1984

2022

# Reality Check 2.0

**Collaborative Planning for Future Growth**
Berkeley-Charleston-Dorchester Region | South Carolina

**North Charleston** | **April 30, 2025**

BCDC⊗G
BERKELEY-CHARLESTON-DORCHESTER
COUNCIL OF GOVERNMENTS
PLANNING, PARTNERSHIP & PROSPERITY

ULI Urban Land Institute
South Carolina

Right now, a longtime resident is walking their neighborhood, hoping the changes they are seeing around them will honor the character and way of life they've come to cherish. A tourist strolling along King Street dreams of calling this region home. An industrial executive evaluates sites, envisioning new jobs and investment in a place poised for success. A parent looks to their child, hopeful for a future of opportunity and prosperity, right here in the Lowcountry. These aspirations illustrate the powerful energy propelling our region's growth.

Welcome to Reality Check 2.0. You are here because you are a leader—someone who has helped shape this region and will help guide its future. This event unites leaders from government, development, business, and the community to collaboratively plan for the region's growth and align priorities.

By 2045, our region is expected to grow by 270,000 residents, reaching a population of 1.2 million, alongside the creation of 140,000 new jobs. Reality Check 2.0 is our chance to come together, think strategically, and shape a plan that accommodates growth with sensitivity, in balance with the existing nature and community, while embracing a thriving and sustainable future.

Let's seize this opportunity to shape a future where our shared vision transforms challenges into lasting success. We appreciate your participation and are grateful for your commitment to building a better future together.
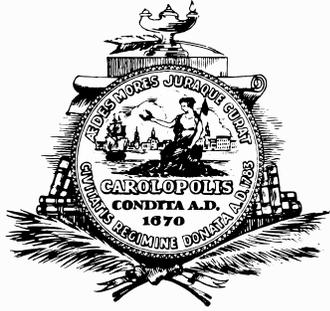
| **Ron Mitchum** | **Steve Dudash** | **Kerri Forrest** |
|:---:|:---:|:---:|
| Executive Director, BCDCOG | *Reality Check 2.0, Co-Chair* | *Reality Check 2.0, Co-Chair* |
| | ULI SC District Council Chair | Vice President of Grantmaking & Community Leadership, Coastal Community Foundation |
| | Director of Special Projects, Navy Yard Charleston | |

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# Contents

## About the cover

Between 1984 and 2022, Charleston faced major disruptions—Hurricane Hugo, the Navy Base closure, the Great Recession, and COVID-19. Yet, time and again, the region not only rebounded but thrived, experiencing unprecedented expansion and economic transformation, as evident in the satellite images on the cover. *(Photos/Google Earth)*

**Use the QR Code**
to explore an animated timeline of the satellite imagery of the region from 1984 to 2022 and other interactive data.

# What is Reality Check 2.0 ?

In 2007, a landmark event brought together 250 regional leaders to envision the future of the Berkeley-Charleston-Dorchester. Reality Check 2.0 continues this critical conversation, addressing the projected growth and the challenges and opportunities that come with it.

This exercise is a collaborative planning process designed to help our region come to a consensus on making informed, strategic decisions about accommodating growth. Participants from government, business, environmental organizations, and community groups will work together to explore ways to grow.

During this interactive session, you'll:
- Work at tables with regional leaders and stakeholders
- Use large-format regional maps
- Place Lego bricks representing jobs, housing, and infrastructure
- Explore different growth scenarios for our region
- Identify principles and strategies for sustainable development

Our goal is not to create a perfect plan, but to spark meaningful dialogue and find common ground. By bringing together diverse perspectives, we can develop a shared vision that:
- Preserves our region's unique natural and cultural resources
- Creates more connected, livable communities
- Supports economic development
- Reduces infrastructure costs
- Protects critical ecological networks

By participating in Reality Check 2.0, you're helping shape the future of our region. The choices we make today can help determine how we balance growth with economic opportunity, infrastructure needs, and environmental stewardship. With your insight and collaboration, we can build a shared vision that ensures a thriving, connected, and resilient region for generations to come.

Let's plan with purpose and grow by choice, not by chance.

## Photos from 2007

# Agenda

## Wednesday | April 30, 2025

**7:45am – 8:30am**    **Registration and Coffee**

**8:30am – 8:35am**    **Welcome by Mayor Reggie Burgess,** North Charleston

**8:35am – 8:45am**    **Introduction to Reality Check 2.0**
*Kerri Forrest, Coastal Community Foundation, Reality Check Co-Chair*
*Steve Dudash, Navy Yard Charleston, Reality Check Co-Chair*

**8:45am – 8:55am**    **Lowcountry Rapid Transit and Transit Oriented Development**
*Sharon Hollis, Principal Transit Planner, BCDCOG*

**8:55am–9:15am**    **The Region's Growth Story:** Where We've Been & Where We're Going
*Presenter: Kathryn Basha, Planning Director, BCDCOG*
*Presenter: Kendra Stewart, Director, Riley Center for Livable Communities*

**9:15am–9:45am**    **KEYNOTE:** *Tom Murphy, former Mayor of Pittsburgh, Urban Development Advisors LLC*
*Lessons learned from Pittsburgh*

**9:45am–9:55am**    **Rules of the Reality Check 2.0 Exercise**
*Presenter: Steve Dudash, Navy Yard Charleston*

**9:55am–12:15pm**    **Reality Check 2.0 Collaborative Planning Exercise**

**12:15pm–1:00pm**    **Lunch**

**1:00pm–1:45pm**    **Panel Discussion:**
Funding the Future – Creative Solutions for Major Infrastructure Investments
*Moderator: Josh Martin, City of Charleston*
*Panelist: Ed Crooks, HNTB, National Advisory Practice*
*Panelist: Fred Dodson Jr., COO/EVP, DreamKey Partners*
*Panelist: Nancy Whitworth, Economic Development Advisor, OneSpartanburg, Inc.*

**1:45pm–2:45pm**    **Morning Insights & Audience Engagement**
Presentation of the morning's findings and engagement of the audience
in refining regional priorities and determining next steps.
*Presenter: Tom Murphy, former Mayor of Pittsburgh, Urban Development Advisors LLC*

**2:45pm–3:15pm**    **From Vision to Action:** Turning Regional Priorities into Reality
*Presenter: Kerri Forrest, Coastal Community Foundation*
*Presenter: Steve Dudash, Navy Yard Charleston*

# Event day logistics

## Preparation before the day

- Please take at least 30 minutes to familiarize yourself with the data and concepts within this event guide prior to the event.
- This guide will inform you on the process, the rules, the details, and help the exercise go smoothly.
- You do not need to bring anything with you - all tools, food and beverages will be provided.
- Please wear comfortable business casual clothing and comfortable shoes.

## Where to park: Lot B

- Parking for this event is in **Lots B & C** at the North Charleston Coliseum. Enter via the ADA door to the right of the Coliseum Box Office to access the Montague Terrace.

## When you arrive:

### Morning Attendees

- Registration and coffee and will be offered from 7:45–8:30am at the East Montague Room inside the North Charleston Coliseum
- Participants should be registered and seated ready to begin the day at 8:30am.
- Please plan to arrive no later than 8:15am to allow time to park and get checked in.

### Afternoon Attendees

- Registration will occur between 11:45am–12:15pm in the corridor directly outside the East Montague Room. Afternoon attendees will be admitted into the East Montague Room at 12:15pm at the conclusion of the planning exercise and lunch will be served.
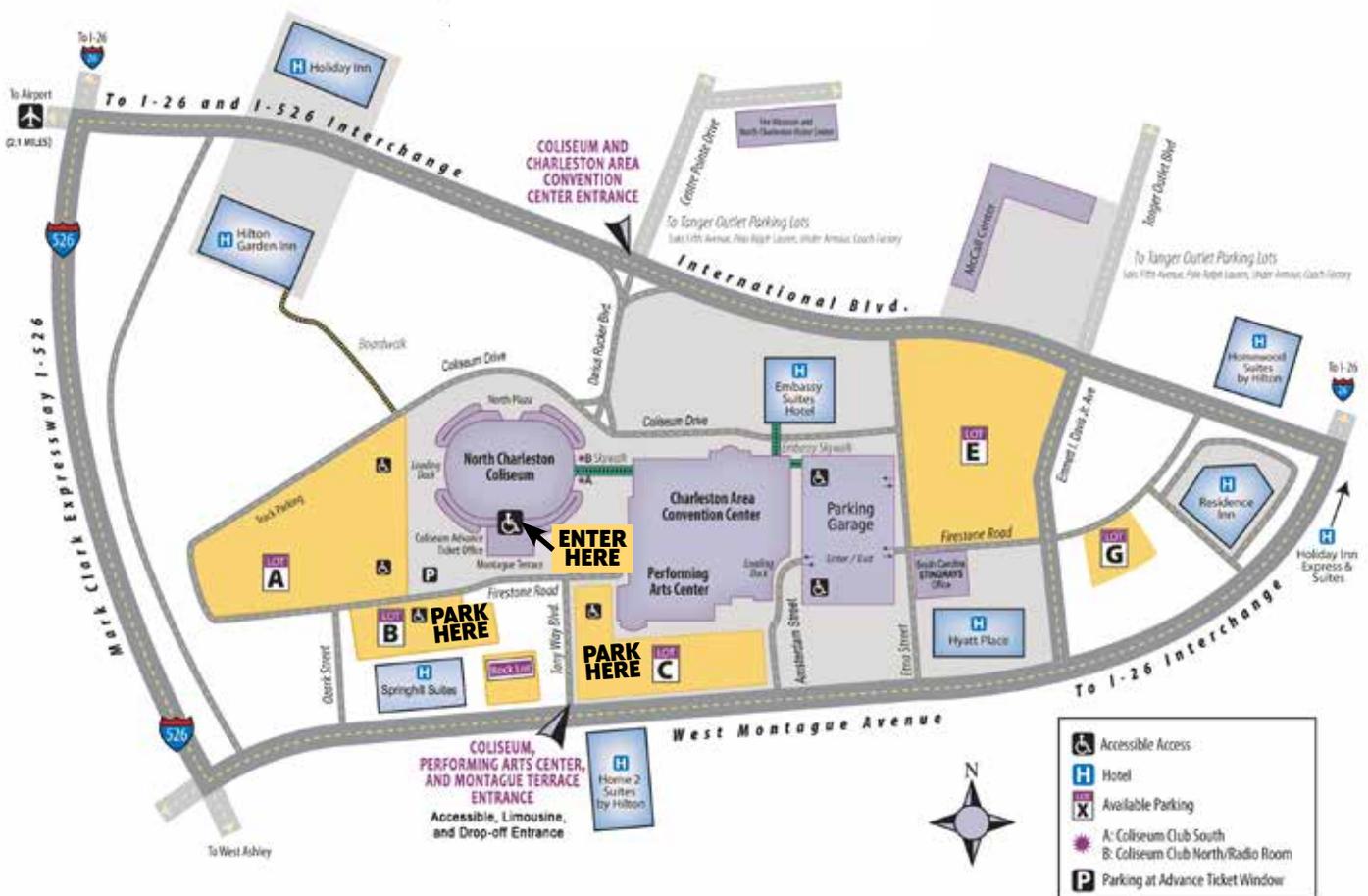
# Reality Check 2.0 speakers

Our speakers bring deep expertise in planning, development, and policy, offering valuable insights to guide today's discussions. Their leadership shapes communities and drives innovative solutions. We appreciate their time and contributions to Reality Check 2.0.

