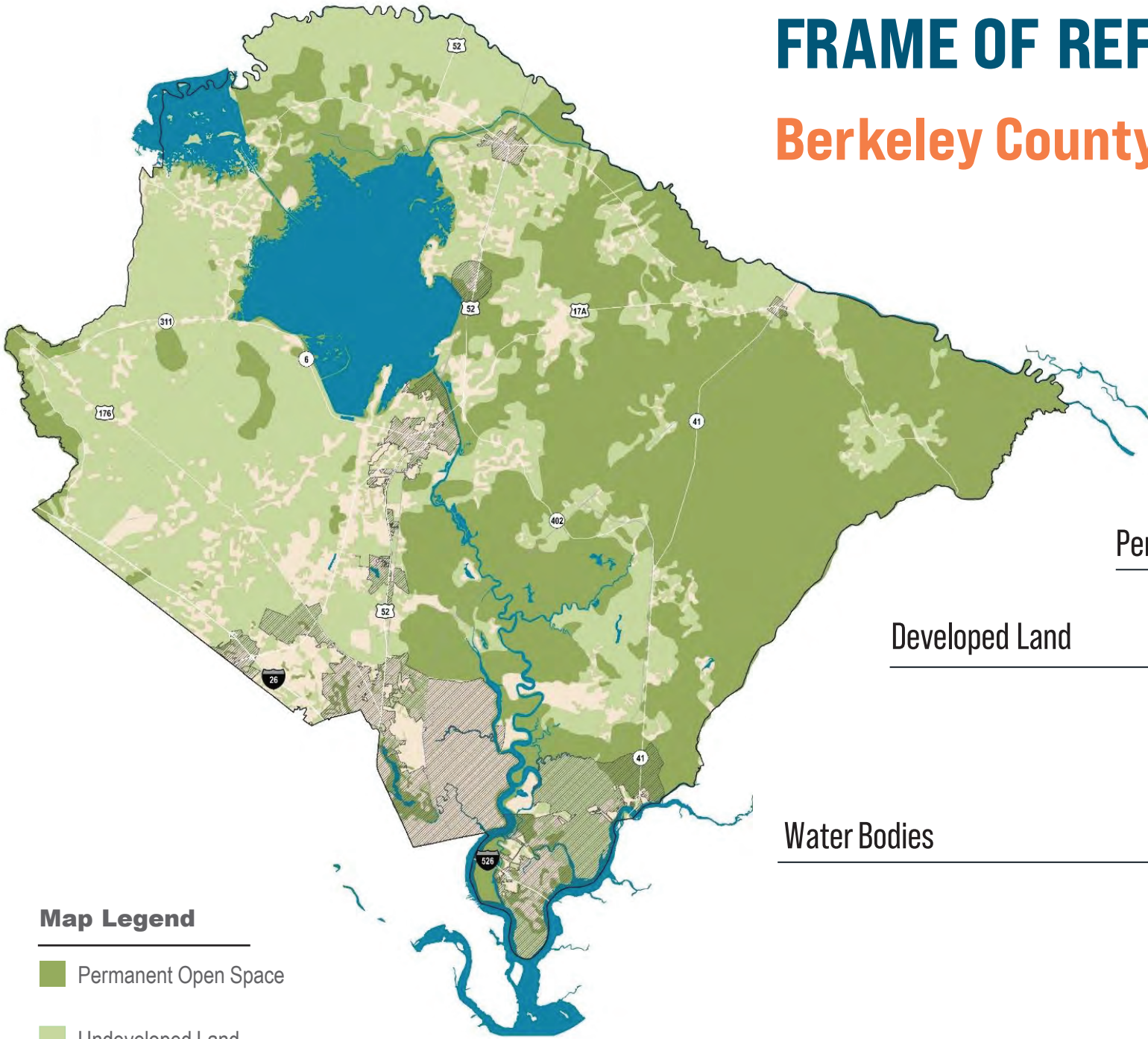


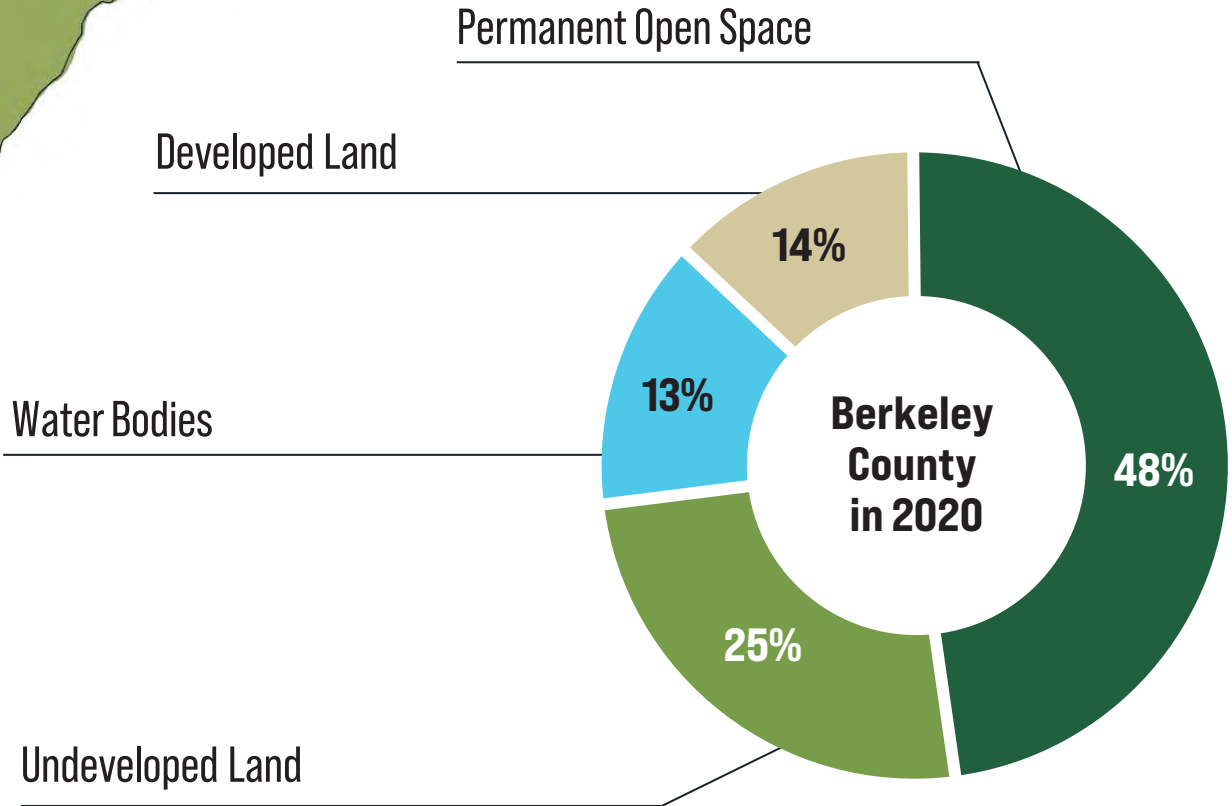
# FRAME OF REFERENCE FOR THE SCENARIO COMPARISONS

## Berkeley County Baseline Conditions



### Map Legend

- Permanent Open Space
- Undeveloped Land
- Developed Land (2020)
- Municipal Limits
- Water Bodies



 **229,861**  
Population

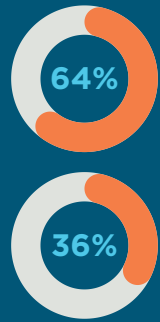
**84,461**  
Dwelling Units 

**60,274**  
Employees



**54,337,000**  
Non-Residential Square Feet  
(Retail • Office • Industrial • Institutional)

# Performance Measures of the COMMITTED DEVELOPMENT SCENARIO



## ACCESS TO AMENITIES BY 2040

Percent of all homes within 1/2-mile of existing parks and 1/4-mile of existing transit

