Union City Town Center Study

Livable Centers Initiative

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INTRODUCTION

The **Union City Town Center Study** represents Union City's vision for creating a downtown area for a city that has never really had one. In place of a disconnected collection of auto-oriented uses, the Study envisions a collection of mixed-use neighborhoods featuring a range of housing, retail, employment and open space options. Tying these together are a series of new streets, greenways, and pedestrian and transit facilities.

The Study is divided into four sections:

Section 1: Inventory and Analysis

This section provides an overview of the Livable Centers Initiative (LCI) program and a summary of existing conditions within the Study Area. Study Area components are divided into functional categories for the purpose of organization. Within each category an Overview is provided with background information and theories, Existing Conditions are described, and Strengths, Weaknesses, Opportunities and Threats are summarized.

Section 2: Visioning

This section includes the community's vision, as expressed in the Concept Plan, for the Town Center and reviews the public involvement and visioning process that achieved it. It also includes a review of the impacts of the Concept Plan on existing and proposed infrastructure systems.

Section 3: Implementation

This section is a concise summary of the policies, programs and projects that the City of Union City must undertake to achieve the vision represented by the Concept Plan. It includes urban design guidelines, zoning and land use policies, public projects, and funding strategies.

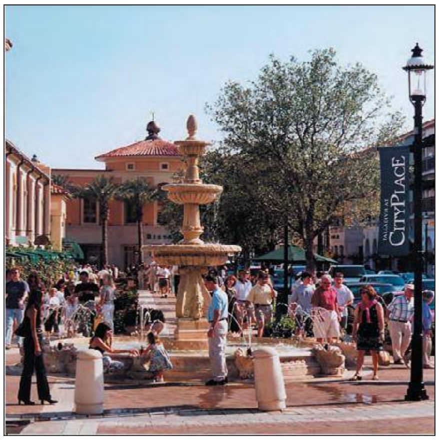
Section 4: Appendix

The appendix includes documentation of the public involvement process, as well as detailed data analysis performed during the planning process.

Section 1:
Inventory and Analysis

1.1 OVERVIEW

This section provides an overview of the Livable Centers Initiative (LCI) program and provides a summary of existing conditions within the Study Area. Study Area components are divided into functional categories for the purpose of organization. Within each category an Overview is provided with background information and theories, Existing Conditions are described, and Strengths, Weaknesses, Opportunities and Threats are summarized.



The LCI program encourages the creation of walkable, mixed use cen-ers, such as this one in West Palm Beach, Florida

Purpose of the Study

The LCI program is intended to promote greater livability, mobility and development alternatives in existing employment and town centers. The rationale is that directing development towards areas with existing infrastructure will benefit the region and minimize sprawling land use patterns. Minimizing sprawl, in turn, will potentially reduce the amount of vehicle miles traveled and the air pollution associated with those miles. Lastly, the LCI program uses the successful 1996 Olympics model to promote the concept that investment in public infrastructure will spur private investment. Thus, the LCI program is a vehicle whereby the Atlanta Regional Commission (ARC) can attempt to direct mixed-use and mixed income development towards existing infrastructure by providing study and implementation dollars.

An LCI plan should include a variety of housing types, such as these townhomes in Virginia

In this context, the City of Union City saw in 2003 an opportunity to study the area surrounding the former Shannon Mall. Opened in 1980, the mall site was ripe for redevelopment and had existing infrastructure to support development of vacant lands and redevelopment/reuse of existing facilities. With its close proximity to downtown Atlanta, Hartsfield-Jackson Atlanta International Airport and the growing residential areas of south Fulton County, the site is now home to Metro Atlanta Studios, a complex of more than 200,000 square feet of sound stages and production facilities.

The goals of the Union City Town Center Study, as established by the requirements of the LCI program, are to:

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

Transit and pedestrian access are important to LCI studies

Map showing the location of Union City in the Atlanta region

The Town Center area is convenient to Hartsfield International Airport

Union City is a short drive from Downtown Atlanta

4. Through transportation investments increase the desirability of redevelopment of land served by existing infrastructure at activity and town centers.
5. Preserve the historical 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 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.

Regional Context

The Union City Town Center Study Area is located in south Fulton County, Georgia, approximately 18 miles southwest of downtown Atlanta. It is southwest of Hartsfield Atlanta International Airport, and affords easy access to both Downtown and the airport via I-85.

Study Area Boundaries

The Study Area includes two non-contiguous areas. The core is the area surrounding the former Shannon Mall site defined by Flat Shoals Road on the north, Oakley Road on the east, Jonesboro Road/Old Jonesboro Road on the south, and Watson Street on the west. Within this area are two principal residential nodes that are divided by the north/south-running Shannon Parkway. Shannon Parkway effectively separates Metro Atlanta Studios, apartments, townhouses, and condominiums on the east from the single family residential communities, a post office and city services on the west. The Study Area also includes the Georgia Department of Transportation (GDOT) owned South Fulton Park and Ride Lot located at exit 66 of I-85, along South Royal Parkway.

STUDY AREA

The arrangement of streets define towns and cities the world over

1.2 STREET PATTERNS

Overview

Streets and blocks are the most important defining characteristics of a community. While buildings and land uses often change, the platting pattern of a community usually remains unchanged over the centuries. Blocks and streets can be thought of as the “bones” of a community. As bones determine our height, stature and looks, the arrangement of different block and street patterns directly affect the types of communities that they can support and the importance of key building sites.

There are two principal types of blocks and street patterns:

A dendritic system

Dendritic, or tree-like, street systems are made up of many small and disconnected local streets that feed into fewer collectors that, in turn, feed into even fewer arterials. Because this pattern contains many dead-end local streets it forces all traffic onto collectors and arterials and results in large block sizes and increased trip distances.

The *dendritic* pattern tends to discourage walking, encourage traffic congestion on collectors and arterials, and create a transportation system that is prone to shutdown when accidents or other incidents disrupt traffic collectors or arterials. Its creation of longer trips also supports conventional suburban-style land uses marked by their automobile orientation, separation of use, and disregard for the quality of the streetscape. These great distances also have a direct impact on the ability of emergency vehicles to respond to situations in an efficient manner.

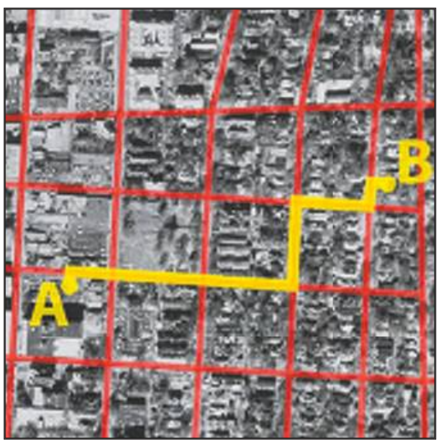
An interconnected system

Interconnected street systems are made up of a series of small and medium sized streets arranged in a grid or modified grid pattern. In this pattern, virtually all streets connect to other streets. This provides small blocks, ensures many possible routes of travel and eliminates the need for wide and high traffic arterials and collectors.

The interconnected street pattern encourages walking, bicycling and other forms of non-motorized transportation because it increases the likelihood of being able to make a trip without being forced onto a high-speed, high-volume arterial or collector. It also tends to support pedestrian-oriented land uses by allow land uses to be closer together, thus increasing the opportunities for shared parking and pedestrian-oriented streetscapes.

“Smart growth” principles generally support an interconnected system over a *dendritic* one because it balances pedestrian and vehicular needs better. Both cars and pedestrians operate more efficiently

In a dendritic system, the distance from A to B is one mile and achievable along one route



In an interconnected system the distance from A to B is one half mile, with multiple route options

The vacant theater on Mall Boulevard is a key terminus point

when many routes of travel, shorter distances, and more direct trips are available. Generally, this means block sizes of not more than 800 feet in length, but preferably between 200 and 600 feet. In developed areas with an existing *dendritic* system achieving this can be a challenge because interconnected systems work best over a large area. In most places the reality is that arterials and collectors serve transportation needs that extend beyond the immediate area. Even so, a localized interconnected system can reduce congestion on these streets by dispersing local trips.

The arrangement of streets can also be used to define key public spaces and building sites. In traditional community design, important buildings were often located at the end of a street vista (see image on preceding page). Similarly, parks and open spaces were always defined by streets to ensure maximum public access.

Existing Conditions

The street pattern in the Study Area varies, depending on the time at which an area was developed. In the northwestern and southwestern portion of the Study Area, the older neighborhoods closest to the historic downtown, the streets are interconnected and grided. The remainder of the Study Area is marked by a *dendritic* system. With the exception of Shannon Parkway and Oakley Road, there are no north-south streets. Similarly, Flat Shoals Road and Jonesboro Road/ Ozone Avenue are the only east-west streets. Small connections do exist in the form of private drives through some developments.

Terminus points exist, which could become significant building sites. The most notable is the vacant cinema at the intersection of Mall Boulevard and Londonderry Way.

Please see Section 1.6 for the traffic impacts of this pattern.

<u>Strengths</u>

- Interconnected system exists in historic neighborhoods.

<u>Weaknesses</u>

- *Dendritic* system exists in much of the Study Area.
- Few north-south or east-west connections exist.

<u>Opportunities</u>

- Alteration of the Study Area's street patterns.
- Terminus points could be created.

<u>Threats</u>

- City codes could fail to require connectivity.
- Resistance to connectivity could thwart new streets.

The Ebenezer Baptist Church in Atlanta dignifies the public realm

These historic commercial structures in Charleston create a pleasant streetscape

A wide porch on this Pittsburgh home enhances the street

1.3 ARCHITECTURE & BUILDING PLACEMENT

Overview

Until the early twentieth century architecture defined and dignified the public realm. Buildings were placed to order and enrich the street. Most intown buildings came up to the sidewalk and fronted it with entrances. Commercial buildings typically incorporated awnings, storefronts, wide sidewalks, and space for goods or outdoor dining. Residential buildings had stoops, porches, balconies, or a small green space between the building, or the sidewalk bordered by a low garden fence. This created buildings that were oriented towards the street and with a clear division between public and private space.

With time, greater setbacks developed for commercial and residential buildings. In the streetcar suburbs of the early 1900's, houses were usually set 10 feet from the sidewalk in the center of town and 30 feet on the edge. As with older villages, cities and towns, most early suburbs were within a five-minute walk of a small commercial center or a transit stop. Many of the suburbs could not support commercial unless the housing density was a minimum of 6-7 units per acre.

Style variations notwithstanding, buildings and their street orientation remained stable from 1900 until World War II. This all changed after WW II, when the car became the primary mode of transportation. With this, commercial and residential environments transformed from being pedestrian-oriented to vehicle-oriented. Highway standards and codes sympathetic to the motorist were enacted, and architecture and building placement became focused on responding to the car. The speed at which people experienced their communities increased and buildings were placed farther from the street to accommodate parking. As a result, building detailing became less important than recognition; architecture became secondary to branding. A few shrubs, trees and owers, and large signs were more important than relationship to the street or respect for the public realm.

Today, American architecture is defined by being easily recognizable. Chain retailers look the same everywhere, and homes are sold based on "curb appeal". The exteriors of buildings are now insignificant. As a result, much of America's newer areas are visually monotonous.

Existing Conditions

Architecture in the Study Area is generally non-descript. Commercial buildings are single use, one story tall prototypes lacking any detailing or re ection of the area's history. These horizontal scale fails to provide for mixed-uses and results in every building being an object unto itself, with no compatibility with adjacent uses.

This Jiffy Lube is a national prototype that has no relation to local context

The commercial buildings are designed to accommodate the automobile, and not the pedestrian. None of the buildings define the public realm in a dignified manner. The area's major streets are defined not by architecture, but by vast parking lots, signage, and minimum landscaping found in front of each single use building.

The largest architectural element in the Study Area, Shannon Mall, includes many features typical of mall architecture from the 1980's. A linear interior pedestrian "street" is anked by contiguous storefronts, but there are no windows on the exterior of the structure; acres of parking surround the mall; and larger, identifiable anchor stores area found at the ends. The building itself is non-descript, which puts it at a competitive disadvantage against other shopping centers.

These townhomes have some of the Study Area's best architecture

Housing in the Study Area is low-to-mid-priced single-family homes, apartments, and townhomes. A number of new subdivisions have been constructed recently according in the conventional design. Many of these place large garages towards the street and fail to re ect the historic character of Union City. Older housing is in fair condition and provides a unique architectural history. Multifamily developments are stand-alone and with no relationship to nearby neighborhoods. Most are architecturally monotonous and lack the variety necessary for visual interest.

Architecture could be used to develop a sense of place. Zoning could create architecture that defines the area in a positive way. New buildings could be oriented to redefine the public realm and create a walker- friendly neighborhood. More importantly, architecture could develop a unique market identify for the Town Center Area.

<u>Strengths</u>

- Local historic precedents.

<u>Weaknesses</u>

- Non-descript architecture.
- Buildings that poorly relate to the public realm.

<u>Opportunities</u>

- Improve Shannon Mall's exterior aesthetics.
- Architectural standards or code requirements.
- New sense of identity through architecture.
- Create new architectural standards.

<u>Threats</u>

- Inflexible commercial prototypes.
- Continued lack of identity could harm area's viability.

This homes most pronounced feature is the garage

Pedestrians use the sidewalk to walk to a restaurant in Atlanta

1.4 PEDESTRIAN SYSTEMS

Overview

Because every trip begins as a pedestrian trip, the walking experience within the Study Area is critical to understanding the current transportation system.

Existing Conditions

The Study Area's pedestrian system has both good and bad attributes. General land use patterns are auto-oriented, although new sidewalks improvements are creating better conditions.

<u>Strengths</u>

- Compact size of historic downtown supports walkability.
- Town center area is surrounded by multi-family uses.
- Green corridors still available adjacent to floodplain.

<u>Weaknesses</u>

- SR 138/Jonesboro Road is hostile to pedestrians.
- Many roads do not have continuous sidewalks, width of roads hamper pedestrian activity.
- Low current levels of pedestrian activity
- The existing GDOT park & ride lot is not readily accessible for pedestrians from either the offices to its north or to the Shannon Mall and residential areas to its south
- Lack of public gathering spaces

Sidewalks on Shannon Parkway provide a much needed pedestrian connection to the commercial core

<u>Opportunities</u>

- Existing open green space and parks can be linked together into creating a greenway
- Enhance walking environment along Shannon Parkway to make walking a legitimate alternative transportation mode.
- Opportunity to provide connection between historic downtown (Main Street) and new town center (Atlanta Metro Studios area).
- Seize upon opportunity to build/rebuild streets with a more pedestrian character.
- Tame SR 138 to make it less of a pedestrian barrier.

There are no sidewalks along parts of Mall Boulevard

<u>Threats</u>

- Significant costs incurred in reconstructing and pedestrianizing existing roads.
- Jurisdictional coordination with any proposed modification to SR 138 (GDOT).
- Long walking distance between historic downtown and new town center

1.5 BICYCLE SYSTEMS

Bike lanes can make cycling safer on commercial streets

Overview

Bicycles are an increasingly important means of transportation, particularly for low-to-middle income people. Any well-balanced transportation system must include bicycle facilities to ensure a range of mobility options.

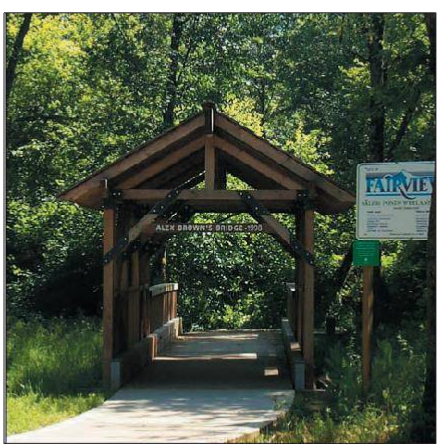
Existing Conditions

Bicycle systems in the study area are virtually nonexistent. However, the excess width of many streets and the proximity of uses makes the Town Center area a prime candidate for improved facilities.

This bicycle is chained to a sign because there are no bicycle racks

Strengths
- Compact size of Union City and proximity of historic downtown to Atlanta Metro Studios area makes bicycling an attractive travel option.
- Green corridors still available adjacent to floodplain.
- Regional multi-sector interest in planning for improved bicycle infrastructure in south Fulton County

Weaknesses
- Current oversized roads within the LCI study area encourage high vehicular speeds and are hostile to bicyclists.
- There is no low-traffic route available for cyclists between historic downtown and Atlanta Metro Studios.



A multi-use trail could provide bicycle facilities in the floodplain

Opportunities
- The AeroATL Greenway Plan calls for multi-use trails connecting communities around Hartsfield-Jackson Atlanta International Airport, including a priority Roosevelt Highway Trail offering a linkage opportunity to Union City.
- Redevelopment could be an opportunity to make on-road facilities safe for cyclists and develop plan for dedicated off-road facilities.
- New roadway construction or downsizing of facilities could include provisions for bicycle travel.
- There is the potential for creation of an off-street multi-use greenway trail along the floodplain connecting the Dixie Lakes to the Town Center area.

Threats
- The major east-west roads are extremely hostile to bicycle traffic due to the speeds (Flat Shoals Road) and conflict points (SR 138).

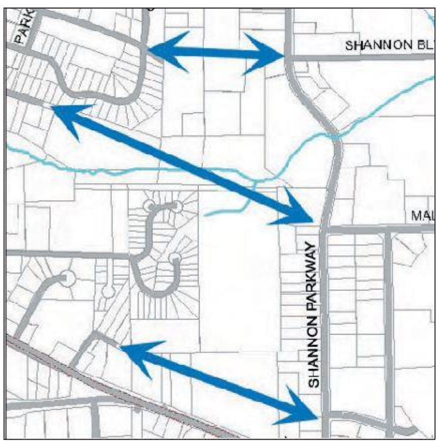
1.6 VEHICULAR SYSTEMS

Street Connectivity

Connectivity is critical to a viable transportation system. In the Study Area traffic congestion is partially due to the limited number of routes available for making trips. Accidents or other tie-ups on a single road can throw the whole system into paralysis. A well-connected grid of streets provides numerous alternative route options when any one part of the grid becomes congested.

An interconnected system allows Boston's South End to operate with no street more than two lanes wide

Connectivity is also important for non-motorized transportation. A well-connected bicycle and pedestrian system is essential to ensuring that bicyclists and pedestrians have maximum mobility options. By increasing the number of routes available for trips, the transportation system can be made less prone to significant failures.



There are many opportunities to create east-west connections

<u>Strengths</u>

- Street network is fairly well-connected in the historic downtown area.
- Excess capacity on Flat Shoals Road, Shannon Parkway, Mall Parkway, and Oakley Road can accommodate growth.

<u>Weaknesses</u>

- Disjointed street network between historic downtown and the Town Center area.
- Lack of east-west alternatives for local traffic to SR 138/ Jonesboro Road and Flat Shoals Road.

<u>Opportunities</u>

- Redevelopment of in the Town Center area could serve as a mechanism to densify the street network in this historically suburban area, while reducing block size to a workable urban village scale.
- Recent master plan calls for a 400' X 400' urban grid along Resurrection Way between Shannon Parkway and Oakley Road creating a compact and walkable mixed-use commercial hub in Town Center.
- A new street network could be created by extending Union Street and Main Street to further connect old downtown and the new town center.

<u>Threats</u>

- Development since the original LCI was completed may have already negatively impacted some of these potential connections. For example, the Cypress Pointe Drive community could be impacted by the extensions of Main Street and Union Street.

Historic Main Street could benefit from improved connectivity

This intersection balances vehicular, pedestrian, and bicycle needs

- Coordination with multiple jurisdictions will be required, including MARTA and GDOT.

Intersections

Traffic flow is often affected more by intersection and driveway operations than by street widths. As such, intersections and driveways must be addressed as part of a well-balanced system.

<u>Strengths</u>

- Intersections within the historic downtown are mostly properly sized.

<u>Weaknesses</u>

- Many intersections in town center area are too large for comfortable pedestrian crossings.
- SR 138/Jonesboro Road intersections are hazardous for vehicular traffic and hostile for pedestrians.
- Lack of access management along SR 138/Jonesboro Road creates hazardous conditions for motorists.

Curb cuts at each and every business create unsafe conditions

<u>Opportunities</u>

- Gateway placemaking opportunities at intersections such as SR 138 and Shannon Parkway
- Create sense of place for historic downtown (Watson and Union Streets) and within town center area.
- Create “100% corner” within town center at Resurrection Way and Shannon Pkwy or Londonderry Way.
- Opportunity to consolidate driveway cuts along SR 138 to make it safer for vehicles and pedestrians.

<u>Threats</u>

- Too many conflict points exist along SR 138. Driveway consolidation will require coordination among competing property owners, and may not be accomplished until turnover occurs.
- Pedestrianizing intersections may be difficult, especially those along SR 138 due to GDOT design guidelines for these type roadways.

Outside of the immediate town center area intersection operations improve

Vehicular Capacity

Vehicular capacity refers to the capability of streets to handle a given volume of traffic. It is impacted by many things, including the number of curb cuts, turning movements, and lanes.

Londonderry Way has far more capacity than is necessary

Existing Conditions

Strengths

- Quick access to major interstates and railroad shipping logistics operations.
- Excess vehicular capacity can accommodate additional growth.

Weaknesses

- There is a lack of east-west alternatives to SR 138 and Flat Shoals Road for localized travel.
- SR 138 is more a barrier than a connector between uses fronting its north and south sides. Calming measures can help to integrate the two sides of the road.

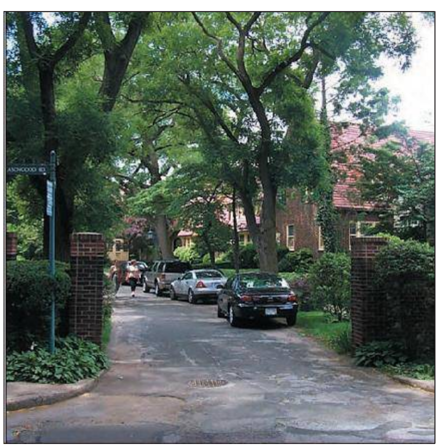
New development could provide new streets as a means of preserving capacity along key arterials

Opportunities

- Additional east-west network will serve to relieve SR 138 and Flat Shoals Road of localized traffic with both origin and destination within the study area.
- Shannon Parkway and Oakley Road will play larger roles as significant transportation facilities as redevelopment activity increases.
- Redevelopment will be accompanied by a development pattern in which the automobile is no longer the only viable form of transportation. Streets will be walkable, with uses arranged to form a “park-once” environment.

Threats

- SR 138 currently carries significant traffic loads as it approaches I-85. Additional network will be needed to minimize potential congestion impacts of redevelopment on SR 138.
- Community consensus must be won to ensure development of the needed roadway network.



Narrow streets can support attractive residential uses

Street Character

The overall character of a street is defined by bicycle, pedestrian and vehicular systems, as well as their relationships to adjacent land uses and buildings. At the same time, the character of the street has a direct impact on its ability to foster certain land uses and transportation modes. For example, a wide, high-speed street with narrow sidewalks and buildings set back from the street will fail to support anything more than automobiles as the primary means of transportation, while similar land uses and buildings pulled closer to a low-speed street with wide, shady sidewalks is much more conducive to walking, transit use, and bicycling.

Streets can be designed to carry large traffic volumes without neglecting other modes of travel

Royal South Parkway is designed exclusively for vehicles

Existing Conditions

Strengths
- Historic downtown streets with on-street parking and landscaping.

Weaknesses
- SR 138/Jonesboro Road is completely auto-oriented.
- Royal South Parkway includes the MARTA Park and Ride Lot but is completely auto-oriented.
- Roadways within the town center area are oversized for the traffic they serve and have few amenities for pedestrians.
- Many corridors in the town center area are lined by large flat parking lots with minimal shade or landscaping.

Opportunities
- Redevelopment opportunities will allow for making streets more pedestrian-scale and tamer for all modes of travel.
- New construction of roadway network can include design elements that balance livability and travel service.

Threats
- Jurisdictional coordination will be required to ensure that the proposed new and modified roadway sections are allowable under current guidelines. If not, guidelines may need to be changed.
- Operational analysis will need to support that SR 138 can be tamed without significantly impacting its car-carrying capacity.
- Designing streets with amenities for travel other than simply motor vehicles may require education within the community to gain consensus.

1.7 PARKING

On-street parking is essential for street-oriented retail

Overview

Parking is essential in the modern community, but it must be balanced with other considerations to avoid compromising a community's quality-of-life. The amount, location and the design of parking can significantly impact mode choice, land use, and site design.

Parking utilization is affected by three components:

- ***Amount of Parking:*** Parking arrangements that reduce costs for developers, as well as preserving valuable land for more productive uses, can be integral to attracting quality development that supports all modes of transportation.
- ***Location of Parking:*** Locating private parking areas to the side or rear of buildings and providing on-street parking in front can balance the necessary amounts parking for the establishment's success, while minimizing negative impacts. Clustering new parking areas can also reduce distances between buildings for pedestrians.
- ***Design of Parking***: Traveling between point A and point B is a process largely affected by physical features. It is important to recognize the significant way that physical landscape, including the design of parking, can impact the travel decisions of commuters.

Shannon Mall will require ample parking unless densities within walking distance increase

Reductions in the amount of parking provided can make dramatic changes in land use and the way a site is designed. Parking incentives or disincentives can encourage travelers to choose an alternative form of transportation, encouraging walking, biking, transit usage and community interaction.

Parking management strategies employ a variety of methods to ease demand for parking while encouraging the use of alternative commute modes. Parking management limits the availability of free and subsidized parking. Residential and commercial parking permits, parking pricing, time restrictions, and other strategies are included in general parking management.

Along Main Street in Lexington, MA, parking is located behind shops

Bicycling and walking facilities can also decrease parking demand. The willingness to walk or bike is directly related to the quality of the environment in which to do so. Pedestrian and bicycle corridors on-site may provide safe means across parking lots or campus facilities. These increase the ability to travel along a multi-modal corridor, resulting in increased support for pedestrian and bicycle travel. A short, non-motorized trip can substitute for a longer car trip (i.e. a shopper might choose to walk to a local store instead of driving).

