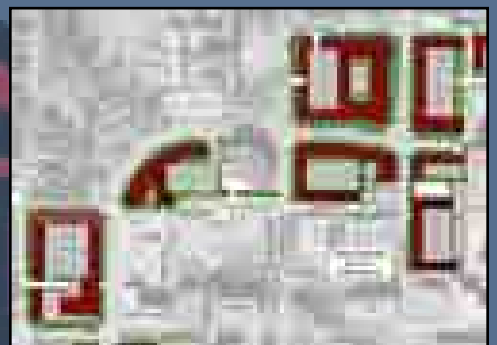
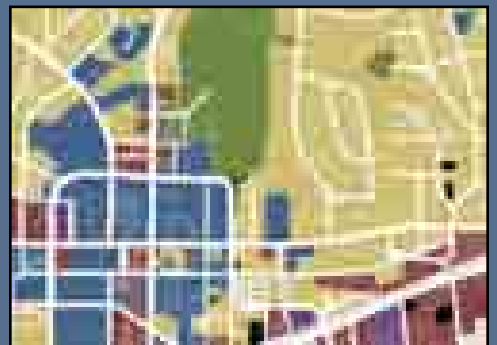
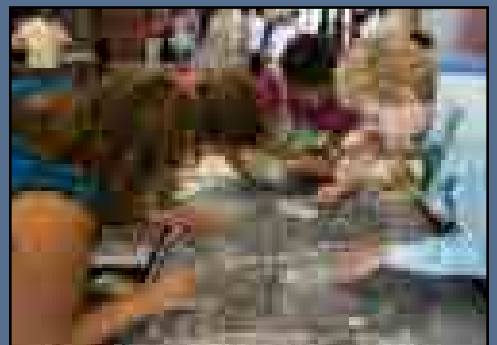


CITY OF DECATUR

LIVABLE CENTERS INITIATIVE STUDY

JUNE 2011





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Decatur 2007 Community Transportation Plan

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INTRODUCTION

The Livable Centers Initiative (LCI) has been nationally recognized for its success in leveraging public investment to promote quality growth and private development in the towns and population or employment centers of the Atlanta region.

Decatur's citywide 2000 Strategic Plan was grandfathered as a Livable Centers Initiative study. Two years later, an LCI study was conducted for the area near the Avondale MARTA Station. (About half of the study area was in the Decatur city limits.)

This current study serves as the ten-year update for the Downtown Decatur LCI study and the five-year update for the Avondale LCI study, but also for the first time incorporates the entire city limits of Decatur as a new LCI study area.

This study builds on the relevant portions of previous LCI and other planning studies, as well as the significant public involvement process carried out for the 2010 Strategic Plan update.

Regional Context

The City of Decatur is located approximately six miles east-northeast of Downtown Atlanta, and approximately two miles southeast of Emory University and the Centers for Disease Control and Prevention.

Decatur is linked to the rest of Dekalb County and the region by a number of regional roadways. The closest Interstate is I-285, which can be directly accessed via Lawrenceville Highway or several secondary routes.

While the lack of freeway access may be detrimental to Decatur in some ways, it remains well connected to the region via MARTA's blue line. Decatur's central position in the regional transit system means that it is accessible by all people.

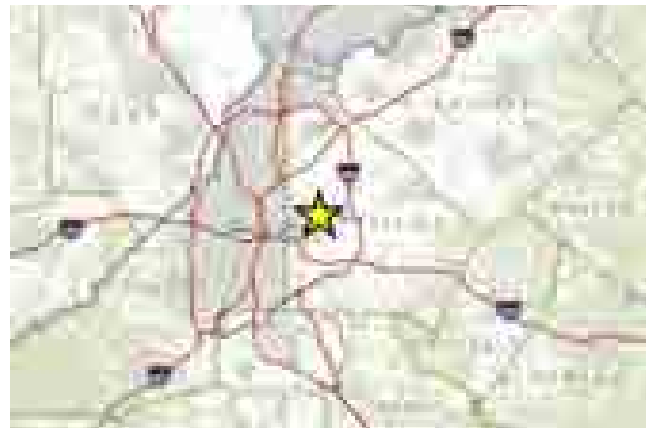
Goals

The goals of the Livable Centers Initiative are as follows. Implicit in the goals is the desire to support lifelong communities and the concept of aging in place.

1. Encourage a diversity of medium to high-density, mixed-income neighborhoods, employment, shopping and recreation choices at the activity and town center level.



Integrated planning of transportation and land use is a primary goal of the Livable Centers Initiative



Regional context of the study area

2. Provide access to a range of travel modes including transit, roadways, walking and biking to enable access to all uses within the study area.
3. Encourage integration of uses and land use policies/regulations with transportation investments to maximize the use of alternate modes.
4. Through transportation investments, increase the desirability of redevelopment of land served by existing infrastructure at activity and town centers.
5. Preserve the historic characteristics of activity and town centers and create a community identity.
6. Develop a community-based transportation investment program at the activity and town center level that will identify capital projects, which can be funded in the annual Transportation Improvement Program (TIP).

7. Provide transportation infrastructure incentives for jurisdictions to take local actions to implement the resulting activity or town center study goals.
8. Provide for the implementation of the Regional Development Plan (RDP) policies, quality growth initiatives and Best Development Practices in the Study Area, both through local governments and at the regional level.
9. Develop a local planning outreach process that promotes the involvement of all stakeholders, particularly low income, minority and traditionally under-served populations.
10. Provide planning funds for development of activity and town centers that showcase the integration of land use policy and regulation and transportation investments with urban design tools.



A community-driven planning process is key to the Livable Centers Initiative

Study Area Overview



Aerial Photograph



EXISTING CONDITIONS



EXISTING PLAN ASSESSMENT

The City of Decatur has made significant progress in the past decade in implementing the recommendations of the Downtown Decatur and Avondale LCI studies. The city's accomplishments are summarized below and in the tables that follow.

Downtown Decatur LCI Progress

Originally dating from 1982, the Town Center Plan was updated in 2007 to outline accomplishments in transportation, housing, and development. For the update, Decatur developed a revised short-term work program based on the Town Center Plan goals and objectives from the 2000 Strategic Plan.

In the past five years, significant progress has been made in plan implementation. The Decatur Downtown Development Authority has been charged with the leading role, in partnership with the City of Decatur and the Decatur Business Association. The primary transportation focus has been completing the downtown streetscape and bicycle network, while the housing element has been furthered by the 2008 completion of the Affordable Housing Study.

Avondale MARTA Station LCI Progress

This study centered on defining a vision and plan for the Avondale MARTA station area that capitalized on its transit access. Similar to the Decatur Town Center Study, the plan encouraged a sense of place—something that had long been missing from the area. P.L.A.C.E. (which stood for Pleasant, Location, Accessible, Cohesive, Engaging) was a set of principles that guided the plan. It also included recommendations for streetscape upgrades, mixed-income housing, and open spaces.

Despite some setbacks, including the failure to create a mixed-income development in the MARTA parking lot, progress has been made in achieving the plan's vision. City regulations have been updated to support the vision, industrial buildings in the district have been converted into new commercial space, and the development of Tally Street Lofts introduced mixed-income housing options.

In addition, progress is being made to implement transportation recommendations, including the development of the MARTA parking lot.

Land Use Regulation Assessment

Much progress has also been made in updating the zoning code and future land use maps to reflect the visions of the Downtown Decatur and Avondale LCI studies. In fact, within both study areas, zoning and the future land use plan now align with the plans' visions, even though existing land uses are developed at intensities significantly less than their potential.

The expansion of the LCI study area to encompass the entire city limits of Decatur, including previously unstudied areas, does mean that there are portions of the city where zoning and land use regulations are inconsistent with the vision of this current plan. Further details on recommendations intended to update these can be found on pages 30-32.

Transportation Plan Assessment

As part of the 2010 Strategic Plan update and this LCI update, deliberate attention was given to integrating previous transportation planning efforts. To this end, the Community Transportation Plan, the Greenway Plan, and the regional Envision6 Transportation Plan were reviewed and incorporated. For this reason there is no inconsistency between the LCI plan and other transportation initiatives.

Potential Implementation Obstacles

As with other communities, one of the greatest challenges to achieving LCI visions has been, and will continue to be, been transportation funding. Public funds never match need, especially for competitive regional grants, but Decatur has been more successful than most in securing them.

In addition, the current state of the Atlanta real estate market has slowed efforts to develop around the city's transit stations. Fortunately, Decatur is well positioned for future growth, especially well-designed rental housing.

Finally, the implementation of specific public and private projects envisioned in this plan will always be impacted by concerns from affected citizens. Designing in a way that minimizes negative impacts will always present a challenge.

Downtown LCI Implementation Progress

Project/Description	Engineering Year	Construction Year	Complete	Under-way	Not Started	Not Relevant	Notes
Phase V of Streetscape Master Plan along E. Trinity corridor between N. McDonough Street and Railroad Tracks	2007	2008		X			Design approved. Waiting for construction approval from GDOT
Bicycle Lanes along W. Trinity Place and W. Ponce de Leon between Decatur city limits to the west and intersection of N. McDonough Street on the east to link to downtown streetscape network	2007	2008	X				
Bicycle lanes along Church Street between Commerce Drive and Decatur city limits	2010	2011		X			Design in process.
Vehicular and safety improvements at Commerce at Church and Commerce at Clairmont	2008	2009		X			Design in process.
Vehicular and safety improvements at grade crossings at E. Trinity Place and N. McDonough	2009	2010		X			
Phase IV of Streetscape Master Plan along N. McDonough Corridor between Howard Avenue and Trinity Place	2009	2009		X			Design approved. Waiting for construction approval from GDOT

Avondale MARTA Station LCI Implementation Progress: Transportation

Project/Description	Engineering Year	Construction Year	Complete	Under-way	Not Started	Not Relevant	Notes
Construction of new Main Street through the MARTA parking lot	2003	2004			X		
East College Ave. Streetscape from S. Columbia Ave. to Arcadia Ave. – South side of road only (can connect to Avondale's – out of study area however)	2004	2005			X		Funding applied for as part of Transportation Investment Act.
S. Columbia Dr. sidewalk along east side of road, bike lanes, from E. College Ave. to Katie Kerr Dr.	2003	2004		X			Portions of sidewalk have been built and a median installed on South Columbia Drive.
Derrydown Way Sidewalk and Traffic Calming measures. Sidewalks along one side of roadway.	2003	2004		X		X	Residents on Derrydown Way rejected the sidewalk project. Traffic calming was installed on South Columbia.
Extend/upgrade sidewalk along Katie Kerr St. from E. College Ave. to Columbia Dr.	2003	2004				X	
Katie Kerr Dr./Methodist Childrens Home Trail	2006	2006		X			The Methodist Childrens Home agreed to work with the Decatur Agricultural Initiative to develop an urban farm on the site, and it includes a trail. The city must find funding.
Multi-use path: Columbia Dr. to Avondale MARTA Station South Entrance	2006	2006			X		Funding applied for as part of Transportation Investment Act
MARTA Structured Parking Facility	2004	2005		X			MARTA rejected the Columbia Park project and the city is working on developing a new plan meeting MARTA's approval

Avondale MARTA Station LCI Implementation Progress: Other

Project/Description	Year	Com- plete	Under- way	Not Started	Not Relevant	Notes
Adopt density bonus provisions into the new zoning districts for projects that include affordable housing units	2003	X				
Require all residential development to have pedestrian-oriented building forms and pedestrian infrastructure through sidewalks and	2003	X				
Adopt new zoning provisions that allow for up to 5 floors of residential development	2003	X				
Promote a balanced mix of owner and renter occupied units within the district	2003		X			
Implement parking standards that are flexible and that encourage shared parking or reduced parking	2003		X			The city will update its parking standards in Fall 2011.
Modify the City Land Use Plan to reflect the zoning changes	2003			X		
Coordinate with Dekalb County to adopt the similar land use, zoning and architectural standards for the portion of the district	2003				X	
Work with the Methodist Childrens Home to locate YMCA athletic fields into their immediate plans	2003				X	This project has been changed to an urban farm project.
Facilitate the relocation of existing industrial uses to other sites within the City or County	2003		X			
Recruit local neighborhood-oriented commercial uses to locate within the new district	2003	X				
Adopt a new zoning district for the study area	2003	X				
Institute a City-based initiative to promote economic incentives for implementing the recommendations of this plan to the development community	2003		X			The city successfully passed a referendum to allow the voters to consider TAD's.
Work with neighboring Agnes Scott and downtown Decatur to promote awareness and accessibility to the new district	2003	X				
Conduct a gateway design competition to develop a gateway concept for the new district	2003			X		
Prepare architectural/design guidelines for new developments in overlay district	2003	X				

EXISTING CONDITIONS ANALYSIS

A number of previous planning studies in recent years have thoroughly analyzed Decatur with regard to its land uses, historic assets, transportation system, natural features, and other characteristics. This study will not attempt to duplicate these analyses, but provides an overview by topical area.

Land Use

The City of Decatur has a diverse mix of land uses characterized by commercial or institutional nodes surrounded by mostly detached single-family homes. Many of the nodes, such as Downtown and Oakhurst, form successful urban districts with activity at various times of the day and week.

The map on the following page shows the existing land use patterns in Decatur. The nodal pattern of uses means that many different activities are within walking distance of each other and residential neighborhoods.

Zoning

Most of the city is zoned R-60 (single-family residential). This zoning primarily allows single-family residences on lots of at least 0.2 acres.

A mix of zoning districts cover the remainder of the city limits and allow for a broad mix of activities. Zoning for the most part is use-based rather than design-based, although specific urban design requirements are provided for some streets downtown. These spell out requirements for sidewalk design, tree plantings, sidewalk entrances to buildings, and parking facilities.

Transportation

Decatur's street system consists of a grid of local streets crossed by a number of roads, including three state routes (SR). SR 155 enters the study area on Clairmont Avenue and follows Commerce Drive east to Howard Avenue. It then follows Candler Street to the south. SR 8 follows Scott Boulevard, and SR 10 follows College Avenue.

The existing street system serves the city adequately, but could be improved to more fully accommodate non-vehicular users. Sidewalks are provided in many locations and help make Decatur a great place to walk, but higher traffic speeds and wide roads in some locations, combined with poor urban design, create gaps in the pedestrian network.



A nodal pattern of land uses means that businesses and gathering places are within walking distance of homes



Zoning requirements preserve the residential nature of the city

Bicycling is convenient in many parts of Decatur, but higher traffic speeds in some areas, combined with the lack of interconnected bicycle lanes or paths, make cycling inconvenient or unsafe for those with less experience.

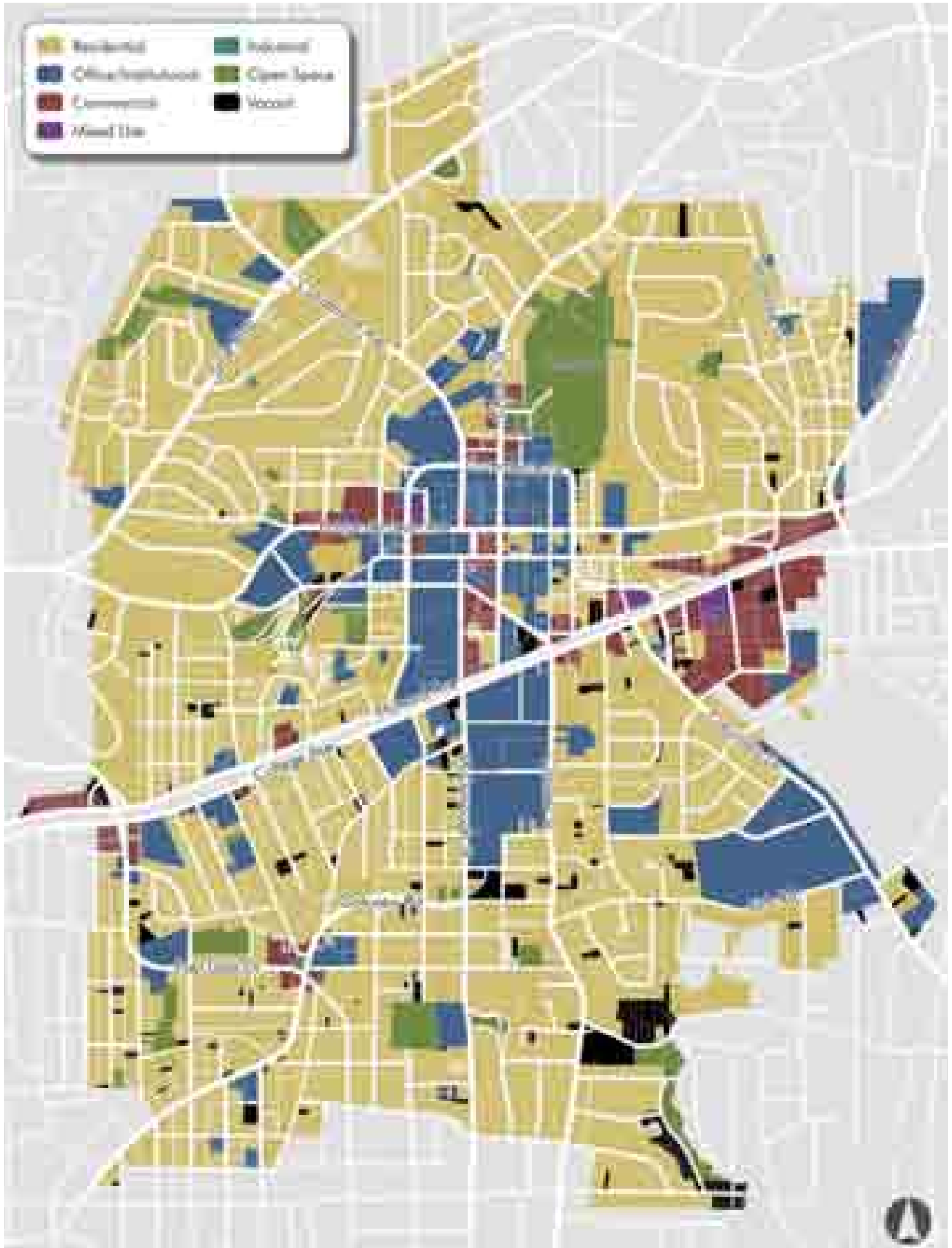
Transit access in Decatur is excellent. MARTA's blue line serves the East Lake, Decatur, and Avondale Stations. Twelve MARTA bus routes and three CCTMA bus routes also serve Decatur and link it with Emory University, North and South Dekalb Mall, and other major surrounding destinations.

Markets & Demographics

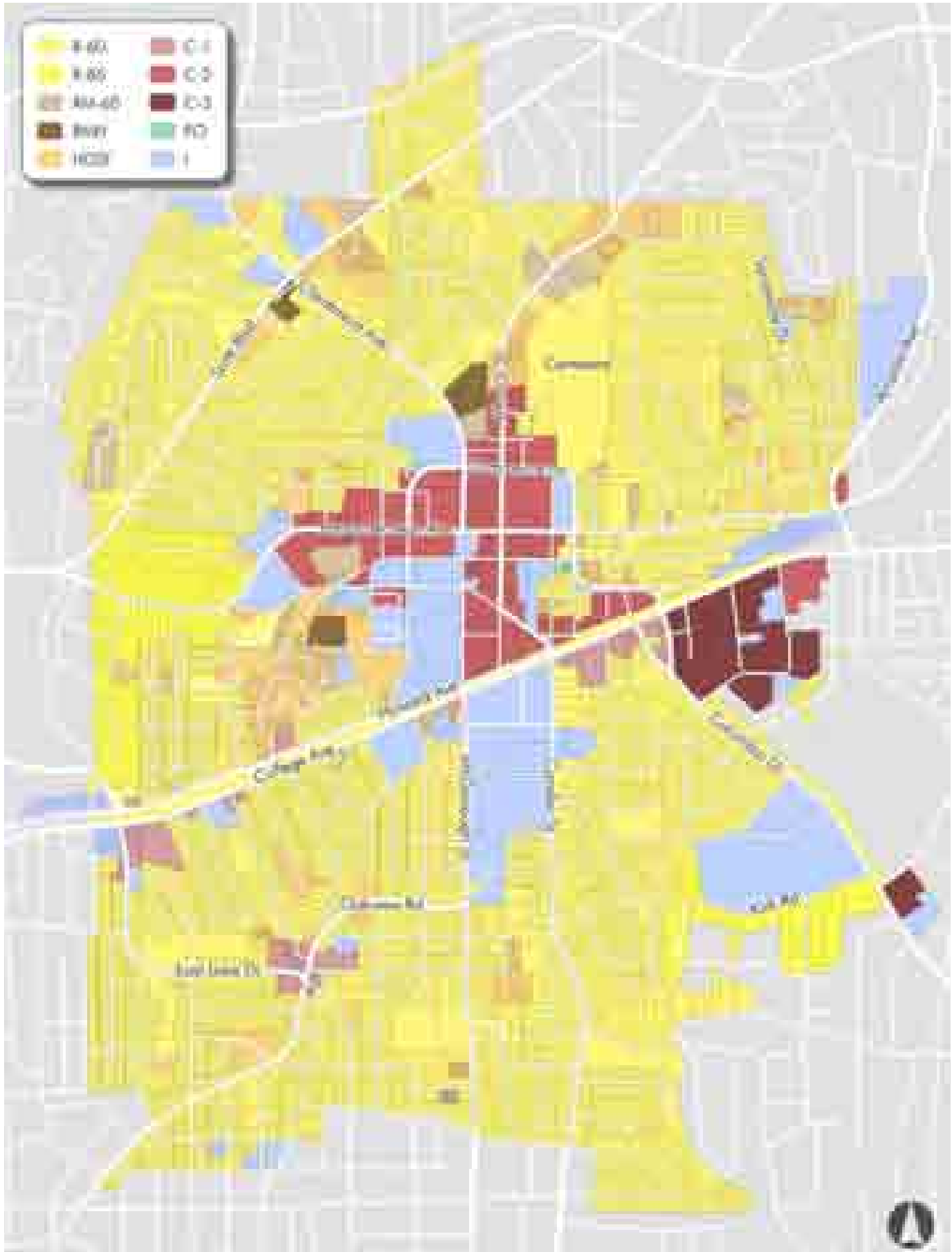
A detailed demographic analysis beginning on page 49 incorporates analysis and demand projections for residential, commercial, office, and light industrial development.

Among the most positive aspects of Decatur are its excellent public schools, transit access, restaurants and retail, active citizens and government, festi-

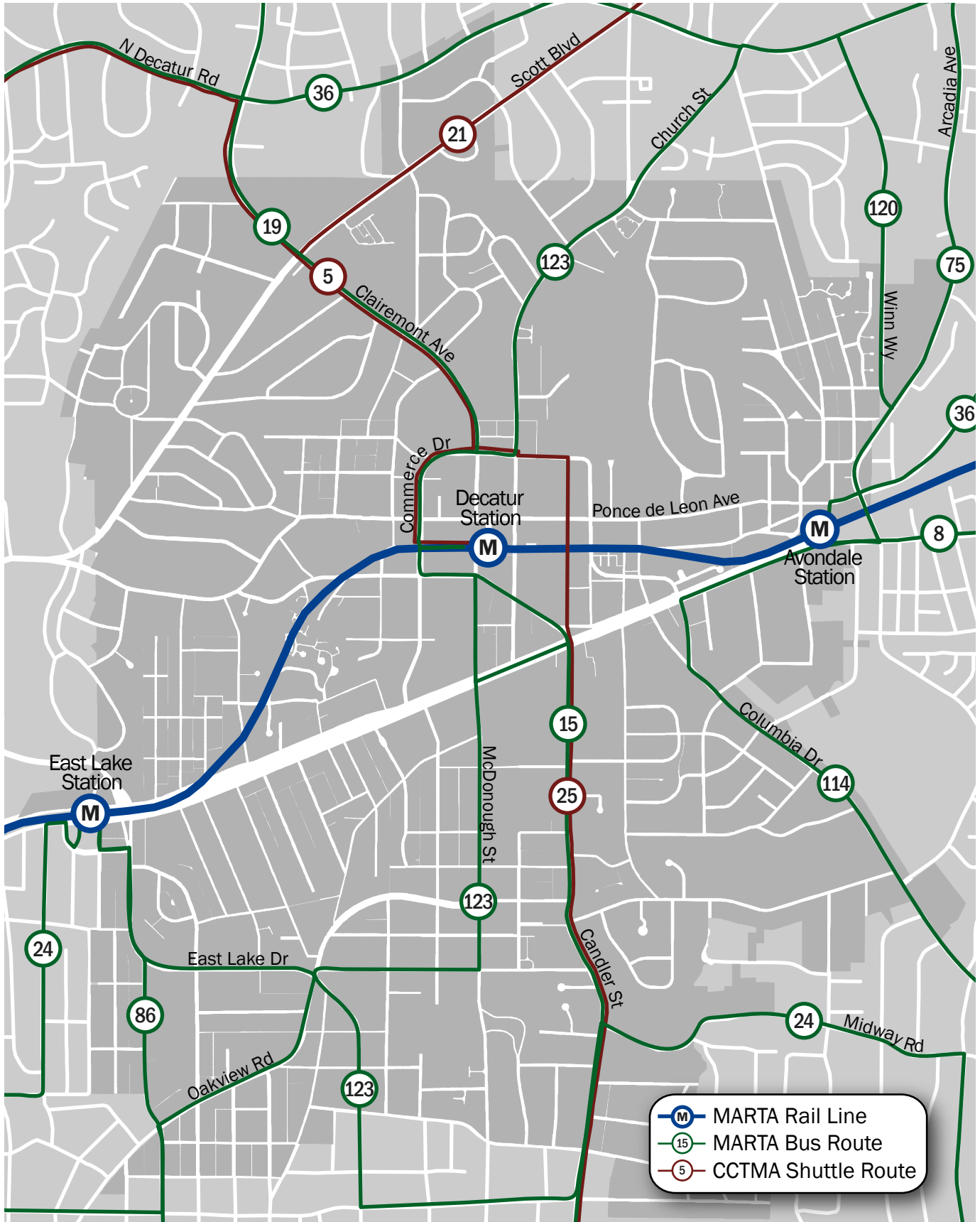
Existing Land Uses



Existing Zoning



Existing Public Transportation Network



vals and events, historic buildings, unique urban character, and wealth of historic residences.

Among the challenges in the study area are the lack of easy highway access, lack of large corporate employers, and the scarcity of rental housing.

Urban Design

Decatur includes an interconnected grid of streets that form blocks as small as 250 by 250 feet, but in some cases more than half a mile long. In some neighborhoods, the grid is fine enough to provide multiple routes to each destination, but large institutions, railroads, and natural features form barriers in some locations.

A number of historically small lots vacant remain for commercial and residential infill, but a number of larger parcels also exist. These larger parcels may be more easily redeveloped, but could disrupt the existing pattern of small lots and mix of uses.

The design of buildings in the study area varies. Historic houses and commercial buildings front the street with entrances and windows, providing a human feel to the sidewalk, but most buildings built from the 1950s through the 1990s detract from the sidewalk environment with frontal parking, opaque façades, and a lack of prominent pedestrian entrances. Some more recent development, especially downtown, respects the street and good urban design, but the absence of design regulations in many locations makes this optional.

Historic Resources

Numerous histories of Decatur have been written and will not be reproduced here. In addition, the 2009 Historic Resource Survey details potential contributing and non-contributing historic buildings. It remains important, however, to emphasize the importance that historic buildings, persons, and sites have in defining Decatur's identity. Each neighborhood's historic inheritance should be preserved and understood for its economic and cultural value.

Environment

Many Decaturites are committed to leaving a small footprint on the natural environment. Signs of this can be found across the city in the form of bicycle racks, community gardens, and rain barrels. City policies, especially in stormwater management



Decatur Public Schools are very highly regarded

and recycling, also reflect a commitment to minimizing Decatur's environmental footprint. Equally significant is the city's physical form, which makes sustainable living possible through compact development patterns that conserve land, make walking feasible, and reduce energy consumption.

Despite having an urban form that is far more sustainable than those found in most of the Atlanta region, much remains to be done to lessen Decatur's environmental impacts. For one thing, automobile use remains high, especially in those areas located away from quality transit service. Additionally, the city's commercial and mixed-use areas can become "heat islands" that result in temperatures significantly higher than those found in the surrounding wooded neighborhoods.

Open Space

The largest public green space in the city is the Decatur Cemetery, although a number of public and semi-public open spaces provide gathering and recreational spaces throughout the city. Many residents have private green spaces immediately surrounding their residences.

Public Facilities

Decatur's collection of public facilities and civic buildings are a significant contributor to its success as a public place. The study area benefits from libraries, a city hall, county courthouse, museum, recreation centers, post office, fire and police buildings, a theater, a number of schools and colleges, and many churches. A number of existing city plans are underway to renovate existing public facilities, including the police station and recreation center.

PUBLIC OUTREACH



PUBLIC OUTREACH

Public outreach for this study was conducted concurrently with outreach for the Decatur Strategic Plan update. This process was one of the most comprehensive public input efforts in metro Atlanta history, and one in which public comments were instrumental in shaping the LCI plan.