## ADDED INFRASTRUCTURE BY 2040

Newly Added Roadway, Sewer, and Water Line Miles



527 MILES



562 MILES



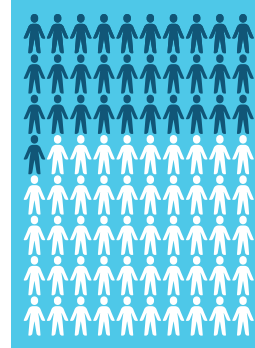
556 MILES

\$  
1.38

## FINANCIAL RETURN ON COMMITTED DEVELOPMENT

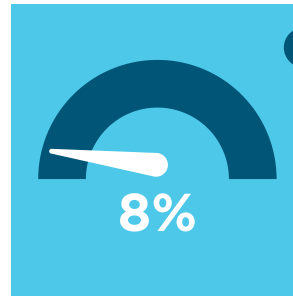
Anticipated Return on Investment (Net Return ÷ Cost)

This scenario answers the question -  
"What happens if we only allow what has already been approved as of 2020, and nothing more, through 2040"?



## POPULATION CHANGE

Population will increase by approximately 122,000 new individuals from the 2020 baseline population of 229,861. The total population in 2040 will increase to approximately 351,000. This is a 53% increase from the 2020 baseline, or about 2.65% per year over 20 years.



## JOB GROWTH

Committed Development will add approximately 5,000 new jobs to the existing 60,274 jobs in 2019, totaling about 65,000 jobs in 2040. This is an 8% increase from the 2020 baseline job numbers.

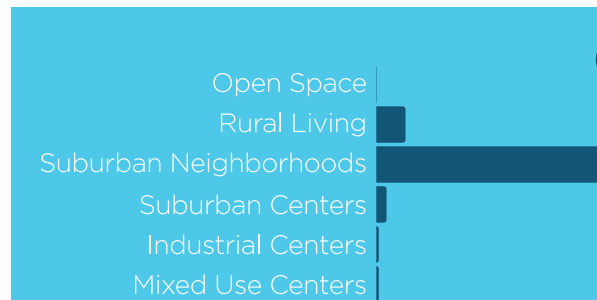


## HOUSING UNITS

In 2020, the County had approximately 84,461 total housing units. Committed Development will add 49,600 units resulting in a total of about 134,000 units by 2040, or a 59% increase.

**+8,505**  
NEWLY DEVELOPED  
COUNTY ACRES

*Of the total 689,323-acres in the County, about 14% of land was already developed in 2020. An additional 8,505 acres of development are committed through 2040.*

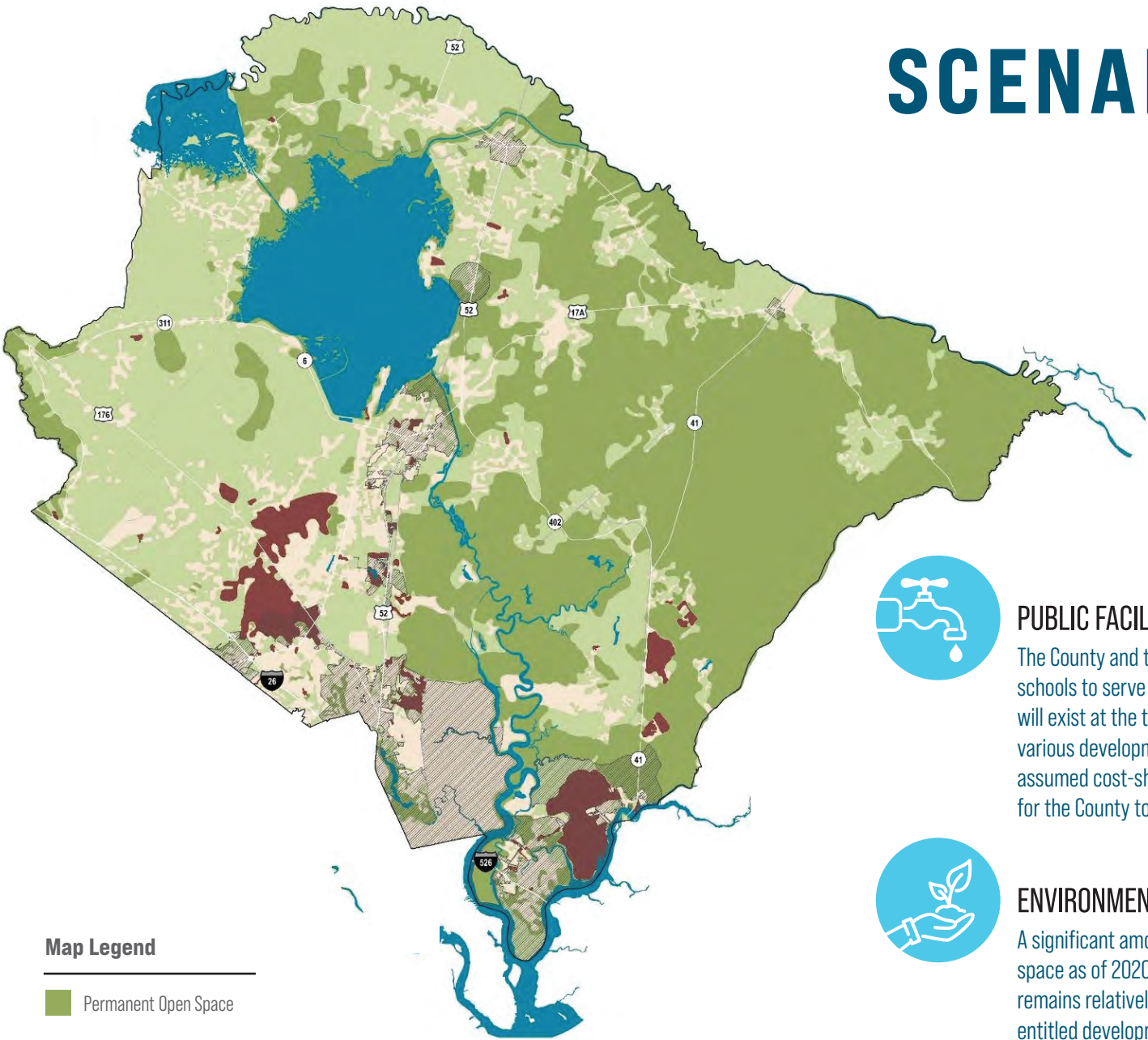


## DEVELOPMENT TYPES

The 8,505 newly developed acres can be categorized into six primary development types: Open Space, Rural Living, Suburban Neighborhoods, Suburban Centers, Industrial Centers, and Mixed Use Centers.



# SCENARIO A | COMMITTED DEVELOPMENT



## Map Legend

- Permanent Open Space
- Undeveloped Land
- Developed Land (2020)
- Newly-Developed Land (2020 to 2040)
- Municipal Limits
- Water Bodies



### PUBLIC FACILITIES & SERVICES

The County and their partners have planned their services areas for water, sewer, and schools to serve committed development (entitled) projects. It is assumed capacity will exist at the time it is needed to serve the entitled development approved in various development master plans (or their development-phasing plans). It is also assumed cost-sharing strategies are in place to offset some expensive investments for the County to serve the developments.



### ENVIRONMENTAL STEWARDSHIP

A significant amount of land in the County is permanently preserved as open space as of 2020. The amount of new open space preserved in the County remains relatively unchanged in the future if growth is not expanded beyond entitled development areas.



