes to maintain a stable workforce.

4

Recenter Regional High-Wage Employment

Presently, the region’s jobs are highly concentrated within Richmond County and to a lesser degree Aiken and Columbia. Economic development efforts that aim to create greater spatial diversity for high-wage jobs in the region will help the region’s counties to retain residents and redistribute housing demand in the region, taking pressures off more central communities.

5

Regional Implementation

Increase Development Density

Agents of Action:

Counties, Cities & Regional Entities

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes, and accessory dwelling units (ADUs).
2. Develop and adopt a residential “Pre-Approval Catalog”

1

Intermediate (1 Year – 3 Years)

1. Rezone or create overlays to allow for higher-density residential development near job centers, along commercial corridors and where existing infrastructure is already sufficient to support higher densities.
2. Reduce parking minimums while also increasing transportation alternatives.
3. Create incentive tools, such as Tax Allocation Districts/Tax Increment Financing districts to support commercial redevelopment and infill projects that create housing units.
4. Create a program aimed at supporting small-scale developers.

Priority

Aiken

Allendale

Barnwell

Burke

Columbia

Edgefield

McDuffie

Richmond

High

Low

Low

Mid

High

Mid

Mid

High

Prioritize Downtown Development

Agents of Action:

Cities & DDAs

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Form a Downtown Development Authority OR empower existing DDA with greater resources and technical support.
2. Promote safety and attractiveness in downtown through events programming.

2

Intermediate (1 Year – 3 Years)

1. Create a façade grant program to improve the appearance and perception of downtown, to support business activity and property value growth and to encourage downtown housing development.
2. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.

Priority

Aiken

Allendale

Barnwell

Burke

Columbia

Edgefield

McDuffie

Richmond

High

Mid

Mid

High

Mid

High

High

High

Regional Implementation

Improve & Expand Critical Infrastructure

Agents of Action:

Counties & Cities

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion

3

Intermediate (1 Year – 3 Years)

1. Generate consistent local revenue to support investments in transportation, water and sewer projects through the creation of special tax districts like TADs/TIFs, SSDs and CIDs

Priority

Aiken

Allendale

Barnwell

Burke

Columbia

Edgefield

McDuffie

Richmond

Mid

High

High

High

Low

High

High

Mid

Address Workforce Housing as Critical Infrastructure

Agents of Action:

Counties, Cities & Regional Entities

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.
2. Establish a land bank or leverage existing land bank to convert abandoned and tax-delinquent properties into housing and community assets.

4

Intermediate (1 Year – 3 Years)

1. Support the production of affordable housing through flexible, locally controlled funding through the creation of a housing trust fund.*
2. Ensure that a share of new housing in high-demand areas is affordable to local workers by adopting inclusionary zoning overlay districts.

Priority

Aiken

Allendale

Barnwell

Burke

Columbia

Edgefield

McDuffie

Richmond

High

Mid

Mid

Mid

High

Mid

Mid

High

Regional Implementation

Recenter Regional High-Wage Employment

Agents of Action:

Counties & Cities

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Encourage housing near major employers to reduce commute burdens, diversify housing options and support economic mobility by revising zoning ordinances to allow for a mix of uses.
2. Expand access to jobs for low-income residents by improving transportation to key job hubs by partnering with major employers to provide more frequent and flexible transportation options.

5

Intermediate (1 Year – 3 Years)

1. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.
2. Establish an incentive framework that encourages local employers to become invested stakeholders and partners in public efforts to address workforce housing needs through employer-sponsored housing programs.

| Priority | Aiken | Allendale | Barnwell | Burke | Columbia | Edgefield | McDuffie | Richmond |
|----------|-------|-----------|----------|-------|----------|-----------|----------|----------|
| | High | Mid | Mid | Mid | High | Mid | Mid | High |

| Implementation Priority Level by Regional Character Area | Urban Core | Suburban Core | Exurban | Emerging Rural | Peripheral Rural |
|----------------------------------------------------------|------------|---------------|---------|----------------|------------------|
| Increase Development Density | High | High | Mid | Mid | Low |
| Prioritize Downtown Development | High | Mid | High | High | Mid |
| Improve & Expand Critical Infrastructure | Mid | Low | High | High | High |
| Address Workforce Housing as Critical Infrastructure | High | High | Mid | Mid | Mid |
| Recenter Regional High-Wage Employment | High | High | Mid | Mid | Mid |

Regional Implementation

Addressing Barriers to Implementation

While the strategies and recommendations outlined in this study offer pathways to address the Aiken-Augusta region's housing challenges, their implementation may be hindered by several key barriers. A consistent theme to all these barriers is a need for clearer communication, greater cooperation, and creative approaches to increasing the availability of resources, both financial and technical, to help induce additional and varied housing production.