ROUND TABLES

From April 27 to June 5, 2010 Decatur held three Round Table discussion sessions. Each session was comprised of 11 separate meetings held at different times and places around the city. The first session involved 741 citizens, the vast majority of whom (78 percent) returned for the second and third sessions.

All together, participants offered 7,894 ideas and images about Decatur's current situation and possible future and about issues facing the city. The Round Tables were face-to-face meetings involving citizens who agreed to attend three sessions. The sessions deal with different topics. Session One, from April 27 to May 1, dealt broadly with what citizens appreciated about Decatur, what they saw as problems, and what they'd like Decatur to be in the future. Session Two, from May 11 to May 15, dealt with six issue areas, from transportation and the environment to housing and healthy living. Session Three, from June 1 to June 5, dealt with connections and community roles.

For each session, the meetings were held at different times and places around Decatur. In each meeting, participants were seated in small groups of 10 or so, to ensure that all would have a chance to speak. Each small group had a trained facilitator and a recorder, who captured citizen comments.

Session One asked citizens to think broadly about the community they would like Decatur to be. Session Two asked about specific big issues facing the city, including transportation, the environment, housing and healthy living. Session Three again focused on big themes, including how the city could strengthen connections between the city government and citizens and among the citizens themselves; and what roles the citizens, organizations and institutions should play in improving Decatur.



Citizen volunteers helped facilitate the Round Tables discussions

Round Tables Session One Themes

Session One asked citizens to think broadly about the future of Decatur, their desires for and concerns about the city's future. Among the thousands of ideas and images, five major themes and three additional themes were apparent. These themes are descriptions of what attracted citizens to Decatur, what they want in the future, and what they worry about losing, depending on the context. Here are the five most prominent themes:

- **The Diverse Community:** This is an appreciation of Decatur's diversity of races, ethnic groups, income levels, ages, family types and sexual orientations. The citizens don't just acknowledge this diversity; they are drawn to it. In some instances, it was what caused them to move to Decatur in the first place. Looking forward, they worry that economic forces may diminish this diversity, and they want the city to do what it can to prevent that from happening.
- **The Involved Community:** This is another reason citizens give for appreciating Decatur, the feeling of community "ownership." More than is common among residents of other places, Decaturites are connected to and involved in their neighborhoods, the downtown and other parts of the city. Their hope is that this sense of community can be deepened in the future; their fear is that it might diminish.
- **The Complete Community:** This is still more of an ambition than a reality, although citizens see significant progress in this area. Basically, there are two meanings that citizens give of

completeness: First, that the city ought to be as self-contained as possible, with services, goods and entertainment close at hand, if not in walking distance. Second, that it ought to be a place where one could work as well as live and play. In thinking about the future, citizens offered numerous ways Decatur might be made more complete.

- **The Alternative Transportation Community:** In the meetings, citizens were clear that they want to be able to move around Decatur in ways other than driving. Basically, they wanted to be able to walk, ride bikes or take transit as easily as—or maybe more easily than—driving an automobile. They had numerous suggestions for making alternative transportation easier.
- **The Responsive & Cooperative Community:** This is what citizens wanted from the community’s major institutions—principally governments (the city government and school system), but also from its businesses and even religious institutions. In short, they want institutions that listen to the citizens and, where possible, anticipate their desires, and they want institutions that cooperate with one another—again, on behalf of the citizens.

There were three themes that, while voiced over and again, were not as prominent in the citizens’ thinking in Session One as those listed above. They were:

- **The Innovative and Distinctive Community:** Citizens said they wanted a community that looked and worked differently than other places, in design, public art and its attraction for innovative companies.
- **The Green Community:** Again and again, citizens said they wanted more green spaces, but there was also the sentiment that Decatur should also be a leader in reducing its impact on the environment.
- **The Active and Healthy Community:** There were many ideas about active living and aging well. A common thread was that Decatur should be a place where people will stay for a lifetime, including their senior years, and that those years should be active and healthy ones.

Round Tables Session Two Themes

In Session Two, citizens were asked to think about specific big issues facing Decatur. Here are summaries of the big themes from these discussions.

Sustaining and preserving Decatur. What most worried citizens most was a potential loss of diversity, which refers to the mix of ethnic, income and age groups that distinguishes Decatur. Underlying this concern were two fears: that housing prices would escalate, pushing less affluent people from the city; and that taxes would become onerous, particularly for the elderly, forcing seniors to move elsewhere. (In a later discussion about housing, another concern emerged: that the elderly would not find appropriate housing as they moved from large single-family houses to smaller, more physically accessible housing.)

In their discussions about sustaining and preserving Decatur, citizens tended to focus on two possible solutions. One was to keep citizen involvement levels high. The thought appears to be that by keeping residents involved in decision making, the city will find good answers to these long-term issues. The other solution was more specific: to build Decatur’s commercial tax base, thereby holding down tax increases for homeowners and other residents.

Tending to the natural environment. Four themes emerged from the discussion on the environment:

- The city should do its best to protect and extend Decatur’s tree canopy, which some saw as in decline.
- Perhaps the answer lies in arming citizens with information on being better environmental stewards, as several groups thought. One group suggested the city “provide education to residents. (The) city can offer classes (like “This Old House” seminar) or post information on how to be environmentally conscious on the city website.”
- A suggested area of improvement was in storm water infrastructure. Ideas ranged from providing rain barrels and employing porous paving technologies for sidewalks to encouraging rain gardens and green roofs (roofs that are covered with soil and plants, absorbing rainwater and keeping buildings cooler).

- The city should use zoning and building codes to require more green developments.

Present and future mobility. In Session One, citizens made it clear that they wanted alternative ways of transportation. And in Session Two, they spelled out some of those ways—new forms of transit and easier ways of walking and biking through the city.

There was almost uniform support for new forms of transit, including the idea of starting a Decatur trolley system. Group after group suggested trolleys, connecting downtown and Oakhurst, Emory University and Agnes Scott College, or the DeKalb Farmers Market. Not everyone thought in terms of a trolley, though. Other groups suggested electric buses, an expansion of Emory’s Cliff bus system, or a “small, alternative-fuel circulator system” similar to Chattanooga’s.

The groups applauded the city’s efforts to make Decatur more walkable but had many suggestions for doing even better, from building sidewalks on every street to turning downtown streets into pedestrian plazas. And that was just the start: There were ideas about educating drivers about stopping for pedestrians, traffic calming measures, expanding construction of brick crosswalks, extending pedestrian crossing times and so on.

Similarly, there were numerous ideas about how Decatur could become more bike-friendly, from bike lanes and paths to more bike racks downtown.

Finally, there were ideas about making transportation work better through information. Some of the information should be directed at drivers, the groups said. Others wanted clearer signage pointing to parking decks and city attractions and facilities. Finally, some groups wanted more information about alternative transportation, aimed at convincing residents and workers to try walking, biking and transit.

Life in Decatur. The discussions about community gatherings and cultural life focused on three topics:

- Pride in Decatur’s abundance of festivals and community events, which were seen as critical to the city’s identity and sense of community.

- The suggestion that the city try smaller, neighborhood-focused events in the future. “Create more localized, neighborhood-specific gatherings,” one group offered. “It seems like there is either a big event or nothing,” another group said. “We need smaller, simpler, regular public activities.”

- Support for making Decatur a center for the arts. “We would like to see more public art,” one group said. “Make our city a mecca for the arts,” another said. “Maybe a film festival,” suggested a third group.

The future of housing. More than any other topic in Session Two, the discussions on housing touched on the concern that, as Decatur becomes more affluent, it will lose its ethnic, income and age group diversity. Not surprisingly, groups called for greater provision of affordable housing and housing that is appropriate for an aging population.

But when the discussions turned from the general to the particular, there was a recognition that the most likely ways of ensuring a diversity of housing options—through greater density and more mixed-income and rental housing—would be politically challenging. One recommendation offered by several groups: Allowing single-family houses to add garage apartments and accessory dwellings so Decatur could be known “as a place where we let you bring your family to live with you.” The same group added, though, “people are worried about too many cars.”

Healthy living. In thinking about what Decatur could do to promote healthy living, citizens lined up behind three things:

- The city could do a better job of promoting exercise and other forms of active living.
- It could help citizens find healthier food.
- It could offer information that connects citizens with healthy living resources.

Some of the exercise ideas had been touched on in earlier discussions about alternative transportation—that is, the city could be made easier for walking and bike-riding. But there were also ideas offered for making parks, the Decatur Recreation Center and other public facilities more enjoyable as exercise centers.

There were a number of suggestions for encouraging or facilitating community gardens, so people could get healthier food (and the exercise of gardening). Others said they would like “more open-air markets for fresh food and other goods.”

Finally, there were suggestions that the city could do more to offer information to citizens about healthy living. One group suggested that the city “partner with medical centers (i.e., DeKalb Wellness Center, Emory, Kaiser) for health seminars, screenings, etc.” and promote this information. “There are a lot of healthy activities already,” one group pointed out. “Perhaps,” it added, the city should devote “more attention to marketing what is available.”

Round Tables Session Three Themes

Desire for more information, delivered in different ways. This desire was made clear throughout Session Three discussions. It was also a major theme in Session Two, when citizens were asked about how to have a more environmentally sustainable community, how to improve mobility and how to have a healthier community. The information citizens wanted wasn’t so much about the inner workings of government (the need for government transparency is taken as a given in Decatur), but rather information that could help residents be more engaged and effective citizens.

Some of the citizens’ ideas dealt with how to involve others in Decatur’s public life. Other suggestions were about the form of communications. Some were in favor of more and different kinds of online information, from data bases and targeted e-mail to web sites and televised web casts. Others cautioned that not everyone has Internet access.

Desire for more citizen engagement, volunteerism, and connection. Decatur already has an engaged citizenry by most places’ standards—but not by Decatur citizens’ standards. There were three areas in which participants believed citizen participation could improve:

- Engagement with the city government, by attending public meetings and joining city boards and commissions.
- Volunteering for non-profits or, in some cases, to assist the city government.
- Meeting one another, through neighborhood associations or other means.

What these three desires had in common was the belief that the city could play a role through information, events and infrastructure in accommodating these aims.

Desire for more & different groups to be involved & effective. Citizens brought up these themes in two ways. The first was in pointing out there were many organizations or groups in or near Decatur that were uninvolved in its public life, from institutions like churches and colleges to refugee organizations and neighborhood associations.

The second was in saying that working through groups was more effective than acting as individuals and had the additional benefit of building connections and a sense of community. For these reasons, many thought the city should concentrate on partnering with groups that exist, helping groups work more effectively with other groups, and encouraging new groups to form.

DECATUR NEXT WEBSITE

Throughout the Round Tables and Strategic Plan Update process, an interactive website at www.decaturnext.com provided information and discussion space. Postings and a calendar provided information on upcoming meetings, which were also advertised by e-mail. A wealth of other information was available, including comments from the Round Tables, presentation slides from the Community Academies, information about the project team, video interviews with stakeholders, and details from each public meeting. These



The Strategic Plan update website allowed input that has been incorporated into this LCI study

posts after each meeting allowed those not in attendance to learn what happened and share their thoughts. More than 19,700 visits to the website were recorded during the process.

COMMUNITY ACADEMIES

In order to further explore themes that surfaced during the Round Tables process, a series of Community Academies was convened. Each academy featured an expert speaker who addressed a theme or group of related themes. Attendees then participated in a discussion exercise based on the knowledge presented, with the goal of delving deeper, moving toward consensus, and generating more focused comments to help create and refine the draft Strategic Plan Principles, Goals, and Tasks.

Going Mobile

While Decatur completed its Community Transportation Plan in 2007, transportation was among the most talked about issues during the Round Tables process. The “Going Mobile” Community Academy was convened with the goal of digging deeper on the specific issues of connectivity, streets for people, transit, and parking. DeWayne Carver, AICP of Hall Planning & Engineering, Inc. gave the introductory presentation.

Discussion centered around the benefits and drawbacks of connectivity. Participants expressed a desire to focus on the benefits of citywide connectivity over the desires of a particular street, but in ways that respect existing neighborhoods. In addition, psychological barriers to connectivity such as dangerous state routes or railroad crossings were identified.

The very popular idea for a circulator shuttle, already included in the Community Transportation Plan, was fleshed out at this academy. Examples from other communities were presented; those that served high-density areas and supported existing transit service were most successful. The average cost per trip among case studies was \$2.18, but could be higher or lower in Decatur.

The availability of parking came up frequently during the Round Tables, but there was some disagreement over how to manage the existing supply and how to balance the desire for parking

with goals of walking, bicycling, and more efficient land use.

Maximizing the use of existing public parking facilities and promoting shared parking in existing lots and future developments was a key discussion theme. Existing parking requirements were examined, and participants recommended ways to amend existing zoning to promote more efficient supply of parking.

Decatur for Life

The second Community Academy focused on issues of aging, affordability, and diversity—key topics that emerged during the Round Tables process. These issues built on the information presented at the first Academy, because walkability, affordable transportation, and connected neighborhoods are key to making Decatur a place for all kinds of people.

A series of detailed informational boards greeted attendees of the Academy, who were given a chance to absorb the information before a brief presentation began.

Ben Brown of PlaceMakers gave a brief presentation of demographic and economic trends, along with related challenges and opportunities. Following the presentation, participants worked in small groups on an exercise to rank Decatur on its effectiveness at various factors related to affordability and aging in place. Discussion centered on regulatory barriers and incentives to affordable housing types, the appropriateness of housing types for different neighborhoods, addressing the broader issues of affordability, education to builders and residents about housing trends, and residential property taxes. A ranking exercise allowed each table to discuss and prioritize the issues.

The New Main Street

Discussions in the previous Community Academy inevitably led from housing and affordability to taxes, so “The New Main Street” allowed an opportunity for education and discussion about not only taxes, but retail space, jobs, and fiscal sustainability in the changing economy. Lakey Boyd of Market + Main provided the economic background that began the discussion.

Every table at this third Community Academy agreed that the existing 85/15 mix of Decatur’s

property tax was not sustainable and has a negative impact on diversity and housing affordability. Options to expand the commercial share include attracting new businesses or annexing commercial areas, but the most significant alternative may be through infill development in existing centers and potential growth areas.

Participants discussed four nodes where significant potential for growth exists: Downtown, Oakhurst, the East Decatur/Avondale MARTA Station area, and the East Lake MARTA station area. The desired mix of residential, commercial, and office at each of these three nodes showed residential carrying less than a majority of the tax burden.

Another significant focus of discussion was the nature of desired businesses. Many specific business types or chains were mentioned, but most comments centered on places to buy groceries or other daily needs, or on creative businesses or office tenants, such as architects and marketing or technology firms.

Getting the Love We Want

Many of the comments received and topics discussed during the first three Community Academies centered around providing additional services to increase quality of life in Decatur. Better transit, more small businesses, sustainable practices, more places to walk, new housing options, and other improvements were suggested, but no tax increases were desired to provide these.

One of the simplest solutions to providing additional services and density without raising taxes is to expand the tax base through infill development. There are currently 165 underdeveloped acres within the city limits. Of this land, 46 acres already have approved redevelopment projects. Much of this land is in key Decatur centers such as Downtown and near transit stations, and can accommodate the additional density to provide more tax revenue, allow more public services, and attract private investment.

Discussion centered around the best types of transitions and how to use them to protect existing neighborhoods from the negative aspects of new development, while also allowing them to benefit. A number of specific tools were mentioned to encourage appropriate infill in appropriate areas,

and ways to move beyond negative neighborhood perceptions were discussed.

In general, the consensus was that dense infill development has an important place in Decatur's next decade, particularly in potential growth areas. With appropriate regulation, new development could provide many of the benefits the city desires.

OPEN HOUSES

After reviewing the input from the Round Tables and the Community Academies, a series of draft principles, goals, and tasks, along with conceptual growth plans, were presented at two open houses and at drop-in sessions held in a vacant storefront space downtown.

Based on preference exercises, there was overwhelming support. Fewer than 20% of participants left a comment suggesting changes, and many of these comments were incorporated into the plan in some way.

During the Community Academies, a map of potential growth areas was developed to help focus the discussion about redevelopment opportunities on areas where it was most likely to occur.

Based on public comments at the Academies regarding the location, type, scale, and characteristics of new development, Conceptual Growth Alternatives were prepared. These alternatives incorporated community desires for more dense, walkable, mixed use development that would increase tax revenues, provide more accessible services, expand retail options, and enhance connectivity.

The Conceptual Growth Alternatives were displayed at both Open Houses and at the storefront space on Terrific Thursdays for public comment. More than 50 detailed worksheets were completed with specific comments on density, connectivity, open space, and other issues related to each of the eight plans (two alternatives for four nodes).

RECOMMENDATIONS



LAND USE & ZONING

Decatur has been successful with its development strategy to preserve single-family neighborhoods and revitalize aging and underutilized commercial areas. As the city's population continues to grow, so must its built environment in a way that accommodates commercial and residential growth while maintaining Decatur's unique character.

The land use recommendations provided below are policies that build upon principles and goals identified in the 2010 Strategic Plan. These policies will direct the implementation of the city's vision, address the goals of the Livable Centers Initiative, and guide future growth and sustainability.

Land Use Policies

Continue to encourage mixed-use development. This should include retail, restaurant, office, and residential uses, to increase opportunities for pedestrian connectivity. Commercial districts are ideally suited to accommodate the housing types needed to serve Decatur's future. Development should provide multifamily units for sale or rent, townhouses, live-work units, senior housing, and other options.

Find opportunities to redevelop existing commercially zoned properties to their highest and best use. The study area does not lack surface parking and underutilized commercial uses. When considering a development site appropriate for higher density development, focus development efforts on parking lots and aging commercial and office structures where redevelopment is inevitable.

Support a holistic understanding of housing affordability. This should look beyond simple rent or sale price and address a commitment to providing quality housing for all stages of life. The true cost of housing should also consider factors such as transportation, utility, and maintenance costs. Strategies aimed at reducing car ownership and parking, increasing energy efficiency, and providing buildings that are built to last can lower the cost of living.

Projects vs. Policies

Recommendations in this study are divided into policies and projects.

Projects are specific tasks with a defined cost and timeframe. Numbers in parentheses after each project refer to cost and timeframe details in the Implementation section beginning on page 45.

Policies are general guidelines that provide direction to the implementation of the Livable Centers Initiative vision. They often support recommended projects and should serve as the basis for future actions on the part of decision makers.



Decatur should continue to encourage mixed-use development in appropriate places



Underutilized land should be prioritized for redevelopment



New types of housing should be encouraged to provide affordable places to live for people from all walks of life



Existing rental housing should be preserved to help preserve the stock of affordable housing

Improve the appearance of Decatur’s commercial districts in ways that reinforce their roles as community focal points. Upgrades could include public facilities, street furniture, bicycle racks, trees, public spaces, or interactive kiosks with maps, visitor information, event schedules, and community information.

Encourage the development of new apartment buildings and the renovation and preservation of existing apartment housing. This will address the commitment to provide quality housing for all stages of life.

Support programs that help elderly, low-income residents remain in the community.

Land Use Projects

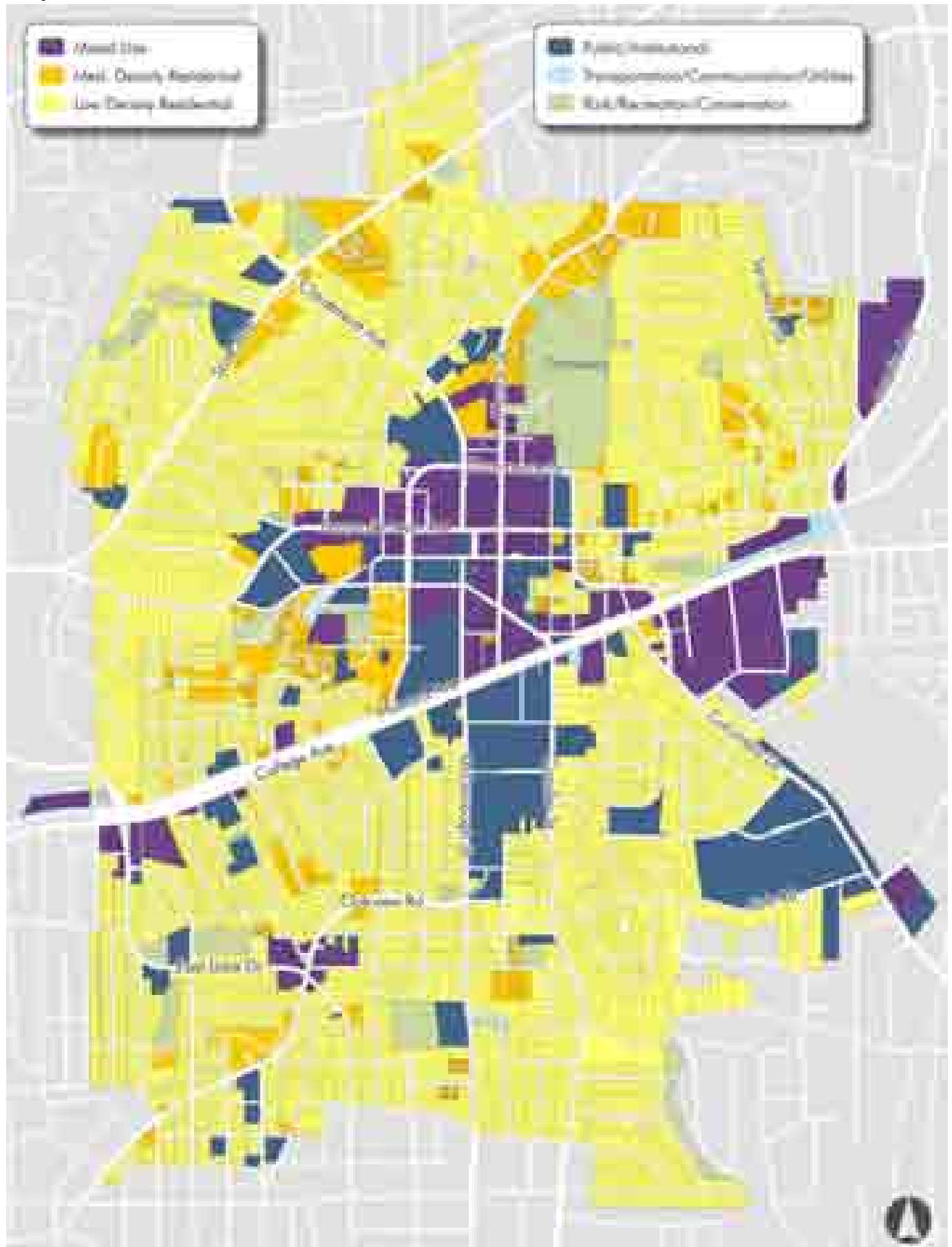
Amend the Future Land Use map. The following amendments should be made to the city’s existing future land use map to bring it into conformity with LCI principles and the proposed map on the following page:

- The former Devry University campus on Arcadia Avenue should be changed from “Public/Institutional” to “Commercial” to reflect its desired redevelopment into a mix of uses.
- The parking lot and bus loading area north of the Avondale Station should be changed from “Transportation/Communication/Utilities” to “Mixed-Use” to reflect desired redevelopment.
- 124 and 208 S. Columbia Dr. should be changed from “Low Density Residential” to “Mixed-Use” to reflect their existing and desired uses.
- 428 and 432 Lockwood Terrace should be changed from “Public/Institutional” to “Low Density Residential” to reflect their existing and desired uses.
- The existing commercial buildings at the southeast corner of College Avenue and Candler Street should be changed from “Low Density Residential” to “Mixed-Use” to reflect their existing and desired uses.
- The parking lots on the north and south sides of the East Lake MARTA station should be changed from “Transportation/Communication/Utilities” to “Mixed-Use” to reflect their desires redevelopment into a mix of uses.
- Parcels shown along Westchester Drive should be changed from “Low Density Residential” to “Park/Recreation/Conservation” to reflect their existing and desired uses.

The following general changes should also be made:

- Change the color of the “Public/Institutional” category from the existing green to the proposed dark blue, to avoid confusion with park land.
- Combined the “Commercial” and “High Density Residential” categories on the existing future land use map into a new category called “Mixed-Use,” shown as purple.

Proposed Future Land Uses



Zoning Policies

This plan does not recommend creating new zoning districts, but instead provides an assessment of zoning initiatives identified in the 2010 Strategic Plan and provides recommendations on how they can be addressed.

Zoning Projects

Refine citywide commercial design standards.

Design standards should be refined to support quality commercial and mixed-use growth. These should recognize the unique character and scale of Decatur's neighborhoods and avoid one-size-fits-all approaches. Updated standards for utility burial, architectural design, and parking should be explored as part of these refinements.

Adopt new sign ordinance requirements to encourage more compatible signage in commercial districts.

Update the Downtown Decatur Special Pedestrian Area guidelines and expand the downtown streetscape program. Existing guidelines have promoted a high quality of development on key streets downtown, but updates are now needed. Among the suggested changes are enhanced standards for the protection of historic storefronts, requirements for inter-parcel connectivity, and an expanded area. In addition, the downtown streetscape network should continue to be expanded.

Adopt universal design guidelines to allow new commercial buildings, businesses, and homes to be visitable by those with mobility impairments. Even the most able-bodied members of society will one day reach periods in their life where their mobility is impaired. Creating housing that is accessible or visitable to a wide range of citizens would benefit both current and future residents, and make the city resilient in the face of demographic changes.

Adopt ordinance changes to allow more housing options. Changes should allow smaller homes, support accessory dwellings, and encourage other creative housing options that provide affordable housing in single family neighborhoods. Educate the public about their characteristics and benefits.



Commercial design standards will ensure more compatible buildings

Support the expansion of the Decatur housing trust fund. Revise and expand affordable housing incentives like the housing density bonus to encourage private developer funding.

TRANSPORTATION

The recommendations in this section that are not drawn directly from the Strategic Plan come from the 2007 Community Transportation Plan. They support its guiding principles of health, safe choices, community, and connectivity, but do not reproduce all of its recommendations.

The goal of these recommendations is to provide safer and more pleasant travel for pedestrians and cyclists, while still providing access to vehicles. They also connect neighborhoods to downtown and allow major streets to become shared community spaces that will sustain Decatur's quality of life for decades to come.

Transportation Policies

Implement the recommendations of the Community Transportation Plan. This comprehensive plan includes a thoughtful range of transportation projects and policies. These include bicycle infrastructure improvements, an internal shuttle system, gateway intersection upgrades, and improved at-grade railroad crossings. Implementing the plan's recommendations will improve safety for all modes of transportation, improve quality of life, and serve the needs of an aging population.

Continue to implement the Safe Routes to Schools program.

Be recognized as a bike friendly community.

Review existing conditions to establish appropriate and consistent speed limits to increase safety and make walking and biking more desirable.

Strengthen partnerships between the City, the Clifton Corridor Transportation Management Association, and major Decatur employers to encourage alternative transportation.

Encourage MARTA to improve maintenance and cleaning at Decatur Station, especially the bus bay.

Continue to support other creative transportation options, like car sharing and scooters, through public education and by providing parking opportunities.



The vision for a balanced transportation system put forth in the Community Transportation Plan should be supported (image courtesy NHTSA)

Promote more efficient use of parking. This could occur with electronic signs, shared use of existing lots and decks, consolidated parking meters, more strict enforcement, higher parking fines, and similar techniques.

Expand the off-street path system. Use vacant or unbuildable lots, utility corridors, or stream corridors to create mid-block passages.

Expand program offerings such as a "walk there" campaign and bicycle training/education activities to encourage active, healthy lifestyles for all age groups.

Transportation Projects

The following transportation projects are excerpted from the 2007 Decatur Community Transportation plan. Additional details can be found in that plan and in the Action Matrix on page 46 of this study.

Commerce Drive road diet (T-1 through T-3).

Reducing the number of vehicular lanes along the length of Commerce Drive from West Trinity Avenue to East College Eavnue could provide space for wider sidewalks, landscaping, bicycle lanes, or on street parking. It would slow traffic speeds and make walking and biking safer on this major roadway, but careful attention would be needed between Clairemont and Church due to high traffic volumes. This project would be phased

Improve the intersection of Commerce Drive and Clairemont Avenue (T-4).

Widen sidewalks on all four corners, widen the width of crosswalks, install countdown signals for pedestrians, implement traffic signal timing changes to reduce pedestrian delay, and reduce the number of traffic lanes. These improvements will enhance safety for everyone and create a more effective gateway to Downtown.