As this aerial shows, a good portion of the Shannon Mall area is surface parking

The parking lot at Shannon Mall includes a driver training area

Structured parking will only be feasible over the long-term

Existing Conditions

Free parking is available throughout the Study Area, and primarily consists of large privately owned surface parking lots located directly in front of individual developments. Major generators of parking demand are the mall and big box retailers. West of the Study Area, in the historic downtown area, free on-street parking is available.

Currently, there is no one entity managing parking in the Study Area. On-street parking is managed by the City and private parking is managed by individual property owners or a property management company. Three specific parking management opportunities for the Study Area are discussed below:

- ***On-Street Parking:*** As the street system is improved on-street parking, beyond the amount offered in the downtown, will create a parking opportunity. It will support restraints on the supply of off-street parking and create a buffer between pedestrians and vehicles. It may also be regulated by time. Used in commercial areas, this strategy will encourage a turnover of shoppers and discourage commuters or employees from parking directly in front of a retail establishment.
- ***Preferential Parking:*** Preferential Parking programs reserve the most convenient parking spaces, primarily at office parks or buildings, for carpoolers and vanpoolers. Preferential parking provides incentives for those in carpools and vanpools to continue ridesharing.
- ***Shared Use Parking:*** To maximize the land use within the LCI Study Area, employers with traditional work hours can share their parking spaces with businesses that operate primarily during non-traditional working hours. This practice maximizes parking efficiency by using off-peak parking that is left empty during weekends and evenings.

The GDOT-owned MARTA South Fulton Park and Ride lot currently offers 420 spaces and on an average weekday is less than 5 percent utilized. An opportunity exists for relocating the park and ride lot to an area accessible by transit, vanpools, walking, biking as well as by single occupant vehicle, while also being located within a short distance of retail and other conveniences that will encourage trip chaining (combining several trips into one).

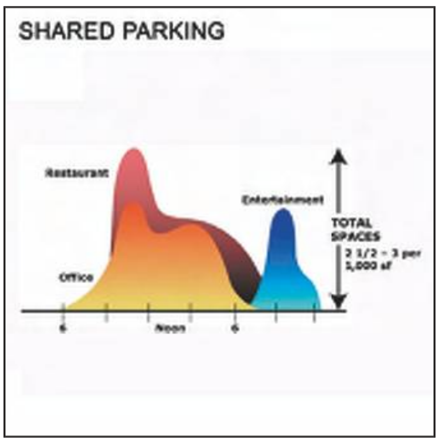
Strengths

- Existing parking supply

Weaknesses

- Location of the GDOT-owned MARTA South Fulton Park and

Without shared parking, the total number of spaces is additive



With shared parking, the total number of spaces is based on peak demand

Ride lot, which is not adjacent to high density land uses and functions solely for those commuters who elect to drive to the park and ride lot and continue their commute via bus or carpool.

- Low Acceptance of Parking Charges. Suburban parking charges are rarely implemented in the Atlanta Region. The true cost of parking is hidden within development fees and retail rents. Parking is also perceived as making properties more desirable for would be buyers, tenants and shoppers.
- Zoning and Development Regulations, which prohibit extensive sharing of parking spaces
- Low Diversity of Uses. Currently the Study Area lacks a well-grained mix of uses. Without this, the parking demand is more difficult to manage.
- Lack of Density, which discourages walking between retail centers and therefore additional parking is required to accommodate each retail establishment.

<u>Opportunities</u>

- Shared parking, which could reduce the overall parking and increase utilization.
- Support of pedestrian and bicycle facilities, which could decrease parking demand.
- On-street parking, which could support street-retail
- Preferential parking, which could support ridesharing or biking.
- Bicycle parking
- Structured parking, which could reduce the amount of land devoted to parking, but will not be financially viable for several years.

<u>Threats</u>

- Inflexible zoning.
- Retail prototypes, which require certain parking ratios.

1.8 TRANSIT

This bus stop in Barcelona, Spain is anked with transit-supportive land uses and includes posted schedules

Overview

Providing commuting choices is a major tenet of smart growth. Transit provides an alternative option of getting to work, school, shopping and other community services for those with cars, and serves a critical transportation need for those without. It also supports pedestrian friendly, mixed use, and higher density development.

Transit becomes attractive to a variety of users when it is:

- Frequent
- Accessible by walking, biking and vehicle
- Near shopping and other conveniences

The Study Area includes this MARTA park and ride lot at the Flat Shoals Road I-85 exit

Existing Conditions

Three existing bus routes serve the Study Area:

- 180: Palmetto/Fairburn: This route travels roundtrip from downtown Palmetto, through Fairburn along Roosevelt Highway to the College Park MARTA Station. There are approximately 20 minute headways during peak periods. The travel time from downtown Palmetto to the rail station is approximately 40 minutes.
- 190: This route travels roundtrip from Shannon Mall to the South Fulton Park and Ride lot to the College Park MARTA station. There are 45 minute headways at peak period. Travel time from the mall to the rail station is approximately 35 minutes.
- 89 F: This route travels roundtrip from the South Fulton Park and Ride lot via Old National to the College Park MARTA station. There are approximately 15 minute headways at peak period. Travel time from the park and ride lot to the rail station is approximately 30 minutes.

A transit rider catches the 89F bus

Connections to the College Park MARTA rail station and peak hour usage suggests that the majority of the travel is commute-oriented.

Significant challenges to the existing system include limited transit priority measures or HOV lanes to accelerate transit travel times, resulting in a time savings for commuters south of College Park and substandard roadway infrastructure in and around the Study

Buildings set back from the street discourage both walking and transit use

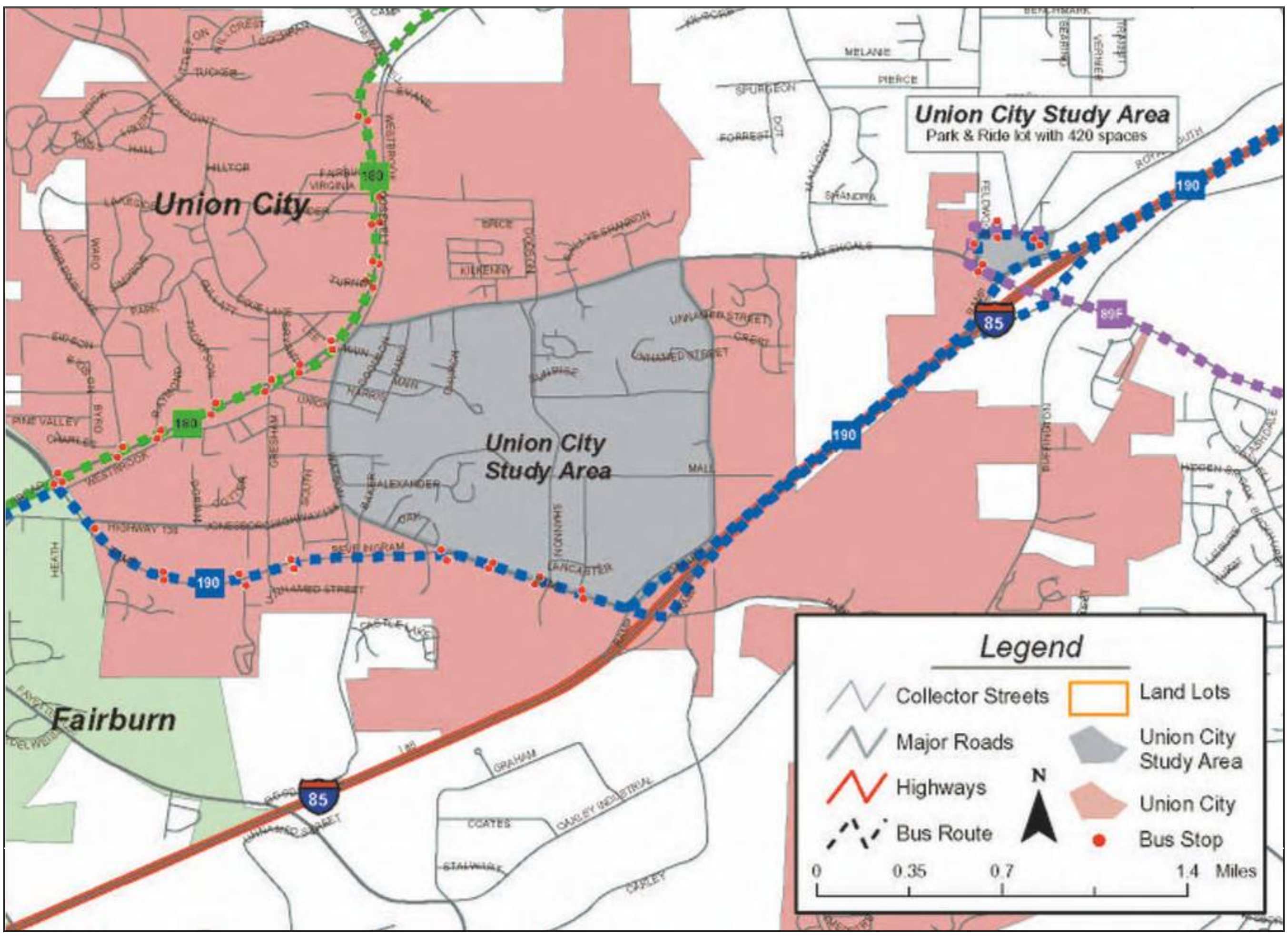
Area. MARTA is not able to use several roads and bridges. When buses are able to travel faster, or take a more direct route than single occupant vehicles, transit can become a more desirable option.

In addition, there is little congestion between the South Fulton Park and Ride Lot and the College Park MARTA Rail Station to encourage commuters with access to vehicles to take transit. The College Park MARTA Station has over 2,000 free spaces. For transit users going to the airport, a transfer is required at the College Park station. While more costly park, it is quicker to drive directly to the airport.

Transit users usually rely on connections with other modes to make their trips. If these connections are inconvenient or uncomfortable, transit use may be discouraged. There is currently poor sidewalk and pathway access to transit stops in the Study Area. Transit amenities are also limited at bus stops, including a lack of bus shelters, bicycle parking, and schedules. An opportunity exists to integrate transit and transit support measures into the Study Area's development.

Below: Map showing existing transit routes within the Union City Town Center Study Area

The combined lack of transit supportive development patterns, including the extent, type and location of parking, severely limits the



Shannon Parkway cannot be used by MARTA buses due to structural problems

convenience and desirability of transit by creating areas that are not easily accessible, except by vehicle. Without changes in land use and density, transit may not be an attractive alternative for those who have access to vehicles. Integrating transit into new development is a key opportunity. There are also support services that can be provided to residents and employers to encourage transit use, including:

- General promotion and marketing to educate and encourage commuters to use transit. Transit promotion activities can include brochures, posters, how-to classes, and free-ride days, and other marketing efforts.
- Information centers, potentially at the mall or town center area, that provide a central location for obtaining commuter information. This can include bus route maps, schedules, passes, ridematching services, vanpool sales, and more.
- A Transit Riders Guide oriented to new bus riders can help overcome any predispositions commuters might have against riding the bus, usually due to a lack of information on bus routes and service times. Previous research indicates that "not knowing what to do" is the number two reason (besides convenience) that people state they do not ride the bus.
- Transit incentives, including cash, for not driving alone.

MARTA bus shelters provide minimal transit-rider amenities

Strengths

- Served by existing MARTA bus routes
- Nearby train station.

Weaknesses

- Lack of incentives to take transit.
- Land uses and parking does not support transit use.
- Limited intermodal integration.
- Lack of transit infrastructure.

Land use patterns in this new development in Maryland support transit

Opportunities

- Transit Priority Measures: Ensuring that HOV lanes, transit signal priority measures, and the availability of real time travel information are planned for the short term will support recommended transit improvements.
- Education and incentive programs.
- Improvements to travel headways and travel routes.
- Integration of transit and transit support measures into development and redevelopment recommendations.

Threats

- Perception of transit
- Standard suburban development patterns

Rivers and creeks impact the development of adjacent land

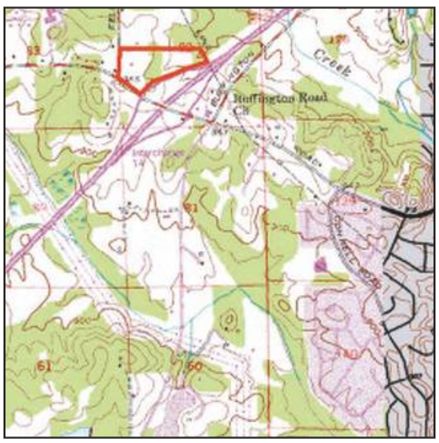
1.9 NATURAL SYSTEMS

Overview

Natural systems are the vegetative, hydrologic and topographic features that define an area. They should serve as the basis for all planning decisions, as they directly impact the suitability of certain lands for development.

In the context of metropolitan Atlanta, the most significant natural system affecting development suitability is hydrology. Rivers, streams and oodplain areas are government by strict combination of state and federal laws that directly impact the ability to develop in and near them. These regulations are reviewed below:

Floodplain Regulations: The Federal Emergency Management Agency's (FEMA) Federal Insurance and Mitigation Administration's Hazard Mapping Division maintains and updates a set of National Flood Insurance Program maps that show all 100 and 500 year oodplains within the United States. Through the National Flood Insurance Program (NFIP), a federally backed ood insurance program, communities are encouraged to enact and enforce oodplain regulations. To be covered by a ood insurance policy, a property must be in a community that participates in the NFIP. FEMA regulations



Map of park and ride area (Source: USGS Topographic Map of Fairburn, GA, 1981)

River and Stream Bank Protection: Georgia State Law, adopted in 2000, requires a minimum 75-foot natural undisturbed setback from the stream bank, on both sides of any stream. This creates a continuous, linear protected area, which, including the stream itself is more than 150 feet wide.

Existing Conditions

Map of core Study Area (Source: See above)

The Union City Town Center Study Area is marked by the rolling landscape typical of the Georgia Piedmont. Virtually no portion of the Study Area is level, with the exception of the area between running from Shannon Parkway across Londonderry Way and to the western edge of Shannon Mall. The Study Area includes several high points, most notably near the intersection of Flat Shoals Road and I-85, the intersection of Alexander and Baker Streets, the northwest portion of the Study Area, and along the northern portion of Oakley Road. Low points are found along Windham Creek. See the United States Geological Survey Quad maps at left for detailed topography.

Much of the undeveloped land within the Study Area is covered with forests. These forests are relatively young, having grown back within the past one hundred years after the original old-growth forests were

Aerial photo showing the forested area along Windham Creek

clear cut by early settlers. The largest concentration of forest land occurs between Shannon and Mall Boulevards; from there it extends to the west. Some small undeveloped parcels of land along Flat Shoals Road are fallow farmland.

The most significant natural feature in the Study Area is the presence of Windham Creek. This creek runs west-to-east through center of the Study Area. It includes a small tributary that ows from a pond near McGillicutty Way. The creek and its tributaries include significant areas of FEMA-identified ood zones. The 100 year ood zones are found in the forested area between Shannon and Mall Boulevards, while 500 year ood zones occur along the creek, to the west. Much of the 100 year ood zone remains undeveloped, while the 500 year ood zone has been built upon with commercial development along the southern end of Shannon Parkway.

The forests, 100 year ood zones, and areas along Windham Creek represent opportunities for open space protection and park space.

Greenway trails often run along rivers and streams

<u>Strengths</u>

- Level ground between Shannon Parkway and Shannon Mall.
- Presence of Windham Creek.
- Presence of forested areas.

<u>Weaknesses</u>

- Topographic development challenges.

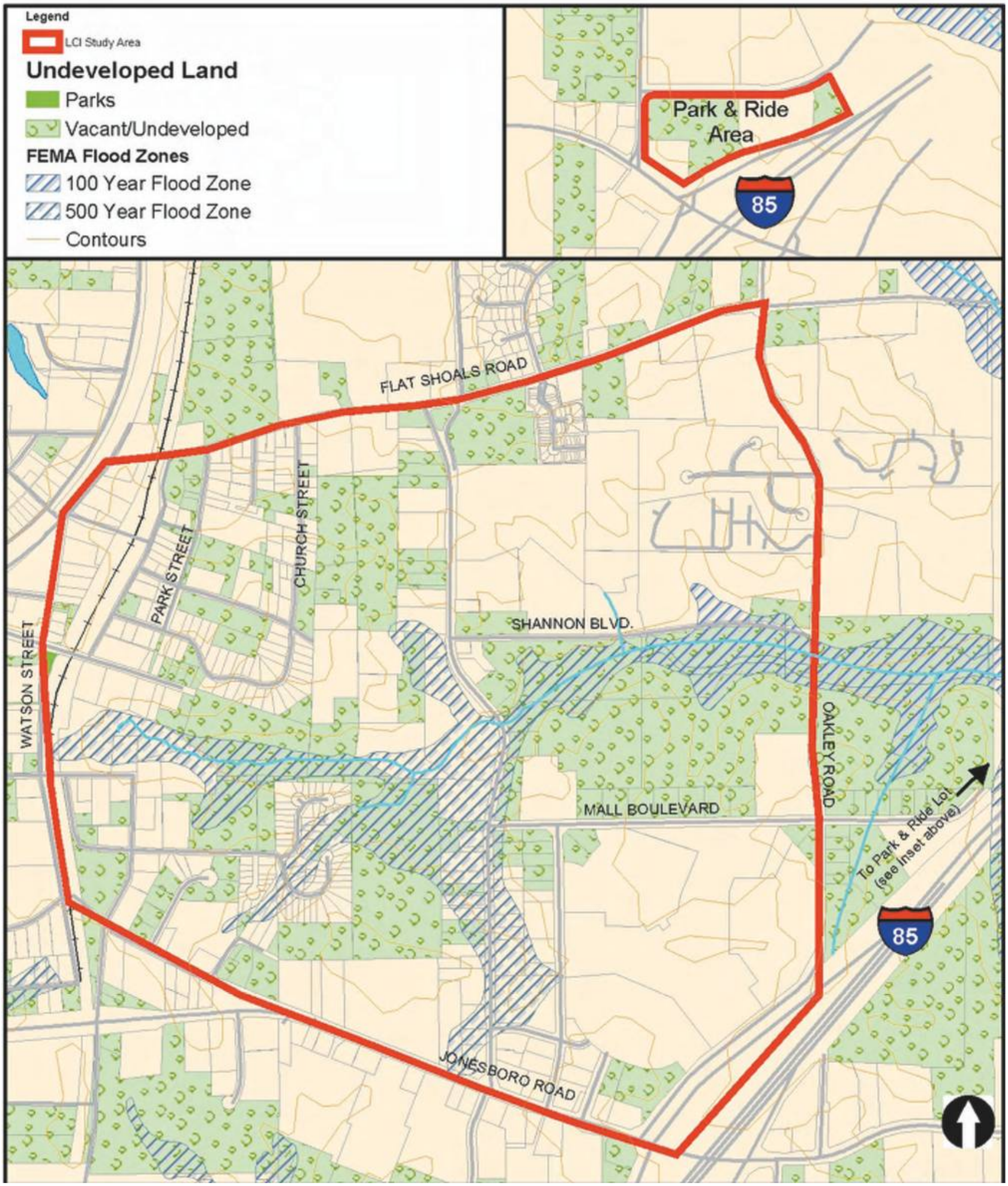
<u>Opportunities</u>

- Flood plain and stream bank protection.
- Open space potential.

<u>Threats</u>

- Poorly planned new development could occur without sensitivity to topography or other natural systems.

NATURAL SYSTEMS



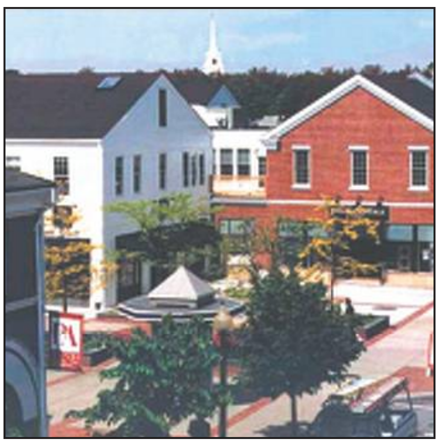
1.10 PUBLIC REALM

A mother experiences a pedestrian-oriented public realm

Overview

Public spaces are foundations upon which American democracy is based. Whether plaza, park, or national forest, publicly owned spaces represent collective grounds shared by all Americans. They are the basis of many of the basic freedoms that many take for granted.

In a world where people are increasingly isolated from one another by technology and the fast-paced lifestyles it creates, people are increasingly recognizing the value of spaces that allow them to connect with other people. In fact, one of today's hottest real estate trends is the community where people can partake in a wide variety of public spaces on a daily basis. Many people no longer want to drive many miles to walk down a pleasant, tree-lined sidewalk, play in a park with their children, or relax on a warm summer evening. They now want communities that provide all of these public space opportunities and more.



A plaza surrounded by mixed-use buildings in Mashpee, MA

There are five major categories of public space in the USA, each with their own distinct definition and applicability:

Streets and sidewalk are the most often used public spaces in towns and cities. In addition to serving as a transportation conduit, streets and sidewalks can be designed to encourage human interaction and community building. Streets can serve as parade routes or the location of special festivals, while in-town sidewalks can provide room for cafe dining, street furniture, and street trees.

Plazas are hardscaped gathering spaces located in a town or city center and surrounded by commercial, mixed-use, or civic buildings. Plazas often include fountains, benches and similar elements. Their entire surface is accessible to the public and consists of stone, concrete, or durable pavement interspersed with trees and limited plant materials.

A park is the center of a neighborhood of Harbor Town, near Memphis

Parks are landscaped recreation and gathering places that can be located in any area of a town or city. They may be surrounded by residential or commercial buildings, and are often the focal points of neighborhoods. Parks often include picnic facilities, drinking fountains, benches, playgrounds. Larger parks may include ponds, sports fields, and courts. Well designed parks are defined at the edges by streets. Their accessible landscape consists of paths, trees, lawns, shrubs and other plant materials.

Greenways are linear parks that can serve as corridors for transportation, wildlife migration, or protection of key habitats that

This Atlanta greenway is an environmental and recreational amenity

occur in a linear manner, such as the riparian zones along creeks and rivers. Greenways can also connect plazas, parks and conservation lands. Because of this, they can be located in virtually any setting with varying sizes.

Conservation Lands protect and enhance areas of environmental and historic significance. They are usually located at the end of a village, town or city. Because their primary purpose is the protection of open space, they can include camping sites and trails.

Existing Conditions

A quality public realm within the Study Area is, for the most part, lacking and poorly-defined. With the exception of Mayor's Park, located in the western portion of the Study Area at the corner of Watson and Church Streets, there are no public parks, plazas or conservation lands available. Numerous opportunities exist, including vacant lands within the Study Area and upgrades to the area around the small lake near McGullicutty Way. Opportunities also exist to create plazas or parks as part of new redevelopment of underutilized commercial properties; such could create a focal point for both the Study Area and City of Union City. These, and other opportunities, however, could be lost with poorly planned future development.

The pond near McGillicutty Way is an underutilized asset

The primary way to experience of the public realm in the Union City Town Center Area is through driving down the street. Years of auto-oriented planning have created streets, land-uses, and streetscapes that have ensured the primacy of the auto-mobile as the transportation mode of choice. This said, even from a driver's point of view, the public realm experienced behind the wheel is anything but appealing in most of the Study Area. A variety of factors, including generic architecture, lack of landscaping, signage, and above-ground utilities create a public realm that is chaotic, ugly, and rapidly approaching obsolescence.

The public realm in the Study Area is best experienced while driving

The following summarizes the public realm strengths, weaknesses, opportunities and threats within the Study Area:

<u>Strengths</u>

- Mayor's Park.
- Private amenities .

<u>Weaknesses</u>

- Lack of open public usable spaces.
- Auto-oriented streets.
- Unattractive commercial streets.
- Missing sidewalks.

Neighborhoods should not be designed without adequate parks

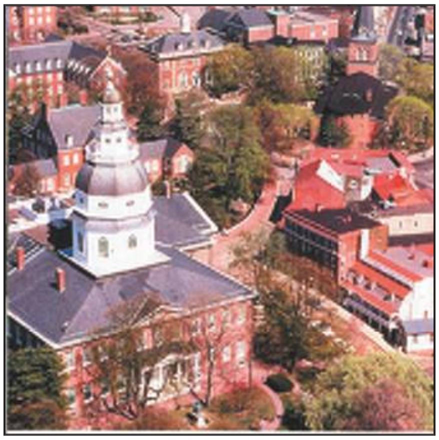
Opportunities

- Windham Creek.
- New public spaces on undeveloped land.
- New public spaces on redeveloped land.
- Greenway corridors.
- Town center plaza or park.

Threats

- Development, which could occur without appropriate open spaces.
- Poorly designed open spaces, which could limit their use and fail to capitalize on the need for a community focal point.
- Poorly located open spaces, which could result when open spaces are relegated to the sites with least development potential.

1.11 LAND USE AND LAND USE REGULATIONS


Annapolis, MD, features a fine-grained mix of uses

Overview

Land uses and the relationship between them impact the quality of life in a community. Different land uses have varying impacts on transportation and utility systems. The physical arrangements of these land uses and their proximity also support or discourage the use of different modes of transportation, including bicycling and walking; this can directly impact the vehicular system by reducing or increasing automobile traffic.

Towns and cities were traditionally built at mixed-use environments featuring housing, shops, offices, religious institutions, schools, parks, and factories all within a short walk of one another. As the benefits of mixed-use areas become know, it becomes increasingly important to understand the types of uses that can operate in close proximity. Many uses are very compatible, including retail, office, open space, civic and residential uses. Other uses, such as industrial and transportation services, are more difficult to reconcile with other uses in a mixed-use setting.


New townhouses along Oakley Road

Existing Land Uses

The majority of the Study Area's 782 acres are marked by the suburban development pattern of segregated uses. The only exception to this is the Study Area's northwestern portion, which, due to its greater age, exhibits the finer grained land use patterns found in traditional community development.