Organizational & Administrative Capacity

- 1 For communities with few resources to increase capacity, consider forming a voluntary "Housing Cabinet" that meets regularly to discuss housing related topics and issues. Under-resourced communities should apply for grants to help with capacity building that fund permanent positions.
- 2 For communities that have the resources, hiring or designating a permanent staff member or team that is tasked with waking up every day and thinking about local housing issues can be the first step towards building the necessary capacity to address local issues.

Regional Coordination

- 1 There are three regional planning commissions, The Central Savannah River Area Regional Commission, The Upper Savannah Council of Governments and the Lower Savannah Council of Governments that provide pre-existing organizational and administrative infrastructure for coordinating around housing and economic development issues. These planning entities and other non-profit organizations that service the region can be excellent venues for city and county leaders to convene, seek technical support and secure grants and other resources.
- 2 There are few bi-state governmental organizations tasked with coordinating regionally. The primary entity that does so is Augusta Regional Transportation Study Metropolitan Planning Organization, which coordinates on transportation related matters. Similar efforts to coordinate housing should be explored, either by evolving this MPO infrastructure or by creating a new organization that works to coordinate housing and economic development efforts, offering funding opportunities and technical support.

Resource Scarcity

- 1 Resources available at the state and federal level, especially as they relate to housing related issues are often scarce and highly competitive. In order to secure new resources to support local efforts, communities should focus on increasing their competitive edge by increasing the technical capacity of grant-writing staff and by participating in regional and state programs that position counties and cities as more attractive grant applicants.
- 2 For communities with limited resources, or those hesitant to allocate existing funds toward housing, establishing new local revenue streams can be highly beneficial. Tools such as Special Service Districts, Community Improvement Districts, and Tax Allocation Districts/Tax Increment Financing can provide locally controlled funding to support housing initiatives.

Resistance to Development

- 1 For some communities, reframing growth as a natural process and rejecting growth opportunities as a set of lost opportunities for the community quantified as fewer services and lower capacity to deliver new community amenities like parks may be effective. Additionally, communities can also provide real and approachable examples of growth that can help to alleviate community fears around growth and development.
- 2 For such communities where the growth pressures are real but resistance to growth is insurmountable, an interim goal may be to negotiate "sacrifice zones", or areas where there is buy-in around some level of growth occurring.

Aiken County

Total Five-Year Demand: 4,276 Units

Market Profile

- Adapting water, sewer and road infrastructure
- Strong economic and population growth
- A mix of historic and new housing stock
- Diverse set of community characteristics

Housing Needs

Total Five-Year Gap: 1,340 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:

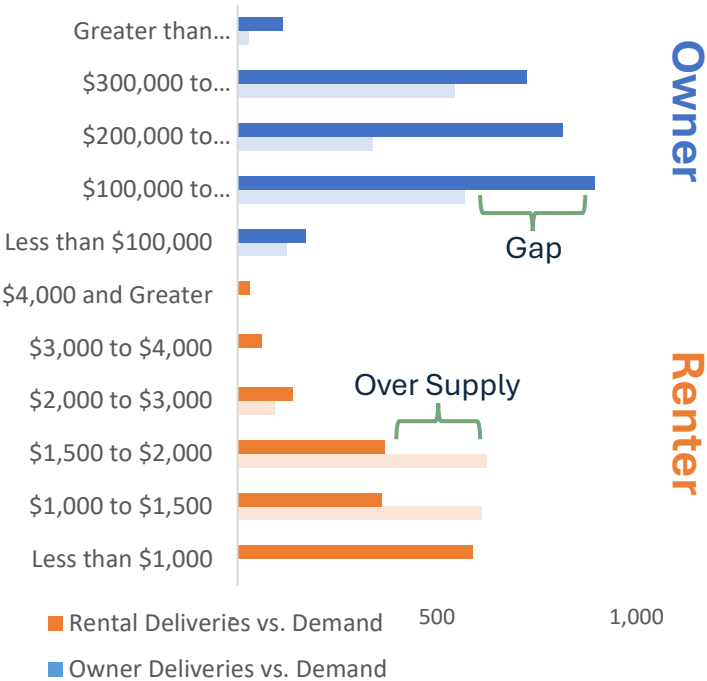


Entry level for-sale options AND Greater product diversity at the upper end of the spectrum



Affordable workforce rentals AND Luxury rental options in amenity-rich locations

Aiken County Historic Deliveries and Forecasted Demand



Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.