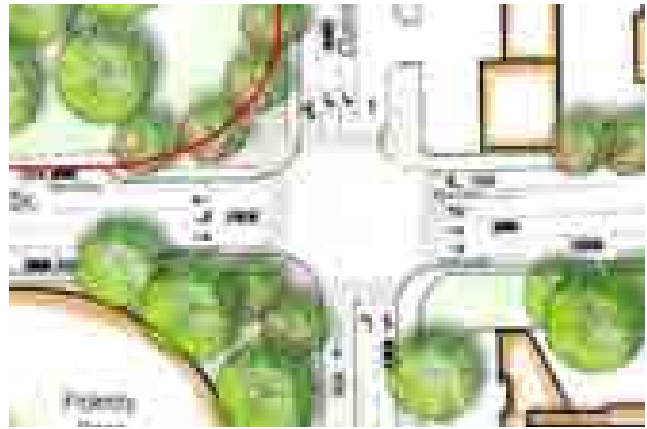
Improve the intersection of Commerce Drive and Church Street (T-5).

Widen sidewalks on all four corners, widen the width of crosswalks, install countdown signals for pedestrians, implement traffic signal timing changes to reduce pedestrian delay, and reduce the number of traffic lanes. These improvements will enhance safety for everyone and create a more effective gateway to Downtown.

Phase V pedestrian improvements along East Trinity Place (T-6). These improvements should run from the railroad to McDonough to Street.

Clairemont Avenue pedestrian improvements and road diet between Ponce de Leon Avenue and Commerce Drive (T-7). The 100 block of Clairemont Avenue should be improved to enhance the pedestrian experience and expand the downtown streetscape network.

Church Street pedestrian improvements and road diet between Ponce de Leon Avenue and Commerce Drive (T-8). The 500 block of Church Street should be improved to enhance the pedestrian experience and expand the downtown streetscape network.



The intersection of Clairmont Avenue and Commerce Drive could be made safer and create a more effective gateway to downtown with several improvements



The intersection of Church Street and Commerce Drive could be made safer and create a more effective gateway to downtown with several improvements

Church Street pedestrian improvements (T-9).

These improvements should extend those in T-8 from Commerce Drive north to the city limits.

Oakhurst Village pedestrian improvements (T-10).

These improvements are to include wider sidewalks, seating areas, improved crosswalks, new lighting and trees, and bicycle racks at the intersection of Oakview Road, West Hill Street, and East Lake Drive, as well as new angled parking.

South Columbia Drive multi-use path (T-11).

A new multi-use path should be constructed parallel to Columbia Drive along its northeast side from College Avenue south to the city limits. This will make the route safer for cyclists and pedestrians.

Howard Avenue pedestrian improvements (T-12).

Improvements along the entire length of Howard Avenue within the city limits could make the street a safer place to walk.

Improvements at the intersection of South Candler Street, East College Avenue, East Howard Avenue, and the railroad (T-13). This complicated and dangerous intersection should be improved as shown in the diagram at right.

Improvements at the intersection of McDonough Street, College Avenue, Howard Avenue, and the railroad (T-14). These improvements, in combination with those proposed by T-15, will make the intersection safer for everyone.

North McDonough Street road diet (T-15).

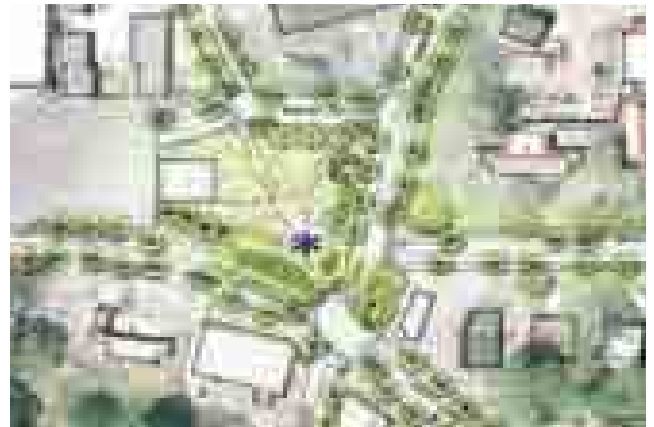
Reduce the number of lanes from the railroad tracks north to West Trinity Place to allow for additional parking spaces to serve the high school and businesses, as well as new medians and safer pedestrian facilities.

Improvements at the intersection of West College Avenue, West Howard Avenue, Atlanta Avenue, and the railroad (T-16).

This intersection should be simplified to allow one right-angle intersection between Atlanta Avenue and Howard Avenue. The multi-use path should also be relocated to parallel Howard Avenue.

Traffic calming on neighborhood conservation streets (T-17).

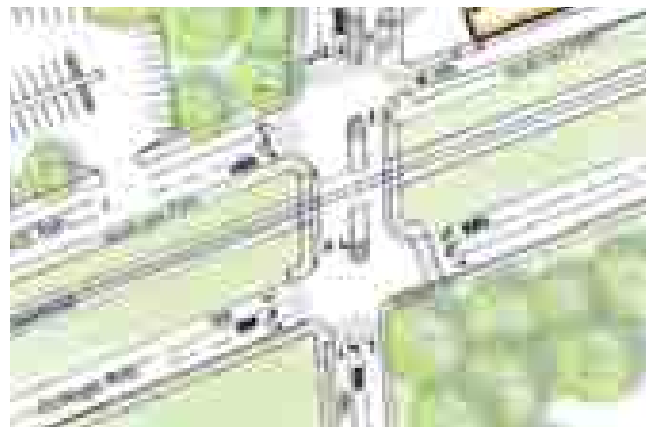
Neighborhood conservation streets, as defined in the Community Transportation Plan, may carry more traffic than local streets, but must be designed to slow vehicles. Traffic calming



Pedestrian improvements in the Oakhurst Commercial District will enhance safety and aesthetics, and promote private investment



Improvements could make the intersection of Candler Street, College Avenue, and Howard Avenue more simple, and make crossing the railroad tracks safer



Improvements where McDonough Street crosses the railroad could simplify the intersection and make it safer for pedestrians, cyclists, cars, and trains

measures should be implemented on these streets throughout Decatur.

Clairemont Avenue complete street improvements (T-18). These improvements should allow Clairemont Avenue to more effectively address the needs of bicyclists, transit riders, and pedestrians, rather than just motorists. Improvements should run from Ponce de Leon Avenue north to the city limits.

College Avenue pedestrian improvements (T-19). Improvements along the entire length of College Avenue within the city limits could make the street a safer place to walk.

Scott Boulevard sidewalks (T-20). Completing the existing segments of sidewalks along Scott Boulevard's west side will provide better connectivity and safety for pedestrians along this dangerous state route.

Extend pedestrian tunnel under College Avenue (T-21). An existing pedestrian tunnel runs from Howard Avenue underneath the railroad tracks to the edge of College Avenue. To prevent pedestrians from having to cross College Avenue at grade, the tunnel could be extended under College Avenue. This would allow safer access to the Agnes Scott College campus.

ADA upgrades at transit stations and schools (T-22). Basic sidewalk and crosswalk upgrades could make it safer for pedestrians, particularly those with disabilities, in the places where pedestrian activity is likely to occur, such as at MARTA stations and near public schools.

Add bicycle lanes along South Candler Street (T-23). Bike lanes from College Avenue south to the city limits could fit within the existing cross section and provide a safer route for cyclists.

Install bicycle facilities at MARTA stations, including a downtown bike station (T-24). These improvements could include covered parking and lockers, or even showers and repair facilities downtown.

Add shared lane bicycle markings where appropriate (T-25). Shared lane markings or sharrows along streets that connect to MARTA stations or activity centers could help make motorists more aware of those on bikes, and identify the best routes for cycling.



Sidewalk and crosswalk improvements near transit stations and schools will benefit pedestrians



Bike lanes along South Candler Street could make Decatur much more safely access by bicycle (image courtesy Dan Burden)



Shared lane markings help cyclists identify the best routes, and help motorists be aware of cyclists

Create a circulator shuttle (T-26). This public shuttle could build on existing MARTA and CCTMA bus service, connect to rail stations, and link neighborhoods and activity centers.

Construct a new street between Derrydown Way and Sams Street (T-27). This new street would require right-of-way acquisition, but would greatly enhance connectivity to proposed redevelopment south of the Avondale MARTA station.

Construct a new street in the Montgomery Street right of way (T-28). This new street would connect Clairemont Avenue to Ponce de Leon Place in largely existing right-of-way.

Update parking standards (T-29). Allow innovative parking strategies, such as shared or unbundled parking, that create pedestrian friendly, environmentally sustainable, and affordable developments.



A circulator shuttle could complement existing transit service and connect Decatur neighborhoods and destinations

MARKETING/ECON. DEVELOPMENT

The following recommendations are taken directly from the Strategic Plan.

Develop a business recruitment strategy. This should target retail businesses and restaurants that meet identified community needs or new service businesses that respond to specific requests like a downtown boutique hotel. Extend this recruitment effort to attract new office tenants that expand employment options.

Continue to focus marketing and advertising efforts designed to support and enhance the “Decatur brand,” to attract quality new business that meet the community’s vision, and to assure the success of existing businesses.

Identify available areas for light manufacturing and market them to potential businesses. While Decatur is poorly suited for conventional manufacturing, niche industries could include artisanal food processing, artist studios, clean technology, and the production of high-value consumer goods. If located downtown, these businesses should be carefully integrated into the existing urban fabric to be respectful of existing residents, businesses, and civic buildings.

Explore amending vending and food cart regulations to permit them in commercial districts and parks. These could provide convenient meals and allow more people to open businesses without significant startup costs, but could also negatively impact existing businesses if not carefully implemented.

Explore partnership opportunities to create a business incubator or provide other similar incentives. These could support business startups in the areas of technology, artisanal manufacturing, media content production services, and similar creative business types.



Artisanal manufacturing could expand the market for locally-produced goods



Vending or food carts in public spaces could allow new businesses and provide more food options

URBAN DESIGN

Building on its excellent urban design features, Decatur should be guided by the following policies and implement the following projects to continue to improve itself as one of the region's premier cities.

Urban Design Policies

Adopt long-term build-out visions for remaining underutilized commercial areas.

Consider creating a neighborhood mini-grant program. This could encourage grass roots community improvement projects such as neighborhood kiosks, public art, tree plantings, neighborhood signs, and park improvements, and build a stronger partnership between city government and neighborhood organizations.

Integrate art into public facilities, such as sidewalks or new buildings, in partnership with local schools, the Arts Alliance and local artists.

Urban Design Projects

Improve the landscaping and physical appearance of the Square. Decatur's most used public space should be improved to better serve the community.

Install new waste and recycling bins that are more clearly distinct from each other and more aesthetically pleasing.

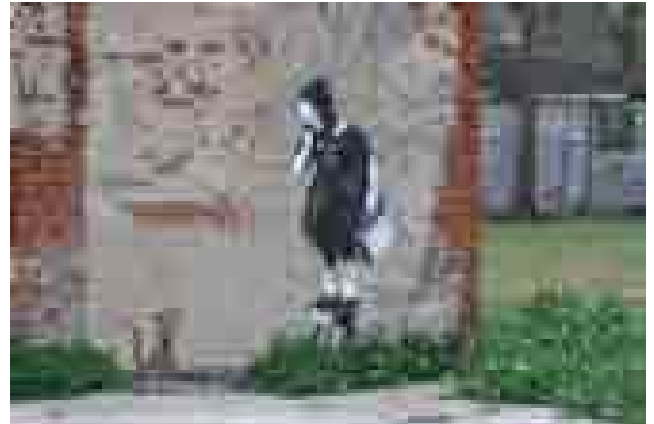
Adopt new transitional design standards to integrate commercial, mixed-use, and residential districts. In recent decades, Decatur has used buffers and height limits to transition between existing single-family neighborhoods and new developments in existing commercial and mixed-use zoning districts. These have focused on separating such areas, rather than unifying them. As an alternative, new design techniques should be explored to provide appropriate connection between new development and existing neighborhoods, such as improved architectural design, scale and massing, and landscaping.

Study if live-work housing can be implemented in existing neighborhoods without a negative impact on nearby homes. As technology and employment continue to evolve, more Decatur

residents are running small businesses from their homes. Although current zoning regulates the types of home businesses that can occur, these may need to be reviewed or modified periodically to ensure their relevance.

Improve the predictability and efficiency of the process for new development approval.

This should be done by establishing development standards and requirements that are consistent with the goals of the Strategic Plan.



Public art enhances quality of life and community identity



There are many ways to transition between new development and existing houses, including the existing requirement for upper story setbacks

HISTORIC RESOURCES

The following recommendations attempt to promote historic awareness and preservation in Decatur, based on a number of public comments received on these topics, but in a way that respects the rights of individual property owners.

Historic Resources Policies

Pursue efforts to educate and involve neighborhood residents in determining the best methods for preserving the historic character of neighborhoods while accommodating appropriate new construction. Consider revisiting the infill housing guidelines on a regular basis as a way of accomplishing this task.

Increase public awareness of historic buildings and places and provide appropriate staff support to accomplish the historic preservation goals of the community.

Historic Resources Projects

Reexamine historic design standards and restrictions against historic home demolition.

The preservation of neighborhood character is as much about protecting historic homes as it is ensuring compatible new construction. While new construction is now regulated by zoning, retaining the historic character of existing homes is also critical. An update of the existing historic preservation ordinance should be undertaken and regulatory changes made, if appropriate.

Educate commercial property owners about historic preservation tax credits and the Georgia Cities Foundation loan program. Encourage expanded use of these tools.

Place all eligible buildings and districts on the National Register of Historic Places.

Develop regulations regarding demolition of significant commercial structures that are outside the scope of local historic districts.



The protection of existing historic buildings is essential to preserving Decatur's identity



Regulations should be developed regarding the demolition of historic buildings outside local historic districts

ENVIRONMENT & OPEN SPACE

A vast number of comments were received during the public involvement process regarding the importance of environmental sustainability and green space in Decatur. Many of these comments are reflected in the following recommendations.

Environment Policies

Support the expansion of urban gardening opportunities. Urban gardening benefits the community by promoting physical activity, bringing neighbors together, improving food quality, and keeping dollars local. In addition, it begins to change society's relationship to food in a positive, sustainable way. Efforts to expand urban gardening could include increased community garden sites, creation of a neighborhood tool bank, information sharing, removing regulatory barriers, material support, or expanded farmer's markets.

When building public facilities, design them to achieve LEED or equivalent certification and to assure quality construction that will serve the community for 50 years.

Expand the use of more sustainable lighting options on streets and within city parks and public areas.

Support the installation of alternative fuel source stations in public or semi-public places.

Support efforts to convert traffic signals to low-energy LEDs and implement a pilot program for LED street lights.

Support educational programs to encourage individual support of environmental sustainability programs such as the Kilowatt Crackdown.

Acquire and expand greenspace holdings when opportunities and resources are available.

Environment Projects

Develop a citywide sustainability plan. The should be developed with the assistance of the environmental sustainability board to address issues such as the creation of a climate action plan, initiatives such as an ordinance to limit motor vehicle



Community gardens bring people together and strengthen community bonds



Solar lighting can reduce energy consumption

idling, and roof color standards to reduce the heat island effect.

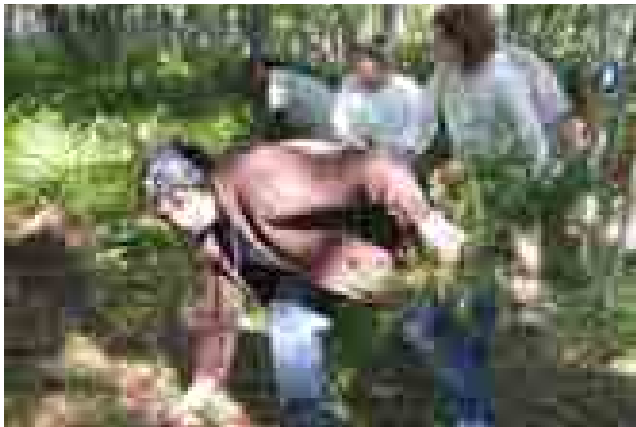
Update and create a unified land development ordinance that requires sustainable building practices.

Complete energy conservation audits of city facilities.

Purchase additional alternative fuel vehicles for city use.

Expand the existing recycling program. This should include commercial properties and address the need to dispose of unique and/or hazardous materials like paint, motor oil, and electronics.

Create an urban forest management plan. This should assess Decatur's existing tree canopy, recommend strategies for protection, maintenance, and new tree plantings, and revise the city's tree ordinance.



Invasive plant removal can start to restore native ecosystems, while strengthening community bonds

PUBLIC FACILITIES

Pursue the redevelopment of the Beacon Hill complex to provide for improved police and court facilities that support the productivity and effectiveness of our police force.

Create an updated storm water management plan. Continue to upgrade the storm water system and pursue opportunities for shared storm water detention systems as well as shared retention systems that can serve as public amenities.

Adopt a long-range maintenance schedule for parks and greenspace. This will assure that facilities and fields are maintained and repaired, and that greenspace areas and trails are well managed.

Conduct stream bank restoration and naturalization of stream channels. Install signs along each creek to increase public awareness.

Remove all invasive plant species from city property and ban the sale of invasive species on city property.

Adopt light pollution guidelines to lessen the impact of light sources on the night sky.

Install additional dog waste bag stations in public places and along streets to reduce the amount of dog waste that pollutes streams.

Install active living facilities in parks and public spaces to promote physical activity and human interaction among all age groups.

IMPLEMENTATION



IMPLEMENTATION

Implementation of the vision for the future of Decatur as set forth in this document should occur according to the Action Matrix provided on the following page. The Action Matrix lists recommended projects along with schedules, cost estimates, possible funding sources, and those parties responsible for implementation.

Schedules range from immediate to over ten years in duration. This extended timeline will require that ongoing attention and priority is given to the plan and its implementation. As such, continued citizen involvement and input as exhibited throughout the study process will be essential to the long-term success of the plan.

City staff should track projects and maintain milestone dates and deadlines to help keep projects on schedule and moving toward completion. This effort will aid elected officials in establishing policies and setting priorities for funding and implementation of the projects outlined in the Action Matrix.

The Atlanta Regional Commission requires LCI studies to be updated every five years. This will be important, not only to maintain eligibility for transportation implementation funding, but to update the Action Matrix and any other aspects of the plan based on progress made and any new circumstances.

Ongoing communication and cooperation between citizens and elected officials is a vital component in an effective implementation plan. Making sure that this plan is available to and regularly consulted by city staff and others will help ensure momentum.

The Atlanta Regional Commission has committed to making funding available for the implementation of transportation-related recommendations. The City of Decatur should work with the Atlanta Regional Commission to ensure that projects requiring transportation funds are included in future Regional Transportation Plans, which are revised every five years. Most of these funds will require a 20 percent local match, which will most likely come from the city's general fund.

Realizing the plan's vision requires a long-term commitment. The plan's future vision cannot be achieved overnight, and if it is not consulted and reviewed regularly, it risks becoming obsolete.

As the City of Decatur moves forward with implementation, it is important to remember the following. While the vision may be unlikely to change in the near future, it is important that the community recognize that the vision/plan can and will change over time. The future addition or subtraction of policies or projects should not be viewed as a compromise of the vision, but rather its natural evolution in response to new conditions.

Many of the assumptions used to guide this process, including the economic climate, land costs, transportation costs, transportation funding programs, and development trends, are never fixed. Decatur must be prepared to respond to changes in order to ensure an ongoing relevant plan.

The Action Matrix on the following page uses the following abbreviations. All cost estimates are in 2011 dollars.

- CCTMA: Clifton Corridor Transportation Management Association
- GDOT: Georgia Department of Transportation
- GF: City of Decatur General Fund
- GO: City of Decatur General Obligation Bonds
- LCI: Livable Centers Initiative funds
- MARTA: Metropolitan Atlanta Rapid Transit Authority

Transportation Action Matrix

ID	Description	Type	Engineering Year/Cost	ROW Year/Cost	Approx. Length (ft)	Construction Year/Cost	Contin-gency	Total Costs	Responsible Parties	Pot. Funding Sources	Local Source & Match Amount
T-1	Commerce Drive road diet Phase 1 (between Church and Clairmont)	Ped/Bike	2012	\$50,000	n/a	n/a	\$400,000	\$500,000	City, GDOT	LCI, GDOT	GF, GO \$100,000
T-2	Commerce Drive road diet Phase 2 (between West Trinity and Clairmont)	Ped/Bike	2013	\$75,000	n/a	n/a	\$600,000	\$750,000	City, GDOT	LCI, GDOT	GF, GO \$150,000
T-3	Commerce Drive road diet Phase 3 (between Church and East College Ave)	Ped/Bike	2015	\$150,000	n/a	n/a	\$1,200,000	\$1,500,000	City, GDOT	LCI, GDOT	GF, GO \$300,000
T-4	Commerce and Clairmont intersection improvements	Ped/Bike	2012	\$140,000	n/a	n/a	\$1,120,000	\$1,400,000	City, GDOT	LCI, GDOT	GF, GO \$280,000
T-5	Commerce and Church intersection improvements	Ped/Bike	2012	\$140,000	n/a	n/a	\$1,120,000	\$1,400,000	City, GDOT	LCI, GDOT	GF, GO \$280,000
T-6	East Trinity Place - Phase V Streetscape	Ped/Bike	2011	\$50,000	n/a	n/a	\$400,000	\$500,000	City	LCI, GDOT	GF, GO \$100,000
T-7	100 block of Clairmont Ave pedestrian improvements/road diet	Ped/Bike	2012	\$40,000	n/a	n/a	\$200,000	\$250,000	City, Private	City, Private	n/a
T-8	500 block of Church Street pedestrian improvements/road diet	Ped/Bike	2012	\$40,000	n/a	n/a	\$200,000	\$250,000	City, Private	City, Private	n/a
T-9	Church Street pedestrian improvements (Commerce Drive to city limit)	Ped/Bike	2012	\$310,000	n/a	n/a	\$2,480,000	\$3,100,000	City	LCI, GDOT	GF, GO \$620,000
T-10	Oakhurst Village pedestrian improvements	Ped/Bike	2011	\$100,000	n/a	n/a	\$800,000	\$1,000,000	City	City, LCI	GF, GO \$200,000
T-11	South Columbia Street multi-use path	Ped/Bike	2015	\$200,000	2016	\$250,000	\$1,600,000	\$2,000,000	City, GDOT, PATH	LCI, GDOT	GF, GO \$400,000
T-12	Howard Avenue pedestrian improvements	Ped/Bike	2017	\$420,000	n/a	n/a	\$3,360,000	\$4,200,000	City	LCI, GDOT	GF, GO \$840,000
T-13	South Candler/East College/East Howard intersection improvements at RR	Ped/Bike	2012	\$160,000	n/a	n/a	\$1,280,000	\$1,600,000	City, GDOT	LCI, GDOT	GF, GO \$320,000
T-14	McDonough/West College/West Howard intersection improvements at RR	Ped/Bike	2012	\$110,000	n/a	n/a	\$880,000	\$1,100,000	City, GDOT	LCI, GDOT	GF, GO \$220,000
T-15	North McDonough Street road diet - Phase IV Streetscape	Ped/Bike	2011	\$120,000	n/a	n/a	\$1,760,000	\$2,200,000	City	LCI, GDOT	GF, GO \$440,000
T-16	West College/West Howard/Atlanta intersection improvements at RR	Ped/Bike	2015	\$190,000	n/a	n/a	\$1,520,000	\$1,900,000	City, GDOT	LCI, GDOT	GF, GO \$380,000
T-17	Traffic calming on neighborhood conservation streets	Ped/Bike	ongoing	\$150,000	n/a	n/a	\$1,200,000	\$1,500,000	City	LCI, GDOT	GF, GO \$300,000
T-18	Clairmont Avenue complete street improvements	Transit/Ped/Bike	2018	\$310,000	n/a	n/a	\$2,480,000	\$3,100,000	City, CCTMA, MARTA, GDOT	LCI, GDOT	GF, GO \$620,000
T-19	College Avenue pedestrian improvements	Ped	2015	\$200,000	n/a	n/a	\$1,600,000	\$2,000,000	City, GDOT	LCI, GDOT	GF, GO \$400,000
T-20	Scott Boulevard sidewalks (west side)	Ped	2013	\$10,000	n/a	n/a	\$200,000	\$250,000	City, GDOT	City, GDOT	GF, GO \$50,000
T-21	Extend pedestrian tunnel under College Avenue	Ped	2020	\$200,000	n/a	n/a	\$400,000	\$500,000	City, GDOT	City, LCI, GDOT, Private	GF, GO \$1,000,000
T-22	ADA upgrades around transit stations and schools	Ped	ongoing	\$150,000	n/a	n/a	\$2,400,000	\$3,000,000	City	LCI, GDOT, SRTS, MARTA	GF, GO \$600,000
T-23	South Candler Street bicycle lanes	Bike	2014	\$150,000	n/a	n/a	\$1,200,000	\$1,500,000	City, GDOT	LCI, GDOT	GF, GO \$300,000
T-24	MARTA bike facilities and downtown bike station	Bike	2014	\$20,000	n/a	n/a	\$80,000	\$100,000	City, MARTA	City, MARTA	n/a
T-25	Sharrows on connecting streets to transit stations and activity centers	Bike	ongoing	\$20,000	n/a	n/a	\$400,000	\$500,000	City	City	n/a
T-26	Circulator shuttle	Transit	2018	\$1,000,000	n/a	n/a	\$800,000	\$10,000,000	City, CCMTA	City, CCMTA, MARTA, LCI	GF, GO \$2,000,000
T-27	New street from Derrdown Way to Sams Street north of Craigie Street*	New Street	2016	\$60,000	2017	\$200,000	\$440,000	\$550,000	City	City	n/a
T-28	New street in Montgomery Street right of way	New Street	2014	\$44,000	2015	\$100,000	\$352,000	\$440,000	City, Private	City, Private	n/a
T-29	Updated parking standards	Parking	2012	n/a	n/a	n/a	n/a	Admin.	City	City	GF Admin.

*This project lies partially outside the Decatur city limits

POPULATION/EMPLOYMENT PROJECTIONS

The table below shows the number of residents and jobs expected in the Decatur area every year for the next three decades. Data come from the Atlanta Regional Commission, and the analysis area may not correspond exactly to the current Decatur city limits. Figures for years between 2010 and 2040 are based on simple interpolation.

It should also be noted that, according to the 2010 U.S. Census, Decatur had 19,335 residents. According to the 2009 U.S. Census, there were 14,529 jobs within the Decatur city limits.

Year	Population (est.)	Employment (est.)
2010	18,300	10,571
2015	19,659	11,386
2020	21,019	12,202
2025	22,378	13,017
2030	23,737	13,832
2035	25,097	14,648
2040	26,456	15,463

Source: Atlanta Regional Commission, Tunnell-Spangler-Walsh & Assoc.

CONSISTENCY WITH LCI COMPONENTS

This study and its recommendations are consistent with the components of the Livable Centers Initiative as outlined below.

1. Efficiency/feasibility of land uses and mix appropriate for future growth including new and/or revised land use regulations needed to complete the development program.

The framework of this study allows Decatur to build on its existing efficient and feasible mix of land uses. The framework plan supports a continuation of the mix of uses in a way that is compatible with the existing urban fabric. Zoning changes recommended on page 32 will help implement the vision.

2. Transportation demand reduction measures.

Increased density, more mixed uses, road diets, pedestrian improvements, updated parking regulations, new street connections, and bike improvements will help reduce the demand for



The recommendations of this study will move Decatur even further toward embodying the goals of the Livable Centers Initiative

vehicular trips. Collaboration with the existing transportation management association will also help reduce demand.

3. Internal mobility requirements – traffic calming, pedestrian circulation, transit circulation, bicycle circulation including safety and security of pedestrians.

Pedestrian improvements on a number of streets and intersections include traffic calming measures and elements to promote pedestrian and bicycle circulation with a focus on safety. Existing transit circulation is satisfactory, and pedestrian/bicycle conditions in many cases are excellent.

4. Mixed-income housing, job/housing match and social issues.

Housing types and sizes for people of a variety of ages and incomes are recommended by this study. This is accomplished by recommending a holistic approach to affordability that takes energy and transportation costs into account, and by allowing a diversity of housing types to attract a diversity of residents.

It is also recommended that housing be affordable so that those who work in Decatur can afford to live in Decatur. While many jobs exist in the study area, it is recommended that new businesses be attracted to help balance jobs and housing.

In addition, proposed public and private improvements will help provide disadvantaged groups better access to parks, public facilities, services, and public transit.

5. Continuity of local streets in the study area and the development of a network of minor roads.

Continuity of local streets is already strong in many locations, but is proposed to be enhanced through the creation of new streets with redevelopment, enhanced railroad crossings, and sidewalk improvements that bridge physical and psychological gaps in connectivity.

6. Need/identification of future transit circulation systems.

Decatur is one of the most transit-rich areas in the region, but proposed pedestrian and bicycle improvements will enhance access to existing rail and bus service. This study reinforces the recommendation for a circulator shuttle to link downtown with other neighborhoods.

7. Connectivity of transportation system to other centers.

Excellent rail and bus connections exist between Decatur and most major centers in the region, including Emory University and the Centers for Disease Control and Prevention, Downtown and Midtown Atlanta, the airport, Buckhead, and Perimeter.

Recommendations focus on enhancing connections to local centers such as civic buildings, residential neighborhoods, and commercial areas.