**Kathryn Basha**
*Planning Director*
*Berkeley-Charleston-Dorchester Council of Governments*

**Mayor Reggie Burgess**
*Mayor*
*City of North Charleston*

**Steve Dudash**
*Director of Special Projects*
*Navy Yard Charleston (Reality Check 2.0, Co-Chair)*

**Kerri Forrest**
*Vice President, Grantmaking and Community Leadership*
*Coastal Community Foundation (Reality Check 2.0, Co-Chair)*

**Sharon Hollis**
*Principal Transit Planner*
*Berkeley-Charleston-Dorchester Council of Governments*

**Kendra Stewart**
*Professor & Director*
*Riley Center for Livable Communities at the College of Charleston*

# Keynote Speaker: Tom Murphy
*Former Mayor of Pittsburgh,*
*Urban Development Advisors LLC*

Tom Murphy is the former Senior Resident Fellow at the Urban Land Institute (ULI) and served three terms as Mayor of Pittsburgh, from 1994 to 2005. His 45+ years of service reflect a deep commitment to urban revitalization, driven by strategic investment and visionary leadership. As mayor, Murphy led public-private partnerships that leveraged over $4.5 billion in economic development. He secured $1 billion to fund two professional sports stadiums and the nation's largest LEED-certified convention center. He also transformed more than 1,000 acres of abandoned industrial land into thriving mixed-use areas and developed over 25 miles of riverfront trails and green space.

Before his role as Senior Resident Fellow, Murphy served as ULI's Gulf Coast liaison, supporting recovery efforts in the aftermath of Hurricane Katrina across Louisiana, Mississippi, Alabama, and Florida. From 1979 to 1993, Murphy served eight terms in the Pennsylvania House of Representatives, where he focused on shifting the region's economy from industrial to entrepreneurial. He authored legislation to support venture capital investment, launch the Ben Franklin Technology Partnership, and promote land reuse and trail development.

Murphy also served in the Peace Corps in Paraguay and holds degrees from Hunter College and John Carroll University.
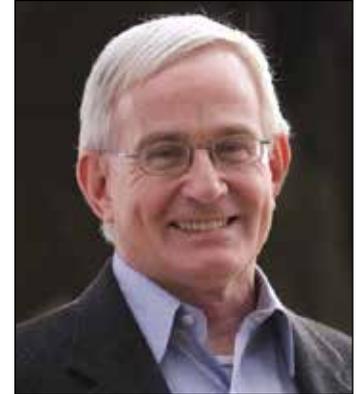
# Ed Crooks
*National Practice Consultant, HNTB*

Ed Crooks is an infrastructure development and finance professional, specializing in strategic infrastructure advisory, alternative delivery strategies and public-private partnerships (P3). Over the past 30+ years he has led and managed projects in a range of sectors, including highways, transit, rail, water and social infrastructure.

Ed is a Senior Vice President in HNTB's Advisory practice where he manages a team providing executive owners representative advice to senior client leaders seeking to deliver the biggest and most complex infrastructure projects and programs. This advisory practice focuses on helping public sector executives structure and deliver major programs and supports them with commercially sound program and project management expertise.

# Fred Dodson, Jr.
## COO/EVP, DreamKey Partners

Fred Dodson, Jr. has devoted his professional career to providing affordable housing. He is the Chief Operating Officer and Executive Vice President of DreamKey Partners, Inc., where he manages the organization's real estate development and construction activities. Before joining DreamKey in 1997, he gained experience directing the Hospitality House of Boone, a North Carolina homeless shelter, the New River Valley Habitat for Humanity Affiliate, and the Montgomery County Community Shelter in Virginia. He earned a Bachelor of Science in Psychology from Appalachian State University and a Juris Doctorate from the University of Tennessee College of Law. During his 27 years with DreamKey, he helped the organization grow its real estate portfolio from 400 to over 3,000 units. He has also led the organization in its geographic footprint to South Carolina and Georgia.

# Josh Martin
## Special Advisor, City of Charleston

Josh Martin, AICP, CNU-A, is a nationally recognized urban planner with over 23 years of experience spanning public, private, and nonprofit sectors. As Special Advisor to Charleston Mayor William Cogswell, he oversees projects in affordable housing, suburban retrofits, historic preservation, multimodal transit, and public-private partnerships.

Previously, Josh held leadership roles in Bluffton, Charleston, and Palm Beach, managing planning, zoning, and economic innovation efforts. He specializes in development review, master planning, and innovative zoning tools that balance public-sector administration with business-friendly redevelopment.

His work has been featured in *The New York Times, The Wall Street Journal*, and *Planetizen*. A lecturer at top universities, he remains active in CNU, APA, and ULI. Josh holds degrees from Wofford College and Clemson University and pursued a PhD at the University of Pennsylvania.

# Nancy P. Whitworth
*Economic Development Advisor,*
*OneSpartanburg, Inc.*

Nancy has been an economic development advisor with OneSpartanburg, Inc. since April, 2020 working with the team on urban and entrepreneurial development initiatives.

She retired after a long tenure with the City of Greenville, South Carolina serving as the director of economic development, deputy city manager and interim city manager and brought an entrepreneurial approach to public private partnerships resulting in Greenville's successful downtown and city-wide development. She was a partner in establishing NEXT, Greenville's entrepreneurial ecosystem, and was one of the founding board members. She has served on advisory services panels for the Urban Land Institute and International Economic Development Council and has been an expert panelist and presenter throughout the country advising communities on entrepreneurial and collaborative approaches to economic and community development.

She received her Bachelor of Arts and Master of Science degrees from Clemson University. She has served on numerous boards in the Greenville community and Clemson University, and is also a former South Carolina Department of Transportation Commissioner. Nancy has received numerous awards throughout her career including the Governor's Order of the Palmetto recognizing her exemplary vision, leadership and achievements in economic development.

# Thank You

Reality Check 2.0 would not have been possible without the generous contribution of time, knowledge, resources, and personal energy of the following people and organizations.

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## Reality Check 2.0, Co-chairs

Steve Dudash, *Navy Yard Charleston, Urban Land Institute – SC District Council Chair*