Intermediate (1 Year – 3 Years)

1. Create incentive tools, such as Tax Allocation Districts/Tax Increment Financing districts to support commercial redevelopment and infill projects that create housing units.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

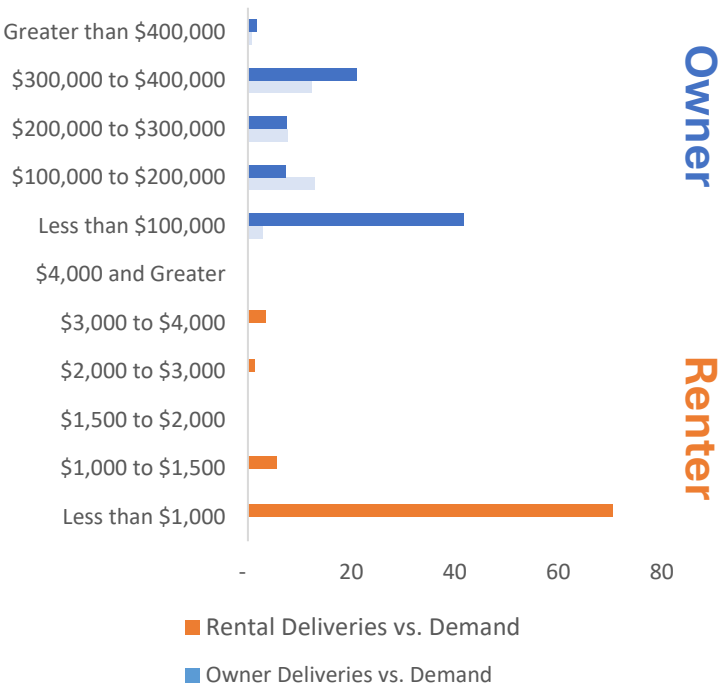
County & Cities

3. Encourage housing near major employers to reduce commute burdens, diversify housing options and support economic mobility by revising zoning ordinances to allow for a mix of uses.
4. Develop and adopt a residential “Pre-Approval Catalog”
3. Establish an incentive framework that encourages local employers to become invested stakeholders and partners in public efforts to address workforce housing needs through employer-sponsored housing programs.
4. Ensure that a share of new housing in high-demand areas is affordable to local workers by adopting inclusionary zoning overlay districts.

Allendale County

Total Five-Year Demand: 160 Units

Allendale County Historic Deliveries and Forecasted Demand



Market Profile

- Under-developed water, sewer and road infrastructure
- Historically declining population and economic base
- Aging housing stock and lack of community amenities
- Lack of recent investment due to perceived risks

Housing Needs

Total Five-Year Gap: 124 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:



Smaller format entry level for-sale homes AND Mid-market for-sale units suitable for higher-income families



Deeply affordable rental options AND Workforce rentals convenient to employment centers

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion
2. Establish a land bank or leverage existing land bank to convert abandoned and tax-delinquent properties into housing and community assets.

Intermediate (1 Year – 3 Years)

1. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

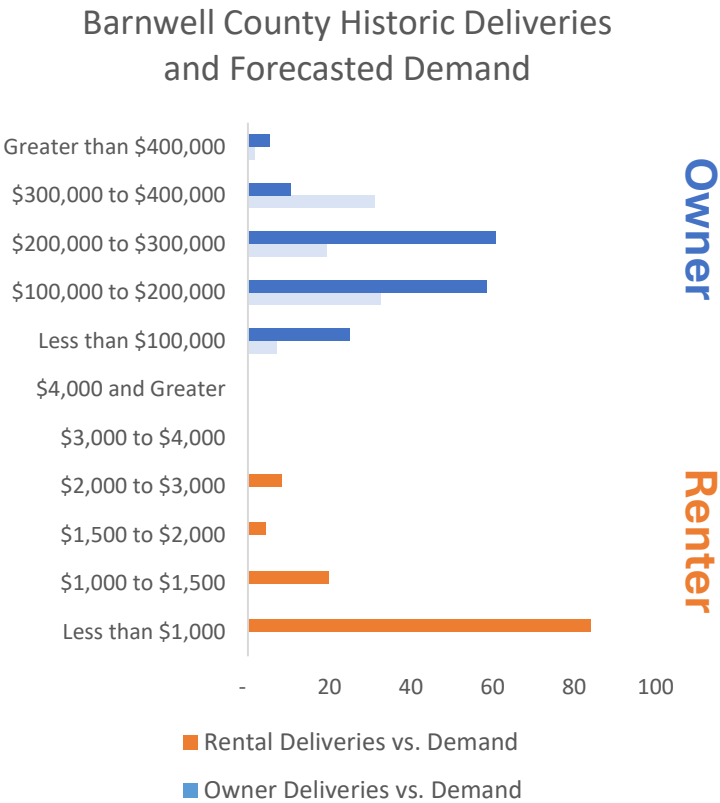
Agents of Action:

County & Cities

3. Form a Downtown Development Authority OR empower existing DDA with greater resources and technical support.
4. Promote safety and attractiveness in downtown through events programming.
3. Create a façade grant program to improve the appearance and perception of downtown, to support business activity and property value growth and to encourage downtown housing development.

Barnwell County

Total Five-Year Demand: 276 Units



Market Profile

- Under-developed water, sewer and road infrastructure
- Historically declining population and economic base
- Aging housing stock and lack of community amenities
- Well located to capture growth from Aiken County

Housing Needs

Total Five-Year Gap: 185 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:



Smaller format entry level for-sale homes AND Mid-market for-sale units suitable for higher-income families



Deeply affordable rental options AND Workforce rentals convenient to employment centers

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion
2. Establish a land bank or leverage existing land bank to convert abandoned and tax-delinquent properties into housing and community assets.

Intermediate (1 Year – 3 Years)

1. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

County & Cities

3. Form a Downtown Development Authority OR empower existing DDA with greater resources and technical support.
4. Promote safety and attractiveness in downtown through events programming.
3. Create a façade grant program to improve the appearance and perception of downtown, to support business activity and property value growth and to encourage downtown housing development.

Burke County

Total Five-Year Demand: 368 Units

Market Profile

- Presently adequate water, sewer and road infrastructure
- Strong history of utility investments now tapering off
- Locational disadvantages and lack of community amenities

Housing Needs

Total Five-Year Gap: -97* Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:

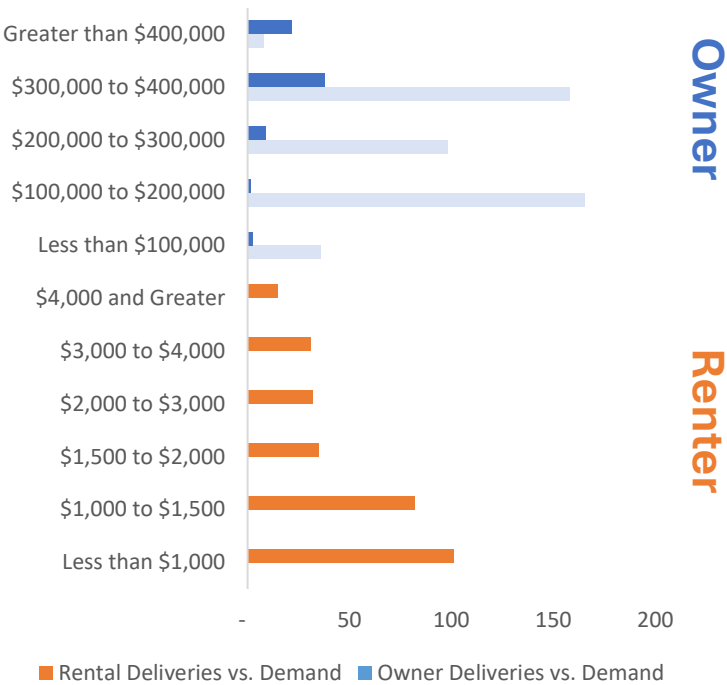


Mid-market for-sale options in central locations AND Upper-market custom builds



Affordable workforce rentals AND Luxury rental options in amenity-rich locations

Burke County Historic Deliveries and Forecasted Demand



Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion

Intermediate (1 Year – 3 Years)

1. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

County & Cities

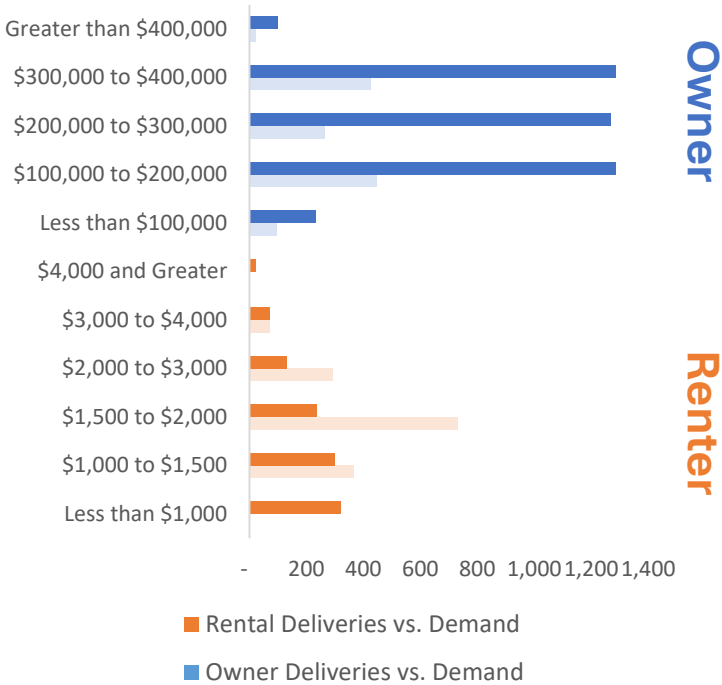
3. Promote safety and attractiveness in downtown through events programming.
 4. Develop and adopt a residential “Pre-Approval Catalog”
 5. Establish a land bank or leverage existing land bank to convert abandoned and tax-delinquent properties into housing and community assets.
-
3. Rezone or create overlays to allow for higher-density residential development near job centers, along commercial corridors and where existing infrastructure is already sufficient to support higher densities.
 4. Create a façade grant program to improve the appearance and perception of downtown, to support business activity and property value growth and to encourage downtown housing development.

*Burke County’s historic deliveries during the construction period of the Plant Vogtle expansion measured against projected demand result in a surplus rather than a gap

Columbia County

Total Five-Year Demand: 5,261 Units

Columbia County Historic Deliveries and Forecasted Demand



Market Profile

- Strong water, sewer and road infrastructure
- Strong economic and population growth
- Newest housing stock in the region on average
- Local policies may limit future production

Housing Needs

Total Five-Year Gap: 2,539 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:



Smaller-format for-sale options that deliver much needed entry-level options AND Diversity of mid-market options



Affordable workforce rentals AND Mid-market, luxury and senior rental options in amenity-rich locations

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.

Intermediate (1 Year – 3 Years)

1. Create incentive tools, such as Tax Allocation Districts/Tax Increment Financing districts to support commercial redevelopment and infill projects that create housing units.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