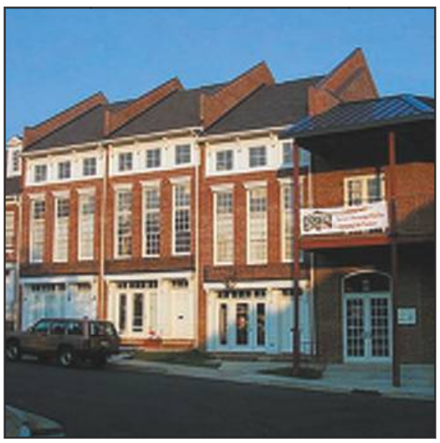
Generally, land uses can be clustered into four major sectors. The south and southeastern portion of the Study Area, including:

Land Use	Acres	% Study Area*
Parks	0.5	<1%
Single Family Residential	116.5	15%
Multifamily Residential	114.5	15%
Commercial	184.5	23%
Industrial	11.0	1%
Public/Semi-Public	12.0	1%
Transportation/Comm./Utilities	22.0	2%
Vacant	241.0	31%
Streets	81.0	21%

*Based on percent of total land area


Vacant land on Mall Boulevard could be developed into a mix of uses

The park-and-ride is surrounded by auto-oriented uses and vacant land



These townhomes in North Carolina have small shops at ground level

Shannon Mall, is marked by the low-density, automobile-oriented commercial uses commonly associated with interchanges. Many of these uses are fast food restaurants, gas stations, and shopping center. These uses, with their accompanying parking areas, are the defining characteristic of the Study Area. North of this is a large tract of multifamily residential developments, while to the west are many older single-family homes and Union City's traditional downtown, which is now largely a governmental center. The South Fulton Park and Ride Lot is just that – parking; land uses around it fail to encourage transit use or create a pedestrian-friendly environment.

Strengths

- Various land uses within the Study Area.
- Combination of single-family and multi-family housing.
- Different commercial types.

Weaknesses

- Lack of connectivity between land uses.
- Horizontal segregation of uses.

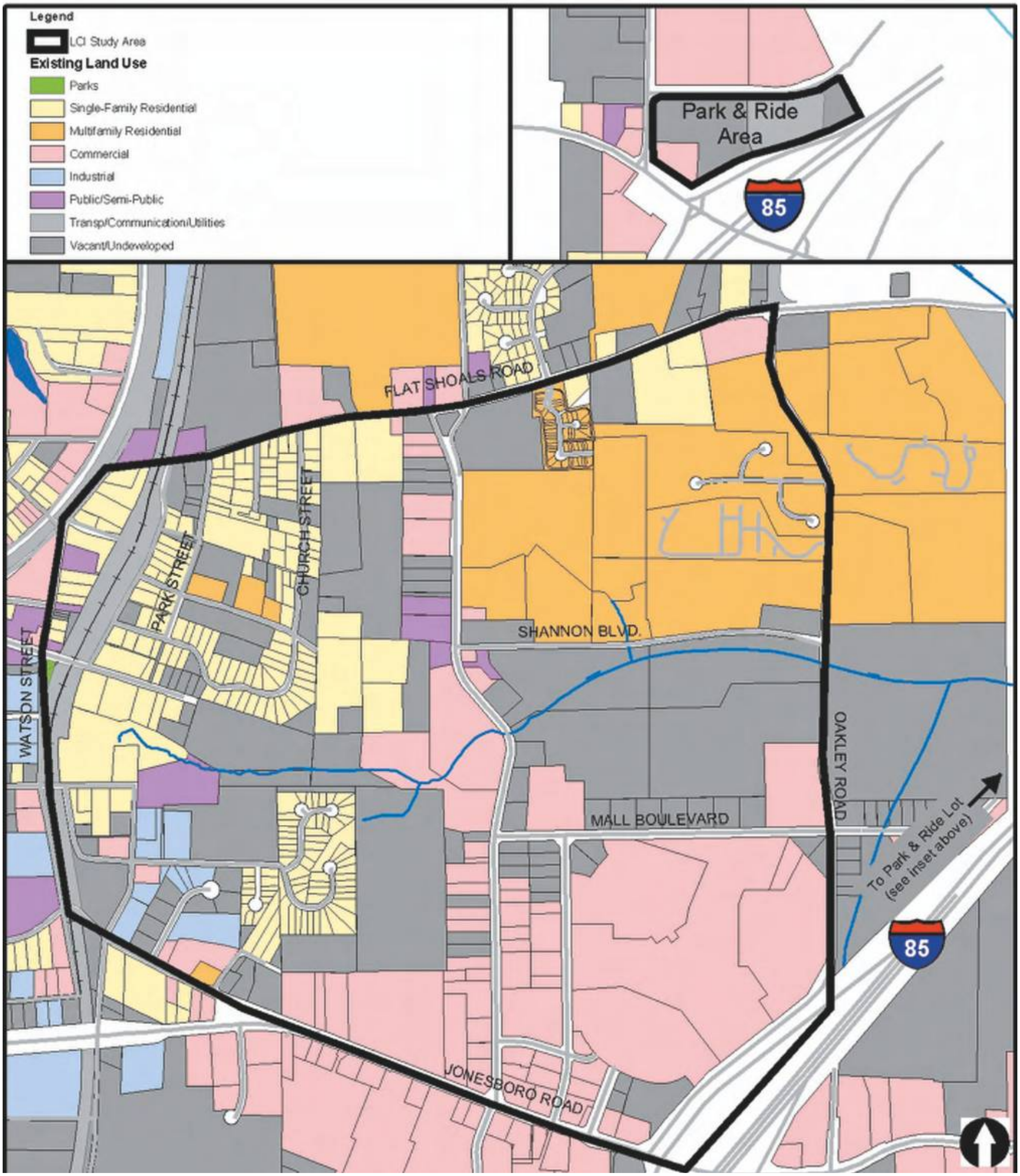
Opportunities

- New development mixing housing with commercial.
- Horizontal mixed-use, wherein uses are close to each other.
- Vertical mixed-use, wherein uses are above each other.
- Retail and housing trends now favoring large-scale, mixed-use environments.

Threats

- Zoning, which discourage or outlaws mixing uses.
- Commercial sprawl, whereby existing retail facilities are abandoned in sake of newer ones, leaving vacant buildings.
- Financial markets, which can make it difficult to finance mixed-use projects.

EXISTING LAND USE



This undeveloped land is classified as Multifamily Residential

These homes were built in an area with a Mixed Use classification

Future Land Use Classifications

The Union City Comprehensive Plan establishes future land use classifications for all areas of the city. The classifications need not comply with current on-the-ground uses, but rather reflect desired long-term land uses. Under Georgia law, the future land use plan serves as the legal basis for rezoning activity on the part of the County or City. Therefore, it is important that such plan accurately reflects the desired vision for an area. In this way, these classifications should direct public infrastructure improvements that support the desired future land use.

Within the Study Area, the Future Land Use Plan shows Commercial in the southern half of the Study Area, south of Union Street and along Shannon Parkway. North of Union Street, in the northwestern sector, the Plan shows Mixed Use, which is not consistent with the area's historic role as a residential neighborhood. The rest of the Study Area is shown as Multifamily Residential. The GDOT park-and-ride lot is not shown on the Plan because it is currently not within the City of Union City limits.

<u>Strengths</u>

- Various classifications within the Study Area.
- Existence of a Mixed Use classification.

<u>Weaknesses</u>

- Current Plan segregates residential and commercial.
- Extensive Commercial classification within the Study Area.
- Mixed Use area does not include Shannon Mall area.

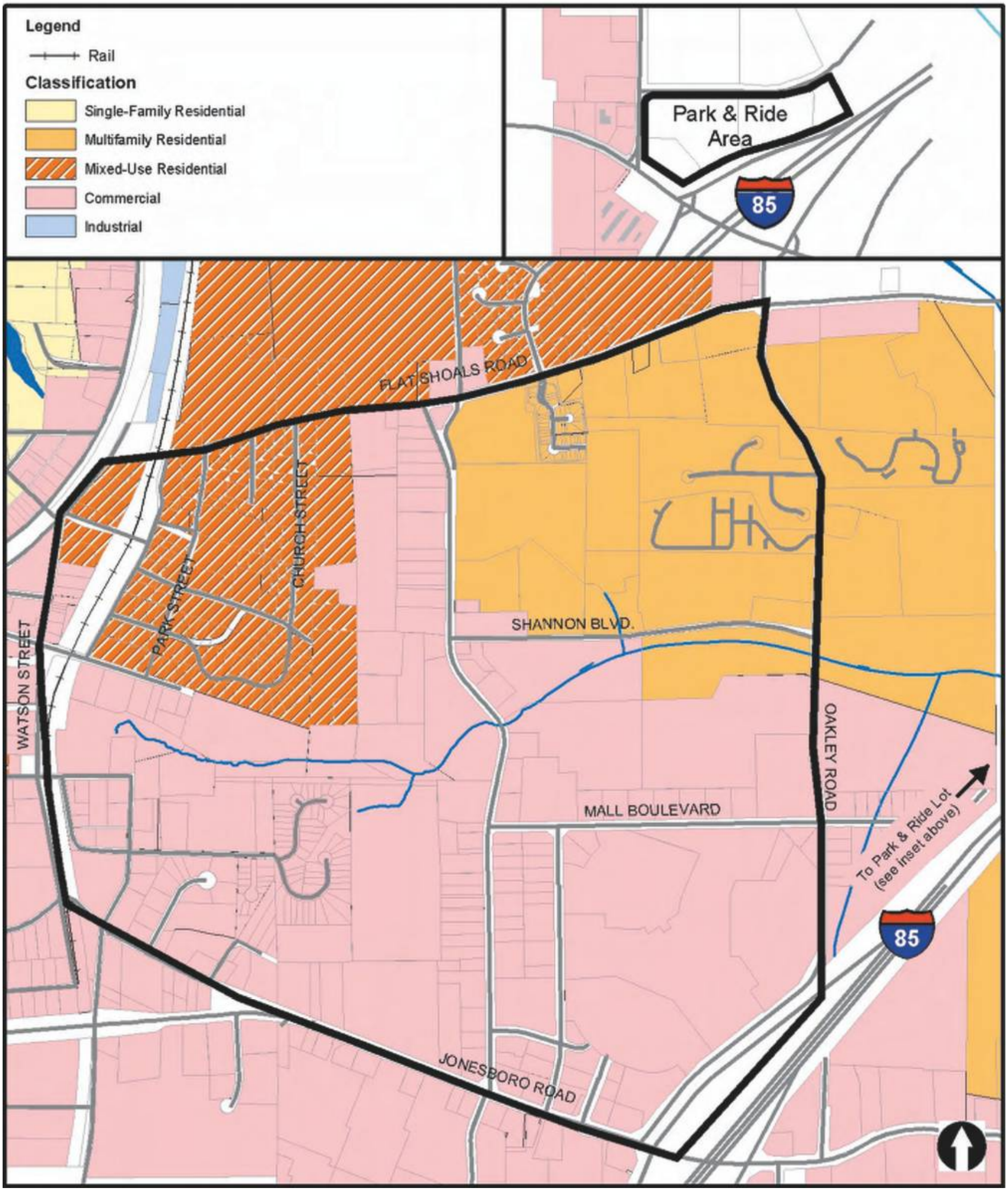
<u>Opportunities</u>

- Changes to Future Land Use Map.

<u>Threats</u>

- Resistance to change.

UNION CITY LAND USE PLAN CLASSIFICATIONS



Zoning can support pedestrian-oriented land use patterns and buildings

Zoning can support auto-oriented land uses patterns and buildings

Too much commercial zoning supports abandonment of older facilities

Zoning Designations

The City of Union City regulates development through the use of zoning. Zoning districts control things such as height, use, setbacks, parking, etc. They are the implementation tool of the Comprehensive Plan and should support the desired future land uses. Because it directly shapes development, zoning has a profound impact on the built environment. More than any other single element, a zoning code affects how a community looks and functions for decades.

There are nine districts present in the Study Area, as follows:

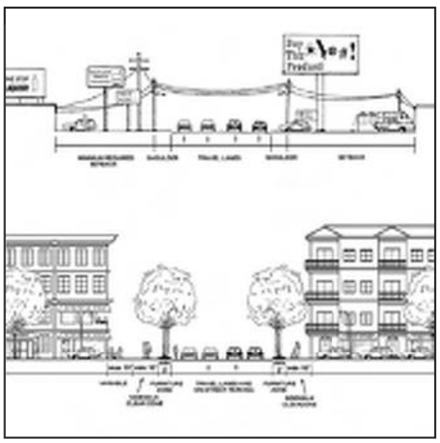
District	Parcels	% Study Area*
R-2 Single Family Residential	13	3%
R-4 Single Family Residential	108	17%
R-6 Single Family Residential	5	4%
RM Residential Multifamily	81	15%
NC Neighborhood Commercial	11	4%
GC General Commercial	126	39%
RSC Regional Shopping Center	6	12%
M-1 Light Industrial	15	3%
PUD Planned Unit Development	2	3%

*Based on percent of total land area, not number of parcels

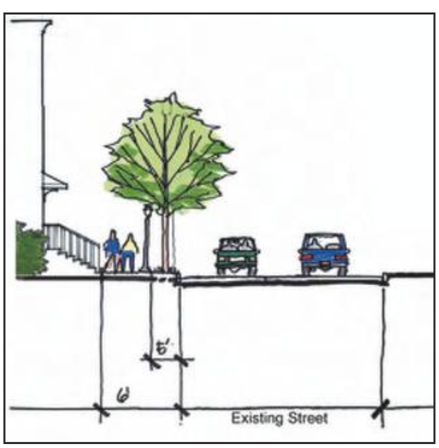
General Commercial constitutes 39% of the Study Area. This may be more commercial land than is actually wise or needed. An overabundance of commercially-zoned land encourages businesses to vacate, rather than redevelop, existing buildings for new ones nearby, This, in turn, encourages commercial sprawl.

With the exception of PUD, the districts within the Union City Town Center Study Area are predominantly single-use. To protect single-family neighborhoods from commercial encroachment, R-2, R-4 and R-6 permit no commercial uses other than low-intensity home occupation businesses or daycare uses; the same regulations exist for RM districts. Similarly, in NC, RSC and M-1, residential uses are not permitted. Limited residential uses are permitted in GC, where live-work units are allowed to accommodate business owners who wish to reside in an otherwise commercial property, “for the purpose of providing additional security and easy access to the business.” The City does, however, have an MXD (Mixed Use Development) overlay that allows for a mixture of housing and complimentary uses, provided that residential uses comprise more than twenty-five percent of the total development area

There are no design guidelines in zoning for new homes



Zoning can transform an area over the long-term



Zoning can require wide sidewalks and pedestrian-oriented buildings

Zoning is largely responsible for the disconnected and auto-oriented character present today. There are no sidewalk requirements, and street and sidewalks connections between new developments are not encouraged. In fact, the code requires a buffer or "no man's land" between residential and commercial districts. While this may be appropriate when commercial uses are auto-oriented big-box retailers or other conventional formats, such is not desirable when developed with smaller-scale, neighborhood-oriented businesses.

In commercial districts front setbacks of 50 feet make is impossible to build pedestrian-oriented, street fronting buildings without going through a variance process. In these districts minimum lot widths of 70 feet and side setbacks of 20 feet make it impossible to recreate Main Street-style shopping environments where buildings are narrow and continuous. Parking requirements also prohibit shared parking between parcels or business; this encourages more parking than may be needed. Opportunities for reductions are not provided, although parking can be provided off-site through an appeal to the Board of Zoning Appeals. Finally, commercial districts have no focus on design - resulting in the visual blight that exists. They do not even require sidewalks in new development.

Residential districts are slightly more conducive to the creation of a quality built environment. Front setbacks vary from 20 to 50 feet, while side setbacks vary from 10 to 15 feet. However, the allowance for parking in the front yard of R-2, R-4, and R-6 districts is detrimental to creation of a visually pleasing and pedestrian friendly community.

Strengths

- Mix of districts within the Study Area.
- Existence of the MXD district.

Weaknesses

- Zoning at odd with goals of the LCI program.
- Sign regulations, which allow 45 feet high signs.
- Lack of design requirements.
- Parking regulations.
- Overabundance of commercial zoning.

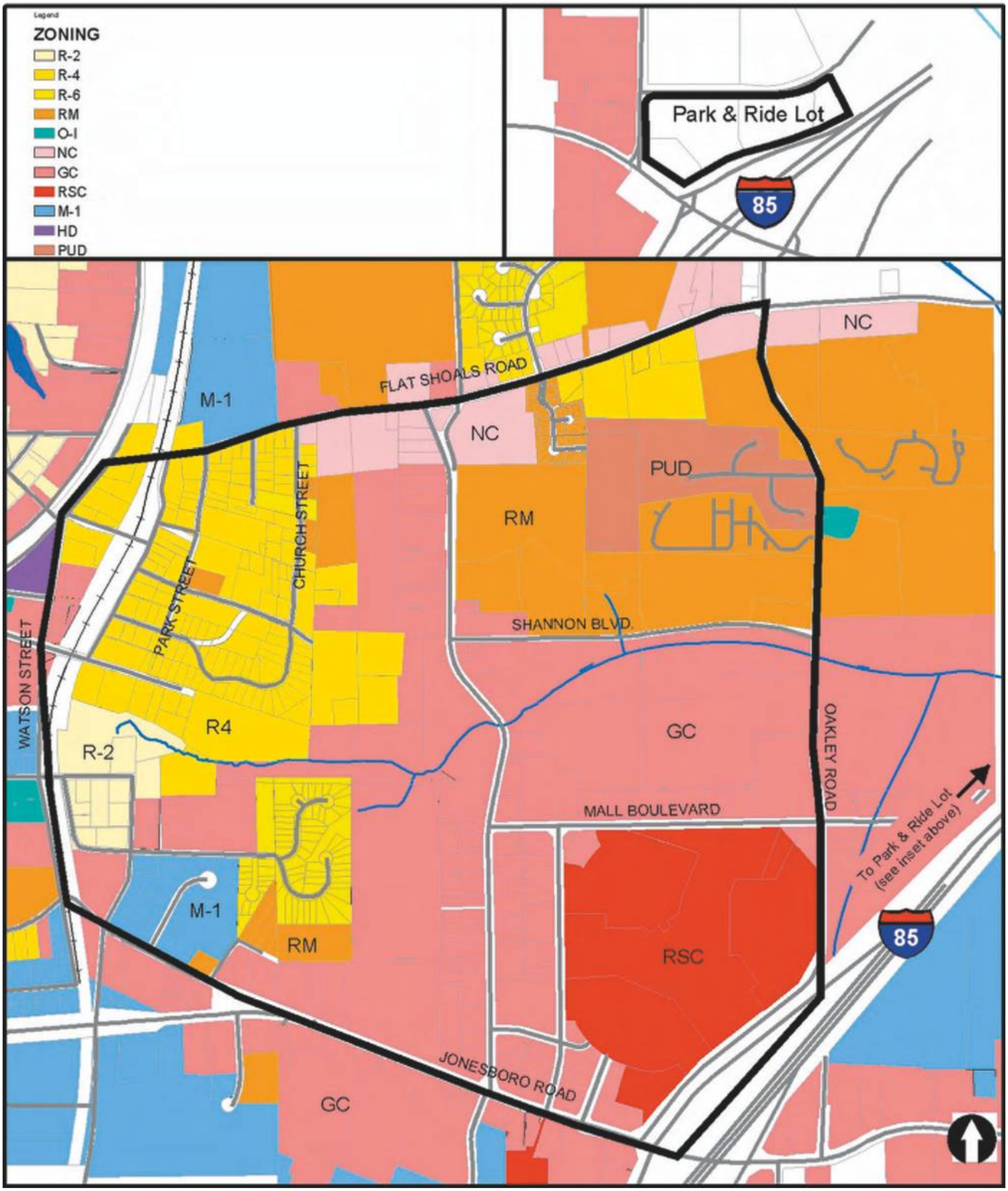
Opportunities

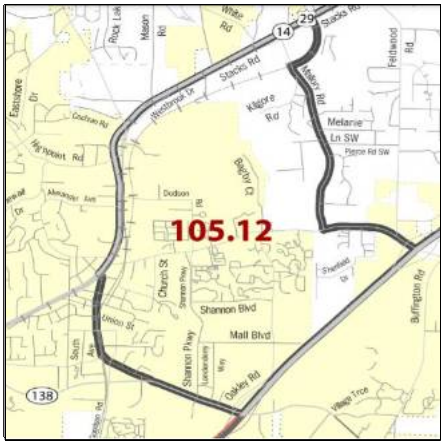
- Rezoning to MXD district.
- New Town Center zoning district.
- Sidewalk and connectivity requirements.

Threats

- Resistance to zoning changes.

EXISTING ZONING





Census tract 105.12, the "study area tract" contains the LCI study area and surrounding communities in Union City and beyond

New development in the northwest portion of the Study Area

1.12 DEMOGRAPHIC PROFILE

Market overview

The following demographic profiles use Fulton County census tract 105.12 (the "study area tract") as an approximation of the LCI study area. The study area is wholly contained within the tract, however, it extends beyond the LCI boundaries encompassing an area north of Flat Shoals Road to Roosevelt Highway and east of Oakley Road to Mallory Road. While the tract geography is not precisely congruent with that of the study area, it is a reasonable unit for analysis of neighborhood-level demographic data.

In summary, the study area tract:

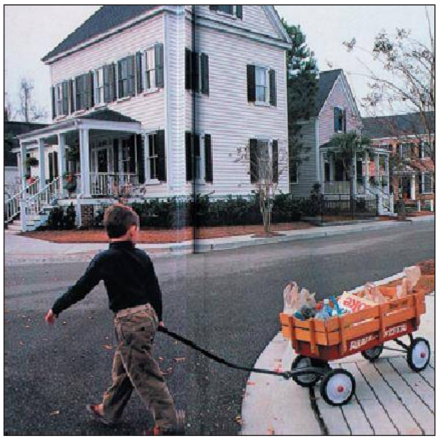
- Is expected to grow by 17% (1,200 people) by 2050;
- Has a relatively young median age of 29.1 years;
- Has one third of its population with an annual income between $25,000 and $49,999; its median family income level is $43,708, less than half Fulton County's median family income level;
- Is predominately Black or African-American;
- Has residents who are predominantly employed in the transportation, warehousing, and utilities or the arts, entertainment, recreation, accommodation and food services industries.

Population and Household Growth

The Atlanta Regional Commission forecasts a population increase of 1,268 people in the study area tract by 2050, a 17% increase over the current population. Growth in households over this time is expected to slightly outpace population growth, with a forecast increase of 18.5% (582 additional households). This is a relatively modest rate of growth but even so, housing development and infrastructure will be required to meet the needs of the larger population.

Study Area Tract	Estimate/Forecast			% Change
	2020	2040	2050	2020-2050
Population	7,467	8,346	8,735	17.0%
Households	3,147	3,531	3,729	18.5%

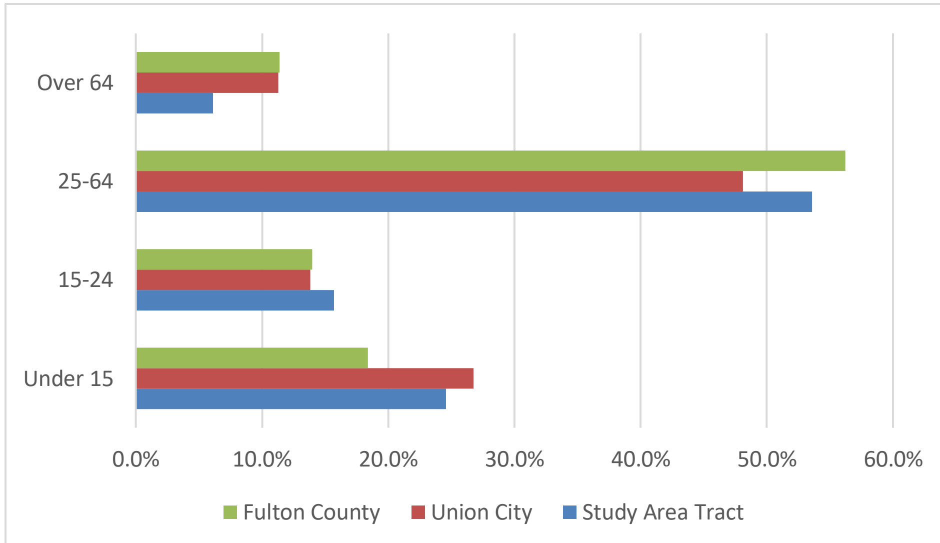
Source: ARC Series 16 Population Forecast Data



Children benefit the most from walkable communities

Age Distribution

In 2019, the median age within the study area tract was 29.1 years, slightly younger than the 30.3 years within Union City as a whole. Key age distribution breaks include:

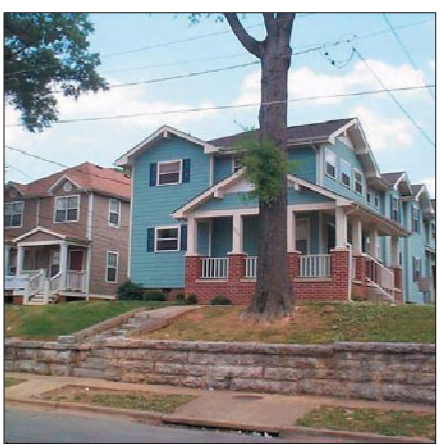


Source: 2015-2019 American Community Survey, Table DP05

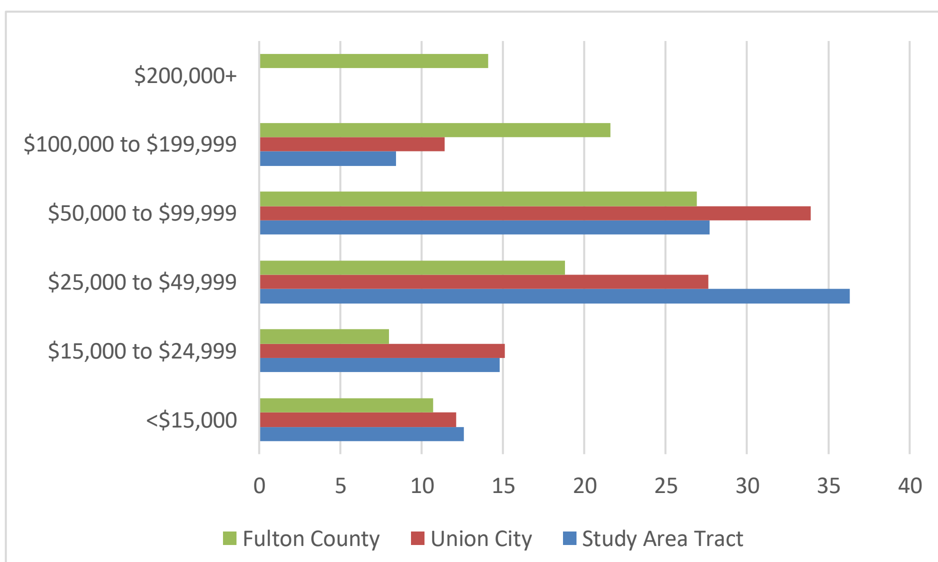
New middle class homes in a walkable community in Tennessee

Household Income Distribution

Median family income for the study area tract was estimated at $43,708 in 2019, below the City's estimate of $53,984 and Fulton County's $95,559. Over a third (36.3%) of the families in the study area tract have incomes in the $25,000 to $49,999 range, the largest distribution share.