8. Center development organization, management, promotion, and economic restructuring.

The study area already benefits from a number of active organizations that promote and manage. Proposed economic restructuring focuses on redevelopment of existing land with more intense uses and attracting a more diverse mix of housing, residents, and new jobs.

9. Stakeholder participation and support.

The public outreach process for the Decatur 2010 Strategic Plan was conducted concurrently with the LCI Study update. As one of the largest outreach efforts in the region's history, it allowed significant numbers of people to contribute ideas that were directly incorporated into the recommendations, and that were endorsed and supported by the community.



Stakeholder participation and support were key in developing the recommendations of this study

10. Public and private investment policy.

Successful implementation of the plan depends on a marriage of public and private investment policy, in which significant public investments in transportation improvements and other areas are complemented by private investments in redevelopment, new streets, new jobs, and other areas. Projects may draw from a variety of funding sources city, state, and federal dollars; non-profit investment; and private sources.

ECONOMIC AND MARKET ANALYSIS



DOWNTOWN DECATUR LCI STUDY:

ECONOMIC AND MARKET ANALYSIS



PREPARED FOR:

Tunnell Spangler Walsh
City of Decatur

PREPARED BY:

Market + Main, Inc.

DECEMBER 2010

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Purpose of Analysis

The purpose of this analysis is to examine the socioeconomic and real estate market trends in the Downtown Decatur LCI Study Area, and determine how they may impact the potential for development and redevelopment. Both the positive and negative influences affecting the area are considered in this analysis for the purpose of identifying opportunities to enhance declining areas and to capitalize on positive trends. Market + Main, Inc. is contracted with Tunnell Spangler Walsh to deliver the Economic and Market Analysis component within the Decatur LCI Study.

This document has nine sections, as outlined below.

STUDY AREA CHALLENGES & ASSETS: Listing of challenges and assets that need to be addressed or leveraged related to the Study Area.

MARKET DEFINITION: Details the market areas that are examined, including the Study Area, Primary Market Area, and Secondary Market Area, and how they are defined.

SOCIOECONOMIC ANALYSIS: Examines population and employment trends related to the metro Atlanta region and the Study Area. Also reviews demographics for the Study Area, Primary Market Area, and Secondary Market Area.

RESIDENTIAL MARKET ANALYSIS: Reviews metro Atlanta market and Study Area characteristics related to residential development trends and inventory. Forecasts demand based on household growth and recommends product type by tenure in five-year increments.

RETAIL MARKET ANALYSIS: Reviews metro Atlanta market and Study Area characteristics related to retail development trends and inventory. Forecasts demand based on household growth and potential retail sales, and recommends scale of retail along with type of goods in five-year increments.

OFFICE MARKET ANALYSIS: Reviews metro Atlanta market and Study Area characteristics related to office development trends and inventory. Forecasts demand based on ratio of office-to-total employment and employees-to-square footages and recommends space allotments for office in five-year increments.

INDUSTRIAL MARKET ANALYSIS: Reviews metro Atlanta market and Study Area characteristics related to industrial development trends and inventory. Forecasts demand based on current usage patterns, as appropriate.

CATALYSTS: Description of recommended priority projects.

APPENDIX: Tables and charts that provide statistical detail for analyses contained in this document; also provides longer-term forecasts than those highlighted in the narrative analysis.

Study Area Challenges & Assets

There is potential for development and redevelopment in the Study Area. However, as in every community, there are challenges that need to be addressed and assets that need to be recognized. A consistent circumstance in terms of planning, market analysis, and economic development is that, many times, issues are just opportunities in hiding. Meaning that what seems like a negative might easily be turned into a positive for the community with an adjustment in perspective and a leveraging of resources. That is why it is important to face challenges, recognize them, come to understand them, and implement actions to change them in order to move the Study Area forward in the long-term. These issues and opportunities are based on stakeholder interviews, market assessment, and feedback at public meetings.

CHALLENGES

- Lack of easy highway access
- Scarcity of developable land
- Lack of convenience retail within the City
- Perception of downtown parking problems
- Congested roadways at certain times of the day
- Lack of large corporate employers
- Economic and tax base limited by relatively small geographic area within city limits
- Relatively high property taxes
- Lack of affordable single-family housing
- Scarcity of newer rental multi-family housing
- Lack of newer office space
- Struggling townhome/condo market

ASSETS

- Highly regarded public school system
- Direct access to MARTA rapid rail transit
- Very strong city services
- Small town character
- Local small shops with a variety of offerings
- Family-friendly reputation
- County seat of major urban county
- Proximity to colleges and universities
- Exceptionally strong line-up of restaurants
- Pedestrian-friendly downtown
- Highly educated population
- City residents loyal to local independent businesses
- Active and involved citizens
- Abundance of festivals and events
- Variety of historic structures
- Reputation for open and effective local government

Market Definition

To determine the potential for new uses or support for existing and expanding uses, it is important to first understand who the market is. Understanding the demographic and economic characteristics of the residents and workers in the area is critical in understanding why the market is where it is, how the market can develop, whether it is under-served or saturated, and what would be supportable. It is also important to review the historic trends that have occurred in the area, as well as considering what is currently being projected to happen in the area in the future. All of these characteristics go into formulating what kind of development can be supported and how much can be supported. While the numbers begin to craft the backdrop for the story of the Study Area, they certainly can not effectively convey the entire story. The final recommendations will be based on a mixture of quantitative and qualitative analyses. Maps of these areas are on immediately following pages.

STUDY AREA

The Study Area is based on individual parcel boundaries surrounding downtown Decatur. For reference, it is roughly bordered on the south by Howard Avenue, which runs along the railroad tracks. On the west it is bounded by Commerce Drive from Howard Avenue north to West Trinity Place. Other streets on the western boundary are West Trinity Place, Waters Street, West Ponce De Leon and Northern Avenue. The northern boundary of the Study Area roughly follows Commerce Drive and Bell Street, and the eastern boundary is formed by Commerce Drive and Sycamore Street.

PRIMARY MARKET AREA

The Primary Market Area is defined by a 5-minute drive time from the intersection of East Trinity Place and North McDonough Street. On average, residents are willing to drive less than five minutes (usually between two and three miles) for convenience retail, such as groceries, sundry items, dry cleaners, etc. This drive is usually shorter in urban areas where uses are more closely located. This area is primarily comprised of residents of the immediate area, or workers from businesses located in the area, in search of convenience-related goods and services. Restaurant customers would most likely be those making spontaneous decisions to eat out or pick something up for dinner that evening.

SECONDARY MARKET AREA

The Secondary Market Area is defined by a 10-minute drive time from the intersection of East Trinity Place and North McDonough Street. This area is where the majority of customers will come from. These consumers will be looking for some convenience retail, but will also be searching for community, and even regional, retail options; these will be planned or destination-related shopping trips. These customers will be willing to travel further distances for unique goods and services, something they cannot find close to their own homes or businesses. Restaurant customers will be looking for the same elements: unique foods or selections; unusual atmospheres; white-tablecloth restaurants; or popular meeting places.

STUDY AREA MAP



PRIMARY MARKET AREA MAP



SECONDARY MARKET AREA MAP



Socioeconomic Analysis

REGIONAL POPULATION AND EMPLOYMENT TRENDS

As is well documented, the Atlanta Region experienced very strong growth in both population and employment over the past two decades. While the current economic downturn has caused a dramatic slowdown in population and job growth, projections call for continued growth once economic conditions improve.

POPULATION

Over the past several decades, metro Atlanta has experienced tremendous population growth. In fact, the Region has more than doubled its size over the past thirty years, with total population estimated at almost 5.5 million in 2010. Population in the 20-county Atlanta Region grew by 39% between 1990 and 2000, and the area has grown by an additional 28% between 2000 and 2010. This growth, however, has not always been steady, with population increases affected by cyclical economic trends. The Atlanta Region was able to move out of the recession of the early 1990s pretty quickly, based on a diversified economic base. The current economic downturn, however, has had a strongly negative impact on population growth. Between 2008 and 2009, the ten “core” counties added only 24,700 new residents, the smallest increase in population since the Atlanta Regional Commission began estimating population for the ten counties in 1990. Even so, the overall story for the Atlanta area is one of strong growth. Between 2001 and 2009, the Atlanta region was the second-fastest growing metro area in the country, adding approximately 1.1 million people during that time.

Population growth in metro Atlanta has not taken place evenly across the Region. Historically, most of the growth within the Region has been in more suburban locations, so it is not surprising that the areas with the greatest population increases between 2000 and 2005 were all located outside I-285. While the closer-in counties in metro Atlanta have continued to add new residents, their overall population share has declined relative to the further-out counties. It is important to note, however, that after several decades of population decline, the City of Atlanta has experienced relatively strong growth in recent years, with its population increasing by five percent since 2000. Because of the Region’s strong suburban growth patterns, population density across the metro area continues to be low, in comparison to other large metropolitan cities, but it is increasing.

During the 1980s and 1990s, the north side of town experienced roughly 75% of the Region’s total growth. Since the mid-1990s, growth has accelerated on the south side (with I-20 as the demarcation line) as congestion has increased and land has become more expensive on the north side. Incorporated cities in the Region accounted for less than a third of the area’s population gains between 2000 and 2009.¹

¹ This time frame does not reflect the recent incorporations of cities on the north side, such as Dunwoody, Johns Creek, Milton, and Sandy Springs.

As can be seen in the nation as a whole, the Atlanta Region has been growing more ethnically diverse, and this trend is projected to continue. According to ARC projections, by approximately 2015, there will no longer be a majority racial or ethnic group in the metro area.

The expectation across the Region is for growth to continue, but at rates slower than the enormous expansion that was seen during the 1990s. Total population is expected to increase by three million by 2040, for a total population of almost 8.3 million. Suburban counties are expected to experience the highest growth rates over the next 20 years. However, while the “external” 10 counties are forecast to grow the fastest in percentage terms, the “core” 10 counties will still account for 77% of the total 20-county population in 2030. Further, the five central counties are expected to be basically built-out by 2030.

EMPLOYMENT

Just as with population, the Atlanta Region has experienced very strong employment growth over the last two decades. In 1990, the 20-county Region had over 1.9 million jobs. In 2010, total employment is estimated at almost 2.7 million jobs. Unfortunately, the national economic downturn has had a strongly negative impact on the local economy. Between 2006 and 2009, the Region actually lost almost 128,000 jobs. This job loss since 2006 was so large that it essentially erased all of the job growth from earlier in the decade, with an overall loss of 39,000 jobs since 2000. Job growth and job loss have not occurred evenly across the Region. The vast majority of the employment decline occurred in the 10-county “core” area. The “external” ten counties actually added 57,000 jobs between 2000 and 2009.

The distribution of jobs across the Region is very different from the distribution of population. The heaviest concentrations of employment are located in the areas around and between I-75 North and I-85 North, and in the area surrounding the airport. In general, employment is located closer to the center of the Region. Four of the “core” counties – Clayton, Cobb, DeKalb, and Fulton – have more jobs than workers, while all other counties in the 20-county Region have fewer jobs than workers. Commuting to work is the norm throughout the Region. With the exception of Fulton County, the majority of residents work in a county different from their county of residence.

Once economic conditions improve, it is projected that the Atlanta Region’s employment base will resume a pattern of growth. This future growth is expected to be strong, with total employment projected to reach almost 4.5 million by 2040. This growth rate, however, is much slower than the projected population growth. This disparity can be explained by a decreasing labor force participation rate (the percentage of the working-age population that is actually in the workforce). It is projected that the labor force participation rate will drop from its high in 2000 of 74% to approximately 62% in 2040. This expected decrease in the labor force participation rate is due largely to an increase in the over-65 age group.

ARC’s forecasts indicate that the Region’s economy will still outpace the nation in terms of growth, even though it is not expected to see the phenomenal rates of growth that were experienced in the late 1990s.

STUDY AREA POPULATION AND EMPLOYMENT OVERVIEW

POPULATION

The population of the Study Area is approximately 2,065, which represents an increase of almost 120% since 1990. While population growth in the Study Area has been significant, a lack of developable land, as compared to more suburban locations, caused growth rates to lag those seen in the Atlanta MSA² during the 1990s. Between 1990 and 2000, the Study Area population grew by 12%. During the same time period, the MSA grew by 38%, which was over three times greater than the Study Area. The trends reversed after 2000, as several high-density residential projects were built in the Study Area. This added a great deal of new residents while using relatively little of the area’s scarce land. Consequently, between 2000 and 2010, the growth rate accelerated to 95%. The MSA population grew by 31%, which was less than a third of the Study Area’s growth rate. Over the next five years, it is projected that the Study Area population will increase by almost 10%. While this will be a lower growth rate than the Atlanta MSA, it will still be greater than the national rate of growth.

					CENSUS-BASED		ARC	
	1990	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2010	Change 2010-2015
Study Area/ Greater LCI Area	945	1,060	2,065	2,265	95.2%	9.5%	3.7%	6.4%
Primary Market Area	32,825	34,040	36,380	37,500	6.9%	3.1%	N/A	N/A
Secondary Market Area	180,785	191,910	212,345	221,880	10.6%	4.5%	N/A	N/A
Atlanta MSA/Region	3,069,410	4,247,980	5,569,195	6,182,135	31.1%	11.0%	20.5%	7.9%

Note: The 2010 and 2015 estimates were developed by Market + Main, Inc. utilizing building permit and development information provided by the City of Decatur. US Census Bureau historic estimates and current estimates from Atlanta Regional Commission and Claritas were also examined. However, the estimates in table above do not reflect the forecasts contained in the market sector sections of this report.

Sources: Claritas, US Census Bureau, Atlanta Regional Commission, City of Decatur, Market + Main, Inc.

Census-based statistics primarily use a straight-line projection methodology based on historic trends. This does not always paint an accurate picture of what is actually happening in a community, particularly in urban areas. Thus, estimates and forecasts from the Atlanta Regional Commission (ARC) were also reviewed. ARC’s projections provide a local perspective on what is happening in the Study Area. An annual household growth was

² The Atlanta-Sandy Springs-Marietta Metropolitan Statistical Area (MSA) is made up of 28-counties: Barrow, Bartow, Butts, Carroll, Cherokee, Clayton, Cobb, Coweta, Dawson, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Haralson, Heard, Henry, Jasper, Lamar, Meriwether, Newton, Paulding, Pickens, Pike, Rockdale, Spalding, and Walton.

determined using a combination of Census-based and ARC forecasts and supplemented with local on-the-ground interviews, recent developments, and building permit information provided by the City of Decatur.

EMPLOYMENT

While employment growth is projected to be moderate for the Region, it is still expected to be witnessed in historic employment cores. The Study Area encompasses the downtown core for the City of Decatur. The daytime population within the Study Area is somewhat small, with an employee base of 8,810. However, the role of being the county seat is easily identified in these numbers, as this is still a sizable base for a city the size of Decatur.

The Study Area constitutes less than a half-percent of the Atlanta MSA’s total employment. The Study Area has a much stronger proportion of residents than employees, so the employment rate of growth has been modest. However, the impact of the proportion of daytime population in the Study Area is clear when considering the needs for convenience retail goods and services.

	Study Area	Primary Market Area	Secondary Market Area
Daytime Population	8,810	19,540	109,440
Change in Employment Since 2000	4.7%	5.6%	10.7%

Note: The 2010 estimate was developed by Market + Main, Inc. utilizing employment information provided by the City of Decatur, in conjunction with estimates from the Atlanta Regional Commission and Claritas.
Sources: Claritas, City of Decatur, Market + Main, Inc.

Economies do not function locally, economics is a regional phenomenon. Trying to isolate detailed employment numbers and still retain meaning for them is a difficult endeavor. In terms of sector employment, the Study Area’s largest industry sectors are Services, Public Administration, and Retail Trade. The Atlanta MSA’s top three industry sectors, in terms of employment, are Services, Retail Trade, and Manufacturing. In the Study Area, there are some sectors that are unusually small, such as Construction, Manufacturing, and Wholesale Trade.

Industry Sector	Study Area	Atlanta MSA
Construction	0.8%	5.3%
Manufacturing	0.6%	8.2%
Transportation/Communications/Utilities	1.8%	5.2%
Wholesale Trade	0.4%	5.3%
Retail Trade	11.1%	22.9%
Finance/Insurance/Real Estate	4.5%	7.8%
Services	40.7%	38.7%
Public Administration	40.1%	6.6%

Source: Claritas.

Workers in the Study Area are predominately employed in the Services and Public Administration sectors. The Services sector is similar for both the Study Area (40.7%) and the MSA (38.7%). However, the Public Administration sector is remarkably different when comparing the Study Area to the MSA. For the Study Area, the Public Administration sector accounts for 40.1% of employment, but for the MSA it represents only 6.6% of employment. Because the Public Administration sector in the Study Area is so much greater than in the MSA, all other categories, except Services, are much smaller in the Study Area than in the MSA. Retail Trade is the third largest employment sector in the Study Area at 11.1%, but it is still less than half of the MSA proportion of 22.9%.

STUDY AND MARKET AREA DEMOGRAPHIC OVERVIEW

As the edges of the Atlanta Region have spread further and further from the core of the City of Atlanta and as traffic has grown progressively worse, many residents have begun to value the convenience of living in established areas located closer to the heart of the region. As a result, many intown areas have been rediscovered over the past two decades and have enjoyed a renaissance. The Study Area is at the heart of one of these growing intown areas since it basically encircles Decatur's downtown core, and the surrounding area has seen a great deal of redevelopment, along with a significant amount of new development as well.

When interpreting the demographic data for the Study Area, it is important to take note of some particular characteristics that will impact demographic statistics.

- There is a significant number of senior housing units for the size of the Study Area, though this makes sense in an urban core. This housing type will often tend to skew ages higher, income levels lower, and possibly educational levels lower, especially when included in a fairly low base population.
- The residential development in the Study Area is largely mid- to- high density, in comparison to the surrounding area. This likely increases the singles population, which can make income levels appear lower since there is only one-person in the household earning income, as opposed to two or more.
- There is also a universal data limitation for small area estimates that should be mentioned here. The process is simple – a boundary is drawn and calculations are made based on proportions of census tracts included. Thus, the close proximity of the public housing development could have some effect on statistics for the Study Area.

On page 13 is a table that illustrates the key demographic and economic elements of the markets being considered in this analysis. Those that deserve specific highlighting include the following.

- The current population in the Study Area is estimated to be 2,065. For the Primary Market Area, the population estimate is 36,380 and for the Secondary Market Area it is 212,345.
- Population in the Study Area increased by 95.2% between 2000 and 2010. This growth rate was over twenty times greater than for the City of Decatur (4.4%) as a

whole. It was also much greater than the growth rate for the nation (9.8%) and the Atlanta MSA³ (31.1%).

- While there was substantial population growth in the Study Area between 2000 and 2010, there were three age brackets that actually lost population: the 5-to-9 age group, the 10-to-14 age group, and the 25-to-34 age group. The largest population increase was in the 55-to-64 age group, which grew by 121.4%. The age 85-and-older group had the second greatest increase, in percentage terms, at 62.5%.
- The population of the Study Area is expected to increase by 9.5% between 2010 and 2015.⁴ This projected growth rate is almost twice that of DeKalb County and is over four times the City of Decatur's growth rate. It is, however, below the MSA rate of 11.0%.
- While the overall population of the Study Area is projected to increase over the next five years, all age groups between the ages of 10 and 34 are expected to decrease. In 2010, these age brackets make up 26.2% of the Study Area population. By 2015, it is projected that they will represent only 22.7%.
- The Study Area's school-age population (13.8%), including ages 5 to 17 years old, is below the Atlanta MSA (18.9%) and national (17.4%) proportions.
- There is a solid proportion of retirement age and elderly people in the Study Area, with 20.3% of residents age 65 or older. This is much greater than the percentage found in the City of Decatur (13.1%), the Atlanta MSA (8.9%), and the nation (13.2%). Not surprisingly, the average age in the Study Area (42.8) is somewhat higher than in the City of Decatur (40.1) and a great deal higher than the Atlanta MSA (35.3) and national (37.7) averages.
- The over-65 population in the Primary and Secondary Market Areas is much lower, on a percentage basis, than in the Study Area. In the Primary Market Area it is 12.4%, and in the Secondary Market Area it is 10.5%, compared to 20.3% in the Study Area.
- The trend of an aging population within the Study Area is expected to continue. Over the next five years, the three fastest growing age brackets in the Study Area all consist of those aged 55 or older. The 65-to-74 age category is projected to increase by 30.4%, the 55-to-64 category by 26.5%, and the 85-and-over category by 23.1%. Those who are over age 65 are projected to increase from 20.1% of the Study Area population in 2010 to 21.7% in 2015. This will lead to an increase in the average age of the Study Area population from 42.8 in 2010 to 44.3 in 2015.
- It is interesting to note that educational attainment levels within the Study Area are high at both extremes. Approximately 16.6% of the Study Area population has not graduated from high school, which is higher than the rates for the City of Decatur (10.6%), the MSA (13.0%), and the nation (15.3%). However, residents of the Study

³ The Atlanta-Sandy Springs-Marietta Metropolitan Statistical Area (MSA) is made up of 28-counties: Barrow, Bartow, Butts, Carroll, Cherokee, Clayton, Cobb, Coweta, Dawson, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Haralson, Heard, Henry, Jasper, Lamar, Meriwether, Newton, Paulding, Pickens, Pike, Rockdale, Spalding, and Walton.

⁴ This Study Area population projection does not reflect the forecasts contained in the market sector sections of this report; it is based on information from US Census Bureau, Claritas, and Atlanta Regional Commission.

Area with a college degree make up 45.8% of the population, which is much higher than the Atlanta MSA (34.2%) and the nation (27.5%). This percentage is, however, lower than the rate for the City of Decatur (58.3%) as a whole.

- The per capita income (perhaps the most important statistic to review in terms of understanding how a community is *really* doing) in the Study Area (\$25,210) is 93.3% of the national average. Over the next five years, per capita income in the Study Area is projected to grow to \$27,440, but it will still be only 93.2% of the national average. In other words, the Study Area's growth in per capita income will keep pace with the nation, but growth will not be strong enough to make up for any of the current shortfall. It is important to note, however, the strong growth in PCI since 2000, when the Study Area figure was \$16,510, representing only 76.5% of the national average.⁵
- The per capita incomes in the Primary and Secondary Market Areas are much higher than in the Study Area, and also much higher than the MSA and national figures. Per capita income in the Primary Market Area is 135.0% of the national average, and for the Secondary Market Area, it is 113.4% of the national average. This is important because the trade areas represent the actual potential customers for goods and services within the Study Area.
- Almost half (49.8%) of the Study Area's households earn less than \$25,000 annually. This is well over twice the percentage for the City of Decatur (21.1%) and the nation (22.3%), and it is almost three times the Atlanta MSA (16.8%) rate.
- A fairly small percentage (11.6%) of the Study Area's households earns over \$100,000 on a yearly basis. This compares to 28.2% in the City of Decatur, 23.8% in the Atlanta MSA, and 20.1% in the nation. The household income figures for the two trade areas are much stronger than for the Study Area. In the Primary Market Area, 28.1% of households earn over \$100,000. For the Secondary Market Area, the figure is 21.2%.
- The average household income in the Study Area is \$46,660, which is less than the Atlanta MSA (\$79,200) and national (\$71,070) averages. Over the next five years, the average household income in the Study Area is projected to increase to \$51,110; but this will still be substantially lower than the national figure of \$77,470. The trade area average incomes are much higher. For the Primary Market Area, the average household income is \$83,180, and for the Secondary Market Area it is \$73,060.
- The average household size of the Study Area is 1.87, which is much lower than the City of Decatur (2.13), the Atlanta MSA (2.73), and the nation (2.59). It is not surprising that the proportion of single-person households in the Study Area (56.7%) is a great deal higher than the rate for the City of Decatur (39.5%) and over twice the national (26.0%) and MSA (22.4%) percentages.
- The average household size of the Primary Market Area (2.19) and the Secondary Market Area (2.30) are much more in line with the City, MSA, and national averages. Likewise, the single-person household figures for the Primary Market Area (37.3%)

⁵ The location of the public housing development adjacent to the Study Area likely has an impact on all of the income statistics reviewed here, skewing them downwards.

and Secondary Market Area (36.2%) are much lower than the percentage in the Study Area, and closer to the rates for the City, MSA, and nation.

Study Area	Primary Market Area	Secondary Market Area
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SIZE OF MARKET

Residents	2,065	36,380	212,345
Households	1,055	15,765	87,485
Daytime Population	8,810	19,540	109,440

CHARACTERISTICS OF MARKET

AGE			
Under 18	19.7%	19.4%	20.5%
Between 25 & 35	9.2%	11.1%	15.2%
Over 65	20.3%	12.4%	10.5%
INCOME			
Per Capita Income (PCI)	\$25,210	\$36,500	\$30,660
PCI as % of National Average	93.3%	135.0%	113.4%
Change in PCI since 2000	52.7%	25.9%	25.8%
Household Incomes \$25,000 - \$49,999	19.5%	21.6%	25.9%
Household Incomes Above \$100,000	11.6%	28.1%	21.2%
Average Household Income	\$46,660	\$83,180	\$73,060
Change in Avg HH Income since 2000	43.1%	27.0%	26.3%
HOUSEHOLDS			
Average Household Size	1.87	2.19	2.30
Single-Person Households	56.7%	37.3%	36.2%

PROJECTED GROWTH OF MARKET

Census-Based, 2010-2015	9.5%	3.1%	4.5%
ARC, 2010-2015	6.4%	N/A	N/A

Sources: Claritas, US Census Bureau, Atlanta Regional Commission, Market + Main, Inc.

Detailed demographic and economic information can be found in the Appendix.

Residential Market Analysis

METRO OVERVIEW

The current economic slowdown began with the housing sector, and the impacts of this housing contraction are still being felt after several years. While the overheated markets of the West coast, the Northeast, and Florida were the first to feel the effects of the downturn, the market meltdown eventually reached just about every region of the nation. While there have been some modest improvements over the past year, a large number of foreclosures continue to work their way through the system, and they hold down values in many areas of the country. Even with the indications of a possible upturn, it is not yet clear whether the residential market has reached a “bottom.” According to the National Association of Realtors, pending home sales continued their increase in October 2010. In October, the Pending Homes Sales Index⁶ rose to 89.3. This was a 10% increase over the September figure, but it was still 26% below the October 2009 figure.

In a recent article, the National Association of Realtors’ chief economist warned that it may take a long time for the housing market to fully recover. “Home sales will remain soft in the months ahead, but improved affordability conditions should help with a recovery. But the recovery looks to be a long process. Home buyers over the past year got a great deal, and buyers for the balance of this year have an edge over sellers. For those who bought at or near the peak several years ago, particularly in markets experiencing big bubbles, it may take over a decade to fully recover lost equity.”⁷

While metro Atlanta was not one of the residential markets with the most dramatic run-up in prices, it has, nevertheless, been greatly impacted by the current downturn. Because the metro area had been growing rapidly for years, the residential construction industry was a large part of the regional economy. As demand for housing softened, the industry was not able to pull back quickly enough on providing new supply. The result was a large inventory of unsold new homes across the metro area.

Building permits are typically a good indicator of future strength or weakness in the housing market. Residential developers typically adjust their pace of construction based on the level of interest that they are seeing from potential buyers or renters. Nationally, building permits issued through October 2010 were up 6% over the same period in 2009, while permits in the Atlanta MSA⁸ were up 20%. Taken alone, these figures would seem to indicate a possible resurgence of the housing market. However, these growth rates are somewhat misleading because they are based on increases from 2009 figures, which are a

⁶ The Pending Home Sales Index is a leading indicator for the housing sector, based on pending sales of existing homes. A sale is listed as pending when the contract has been signed but the transaction has not closed, though the sale usually is finalized within one or two months of signing.

⁷ Source: “Pending Home Sales Rise.” National Association of Realtors, September 2, 2010.

⁸ The Atlanta-Sandy Springs-Marietta Metropolitan Statistical Area (MSA) is made up of 28-counties: Barrow, Bartow, Butts, Carroll, Cherokee, Clayton, Cobb, Coweta, Dawson, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Haralson, Heard, Henry, Jasper, Lamar, Meriwether, Newton, Paulding, Pickens, Pike, Rockdale, Spalding, and Walton.

small fraction of historic norms. Between 2005 and 2009, the total building permits issued nationally decreased by 73%, and for metro Atlanta, the decrease was 91%. It would take many years with exceptionally strong growth rates just to get back to the levels of building permit figures from 2005, and currently there is no indication that this rate of growth is imminent.

	2005	2006	2007	2008	2009
US TOTAL	2,155,300	1,838,900	1,398,400	905,400	583,000
Single-Family	1,682,000	1,378,200	979,900	575,600	441,100
Multi-Family	473,300	460,700	418,500	329,800	141,900
ATLANTA MSA TOTAL	72,900	68,300	44,800	19,300	6,500
Single-Family	61,600	53,900	31,100	12,000	5,400
Multi-Family	11,300	14,400	13,700	7,300	1,100

Source: US Census Bureau.