### DEVELOPMENT FOOTPRINT

Single-use, suburban development patterns and intensities are common in committed development; exemplified by suburban neighborhoods, highway strip commercial, and large industrial buildings. Mixed-use, walkable activity centers are not prevalent, and primarily focused inside different municipal limits or a limited number of specific intersection nodes in the County.



### JOBS-HOUSING PROXIMITY

Most employees will drive long distances for work. Only a few areas of the County may have jobs and housing located close enough together to realize expected benefits (i.e., shorter commute distances).



### RURAL LAND

Rural land preservation becomes an unintended benefit for Berkeley County as a result of rules and policies that limit development to previously-approved projects. Confining growth areas for the planning horizon, in part because of limited available infrastructure capacities, reduces threats to surrounding landscapes.



### VIABLE TRAVEL OPTIONS

Cars will be the primary mode of transportation for residents in the County. Investments in Interstate 26, various highways, and local roads will be needed to meet demands generated by the committed development. Transit remains a low-priority in the future.

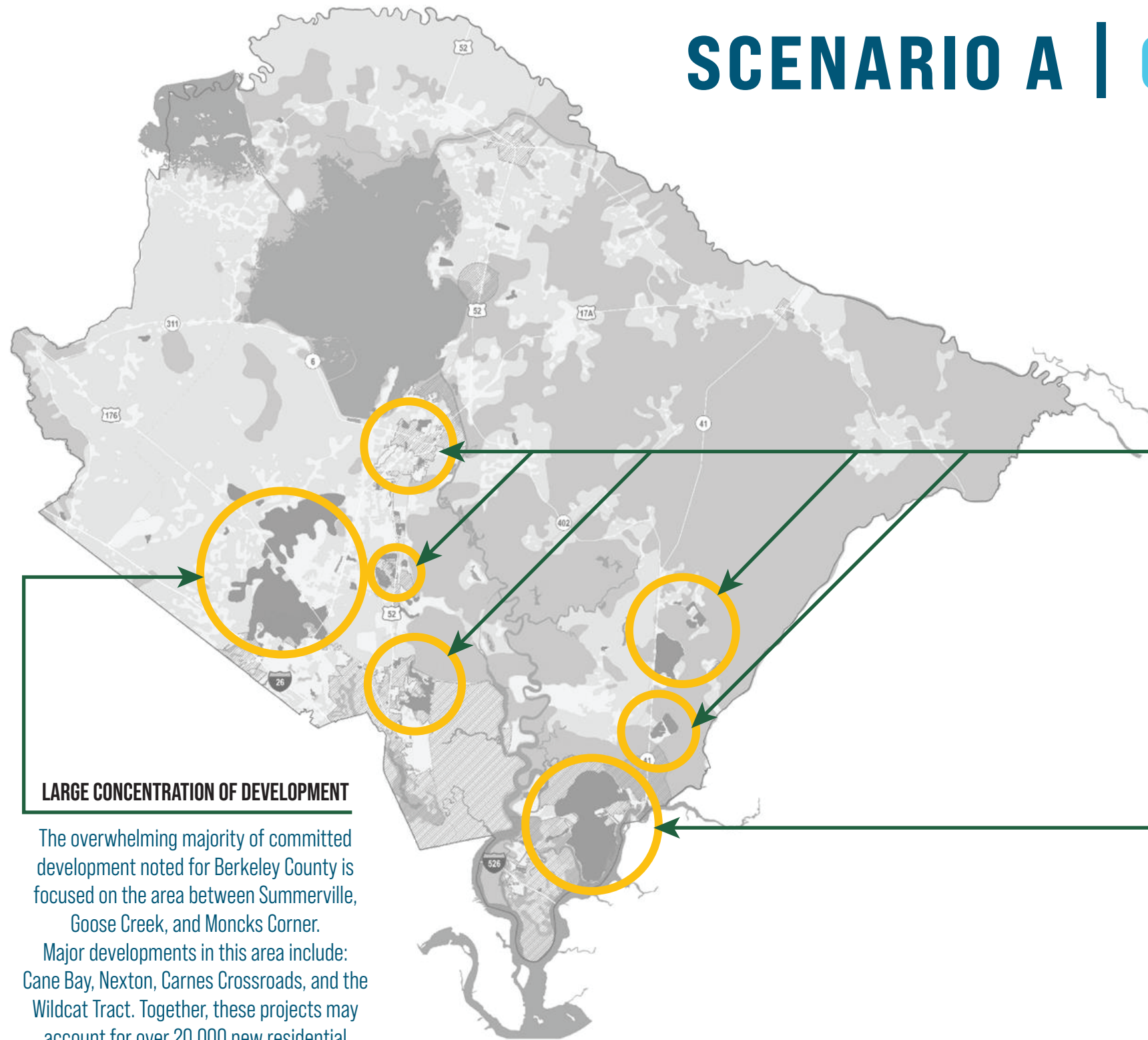


### HOUSING MIX

The County will see even more large-lot, single-family neighborhoods to meet future market demands — some of which may be in rural areas under current zoning. New neighborhoods would average fewer than three homes per acre. The County will see even more large-lot, single-family neighborhoods to meet future market demands — some of which may be in rural areas under current zoning. New neighborhoods would average fewer than three homes per acre.

# SCENARIO A | COMMITTED DEVELOPMENT

## Intended Growth Areas



### LARGE CONCENTRATION OF DEVELOPMENT

The overwhelming majority of committed development noted for Berkeley County is focused on the area between Summerville, Goose Creek, and Moncks Corner.

Major developments in this area include: Cane Bay, Nexton, Carnes Crossroads, and the Wildcat Tract. Together, these projects may account for over 20,000 new residential dwelling units over the twenty-year planning horizon, 2020 to 2040.

### CUMULATIVE IMPACTS

While most of the focus is on build out of large, mega developments in the County, there are several smaller projects already approved that together will create measurable opportunities and impacts for the community. The cumulative impacts of projects along US Highway 52 and SC Highway 41 are being monitored.

### CAINHOY PLANTATION DEVELOPMENT

Development inside the boundaries for Cainho Plantation will literally transform this area of Charleston and surrounding Berkeley County. 18,000 residential dwelling units are entitled in this location; however, County planning staff anticipated up to 11,000 units will be built over the twenty-year planning horizon, 2020 to 2040. Both opportunities and impacts from this development will be tremendous. Officials anticipated significant traffic congestion in the area — especially on and near Clements Ferry Road.



Performance Measures of the

# TREND DEVELOPMENT SCENARIO



**ACCESS TO AMENITIES BY 2040**  
Percent of all homes within 1/2-mile of existing parks and 1/4-mile of existing transit

**ADDED INFRASTRUCTURE BY 2040**  
Newly Added Roadway, Sewer, and Water Line Miles



911 MILES



897 MILES



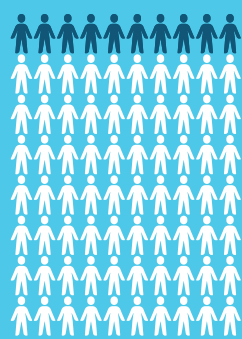
960 MILES

\$

1.51

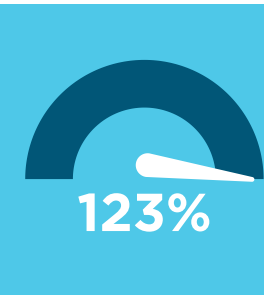
**FINANCIAL RETURN ON COMMITTED DEVELOPMENT**  
Anticipated Return on Investment (Net Return ÷ Cost)

This scenario answers the question - "What happens by 2040 if we continue developing in the same way as we have been in the recent past?" It shows the "business-as-usual" scenario. Reported measures include baseline and committed development numbers.