New middle class townhomes in the same Tennessee community

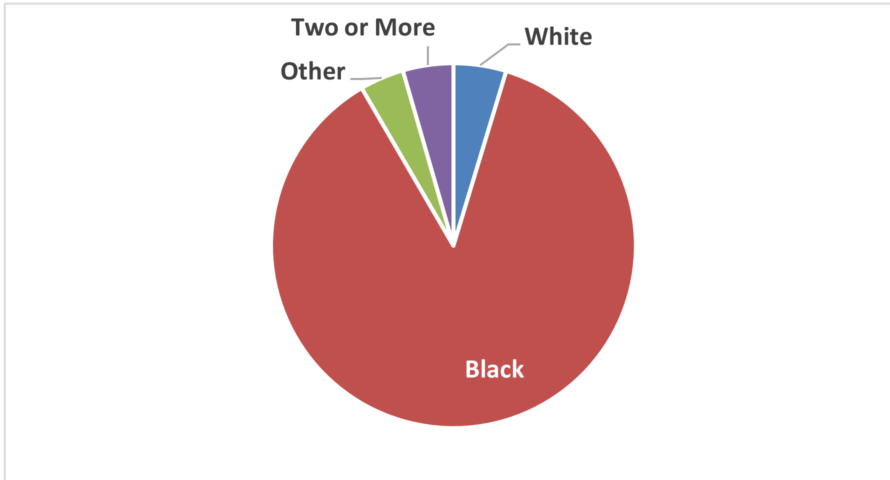


Source: 2015-2019 American Community Survey, Table DP03

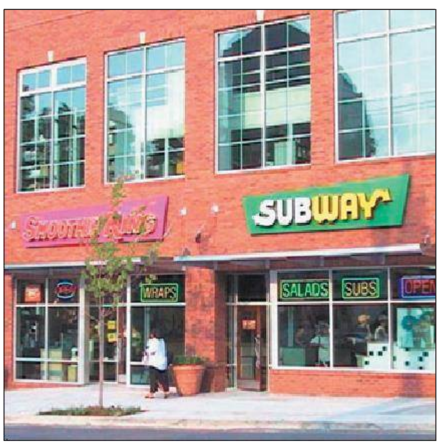
Enterprising Young Singles prefer urban multifamily housing

Racial Composition

An estimated 86.9% of the residents of the study area tract are Black, and 4.7% are white. The balance either belongs to another race or identifies as being two or more races. Hispanic and Latino residents (of any race) comprise 5% of the population.



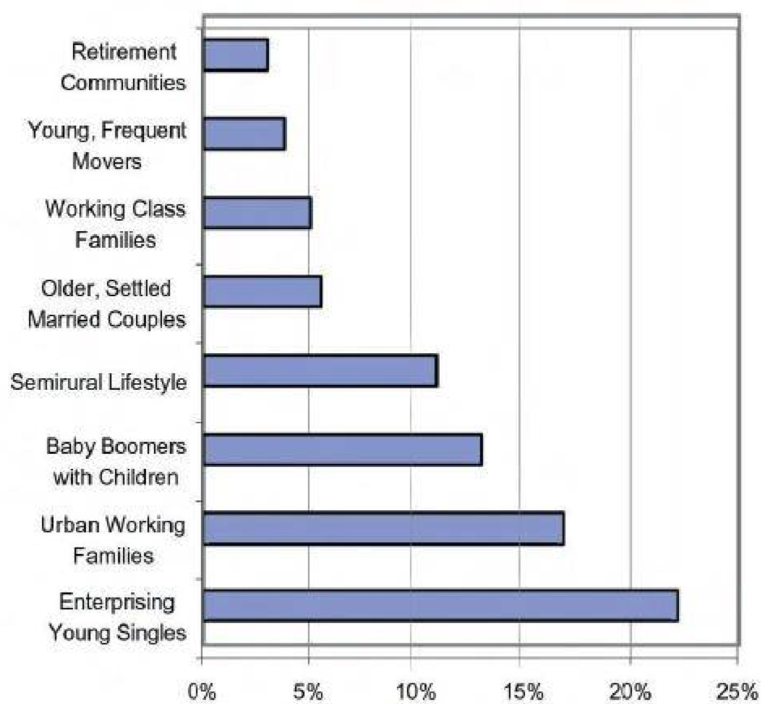
Source: 2015-2019 American Community Survey, Table DP05

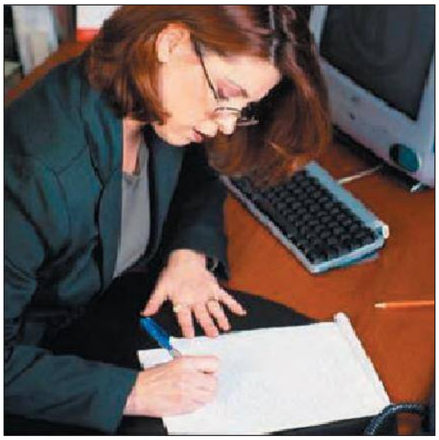


Urban Working families frequently visit fast food restaurants

Lifestyle Characteristics

Using A Classification of Residential Neighborhoods (ACORN) methodology, households within the market area have been grouped into segments bearing descriptive terms to convey a type of neighborhood or lifestyle useful for consumer marketing and planning purposes.





The Market Area is a major employment center

Employment

The study area tract represents a growing employment center within Union City and south Fulton County as well. For residents of the study area tract containing the LCI area, nearly a third work in the transportation, warehousing, and utilities or the arts, entertainment, recreation, accommodation and food services industries. Other industries with significant representation among the study area tract's workforce include retail trade; professional, scientific, administrative, and waste management services; and education, healthcare, and social services.

Industry	Study Area Tract	
	#	%
Agriculture, forestry, fishing and hunting, and mining	0	0.0%
Construction	110	3.2%
Manufacturing	298	8.8%
Wholesale trade	50	1.5%
Retail trade	432	12.7%
Transportation and warehousing, and utilities	573	16.9%
Information	50	1.5%
Finance and insurance, and real estate and rental and leasing	111	3.3%
Professional, scientific, and management, and administrative and waste management services	432	12.7%
Educational services, and health care and social assistance	398	11.7%
Arts, entertainment, and recreation, and accommodation and food services	574	16.9%
Other services, except public administration	256	7.5%
Public administration	112	3.3%

Source: 2015-2019 American Community Survey, Table DP03

1.13 RETAIL MARKETS

The Wal-Mart at Shannon Crossing Shopping Center is a major draw

Market Overview

The Atlanta retail submarket within which Union City and vicinity are located is called the "I-85 South" market by Dorey Publishing and Information Services, a local commercial real estate database company. As of spring/summer 2003, Dorey estimates the I-85 South submarket at just over 2.5 million square feet of retail space. Vacancy is reported at 18.9%, with no new centers under construction.

Seven shopping centers in the vicinity were surveyed for this study, ranging from the 30,000 sq. ft. Mission Square Center to the 765,000 sq. ft regional Shannon Mall.

At noon on a Monday, Shannon Mall's parking lot is nearly empty

The average year built of these centers is 1986. Rental rates range from $8.00 - $14.50 sq. ft. While the median occupancy rate is 98%, Shannon Mall is struggling with a 41% vacancy rate.

With the exception of Shannon Mall, tenant mix is strongly oriented towards personal service retail such as hair salons, dry cleaners and insurance agencies. Largely absent are the "big-box" power retailers (e.g. Best Buy, Office Max, Sports Authority, Target), and franchise/chain table service restaurants typically found at Mall perimeters (e.g. Olive Garden, Red Lobster, Chili's, etc.). Such a tenant mix is, however, being addressed with the new, 1.1 million sq. ft. power center, Camp Creek Marketplace, located at I-285 and Camp Creek Parkway. The Cities of Atlanta and East Point created a tax allocation district that included a bond sale for the infrastructure needed for this project.

Future development in south Atlanta could also impact the market

Center Name	Types	Location
1. Shannon Crossing Shopping Center	Neighborhood Center	Union City
2. Shannon Square	Community Shopping Center	Union City
3. Shannon Market Shopping Center	Neighborhood Center	Union City
4. Shannon Southpark Mall	Super Regional	Union City
5. Main Street South Fulton S.C.	Community Shopping Center	College Park
6. Pineview Plaza	Unanchored Strip Center	College Park
7. Mission Square	Neighborhood Center	Union City

area's retail future. The Mall at Newnan Crossing, located at I-85 and Bullsboro Drive in Newnan, is expected to open in 2004 and could present competition for Shannon Mall. Additionally, the growing popularity of open air power centers or town centers with grid systems will likely draw customers away from enclosed regional centers.

Main Street-style town centers are today's hottest retail addresses

<u>Strengths</u>

- Strong growth
- Existing destination retailers (Kroger, Wal-Mart, etc..)
- Access to I-85

<u>Weaknesses</u>

- Unbalanced tenant mix
- Concentration of personal service retailers
- Limited big box retail
- Lack of sit-down restaurants

Many retailers, such as Staples, are not represented in the area

<u>Opportunities</u>

- Repositioning of Shannon Mall
- Creation of a "town center" mixed-use concept
- Establishment of a full-service retail base
- Destination restaurants

<u>Threats</u>

- Continuing flow of retail dollars to other shopping centers such as Camp Creek Marketplace, Fayette Pavilion and, in the future, the Mall at Newnan Crossing
- Retail obsolescence

Main Street-style retail is a viable option in the Union City Town Center

Retail Market Demand

A retail demand analysis was completed to provide market support for retail uses in the retail market area and the study area. Expenditure potential by type of merchandise is applied to population figures to obtain potential sales volume for market area residents.

The study area has the potential to capture 9.0% of the total increase of potential sales in the market area in the next five years, representing a total of 85,917 square feet of retail space. Between 2008 and 2013, the study area's capture of potential demand for retail space could potentially increase to 10.5% or 115,517 square

The creation of a unique shopping destination could pull shoppers from outside of the traditional trade area

Quality restaurants are a much-needed entertainment option

feet. For the 10-year period, the total potential capture for new retail space for the study area is 201,434 square feet. The category of merchandise that shows the largest potential demand for new space is Shoppers Goods at 83,670 square feet for the 10-year period. Estimates of potential demand should be considered conservative as demand generated by persons living outside of the market area (e.g., over 8,300 employees who work within two miles of the study area and metro area residents) are not included.

Primary target markets for retail development in the study area are market area residents, employees that work at nearby businesses, metro area residents and, perhaps, Southside hotel/motel guests. Recognizing that market area residents will generate the largest share of sales at study area businesses, demographic and Lifestyle data, retail spending and purchasing activity and MarketPlace data are used to identify the types of businesses that would be most appealing to this market. Recommended businesses include: home furnishings and accessories, electronics/PCs, apparel (especially shoes, children's/infant's clothing, sportswear), sports equipment, outdoor gear, children's toys and inexpensive jewelry. The types of convenience goods and services that would appeal to residents (particularly those living within and immediately surrounding the study area) are: take-home/prepared meals, video rental, day care, drycleaner/alterations, shoe repair and exercise studio/gym. Expanded entertainment options such as one-of-a-kind restaurants (e.g., ethnic cuisine, deli, sidewalk cafes, pizza, family restaurants, dessert/coffee), bar/nightclub, live music, outdoor theater and community events would also appeal to area residents.


Newly constructed owner-occupied detached housing

1.14 RESIDENTIAL MARKETS

Housing is the building block of all communities. Communities that offer a variety of housing options for their residents tend to be those that are most stable over the long-term. These options should include both a variety of housing types and a variety of price points for these housing types.

Market Overview

As with the Demographic Profile, the data and analysis in this section uses Fulton County census tract 105.12 (the “study area tract”) as an approximation of the LCI study area. Highlights from the housing profile can be summarized as follows:

Housing Profile	Study Area Tract	Union City	Fulton County
Total Housing Units	2,973	9,345	471,836
% Owner-Occupied Housing	21.8%	33.8%	51.6%
Median Home Value	$113,400	$132,300	$313,300
% Single-Family Detached	31.3%	47.1%	47.7%

Source: 2015-2019 American Community Survey, Table DP04


Owner-occupied attached housing along Flat Shoals Road

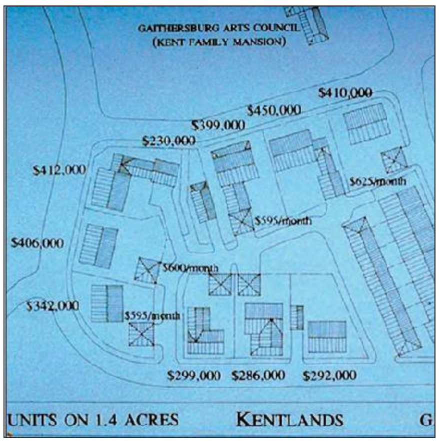
Housing development in the study area tract increased markedly beginning in the 1970s, with 1970s and 1980s-era housing each comprising more than 20% of the inventory. The largest share housing in the study area tract (34.2%, representing over 1,000 units) was constructed between 2000 and 2009, with a near complete drop-off thereafter corresponding with the timing of the Great Recession.


Rental housing

The for-sale market, as measured for Union City’s 30291 ZIP code appears centered in the $150,000 - $170,000 price range. Zillow’s Home Value Index places the average home sale price for 2020 at $156,546 with more recent sales trending toward the high $160s. This is significantly higher than the median home value estimated by the ACS but is likely more accurate because the Zillow average is based on actual sale prices rather than respondent-reported home values.

As the majority of housing in the study area tract is rental, a separate analysis of rental housing data is helpful for assessing conditions in the LCI study area. A profile highlighting rental market conditions appears on the following page.

This new subdivision contains a range of housing sizes



To ensure diversity new neighbor-hoods could be designed to include a range of price-points, such as this Maryland project

Housing should be competitively priced, but not poorly built

Rental Market Profile	Study Area Tract	Union City	Fulton County
% Renter-Occupied Housing	78.2%	66.2%	48.4%
% Low-Density Multifamily (buildings with 4 or fewer units)	17.4%	16.9%	10.9%
% Medium-Density Multifamily (buildings with 5 to 19 units)	48.2%	27.4%	18.7%
% High-Density Multifamily (buildings with 20 or more units)	1.9%	7.2%	22.0%
Median Gross Rent	$984	$967	$1,205
% of Renters with Gross Rent >30% of Income	65.4%	56.0%	48.7%

Source: 2015-2019 American Community Survey, Table DP04

More than three in four housing units within the study area tract is renter-occupied and rental units tend to be in medium-density buildings with between 5 and 19 units. The median gross rent is slightly higher than that of Union City as a whole, falling just under $1,000 per month. Relatively higher rents combined with a lower median income than the city results in significant affordability challenges for local renters. More than 65% of the renters in the study area tract have rents exceeding 30% of their incomes. The LCI area demonstrates a clear need for additional multifamily rental housing that is affordable to local residents.

Housing Goals

In various past planning efforts, Union City's residents have consistently made diverse and affordable housing types a goal for the city's future, in addition to enhancing the design, connectivity, and amenities available in existing neighborhoods. In the 2015-2020 Comprehensive Plan Update, community goals are clearly connected to policies and strategies to ensure implementation. A selection of housing-related goals and their associated policies is provided here.

Goal: Create New, Complete Neighborhoods - Encourage walkability, connectivity, housing choice, and public green space to be elements of new residential development. Neighborhoods with these qualities require appropriate maintenance and infrastructure enhancements, while growing areas on the periphery require master planning and attention to detail to ensure that the developments will add enduring value to the City. Three policies are outlined in the plan to help the City achieve this goal. Those policies are:

Residents expressed a support for these urban-style apartments at the first community workshop

- Create walkable, well-connected neighborhoods. Provide a network of sidewalks, paths and trails in new development to create a healthy community.
- Encourage housing diversity in new neighborhoods. Promote a variety housing types to provide housing choices and price points for all ages and income levels in the community.
- Connect new neighborhoods with existing and future development. Encourage new neighborhoods to connect to existing neighborhoods with streets, sidewalks and paths and create connection opportunities to future development if surrounding area is undeveloped to improve mobility and access to other destinations in the community.

Goal: Create a Variety of Quality Housing Options - Promote a variety of housing choices in Union City – making it possible for all who work in the community to also live in the community. Policies to enact this goal are listed as:

- Plan for a variety of housing types, styles and price points as new development occurs. Maintain residential balance so the community can continue to provide workforce housing in addition to housing at higher price points.
- Provide quality and affordable housing choices. Ensure that all residents have access to quality affordable housing options, make “aging in place” a viable option for residents and ensuring those who work in the city have homes available in their price range enabling them to live and work in Union City.

Goal: Enhance and Maintain Character of Existing Neighborhoods – Ensure that redevelopment and residential infill in existing neighborhoods enhances the existing character, promotes quality design, encourages efficient reuse of underdeveloped land, stabilizes and enhances established neighborhoods, and helps revitalize economically distressed neighborhoods. The policy put in place to implement this housing goal is:

- Make visual improvements to homes and encourage the maintenance of property.

The goals and policies are highly responsive to the present housing needs and conditions in the LCI area and the City in general. Given Union City’s relatively lower incomes and affordability challenges, the emphasis on diverse and affordable housing types is warranted. With a development approach that, until recent decades, has been auto-centric, specific planning for enhanced walkability and connectedness within and between neighborhoods recognizes an important community priority.

Section 2: Visioning

2.1 PUBLIC PROCESS

The public participation process consisted of an intense three-month period of monthly Task Force Meetings, two Community Workshops and one-on-one interviews with stakeholders running from September through November of 2003.

Task Force

At the beginning of the planning process a Task Force was identified to guide the process and serve as liaisons to the greater Union City community. In order to best represent constituencies in the Study Area, the Task Force was crafted to include residents, businesses, property owners and elected official. A special effort was made to include residents from single-family homes, townhomes, and condominiums, as well as residents of market-rate and Section 8 apartments. However, because of situations beyond the control of this study, the participation of residents on the Task Force was limited.

The final Task Force included:

- Commercial property owners
- City officials
- The South Fulton Chamber of Commerce
- Small business owners
- Single-family homeowners
- Condominium and townhome owners
- Local advocacy groups

The Task Force met four times during the planning process, including September 23, October 7, October 28, and November 18. These meetings were utilized to gain input into strengths, weakness, opportunities and threats within the Study Area, promote community outreach efforts, and review and refine the vision developed during the workshop.

Interviews

In addition to Task Force meetings, one-on-one interviews were utilized to better understand existing conditions and obtain a general direction for the area’s future. Interviews were conducted in-person and over-the-phone with a variety of constituencies, including:

- Residents
- City officials

- Small business owners
- Potential Investors
- Commercial property owners
- Developers
- MARTA
- Real Estate Agents

Community Workshops

The primary tool for achieving public participation were Community Workshops held on September 23 and October 7. Each Community Workshop was preceded by a printed advertisement delivered via post and e-mail.

The September 23 Visioning Workshop focused on developing a general vision and character for the Study Area. It include a review of existing conditions, an image preference survey, and a brainstorming session to identify an overall future character. Nearly 20 stakeholders participated in this process.

The October 7 Plan Workshop focussed on translating the vision established at the first meeting into a plan. Nearly 30 stakeholders worked with the consultant team and Task Force members to create a plan that included the following components:

- Residential Land Uses
- Parks and Open Space
- Civic Facilities
- Pedestrian Improvements
- Vehicular Transportation Improvements
- Transit Improvements
- Retail Mix
- Urban Design

Following the second workshop, the consultant team synthesized results into the Concept Plan. The Concept Plan was presented to and endorsed by the community on November 18, 2003.

2.2. IMAGE PREFERENCE SURVEY

At the September 23, 2003, Visioning Workshop participants were shown a series of images of different building and community forms from around the world, including Union City, and given green and red dots. They were then asked to place a red dot next to the images in each category that they though where most inappropriate for the future Study Area, and a green dot not to the most appropriate images. If no images were appropriate or inappropriate, participants could elect to not place a dot next to any images in a given category.

Following the survey, the most and least appropriate images were identified and a discussion ensued as to why images were scored as they were. The following is a summary of these comments.

Survey Results

Single Family Residential

Least appropriate

Most appropriate

Single-family homes will continue to play an important role in the Study Area, but current trends of poorly built homes must change in favor of quality housing that is built to last. The least appropriate single-family home was one located in a new subdivision on McGillicutty Way. The home in question scored low because it was architecturally dull and because its most prominent feature was the large garage at the front of it. Additionally, many workshop participants viewed it and other recent homes as likely to lose value fast due to poor construction.

The highest ranking image was a traditionally-styled new bungalow in a traditional neighborhood development in North Carolina. The home was selected because of its prominent front porch, landscaping, human scale, quality materials and traditional styling.

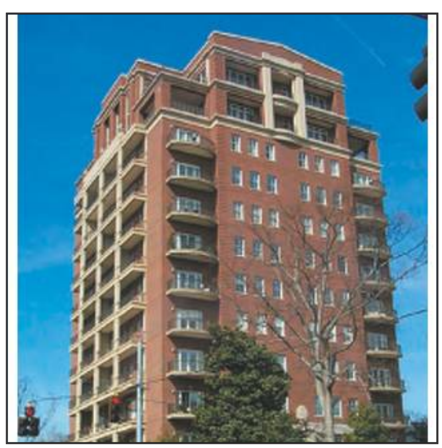
Townhomes

Least appropriate *Most appropriate*

Townhomes are a popular housing type now and in the future. However, like single-family homes, their quality must improve and they must be better integrated into the community. The least appropriate townhomes were new traditionally-style townhomes in Chattanooga, Tennessee. Although participants like the architecture, the lack of trees and their separation from the street caused many to label them as “inappropriate.” Additionally, the poorly-maintained street created an unfavorable impression.

The best-scoring townhomes were architecturally similar to the worst-scoring ones. Both were arts and crafts-style wooden structures, even though the survey included many brick ones. The reason for the differences, according to participants, was that the best-scoring townhomes looked like single-family homes and included a pleasant streetscape. Another reason included quality sidewalks and trees.

Multifamily Housing



Least appropriate *Most appropriate*

The Study Area contains a good deal of multifamily housing. The images selected by workshop participants suggest that the character of this housing is not in-keeping with their vision for the Union City Town Center. The least appropriate multifamily housing image was a brick and stone mid-rise condominium on Peachtree Street in Atlanta. Participants viewed the building's height as inappropriate for the area, although they did like the materials. This again suggested a desire for traditional building forms and materials, but in a decidedly "small town" context.

The most appropriate multifamily residential image was Post Riverside in Atlanta. Post Riverside is a series of four story, urban-style apartments surrounding a common town square. The buildings are traditionally-styled and primarily residential, although they do include small neighborhood-commercial uses. Workshop participants liked the way in which the buildings created a pleasant streetscape and intimate small town feel.

Shopping

Least appropriate

Most appropriate

The Union City Town Center area is an important retail center for south Fulton County, but workshop participants support the creation of a cohesive, pedestrian-oriented and landscaped shopping district, rather than a collection of independent strip centers. The least appropriate image selected was an Eckerd in Alpharetta, Georgia. Although the image showed a clean, new and landscaped business, participants objected to its banality, frontal-parking, and inward focus.

The best-scoring shopping image was of a two-story retail building in a "Main Street" setting with wide sidewalks, street trees and pedestrian-scaled architecture. Participants expressed a support for the image's small-town scale, as well as the attention to detail evident in the architecture.

Town Center Buildings

Least appropriate

Most appropriate

Interviews conducted prior to the workshop suggested a strong-desire to transform the Shannon Mall area into a “town center,” complete with mixed-use buildings and street-level retail. Upon being shown a series of buildings typical of downtowns, workshop participants selected a five story mixed-use building with a ground oor Kroger as the least appropriate town center building type. For most participants, the building was “too urban” for Union City. Additionally, many did not the building’s “cheap” appearance - something that can likely be attributed to its fake stucco (EIFS) facade material.

The most appropriate buildings were a row of two-story mixed-use buildings in Duluth, Georgia. Their traditional architecture, low-scale, and small retail made them highly appropriate for Union City.

Parks and Open Space

Least appropriate

Most appropriate

The Study Area currently lacks significant parks and open spaces, but workshop participants would like that to change by increasing quality green spaces. The least appropriate image was a wide, tree-filled sidewalk in Athens, Georgia. Workshop participants expressed a desire that any parks or open spaces built in the Study Area be green and large enough to identify as a unique space. They did not oppose wide sidewalks and street trees, but rather thought that additional open spaces should be provided.