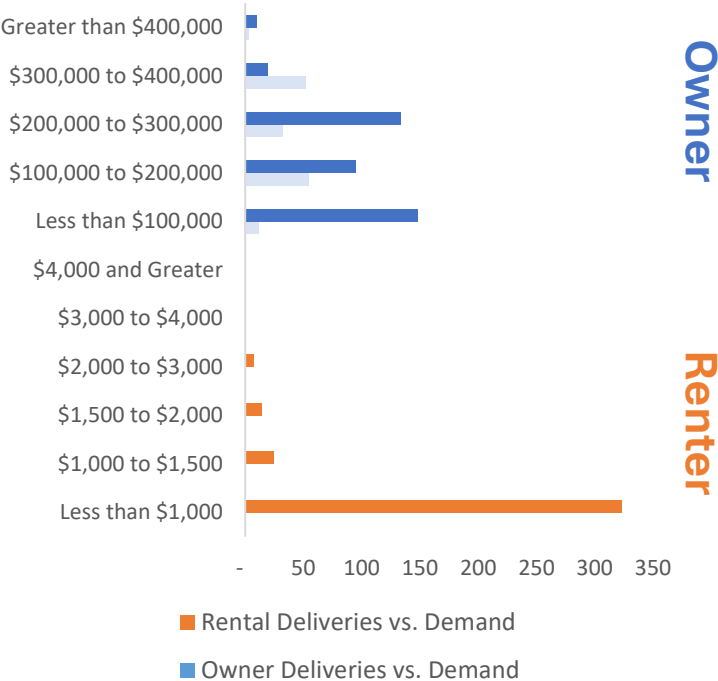
County & Cities

3. Encourage housing near major employers to reduce commute burdens, diversify housing options and support economic mobility by revising zoning ordinances to allow for a mix of uses.
4. Develop and adopt a residential “Pre-Approval Catalog”
3. Establish an incentive framework that encourages local employers to become invested stakeholders and partners in public efforts to address workforce housing needs through employer-sponsored housing programs.
4. Ensure that a share of new housing in high-demand areas is affordable to local workers by adopting inclusionary zoning overlay districts.

Edgefield County

Total Five-Year Demand: 775 Units

Edgefield County Historic Deliveries and Forecasted Demand



Market Profile

- Needed improvements to water and infrastructure
- Strategically located to absorb economic and population growth from Columbia, Aiken and Richmond

Housing Needs

Total Five-Year Gap: 623 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:



Entry level for-sale options AND Greater product diversity for mid-market for-sale options



Affordable workforce rentals AND Mid-market rental options in amenity-rich locations with existing infrastructure

Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion
3. Promote safety and attractiveness in downtown through events programming.

Intermediate (1 Year – 3 Years)

1. Rezone or create overlays to allow for higher-density residential development near job centers, along commercial corridors and where existing infrastructure is already sufficient to support higher densities.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

County & Cities

4. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.
5. Develop and adopt a residential “Pre-Approval Catalog”
3. Generate consistent local revenue to support investments in transportation, water and sewer projects through the creation of special tax districts like TADs/TIFs, SSDs and CIDs
4. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.

McDuffie County

Total Five-Year Demand: 459 Units

Market Profile

- Needed improvements to water and infrastructure
- Strategically located to absorb economic and population growth from Columbia, Aiken and Richmond

Housing Needs

Total Five-Year Gap: 356 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:

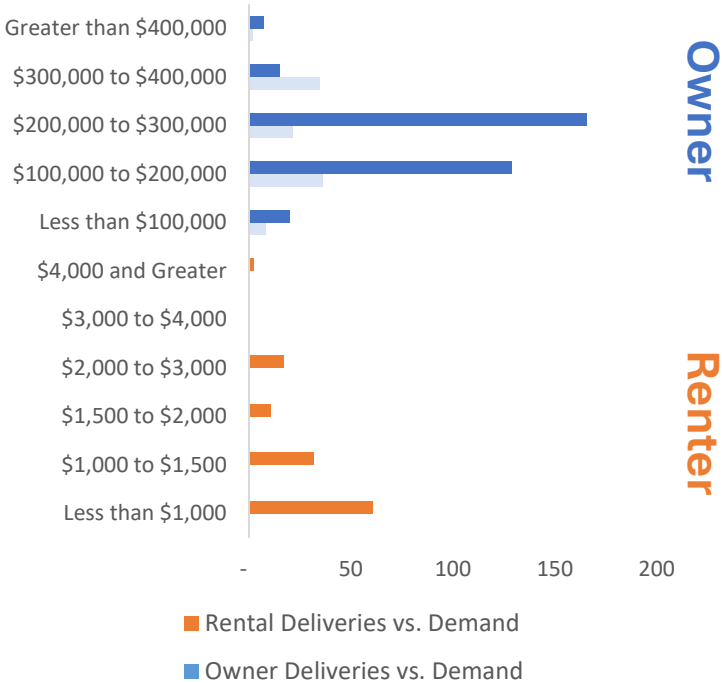


Entry level for-sale options AND Greater product diversity for mid-market for-sale options



Affordable workforce rentals AND Mid-market rental options in amenity-rich locations with existing infrastructure

McDuffie County Historic Deliveries and Forecasted Demand



Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Apply for federal and state grants in order to leverage available state and federal funding for water and sewer expansion
3. Promote safety and attractiveness in downtown through events programming.