The median sales price for single-family homes has dropped dramatically since the beginning of the recession, and this decrease can be seen in both metro Atlanta and the nation. The national median sales price for a single-family home was \$177,900 for third quarter 2010, according to the National Association of Realtors. This represents a decrease of 18% from the median sales price of \$217,900 in 2007. For the Atlanta MSA, the median sales price was \$113,500 for third quarter 2010, a 12% decrease since the same time in 2009. The change in median sales price for the Atlanta MSA is 34% below the 2007 median sales price of \$172,000. Further, the Atlanta MSA's median single-family home sales price constitutes 64% of the national average today; by comparison, the MSA was at 79% of the national average in 2007.

STUDY AREA CHARACTERISTICS

The greater Decatur area, as defined by the 30030 zip code, has been heavily developed for several decades and is largely built-out. Even so, the area has seen significant residential construction over the past few years. Between 2005 and 2009, over 600 new housing units were built and sold in this zip code.⁹ This fairly strong residential growth in an area with little available land was accomplished through both single-family infill development and high-density condominium and townhome projects. Both of these development types are typically more difficult and more expensive than building on greenfield sites at the edge of a metro area. Consequently, the abundance of infill and redevelopment projects in the greater Decatur area is a testament to the area's strong housing market. It indicates a demand that is much greater than the available supply.

⁹ Source: Atlanta Journal-Constitution Home Sales Report, Market Data Center.

BUILDING PERMITS

Even though the Decatur area has remained popular with homebuyers, it has not been immune to the national downturn in the housing market. This can clearly be seen in building permit data. For the City of Decatur, residential building permit activity declined 75% between 2000 and 2009. The residential building pace increased steadily from 2000 to its peak between 2005 and 2007. Since 2007, there has been a massive decline, as has been seen across the country. The number of residential building permits decreased 83% between 2007 and 2009.

	TOTAL	Single-Family	Townhome
2010 YTD	15	15	0
2009	16	16	0
2008	19	19	0
2007	95	50	45
2006	93	41	52
2005	166	83	83
2004	43	25	18
2003	45	17	28
2002	27	22	5
2001	58	39	19
2000	65	42	23

Note: Year-to-Date (YTD) is January 1, 2010 to October 8, 2010.

Source: City of Decatur.

Only single-family permits were issued in 2008 and 2009, as well as January through October 2010; which is not stunning since across the metro area, and nationally, financing for multi-family projects has been extremely difficult to secure.

RESIDENTIAL SALES – SINGLE-FAMILY¹⁰

One can clearly see the effects of the housing downturn in DeKalb County by looking at average sales price trends. Between 2005 and 2009, the average sales price for a single-family home in DeKalb County peaked in 2007 at \$226,500. By 2009, the average had decreased to \$144,700, which was 36% below the 2007 level. In the first eleven months of 2010¹¹ the average sales price actually increased to \$151,400 but this was still well below the average for any year between 2005 and 2008.

While the effects of the housing downturn can also be seen in the City of Decatur, the decrease in average sales price has been much less severe than in DeKalb County. In 2007, the City's average sales price was 68% higher than the County's average sales price. By

¹⁰ Source: Georgia Multiple Listing Service.

¹¹ 2010 home sales figures include transactions closed between January 1, 2010 and November 23, 2010.

2009, Decatur's average sales price was 140% higher than DeKalb County's average. Local sales agents give several reasons for the relative strength of Decatur's housing market; but consistently they list Decatur's highly-acclaimed city school system along with the City's vibrant and pedestrian-friendly downtown as the two most important drivers of the local housing market.

Just as in the County, the average sales price in the City of Decatur peaked in 2007, before decreasing in both 2008 and 2009. The 2009 average sales price was \$347,300, which was 9% below the 2007 peak of \$380,800. On the positive side, even with the decreases, the 2009 average was still 12% higher than the 2005 average sales price of \$310,600. Between January and November 2010, there was an uptick in the average sales price to \$355,700. While this is an increase over the 2009 figure, it is still below the 2008 average.

The total number of homes sold in DeKalb County steadily decreased between 2005 and 2009. In 2009, there were 6,400 homes sold in DeKalb County, which was 24% below the 2005 figure of 8,400 homes sold. In the City of Decatur, 270 homes sold in 2006, which was a slight increase over the 2005 figure. Between 2006 and 2009, the number of homes sold decreased every year, ending with approximately 145 homes sales in 2009. However, there has been a small upturn in home sales in 2010. Between January and November 2010, slightly more homes have sold than in all of 2009.

The "average days on the market" statistic captures the length of time that it takes for a home to sell. This can be an important indicator of the health of a housing market. Once again, the City of Decatur performs much better than DeKalb County. Between 2005 and 2009, the average days on the market in the City of Decatur ranged from 61 days to 70 days. For the same time period in DeKalb County, the average days on the market never dropped below 71 days and peaked at 88 days in 2008. This statistic improved in the first eleven months of 2010 for both the City and the County. In DeKalb County the average was 73 days, which was the lowest since 2006. For the City of Decatur, the average decreased to 53 days, which was far lower than any other year reviewed (2005 to 2010).

The City of Decatur is located in the 30030 zip code, and the zip code is not a great deal larger than the city boundaries. Consequently, one would not expect to see a lot of difference in sales statistics between the two areas. There is, however, a noticeable and consistent difference in average sales price between the City of Decatur and the larger 30030 zip code. Between 2005 and 2009, the City's average sales price was 8% to 12% higher than the zip code average sales price. Even though this difference is significant, it does not tell the whole story. Because all of the City's sales are also included in the zip code figures, the true difference in sales price between those inside and outside the city limits is much greater. According to local real estate agents, this sizeable difference in average sales price can largely be attributed to the perceived superiority of the Decatur City schools as compared to the nearby DeKalb County schools. Apparently, many home buyers are willing to pay a sizeable premium to have access to the City school system and other City services.

RESIDENTIAL SALES – CONDOMINIUMS AND TOWNHOMES¹²

Over the past four years, there has been a significant decline in sales of existing and new condominiums and townhomes in the City of Decatur. The number of sales peaked in 2006 at approximately 165 units and has declined every year since, reaching a low of 65 sales in 2009. This represents a decrease of over 60% from the peak. While this drop is dramatic, it is important to note that the pool of existing condominiums and townhomes is relatively small, so the introduction of even one large new development can have a fairly dramatic effect on overall sales statistics.

While the changes in average sales price for condominiums and townhomes have been somewhat erratic, the up-and-down movements have not been extreme, even during the housing downturn. The lowest average sales price was in 2006, when the figure was \$204,200. The average sales price peaked in 2007 at \$218,800. Looking at the first eleven months of 2010,¹³ the average sales price was \$213,000, representing a decrease of 2.6% from the peak average sales price in 2007, but still well above the 2006 figure.

Since 2005, the average days on the market for condominiums and townhomes has made dramatic swings. This figure reached its lowest point in 2007 at 103 days and its highest point between January and November 2010 at 177 days. It is worth noting that the average days on the market has been much higher for condominiums and townhomes than for single-family homes. This indicates a stronger single-family demand in the City of Decatur, most likely because of supply constraints.

EXISTING RESIDENTIAL

Even though the Study Area encompasses some of the most heavily developed commercial areas in the City of Decatur, it still has a fairly large proportion of residential uses as well. The majority of these housing units are condominiums, along with a smaller number of townhomes, senior housing units, and small apartment buildings. There are very few single-family homes located within the Study Area boundaries.

The Study Area condominium market is dominated by several large developments located in the heart of downtown Decatur along Ponce De Leon Avenue. Major condominium communities in this area include Town Square, Decatur Renaissance, 335 West Ponce, and The Artisan. All of these properties were built since 2000; taken together, they represent almost 500 condominium units. The Artisan is the newest of these developments, and its second phase still has a few unsold units. The newer condominium projects in the Study Area follow an urban development pattern with buildings situated adjacent to the public sidewalk and parking located in attached structured decks. All of the buildings also include first-floor retail space.

PLANNED RESIDENTIAL

The following projects have received necessary approvals from the City of Decatur, but have not yet begun construction. Because of uncertainty in the financial markets, it is not

¹² Source: Georgia Multiple Listing Service.

¹³ 2010 home sales figures include transactions closed between January 1, 2010 and November 23, 2010.

uncommon for there to be a considerable lag time between governmental approvals and the start of construction for large-scale development.

315 West Ponce De Leon Avenue

Current plans call for the construction of 160 units adjacent to an existing office building.

235 East Trinity Place

Current plans call for 210 units as part of a mixed-use development with retail, restaurant, and office space, along with structured parking.

101 West Ponce De Leon Avenue

Current plans call for 170 units and restaurant space.

432 East Howard Avenue

Current plans call for 65 units.

DEVELOPMENT OUTSIDE THE STUDY AREA

The Study Area is surrounded by single-family neighborhoods, many with historic homes featuring unique architecture. These neighborhoods have become very popular with homebuyers as intown living has grown more desirable over the past twenty years. While the single-family homes in these neighborhoods are not direct competition for the Study Area condominiums, their popularity and strong average sales price are indirectly responsible for the downtown condominium development. Construction costs for urban-style condominiums with structured parking are very high and require strong sales prices to make the numbers work. This type of condominium development typically only makes sense when nearby single-family neighborhoods have become fairly expensive and out of the reach of many buyers.

Currently, there is not significant apartment development within the Study Area. There are, however, a few notable apartment communities located just outside the Study Area boundaries. This includes the Avery Glen Apartments and the Ice House Lofts. The Ice House Lofts consists of almost 100 units. The Avery Glen Apartment development has almost 120 units, but a portion of these are reserved for students at Agnes Scott College. Both of these properties report occupancy rates close to 100%. There is also a concentration of garden-style apartment communities along DeKalb Industrial Way, which is fairly close to the Study Area. Most of these apartment complexes report occupancy above 95%. Leasing agents for the apartment communities located near the Study Area consistently list two primary reasons that tenants choose to rent in the area: proximity to downtown Decatur with its extensive lineup of shops and restaurants and easy access to MARTA rapid rail stations.

DEMAND ANALYSIS

Given that the Study Area is mostly built-out and policy and public support is showing support for higher density residential, consideration was given to the potential to capture new residents from outside the Study Area. The downtown core of Decatur is a draw for the surrounding area, and the sales levels and rental rates in the area have indicators of more demand than supply, particularly near the town center. Thus, a determination was made to proceed with a more aggressive residential demand analysis, which seems supportable in the market, but will also have to be achieved through supportive municipal policies.

ASSUMPTIONS

In order to determine the level of demand for residential product that the Study Area can support, some assumptions had to be made. An average annual growth of 90 households was used, based on forecasts from the Atlanta Regional Commission, along with growth trends over the past ten years drawn from other sources. It is important to note that this growth rate is somewhat aggressive and based on the assumption that in the future, residential development in the Study Area will largely take the form of mid- to high-density projects. If local policy decisions discourage high-density housing, and development stays “as is,” the average increase would likely be less than 20 new households per year.

Key assumptions were also made about tenure characteristics and housing preferences. Because of high land prices, it is unlikely that there will be any significant new single-family or even townhome development within the downtown core. It is assumed that 75% of new housing in the Study Area will be rental, with the balance being owner-occupied. This somewhat higher rental proportion is based on the new dynamics and current realities of the housing market: currently financing for condominiums can not be secured, condominiums have become a difficult product to sell, and many potential homeowners are renting by choice. Additionally, the local market dynamics support more rental, as surrounding apartment occupancy rates are very high, particularly those in walking distance to the downtown core. It is also important to note that it is possible over the next ten years for the proportion of owner-occupied housing units to be higher, as credit markets become more active.

Assumptions on annual household growth; tenure characteristics (owner versus renter), housing preferences, and residential product trends were then reconciled to produce the final residential demand preferences.

	TENURE PROPORTION		ANNUAL DEMAND		FIVE-YEAR DEMAND		TEN-YEAR DEMAND	
	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	0%	0%	0	0	0	0	0	0
Single-Family Attached	5%	0%	1	0	5	0	10	0
Multi-Family (Condo/Apt)	95%	100%	21	68	105	340	215	675
Total Units			22	68	110	340	225	675
			90		450		900	

As stated above, these projections are somewhat aggressive and represent an almost doubling of housing units in the Study Area over the next ten years. Projections are based on the continuance of the mid- to high-rise development patterns that have predominated in the Study Area over the past ten years, but largely dependent on continued policy decisions, public support, and local market demand.

RECOMMENDED DEVELOPMENT

Because there is little available land in the Study Area and land costs are high, any housing development will most likely have to be fairly dense. There may be a few limited opportunities for attached single-family (townhome) product in the Study Area, but most new housing will have to be in multi-family developments, whether apartments or condominiums. Because of the housing downturn, any multi-family developments built in the foreseeable future will most likely have to be rental communities. As the housing market strengthens, there will likely be the opportunity for additional condominium development.

New multi-family communities should follow the same urban development patterns already found in the Study Area, including buildings located adjacent to the sidewalk, structured parking, and first-floor retail uses. However, there should be as much variety as possible with unit size and type, and also with architecture. Different developments should include everything from studio units to three-bedrooms, and architecture should range from traditional to industrial loft. This variety will widen the pool of prospective renters and buyers and create a stronger and more stable market over time.

Retail Market Analysis

METRO OVERVIEW

Just as the rest of the nation, metro Atlanta's retail market is under pressure from the current economic downturn. Since much of the performance of the retail market is heavily dependent on consumer confidence and the economy as a whole, it is not surprising that retail forecasts for the foreseeable future are discouraging. There are certainly many reasons that industry experts are expecting consumer spending and retail leasing activity to remain slow, such as foreclosures, high debt levels, and job losses, among others.

As metro Atlanta's unemployment rate has hovered above 10%, consumers have cut back on their purchases and given up many luxuries. This has led some retailers to shelve expansion plans and, in some cases, close existing stores. It is not surprising then that the metro Atlanta retail market had negative absorption of over 400,000 square feet during the first three quarters of 2010.

As the demand for shop space has softened, a significant amount of metro Atlanta retail space is being converted to other uses, including churches and schools. According to CoStar, so far in 2010 some of the largest lease signings for retail space were: a 135,000 square-foot lease signed by Passion City Church for the former Home Depot Expo store in Buckhead; a 71,000 square-foot deal signed by Peachtree Hope Charter School at Parkview Station in DeKalb County near Kirkwood; and a 63,000 square-foot lease signed by Corinthian College for the former Cub Foods at Greenbriar Mall.

Even with negative absorption, retail space has continued to be delivered in the marketplace. Through the first three quarters of 2010, over 220,000 square feet of space was added to the metro Atlanta market, with an additional 590,000 square feet under construction. While this square footage is significant, it is very low by historical standards. In 2006, at the height of the market, almost 10.8 million square feet of retail space was delivered in metro Atlanta.

As a whole, the retail market in metro Atlanta consists of a total of 18,964 buildings, representing approximately 321.9 million square feet, with a 10.6% vacancy rate. The average rent per square foot is \$13.77. The total space can be classified into five categories: general retail (39%); mall (9%); power center (8%); shopping center (43%); and specialty center (1%).¹⁴

The Study Area is located within the Decatur/East Atlanta retail submarket.

The Decatur/East Atlanta retail submarket has a total of 685 buildings, reflecting approximately 8.0 million square feet of retail space. The total space in this submarket can be classified into three categories: general retail (56%); power center (9%); and shopping center (35%). The vacancy rate in this submarket is 10.3%, which is basically on par with the metro Atlanta rate. The average rent per

¹⁴ Source: *The Retail Report: Atlanta Retail Market*, CoStar Group, Third Quarter 2010.

square foot is \$12.18, which is lower than the metro average. This submarket has experienced negative absorption of approximately 106,400 square feet for year-to-date. There has been no space delivered in this submarket year-to-date; there is no retail space currently under construction, according to CoStar.

STUDY AREA CHARACTERISTICS

The Study Area encompasses the City of Decatur's historic downtown core and includes a great deal of retail space. Decatur's downtown is one of the most vibrant and successful small downtowns in metro Atlanta and has a wide variety of restaurants and retailers. According to CoStar, there is approximately 477,000 square feet of retail space in the Study Area. The vacancy rate is 9.7%, which is slightly less than the submarket rate. Local agents and building owners report rental rates that range from approximately \$15.00 to \$25.00 per square foot, which is substantially higher than the submarket and metro rental rates. It is important to note, however, that these are quoted rental rates. Several landlords report accepting partial rent from existing tenants who are struggling to stay in business during the economic downturn.

The median year built for retail buildings in the Study Area is 1956. In general, the oldest retail buildings are located around the historic courthouse square. While the Study Area includes many historic buildings, there has also been a fairly significant amount of new retail development over the past two decades, often as part of mixed-use projects. There is not, however, a great deal of land available for future retail development.

Retail uses in the Study Area are found in a great variety of building types. There are historic shop buildings, retail spaces on the first floor of newer residential and office buildings, free-standing retail businesses, and former homes that have been converted to retail use. Even with this great variety of building types, most follow the area's established urban development pattern with retail located directly adjacent to the public sidewalk, and parking located behind the building or completely offsite. There are, however, exceptions to this, including the Commerce Square shopping center and the Kroger grocery store on Commerce Drive. Both of these developments include parking lots in front of their shop space, following a more suburban development pattern, with the exception of the CVS outparcel.

In the larger metro-wide and national economies, retail has suffered greatly during the economic downturn. In interviewing local merchants in the Study Area, one sees a decidedly mixed picture as it relates to economic health. Some merchants have seen little-to-no impact from the economic troubles, while others are struggling or have closed over the past few years. The most successful retailers appear to be those who have an established customer base and who aggressively market themselves. These marketing efforts include social networking, in-store events, and web-based sales.

RESTAURANT CONCENTRATION

One of the most striking features of the Study Area is its incredibly strong concentration of restaurants. Taken together, these restaurants have essentially created an "anchor" for downtown Decatur, creating a regional draw, much like department stores bring consumer

traffic to malls. This strong lineup of restaurants is very difficult to create from scratch and is a fairly unique situation in the metro area. It is, by far, the Study Area's strongest economic development tool for further retail development.

Most local restaurant owners report that they are much more successful at dinner than at lunch. It seems likely that the lunch business is approaching saturation without the addition of more employment in the area. However, it appears that there is still room for additional restaurant growth at dinnertime, as more restaurants could create an even stronger draw for consumers.

RETAIL BY TYPE

There are basically three types of retail functionalities at work in any given market.

- 1. Convenience** – grocery and drug store purchases, as well as some apparel and home items. Usually purchased close to home, based on available selection. Can also include restaurants.
- 2. Regional/Chain** – more likely to be shoppers goods, such as apparel, home items, hobby-related goods, etc., and restaurants. Consumers travel to specific stores based on the consistency of selection and types of goods. The same consistency and familiarity with product is the driving force behind dining out at chain restaurants as well.
- 3. Regional/Unique** – most likely shoppers goods and restaurants. Consumers will drive long distances to go to stores and restaurants that provide goods and services unlike anywhere else. This uniqueness can be specific products, the environment/ atmosphere, or the ability to go to a place that clusters similar goods and services in a hard-to-find fashion.

Convenience retail makes up a fairly small portion of the total retail market in the Study Area. The largest retailers in this category are the CVS drugstore at the corner of West Ponce De Leon Avenue and Commerce Drive and the Kroger grocery store on Commerce Drive. Convenience restaurants in the Study Area include fast food establishments, such as Chick-fil-A, McDonald's, and Dairy Queen.

Regional/Chain retail uses are also a very small portion of the Study Area retail market. In fact, there are almost no major chain retailers located within the Study Area selling goods to a regional market. There are, however, a few chain restaurants that would be considered regional in nature. Examples include Ruby Tuesday, Ted's Montana Grill, and Taco Mac.

Regional/Unique retail is typically the category best-suited to a downtown environment. This retail type thrives in a pedestrian-friendly setting with architectural interest and unique product offerings. The Regional/Unique customer is often buying an experience along with a product. It is not surprising then that Regional/Unique retail makes up the largest proportion of the Study Area's retail. The Study Area has a wide variety of architecturally interesting buildings in a pedestrian-friendly setting. It also has numerous locally-owned stores selling a variety of goods, including clothing, gifts, specialty items, and artwork that cannot be found in chain retailers. The wide range of local restaurants also creates a strong draw for diners from throughout metro Atlanta.

PLANNED RETAIL

The following projects have received necessary approvals from the City of Decatur, but have not yet begun construction. Because of uncertainty in the financial markets, it is not uncommon for there to be a considerable lag time between governmental approvals and the start of construction for large-scale development.

235 East Trinity Place

Approximately 11,200 square feet of retail and restaurant space has been approved by the City as part of a mixed-use development with 210 units and office space.

101 West Ponce De Leon Avenue

Approximately 3,000 square feet of restaurant space has been approved by the City as part of a mixed-use development with 170 units.

DEVELOPMENT OUTSIDE THE STUDY AREA

The Study Area is located in a heavily developed portion of metro Atlanta. It is not surprising then that there is a great deal of retail development just outside the Study Area. There is no question that these projects have the potential to impact what happens within the Study Area, in terms of both redevelopment and development.

While there is not much convenience retail located within the boundaries of the Study Area, there is a great deal located fairly close by. A large Walmart Supercenter is located at the corner of Columbia Drive and Memorial Drive to the south of the Study Area. There are two large Kroger grocery stores nearby, one on DeKalb Industrial Way and the other on Memorial Drive. To the north of the Study Area, at the intersection of Clairmont Road and North Decatur Road, are several strip shopping centers and a Publix grocery store. An additional Publix is located at the intersection of Lawrenceville Highway and North Druid Hills Road.

There is not a lot of Regional/Chain retail in close proximity to the Study Area. However, there is an enclosed shopping center, North DeKalb Mall, located nearby at the intersection of North Druid Hills Road and Lawrenceville Highway. While this mall still has some regionally significant tenants, such as a Macy's department store, most Regional/Chain tenants have left, and it does not currently have significant drawing power. There have been plans to redevelop this mall over the years, but none have come to fruition. The current effort underway is to reposition it as a discount center that will feature big-box retailers and low-cost restaurants. The first step in this transition was the opening of Marshalls in November, and plans are to announce another big-box anchor in first quarter 2011. If North DeKalb Mall is redeveloped into a center that has a regional draw, it would have a great impact on the potential for Regional/Chain retailers in the surrounding area.

As one moves further from the Study Area, there are significant big-box retail developments. One of the newest is the Edgewood Retail District located on Moreland Avenue in the City of Atlanta. This development includes Target, Lowe's, Best Buy, Barnes and Noble, and Office Depot. None of these retailers are found in the Study Area.

The Study Area contains the vast majority of the retailers and restaurants in the larger submarket that would be considered Regional/Unique. There are, however, several other small nodes of this retail type located just outside the Study Area boundaries. One of these nodes is the small business district in the heart of Decatur's Oakhurst neighborhood. This retail area consists mainly of restaurants. From speaking to business owners in Oakhurst, it appears that these restaurants serve more of a neighborhood customer base and do not provide significant competition for the Study Area's restaurants, which tend to draw from a wider trade area. An additional node of Regional/Unique retailers and restaurants is located in East Decatur Station, near the Avondale MARTA station. With further growth, this node could provide some level of competition for Study Area businesses.

DEMAND ANALYSIS

Demand analysis was conducted in relation to two types of retail development: neighborhood serving and community serving. Neighborhood serving retail usually includes convenience goods and personal services for day-to-day needs of the immediate area. Community serving retail serves a slightly larger area, and provides a wider variety of shops, making merchandise available in a greater array of styles and prices, as well as providing convenience goods and personal services.

ASSUMPTIONS

In order to determine the amount of retail space that the Study Area can support, some assumptions had to be made. Demand analysis used the Study Area for the neighborhood serving retail population base; the Primary Market Area was used for the community serving retail population base, and then the proportion that the Study Area could realistically support was determined. The addition of new households computed earlier using the combination of forecasts from the Atlanta Regional Commission and established development patterns was also utilized here. This growth was then used in calculating supportable retail space by reviewing potential retail sales for the areas and estimating target sales per square feet based on national trends.

Currently, there is demand for approximately 521,700 square feet of retail space in the Study Area, based on existing demographics. Over the next five years, this demand is projected to grow to 554,100 square feet. The bulk of retail demand in this case is driven by the Primary Market Area, not the Study Area. A breakdown of the components of this total is shown in the table below, as well as projections for five-year demand. Convenience Goods are primarily grocery store and drug store purchases. Shoppers Goods are the balance of retail items, such as apparel, home furnishings, hobby-related goods, etc. Food and Beverage is primarily restaurants.

	Convenience Goods	Shoppers Goods	Food & Beverage	Retail Demand	
	Existing	Existing	Existing	Existing	Five-Year
Neighborhood Serving	9,800	24,400	8,400	42,600	60,800
Community Serving	57,400	217,600	204,100	479,100	493,300
Totals	67,200	242,000	212,500	521,700	554,100

It is important to note that currently there is approximately 477,000 square feet of retail space in the Study Area, which is 44,600 square feet less than the estimated existing demand. This may appear to be a mistake in light of the area’s vacant space, but supply and demand is not a simple mathematical equation that can be reconciled by considering only the absolute numbers. Instead, it is a study of market dynamics, including customer preferences, quality of retail space, product selection, and location. Consequently, some of the existing vacant retail space in the Study Area may not provide the necessary configuration, quality, or location required to satisfy the demand for additional retail uses. This means that there is likely an opportunity to absorb more retail space than the total demand projections shown in the table above. This also means, however, that some of the older or obsolete shop space may remain vacant.

RECOMMENDED DEVELOPMENT

An overarching recommendation related to retail development is actually related to residential and/or office development. If the desire is to have more retail, different types of retailers, or a more diverse mix of goods and services than exists in the downtown core today, then more people are required. Whether this is achieved through additional residents, additional workers, additional students, or a combination of all of these, an increase in people means an increase in dense development found in the downtown core and an expansion of market size.

Convenience Retail

While there is not currently a great deal of convenience retail located within the Study Area, the demand for this product type has likely been met by the various shopping centers already located in the surrounding area. Efforts to grow this retail category within the Study Area boundaries should focus on finding niche market opportunities. For example, since there are already several full-line grocery stores in the greater area, it would probably be wise to focus recruitment efforts on a specialty grocer that would complement rather than compete with existing stores. The most likely location in the Study Area for additional convenience retail would be on some of the underutilized properties along Commerce Drive.

Regional/Chain Retail

Because of the lack of available land, there is little opportunity for the introduction of big-box stores within the Study Area. There would be sufficient demand, however, for regional chain retailers and restaurants in smaller spaces. While these

chain retailers can sometimes add to the local customer base, the current vibrancy of the Study Area is based on the uniqueness of its offerings. If this uniqueness were ever to be diluted, it could eventually lead to a declining retail and restaurant base.

Regional/Unique Retail

The Study Area's high-quality, locally-owned retailers and restaurants have created one of the strongest urban shopping environments in the metro area. Future retail development should build on this strength, by increasing the draw from outside the Study Area and by encouraging current customers to stay longer, shop in more stores, and spend more money. This can be accomplished by recruiting retailers that complement the existing retail base and that appeal to a similar customer, but provide a different product.

The incredibly strong restaurant concentration in the Study Area should be nurtured and grown. Any further retail development will depend on these restaurants to serve as an anchor to draw potential consumers.

For Regional/Unique retailers to be successful, they require buildings with architecture and design features that are as unique as their goods and services. The Regional/Unique customer is buying an experience as much as a product, and the typical "vanilla box" found in the suburbs will not work well for these retailers. This is an especially important consideration for retail space in the first floor of office and residential properties, where the shop space can sometimes be an afterthought.

Office Market Analysis

METRO OVERVIEW

Similar to the residential and retail markets, the office market has been impacted by the downturn in the economy. Atlanta metro-wide vacancy, currently at 17.6%, has increased every year since 2006, when it was 13.0%. In addition, rental rates have steadily decreased over the last two years, and the market experienced negative absorption of almost 740,000 square feet during the first three quarters of 2010. With so much uncertainty in the broader economy, many business leaders and company decision makers are delaying or postponing transactions in the commercial markets.

However, many office brokers believe that the market has reached its low point in the business cycle and should begin to improve. According to the Research Manager with Jones Lang LaSalle Americas, “Atlanta’s office market has hit bottom since vacancy has basically peaked, which is the first step. Rental rates, however, may continue to fall for another quarter or two, which will cause the market to bounce along the bottom for a little bit. True recovery will come as leasing activity picks up, and this will be driven by job growth.”¹⁵

Due to a current lack of new business growth and expansion, most new leases are the result of existing companies upgrading from one submarket or building to another. As a result, market activity is erratic with some geographic areas and buildings experiencing new lease signings and performing well, while comparable product in a competing submarket remains vacant. As metro Atlanta recovers from the economic downturn, increases in payroll jobs should help support the underlying demand for office space, according to Grubb and Ellis.