The most appropriate park and open space image was from the same project as the highest-scoring Town Center Building Image. The town green in Duluth, Georgia, is a small community space fronted by buildings and featuring a fountain. It serves as a focal point for its immediate surroundings and the greater Duluth area. Participants liked its trees and fountains, but they also that liked it looked like a community centerpiece.

<u>Neighborhood Streets</u>

Least appropriate

Most appropriate

As new development occurs in the Study Area, new neighborhood streets will be built. Image preference survey results suggest that the current way of building new streets must change. The least appropriate new street image was one taken in new development on Oakley Road within the Study Area. This street is wide, lacks a streetscape and appears barren. Workshop participants did not like said street for these reasons, but also because they thought it indicative of low-quality and rapidly-built development.

In contrast, the most appropriate neighborhood street was a single-family residential street in the I'On community, near Charleston, SC. Participants liked the street because it had street trees, sidewalks and an intimate scale. The street appears to be built for the sake of enriching the community, and not just moving cars.

Major Streets

Least appropriate

Most appropriate

Because of its role in the regional and state highway system, the Study Area will need to include major streets. However, survey results suggest that these streets need to traverse the Study Area on Union City's terms. The least appropriate major street image was of an Interstate Highway, for obvious reason.

The most appropriate image was of the Konrad Adenaeur Ufer in Cologne Germany. This is a major four lane roadway with a center median and street trees. It serves as a regional corridor, but without degrading the surrounding community. Workshop participants liked the street trees and median very much. Both lend a sense of elegance to what would otherwise be an uninteresting road.

General Findings

The images selected as most appropriate for the Union City Town Center represent places from around the world. Regardless of origin, all share several things in common. Most notable is that they all represent a small-town environment; workshop participants rejected images of both center cities and suburban areas equally. Furthermore, all images share a common respect for the pedestrian and include ample landscaping and human-scaled traditional architecture.

These findings suggest that the residents, businesses and property owners of Union City are yearning for a place that they can identify with as their community's center. Unlike many other small towns in the Atlanta region, Union City never had a significant downtown area. There is no courthouse square, town green, or row of historic commercial blocks. There is currently no place that represents the heart and soul of Union City, but the opportunity exists to create such a place in the Union City Town Center.

2.3 VISION

The vision for the Town Center is of a socially diverse and progressive center for Union City. With its many trees, wide sidewalks and safe and low-speed streets, the Town Center should encourage walking and MARTA bus use, while ensuring that automobile traffic moves in a safe and efficient manner. Parks and open spaces should be provided throughout, and natural resources protected, particularly the areas along both sides of Windham Creek.

The Town Center should include a variety of uses, with mixed use and higher-intensity buildings focussed around Shannon Mall, transitioning to less intense uses as the distance from the mall increases. Small neighborhood commercial areas should serve as centers for neighborhoods further from the mall, including the traditional downtown, Flat Shoals Road and Shannon Parkway, and Flat Shoals and Oakley Roads. Single-family and multifamily areas should remain, but should be reconnected to the greater Town Center area through the addition of new single-family, townhomes, and live-work areas. The streets in all areas should connect.

In its current commercial areas, the Town Center should provide a variety of uses to serve the needs of Union City and the greater south Fulton area. In addition to practical, but auto-oriented big box retail uses, the area should include unique pedestrian-scale sidewalk-oriented retail uses along a “Main Street” setting. These should include quality restaurants and unique shops that contribute to a trendy, hip and fun destination for both residents and visitors alike.

All buildings in the Town Center should appear inviting towards the street. The desire to create an inclusive and diverse environment requires that buildings front the street with dignity. Landscaping should be provided, as well as entrances that open onto newly built wide sidewalks.

2.4 COMMUNITY GOALS

During the Plan Workshop, participants were divided up into various groups and given a base map of the Study Area. They were then asked to discuss general ideas and use different pieces of tracing paper to create goals and concepts for desired land-uses, streetscape improvements, transit improvements, etc. Each group operated independent of each other, to ensure that ideas were unique.

Following the workshop, these pieces of tracing paper and comments synthesized to identify common themes. The following is a summary of these.

Overall Structure

Organize the Town Center Area into a series of neighborhoods organized around retail, civic buildings or open space.

Because of the scale of the Study Area, workshop participants recognized that it was much too large to be conceived of as one distinct neighborhood. Therefore, the should be divided into a series of neighborhoods. Each neighborhood should be based on a one-quarter to one-half mile walk from an existing or potential center. Each neighborhood should be divided from the other by open space or single-family residential uses, to the maximum extent possible.

Street Patterns

Provide an interconnected street system supporting a range of route options, transportation modes, reduced congestion on major arterials and future development.

Workshop participants expressed a strong desire to increase the number of north-south and east west streets in the Study Area. Workshop participants also expressed a strong desire that all new streets be walkable and narrow, with wide sidewalks and no more than two lanes, plus parking.

Architecture & Building Placement

Create a sense-of-place through quality architecture that is appropriate for and unique to the Town Center.

Workshop participants believed that buildings should re ect high design standards. Commercial buildings should not be based on a corporate prototype, but rather, their context. Residential structures should be built to last.

Buildings should orient themselves towards the street through the use of small setbacks, rear and side parking and front doors accessible off the street. Buildings should lend dignity to the public realm and not exist as isolated objects.

Pedestrian Systems

Ensure that walking within the Town Center is safe, convenient and enjoyable.

Workshop participants believed that a well-connected system of sidewalks and multi-use trails should provide easy access throughout the Study Area. Sidewalks should be provided on all streets and should include trees to shade pedestrians and buffer them from moving traffic. Curb ramps must be provided for the disabled.

Bicycle Systems

Increase the viability of bicycling within the Study Area.

There is a strong desire for improved bicycle facilities in the Study Area. Bicycling should be safe and convenient to both increase recreational bicycling and make it a viable alternative for short-distance trips.

Vehicular Systems

Provide well-maintained roads that facilitates the smooth ow of traffic on the community's terms.

Workshop participants are supportive of improving vehicular facilities through the provision of alternative routes (see Street Network above), but they also advocate improving the operations of existing streets through other means.

Parking

Provide unobtrusive parking that is convenient, but not excessive.

Workshop participants expressed a dissatisfaction with the high number of surface parking lots lining area streets, particularly in commercial areas. There was a strong desire to reconsider the treatment of parking within the Study Area so that its provision and placement are more palatable to the community.

Transit Systems

Increase the use and convenience of MARTA buses.

Workshop participants expressed a strong desire to improve the viability of MARTA buses as a transportation choice within the Study Area. Central to this was improving existing facilities to make MARTA bus use more convenient.

Natural Systems

Preserve and protect existing natural systems, while enhancing the quality of life within the Study Area.

Windham Creek and its oodplain zone are the most important natural systems in the Study Area according to workshop participants. The creek, oodplain zone and adjacent woodlands should be protected and turned into a community asset.

Public Realm

Create a dignified public realm that encourages human interaction and promotes civic identity.

Workshop participants want a public realm that is dignified and quality. For far too long developers have focussed on their own properties, while turning their back on the public realm. Additionally, the Study Area has been largely neglected in planning for parks and open spaces; this must change in the future.

Land Uses

Provide a mix of land uses within close proximity, while protecting existing residential areas.

Workshop participants expressed a desire for a range of land uses within the Town Center. The highest intensity uses should occur near Shannon Mall, with lower-intensity uses occurring farther away.

Shannon Mall

Promote the long-term revitalization of Shannon Mall as a vibrant centerpiece of the Town Center area.

Shannon Mall is, and will continue to be, the economic and community heart of the Town Center Area. Over time, workshop participants would like to see Shannon Mall continue to play a key role in the Study Area. While the mall may not redeveloped for many years, it, like all modern buildings, will eventually reach obsolescence.

At such time, it should be redeveloped into a pedestrian-oriented environment appropriate for an urban town center. This should include parks, plazas, tree-lined streets, wide sidewalks and a mix of retail, residents, civic and office uses.

The Concept Plan transforms the Town Center into a walkable small town.

2.5 CONCEPT PLAN

The Union City Town Center represents an auto-oriented, pedestrian-hostile collection of uses and buildings organized with little regard for other uses or the surrounding community. The area was developed in a manner typical of most American suburban development in its assumption that all access would be by car.

Today, the implications of this outdated community pattern are great. Pedestrians cannot safely and conveniently access nearby uses, traffic is forced onto one or two main streets, buildings are spread apart and fail to create a sense of place, and the public realm is grossly neglected by buildings that turn their back on anything other than their parking lots.

As the area ages both physically and demographically, and real estate trends region wide focus more on walkable, mixed-use communities the failure of the Union City Town Center to break away from this outdated model and emerge as a true community represents the greatest threat to the area's long-term vitality.

The long-term economic and social vitality of the Union City Town Center requires a reconceptualization of the area from a collection of single, disconnected uses, to a cohesive, mixed-use and mixed-income walkable community based on the time-honored principles of good community design. The Concept Plan represents just such a reconceptualization, and includes recommendations necessary to achieve it. Central to the Concept Plan is the Concept Plan Map, which represents a "master plan" for the area, suggesting how the community's vision could be achieved in a way that respects the community's vision for itself, sound urban design policies, and market realities.

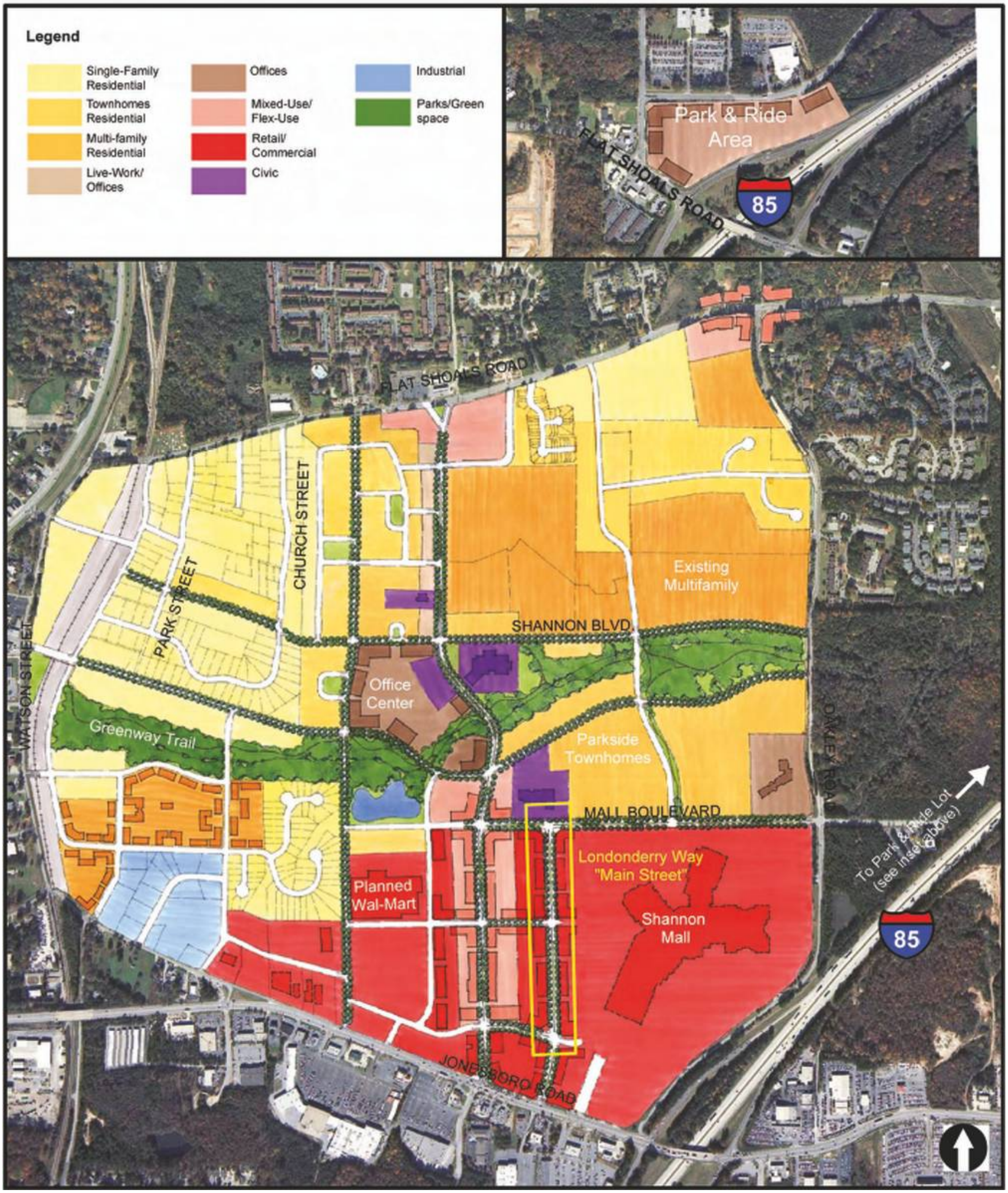
The following pages contain details of the Concept Plan, including specific projects, programs and policies necessary to make it a reality. Components of the Concept Plan are divided into functional categories for ease in understanding. Section 3: Implementation includes specific details on the programs, projects and policies defined herein.

Neighborhood Structure

The key to creating a vibrant Town Center is recognizing that the area is too large, from a pedestrian point-of-view, to operate as a single neighborhood. Most people will not walk more than one-quarter mile to access goods and services. Therefore, the quarter-mile radius becomes a key component of the future Town Center.

The Concept Plan recognizes opportunities to create five walkable

CONCEPT PLAN MAP



neighborhoods in the Study Area. These include:

- **Shannon Town Center,** a medium-to-high-density, mixed-use neighborhood surrounding Shannon Mall that will serve as the center for the City of Union City, while providing new housing options for its residents.
- **Oakley Corners,** a medium-density residential neighborhood surrounding the intersection of Oakley and Flat Shoals Roads.
- **Flat Shoals Corners,** a medium-density mixed-use neighborhood surrounding the intersection of Shannon Parkway and Flat Shoals Road.
- **Oak Village,** a medium-density, primarily residential neighborhood along Alexander Street which includes live-work uses responding to its proximity to existing and future industrial uses.
- **Downtown,** a neighborhood intended to protect and revitalize the primarily single-family residential neighborhood surrounding the historic downtown.

Each neighborhood is divided from the other by open space, single-family residential uses, or other uses that draw from a larger area that the immediate neighborhood.

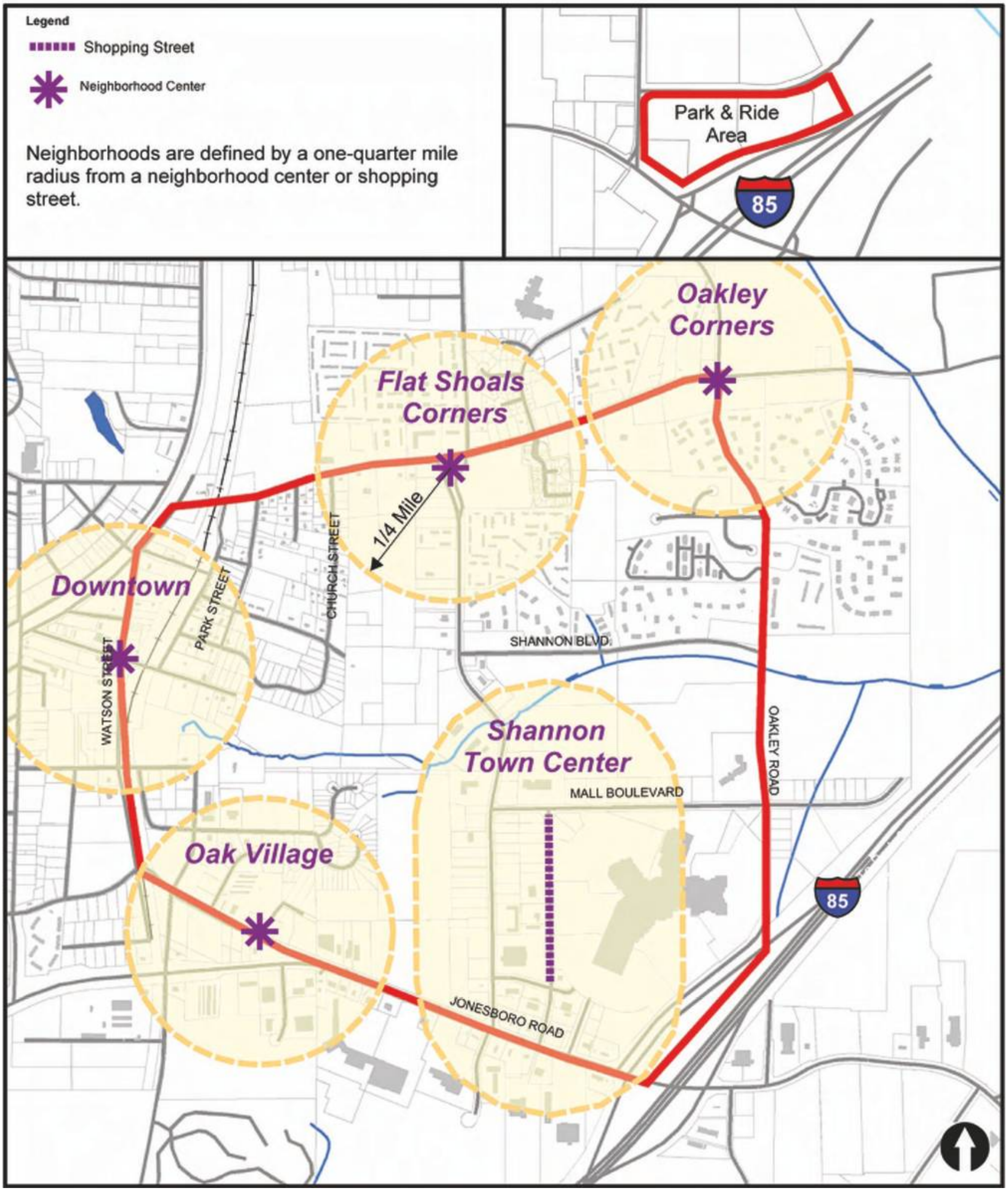
Street Patterns

The Concept Plan creates an interconnected street network by proposing a variety of new north-south and east-west streets. Because the current system includes significant deficiencies that should be addressed in the short-term, these new streets are organized into high and Low priorities.

High Priority new streets include:

- A 2,800 feet long east-west extension of Union Street to Shannon Parkway. This is the highest priority street in the Study Area.
- A 2,900 feet long east-west new street or parkway running from Shannon Parkway to Oakley Road.
- A 2,500 feet long north-south new street running from the proposed Union Street extension to Jonesboro Road, passing just west of the planned Wal-Mart.
- A 2,650 feet long north-south new street running from Flat Shoals Road the proposed Union Street extension.
- A 1,150 feet long east-west extension of Main Street to Shannon Parkway.

NEIGHBORHOOD STRUCTURE



- A 1,100 feet long east-west extension of Mall Boulevard to the proposed north-south street just west of the planned Wal-Mart.
- A 1,700 feet long east-west new street running from Londonderry Way to the proposed north-south street just west of the planned Wal-Mart.
- A 2,150 feet long north-south new street running from the proposed extension of Union Street to just east of the planned Wal-Mart.
- A 1,200 feet long east-west new street connecting the proposed north-south streets on the planned Wal-Mart property to Shannon Parkway.

Low Priority new streets include:

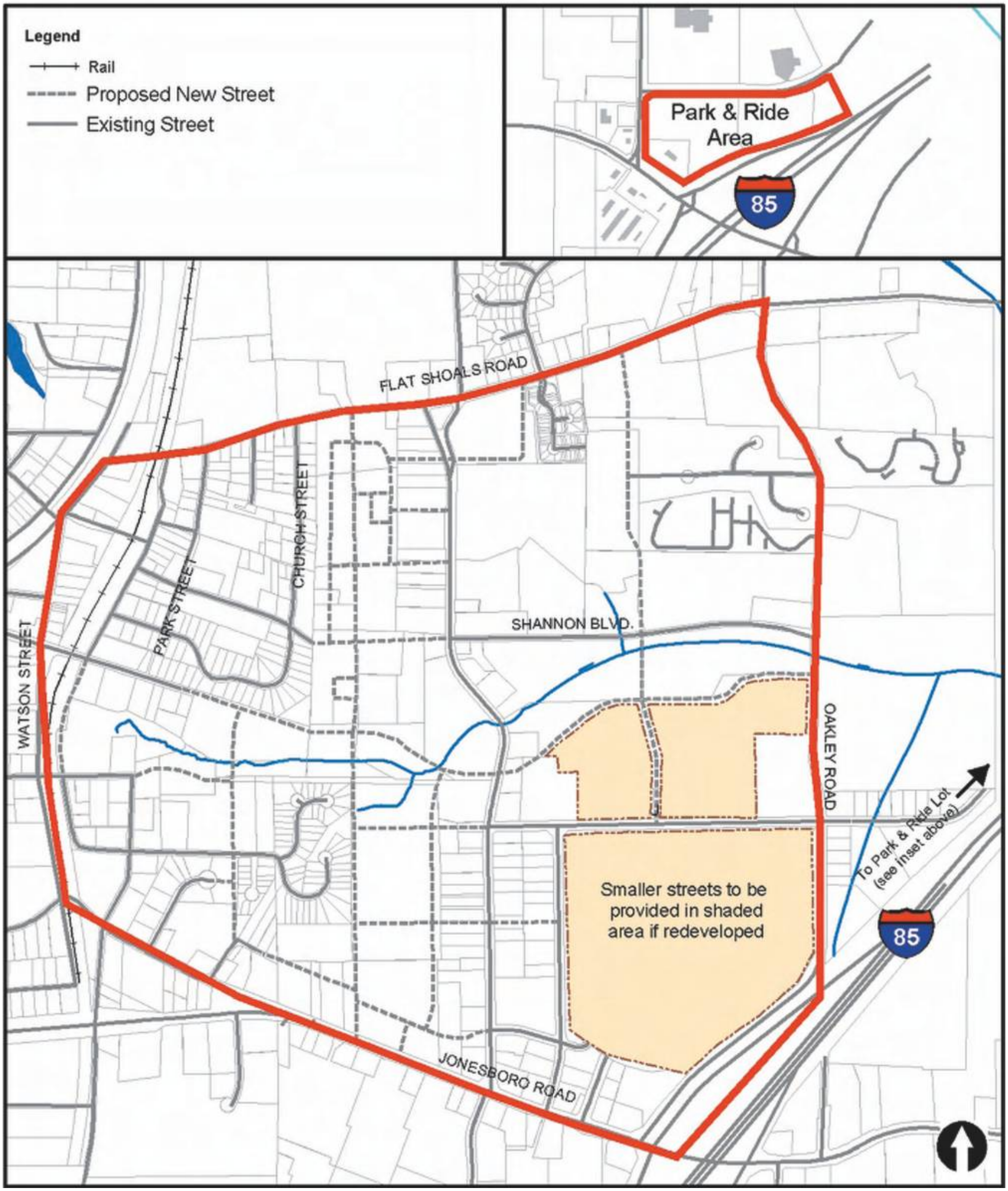
- An 850 feet long extension of Oak Street to the proposed north-south street just west of the planned Wal-Mart. The goal of this street is to create an access street that allows for reducing curb cuts on Jonesboro Road.
- A 4,000 feet long north-south street connecting Flat Shoals Road and Mall Boulevard, between Shannon Parkway and Oakley Road. This street should run mid-parcel between existing and planned multifamily developments and can be achieved without the demolition of any existing structures.
- A 1,000 feet long extension of Goodson Street south along the rail line to Alexander Street.
- A 1,900 feet long north-south street between the extension of Union Street and Oak Street.
- A 220 feet long extension of Great West Industrial Park Drive to the proposed street running from Oak Street to the proposed Union Street extension.
- An 850 feet long east-west street running from Baker Street to the proposed street running from Oak Street to the proposed Union Street extension.
- Various new streets in the Flat Shoals Corners neighborhood.

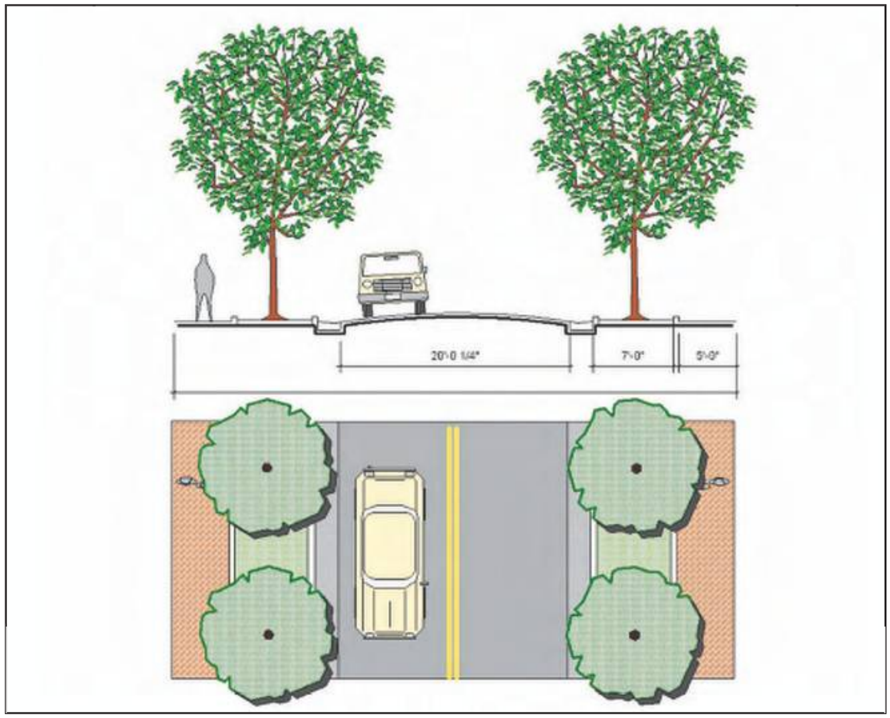
In addition to these new streets, the City of Union City must institute changes in its city code to support future connectivity as new development occurs.