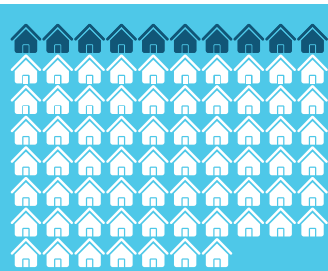
## POPULATION CHANGE

Population would increase by approximately 48,000 more individuals from the baseline and committed population subtotal of 351,000, totaling about 399,000. This is a 74% increase from the 2020 baseline population, or 3.7% per year over 20 years.



## JOB GROWTH

Trend Development will add another 69,200 more jobs to the baseline and committed subtotal of 65,000, totaling about 134,500 jobs in 2040. This is a 123% increase from the 2020 baseline.



## HOUSING UNITS

Existing and committed housing totaled 134,000 units. Trend Development will add another 19,600 housing units, resulting in a total of 154,000 units by 2040, or an 82% increase from 2020.



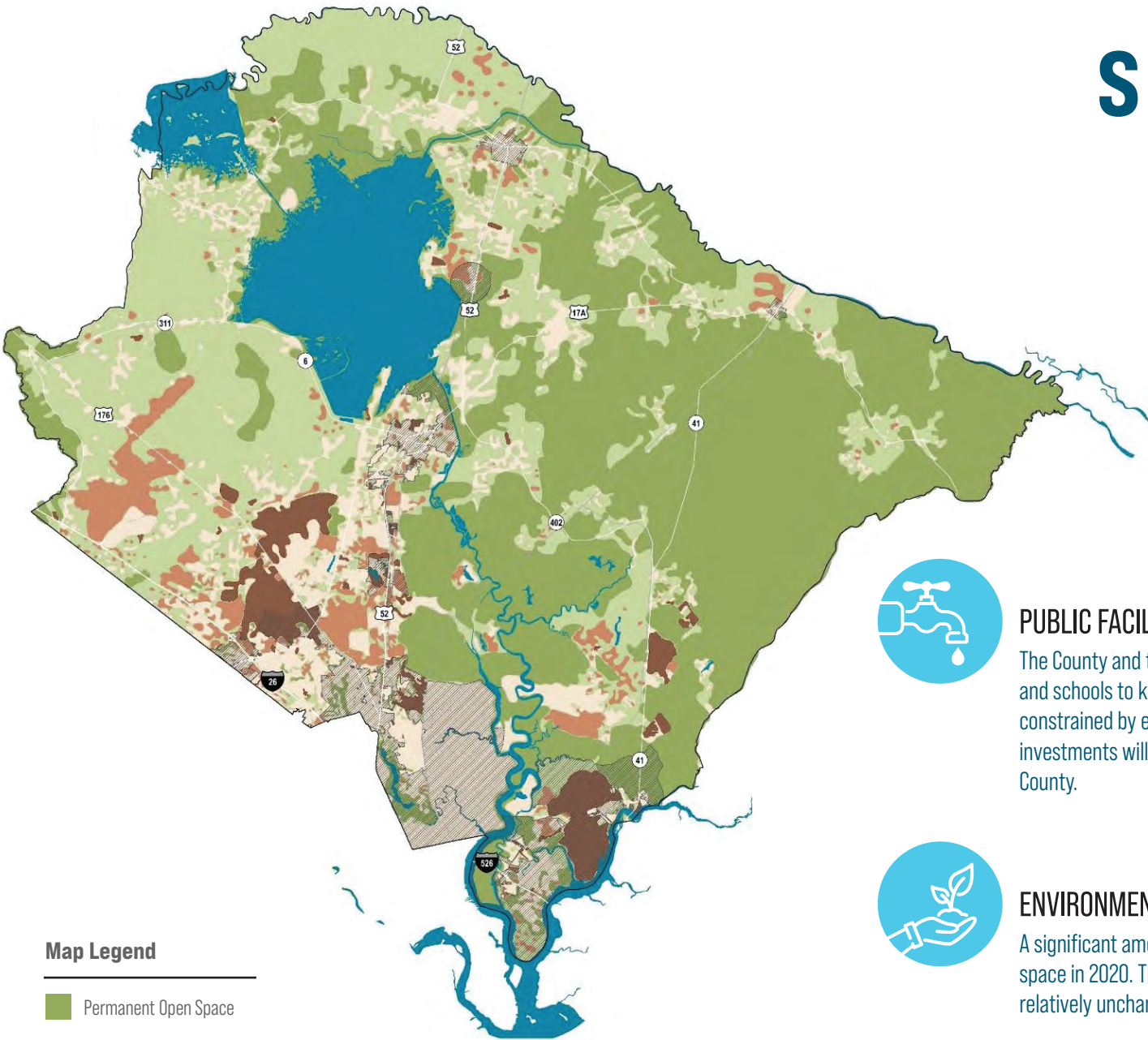
*Of the total 689,323-acres in the County, about 14% of land was already developed in 2020. In addition to the 8,505 committed acres, another 11,730 acres of development would occur in the Trend Scenario.*



## DEVELOPMENT TYPES

The 11,730 newly developed acres can be categorized into six primary development types: Open Space, Rural Living, Suburban Neighborhoods, Suburban Centers, Industrial Centers, and Mixed Use Centers.

# SCENARIO B | TREND DEVELOPMENT



**Map Legend**

- Permanent Open Space
- Undeveloped Land
- Developed Land (2020)
- Newly-Developed Land (2020 to 2040)
- Municipal Limits
- Water Bodies



### PUBLIC FACILITIES & SERVICES

The County and their partners will expand their services areas for water, sewer, and schools to keep up with an expanding development footprint. Growth is not constrained by existing services areas, and expensive infrastructure investments will be needed to expand services areas and service capacity in the County.



### ENVIRONMENTAL STEWARDSHIP

A significant amount of land in the County is permanently preserved as open space in 2020. The amount of new open space preserved in the County remains relatively unchanged in the scenario.



### DEVELOPMENT FOOTPRINT

Single-use, low-density development patterns and intensities spread throughout the County; exemplified by suburban neighborhoods, highway strip commercial, and large industrial buildings. Mixed-use, walkable activity centers are not prevalent, and primarily focused inside different municipal limits.



### JOBS-HOUSING PROXIMITY

Most employees will drive long distances for work. Only a few areas of the County may have jobs and housing located close enough together to realize expected benefits (i.e., shorter commute distances).



### RURAL LAND

Rural land preservation is not a priority for Berkeley County. Significant land is lost to new development between 2020 and 2040, which compromises rural character in the County indicative of suburban sprawl.



### VIABLE TRAVEL OPTIONS

Cars will be the primary mode of transportation for residents in the County. Investments in Interstate 26 and various US and SC Highways will be needed to keep up with growth. Transit remains a low-priority in the scenario.