Kerri Forrest, *Coastal Community Foundation*

## Reality Check 2.0, Advisory Committee

Kathryn Basha, *Berkeley-Charleston-Dorchester Council of Governments*

Dorothea Bernique, *Increasing H.O.P.E.*

Scott Barhight, *Charleston Chamber*

Matt Brady, *Town of Mount Pleasant*

Daniel Brock, *HNTB*

Jason Brown, *Charleston Regional Development Alliance*

Adrian Cain, *Charleston Home Builders Association*

Abraham Champagne, *WSP*

Megan Clark, *Berkeley-Charleston-Dorchester Council of Governments*

Marie Delcioppo, *SMHa*

Josh Dix, *Charleston Trident Association of Realtors*

Robin Hargett, *Urban Land Institute*

Peter LaMotte, *Chernoff Newman*

Craig Logan, *Charleston Chamber*

Logan McVey, *City of Charleston*

Ali Moriarty, *Riley Center for Livable Communities at College of Charleston*

Kendra Stewart, *Riley Center for Livable Communities at College of Charleston*

Ryan Wilcox, *Berkeley-Charleston-Dorchester Council of Governments*
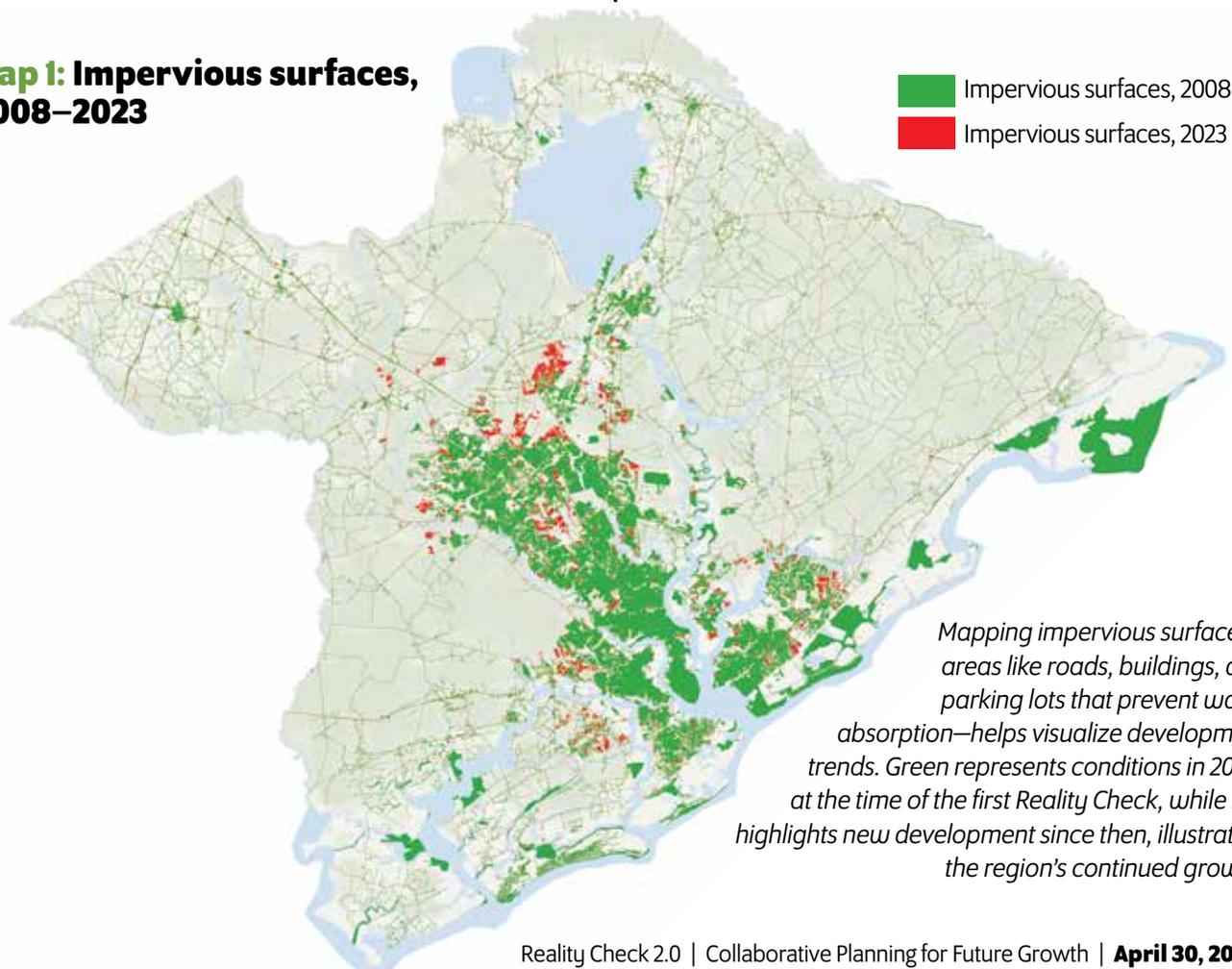
# *REALITY CHECK*
# *Revisted*

## Lessons from the past, choices for the future

When the last Reality Check was held in Dec. 2007, leaders left optimistic about their shared priorities *(see "Consensus guiding principles" on page 15)* and set out to implement their vision. However, they couldn't have predicted that Dec. 2007 would also mark the start of a recession, triggered by the collapse of the housing market, a subprime mortgage crisis, and the failures of major financial institutions.

While some initiatives from the first Reality Check took shape *(see "Vision to action" on page 15)*, many plans were sidelined as the real estate and development sectors fought to stay afloat and government revenues declined. What no one anticipated was the rapid population and economic growth that would soon follow.

**Map 1: Impervious surfaces, 2008–2023**



🟩 Impervious surfaces, 2008
🟥 Impervious surfaces, 2023

*Mapping impervious surfaces—areas like roads, buildings, and parking lots that prevent water absorption—helps visualize development trends. Green represents conditions in 2008, at the time of the first Reality Check, while red highlights new development since then, illustrating the region's continued growth.*

### Key drivers of regional growth

The recession officially ended in June 2009. Just a few months later, in Oct. 2009, Boeing announced it would build a final assembly and delivery facility for its 787 Dreamliner in North Charleston. This milestone jump-started economic activity and helped cement the region's reputation as a hub for advanced manufacturing. In the years that followed, global manufacturers like Mercedes-Benz Vans and Volvo also chose to invest in the region, adding to its growing manufacturing base. According to the U.S. Bureau of Economic Analysis, real GDP from manufacturing in the region grew from $3.0 billion in 2009 to $5.7 billion in 2023—a 90% increase.

The Port of Charleston is a major draw for manufacturing, warehousing, and distribution companies. SC Ports has expanded significantly with the opening of the Hugh Leatherman Terminal in 2021, the first new U.S. container terminal since 2009, and became the East Coast's deepest port at 52 feet after completing harbor deepening in 2022. Upcoming projects like the Navy Base Intermodal Facility and inner harbor barge system will further boost rail access and capacity.

The region's information technology and life sciences sectors have diversified and gained national traction. The information technology industry has grown beyond its early roots, while life sciences have surged, supported by an emerging innovation district anchored by the Medical University of South Carolina.

Not only did businesses begin to take note of the BCD region, travelers did as well. An already strong tourism industry was bolstered by accolades such as the readers of *Travel + Leisure* voting Charleston the number one city in the U.S. for the last twelve years in a row. According to the College of Charleston's Office of Tourism Analysis, the region welcomed 7.9 million visitors and tourism had a $13.1B economic impact in 2023.

In the wake of COVID-19, a combination of factors, including the rise of remote work and historically low interest rates, led many to reevaluate their priorities. The area's relative affordability compared to larger metros and quality of life became increasingly attractive, reinforcing ongoing population growth and accelerating regional demand. As a result, housing inventory declined rapidly while prices climbed sharply.

## From rural to residential

Since the last Reality Check in 2007, areas such as Nexton and Cane Bay have transitioned from rural landscapes to residential communities, adding thousands of homes and residents. This growth reflects broader regional trends in housing demand and land use changes. *(Photos/Google Earth)*

## The strain of rapid growth

While the region's growth has brought opportunity, it has also introduced challenges. Rapid population gains have placed pressure on housing, infrastructure, and natural resources. Rising home prices and limited inventory have strained affordability, leading many to seek housing farther out, fueling sprawl and increasing commute times. Infrastructure systems, from roads to stormwater drainage, are struggling to keep pace with new development. Additionally, not all communities have shared in recent economic growth, with some areas facing persistent income gaps and limited opportunities.

As the region continues to grow, it faces the challenge of balancing growth with forward-thinking planning and long-term resilience. Addressing these challenges is essential to the region's quality of life and economic vitality. Reality Check 2.0 offers a platform for leaders to align priorities and develop strategies to address the region's challenges and secure future success.

The following pages provide data on the region's growth and future projections, illustrating the mounting pressures that require attention, coordination, and action. ●



## Consensus guiding principles from Reality Check 2007

- Preserve the region's natural and cultural resources in all growth decisions.
- Develop live-work-play communities with diverse housing, jobs, and amenities.
- Expand access to affordable housing across the region.
- Promote urban infill and higher-density development along key corridors.
- Enhance transportation networks with multimodal options.
- Improve the balance of housing and jobs to reduce commute times.
- Foster regional collaboration to guide sustainable growth.

## From vision to action

The 2007 Reality Check laid the foundation for a regional vision that shaped critical growth decisions. It highlighted the need for coordinated planning and identified public transit as a key priority—ultimately paving the way for Lowcountry Rapid Transit.



**2007**
Reality Check identifies need for regional plan and mass transit.

**2012**
BCDCOG publishes "Our Region, Our Plan" envisioning the future of the region with a focus on transportation and transit.

**2016**
BCDCOG publishes "i-26ALT" which identifies Bus Rapid Transit as most viable public transit option.

**2019**
BCDCOG and LCRT project team begin participation in the Federal Transit Administration's (FTA) Capital Investment Grants (CIG) program. *Construction to begin 2027.*

# Understanding regional growth

As the region grows, its population, economy, and infrastructure are evolving in ways that impact affordability, transportation, and opportunity. The following data highlights key trends influencing long-term prosperity.

**Scan the QR code** to access additional interactive maps and data that provide deeper insights into regional growth trends.

## Population growth

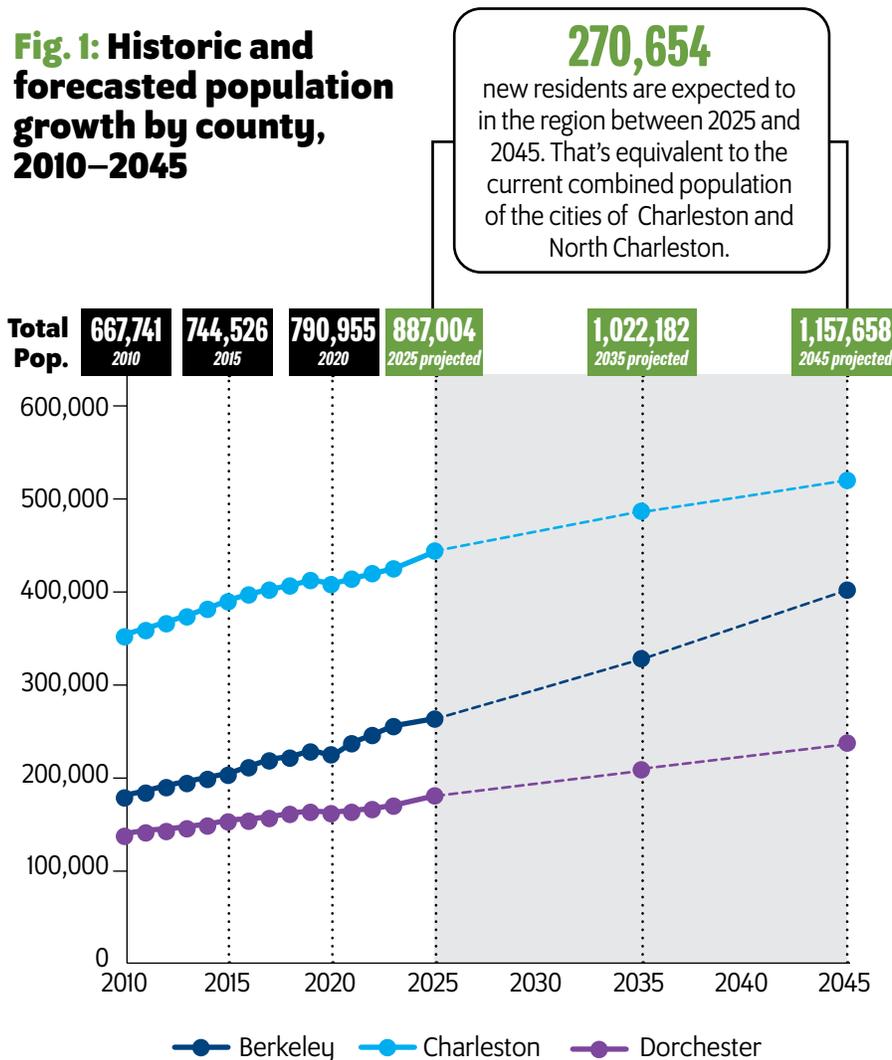**Fig. 1: Historic and forecasted population growth by county, 2010–2045**