Policies regarding new streets include:

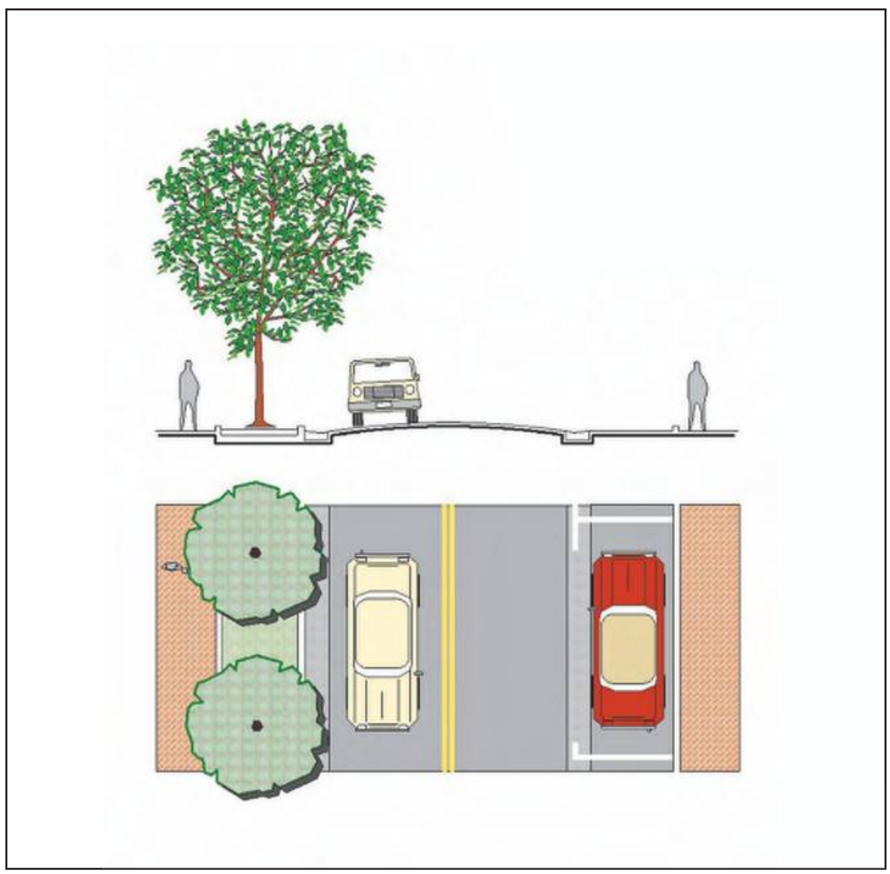
- Requiring that all new developments within the Study Area construct the above-referenced streets or portion thereof when such are shown on their development site.

PROPOSED STREET NETWORK

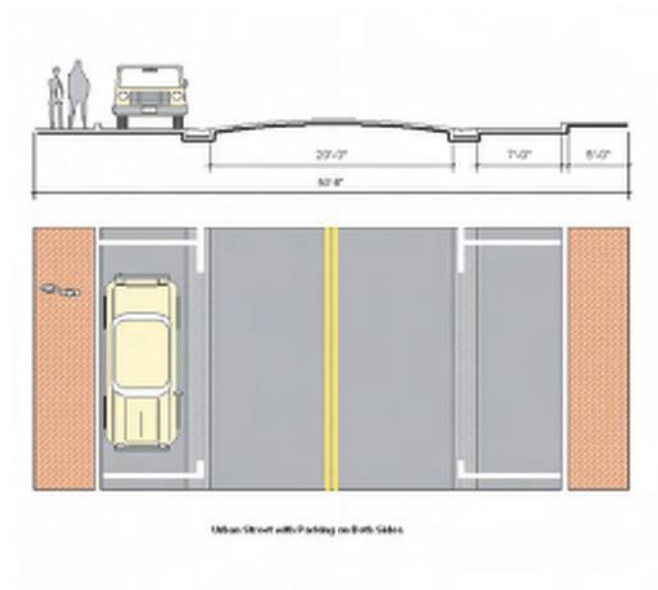




Proposed section for 20 foot wide street with no on-street parking.



Proposed section for 28 foot wide street with a 7 foot wide on-street parking lane on one-side.



Proposed section for 20 foot wide street with two 7 foot wide on-street parking lanes. Please note street trees are not shown but must be provided.

- Prohibiting cul-de-sacs and other permanent dead-end streets.
- Prohibiting gating of streets or private drives.
- Encouraging new large developments to include provisions for current or future connectivity to adjacent parcels, regardless of whether such parcels are developed.
- Ensuring that new streets are built within the Shannon Mall site, should future redevelopment occur.
- Prohibiting new streets exceeding two travel lanes in width.
- Limiting new block lengths to a maximum of 800 feet, but an average of between 400 and 600 feet within a development or subdivision.
- Requiring that surface parking lots be subject to maximum block size requirements and that new streets through them, whether public or private, be treated with sidewalks, streets trees and all the usual requirements of public streets.

Please see Section III: Implementation for funding sources and proposed time lines.

Street trees shade pedestrians, buffer them from traffic and create a pleasant streetscape.

Architecture & Building Placement

The Concept Plan calls for buildings within the Union City Town Center to orient themselves towards the street in the manner of traditional cities and towns the world-over. This is particularly true for areas within the identified neighborhoods.

Please see Section III: Implementation for detailed Urban Design guidelines.

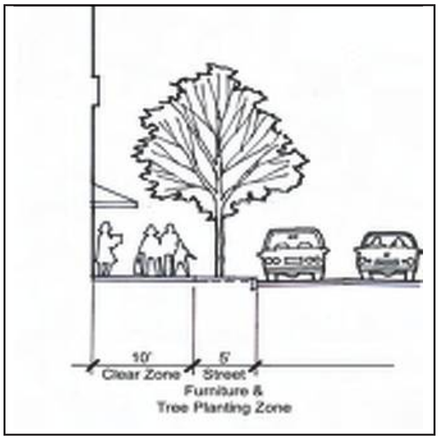
Pedestrian Systems

The Concept Plan improves pedestrian systems by expanding existing facilities and building new ones. In addition, its focus on creating pedestrian-oriented buildings promotes walking by making it safer and more pleasant. The Plan calls for sidewalks to be constructed within the City right-of-way in the short term. These sidewalks should be paid for by public funds, and should be, with the exception of new streets, modest. These include:

- Sidewalks on both sides of new streets with a minimum total width of 12 feet, including a 7 foot wide planted Street Furniture and Tree Planting Zone adjacent to the curb, and a 5 foot wide Sidewalk Clear Zone.
- Sidewalks on existing streets (except where identified below), in lieu of redevelopment, to have a minimum total width of six feet, including a minimum 1 foot wide unplanted Street Furniture and Tree Planting Zone adjacent to the curb and a 5 foot wide Sidewalk Clear Zone.
- Sidewalks on Londonderry Way, Mall Boulevard and Shannon Parkway, in lieu of redevelopment, to have a minimum total width of ten feet, including a minimum 5 foot wide planted Street Furniture and Tree Planting Zone adjacent to the curb and a 5 foot wide Sidewalk Clear Zone.

Projects on existing streets include:

- 5,500 linear feet of new sidewalk along the south side of Flat Shoals Road from Watson Street to Oakley Road.
- 5,300 linear feet of new sidewalk along the south side of Flat Shoals Road Oakley Road to I-85.
- 2,700 linear feet of new sidewalk on the north side of Mall Boulevard for its length.
- 2,800 linear feet of new sidewalk on the north side of Shannon Boulevard for its length.
- 1,500 linear feet of new sidewalk on the south side of Shannon Boulevard where it is missing.



Sidewalks adjacent to new commercial, industrial or mixed-use buildings shall have a total width of 15 feet.

- 5,700 linear feet of new sidewalk on the west side of Shannon Parkway for its length.
- 2,250 linear feet of new sidewalk on the east side of Londonderry Way for its length.
- 1,300 linear feet of new sidewalk along one side of Feldwood Road and Royal South Parkway, to connect to the proposed Flat Shoals Road sidewalks.
- Various new sidewalks on other existing neighborhood streets.
- Striped ‘piano bar” or brick crosswalks at all intersections with sidewalks.
- 7,000 linear feet of multi-use greenway trail running from Watson Street to Oakley Road.

Over the long-term, as new development occurs, public sidewalks should be augmented with wider sidewalks located on private property. This is similar to the approach taken in Midtown and Downtown Atlanta, where private developers are required to expand the sidewalks adjacent to their property at such time as they build a new building. The width of privately funded sidewalks should be largely determined by the adjacent land uses, as defined below:

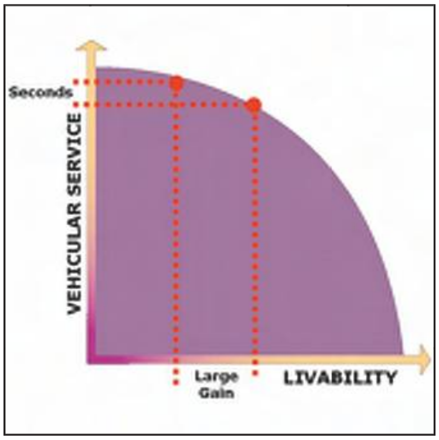
- Sidewalks adjacent to new commercial or mixed-uses should have a minimum total width of 15 feet, including a 5 foot wide planted Street Furniture and Tree Planting Zone adjacent to the curb, and a 10 foot wide Sidewalk Clear Zone.
- Sidewalks adjacent to new residential uses should have a minimum total width of 12 feet, including a 7 foot wide planted Street Furniture and Tree Planting Zone adjacent to the curb, and a 5 foot wide Sidewalk Clear Zone.

All planted Street Furniture and Tree Planting zones should include trees spaced an average of 50 feet on-center.

Bicycle Systems

The primary mechanism for improving bicycling facility is providing a network of slow-speed, bicycle-friendly street. Because bicycles can operate in the ow of traffic on streets with speeds under 25 mph, dedicated bicycle lanes are not necessary.

The Concept Plan also promotes bicycle through the creation of the a Windham Creek greenway trail, and by encouraging the City of Union City to require bicycle parking as part of new development.



The Concept Plan proposes a slight decrease in vehicular service (speed) in order to achieve greater livability.

Vehicular Systems

The Concept Plan envisions a livable community in which transportation among the different neighborhoods can be accomplished via walking, biking, transit, or personal automobile. Use of modes other than the personal auto will be equally balanced within the community, with all roadways supporting alternative modes through a livable design. Often, great increases in livability can be achieved with small penalties in overall vehicular service of a facility, as illustrated in the graphic at left.

Network and connectivity is a key component of the plan, utilizing such facilities as network-building by connecting existing segments of discontinuous streets, constructing new streets, and providing parallel network to Jonesboro Road through driveway consolidation and inter-parcel access. By creating new and connecting existing network, alternative routes are created that allow the traveler to use many alternative routes to reach their destination. As a result, the area can be served by multiple small (and livable) roads, rather than be hostage to one or two pedestrian-hostile arterials.

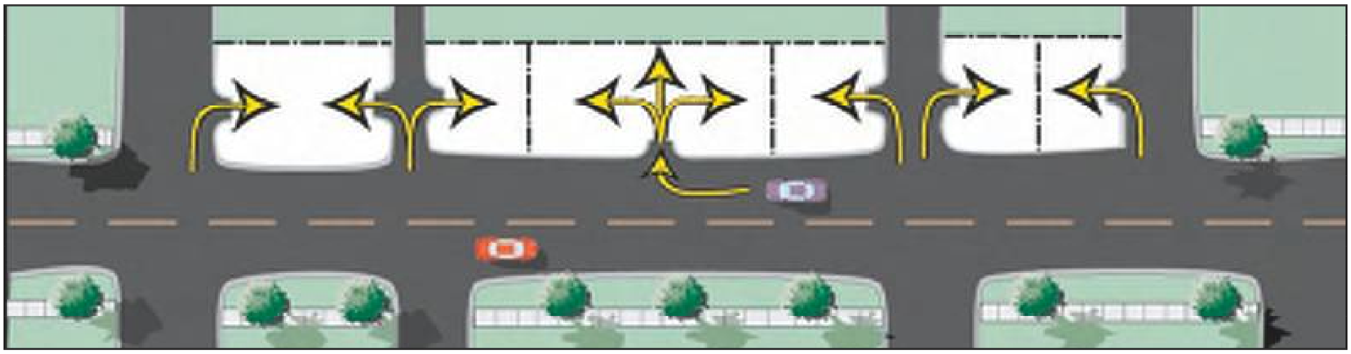
All new facilities are designed to support and balance the different modes of travel. Specific principles used are as follows:

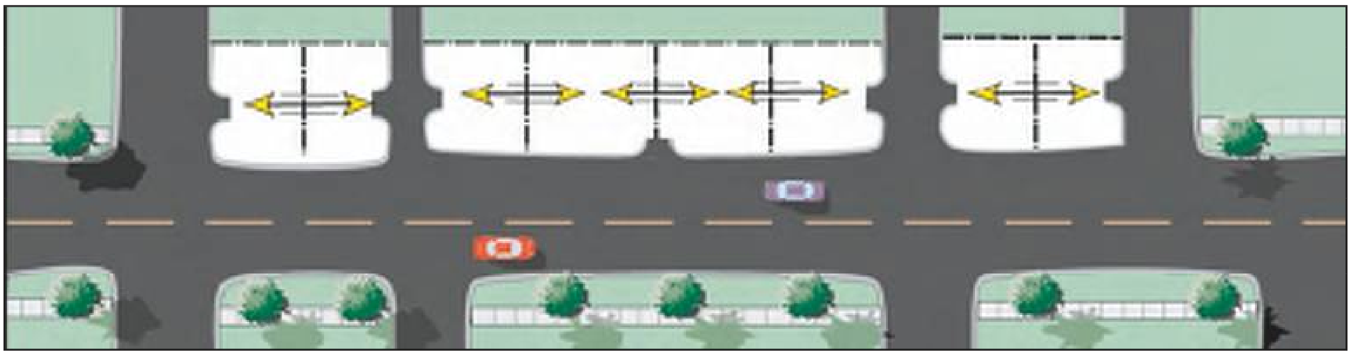
- Provide alternative local travel routes through network connections, new network segments and inter-parcel access.
- Employ cross-sections that balance personal vehicle travel with the need for pedestrian and bicycle-friendly facilities.
- Bring transit service into the Town Center
- Utilize natural greenways as pedestrian and bicycle corridors as well as public amenities.

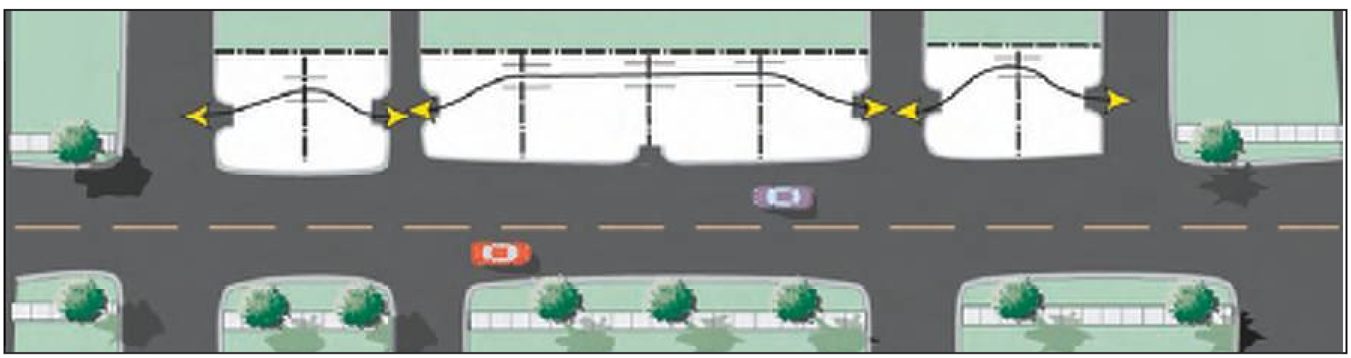
From these principles, the following recommendations are made.

- **Tame Hostile Roads**

  The north and south boundaries of the Study Area are Flat Shoals Road and Jonesboro Road. Jonesboro Road currently functions as a car-carrying conduit, with few pedestrians, bicycles or transit amenities. Flat Shoals Road, while not yet in the same condition of Jonesboro Road, has all of the ingredients in place to become a hostile facility. Through this plan, there is an opportunity to tame these facilities so that they can serve the vehicular demand that is there while becoming more amenable to other modes of travel. Initiatives to accomplish this are pedestrianization of the hostile intersections and consolidation of access cuts. These methods are on the next page and page 2.26.


Reduced curb cuts through shared driveways

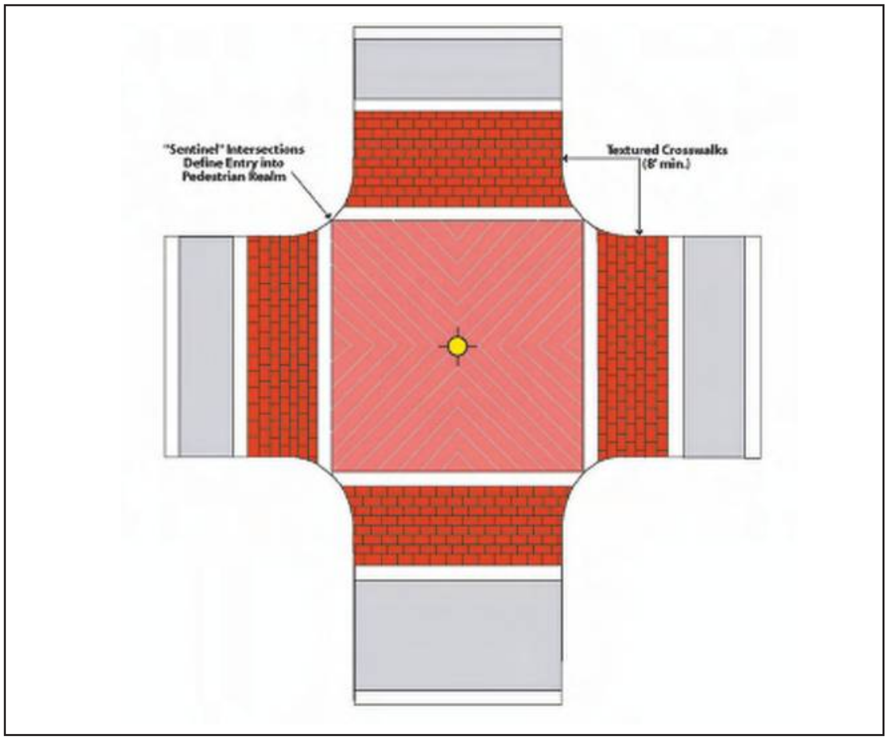

Reduced curb cuts through inter-parcel access


Reduced curb cuts through creation of a parallel travel route

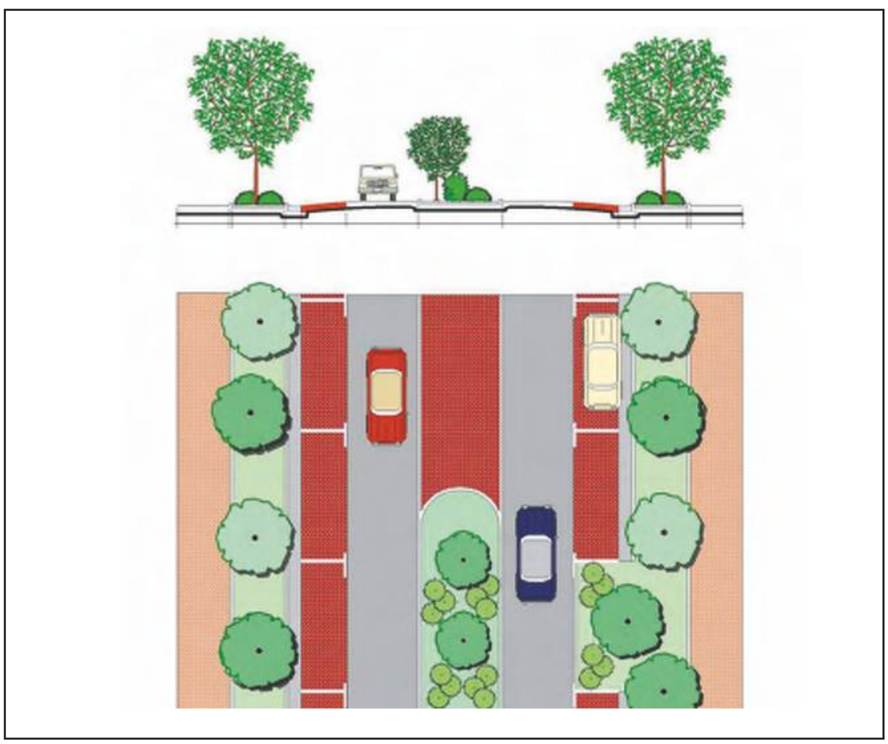
- **Tame Major Access Roads**

  The roadways within the area of the Shannon Mall are not particularly friendly to pedestrians. As the Shannon Mall area transitions into a downtown it is imperative that Shannon Parkway, Mall Boulevard, Oakley Road, Londonderry Way and Shannon Boulevard support the pedestrian environment that is the desire of the plan.

  Cross-sectional elements that should be incorporated are lane reductions, on-street parking, textured parking lanes/ medians, and plantings for both the parkway strips and median. Continuous sidewalks should be incorporated, as shown on the next page.



Proposed intersection treatment for intersections includes brick paving at crosswalks and colored treatment in the center to slow cars.



The proposed treatment of major streets in the Study Area includes on-street parking, paved turn lanes and landscaping.

Parking

General Parking Concept

The Concept Plan supports a balanced approach to parking which recognized the complex role of parking in the proposed mixed-use Town Center environment. The Concept Plan proposes achieving this through:

- **Shared Parking and Parking Requirements.** The Concept Plan modifies zoning and development regulations to increase parking efficiency, and reduce the land area needed for parking facilities by allowing shared use parking and lowering required parking ratios.

- **Preferential Parking.** The Plan calls for five percent of all parking spaces in Town Center office and civic uses should be made available for carpools and vanpools. Preferential parking spaces should be the most desirable in the Town Center, usually the spaces conveniently located near the entrance/exit (next to designated handicapped spaces). The stalls should be equipped with signage designating the space as reserved for a carpooler or vanpooler. This parking program would be done in conjunction with the commute options program funded through lease agreements.

- **Bicycle Parking.** The Plan integrates safe bicycle parking, with conveniently located bicycle racks and lockers close to the front door, into new development. For short-term storage, it calls for providing racks to accommodate at least two to five bicycle spaces for every 100 automobile parking spaces. For long-term storage and better protection from weather and vandalism, it calls for providing bicycle lockers.

- **Landscaping**. Surface parking lots are landscaped with street-front hedges, shade trees, and pedestrian walkways.

- **On-Street Parking.** Public on-street parking is allowed with durations controlled in a manner to insure that sufficient short-term parking is provided for visitors and shoppers in the districts, and not for employees. Enforced time restrictions will support retail establishments with the provision of premium parking for shoppers and visitors and discourage employees from parking directly in front of stores.

Park and Ride Concept

The GDOT park and ride facility is currently under used and not convenient to transit users. The Concept Plan recommends that transit be redirected to the Town Center area and the GDOT park and ride facility be used for rideshare participants and as a vanpool staging area, as well as partial redevelopment into office uses. To increase usage by rideshare participants, the following is recommended:

- **Decrease Parking Supply.** Approximately half of the parking area can be redeveloped with office uses and appropriate accessory retail. Retail could include dry cleaners, daycare facilities and other uses that serve local office tenets and rideshare participants. The remainder of the parking area should continue to serve as a rideshare staging area for both carpools and vanpools.

- **Market Ridesharing.** Information should be provided to area residents of the location, intent and hours of the parking facility, accompanied by user incentives. Information can be included on the city website, local newspapers, mailings to city residents and other citywide outreach methods. The city should enter into partnerships with GRTA's vanpool program and the Clean Air Campaign to provide incentives and marketing materials to promote ridesharing.

Transit Systems

The Concept Plan includes redirecting or constructing buildings, roads and sidewalks to facilitate transit access, and positioning jobs, shopping, services and housing near transit (or vice versa) so as to be within easy walking or bicycling distance. Surrounding residential areas must be connected to transit by a grid-type street network that offers multiple access paths.

In addition to these changes, the Plan supports infrastructure upgrades that will allow MARTA to change their current routes to provide improved service. To access employment centers residents will be traveling to and from the College Park station, linking with MARTA rail service and the airport. Fast and convenient connections should occur between the Town Center and the College Park station and between the town center and the airport (this will also encourage airport employees to reside in the new town center area). In addition, buses can provide circulator service for students, residents and employees within the town center area. The city should work closely with MARTA, assisting with route changes and improving the frequency of service.

To assist in achieving this vision the City must improve the local roadway infrastructure and partner with MARTA on service provision. The following recommendations focus on improving transit service in the Town Center:

- Upgrading Shannon Parkway to support MARTA buses.
- Rerouting route #190 to run from the GDOT park and ride lot on Flat Shoals Road to Shannon Mall using local streets.
- Upgrading Shannon Parkway to support MARTA buses.
- Providing bus shelters and schedules.
- Redeveloping a portion of the GDOT park and ride lot into office uses to reduce locate high transit trip generating land uses adjacent to transit infrastructure.
- Developing a transit promotion program, which could include kiosks or information centers to help employees, residents and visitors find bus route information. This should be accompanied by incentive programs to try transit.

Natural Systems

The Concept Plan protects Windham Creek and its 100 year oodplain through the creation of a greenway trail or park running from Watson Street to Oakley Road. Within this greenway, a multi-use trail is provided to allow for limited bicycling and walking opportunities. This increases interaction with existing natural systems and creates a public amenity from an otherwise underutilized space. It also serves a transportation role, by providing a quick, non-motorized option for east-west travel.

Buildings should orient themselves towards parks and plazas.