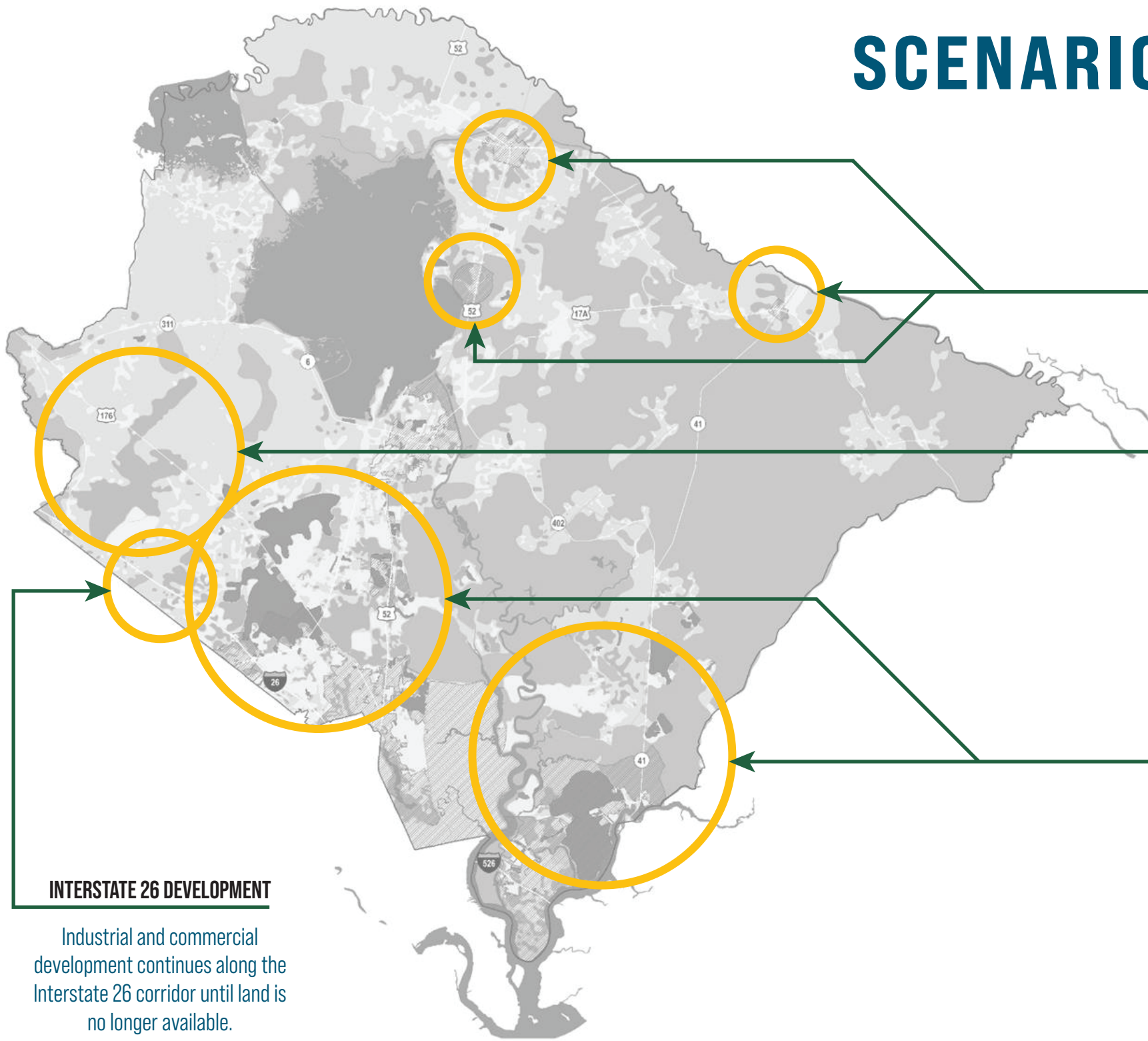
### HOUSING MIX

The County will see even more large-lot, single-family neighborhoods to meet future market demands. New neighborhoods in rural areas would average fewer than three homes per acre.



# SCENARIO B | TREND DEVELOPMENT

## Intended Growth Areas



### SLOW-GROWTH IN NORTHERN COMMUNITIES

Most of the County's incorporated communities in the north – St. Stephen, Jamestown, and Bonneau – will see very little development pressures for the period between 2020 and 2040.

### WESTERN BERKELEY COUNTY GROWTH PRESSURES

Areas east of Camp Hall will develop in the future as infrastructure is extended in the area – in particular the Palmetto Railroad. Areas along US Highway 176 and Volvo Car Drive continue to transform into a residential and industrial enclave within the County.

### DEVELOPMENT AROUND LARGE PLANNED NEIGHBORHOODS

The scenario assumes all committed development from Scenario A is completed, and new planned developments are attracted to the County, in part, because of their proximity to future employment areas.

### INTERSTATE 26 DEVELOPMENT

Industrial and commercial development continues along the Interstate 26 corridor until land is no longer available.

Performance Measures of the

# ACCELERATED TREND DEVELOPMENT SCENARIO



**ACCESS TO AMENITIES BY 2040**  
Percent of all homes within  
1/2-mile of existing parks  
and 1/4-mile of existing  
transit

**ADDED INFRASTRUCTURE BY 2040**  
Newly Added Roadway,  
Sewer, and Water Line Miles



1,243 MILES



998 MILES



1,292 MILES

\$

1.39

**FINANCIAL RETURN ON  
COMMITTED DEVELOPMENT**  
Anticipated Return on  
Investment (Net Return ÷ Cost)

This scenario answers the question -  
"What happens by 2040 if growth in the County approaches the maximum end of the forecasted range?"  
Reported measures include baseline and committed development numbers.



## POPULATION CHANGE

Population would increase by approximately 117,000 more individuals from the baseline and committed population subtotal of 351,000, totaling 68,000. This is a 104% increase from the 2020 baseline population, or 5.2% per year over 20 years.



## JOB GROWTH

Accelerated Trend Development will add another 69,200 more jobs to the baseline and committed subtotal of 65,000, totaling 134,500 jobs in 2040. This is a 123% increase from the 2020 baseline.



## HOUSING UNITS

Existing and committed housing totaled 134,000 units. Accelerated Trend Development would add another 47,500 units, resulting in a total of 181,500 units by 2040, or a 115% increase from 2020.



*Of the total 689,323-acres in the County, about 14% of land was already developed in 2020. In addition to the 8,505 committed acres, another 16,537 acres of development would occur in the Accelerated Trend Scenario*



## DEVELOPMENT TYPES

The 16,537 newly developed acres can be categorized into six primary development types: Open Space, Rural Living, Suburban Neighborhoods, Suburban Centers, Industrial Centers, and Mixed Use Centers.



# SCENARIO C | ACCELERATED TREND DEVELOPMENT

## Map Legend

- Permanent Open Space
- Undeveloped Land
- Developed Land (2020)
- Newly-Developed Land (2020 to 2040)
- Municipal Limits
- Water Bodies



## PUBLIC FACILITIES & SERVICES

The County and their partners will expand their services areas for water, sewer, and schools to keep up with an expanding development footprint. Growth is not constrained by existing services areas, and expensive infrastructure investments will be needed to expand services areas and service capacity in the County.



## ENVIRONMENTAL STEWARDSHIP

A significant amount of land in the County is permanently preserved as open space in 2020. The amount of new open space preserved in the County remains relatively unchanged in this scenario.



## DEVELOPMENT FOOTPRINT

Single-use, low-density development patterns and intensities spread throughout the County; exemplified by suburban neighborhoods, highway strip commercial, and large industrial buildings. Mixed-use, walkable activity centers are not prevalent, and primarily focused inside different municipal limits.



## JOBS-HOUSING PROXIMITY

Most employees will drive long distances for work. Only a few areas of the County may have jobs and housing located close enough together to realize expected benefits (i.e., shorter commute distances).



## RURAL LAND

Increased growth pressures extend into rural areas, and further degrades rural character preservation efforts. Significant conversion of agriculture and vacant lands to more intensive land uses occurs in an ad hoc “rural sprawl” development pattern.



## VIABLE TRAVEL OPTIONS

Cars will be the primary mode of transportation for residents in the County. Investments in Interstate 26 and various US and SC Highways will be needed to keep up with growth. Transit remains a low-priority in this scenario.