**270,654** new residents are expected to in the region between 2025 and 2045. That's equivalent to the current combined population of the cities of Charleston and North Charleston.

| Total Pop. | 667,741 2010 | 744,526 2015 | 790,955 2020 | 887,004 2025 projected | 1,022,182 2035 projected | 1,157,658 2045 projected |
|---|---|---|---|---|---|---|



Berkeley — Charleston — Dorchester
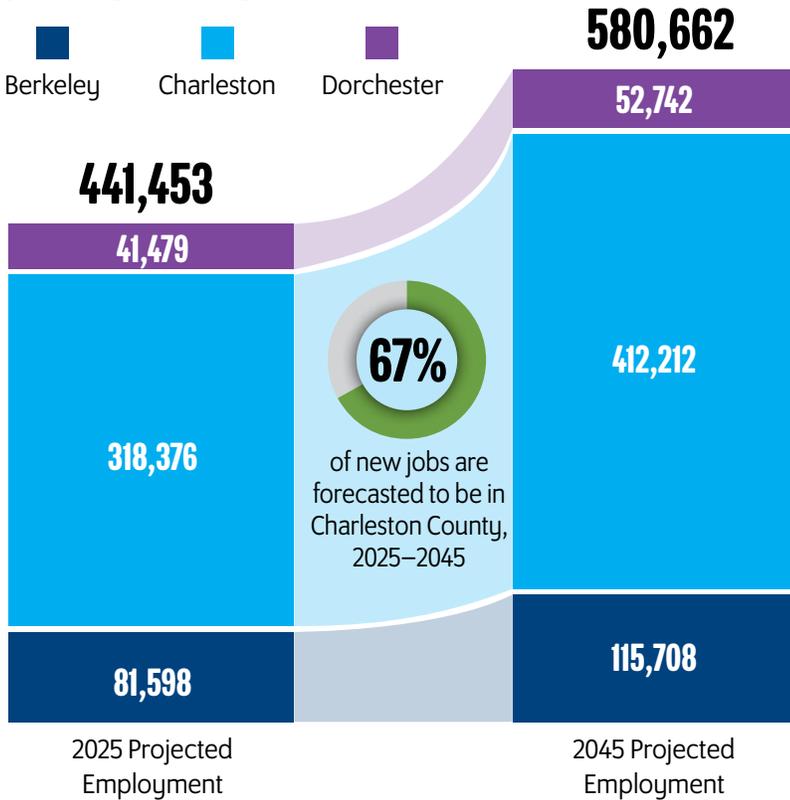
**Fig. 2: Forecasted population growth by county, 2025–2045**

Berkeley County is forecasted to grow by more residents than Charleston and Dorchester Counties combined between 2025 and 2045.

**137,880**

**132,774**

57,093

75,681

Berkeley  Charleston  Dorchester
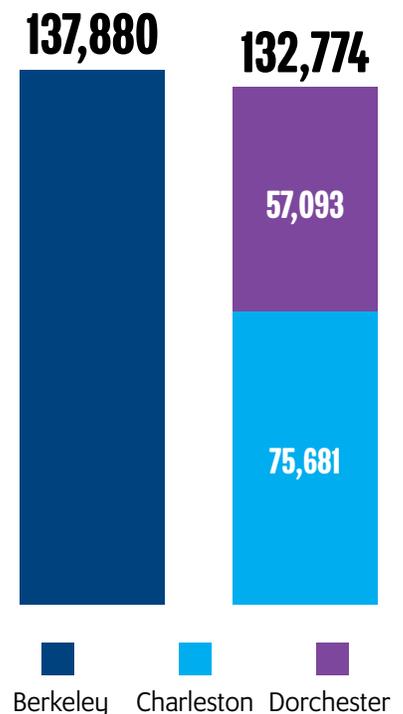
*Sources: U.S. Census Bureau, 2023 ACS, 1-Year Estimates and BCDCOG Travel Demand Model*

# Employment growth

**Fig. 3:** **Forecasted growth of jobs by county, 2025–2045**

Berkeley　　Charleston　　Dorchester

**580,662**

**441,453**

52,742

41,479

412,212

318,376

**67%** of new jobs are forecasted to be in Charleston County, 2025–2045

115,708

81,598

2025 Projected Employment

2045 Projected Employment

*Source: BCDCOG Travel Demand Model*

From 2025 to 2045, **Berkeley County** is forecasted to account for **51% of the region's population growth**, while **Charleston County** will see **67% of new job growth**.

**Map 2: Population density, 2023**



Population Density Per Sq Mile
- 0-50
- 50-100
- 100-500
- 500-1000
- 1000-2500
- >2500

**Map 3: Employment density, 2023**



JOBS Per SQ Mile
- 0-25
- 25-100
- 100-500
- 500-1000
- 1000-2500
- >2500
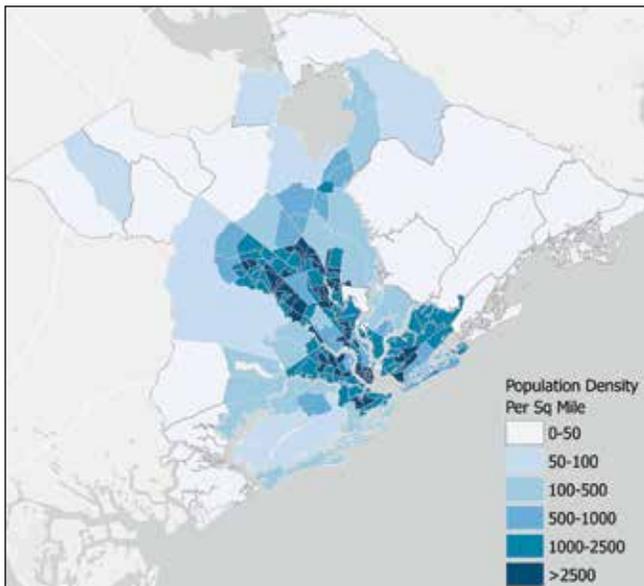
*Source: U.S. Census Bureau, 2023 ACS, 5-Year Estimates*
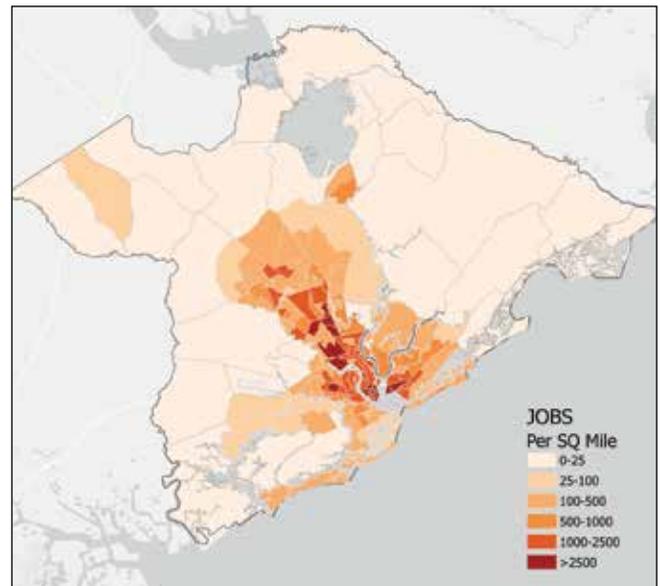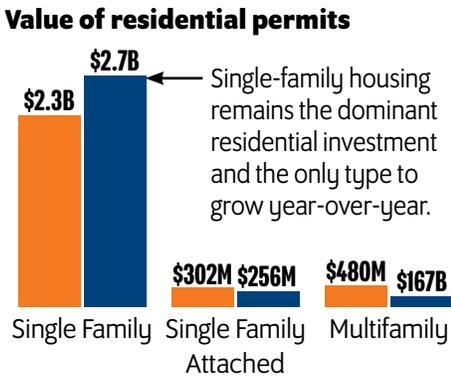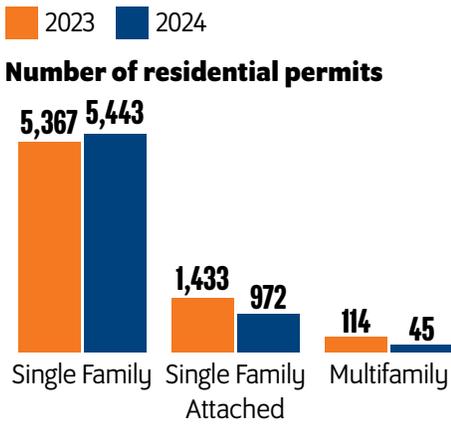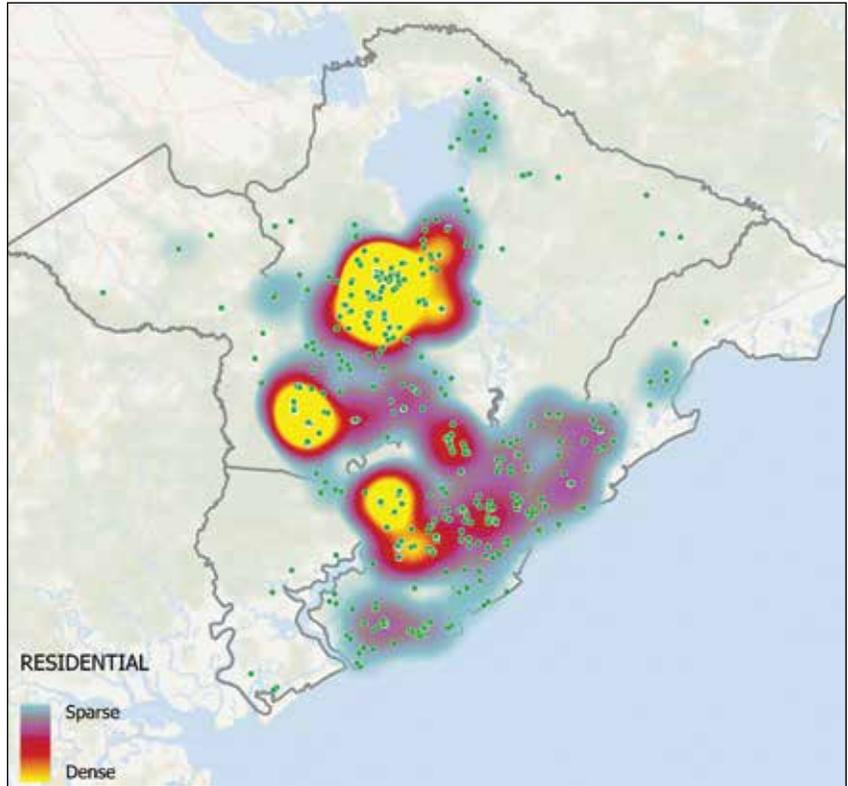
# Building permits

Examining where new buildings are approved helps predict future development patterns. Maps 4 and 5 align with the forecasts on the previous pages, showing the highest concentration of residential building permits in Berkeley County, while Charleston County leads in commercial development, where jobs will be located.