Public Realm

The Concept Plan enriches the public realm in the Town Center area by providing increased park space, sidewalks, street trees, civic uses and street-oriented buildings. The public realm will no longer be rejected, and will become a quality experience in the daily lives of residents and visitors to the Study Area.

Policies supporting and enriched public realm include:

- Ensuring that new small parks are provided as part of new single-family and townhome development.
- Requiring buildings that orient themselves to the street.
- Requiring buildings adjacent to parks or plazas to face said spaces.

Projects supporting these policies include:

- Creating a new park along Windham Creek, running from Oakley Road to Mayor's Park.
- Providing a community plaza as part of future revitalizing of Shannon Mall.
- Establishing a park behind the planned Wal-Mart, adjacent to Windham Creek.
- Transforming a portion of the island at Shannon Parkway and Flat Shoals Road into a neighborhood park or plaza.

Mixed-use buildings will become more common in the Study Area.

Land Uses

The land use component of the Concept Plan calls for increasing the mix of uses in the Town Center, both vertically and horizontally, while preserving and protecting existing residential areas from commercial and industrial encroachment. At the same time, the Concept Plan calls for actually decreasing the amount of commercial land in order to concentrate retail activity into walkable shopping streets, rather than dispersed, auto-oriented strip shopping centers. Residential options within the Study Area are increased through the provision of areas for future townhome, single-family, and multi-family housing within close proximity to new businesses and parks.

Over 10 years the Concept Plan represents:

- 200 new single-family homes
- 295 new townhomes
- 770 new loft or multifamily units
- 250,000 sf of new office space
- 35,057 sf absorption of currently vacant restaurant space
- 166,377 sf absorption of currently vacant retail space
- 73,566 sf decrease of currently vacant retail space, to be redeveloped into other uses
- 80 acres of new park space

Over 10-25 years the Concept Plan represents another:

- 50 new single-family homes
- 305 new townhomes
- 1,830 new loft or multifamily units
- 735,000 sf new office space
- 116,000 sf decrease of currently vacant retail space, to be redeveloped into other uses

The above-numbers re ect the transformation of the Study Area into a complex and economically vibrant center for retail, restaurants, residential and office uses.

Key land use **Polices** necessary to support the Concept Plan include:

- Protecting existing residential areas.
- Retaining existing auto-oriented commercial uses along Jonesboro Road, between Oak Street and the planned Wal-Mart access road.

- Protecting industrial uses and accompanying jobs in the Great West Industrial Park.
- Concentrating retail space and land as a means of preventing leap-frog development or the abandonment of existing retail areas.
- Reducing retail space to reflect market conditions.
- Encouraging the development of under-used retail into new uses.

Land use **Projects** consistent with these policies include:

- Transforming the parcels fronting and between Shannon Parkway and Londonderry Way into three-to-five story mixed-use buildings with ground floor retail or office space.
- Focussing ground floor, “Main Street” style storefront retail along Londonderry Way.
- Redeveloping the area around the Great West Industrial Park into a mix of multi-family and live-work spaces.
- Building townhomes between Shannon Mall and the proposed Windham Creek parkway.
- Lining Shannon Parkway, north of Mall Boulevard, with a mix of live-work units, small-scale offices.
- Establishing larger office areas on the GDOT park and ride lot, as well as in the northwestern corner of the intersection of Shannon Parkway and Windham Creek.
- Infilling the north side of Main Street (west of Church Street) with townhomes.
- Providing single-family and townhomes east of Church Street.
- Locating big box retail uses west of Shannon Parkway, on the planned Wal-Mart site.

The Land Use Concept also goes into detail on specific key parts of the Study Area. These areas are defined below.

<u>Shannon Mall</u>

The Concept Plan calls for Shannon Mall to the continue to be the heart of the Town Center well into the future. This may include the mall in its current form, or as a future redevelopment. The Concept Plan includes three options for Shannon Mall.

Option One: Retention includes keeping the mall in its current state, with no significant changes.

Option Two: Transformation includes the gradual transformation

Shannon Mall Option Two, Phase I

of Shannon Mall from an enclosed shopping center into an open, mixed-use urban neighborhood. This option includes a three phased approach intended to allow the mall to continue to operate during this transformation. Additionally, it includes a provision that the transformation may stop at any phase, although the final transformation is clearly preferable.

The following phases are included in Option Two:

- **Phase I** includes removing existing vacant anchor stores (1a at top left) to eliminate excess retail space and create opportunities for future redevelopment. It also includes developing exterior entrances and signage for tenants along the south side of the mall, facing I-85 (1b at top left) for the purpose of increasing access to interior retail and promoting convenience in an increasingly competitive retail market.

Shannon Mall Option Two, Phase II

- **Phase II** includes selling unused parking areas and former anchor space (2a at middle left) for redevelopment into housing, mixed uses or street-oriented retail. New streets are created to define redevelopment sites and establish a long-term urban framework. This phase also includes removing the covered central north-south core of the mall to create an internal “Avenue” (2b at middle left), which terminates on the north at civic-oriented town square (2c at middle left).

- **Phase III** includes removing the remaining covered portion of the mall to create a long pedestrian-oriented shopping street (3a at bottom left). At both ends of this new street, terminal points are created (3b at bottom left). Finally, the remaining under-utlized parking areas are sold for redevelopment into housing or street-oriented retail uses.

Option Three: Redevelopment is a complete demolition and redevelopment. This option incorporates housing, destination retail, and office uses into a walkable urban district. Civic and park spaces are included, so that the site can become the center for the Study Area and Union City. Parking is provided, but is located on the interior of new blocks, so as to not disrupt the urban fabric or pedestrian experience.

Please see the diagram on the next page showing one redevelopment concept.

Shannon Mall Option Two, Phase III

SHANNON MALL OPTION THREE: REDEVELOPMENT

GDOT Park and Ride Lot

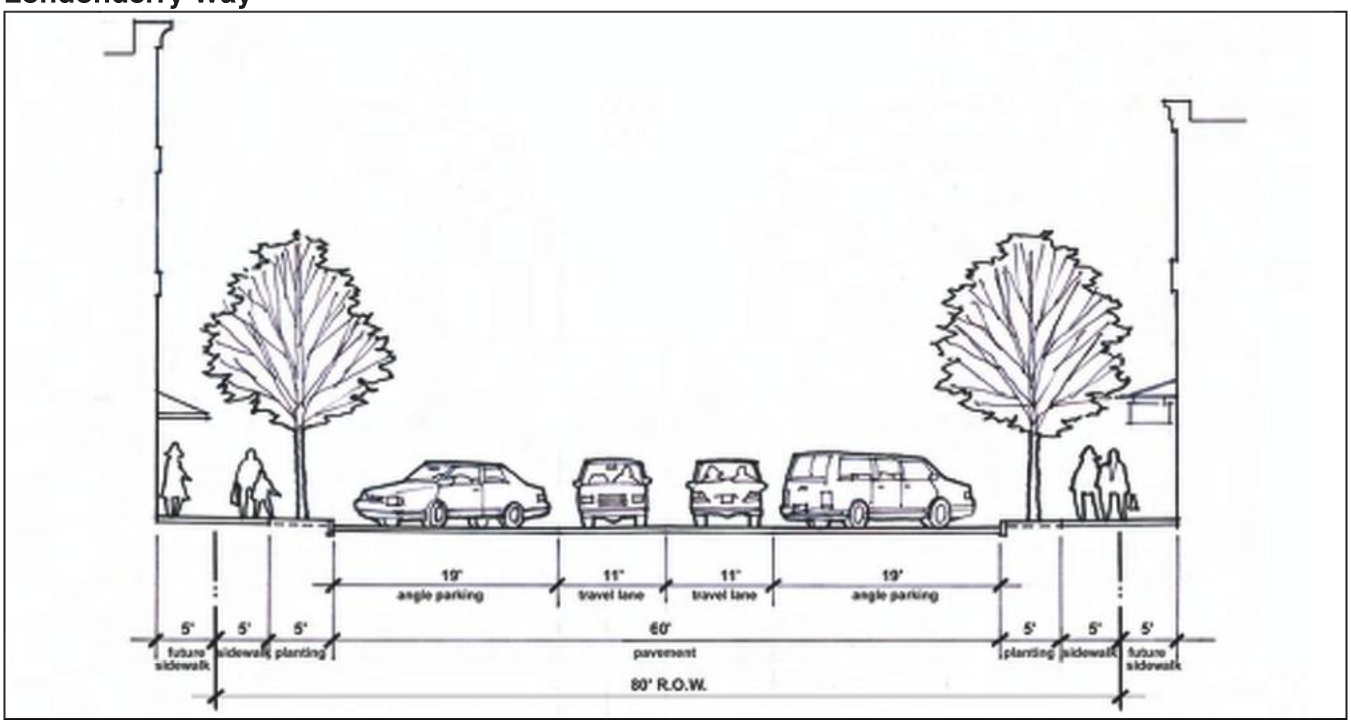
The Concept Plan proposes increasing the utilization of the park and ride lot on Flat Shoals Road by locating transit-supportive office uses adjacent to the facility. This includes the development of office uses on both the lot itself, and the undeveloped parcels to the west. Transit uses will continue to operate on the site, but in a more efficient capacity than currently exists. Van pools are encouraged to operate out of the site, in addition to traditional MARTA bus routes. However, because of abysmal utilization of the facility, it is recommended that the number of parking spaces be reduced by half.

Londonderry Way

The Concept Plan calls for transforming Londonderry Way from a high-speed, auto-oriented no-man's land into a pedestrian-oriented and intimate shopping street between Mall Boulevard and Lancaster Lane. Central to this are street-oriented buildings of three to five story mixed-use buildings with active ground oor uses. The length of this section of street is 1,700 feet. Because shopping streets seldom exceed 1,000 linear feet, it is unlikely that the entire distance could support sidewalk-oriented retail uses. As such, office and residential uses are encouraged at the north and south ends, in order to ensure a continuous retail experience at the center.

To support these land-uses, Londonderry Way's current 80 foot wide right-of-way should be reconfigured to include angled parking and wide sidewalks as shown below. Over the long term, new development could expand the proposed sidewalks by 5 feet.

Londonderry Way



Before: Today, Londonderry Way is a barren no-man's land. Buildings are set back far from the street and sidewalk-oriented uses are nonexistent. In addition, a five-lane, over-capacity street encourages speeding and creates a pedestrian-hostile environment.

After: The future Londonderry Way includes sidewalk-oriented buildings with housing or offices above, ground oor retail or office uses, and fifteen foot wide sidewalks. In addition, the street is narrow to one lane in each direction with on-street angled parking to support retail uses and buffer the pedestrian from moving cars.

Flat Shoals Corners

The northern end of the Study Area has long lacked a focal point. The Concept Plan establishes a small, mixed-use node around the intersection of Shannon Parkway and Flat Shoals Road. This node anchors the surrounding neighborhood and is a future gateway to the Town Center. It also provides retail uses, without contributing to the transformation of Flat Shoals Road into a commercial strip.

At its center the node includes a small community park developed from the existing under-utilized island between the two legs of Shannon Parkway. On three sides, this public space is surrounded with ground oor retail uses with one or two oors of housing above. On the southwestern side, live-work units provide opportunities for residents to run small businesses our of their own homes.

Parking is provided on-street and mid-block to ensure retail viability without contributing to visual blight.

2.6 EMPLOYMENT & POPULATION ANALYSIS

It is projected that the built-out Concept Plan will add jobs and population to the Town Center area as follows:

2013 Employment and Population

Currently, 8,307 employees work within the area immediately surrounding the Study Area. An estimated 3,514 employees work within the Study Area. When the Concept Plan is factored into this, 1,698 new jobs will be added to the Study Area. The following table displays projected employment gains from development in the Study Area.

Town Center Employment

	Retail*	Food and Beverage	Industrial	Office	Total
Existing					
Square Footage	770,000	55,000	160,000	60,000	1,045,000
Employees	2,800	407	107	200	3,514
Concept Plan					
Square Footage	166,377	35,057	0	250,000	451,434
Net Employees	605	260	0	833	1,698
Total Employment in 2013	**3,405**	**667**	**107**	**1,033**	**5,212**

*Number re ects occupied retail and does not include 275,000 sf of vacant retail space.

It is estimated that 2,820 people currently live within the Study Area. The Concept Plan will increase this number to 5,520 over the next ten years.

Town Center Population

	Single-Family	Townhomes	Live-Work	Multifamily	Total
Existing					
Existing Dwelling Units	211	225	0	921	1,357
Average Size	2.5	2.0	2.0	2.0	
Population	528	450	0	1,842	2,820
Concept Plan					
Concept Plan Dwelling Units	200	295	35	770	1,300
Average Household Size	2.5	2.0	2.0	2.0	
Population	500	590	70	1,540	2,700
Total Population by 2013	**1,028**	**1,040**	**70**	**3,382**	**5,520**

2028 Employment and Population

Forecasting employment and population growth beyond ten years is extremely difficult on the micro-level. Real estate and economic trends are extremely complex and subject to change. Although the Concept Plan is largely based on a ten-year build-out, longer-term forecasts can be made based on real estate cycles and the assumption that some existing facilities which reach the end of their economic life will be redevelopment into more intense uses.

Projected Change in Employment From 2003 - 2028

Year	Retail	Food & Beverage	Industrial	Office	Total
2003	2,800	407	107	200	3,514
2008	3,103	537	107	617	4,364
2013	3,405	667	107	1,033	5,212
2018	3,264	667	107	1,543	5,581
2023	3,123	667	107	2,053	5,950
2028	2,982	667	107	2,563	6,319

Employment within the Study Area is expected to grow over the next 25 years. Over the next ten years employment growth should be primarily in the retail and food & beverage categories. However, the establishment of the Town Center as an office address over the long-term should result in significant increases in job growth; at the same time, long-term retail jobs are expected to decrease as retail becomes more competitive and marginal retail properties are redeveloped into housing or office uses.

Projected Change in Housing Units From 2003 - 2028

Year	Single Family Units	Townhome Units	Live-Work Units	Multifamily Units	Total Units
2003	211	225	0	921	1,357
2008	311	373	35	1,306	2,025
2013	411	520	70	1,691	2,692
2018	461	625	70	2,301	3,457
2023	461	725	70	2,911	4,167
2028	461	825	70	3,521	4,877

The number of housing units within the Study Area is expected to greatly increase over the next 25 years. Single-family and townhome growth will be strong within the next ten years, but will decrease as the Town Center is developed. Longer-term, significant growth should occur in the number of multifamily units, particularly as the area's vibrant street life begins to emerge and the Town Center become South Fulton's premier live-work-place address.

Projected Change in Population From 2003 - 2028

Year	Single Family Residents	Townhome Residents	Live-Work Residents	Multifamily Residents	Total Residents
2003	528	450	0	1,842	2,820
2008	778	746	70	2,612	4,206
2013	1,028	1,040	140	3,382	5,590
2018	1,153	1,250	140	4,602	7,145
2023	1,153	1,450	140	5,822	8,565
2028	1,153	1,650	140	7,042	9,985

As the number of housing units increase so will the population. The table above shows project population growth between 2003 and 2028.

2.7 PARKING ANALYSIS

Current Parking Requirements

Based on the existing Union City Off-Street Parking and Service Requirements, the proposed Concept Plan redevelopment (the net increase in occupied commercial and residential) would require the provision of the following number of parking spaces. These totals re ect the gross peak parking demand calculated for each land use individually, as required by existing zoning regulations.

Parking Requirements Under Current Zoning

	MF RESIDENTIAL			OFFICE		
	Dwelling Units	Existing Zoning	Total Required	SQ FT	Existing Zoning	Total Required
10 YEAR CONCEPT PLAN	1,100	2 / DU	**2,200**	250,000	1 / emp. + 1 / 150 SQ FT	**2,667**
10 - 25 YEAR CONCEPT PLAN	3,270	2 / DU	**6,540**	985,000	1 / emp. + 1 / 150 SQ FT	**6,813**
	RESTAURANT			**RETAIL**		
	SQ FT	**Existing Zoning**	**Total Required**	**SQ FT**	**Existing Zoning**	**Total Required**
10 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	1 / 200 SQ FT	**832**
10 - 25 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	1 / 200 SQ FT	**832**
	GROSS PEAK PARKING DEMAND					
10 YEAR CONCEPT PLAN	**6,166**					
10 - 25 YEAR CONCEPT PLAN	**14,652**					

Shared Parking Requirement Recommendations

The following modified parking regulations re ect lower parking regulations for individual land uses that could be realized in a shared-parking arrangement. The ratios included here are not intended for inclusion in the zoning code, per se, but rather re ect demands when appropriate land use mixed are provided. The modified parking regulations are applied to the proposed redevelopment plan specifications (the net increase in occupied commercial and residential), as a baseline for assessment of recommended shared parking requirements. In order to fully assess shared parking dynamics, parking ratios are presented for both weekday and weekend (Saturday) scenarios.

Modified Parking Requirements - Weekdays

	MF RESIDENTIAL			OFFICE		
	Dwelling Units	Existing Zoning	Total Required	SQ FT	Existing Zoning	Total Required
10 YEAR CONCEPT PLAN	1,100	1.6 / DU	**1,760**	250,000	4 / 1000 SQ FT	**1,000**
10 - 25 YEAR CONCEPT PLAN	3,270	1.6 / DU	**5,232**	985,000	4 / 1000 SQ FT	**3,940**
	RESTAURANT			RETAIL		
	SQ FT	Existing Zoning	Total Required	SQ FT	Existing Zoning	Total Required
10 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	3.5 / 1000 SQ FT	**582**
10 - 25 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	3.5 / 1000 SQ FT	**582**
	GROSS PEAK PARKING DEMAND					
10 YEAR CONCEPT PLAN	**3,810**					
10 - 25 YEAR CONCEPT PLAN	**10,222**					

Modified Parking Requirements - Weekends

	MF RESIDENTIAL			OFFICE		
	Dwelling Units	Existing Zoning	Total Required	SQ FT	Existing Zoning	Total Required
10 YEAR CONCEPT PLAN	1,100	1.6 / DU	**1,760**	250,000	.5 / 1000 SQ FT	**125**
10 - 25 YEAR CONCEPT PLAN	3,270	1.6 / DU	**5,232**	985,000	.5 / 1000 SQ FT	**493**
	RESTAURANT			RETAIL		
	SQ FT	Existing Zoning	Total Required	SQ FT	Existing Zoning	Total Required
10 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	4 / 1000 SQ FT	**666**
10 - 25 YEAR CONCEPT PLAN	35,057	1 / 75 SQ FT	**467**	166,377	4 / 1000 SQ FT	**666**
	GROSS PEAK PARKING DEMAND					
10 YEAR CONCEPT PLAN	**3,018**					
10 - 25 YEAR CONCEPT PLAN	**6,857**					

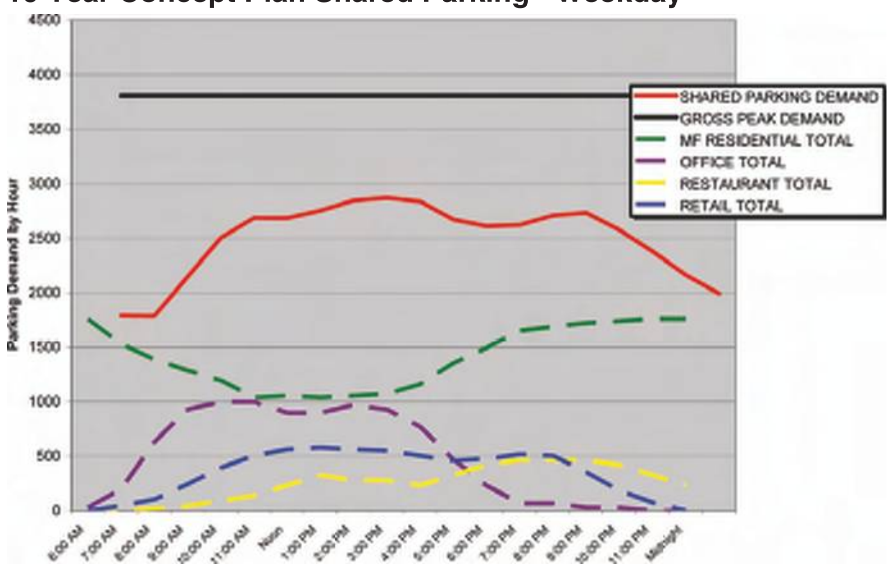
Shared Parking Permission

The Concept Plan calls for permitting shared parking in the Study Area. In order to better re ect the potential for shared use parking in the proposed mixed-use redevelopment project, the following examples are shown as illustrative examples for the proposed redevelopment project. Specific requirements should need to be developed once a specific development is actually proposed. In each example, the differential hourly peak demand demands of each land use allows for significantly less overall parking for the project as a whole. Union City off-street parking and service requirements would need to be modified to allow for such shared parking calculations.

For the 10-Year Concept Plan, the cumulative gross peak parking demand requirements for each land use separately, versus the shared parking requirements, are shown below (Shared Parking. Urban Land Institute. 1983):

- Gross Peak Parking Demand = 3,810
- Shared Parking Peak Demand = 2,871

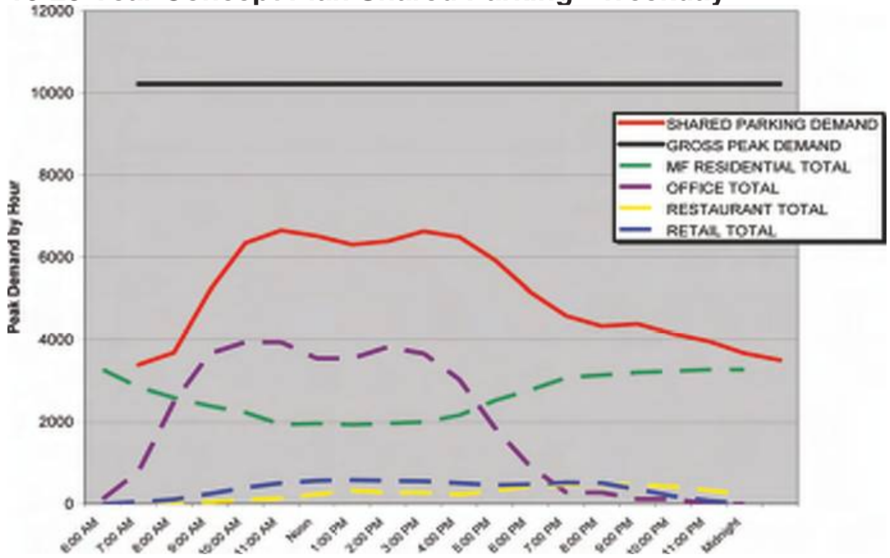
10 Year Concept Plan Shared Parking - Weekday



For the 10 – 25 Year Concept Plan, the cumulative gross peak parking demand requirements for each land use separately, versus the shared parking requirements, are shown below:

- Gross Peak Parking Demand = 10,222
- Shared Parking Peak Demand = 6,629

10-25 Year Concept Plan Shared Parking - Weekday



Additional parking analysis can be found in the Appendix.

2.8 TRIP GENERATION ANALYSIS

To ensure that the Concept Plan does not overburden facilities in the Study Area, an analysis of future conditions was undertaken. A formalized traffic impact statement was not performed under the scope of this plan due to the inherent exibility of the proposed development program. However, general trip generation figures were calculated using ITE's Trip Generation guidelines for the proposed Concept Plan and compared to the existing trip generation given the current land uses that occur within the Study Area. The table on the next page summarizes the results of those calculations for the existing condition, proposed 10-year development program, and longer-range 25-year program.

The relative traffic impacts call for an increase in daily trips in the range of 9,600 daily trips for the 10-year projection and of 27,000 for the 25-year horizon for the entire district. These figures represent increases of 32% and 62% respectively.

Some considerations should be made when analyzing those raw figures, however. The current development pattern does not support alternative modes of travel; therefore, many of the new trips could be accomplished by means other than personal automobile. Additionally, transit service is not currently available to serve localized trips within the study area. Furthermore, the mixture of uses within the Town Center will foster more interaction within the community than what exists today. Therefore, it is likely that the actual increase in vehicular trips that move beyond the boundaries of the Study Area will be significantly less that the raw trip generation projections.

From the supply side, the creation of new network as recommended demonstrates an increase in continuous east-west travel lanes through the district from six to ten, and in north-south lanes from six to twelve. In both directions, this increases the network capacity available to facilitate cross-district travel by 85%, satisfying the projected growth even if all trips were made by motor vehicle. In addition to the continuous network to be created, the ancillary network created along Jonesboro Road and within the Town Center will also facilitate intra-district vehicle trips, minimizing impacts to the major regional facilities such as Jonesboro Road and Flat Shoals Road.