Intermediate (1 Year – 3 Years)

1. Rezone or create overlays to allow for higher-density residential development near job centers, along commercial corridors and where existing infrastructure is already sufficient to support higher densities.
2. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.

Agents of Action:

County & Cities

4. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.
5. Develop and adopt a residential “Pre-Approval Catalog”
3. Generate consistent local revenue to support investments in transportation, water and sewer projects through the creation of special tax districts like TADs/TIFs, SSDs and CIDs
4. Leverage Tax Allocation Districts (TAD) or Tax Increment Financing (TIF) to support redevelopment of underperforming downtown areas to include more housing.

Richmond County

Total Five-Year Demand: 5,775 Units

Market Profile

- Robust but aging water, sewer and road infrastructure
- Strong economic and population growth
- Historic by aging housing stock
- Hindered by regional perceptions

Housing Needs

Total Five-Year Gap: 109 Units

In the chart to the right:

- Lighter colored blue and orange bars represent historic delivery patterns
- Darker colored blue and orange bars represent forecasted demand, suggesting a need for:

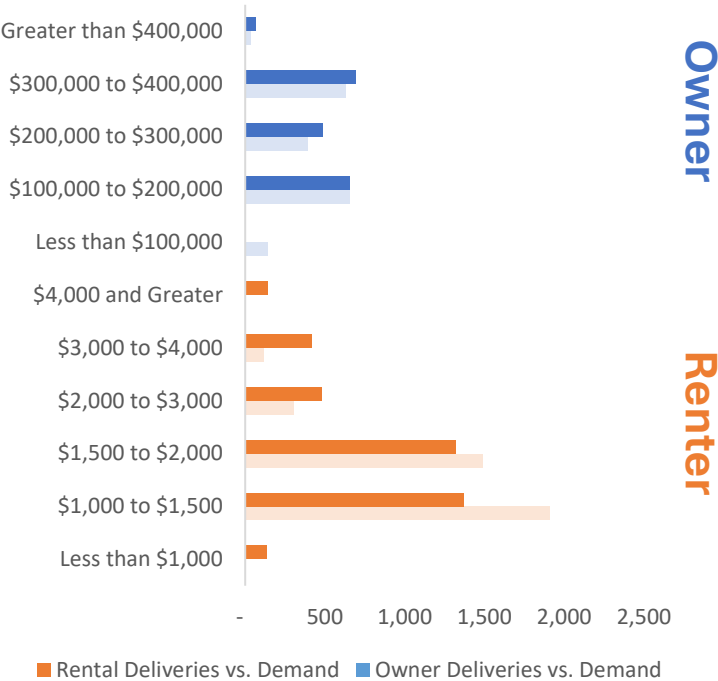


New for-sale options across a variety of typologies available at mid-market price points that offer urban conveniences



Affordable workforce rentals AND Luxury rental options in amenity-rich locations

Richmond County Historic Deliveries and Forecasted Demand



Implementable Strategies

Urgent (6 Months – 1 Year)

1. Legalize innovative housing unit typologies including cottage courts, tiny homes and accessory dwelling units (ADUs).
2. Unlock the potential of publicly owned land to address local housing needs by determining which parcels might be contributed towards private-led housing projects with affordable components.

Intermediate (1 Year – 3 Years)

1. Create a pipeline between local adult population that may lack the skills necessary to secure high-paying jobs and new industries recruited to the region by aligning industry recruitment efforts with job training programs.
2. Establish an incentive framework that encourages local employers to become invested stakeholders and partners in public efforts to address workforce housing needs through employer-sponsored housing programs.

Agents of Action:

County & Cities

3. Encourage housing near major employers to reduce commute burdens, diversify housing options and support economic mobility by revising zoning ordinances to allow for a mix of uses.
4. Develop and adopt a residential “Pre-Approval Catalog”
3. Ensure that a share of new housing in high-demand areas is affordable to local workers by adopting inclusionary zoning overlay districts.
4. Expand access to jobs for low-income residents by improving transportation to key job hubs by partnering with major employers to provide more frequent and flexible transportation options.



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