## Fig. 4: Number and value of building permits, 2023-2024

■ 2023  ■ 2024

**Number of residential permits**

| | 2023 | 2024 |
|---|---|---|
| Single Family | 5,367 | 5,443 |
| Single Family Attached | 1,433 | 972 |
| Multifamily | 114 | 45 |

**Value of residential permits**

| | 2023 | 2024 |
|---|---|---|
| Single Family | $2.3B | $2.7B |
| Single Family Attached | $302M | $256M |
| Multifamily | $480M | $167B |

← Single-family housing remains the dominant residential investment and the only type to grow year-over-year.

**Commercial permits**

| | 2023 | 2024 |
|---|---|---|
| Number | 1,019 | 862 |
| Value | $1.4B | $2.0B |

*Source: BCDCOG*

## Map 4: Residential building permits, 2024



RESIDENTIAL
Sparse
Dense

## Map 5: Commercial building permits, 2024



COMMERCIAL
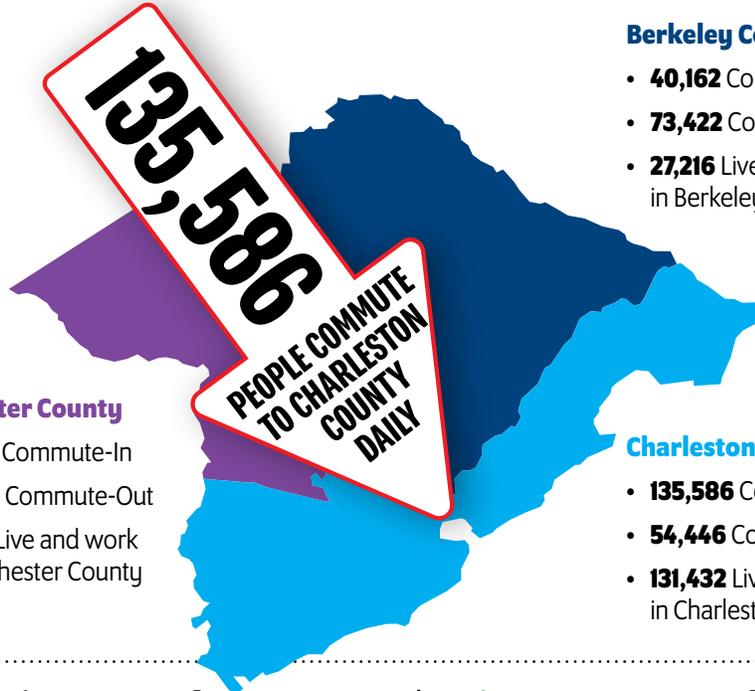Sparse
Dense
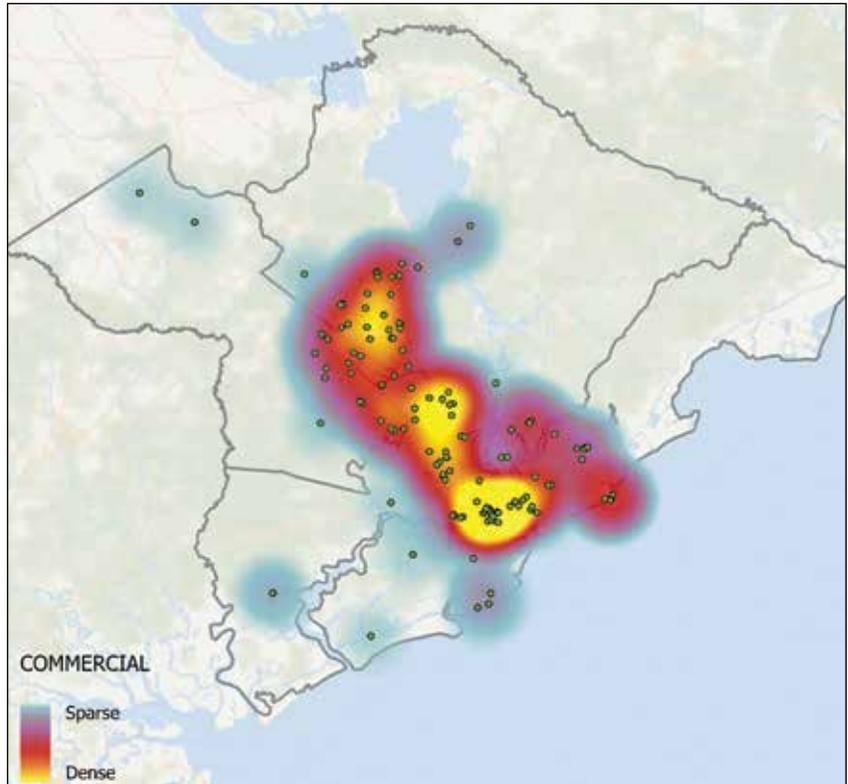
# Commuting patterns

The region's transportation network was designed primarily for cars. As the population grows and development extends outward, increased car volumes strain infrastructure and mobility.

## Fig. 5: Commuter flows by county, 2022

Charleston County has the region's highest job concentration and highest housing costs, pushing many workers to live farther away where housing is more affordable. As a result, more people face longer commutes, increasing regional traffic and stresses on transportation infrastructure.

*Source: U.S. Census, OnTheMap*

**135,586 PEOPLE COMMUTE TO CHARLESTON COUNTY DAILY**

**Berkeley County**
- **40,162** Commute-In
- **73,422** Commute-Out
- **27,216** Live and work in Berkeley County

**Dorchester County**
- **22,657** Commute-In
- **58,346** Commute-Out
- **15,199** Live and work in Dorchester County

**Charleston County**
- **135,586** Commute-In
- **54,446** Commute-Out
- **131,432** Live and work in Charleston County

## Fig. 6: Means of transportation to work, BCD Region, 2010-2023

■ 2010  ■ 2023

**Drove alone**
90.7%
83.1%

**Public transportation (excluding taxicabs)**
1.2%
0.6%

**Walked or Bicycle**
3.3%
2.2%

**Worked at home**
3.7%
12.9%

COVID-19 led to a surge in remote work, and while the trend has declined from its peak, it remains nearly four times higher than in 2010.

*Source: U.S. Census Bureau, ACS, 5-Year Estimates*

## Fig. 7: Mean travel time (minutes) to work by county, 2010-2023

■ 2010  ■ 2023

Longer commutes strain infrastructure, increase congestion, and reduce time for work, family, and leisure.

| | Berkeley | Charleston | Dorchester |
|---|---|---|---|
| 2010 | 26.3 | 22.3 | 27.9 |
| 2023 | 29.1 | 24.9 | 31.0 |
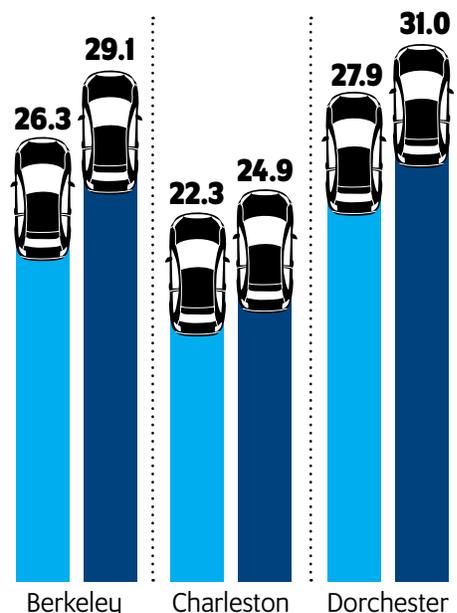
# Housing supply, affordability and growth

Rising home prices and limited inventory are putting pressure on affordability, especially in Charleston County. As prices increase, more people are turning to Berkeley and Dorchester counties for more affordable options, driving suburban growth and increasing the need for regional planning, transportation, and infrastructure development to accommodate this expansion.

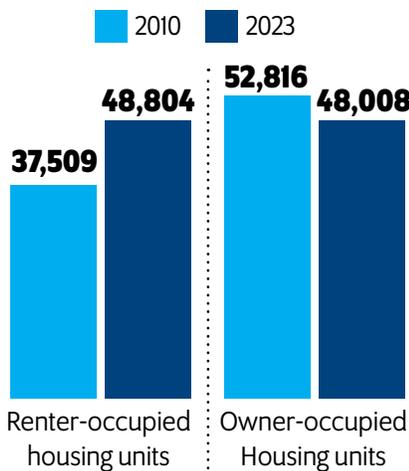## Fig. 9: Inventory of single family homes for sale by county, 2014–2024
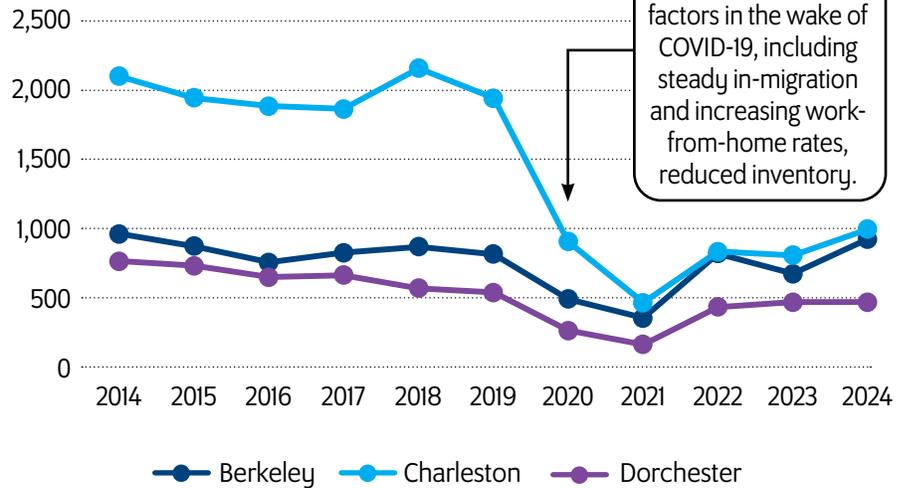
**Effect of COVID-19 on inventory**

A combination of factors in the wake of COVID-19, including steady in-migration and increasing work-from-home rates, reduced inventory.