## HOUSING MIX

The County will see demand for even more large-lot, single-family neighborhoods to meet future market demands. New neighborhoods would average fewer than three homes per acre.

# SCENARIO C | ACCELERATED TREND DEVELOPMENT

## Intended Growth Areas

### FASTER GROWTH IN NORTHERN COMMUNITIES

Most of the County's incorporated communities in the north – St. Stephen, Jamestown, and Bonneau – will see moderate development pressures for the period between 2020 and 2040. Spillover growth in less-developed areas of the north will also occur as future year growth forecasted for the County increases significantly.

### LOW-DENSITY, SPRAWL DEVELOPMENT PATTERNS

New development continues to sprawl outward from existing communities, and/or leapfrogs into new areas that require expensive infrastructure investments to increase service areas.

### DEVELOPMENT AROUND LARGE PLANNED NEIGHBORHOODS

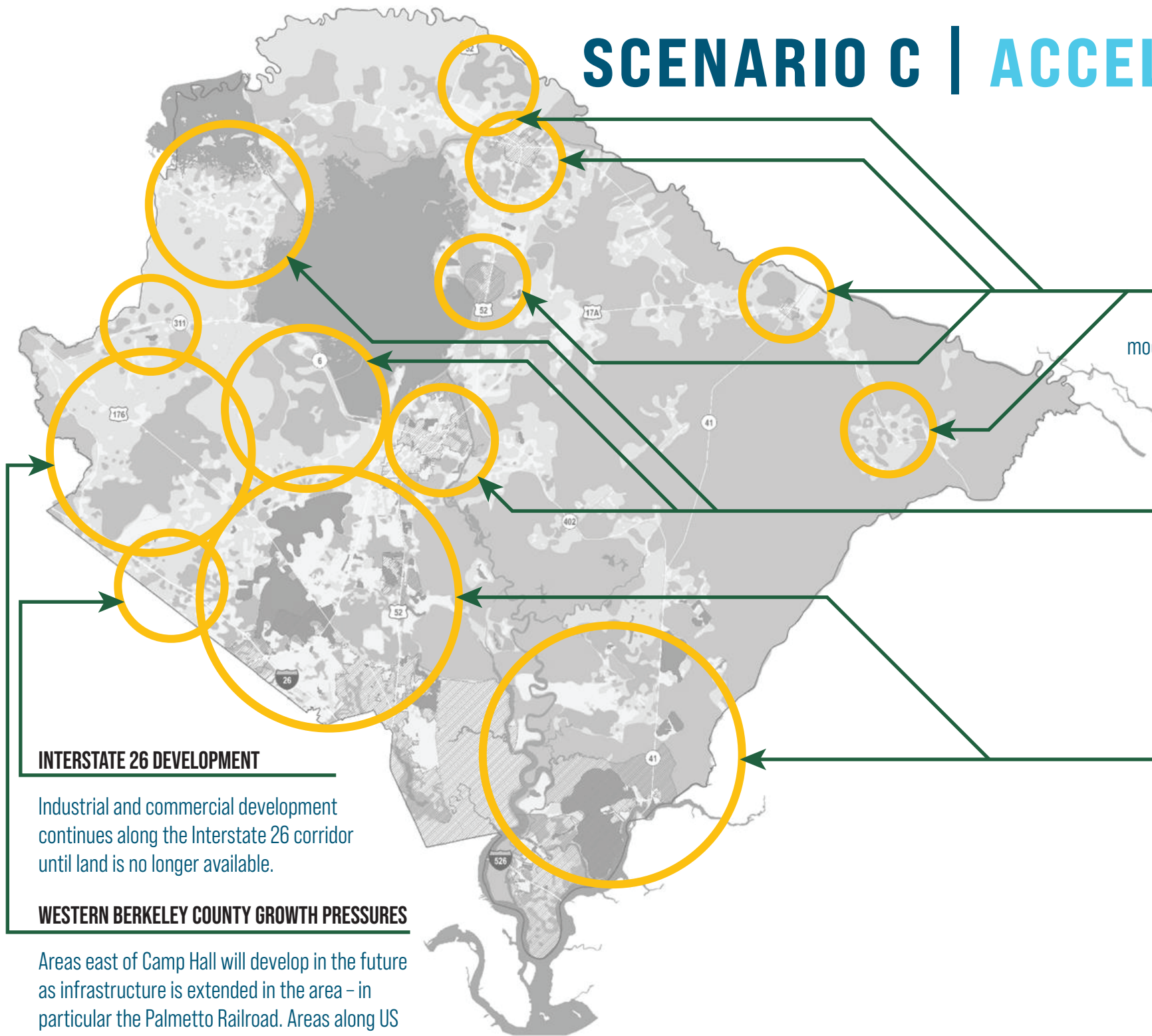
The scenario assumes all committed development from Scenario A is completed, and new planned developments are attracted to the County, in part, because of their proximity to future employment areas.

### INTERSTATE 26 DEVELOPMENT

Industrial and commercial development continues along the Interstate 26 corridor until land is no longer available.

### WESTERN BERKELEY COUNTY GROWTH PRESSURES

Areas east of Camp Hall will develop in the future as infrastructure is extended in the area – in particular the Palmetto Railroad. Areas along US Highway 176 and Volvo Car Drive continue to transform into a residential and industrial enclave within the County.





Performance Measures of the  
**MANAGED GROWTH  
DEVELOPMENT SCENARIO**



**ACCESS TO AMENITIES BY 2040**  
Percent of all homes within  
1/2-mile of existing parks  
and 1/4-mile of existing  
transit

**ADDED INFRASTRUCTURE BY 2040**  
Newly Added Roadway,  
Sewer, and Water Line Miles



981 MILES



1,098 MILES

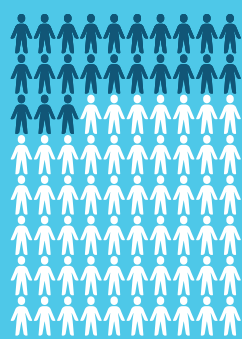


1,076 MILES

\$  
**1.48**

**FINANCIAL RETURN ON  
COMMITTED DEVELOPMENT**  
Anticipated Return on  
Investment (Net Return ÷ Cost)

This scenario answers the question -  
"What happens by 2040 if the County implements land development regulations consistent with public  
feedback?" Reported measures include baseline and committed development numbers.



**POPULATION CHANGE**

Population would increase by approximately 117,000 more individuals from  
the baseline and committed population subtotal of 351,000, totaling 68,000.  
This is a 104% increase from the 2020 baseline population, or 5.2% per year  
over 20 years.



**JOB GROWTH**

The Managed Growth scenario would add another 69,200 more jobs to the  
baseline and committed subtotal of 65,000, totaling 134,500 jobs in 2040.  
This is a 123% increase from the 2020 baseline.

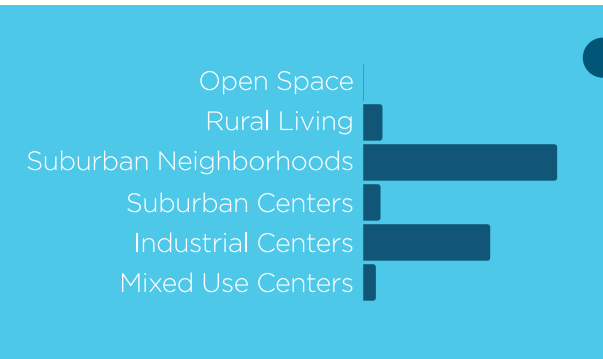


**HOUSING UNITS**

Existing and committed housing totaled 134,000 units. Managed Growth  
would add another 47,500 units, resulting in a total of 181,500 units by 2040,  
or a 115% increase from 2020.