The Atlanta office market has 12,931 buildings, comprising about 280 million square feet of space. The average rental rate is \$18.88 per square foot, and the vacancy rate is at 17.6%. The total space can be classified into three categories: Class A (40%), Class B (43%), and Class C (17%).¹⁶

The Study Area is located within the Decatur office submarket. The boundaries of this submarket are much larger than the actual City of Decatur, covering much of the eastern portion of the City of Atlanta and parts of unincorporated DeKalb County.

The Decatur office submarket has 410 buildings, comprising about 6.8 million square feet. The total space can be classified into three categories: Class A (15%), Class B (55%), and Class C (30%). The average rental rate is slightly higher than the metro average, at \$19.44 per square foot. The vacancy rate is 6.5%, which is substantially lower than the metro average. The approximate year-to-date net absorption for this submarket has been a negative 65,000 square feet. No office space has been delivered in this submarket this year, and none is currently under construction, according to CoStar.

¹⁵ Source: “Atlanta’s Office Market Has Hit Bottom.” Atlanta Business Chronicle, August 6, 2010.

¹⁶ Source: *The CoStar Office Report: Atlanta Office Market*, CoStar Group, Third Quarter 2010.

STUDY AREA CHARACTERISTICS

While Decatur now functions as a part of the larger metro Atlanta region, the City originally developed as a standalone community. Consequently, the Study Area has quite a few smaller, older office buildings similar to those that would be found in any small city's downtown. However, over the past several decades, downtown Decatur has also gradually developed into a minor office node for the metro region, with several office buildings larger than 100,000 square feet. While this office development is not insignificant, it is much smaller than other intown office markets. For the sake of comparison, the total square feet of office space in the Study Area is less than 8% of the square footage found in Midtown and less than 5% of the Downtown Atlanta market.

EXISTING OFFICE

Within the Study Area, there are 75 office buildings with almost 1.7 million square feet of space, according to CoStar. Approximately 30% of office space is considered to be Class A. Class B space accounts for 54% of the total, and Class C is 16%. The median year built for office buildings in the Study Area is 1960.

Vacancy in the Study Area is 13.5%, which is substantially higher than the submarket rate but lower than the metro Atlanta rate. Vacancy rates in the Study Area vary greatly by building class. Class B properties have the highest vacancy rate at 16.6%. Class C buildings have the lowest at 4.3%, while Class A properties fall in the middle at 12.8%.

OFFICE TENANTS

Unlike the other major intown office markets, the Study Area does not have a strong contingent of large corporate users. Decatur's office market is dominated by government. The DeKalb County Courthouse is a major economic engine for the Study Area, and a large proportion of Study Area office tenants are law firms, legal support, or companies needing access to the courthouse. Many smaller firms choose the area because of its pedestrian-friendly nature and its wide variety of restaurants.

Leasing agents characterize the Study Area office market as static, with vacancy moving between buildings and little overall growth in the market. One major change has been the movement of higher education into office space. DeVry University and the Art Institute of Atlanta have both located classroom and administrative uses in the One West Court Square building.

Local leasing agents consistently report that the biggest impediment to future growth in the office market is access. Because there is no interstate highway passing through the immediate area, there is a perception that movement into and out of the Study Area is difficult. This negative factor is somewhat mitigated by the MARTA rapid rail station located in the heart of the area. Even so, for metro Atlanta the lack of direct highway access means that most large regional office tenants do not consider Decatur to be a viable option. There is, however, a positive side to the access issues. Decatur has become a very popular housing choice, and this popularity has led many business owners to live in the City. These business owners often also choose to locate their office in Decatur to avoid having to travel each day to other submarkets.

Leasing agents expressed concern that the overall quality of office buildings in Decatur could become an impediment to future growth of the market. Because there haven't been any major office buildings constructed in the Study Area over the past decade, the overall building stock is beginning to age. This could create a competitive disadvantage if improvements are not made or new stock is not delivered to the market to spur competition.

PLANNED OFFICE

The following projects have received necessary approvals from the City of Decatur, but have not yet begun construction. Because of uncertainty in the financial markets, it is not uncommon for there to be a considerable lag time between governmental approvals and the start of construction for large-scale development.

235 East Trinity Place

Approximately 5,500 square feet of office space has been approved by the City as part of a mixed-use development with 210 units and retail and restaurant space.

DEMAND ANALYSIS

Office development for regional office tenants does not perfectly follow a pattern, as perhaps retail following residential tends to. This type of office space is actually one of the most difficult land uses to recruit. There are stringent requirements for access, amenities, location, and agglomeration that are used as guidelines. This basically means that office begets office; office is a use that most often clusters together.

In order to determine the amount of office space that the Study Area can support, some assumptions had to be made.

ASSUMPTIONS

The Study Area already has the beginnings of a minor regional office node and a very attractive amenity base, so it is appropriate to assume the possibility of moderate growth in the office market. With that said, without a major catalyst project, there appears to be little demand for additional office space in the Study Area. Significant growth in the office market will likely require the recruitment of a mid- to large-sized corporate user that can change the dynamics of the local market and create additional spinoff development. For this reason, it is appropriate to look at two demand scenarios for office development, one based on a continuation of existing development patterns and another one based on an aggressive growth strategy.

For both scenarios, demand analysis was conducted using employment projections based on both Atlanta Regional Commission and Census-based projections. The proportion of employment in offices was determined based on metro and national averages. Further, office employment was then translated into square footage based on a ratio of 290 square feet to each employee, a ratio somewhat higher than the national average because of the Study Area's large proportion of older buildings with less efficient floor plates. Over time, the two projections diverge based on whether the Study Area grows solely through local

growth or through capturing a larger proportion of the Primary Market Area employment base.

Static Scenario

The table below assumes a continuation of current office market dynamics and displays existing demand along with projections for five-year and ten-year demand. It is important to note that the existing demand is actually smaller than the current square feet of office space in the Study Area of approximately 1.7 million square feet. This matches the reality of the market based on the Study Area vacancy rate, along with the office space currently being utilized by higher education instead of office. The five-year demand figure reaches just higher than the current building inventory level, while the ten-year demand figure accounts for a possible slight growth in the office market.

Existing Demand	Five-Year Demand	Ten-Year Demand
1,628,000	1,798,000	1,969,000

Dynamic Scenario

The second table below is based on aggressive recruitment of office uses by the City. While the Study Area has the beginnings of a regional office node, along with top-notch amenities, the lack of direct highway access will be an obstacle that must be overcome through marketing, recruitment, and possibly incentives. Under this scenario, existing demand is, of course, the same as under the slower growth scenario, but over the five-year and ten-year periods, it is assumed that the Study Area captures a larger proportion of the Primary Market Area’s employment base.

Existing Demand	Five-Year Demand	Ten-Year Demand
1,628,000	2,000,000	2,373,000

RECOMMENDED DEVELOPMENT

Without a major catalyst user and/or project, there appears to be little demand for additional office space in the Study Area. Significant growth in the office market would require the recruitment of a large corporate user that would change the dynamics of the local market and create additional spinoff development. This would likely be a mid-size employer looking to have their headquarters or marquee location in Decatur. It would be a company whose mission or product would be ideally suited with a Decatur location, which they would leverage as aligning with their values and philosophy. This catalyst for new and increased office demand would likely also already have ties, or benefit from the proximity, to the local universities, such as Emory University, Art Institute of Atlanta, or Agnes Scott College, as well as Centers for Disease Control and Prevention.

Since many of the office buildings in the Study Area are fairly old, new office development will likely be required to overhaul or replace these obsolete buildings over time, even if there is limited growth of the overall office market. Consequently, in the long-term a great deal of new office construction may be required, even with little or no net increase in office space.

Due to the homogeneity of the tenant base, with such high concentrations in legal services, the type of office space available in the local market is all very similar. Future development or redevelopment would also benefit from a purposeful diversity of space in order to attract a more diverse tenant, and thus, business mix.

Because one of the major recruitment tools for downtown Decatur is its pedestrian-friendly nature and its vibrant retail sector, any future office development should enhance these characteristics and extend them into adjacent areas that are not as fully developed as the downtown core. New office buildings should include top-quality retail space on the first floor with entrances directly onto the public sidewalk. The most logical place for this type of development is on underdeveloped parcels on Commerce Drive and North Candler Street in the northeastern portion of the Study Area.

Industrial Market Analysis

METRO OVERVIEW

Much like the office market, the industrial market in metro Atlanta has been severely impacted by the economic downturn. However, there are signs that the market is poised for a modest turnaround. According to the Chief Economist with the National Association of Manufacturers, “When the economy entered recession in the fourth quarter of 2007, 70% of respondents to the NAM/Industry Week Manufacturing Index had a positive business outlook. By the first quarter of 2009, this level of optimism had fallen to just 28%. By the first quarter of 2010, the share of survey respondents with a positive business outlook returned to a level of 70%. In the second quarter 2010 survey, the share that had a positive business outlook rose to 74%, the highest level of confidence since the second quarter of 2007.”¹⁷

With the loss of several large industrial tenants, absorption of industrial space in metro Atlanta has been negative since 2007. An example of this is the 800,000 square foot move-out of Progressive Lighting in Braselton. Fortunately, metro Atlanta has many characteristics that have made it the southeastern hub for transportation, distribution and logistics, such as interstate highways, rail lines, and the airport. For all these reasons, metro Atlanta is still a strong location choice for industry. Moving forward, recent significant move-outs will be offset by large move-ins that should take absorption back into positive territory. Examples include the Phillips-Van Huesen lease for 851,000 square feet at Liberty Industrial Park in McDonough and the Kraft Foods 980,000 square foot build-to-suit facility at Majestic Airport Center in Union City. For existing tenants, blend and extend lease options will be common as tenants look to renew their leases early and renegotiate their lease terms, according to Grubb & Ellis.

With the exception of build-to-suit projects, new construction is very slow and will continue to be so until demand for space increases enough to significantly lower vacancy rates. In the third quarter of 2010, almost one million square feet of industrial space was added to the market, but less than 10,000 square feet was under construction. In 2006, at the height of the market, almost 21 million square feet of industrial space was added to the market.

The Atlanta industrial market has 13,634 buildings and about 619.3 million square feet. The average rental rate is \$3.94 per square foot. The vacancy rate averages to 14.5% for the metro market as a whole. The total space can be split into two dominant sub-types: Flex (10%) and Warehouse (90%).¹⁸

The Study Area is located within the Stone Mountain industrial submarket.

The Stone Mountain industrial submarket has approximately 1,000 buildings, comprising about 29.6 million square feet. The average rental rate is just above the

¹⁷ Source: “The NAM/IndustryWeek Manufacturing Index -- 2nd Quarter 2010.” National Association of Manufacturers.

¹⁸ Source: *The CoStar Industrial Report: Atlanta Industrial Market*, CoStar Group, Third Quarter 2010.

metro average, at \$4.01 per square foot. The vacancy rate is 14.8%, which is on par with the metro average. The year-to-date net absorption for this submarket has been a negative 750,000 square feet. No industrial space has been delivered in this submarket this year, and none is currently under construction, according to CoStar.

STUDY AREA CHARACTERISTICS

There is not a great deal of industrial development in the City of Decatur, and most of the industrial space that is located within the city limits is not within the Study Area boundaries.

EXISTING INDUSTRIAL

There has never been a great deal of industrial development within the Study Area. The small amount of “industrial” space in the Study Area is mainly older buildings that serve local uses, such as automotive repair. There is no true industrial space in terms of manufacturing or distribution facilities. At one time, there were a few small buildings scattered throughout the area that could be classified as industrial. For the most part, all of these buildings have either been demolished or converted into office or retail space.

DEVELOPMENT OUTSIDE THE STUDY AREA

Looking just outside the Study Area, there is a node of small-scale industrial development located in the City near the Avondale MARTA station. However, many of these buildings have come under pressure to be converted to other, more profitable commercial uses. Just outside the city limits in unincorporated DeKalb County to the east of the Study Area, a sizeable concentration of industrial uses are found along East Ponce De Leon Avenue.

PLANNED INDUSTRIAL

There is no planned or approved industrial space within the Study Area currently.

DEMAND ANALYSIS

There does not seem to be a discernable demand for industrial space within the Study Area. Industrial development typically requires sites that are larger than those available in the Study Area, and the local street network is not conducive to industrial traffic.

It is much more likely that any new industrial space would be located along East Ponce De Leon Avenue outside the Decatur city limits. Even in this area, opportunities for industrial growth are limited.

Catalyst Projects

There are many projects and initiatives that can be undertaken in efforts to improve upon the assets of the Decatur LCI Study Area and continue redevelopment efforts. With that said, the projects suggested below should be viewed as the key projects that need to be priorities for the City of Decatur in relation to the Study Area. These projects have the ability to set the Study Area apart, continue to define its character, enforce its role as a destination, and continue positive economic trends. Some are new developments that will be long-term efforts and some are leveraging existing assets to their fullest potential.

Because there is very little developable land left in the Study Area, it is important that future development is strategically planned so that there will be a balance of property types. While there will be a demand for residential, office, hotel, and retail development, without adequate planning, one or more property types could be marginalized in favor of the others. Encouraging a balanced development pattern will create an area that is more likely to remain healthy and stable over the long term.

Again, there are a multitude of projects and programs that can help to move the Study Area forward, the projects below were selected based on market conditions, stakeholder interviews, potential to spur continued development, and leveraging strategic public investments.

COMMERCE DRIVE

(Between Clairemont Avenue and North Candler Street)

The redevelopment of downtown Decatur began in the area around the historic courthouse and then moved east and west along Ponce De Leon Avenue. While located just one block to the north, Commerce Drive has not benefitted from the same level of redevelopment, and has some of the most underutilized properties in the Study Area. Current uses include surface parking lots, fast food restaurants, and a variety of older, smaller buildings. Some of these buildings are vacant and boarded up. On the whole, this area lacks the vibrancy and the architectural interest found in most of downtown Decatur.

While the northern stretch of Commerce Drive has many sites appropriate for redevelopment, property in the area is fairly fragmented. In addition, there are many existing businesses that appear to be economically viable in their current location. For these reasons, it is likely that redevelopment in the area will take place through several smaller-scale projects, instead of one large-scale development.

Development types appropriate for this area would include high-density housing, convenience retail, and multi-story office.

EAST PONCE DE LEON AVENUE

(Between Church Street and North Candler Street)

Some of the first high-density condominium projects built in downtown Decatur are located along East Ponce De Leon Avenue. These developments were built with first-floor restaurant and shop space, which greatly expanded the Study Area's retail base. The new housing units also brought additional residents to the area who added to the downtown consumer population. Unfortunately, even with these attributes, this area has not achieved the vibrancy found around the historic courthouse and in areas along West Ponce De Leon Avenue. There are two key reasons for this. First, retail space along this corridor lacks the architectural interest and variety found in other parts of downtown Decatur. And secondly, the pedestrian nature of East Ponce De Leon Avenue begins to fade as one approaches North Candler Street. There is not a destination or anchor for this quadrant of downtown.

However, there are opportunities to bring more activity to this area. Existing retail space along this stretch of East Ponce De Leon could be retrofitted with unique awnings and signage that would give each business its own identity and add more visual interest to the area. Also, there appears to be an opportunity for additional development in this corridor. On the southwest corner of the intersection of East Ponce De Leon Avenue and North Candler Street is a vacant gas station surrounded by two older office buildings. These three parcels, if combined, would provide a significant site for a new downtown building.

Development types appropriate for this site would be a multi-story building with first-floor retail and either high-density residential or multi-story office located above.

CLAIREMONT AVENUE

(Between West Ponce De Leon Avenue and Commerce Drive)

Located just north of the bustling courthouse square, this one-block stretch of Clairemont Avenue is fairly quiet and lacks the active retail and restaurant market found to the south. This is somewhat surprising considering that the area is home to newer office buildings and Holiday Inn, downtown Decatur's only major hotel. This lack of street-level activity can largely be attributed to the first-floor architecture of some of the newer buildings, with retail entrances that are more hidden than in other parts of the Study Area. However, this area has an interesting mix of buildings and has the potential to become a vibrant subarea of downtown Decatur.

To reach its full potential, this corridor needs a unique identity and a strong visual statement that will draw pedestrians from West Ponce De Leon Avenue. One way to accomplish this would be through the introduction of a major public art project. Another opportunity is an additional hotel facility for a clustering of lodging that can leverage the walkability and retail and restaurant concentration in the town center. A boutique hotel is the most likely fit, catering to a different clientele than Holiday Inn; creating competition and thus, spurring improvement to existing facilities in the area.

An additional possibility to leverage in this area is the increasing student population going to and from classes in One West Court Square, with the locations of Art Institute of Atlanta and DeVry University. There is potential to orient retail in this area towards goods and services for the college student population, creating a 'district' feel within the downtown core. This infill development could add pedestrians, as well as improve both the appearance and reality of more activity and vibrancy to this portion of the street that currently frequently appears inactive.

Development types most likely to accomplish this goal would include an additional boutique hotel and retail and residential infill.

WEST TRINITY PLACE

(Between Commerce Drive and North McDonough Street)

The Callaway Building, a DeKalb County office building, and its adjacent parking lot provide one of the few options for large-scale redevelopment in downtown Decatur. It is located just one block from the heart of downtown and directly across the street from the area's largest structured parking deck. The MARTA rapid rail station is also just one block away. If this property is ultimately redeveloped, care should be taken to make sure that the potential of the site is maximized.

This location provides the largest-scale opportunity for redevelopment in the LCI Study Area. It is an obvious site for mixed use, mixed income development. A mid- to high-density residential component would be a critical piece. It would also make sense to integrate high-quality retail space developed as street frontage space. This seems the best location opportunity for chain retailers with a small-box format to ultimately enter the Decatur market, if that becomes feasible in the long-term with market dynamic changes. There would also be potential for office space to be integrated into the mixed use redevelopment.

Development types appropriate for this site would include residential, office, and retail.

EAST TRINITY PLACE

(Near Intersections with E/W Howard Avenue)

This area was primed for redevelopment through previous efforts of the Downtown Development Authority. Assemblage efforts were undertaken earlier this decade for the previous sites of Relax Inn, My Sisters Room, and DeKalb County PPM building, and the current location of the Dairy Queen. During the intervening years, redevelopment efforts have been successful on the opposite side of East Trinity Place with new restaurant locations and the rehabilitation of the old train depot.

Plans are already approved for a mixed use development on this now mostly vacant site, which includes apartments, restaurant/retail space, and structured parking. Reports are that this project is still intended to move forward, awaiting financing. This catalyst project is included here to reinforce its importance in the downtown core due to location, type of development, and size of assemblage.

SHARED PARKING

In the downtown core, parking is an ongoing challenge for continued successful redevelopment. The likelihood of redevelopment deals are connected to parking through tenant/occupant desires, lending conditions, and municipal policy requirements. Due to land prices and scarcity of developable land, development patterns will either stay in the scale that is seen on the ground today -- one-story with surface parking lots or it will have to “leapfrog” up the ladder to structured parking with associated mid- to high-density development.

In order to incent redevelopment, shared parking or a municipal parking facility should be evaluated. Municipal bond funding for shared structured parking could be utilized as an incentive to lower development costs for developers. Providing this funding could then illicit progress towards municipal goals, such as inclusion of affordable housing, meeting green development standards, open space and additional amenities, among many others.

Appendix

Below are definitions/references that are used throughout this document and in the subsequent detailed tables and charts found in this section.

Study Area – The Study Area is based on individual parcel boundaries surrounding downtown Decatur. For reference, it is roughly bordered on the south by Howard Avenue, which runs along the railroad tracks. On the west it is bounded by Commerce Drive from Howard Avenue north to West Trinity Place. Other streets on the western boundary are West Trinity Place, Waters Street, West Ponce De Leon and Northern Avenue. The northern boundary of the Study Area roughly follows Commerce Drive and Bell Street, and the eastern boundary is formed by Commerce Drive and Sycamore Street.

Primary Market Area – defined by a 5-minute drive time from the intersection of East Trinity Place and North McDonough Street.

Secondary Market Area – defined by a 10-minute drive time from the intersection of East Trinity Place and North McDonough Street.

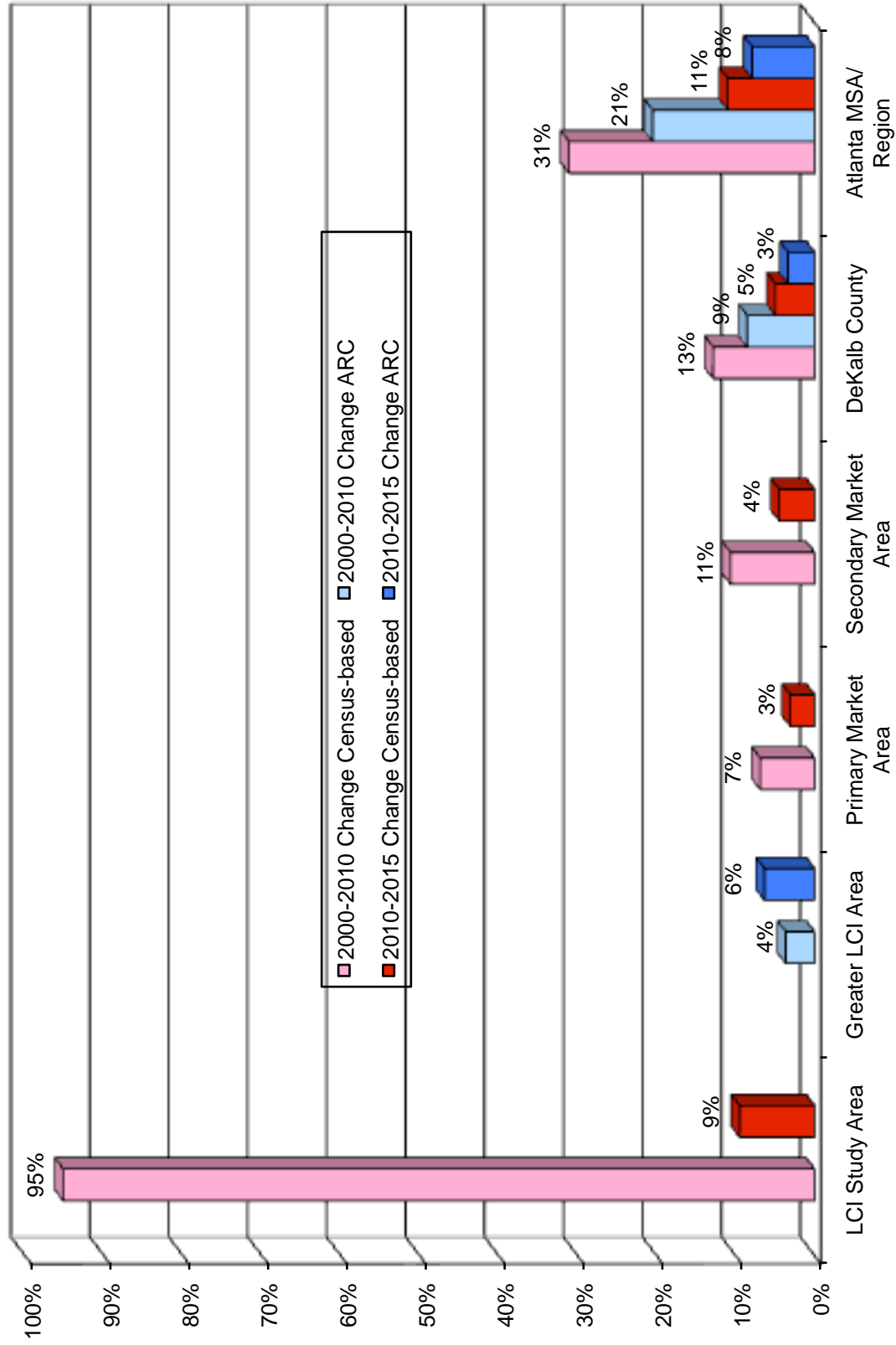
Atlanta Region – Atlanta Regional Commission’s 20-county forecast area, made up of Barrow, Bartow, Carroll, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Hall, Henry, Newton, Paulding, Rockdale Spalding, and Walton counties.

Atlanta MSA – The Atlanta-Sandy Springs-Marietta Metropolitan Statistical Area (MSA) is made up of 28-counties: Barrow, Bartow, Butts, Carroll, Cherokee, Clayton, Cobb, Coweta, Dawson, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Haralson, Heard, Henry, Jasper, Lamar, Meriwether, Newton, Paulding, Pickens, Pike, Rockdale, Spalding, and Walton.

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Population Change, 2000-2015, Comparison of Census-Based and Atlanta Regional Commission Forecasts



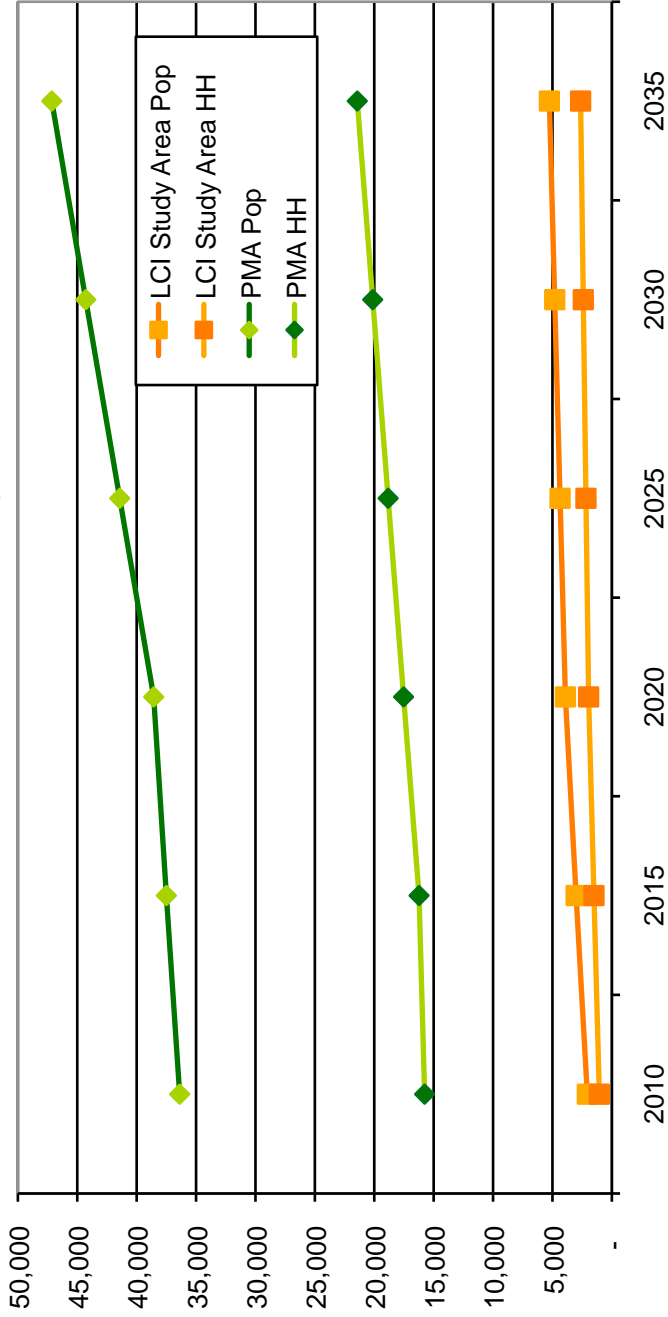
Source: US Census Bureau, Claritas, Atlanta Regional Commission

Population and Household Change Forecasts, LCI Study Area and Primary Market Area, 2010-2035

	Total Change					Average Annual Percent Change				
	2010	2015	2020	2025	2035	2010-2015	2015-2020	2020-2025	2025-2030	2030-2035

LCI Study Area										
Population	2,065	3,010	3,910	4,360	4,810	5,260				
Households	1,055	1,505	1,955	2,180	2,405	2,630				
Primary Market Area										
Population	36,380	37,500	38,566	41,426	44,286	47,146				
Households	15,760	16,230	17,530	18,830	20,130	21,430				

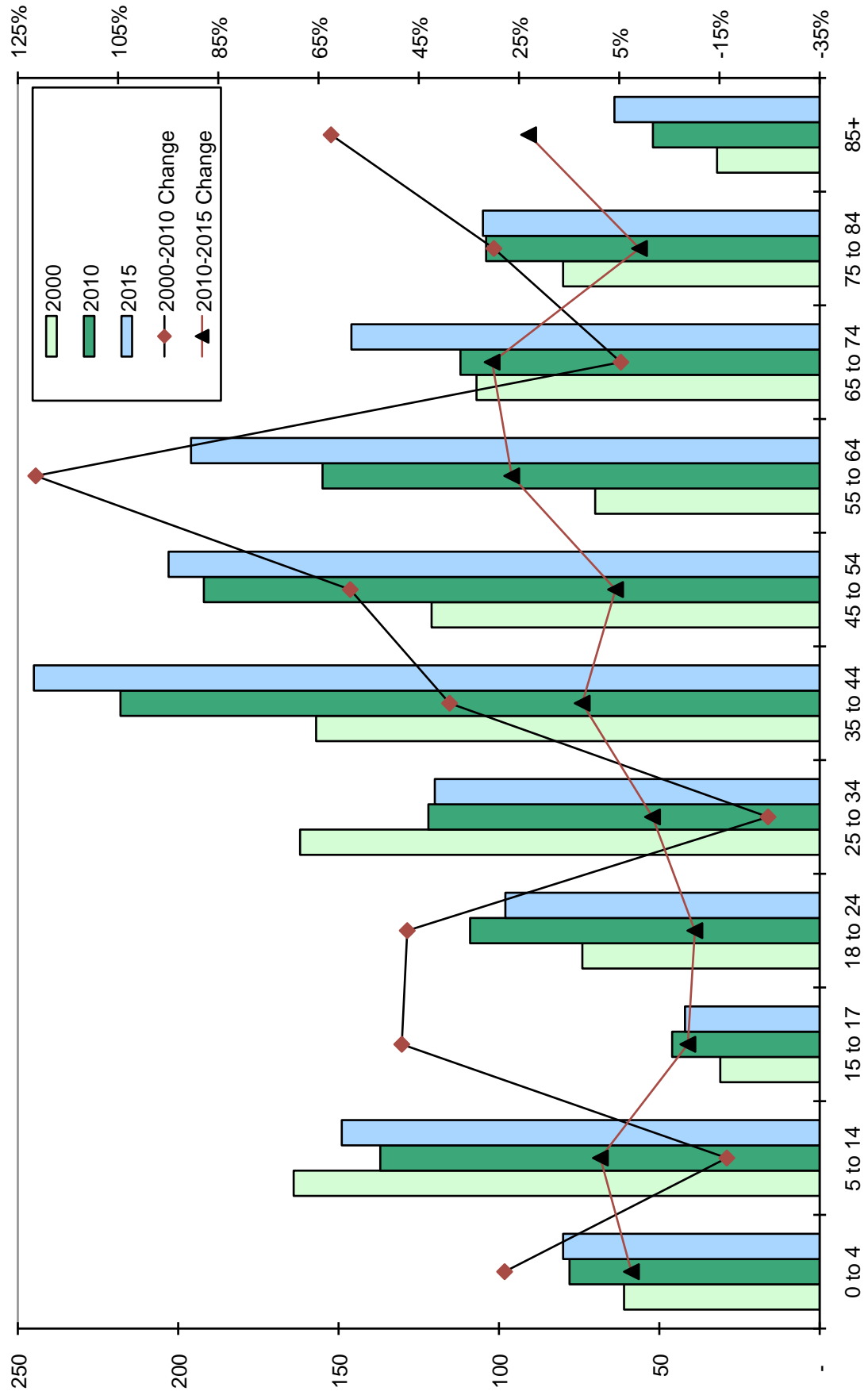
Population and Household Growth Projections, 2010-2035



Source: US Census Bureau, Claritas, Market + Main, Inc.