Berkeley — Charleston — Dorchester

*Note: Data is from December of each year.*
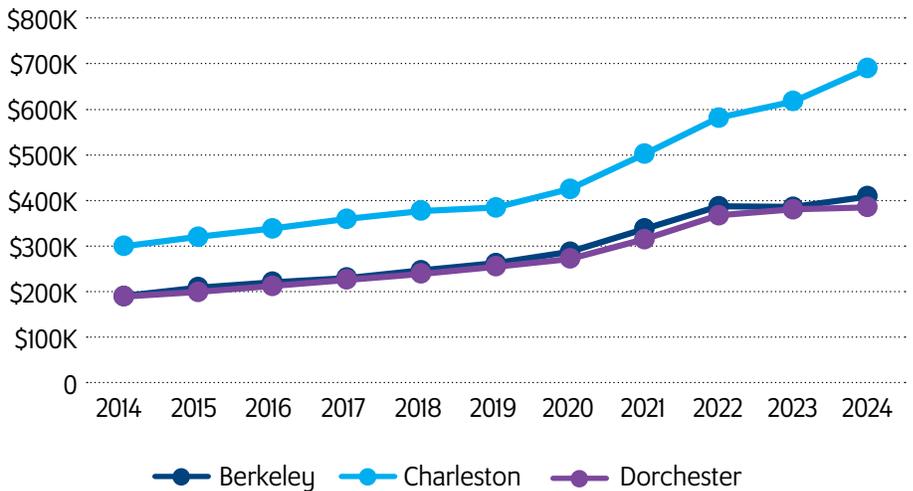*Source: Charleston Trident Association of Realtors*

## Fig. 8: Number of cost-burdened households in the BCD Region, 2010–2023

Median rent grew by 90.2% from 2010–2023, while the median monthly costs for owners with a mortgage rose by 28.7%. These rising costs contribute to the growing number of cost-burdened households in our region.

2010   2023

Renter-occupied housing units: 37,509 (2010), 48,804 (2023)
Owner-occupied Housing units: 52,816 (2010), 48,008 (2023)

*Source: U.S. Census Bureau, ACS, 5-Year Estimates*

## Fig. 10: Median sales price of single family homes by county, 2014–2024

Berkeley — Charleston — Dorchester

**115%** increase in median sales price, **Berkeley County**, 2014-2024

**130%** increase in median sales price, **Charleston County**, 2014-2024

**104%** increase in median sales price, **Dorchester County**, 2014-2024

*Source: Charleston Trident Association of Realtors*

# Developing transit corridors

As the region grows, developing around transit corridors offers a key opportunity. Transit-Oriented Development (TOD) creates walkable, mixed-use communities that enhance transit access while reducing congestion. By placing housing, jobs, and services near transit, TOD boosts ridership and economic vitality. Intentional policies can guide TOD growth, fostering well-connected, vibrant neighborhoods along transit corridors like Lowcountry Rapid Transit (LCRT).



*(Illustration/BCDCOG)*

## Key TOD Features:

√ **High-intensity, mixed-use development** near transit stations

√ **Higher-density housing options** to support walkability and transit use

√ **Pedestrian-friendly** streetscapes with buildings oriented toward sidewalks

√ **Multimodal street networks** for safe walking, biking, and transit access

√ **Managed parking** strategies to reduce land consumption

√ **Parks and open spaces** integrated into development

√ **Supportive policies** that align zoning, infrastructure, and investment with TOD goals
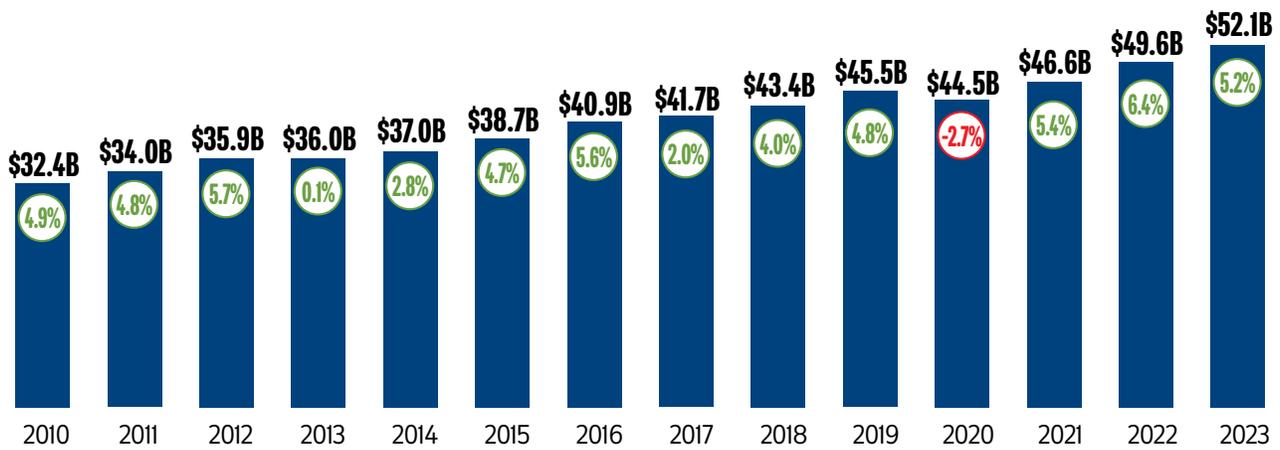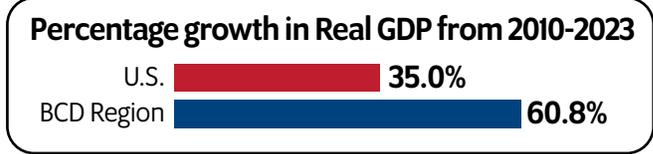
## Map 6: Lowcountry Rapid Transit



*Lowcountry Rapid Transit (LCRT) will be the region's first bus rapid transit system, spanning 21.3 miles. With frequent service, dedicated lanes, and modern amenities, LCRT will connect communities, key destinations, and job centers while improving mobility with park-and-rides, pedestrian access, and real-time updates. (Rendering and map/BCDCOG)*

# Economic growth and shared prosperity

The BCD Region has experienced remarkable economic momentum, with Real GDP growing 60.8% between 2010 and 2023—far outpacing national growth. Major announcements from Boeing, Volvo, and Mercedes-Benz Vans have helped fuel this expansion. Yet, as the economy has grown, not all communities have shared in the prosperity.

**Fig 11: Real GDP and percentage change for BCD Region, 2010-2023**
*(Chained 2017 dollars)*

**Percentage growth in Real GDP from 2010-2023**

| | |
|---|---|
| U.S. | 35.0% |
| BCD Region | 60.8% |



| Year | Real GDP | % change |
|---|---|---|
| 2010 | $32.4B | 4.9% |
| 2011 | $34.0B | 4.8% |
| 2012 | $35.9B | 5.7% |
| 2013 | $36.0B | 0.1% |
| 2014 | $37.0B | 2.8% |
| 2015 | $38.7B | 4.7% |
| 2016 | $40.9B | 5.6% |
| 2017 | $41.7B | 2.0% |
| 2018 | $43.4B | 4.0% |
| 2019 | $45.5B | 4.8% |
| 2020 | $44.5B | -2.7% |
| 2021 | $46.6B | 5.4% |
| 2022 | $49.6B | 6.4% |
| 2023 | $52.1B | 5.2% |

*Source: Bureau of Economic Analysis*

## Fig. 12: Median household income, 2010–2023

**BCD Region surpasses U.S.**

In 2017, the BCD Region's median household income ($57,666) surpassed the U.S. ($57,652), a gap that has only increased.
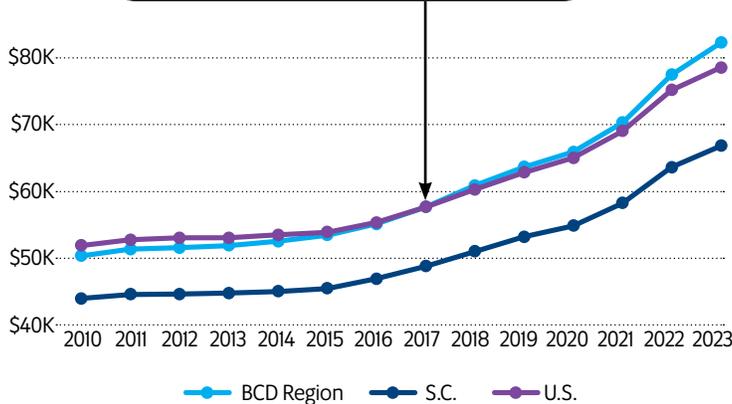


BCD Region • S.C. • U.S.