**+11,706**  
NEWLY DEVELOPED  
COUNTY ACRES

*Of the total 689,323-acres in the County, about 14% of land was already  
developed in 2020. In addition to the 8,505 committed acres, another 11,706  
acres of development would occur in the Managed Growth Scenario.*



**DEVELOPMENT TYPES**

The 11,706 newly developed acres can be categorized into six primary  
development types: Open Space, Rural Living, Suburban Neighborhoods,  
Suburban Centers, Industrial Centers, and Mixed Use Centers.

# SCENARIO D | MANAGED GROWTH DEVELOPMENT

## Map Legend

- Permanent Open Space
- Undeveloped Land
- Developed Land (2020)
- Newly-Developed Land (2020 to 2040)
- Municipal Limits
- Water Bodies



### PUBLIC FACILITIES & SERVICES

Growth is focused into existing water, sewer, and school district service areas to the maximum extent possible. This helps reduce or eliminate additional government investments to extend infrastructure into new areas to support future development. The cost-to-serve new development is reduced by using existing resources.



### ENVIRONMENTAL STEWARDSHIP

The County shows a renewed interest in environmental stewardship across different communities. Local governments and private land conservation groups work together to highlight the need to preserve natural areas. The amount of land in the region held as permanent open space (parks, greenways, etc.) increases.



### DEVELOPMENT FOOTPRINT

New growth is focused into compact, walkable activity centers concentrated along premium transportation corridors (bus rapid transit). Nearby opportunities to live, work, shop, and be entertained draw people to (sub)urbanizing areas. Land outside planned activity centers and surrounding transition areas is primarily preserved for open space, farmland, or rural living.



### JOBS-HOUSING PROXIMITY

The concentration of mixed-use, walkable activity centers in key areas of the County significantly increases opportunities to link jobs and housing in close proximity.



### RURAL LAND

Rural land preservation is a high priority for the County. Rural areas are protected using policies, rules, or incentives that promote farming or rural stewardship.



### VIABLE TRAVEL OPTIONS

Cars are the primary mode of transportation for residents in the County. However, investments in premium transit (bus rapid transit) are increased in more targeted areas to meet daily commuting needs. Regional bus service connects riders with premium transit corridors. Mixed-use, walkable development in planned activity centers shorten trip lengths and increase the number of viable travel mode options.



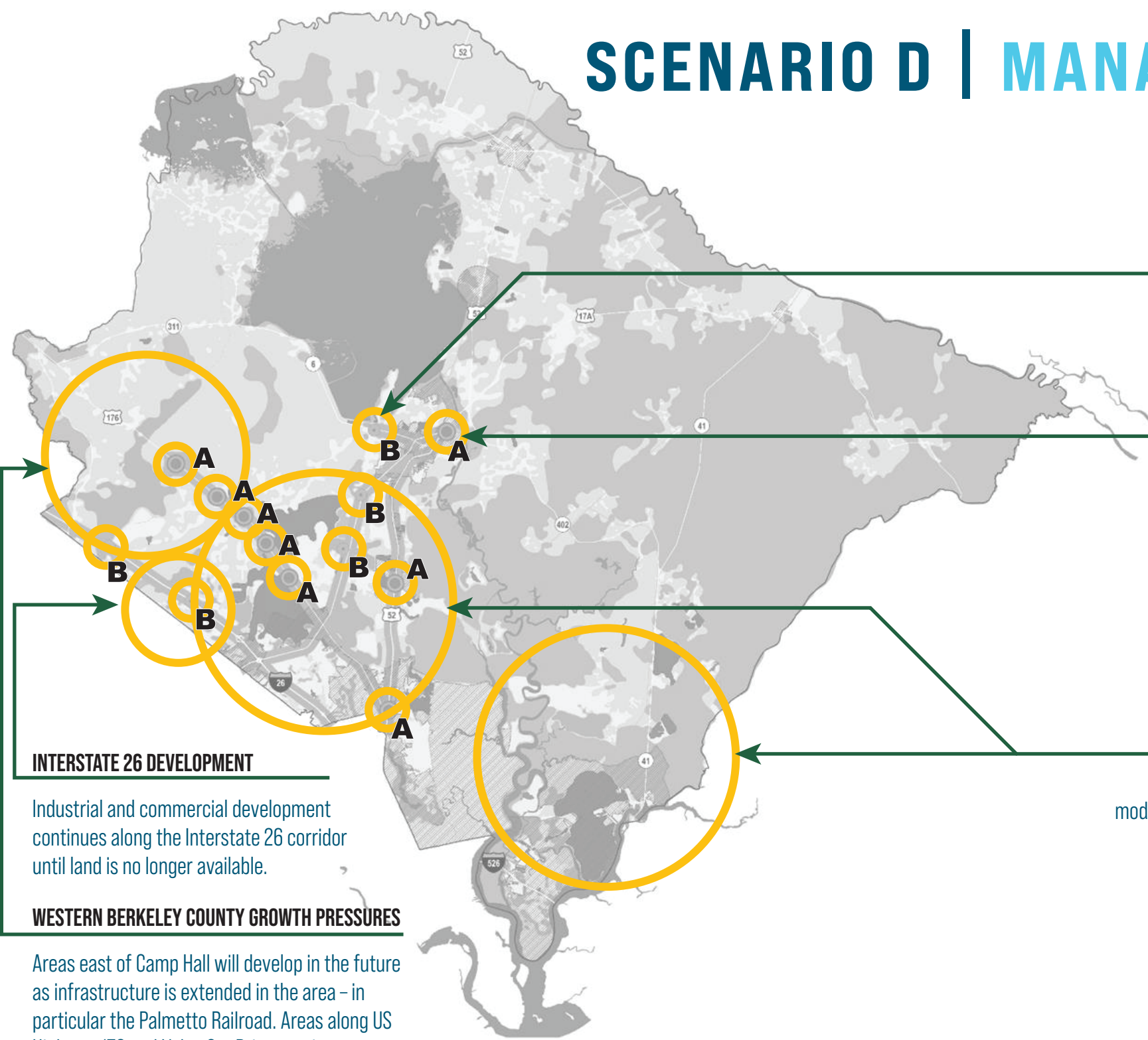
### HOUSING MIX

New neighborhood design and housing choices favor a shift to greater variety of housing options in the community (and often times in the same neighborhood). Average residential densities in designated growth areas range between 4 to 20 homes per acre; emphasizing small-lot, single-family detached housing, townhomes, condominiums, and apartments.



# SCENARIO D | MANAGED GROWTH DEVELOPMENT

## Intended Growth Areas



### INTERSTATE 26 DEVELOPMENT

Industrial and commercial development continues along the Interstate 26 corridor until land is no longer available.

### WESTERN BERKELEY COUNTY GROWTH PRESSURES

Areas east of Camp Hall will develop in the future as infrastructure is extended in the area – in particular the Palmetto Railroad. Areas along US Highway 176 and Volvo Car Drive continue to transform into a residential and industrial enclave within the County.

### MIXED-USE DEVELOPMENT ACTIVITY CENTERS (B)

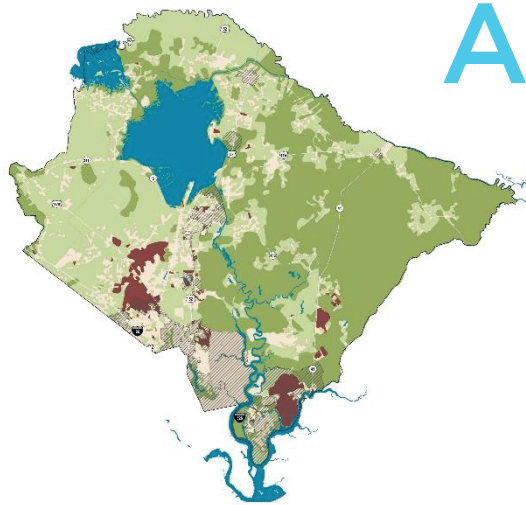
Multiple mixed-use, walkable activity centers are planned along Interstate 26 and US Highway 17A to concentrate new development in the County. A more compact development area concentrates infrastructure investments and aims to realize different efficiencies and economies-of-scale.