Note: Study Area projections shown here based on forecasts of market sector potential determined by Market + Main, Inc.

Age Distribution and Change Trends, LCI Study Area, 2000-2015



Source: US Census Bureau, Claritas, Market + Main, Inc.

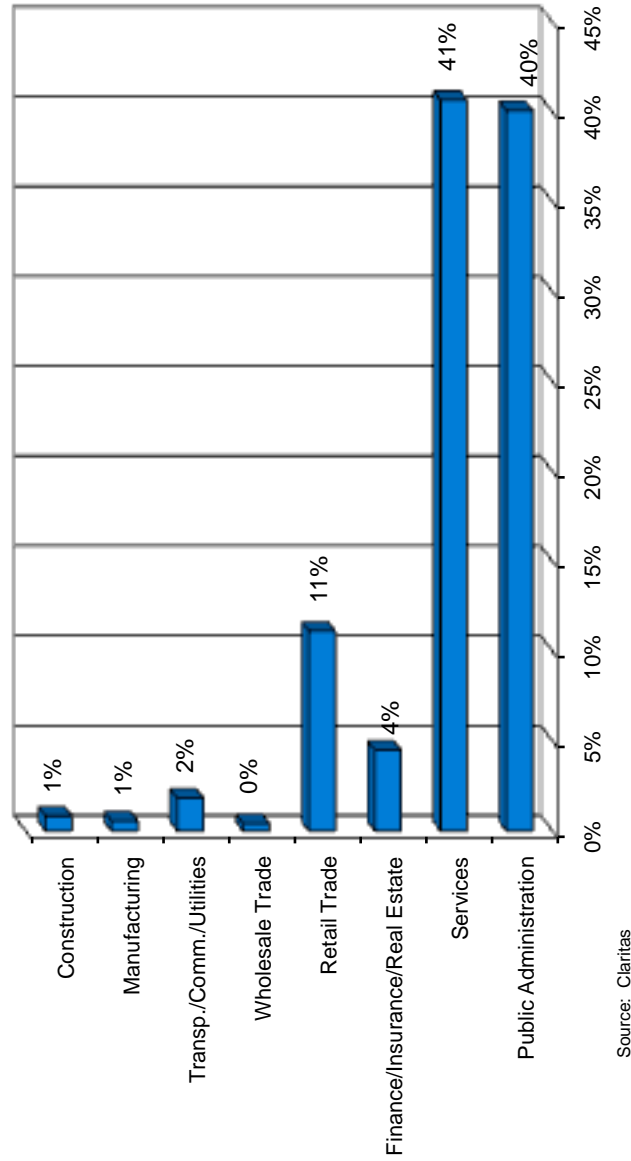
Occupations and Sector Employment, LCI Study Area and Atlanta MSA, 2009

	Study Area	Atlanta MSA
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OCCUPATION	Study Area	Atlanta MSA
Architect/Engineer	5.1%	1.8%
Arts/Entertain/Sports	9.3%	1.9%
Building Grounds Maint	8.6%	3.4%
Business/Financial Ops	10.3%	5.5%
Community/Soc Svcs	0.4%	1.4%
Computer/Mathematical	4.5%	3.5%
Construction/Extraction	1.9%	6.2%
Edu/Training/Library	5.8%	6.0%
Farm/Fish/Forestry	0.0%	0.1%
Food Prep/Servicing	1.9%	4.9%
Health Practitioner/Tec	7.8%	4.0%
Healthcare Support	1.0%	1.4%
Maintenance Repair	2.9%	3.3%
Legal	1.3%	1.3%
Life/Phys/Soc Science	3.1%	0.8%
Management	10.7%	11.7%
Office/Admin Support	8.4%	14.1%
Production	0.0%	4.5%
Protective Svcs	0.0%	2.0%
Sales/Related	8.0%	12.9%
Personal Care/Svc	1.6%	3.0%
Transportation/Moving	0.6%	6.1%

INDUSTRY SECTOR	Study Area	Atlanta MSA
Construction	0.8%	5.3%
Manufacturing	0.6%	8.2%
Transp./Comm./Utilities	1.8%	5.2%
Wholesale Trade	0.4%	5.3%
Retail Trade	11.1%	22.9%
Finance/Insurance/Real Estate	4.5%	7.8%
Services	40.7%	38.7%
Public Administration	40.1%	6.6%

Sector Employment, LCI Study Area, 2009

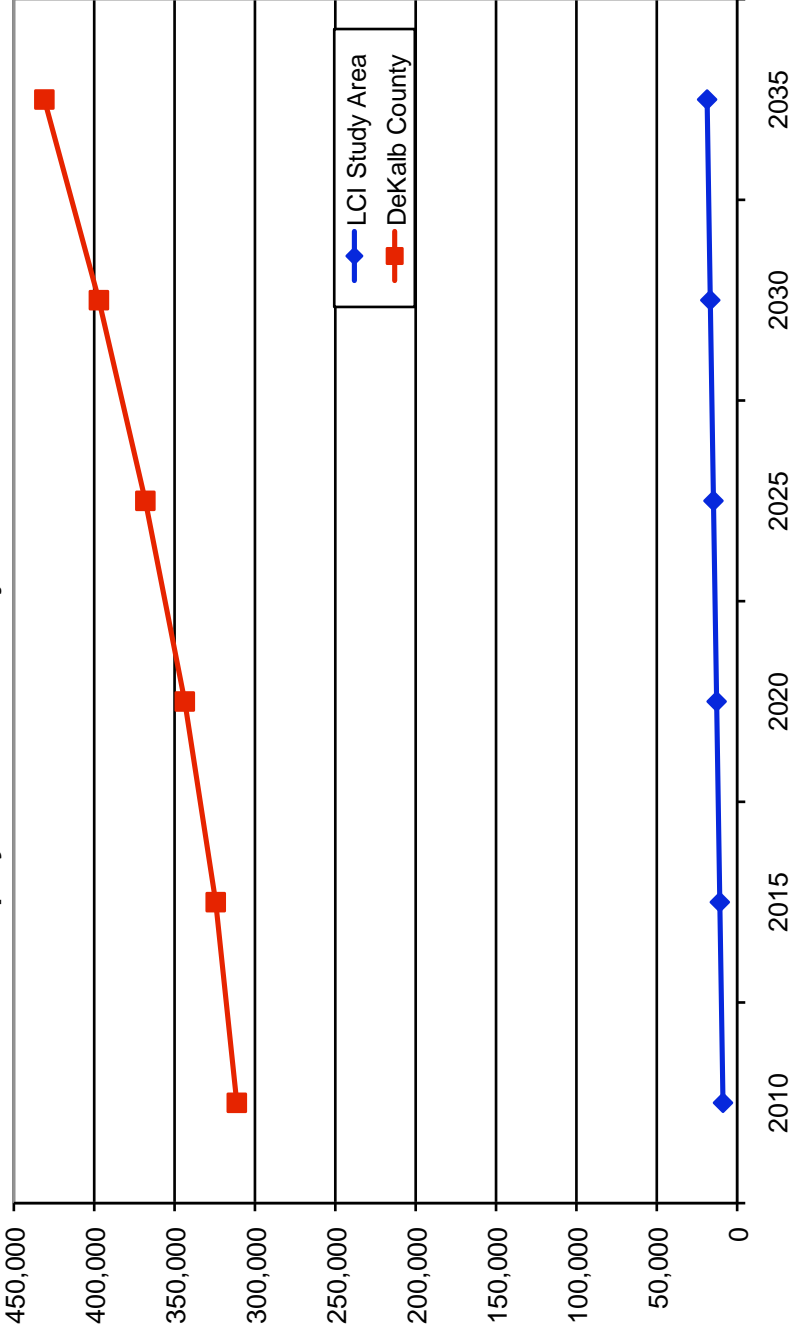


Source: Claritas

Employment Change Forecasts, LCI Study Area and DeKalb County, 2010-2035

	Total Change						Average Annual Percent Change					
	2010	2015	2020	2025	2030	2035	2010-2015	2015-2020	2020-2025	2025-2030	2030-2035	
LCI Study Area	8,810	10,786	12,762	14,737	16,713	18,689	4.5%	3.7%	3.1%	2.7%	2.4%	
DeKalb County	311,283	324,397	343,643	368,181	397,077	431,013	0.8%	1.2%	1.4%	1.6%	1.7%	

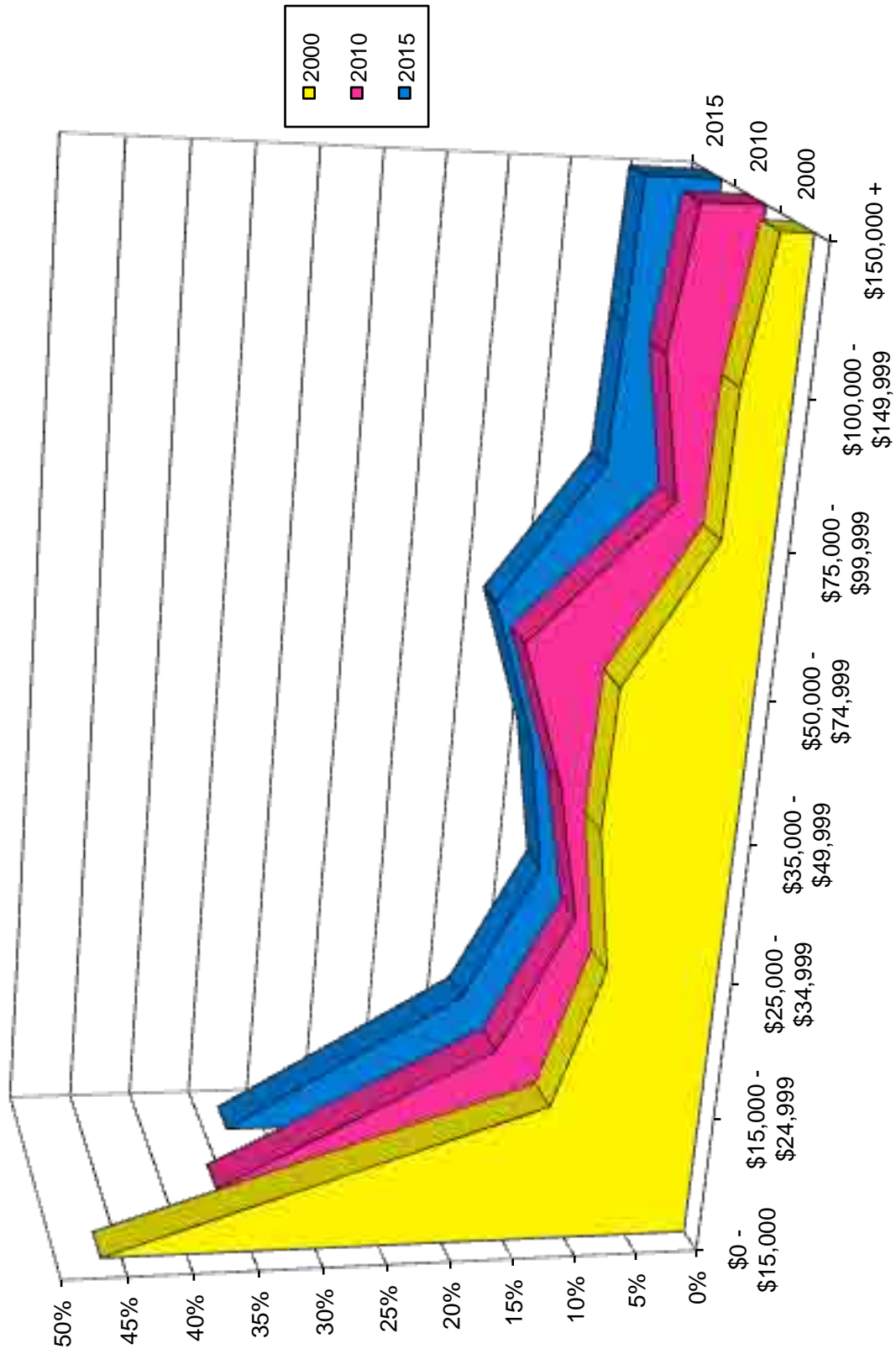
Employment Growth Projections, 2010-2035



Source: Claritas, Atlanta Regional Commission, Market + Main, Inc.

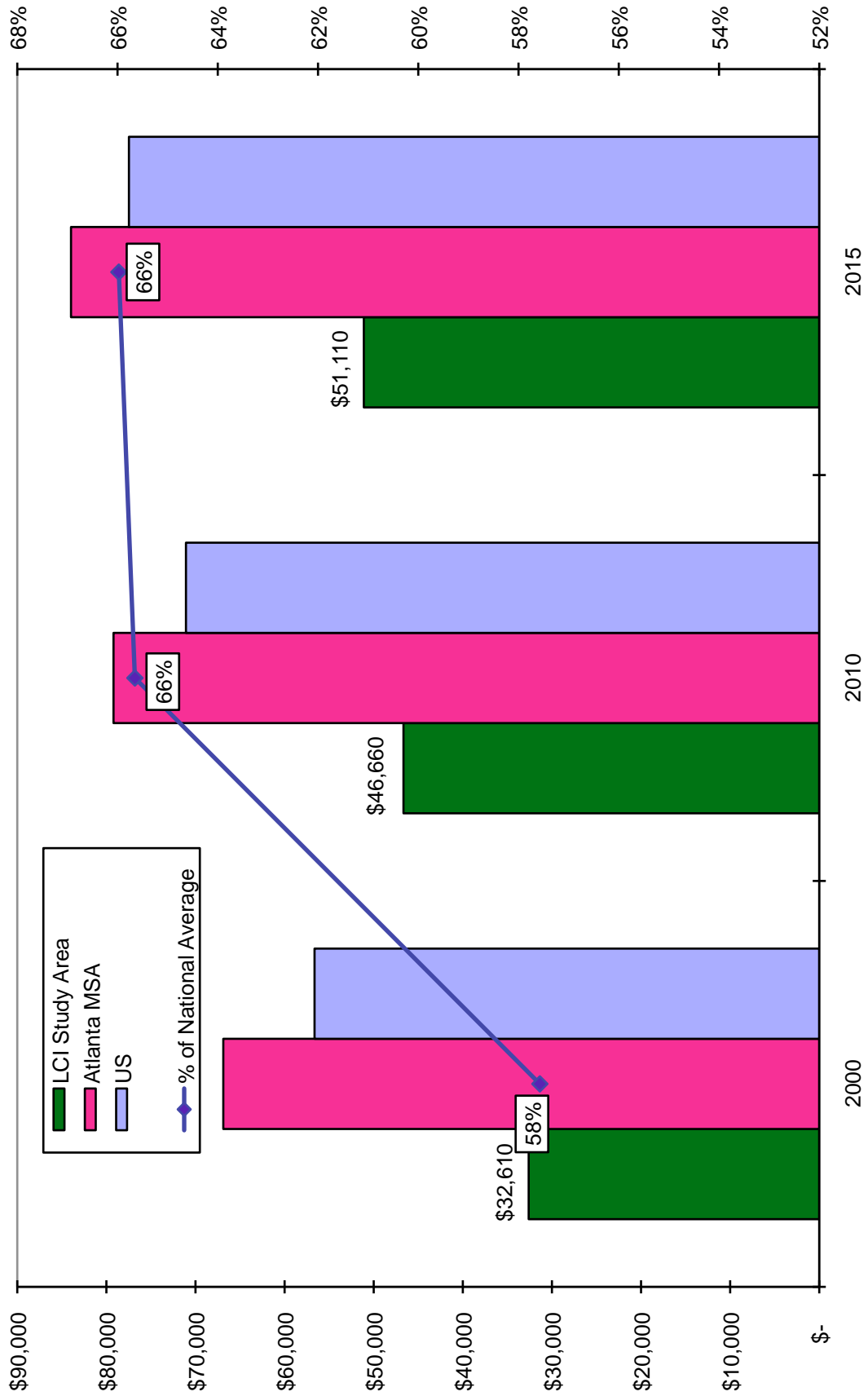
Note: Study Area projections shown here based on forecasts of market sector potential determined by Market + Main, Inc.

Household Income Trends, LCI Study Area, 2000-2015



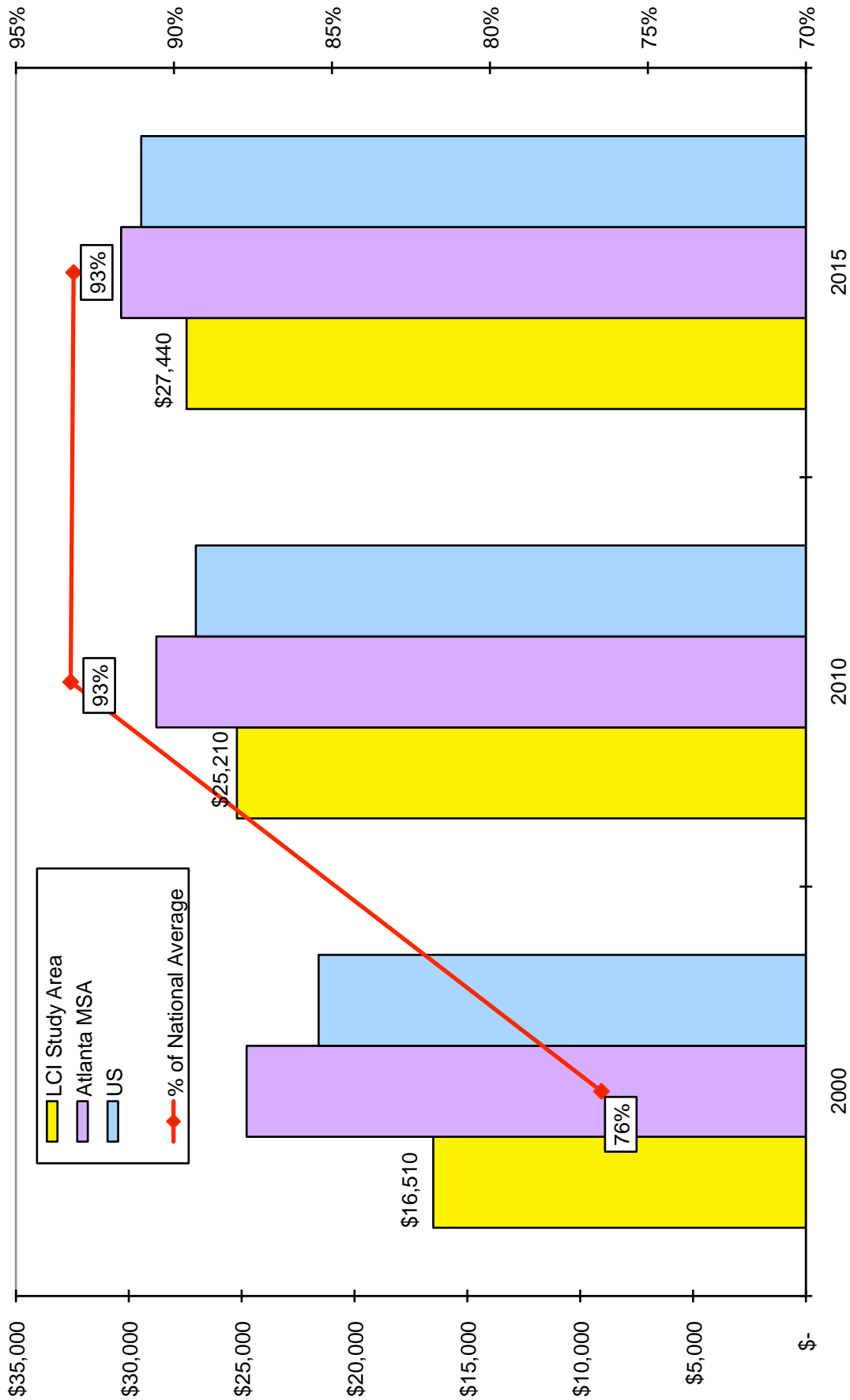
Source: US Census Bureau, Claritas

Average Household Income Trends, 2000-2015



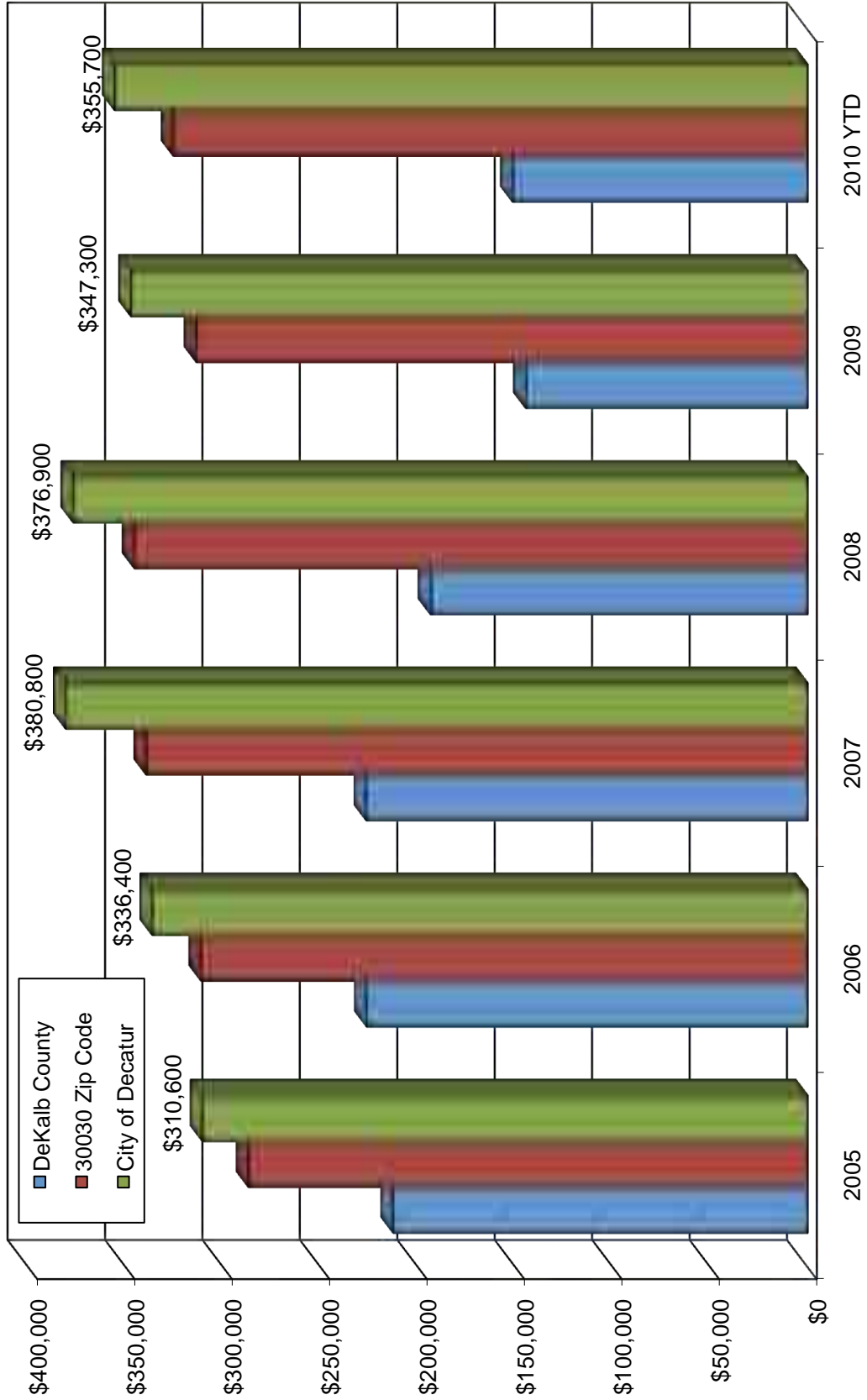
Source: US Census Bureau, Claritas, Market + Main, Inc.

Per Capita Income Trends, 2000-2015



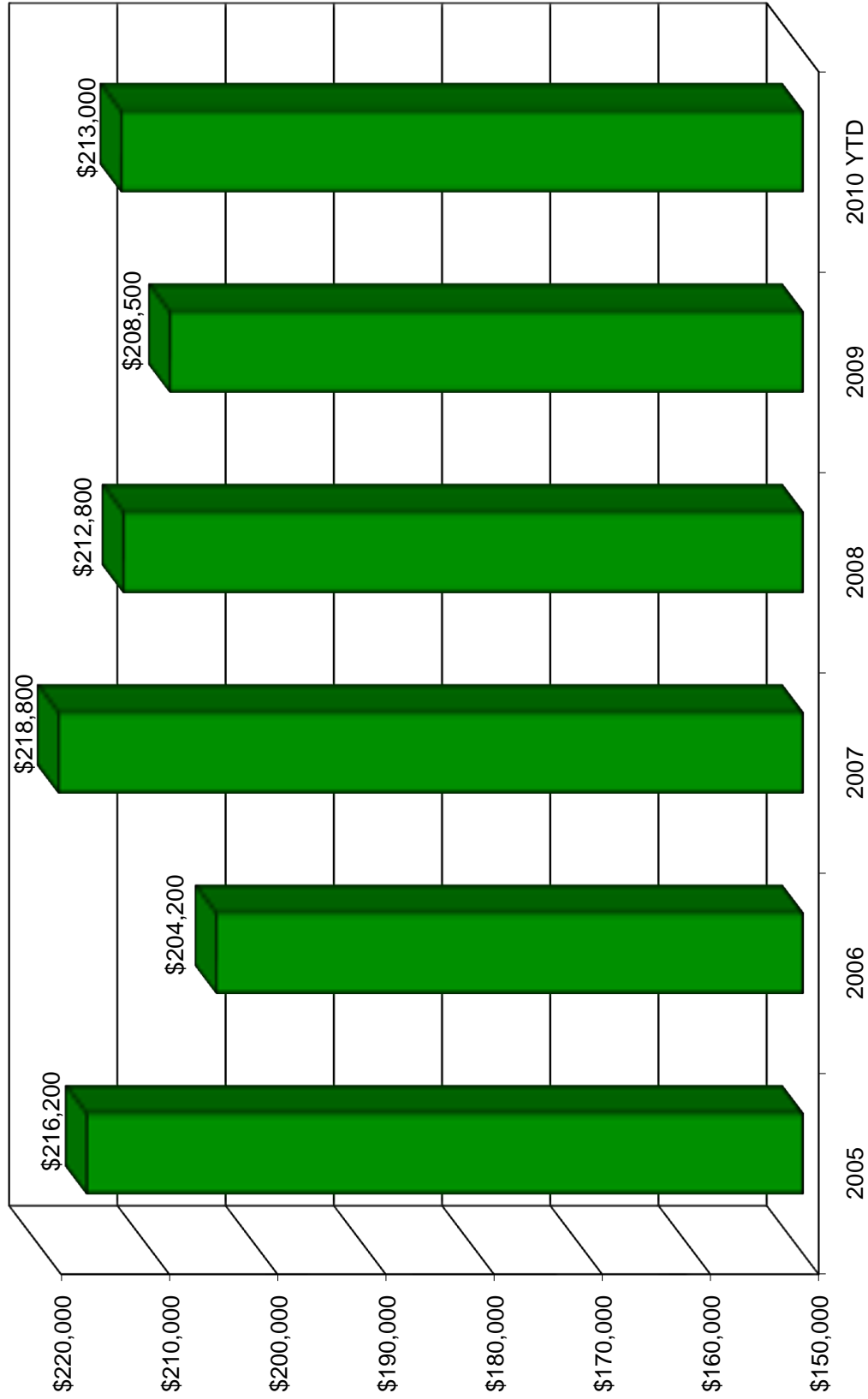
Source: US Census Bureau, Claritas, Market + Main, Inc.