*Source: U.S. Census Bureau, ACS, 5-Year Estimates*

## Fig. 13: Low-to-moderate-income by Census Tract, 2020



LMI %
- <50%
- 50-65%
- 65-75%
- 75-85%
- 85-99%
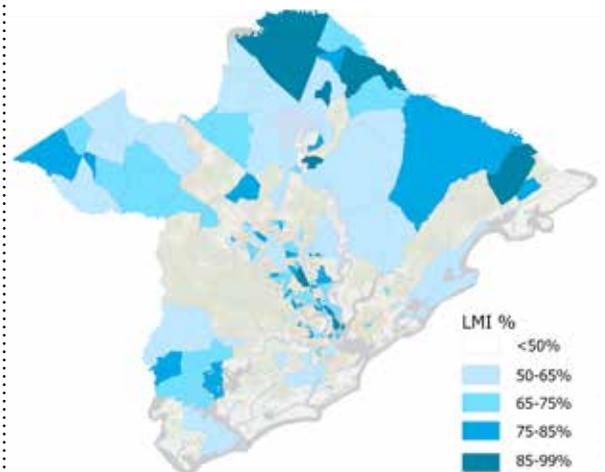
*Source: U.S. Dept. of Housing and Urban Development*

# Growth and water

The BCD Region's rapid growth is colliding with rising flood risks. Increased coastal and rainfall-driven flooding, outdated or restricted drainage systems, and development in vulnerable areas all amplify the threat. Compound flood events are becoming more frequent and severe, particularly in low-lying communities. These overlapping challenges jeopardize both established and new neighborhoods, underscoring the urgent need for planning, resilient infrastructure, and thoughtful development to protect the region's long-term prosperity.

**Fig 14: Number of major flood events in Charleston Harbor, 1990-2024**
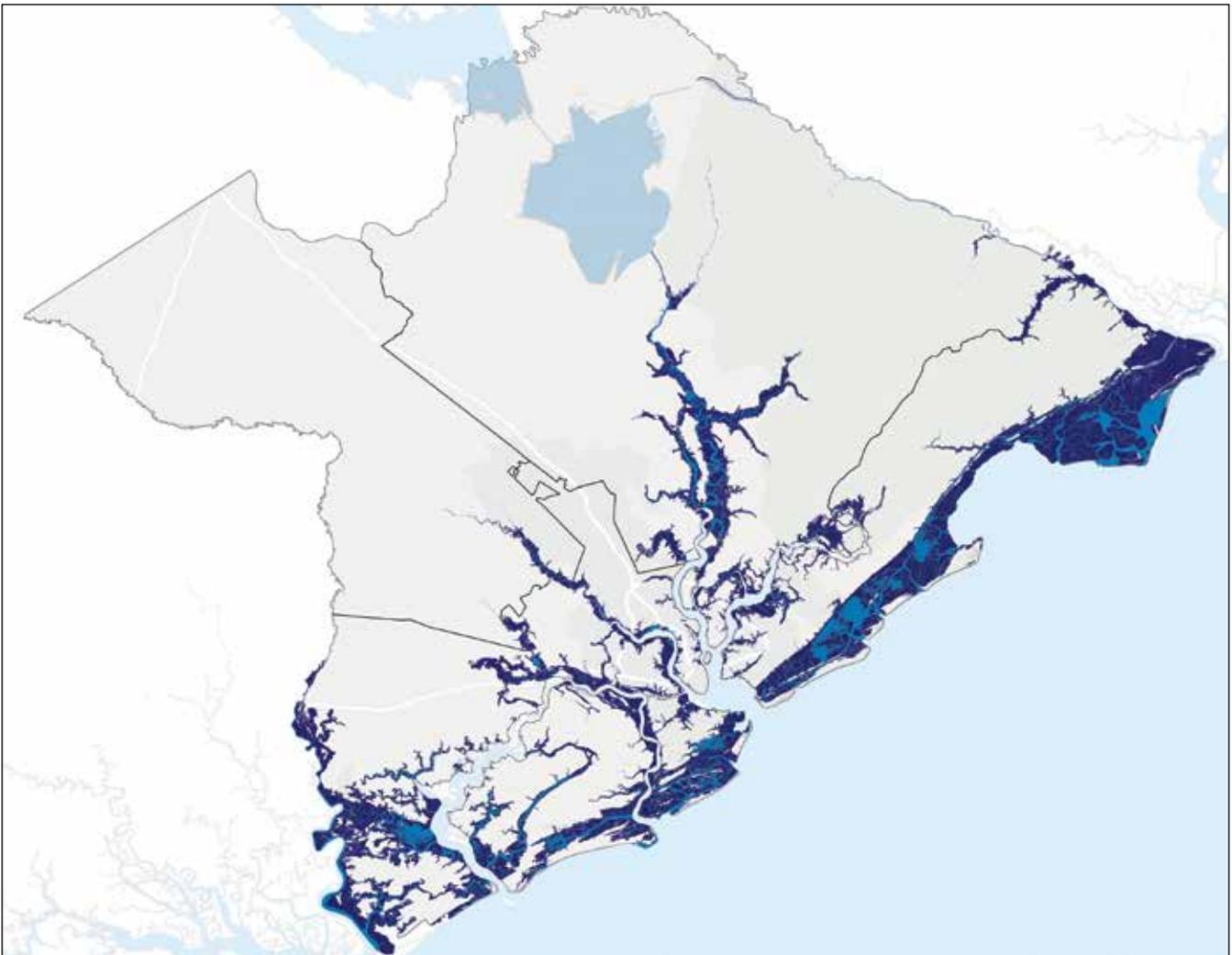
8.0 ft MLLW* is the Major flood threshold.

**Decadal trends - events per year**

| | |
|---|---|
| 1990-1999 | 0.1 |
| 2000-2009 | 0.3 |
| 2010-2019 | 1.6 |
| 2020-2024 | 4.6 |

*\* MLLW - Mean Lower Low Water is the average lower low water height during the National Tidal Datum Epoch.*
*Source: National Weather Service, Coastal Flood Event Database*

## Map 7: Impact of 1-foot sea level rise



*Climate models from NOAA and others project 13 to 16 inches of sea-level rise by 2050. This map uses NOAA's 1-foot rise scenario to reflect these projections and help visualize future coastal risk.(Map/BCDCOG)*

# The Exercise


*Reality Check 2007.*

## The exercise and visioning process

Each participant will be assigned to a table with a wide-ranging group of ten people from the Berkeley-Charleston-Dorchester (BCD) region. The goal will be to plot where future growth through 2045 should go – transportation corridors, jobs, housing, and green space. The 6' X 5' map of the BCD region shows major roadways, protected land, waterways, and municipalities. The map is gridded, with each grid cell equaling two-square miles. The map does NOT include jurisdictional lines, counties or municipalities.

Each table's game pieces include a set of colored Lego bricks to allocate projected densities, two colored spools of ribbon to identify transit/road corridors (new or enhanced) and green ribbon to identify new conservation areas.

## Facilitator & scribe roles

Each table will be assigned a facilitator and a scribe. Your facilitator, trained to guide an objective process, will lead the exercise, facilitate discussion, answer questions, clarify decisions for the scribe, and summarize the group's progress and outcomes. The scribe will document your comments, observations, and recommendations throughout the exercise.

## Exercise rules

√ **The growth projections are not negotiable.** While any projection could be debated, the Reality Check 2.0 Advisory Committee agrees these are reasonable estimates for the region's growth and warrant proactive planning.

√ All growth allocations are additive, that is, the growth that you are allocating must be considered as an addition to what already exists.

√ All of the projected growth represented by Lego bricks must be allocated before the end of the exercise.

## Visioning process rules

√ **Listen to others, Everyone has an equal voice.** This is an exercise in collective decision-making. Acknowledge that every participant has a valid perspective from which you can learn. No one should dominate the discussion.

√ **Think big.** Remember that this is a regional exercise with a tight time line. Visioning is intended to be broad. Avoid getting bogged down in too much specificity at a local level.

√ **Keep an open mind.** Don't discount any ideas without discussing and evaluating them. Build upon each other's ideas in a positive way.

√ **Be bold and creative.** Explore innovative ideas that challenge the status quo and inspire new possibilities for the region's future.

## Exercise guide

You will have about 2.5 hours to complete this exercise. Each group should address the issues below, in the following order:

### 1. Guiding principles (30-minute discussion):

Guiding principles are key priorities that shape growth and development, ensuring a thriving community for residents and visitors alike. Your facilitator will lead the discussion and capture insights on the easels provided. Examples include:

√ Preserve green spaces, adjacent natural areas, and environmentally sensitive areas

√ Preserve agricultural land

√ Preserve water resources and quality

√ Maintain access to recreation including beaches as well as urban recreation areas

√ Link transportation and cultural & recreational activities

√ Increase urban density to preserve open spaces

√ Develop/expand mass transit to direct future growth and reinforce current growth

√ Develop higher density near multi-modal transportation

√ Give careful consideration to future growth in high-hazard coastal areas

√ Create a collection of distinct communities and neighborhoods connected by efficient transportation

√ Reinvest in existing urban centers and infrastructure

√ Support mixed use, pedestrian friendly, and transit oriented development

√ Create new major business centers

√ Create a balance between jobs and housing

### 2. Lego bricks and ribbon allocations (90-minutes):

Using your group's guiding principles and game pieces, plan where growth should occur, what it should include—housing, jobs, or mixed-use—and the density for each area.

√ **Lego bricks:** Yellow bricks represent households (residential) while red bricks represent commercial/jobs (non-residential). Mixed-use clusters are created by stacking the yellow and red bricks. Please refer to pages 26-30 for additional information.

√ **Ribbon:** Place black and/or orange ribbon on the map to indicate the group's preferences for accommodating the increased traffic flow through the region. Green ribbon will be placed to indicate new green space, parks or green ways. Please refer to page 26 for additional information.

> *Black Ribbon = Roads*
> *Orange Ribbon = Transit/Bus Rapid Transit*
> *Green Ribbon = Greenways and green space*

### 3. Review. Adjust. Summarize (30-minutes):

√ Review and finalize your development scenario. Your facilitator will move you through a discussion of the implications your scenario will have on the region as a whole.

√ Give your development scenario a descriptive title.

√ How well did you adhere to your guiding principles? How did your table address housing and job distribution, environmental protection, transportation, and new or expanded corridors? Did you incorporate transit effectively? Do you need to adjust your scenario to better align with your guiding principles?

√ Evaluate your development scenario, determine the one or two geographic areas essential to the success of your scenario.

√ List your transportation solutions.