### TRANSIT-ORIENTED DEVELOPMENT NODES (A)

Multiple station areas for a bus rapid transit (BRT) are planned along the US Highway 52 corridor as an extension of the region’s planned service south of Berkeley County. A new BRT corridor along the US Highway 176 creates a “development spine” for the priority growth area generally bounded by Interstate 26, US 52, US 176, and the Berkeley-Orangeburg County Line. A more compact development area concentrates infrastructure investments and aims to realize different efficiencies and economies-of-scale.

### DEVELOPMENT AROUND LARGE PLANNED NEIGHBORHOODS

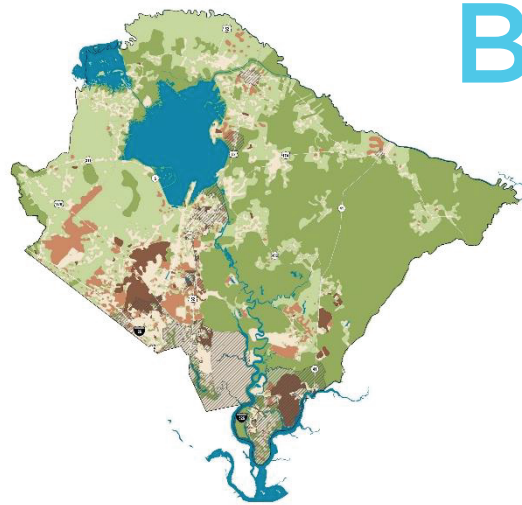
Most of the County’s incorporated communities in the north – St. Stephen, Jamestown, and Bonneau – will see moderate development pressures for the period between 2020 and 2040. Spillover growth in less-developed areas of the north will also occur as future year growth forecasted for the County increases significantly.



A

COMMITTED  
DEVELOPMENT

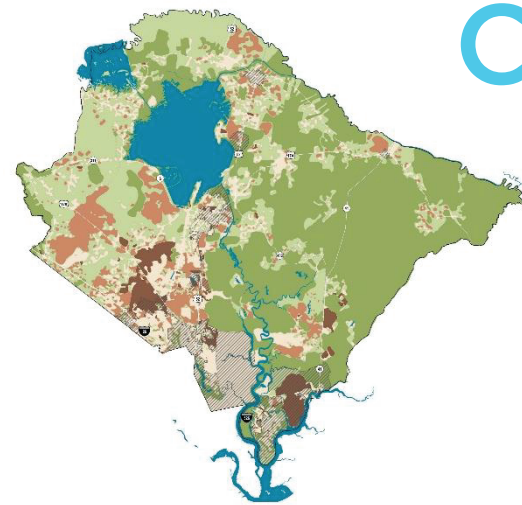
Population (2040)	351,000
Employment (2040)	65,000
Total Housing Units (2040)	134,000
New Development Footprint Context (2040)	
Rural Living	11%
Suburban Neighborhoods	83%
Suburban Centers	4%
Industrial Centers	1%
Mixed Use Centers	1%
New Home Construction Choices (2040)	
Single Family Detached	79%
Townhome, Duplex or Triplex	7%
Apartment or Condominium	14%
Commitment to Open Space	No Change
Increase in Development Footprint	+8,505 acres
Access to Amenities (2040)	
Homes within ½ Mile of Existing Parks	64%
Homes within ¼ Mile of Existing Transit	36%
Increased Infrastructure Needs (2040)	
New Road Centerline Miles	527
New Water Line Miles	556
New Sewer Line Miles	562
Financial Return on Investment Index	1.38



B

TREND DEVELOPMENT

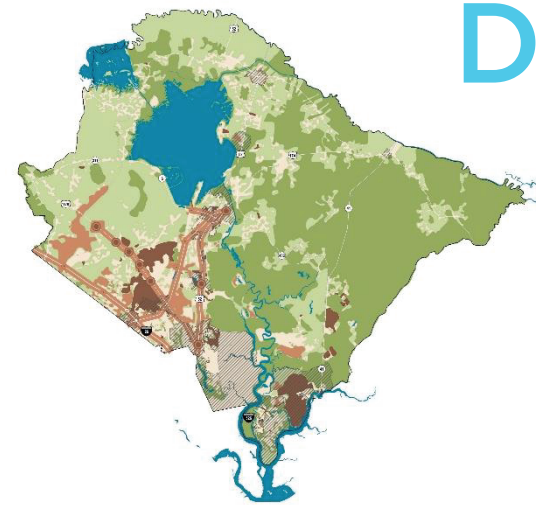
Population (2040)	399,000
Employment (2040)	134,500
Total Housing Units (2040)	154,000
New Development Footprint Context (2040)	
Rural Living	81%
Suburban Neighborhoods	43%
Suburban Centers	16%
Industrial Centers	32%
Mixed Use Centers	1%
New Home Construction Choices (2040)	
Single Family Detached	83%
Townhome, Duplex or Triplex	6%
Apartment or Condominium	11%
Commitment to Open Space	No Change
Increase in Development Footprint	+11,730 acres
Access to Amenities (2040)	
Homes within ½ Mile of Existing Parks	46%
Homes within ¼ Mile of Existing Transit	27%
Increased Infrastructure Needs (2040)	
New Road Centerline Miles	911
New Water Line Miles	960
New Sewer Line Miles	897
Financial Return on Investment Index	1.51



C

ACCELERATED TREND  
DEVELOPMENT

Population (2040)	468,000
Employment (2040)	134,500
Total Housing Units (2040)	181,500
New Development Footprint Context (2040)	
Rural Living	14%
Suburban Neighborhoods	44%
Suburban Centers	14%
Industrial Centers	27%
Mixed Use Centers	1%
New Home Construction Choices (2040)	
Single Family Detached	83%
Townhome, Duplex or Triplex	6%
Apartment or Condominium	11%
Commitment to Open Space	No Change
Increase in Development Footprint	+16,537 acres
Access to Amenities (2040)	
Homes within ½ Mile of Existing Parks	52%
Homes within ¼ Mile of Existing Transit	30%
Increased Infrastructure Needs (2040)	
New Road Centerline Miles	1,243
New Water Line Miles	1,292
New Sewer Line Miles	998
Financial Return on Investment Index	1.39



D

MANAGED GROWTH  
DEVELOPMENT

Population (2040)	468,000
Employment (2040)	134,500
Total Housing Units (2040)	181,500
New Development Footprint Context (2040)	
Rural Living	5%
Suburban Neighborhoods	52%
Suburban Centers	5%
Industrial Centers	34%
Mixed Use Centers	4%
New Home Construction Choices (2040)	
Single Family Detached	60%
Townhome, Duplex or Triplex	20%
Apartment or Condominium	20%
Commitment to Open Space	Big Increase
Increase in Development Footprint	+11,706 acres
Access to Amenities (2040)	
Homes within ½ Mile of Existing Parks	57%
Homes within ¼ Mile of Existing Transit	37%
Increased Infrastructure Needs (2040)	
New Road Centerline Miles	981
New Water Line Miles	1,076
New Sewer Line Miles	1,098
Financial Return on Investment Index	1.4x8