Comparison of Average Single-Family Home Sales Prices, 2005-2010 YTD



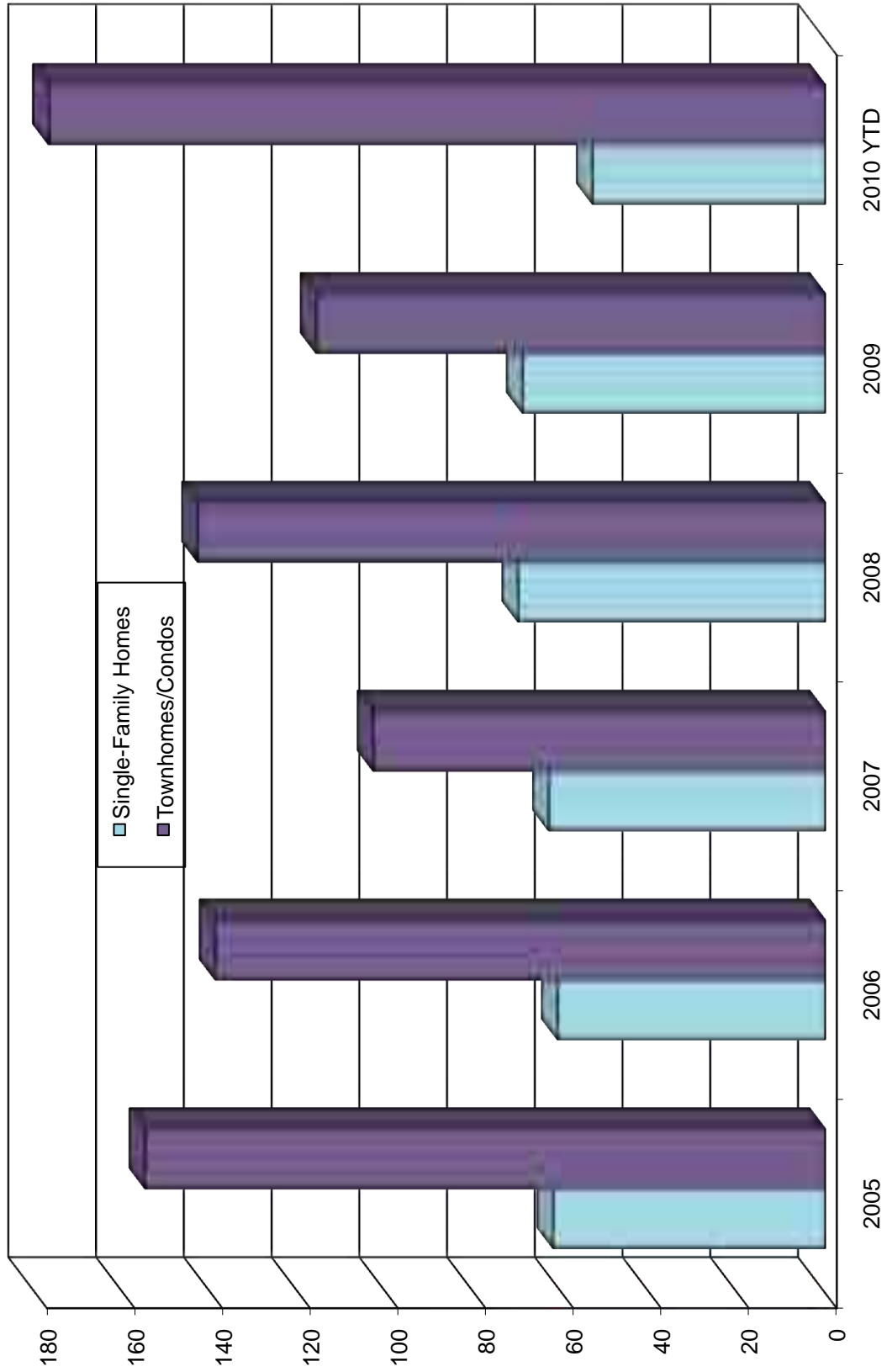
Source: Georgia Multiple Listing Service

Average Townhome/Condominium Sales Prices, City of Decatur, 2005-2010 YTD



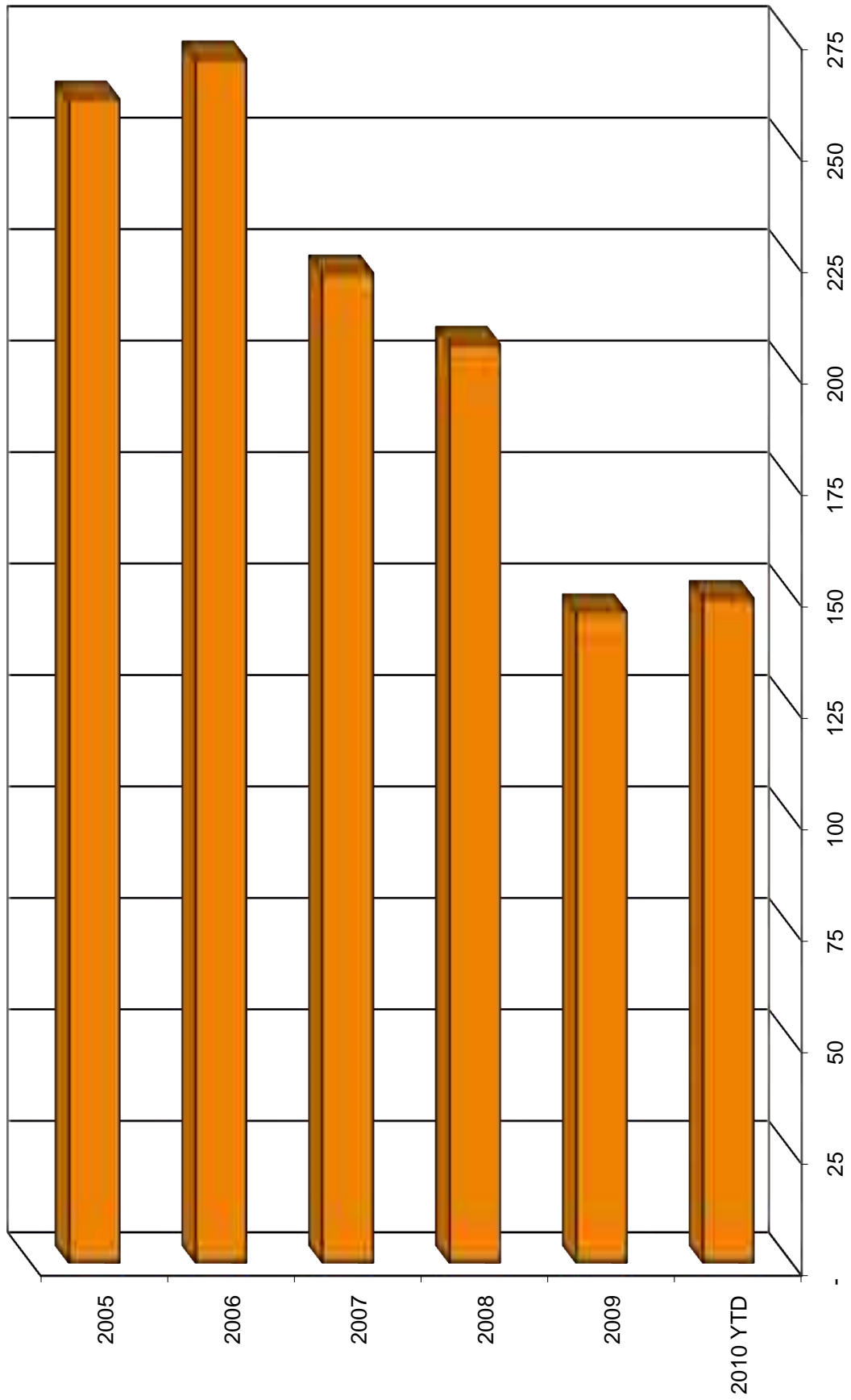
Source: Georgia Multiple Listing Service

Average Days on the Market, City of Decatur, 2005-2010 YTD



Source: Georgia Multiple Listing Service

Number of Single-Family Homes Sold, City of Decatur, 2005 - 2010 YTD



Source: Georgia Multiple Listing Service

Housing Demand Forecast by Type, Study Area, 2010-2035

Avg. Annual New Households	90
Owner HH	22.5
Renter HH	67.5

Percentage Distribution by Type	Owner HH		Renter HH	
	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	0%	0%	0%	0%
Single-Family Attached	5%	0%	0%	0%
Multi-Family (Condo/Apartments)	95%	100%	100%	100%

Total Units Annually by Type	Owner HH		Renter HH	
	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	-	-	-	-
Single-Family Attached	1	-	-	-
Multi-Family (Condo/Apartments)	21	68	23	68

Housing Units Forecasts by Type	2015		2020		2025		2030		2035	
	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	-	-	-	-	-	-	-	-	-	-
Single-Family Attached	6	-	11	-	17	-	23	-	28	-
Multi-Family (Condo/Apartments)	107	338	214	675	321	1,013	428	1,350	534	1,688
	113	338	225	675	338	1,013	450	1,350	563	1,688

Total Housing Units Forecasts	450	900	1,350	1,800	2,250
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Potential Supportable Neighborhood Serving Retail Space, Study Area, 2010

	Retail Sales Potential	Avg. HH Expenditure	Target Sales \$/SF	Total Potential Retail Space	Study Area Capture Rate	Study Area Potential Supportable Retail Space
Furniture and Home Furnishings Stores	\$338,283	\$321	\$163	2,069	60%	1,241 SF
Electronics and Appliance Stores	\$375,764	\$356	\$153	2,453	25%	613 SF
Building Material, Garden Equip Stores	\$1,483,657	\$1,406	\$143	10,354	32%	3,313 SF
Food and Beverage Stores	\$2,565,620	\$2,432	\$343	7,478	85%	6,356 SF
Health and Personal Care Stores	\$1,293,243	\$1,226	\$322	4,019	85%	3,416 SF
Clothing and Clothing Accessories Stores	\$795,862	\$754	\$168	4,726	45%	2,127 SF
Sporting Goods, Hobby, Book, Music Stores	\$306,800	\$291	\$147	2,091	33%	690 SF
General Merchandise Stores	\$2,451,496	\$2,324	\$128	19,151	75%	14,363 SF
Miscellaneous Store Retailers	\$443,966	\$421	\$166	2,675	78%	2,086 SF
Foodservice and Drinking Places	\$2,071,861	\$1,964	\$233	8,880	95%	8,436 SF
Total Retail	\$12,126,552	\$11,494		63,896		42,643 SF

Major Retail Categories:

Convenience Goods	9,772 SF
Shoppers Goods	24,434 SF
Food & Beverage	8,436 SF

Potential Supportable Community Serving Retail Space, Study Area, 2010

	Retail Sales Potential	Avg. HH Expenditure	Target Sales \$/SF	Total Potential Retail Space	Study Area Capture Rate	Study Area Potential Supportable Retail Space
Furniture and Home Furnishings Stores	\$13,884,920	\$881	\$184	75,634	25%	18,909 SF
Electronics and Appliance Stores	\$15,278,660	\$969	\$270	56,674	20%	11,335 SF
Building Material, Garden Equip Stores	\$61,986,001	\$3,932	\$315	196,875	10%	19,687 SF
Food and Beverage Stores	\$77,117,302	\$4,892	\$339	227,706	20%	45,541 SF
Health and Personal Care Stores	\$36,605,871	\$2,322	\$309	118,337	10%	11,834 SF
Clothing and Clothing Accessories Stores	\$30,500,235	\$1,935	\$222	137,457	30%	41,237 SF
Sporting Goods, Hobby, Book, Music Stores	\$13,121,793	\$832	\$207	63,507	15%	9,526 SF
General Merchandise Stores	\$81,950,953	\$5,199	\$163	502,150	20%	100,430 SF
Miscellaneous Store Retailers	\$15,885,172	\$1,008	\$242	65,706	25%	16,427 SF
Foodservice and Drinking Places	\$68,644,970	\$4,355	\$303	226,776	90%	204,098 SF
Total Retail	\$414,975,877	\$26,326		1,670,822		479,023 SF

Major Retail Categories:

Convenience Goods	57,375 SF
Shoppers Goods	217,550 SF
Food & Beverage	204,098 SF

Neighborhood Serving Retail Space Forecasts, Study Area, 2015-2035

	2015			2020			2025			2030			2035		
	Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space	
Furniture and Home Furnishings Stores	\$ 482,574	1,771		\$ 626,866	2,301		\$ 771,157	2,830		\$ 915,448	3,360		\$ 1,059,740	3,889	
Electronics and Appliance Stores	\$ 536,042	875		\$ 696,321	1,137		\$ 856,599	1,398		\$ 1,016,878	1,660		\$ 1,177,156	1,921	
Building Material, Garden Equip Stores	\$ 2,116,496	4,726		\$ 2,749,336	6,139		\$ 3,382,175	7,553		\$ 4,015,015	8,966		\$ 4,647,854	10,379	
Food and Beverage Stores	\$ 3,659,960	9,067		\$ 4,754,301	11,778		\$ 5,848,641	14,489		\$ 6,942,981	17,201		\$ 8,037,321	19,912	
Health and Personal Care Stores	\$ 1,844,863	4,873		\$ 2,396,483	6,330		\$ 2,948,104	7,787		\$ 3,499,724	9,244		\$ 4,051,344	10,701	
Clothing and Clothing Accessories Stores	\$ 1,135,329	3,034		\$ 1,474,796	3,941		\$ 1,814,264	4,848		\$ 2,153,731	5,756		\$ 2,493,198	6,663	
Sporting Goods, Hobby, Book, Music Stores	\$ 437,663	985		\$ 568,525	1,279		\$ 699,388	1,573		\$ 830,250	1,868		\$ 961,113	2,162	
General Merchandise Stores	\$ 3,497,158	20,490		\$ 4,542,820	26,616		\$ 5,588,481	32,742		\$ 6,634,143	38,869		\$ 7,679,805	44,995	
Miscellaneous Store Retailers	\$ 633,335	2,976		\$ 822,705	3,866		\$ 1,012,074	4,756		\$ 1,201,444	5,646		\$ 1,390,813	6,536	
Foodservice and Drinking Places	\$ 2,955,593	12,035		\$ 3,839,325	15,633		\$ 4,723,058	19,232		\$ 5,606,790	22,830		\$ 6,490,522	26,428	
Total Retail	\$17,299,015	60,831		\$22,471,478	79,020		\$27,643,941	97,209		\$32,816,404	115,398		\$37,988,867	133,587	
Major Retail Categories:															
Convenience Goods		13,940			18,108			22,276			26,444			30,613	
Shoppers Goods		34,857			45,279			55,701			66,123			76,546	
Food & Beverage		12,035			15,633			19,232			22,830			26,428	

Community Serving Retail Space Forecasts, Study Area, 2015-2035

	2015			2020			2025			2030			2035		
	Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space		Retail Sales Potential	Study Area Potential Supportable Retail Space	
Furniture and Home Furnishings Stores	\$ 14,298,041	19,471		\$ 14,694,426	20,011		\$ 15,090,811	20,551		\$ 15,487,196	21,091		\$ 15,883,580	21,630	
Electronics and Appliance Stores	\$ 15,733,249	11,672		\$ 16,169,422	11,996		\$ 16,605,596	12,319		\$ 17,041,769	12,643		\$ 17,477,942	12,966	
Building Material, Garden Equip Stores	\$ 63,830,284	20,273		\$ 65,599,852	20,835		\$ 67,369,420	21,397		\$ 69,138,988	21,959		\$ 70,908,556	22,521	
Food and Beverage Stores	\$ 79,411,790	46,896		\$ 81,613,324	48,196		\$ 83,814,859	49,496		\$ 86,016,393	50,797		\$ 88,217,927	52,097	
Health and Personal Care Stores	\$ 37,695,014	12,186		\$ 38,740,033	12,524		\$ 39,785,052	12,861		\$ 40,830,072	13,199		\$ 41,875,091	13,537	
Clothing and Clothing Accessories Stores	\$ 31,407,715	42,464		\$ 32,278,432	43,641		\$ 33,149,148	44,818		\$ 34,019,865	45,996		\$ 34,890,582	47,173	
Sporting Goods, Hobby, Book, Music Stores	\$ 13,512,209	9,809		\$ 13,886,808	10,081		\$ 14,261,407	10,353		\$ 14,636,006	10,625		\$ 15,010,605	10,897	
General Merchandise Stores	\$ 84,389,258	103,418		\$ 86,728,782	106,285		\$ 89,068,307	109,152		\$ 91,407,832	112,019		\$ 93,747,357	114,886	
Miscellaneous Store Retailers	\$ 16,357,807	16,915		\$ 16,811,295	17,384		\$ 17,264,783	17,853		\$ 17,718,270	18,322		\$ 18,171,758	18,791	
Foodservice and Drinking Places	\$ 70,687,379	210,171		\$ 72,647,046	215,997		\$ 74,606,714	221,824		\$ 76,566,381	227,650		\$ 78,526,048	233,477	
Total Retail	\$427,322,745	493,276		\$439,169,421	506,951		\$451,016,096	520,626		\$462,862,772	534,301		\$474,709,447	547,976	
Major Retail Categories:															
Convenience Goods		59,082			60,720			62,358			63,996			65,634	
Shoppers Goods		224,023			230,234			236,444			242,655			248,866	
Food & Beverage		210,171			215,997			221,824			227,650			233,477	

Total Retail Space Forecasts, Study Area, 2010-2035

	2010	2015	2020	2025	2030	2035
Furniture and Home Furnishings Stores	20,150	21,242	22,311	23,381	24,450	25,520
Electronics and Appliance Stores	11,948	12,547	13,132	13,717	14,303	14,888
Building Material, Garden Equip Stores	23,001	25,000	26,975	28,950	30,925	32,900
Food and Beverage Stores	51,897	55,963	59,975	63,986	67,997	72,008
Health and Personal Care Stores	15,250	17,059	18,854	20,648	22,443	24,238
Clothing and Clothing Accessories Stores	43,364	45,498	47,582	49,667	51,751	53,836
Sporting Goods, Hobby, Book, Music Stores	10,216	10,794	11,360	11,927	12,493	13,059
General Merchandise Stores	114,793	123,908	132,901	141,895	150,888	159,882
Miscellaneous Store Retailers	18,513	19,892	21,250	22,609	23,968	25,327
Foodservice and Drinking Places	212,534	222,205	231,630	241,055	250,480	259,905
Total Retail SF	521,666	554,107	585,971	617,835	649,699	681,563

Major Retail Categories:						
Convenience Goods	67,147	73,022	78,828	84,634	90,440	96,246
Shoppers Goods	241,985	258,880	275,513	292,146	308,778	325,411
Food & Beverage	212,534	222,205	231,630	241,055	250,480	259,905

Office Space Demand Forecast, Study Area, 2010-2035

	2010	2011	2012	2013	2014	2015	2020	2025	2030	2035
Employment	8,810	9,205	9,600	9,995	10,391	10,786	12,762	14,737	16,713	18,689
Office Employment-Est.	5,727	5,983	6,240	6,497	6,754	7,011	8,295	9,579	10,864	12,148
Total Demand-Potential Office SF	1,660,685	1,735,172	1,809,658	1,884,145	1,958,631	2,033,118	2,405,551	2,777,984	3,150,417	3,522,849
Demand Increments	0	74,487	148,973	223,460	297,946	372,433	744,866	1,117,299	1,489,732	1,862,164
Study Area Capture-Total SF	1,660,685	1,735,172	1,809,658	1,884,145	1,958,631	2,033,118	2,405,551	2,777,984	3,150,417	3,522,849

Summary of Selected Retail Centers, Study Area
Third Quarter 2010

Address	Year Built	% Leased	Gross Leasable Area
129 Church St		100	3,190
340 Church St		100	3,593
406-416 Church St	1930	100	6,600
418 Church St	1905	100	2,800
427 Church St		100	2,348
609-613 Church St	1940	25	4,000
614 Church St	1967	21.88	3,200
701 Church St	1951	100	10,200
704-708 Church St	1945	100	7,589
708 Church St	1945	100	3,531
803 Church St	1974	100	6,500
811 Church St	1971	100	1,050
113-115 Clairemont Ave	1943	0	5,147
215 Clairemont Ave		100	3,408
307 Clairemont Ave	1966	100	4,760
117 Clairmont Ave	1943	100	7,500
333 Commerce Dr		100	1,835
720 Commerce Dr	1968	100	16,599
760 Commerce Dr		100	1,013
777 Commerce Dr		100	25,019
830 Commerce Dr	1984	100	2,833
113-123 E Court Sq	1927	100	11,500
127 E Court Sq		100	2,914
222 E Howard Ave	1952	100	2,500

Summary of Selected Retail Centers, Study Area
Third Quarter 2010

Address	Year Built	% Leased	Gross Leasable Area
303 E Howard Ave	1980	100	3,964
310 E Howard Ave	1950	100	315
314 E Howard Ave	1918	100	1,962
402 E Howard Ave	1950	100	5,400
506 E Howard Ave	1955	100	5,000
225 N McDonough St		100	1,988
405 N McDonough St		100	5,700
515 N McDonough St	1905	100	38,961
545 N McDonough St	1922	100	13,540
345 Ponce De Leon Ave		100	1,302
101 Ponce De Leon Pl		54.55	6,600
235 Ponce De Leon Pl		100	5,842
245 Ponce De Leon Pl	1999	100	4,143
265 Ponce De Leon Pl		100	3,962
112-114 E Ponce De Leon Ave	1933	100	7,050
119-129 E Ponce De Leon Ave		100	1,572
131 E Ponce De Leon Ave	1938	100	1,620
205 E Ponce De Leon Ave	1956	100	3,961
216-232 E Ponce De Leon Ave		100	7,000
225 E Ponce De Leon Ave	2000	91.45	12,862
249 E Ponce De Leon Ave	1968	100	1,654
180-186 W Ponce De Leon Ave	2003	100	13,500
225-265 W Ponce De Leon Ave	1999	100	28,250
240 W Ponce De Leon Ave	1950	100	6,792
250-254 W Ponce De Leon Ave		91.87	24,586

Summary of Selected Retail Centers, Study Area
Third Quarter 2010

Address	Year Built	% Leased	Gross Leasable Area
308 W Ponce De Leon Ave	1986	100	18,000
340 W Ponce De Leon Ave	1971	85.99	7,907
358 W Ponce De Leon Ave	1947	100	3,337
359 W Ponce De Leon Ave		100	2,020
368 W Ponce De Leon Ave	1946	100	8,034
402 W Ponce de Leon Ave	1940	100	1,334
407 W Ponce De Leon Ave	1965	100	1,370
410 W Ponce De Leon Ave	1963	100	7,000
419 W Ponce De Leon Ave	1954	100	2,145
422 W Ponce De Leon Ave	1960	100	2,000
431 W Ponce De Leon Ave	1958	100	40,000
104 Sycamore Pl	1957	72.31	5,525
120 Sycamore Pl	1930	100	3,052
111 Sycamore St		100	883
115 Sycamore St	1947	100	3,000
123 Sycamore St		100	963
139 Sycamore St	1940	100	2,400
141-145 Sycamore St		100	3,038
149-155 Sycamore St	1940	100	6,753
105 E Trinity Pl	1988	100	3,086
211 E Trinity Pl	1957	100	4,769
240 E Trinity Pl	1965	100	1,213
253 E Trinity Pl	1967	100	1,942

Source: CoStar

Summary of Selected Office Buildings, Study Area
Third Quarter 2010

Address	Building Class	Year Built	% Leased	Total Space
120 N Candler St	C	1965	100	5,899
450 N Candler St	C	1973	100	58,423
102 Church St	C	1958	100	2,700
104 Church St	C	1935	100	4,016
111 Church St	C	1945	100	1,973
112 Church St	C	1914	100	2,384
115 Church St	C	1950	100	8,500
121 Church St	C	1940	100	3,200
124 Church St	C	1915	100	2,361
208 Church St	C	1956	100	4,640
212 Church St	C	1911	100	4,200
215 Church St	C	1930	100	9,000
216 Church St	C	1977	100	3,500
220 Church St	C	1950	100	1,928
314 Church St	C	1937	84.98	12,000
320-330 Church St	B	1940	100	38,800
523-529 Church St	B	1963	100	24,781
542 Church St	B	1961	100	15,068
547 Church St	B	1964	100	18,000
603 Church St	C	1952	100	2,800
613 Church St	C	1982	100	3,440
711 Church St	C	1972	100	4,319
720 Church St	C		100	3,600

Summary of Selected Office Buildings, Study Area
Third Quarter 2010

Address	Building Class	Year Built	% Leased	Total Space
125 Clairemont Ave	A	1989	67.15	103,048
160 Clairemont Ave	A	1983	83.51	121,686
111 Clairmont Ave	B		100	800
163 Clairmont Ave	B	1979	100	10,000
750 Commerce Dr	B	1983	67.93	43,565
755 Commerce Dr	B	1966	79.11	90,422
1000 Commerce Dr	C	1958	100	2,064
1120 Commerce Dr	C	1973	100	4,457
1300 Commerce Dr	B	1980	100	93,479
715 E Commerce Dr	C		100	3,478
133 E Court Sq	C	1960	100	8,000
1 W Court Sq	B	1971	87.07	150,762
116 E Howard Ave	C	1966	100	4,020
306 E Howard Ave	C		100	9,600
308 E Howard Ave	C	1925	100	3,538
416 E Howard Ave	C		100	1,800
103 N McDonough St	C	1930	100	1,900
107 N McDonough St	C	1920	100	1,678
111 N McDonough St	C	1931	100	2,300
115 N McDonough St	C	1932	100	1,312
117 N McDonough St	B	1890	100	1,500
119 N McDonough St	C	1880	100	6,000
215 N McDonough St	C	1957	100	3,000
217 N McDonough St	C	1978	100	1,741
509 N McDonough St	B		100	2,850
535 N McDonough St	C	1960	100	2,000
189 Northern Ave	C	1992	100	2,250

Summary of Selected Office Buildings, Study Area
Third Quarter 2010

Address	Building Class	Year Built	% Leased	Total Space
402 Ponce De Leon Ave	C		100	1,019
106 E Ponce De Leon Ave	B		100	20,842
150 E Ponce De Leon Ave	A	1984	96.98	82,533
200 E Ponce De Leon Ave	B	1976	100	42,921
235 E Ponce De Leon Ave	C	1964	100	14,572
250 E Ponce De Leon Ave	B	1962	65.71	124,272
101 W Ponce De Leon Ave	A	1992	100	112,440
315 W Ponce De Leon Ave	B	1964	81.52	132,000
330 W Ponce De Leon Ave	A	1988	100	92,152
380 W Ponce De Leon Ave	C	1930	100	1,029
403 W Ponce De Leon Ave	C	1949	100	12,880
411 W Ponce De Leon Ave	C	1940	100	2,330
201 Swanton Way	C	1985	100	4,888
205 Swanton Way	B	1981	22.45	4,900
209 Swanton Way	C	1986	100	6,600
325 Swanton Way	B	1986	100	19,342
131 Sycamore St	C	1935	100	1,710
246 Sycamore St	B	1974	81.08	25,730
309 Sycamore St	C	1830	100	4,500
315 Sycamore St	C	1920	100	3,453
110-120 E Trinity Pl	B	1950	76.46	19,405
125 E Trinity Pl	B	1964	67.89	18,000
141 E Trinity Pl	C	1935	100	5,000
229 E Trinity Pl	C		100	10,940
511 W Trinity Pl	C	1962	0	3,000
122 Williams St	C	1930	100	1,928

Source: CoStar

Summary of Selected Industrial Buildings, Study Area
Third Quarter 2010

Address	Year Built	% Leased	Total Space
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No industrial space in Study Area currently.