# The projected regional growth, 2025-2045

| 102,000 | 140,000 | 270,000 |
| --- | --- | --- |
| **More households** | **More jobs** | **New people** |

# Representing projected growth on the map

*Each grid cell on the map equals 2 square miles, or 1280 acres*

## = Households

**Each yellow Lego**
equals 640 households, or ½ per acre.

**Each table**
has 160 yellow Lego bricks, for a total of 102,000 new households.

| No. of Legos | No. of Households | Household Density | Households Per Acre |
| --- | --- | --- | --- |
| 1 | 640 | Very Low | 0.5 |
| 8 | 5,120 | Low/Medium | 4 |
| 16 | 10,240 | Medium | 8 |
| 30 | 19,200 | Medium/High | 15 |
| 48 | 30,720 | High | 24 |

## = Jobs

**Each red Lego**
equals 640 jobs, or ½ per acre.

**Each table**
has 219 red Lego bricks, for a total of 140,000 new jobs.

| No. of Legos | No. of Jobs | Job Density | Jobs Per Acre |
| --- | --- | --- | --- |
| 1 | 640 | Very Low | 0.5 |
| 12 - 23 | 7,680 - 14,720 | Low | 6 - 11.5 |
| 24 - 47 | 15,360 - 30,080 | Medium | 12 - 23.5 |
| 48 - 99 | 30,720 - 63,360 | High | 24 - 49.5 |
| 100+ | More than 64,000 | Very High | +50 |

**Black Ribbon = Roads**
Represents new or expanded regional roadways, including highways, widened roads, and new corridors.

**Orange Ribbon = Transit/Bus Rapid Transit**
Identifies new regional transit corridors, whether within existing roads or dedicated routes.

**Black & Orange Ribbons = Shared Transportation Corridors**
Indicates corridors combining roadways and transit, such as Bus Rapid Transit alongside roadway enhancements.

**Green Ribbon = Greenways and Green Space**
Marks new parks, greenways, or wildlife corridors, including connections between existing green spaces.

***Note:*** *If removing existing roadways, please document these changes in your transportation improvements list.*

# Understanding the region's current household and job density

As you engage in the planning exercise, you'll see how density plays a crucial role in managing growth while preserving land. The maps below illustrate the region's existing household and employment density patterns.

Household density is highest on the historic peninsula, where development predated the automobile and prioritized compact, mixed-use neighborhoods. In contrast, suburban expansion in recent decades has favored lower-density, single-family housing, leading to greater land consumption and increased strain on transportation and infrastructure networks.

Employment density follows a similar pattern, with the urban core hosting major institutions like MUSC and the College of Charleston. North Charleston's industrial hubs, including Boeing and Palmetto Commerce Park, serve as key employment centers, while emerging nodes like Camp Hall Industrial Park in Berkeley County—home to Volvo and Redwood Materials—are driving new job growth.

## Visualization of job density, 2023



## Visualization of population density, 2023
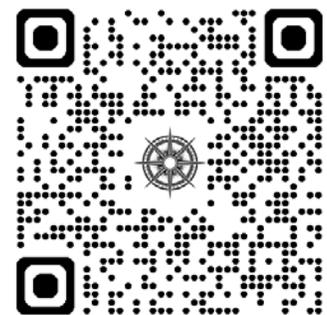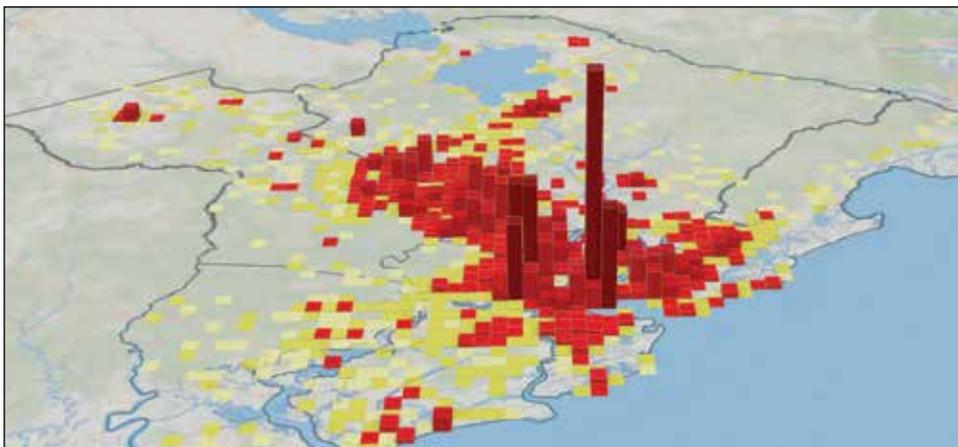




**Scan the QR code for an immersive 360° view of these visualizations of population and job density.**
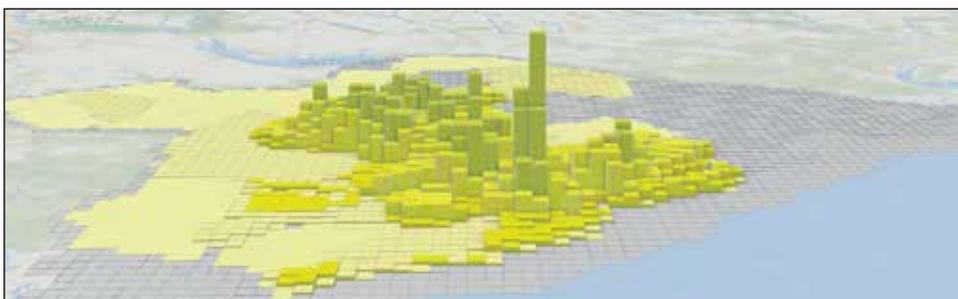
# Household density visualization



**Low Density**
3 Legos
1.5 HH per Acre
1,920 HH/Two-square miles



**Medium Density**
12 Legos
6 HH per Acre
7,680 HH/Two-square miles



**Medium/High Density**
24 Legos
12 HH per Acre
15,360 HH/Two-square miles



**High Density**
42 Legos
21 HH per Acre
26,880 HH/Two-square miles

# Job density visualization



**Very Low Density**
3 Legos
1.5 Jobs per Acre
1,920 Jobs/Two-square miles



**Low/Medium Density**
12 Legos
6 Jobs per Acre
7,680 Jobs/Two-square miles

**Medium Density**
24 Legos
12 Jobs per Acre
15,360 Jobs/Two-square miles

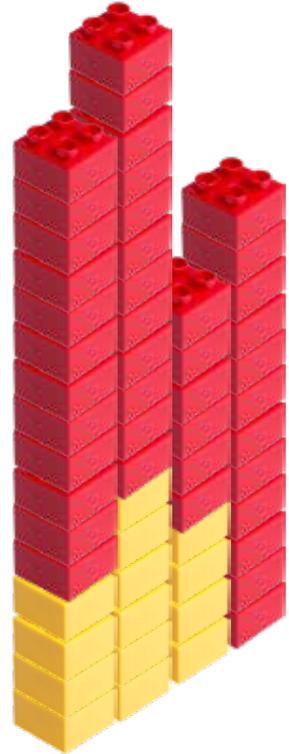**High Density**
51 Legos
25.5 Jobs per Acre
32,640 Jobs/Two-square miles

# Mixed-use density visualization



### Employment-centered mixed-use development

Employment-centered mixed-use focuses on creating job hubs while incorporating residential spaces. Examples include office towers and innovation centers with ground-floor restaurants and services. Residential components help reduce commutes and add vitality during off-hours. This approach enhances economic productivity and fosters ongoing activity throughout the day.



### Residential-centered mixed-use development

Residential-centered mixed-use prioritizes housing while integrating businesses that serve the neighborhood. Higher-density housing options, such as apartments and condominiums, provide a built-in customer base for businesses. Markets, restaurants, and services create walkable destinations, reducing reliance on cars and encouraging community interaction.
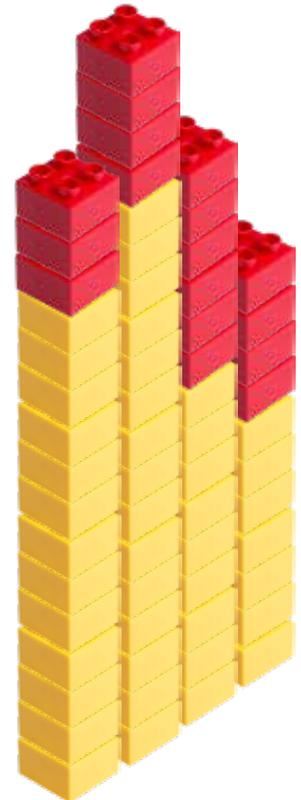
# Shaping our future together

Thank you for your participation in Reality Check 2.0. The collaborative spirit demonstrated will be essential to implementing the priorities and principles we've established together. The future of our region depends not just on the vision we've created, but on our continued commitment to turning these ideas into reality.

The challenges we face are significant, but so are our opportunities. By working together across jurisdictional boundaries, we can create a region that grows by choice, not by chance—preserving what makes this region special while embracing a vibrant and sustainable future.

## Stay connected and engaged

The conversation doesn't end today—it's just beginning. In the coming weeks, we'll be sharing detailed outcomes from today's exercise, announcing implementation plans, and scheduling follow-up presentations across the region. Here are ways to stay involved:

- **Request Reality Check 2.0 presentations**
  If you would like information about Reality Check 2.0 presented to your board, council or other constituents, please contact Ryan Wilcox at ryanw@bcdcog.com.

- **Amplify the conversation on social media**
  Continue to use the hashtag **#RealityCheckBCD** when sharing insights, progress, and implementation efforts related to today's event.

- **Incorporate the guiding principles into local plans**
  Take the Reality Check 2.0 consensus principles back to your jurisdictions and incorporate them into your comprehensive plans, zoning ordinances, and capital improvement programs. Aligning your community's plans with these shared principles will create cohesive growth patterns across our region.
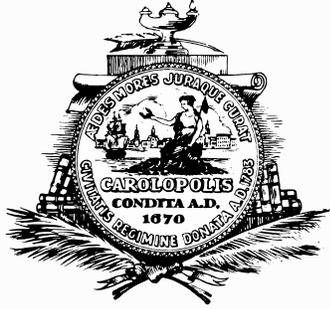
**Have ideas to share? Questions about getting involved? Want to schedule a presentation for your organization?**
Contact Ryan Wilcox at
ryanw@bcdcog.com or 843-529-2709

**Scan the QR code** to continue accessing the interactive maps and data. Exercise results and implementation updates will be added.