Vehicular Trip Generation

Land Use	Intensity	Daily Trip Ends	PM Peak-Hour Trip Ends					AM Peak-Hour Trip Ends				
				In		Out			In		Out	
			Total	%	Trips	%	Trips	Total	%	Trips	%	Trips
Existing												
Industrial	160.0 KSF	1,093	157	0.12	19	0.88	138	100	0.83	83	0.17	17
Single Family	211.0 DU	2,053	212	0.65	138	0.35	74	154	0.26	40	0.74	114
Multi-Family	921.0 DU	5,999	501	0.68	340	0.32	160	456	0.17	77	0.83	378
Townhouse/Condo	225.0 DU	1,298	110	0.66	72	0.34	37	97	0.17	17	0.83	81
City Park	0.5 Acres	33	2	0.35	1	0.65	1			0		0
Office	60.0 KSF	954	128	0.17	22	0.83	106	128	0.89	114	0.11	14
Retail - 6th Edition	1,100.0 KSF	31,856	3,056	0.48	1,467	0.52	1,589	667	0.61	407	0.39	260
Total		43,285	4,165		2,059		2,106	1,602		738		864
Year 10												
Industrial	160.0 KSF	1,093	157	0.12	19	0.88	138	100	0.83	83	0.17	17
Single Family	411.0 DU	3,794	386	0.65	251	0.35	135	275	0.26	71	0.74	203
Multi-Family	1,691.0 DU	11,175	880	0.68	598	0.32	282	834	0.17	142	0.83	692
Townhouse/Condo	555.0 DU	2,796	230	0.66	152	0.34	78	198	0.17	34	0.83	164
City Park	80.5 Acres	255	253	0.35	88	0.65	164			0		0
Office	310.0 KSF	3,301	428	0.17	73	0.83	355	460	0.89	409	0.11	51
Retail - 6th Edition	1,026.0 KSF	30,461	2,919	0.48	1,401	0.52	1,518	640	0.61	390	0.39	250
Total		52,874	5,253		2,582		2,670	2,506		1,130		1,377
Year 0-Year 10 Change		*22%*	*26%*		*25%*		*27%*	*56%*		*53%*		*59%*
Year 25												
Industrial	160.0 KSF	1,093	157	0.12	19	0.88	138	100	0.83	83	0.17	17
Single Family	461.0 DU	4,217	429	0.65	279	0.35	150	304	0.26	79	0.74	225
Multi-Family	3,521.0 DU	23,683	1,738	0.68	1,182	0.32	556	1,732	0.17	294	0.83	1,438
Townhouse/Condo	895.0 DU	4,198	340	0.66	224	0.34	115	288	0.17	49	0.83	239
City Park	80.5 Acres	255	253	0.35	88	0.65	164			0		0
Office	1,045.0 KSF	8,271	1,048	0.17	178	0.83	870	1,183	0.89	1,053	0.11	130
Retail - 6th Edition	910.0 KSF	28,199	2,697	0.48	1,295	0.52	1,402	596	0.61	363	0.39	232
Total		69,915	6,660		3,264		3,396	4,202		1,921		2,281
Year 10-Year 25 Change		*32%*	*27%*		*26%*		*27%*	*68%*		*70%*		*66%*
Year 0-Year 25 Change		*62%*	*60%*		*59%*		*61%*	*162%*		*160%*		*164%*

Section 3: Implementation

3.1 DESIGN GUIDELINES

For the Concept Plan to be successful, the approach to designing the built environment within the Study Area must change. Because a strong, well-balanced relationship between land uses, buildings, and public spaces is essential to the Concept Plan, neither buildings nor developments can be designed as stand-alone objects with no regard for their surroundings. Rather, everything within the Study Area must be held to the same exacting and inter-related standards of design.

Regardless of type or use, all buildings within the Study Area should meet basic standards of good design. The following guidelines are intended to provide guidance for both private developers and the City of Union City. In addition, many of the guidelines should be included in a new Union City Town Center zoning district.

Buildings and Sites

- Face primary building entrances to the public sidewalk and street.
- Require uses to have entrances directly accessible from the adjacent sidewalk.
- Prohibit blank walls adjacent to the street or sidewalk.
- Require commercial uses to front the sidewalk with storefronts.
- Require all commercial and mixed-use buildings to have a minimum height of 24 feet.
- Limit building height to 60 feet (approximately five to 6 stories) in the Shannon Town Center neighborhood.
- Limit building height to 35 feet (approximately three stories) in all other areas.
- Screen loading and dumpster areas from the street by locating them behind buildings.
- Require large developments to provide usable open space in the form of park, courtyards or plazas.
- Screen mechanical equipment on roof from public view.

Streets

- Require new blocks, not exceeding 800 feet by 800 feet, but averaging not more than 600 feet in length.
- Require developers to build the streets shown on the Concept Plan Maps for the portion of such within their property.

Allow said streets to count towards any zoning open space requirements.

- Prohibit gates or fences across any streets or private drivers, with the exception of driveways serving single-family homes.

Parking and Parking Lots

- Limit curb cuts to one per development street frontage.
- Permit shared parking.
- Provide walkways connecting parking lots and sidewalks.
- Provide a five foot wide landscape buffer (including trees) between all parking lots adjacent and the street.
- Place all parking areas behind or to the side of buildings. Parking between a building and the street is not acceptable.

Sidewalks

Public sidewalks shall be located along all public streets and shall have minimum widths as specified below. Sidewalks shall consist of two zones: a Street Furniture and Tree Planting Zone and a Clear Zone.

On existing streets and without redevelopment:

- Require sidewalks to have a minimum total width of six feet, including a minimum one foot wide Street Furniture and Tree Planting Zone adjacent to the curb and a five foot wide Clear Zone.

On new streets or with redevelopment:

- Require sidewalks adjacent to commercial, industrial or mixed-uses to have a minimum total width of 17 feet, including a seven foot wide Street Furniture and Tree Planting Zone adjacent to the curb, and a ten foot wide Clear Zone.
- Require sidewalks adjacent to residential uses to have a minimum total width of twelve feet, including a seven foot wide Street Furniture and Tree Planting Zone adjacent to the curb, and a five foot wide Clear Zone.

Supplemental Zones

The area at the back of the sidewalk and between the sidewalk and the building shall be defined as the Supplemental Zone. New development shall:

- Build all buildings at the back of the Supplemental Zone.

- Provide a five feet deep Supplemental Zone along Jonesboro Road and where outdoor dining is adjacent to the street.
- Provide a supplemental zone with a depth of between ten and twenty feet between multifamily uses and the sidewalk.
- Limit the height of fences within a Supplemental Zone adjacent to residential uses to forty-two inches.
- Prohibited fences within a Supplemental Zone adjacent to non-residential uses.

Signs

- Prohibit freestanding signs between a building and the street, except along Jonesboro Road.
- Permit free-standing signs only when they are not located closer to the front lot line that the principal building, except along Jonesboro Road.
- Limit freestanding signs to 24 feet in height.
- Require signs between a building and the street to be applied to buildings.

Park and Open Space Surroundings

- Surround parks and open spaces with streets and development. Vacant land adjacent to a park decreases visibility into and security.
- Ensure that adjacent streets are along a minimum of 50 percent of the park's perimeter and optimally along 100 percent of its perimeter. The safest parks are those that

These homes in Atlanta face Freedom Park and are separated from it by a street, ensuring maximum public access.

are completely visible to neighbors and police driving on surrounding streets.

- Face surrounding buildings onto park or opens spaces; avoid back yards abutting the park. Without exception, parks with abutting backyards that are screened from visibility by backyard fences are less safe than others.
- Ensure that no streets dead end into parks creating security problems.

Park and Open Space Design

- Ensure visibility into the park from surrounding homes and streets.
- Eliminate and avoid barriers and walls surrounding a park or open space that restrict accessibility, reduce the service area, and create security problems along edges.
- Ensure that parks and open spaces are at-grade with adjacent streets for a minimum depth of fifteen feet from said street to ensure maximum visibility into them.

This park in Memphis is designed so that it can be seen into from the adjacent street.

A small low fence surrounds these townhomes, while the buildings themselves create a barrier to internal areas.

Taller fences are provided between buildings, while lower fences with gates are along the street.

Designing for Security:

One of the biggest threats to the creation of a walkable, vibrant neighborhood is the potential proliferation of gated multifamily and single-family communities. Although the Study Area has historically been gate-free, recent new developments have resulted in several gated communities within the Study Area.

While the desire for security is understandable, the gating off of an entire community from its surroundings is not acceptable within the Study Area. Conventional gating not only prevents the connectivity that is essential to the Concept Plan, it also serves to segregate residents and promote social isolation. Gated communities also do a great disservice to existing residents of the community who, in many cases, have lived their for decades by suggesting that the community they know and value is something which the newcomer must be isolated from. Additionally, the security benefits of gating a development are oftentimes more psychological than reality-based. Studies across the nation have shown that gated communities can make their residents more naïve and, as a result, more prone to crime within their walls. In fact, it is sometimes argued that gated communities actually promote crime by removing eyes from the street, creating a false perception of security, and promoting social isolation.

Hundreds of developments across the nation have shown it is possible to provide meaningful security without surrounding a multifamily complex or single-family development with gates and fences. The following principles are best practices which should be observed within the Study Area if it to ever truly transform from an anti-pedestrian, disconnected collection of buildings into a truly walkable and cohesive neighborhood.

Principle 1: Use buildings to secure space

The most important principle in providing security without creating a conventional gated community is use buildings themselves to provide security. Arranging street-oriented buildings in a continuous wall around a block and then locating parking on the interior of a block creates a de-facto secure zone at the interior of the block. Between the buildings and the street, shorter fences, which should not exceed 42 inches in height, can be provided to differentiate between public and private space, while larger, more functional security fences can be provided at breaks in buildings. See image at top left.

By using this technique, security is provided without utilizing a high fence. More importantly, however, is that the development does not appear to be separate from the community because buildings relate to the street and the fencing that is provided between the building

This building provides a secure door into internal hallways, but is not gated from the street.

and the street is at a traditional human scale.

Principle 2: Provide security on doors

In traditional community design, security occurred at the door. Doors faced the street and often had gates that allowed residents to access the street. The same principle applies today. Doors should face the street and allow residents to walk directly onto them. Street-facing doors should be adequately secured with locks in the unlikely event that somebody would jump the maximum 42-inch fence.

In some cases, gated doors or entries can be recessed into the façade of the building to provide security without gating the entire community. This is most effective in cases where inner corridors access the street for non street-level units. See image at left.

Principle 3: Provide open streets

An interconnected system of streets is essential to achieving Principles 1 and 2. Streets creating blocks not in excess of 800 feet in length should be provided in all multifamily and single-family communities. Said streets should not be gated and should allow public access. If any gates or fences are to be provided, they should only be around off-street parking areas and not the streets themselves.

3.2 CITY CODE AMENDMENTS

The Concept Plan cannot be implemented under current City of Union City zoning and land use regulations. Currents regulations do not permit significant mix of uses or require pedestrian-oriented buildings, as establishing in 3.1 Design Guidelines. Both the zoning code and Future Land Use Plan Map must be amended if the vision embodied in the Concept Plan is to move into reality.

Zoning Changes

General Zoning Changes

Fundamental to the success of the Concept Plan is the creation of a new Town Center zoning district. This district must embody the design guidelines contained in section 3.1 Design Guidelines and must permit a mix of uses. Because the Study Area includes many different existing and proposed land uses, the proposed zoning district should include a variety of subareas, including:

- A medium-to-high density mixed-use subarea around Shannon Mall, supporting intense commercial uses with housing above.
- A low-to-medium density mixed-use subarea at Flat Shoals Corners, supporting intense neighborhood commercial uses with housing above.
- A multifamily subarea in current and proposed townhome and multifamily areas.
- A single-family subarea in current and proposed single-family areas
- An industrial subarea in the Great West Industrial Park.

These changes may require rezoning existing commercially-zoned properties to residential districts. However, associated residential density increases should avert any decrease in property value, particularly given an over-abundance of commercially-zoned land.

Parking Requirement Changes

Current parking regulations must also be changed within the Study Area. It is essential to provide parking facilities and policies that complement recommended land uses and encourage multi-modal connections. The following provides recommendations to guide parking management in the Union City LCI study area:

- Amend City of Union City Zoning Code to permit shared parking and lower parking ratios within the Town Center.
- Require five percent of all parking spaces in the town center

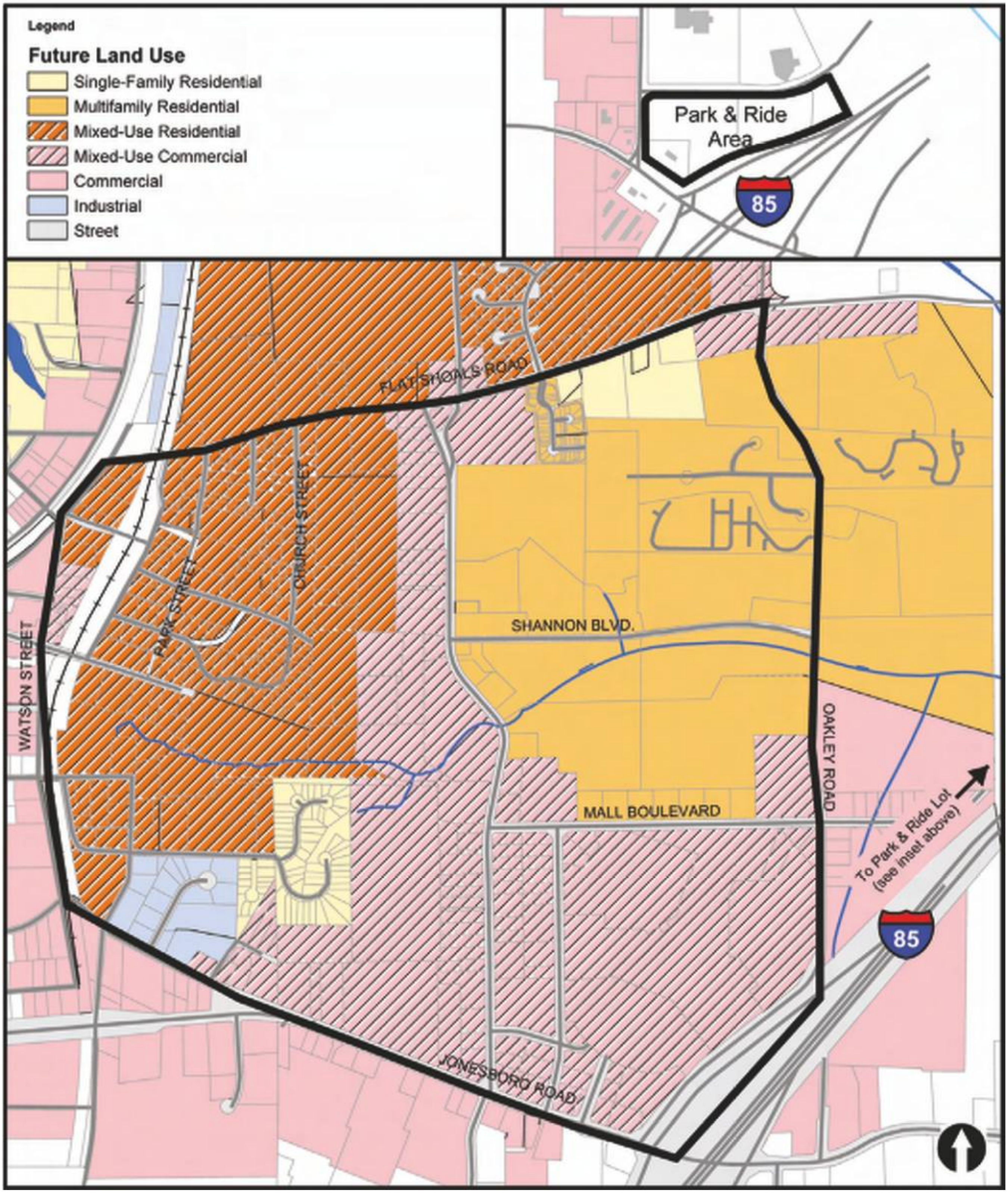
office and civic uses to be made available for carpools and vanpools.

- Require bicycle Parking in new commercial developments.
- Continue requirements for surface parking lots to be landscaped with street-front hedges, shade trees, and pedestrian walkways.
- Allow public on-street parking should to be allowed and counted towards required parking spaces.

Land Use Plan Map Changes

The Future Land Use Plan Map should be changed to include a new land use classification called "Mixed-Use Commercial. This classification should support a vertical or horizontal mix of residential, retail, office and civic uses. Land within the Study Area should be classified as this and other designations according to the Proposed Future Land Use Map on the following page.

UNION CITY PROPOSED LAND USE PLAN CLASSIFICATIONS



3.3 ACTION PROGRAM

The Action Program outlines the next steps in the process after adoption of this plan by the City of Union City. It includes a list of strategies, policies, and programs, and/or projects, timelines and responsible parties. Most important, this plan is attempting to address conflict among different land uses, growth and traffic while providing livable communities, places where people can live/work and enjoy, balancing economic growth while preserving natural resources and overall improving the quality of life of the residents of the area.

Stakeholders participating in development of the original LCI study identified several efforts to assure implementation. These included continued diligence on the part of area residents and business to monitor development within the Study Area and ensure compliance with the Concept Plan. Such diligence will need to occur on the neighborhood and City level. Stakeholders also must continue working with the City in implementing land use and zoning changes which support the Concept Plan as part of the Comprehensive Plan.

The Atlanta Regional Commission provides funding for implementation of transportation-related elements of a new LCI out of a desire for public infrastructure investments to spur private investment within existing activity centers. As this LCI study was originally developed in 2003, the strategies for funding improvements outlined in this update will rely upon other sources of funding and investment tapped by the City. Several options for funding are available and many have been successfully used by the City for previous improvements within the LCI area. These funding options include:

- **Tax Allocation District (TAD):** A TAD is a special taxing district wherein taxes generated by new development are used to retire bonds issued to support improvements in the district. The City has an established TAD that overlaps parts of the LCI study area.
- **Transportation Special Purpose Local Option Sales Tax (TSPLOST):** Fulton County voters approved a 0.75 cent TSPLOST in 2016. Each city in the County manages and implements its own project list with the funds raised through the additional sales tax.
- **Local Bonds:** The City could hold a local citywide bond referendum to fund quality-of-life improvements in the city. Said bond would be retired through an increased millage rate.

- **Community Improvement District (CID):** A CID is a self-imposed, self-taxing district run by a non-profit organization. A CID is charged with raising funds from commercial properties for public improvements. The City of Union City could investigate creating a CID for the Town Center area.
- **Community Development Block Grant (CDBG):** Fulton County receives an annual allocation of CDBG funds from HUD and Union City is eligible to propose projects for funding as long as they address issues in a "low- or moderate-income" area as defined by HUD.
- **Georgia Environmental Finance Authority (GEFA) Loan Funds:** The state operates several loan programs to assist municipalities in financing water, wastewater, and solid waste infrastructure projects such as placing water and sewer lines, stormwater control projects, and wastewater treatment facilities.
- **Capital Improvements Program (CIP):** Although not a distinct source of funding, the City's CIP is a citywide implementation plan for public facilities and infrastructure projects. LCI area improvement projects can be added to the CIP and scheduled for completion as part of the City's ongoing work program.
- **Private Donations:** A local matches could also be obtained through soliciting area property owners, businesses, and residents. Although highly unusual, this method was used in Atlanta to fund public improvements in the Fairlie-Poplar district.

Without detailed analysis that is beyond the scope of this study, the ideal local match mechanism cannot be determined. However, the City should carefully explore all available options.

Five-Year Implementation Plan

Project	Location	Status	Projected Completion Date	Cost	Funding Source
Projects Planned or Underway (through 2026)					
Shannon Parkway Gateway and Median Improvements	Shannon Parkway	Procurement	August 2021	$949,378	CIP, GEFA
Citywide Waterline Service Replacement and Resurfacing Project	Citywide	Construction	August 2021	$256,845	GEFA
Lancaster Lane/Londonderry Way Resurfacing & Streetscape Improvements	Lancaster Lane/ Londonderry Way	Design	January 2022	$2,000,000	TSPLOST
I-85 @ SR 138/ Jonesboro Road	Along SR 138 east to Buffington Road	Preliminary Engineering	August 2025	$5,000,000	TSPLOST
Shannon Parkway Streetscape Improvements	Shannon Parkway from SR 138 to Flat Shoals Road	Concept	April 2022	Unknown	TAD, CIP

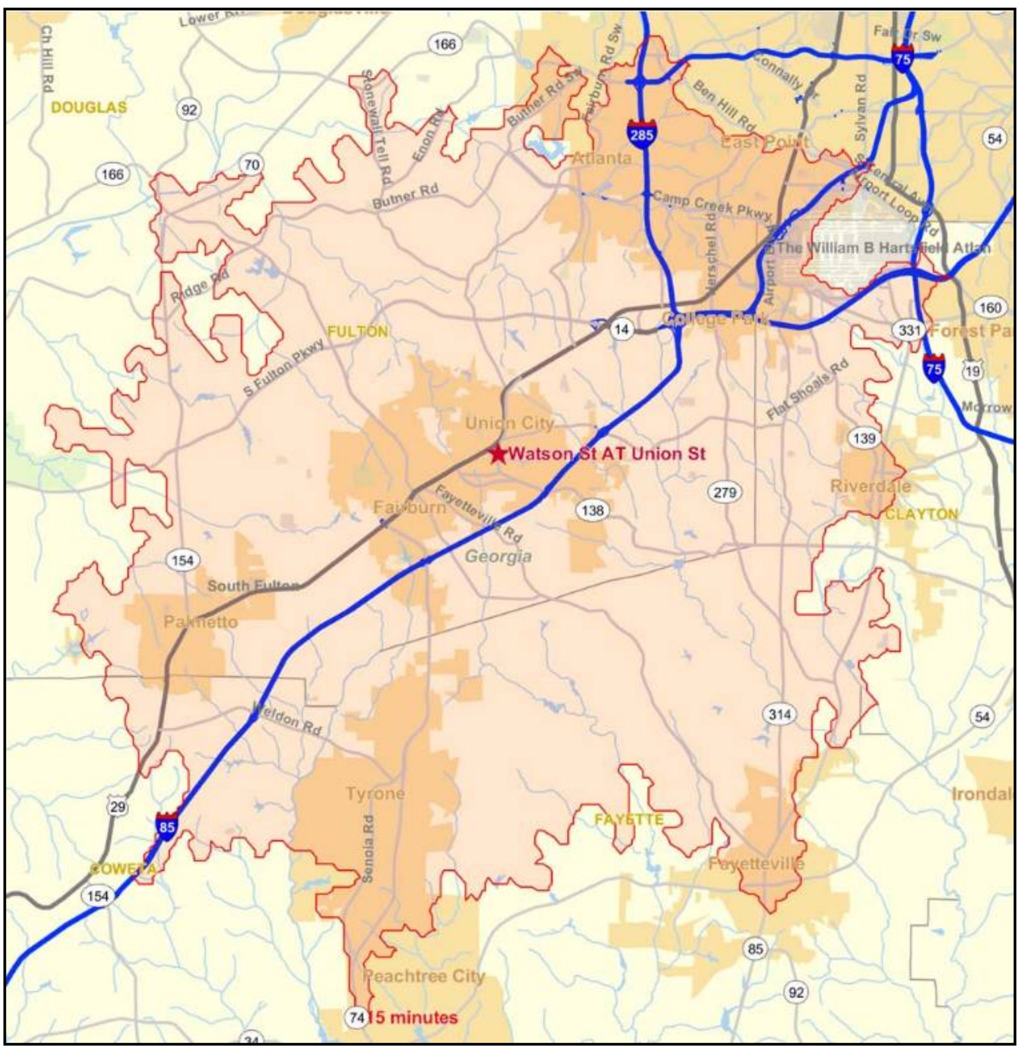
Section 4: Appendix

EXISITING CONDITIONS

DEMOGRAPHIC PROFILE

The socioeconomic characteristics of the residential and retail market area that surrounds Union City are provided in this section. The market area is defined by a 15-minute drive from the intersection of Union Street and Watson Street and is defined as the geographic area from which the large majority of potential customers or residents of new housing developed in the study area originate. The delineation of the market area (shown on the map below) is not meant to suggest that prospective customers of study area businesses and residents of newly developed housing will be drawn solely from this geographic area. Because of Union City's location, historic resources and mix of new and existing businesses, it is expected that prospective customers will also be attracted to the study area from outside of the market area.

Residential and Retail Market Areas



Comparisons with Union City, the Atlanta Metropolitan Statistical Area (MSA) and the state of Georgia are made where appropriate. Demographic and economic trends are analyzed for the 1990-2008 timeframe.

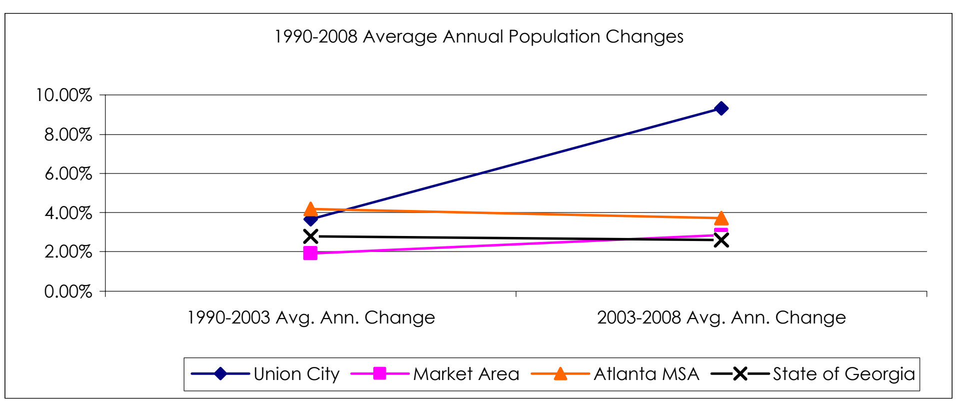
Population & Household Growth

Exhibit S-1 shows a decade of moderately strong growth within the market area. In 2003, the market area population is estimated at 185,753, representing an average annual increase of 2,869 persons or a 1.93% average annual rate of increase since 1990. Forecasts for 2003-2008 show an increase in the rate of growth as the population is expected to increase by 2.83% annually. Numerically, population growth is expected to increase by 5,263 persons per year.

EXHIBIT S-1

POPULATION GROWTH
Union City, Atlanta MSA, Market Area and State of Georgia
1990-2008

Geographic Location	1990	Avg. Ann. Change 1990-2003			Avg. Ann. Change 2003-2008		
		2003 (Estimate)	Number	Percent	2008 (Forecast)	Number	Percent
Union City							
Population	9,687	14,290	354	3.66%	20,950	1,332	9.32%
Households	4,302	6,120	140	3.25%	8,992	574	9.39%
Avg. Household Size	2.24	2.33	0.007		2.31	-0.004	
Market Area							
Population	148,452	185,753	2,869	1.93%	212,070	5,263	2.83%
Households	55,587	68,750	1,013	1.82%	79,255	2,101	3.06%
Avg. Household Size	2.66	2.69	0.002		2.68	-0.002	
Atlanta MSA							
Population	2,959,950	4,563,299	123,335	4.17%	5,409,173	169,175	3.71%
Households	1,102,578	1,660,786	42,939	3.89%	1,973,490	62,541	3.77%
Avg. Household Size	2.64	2.70	0.005		2.70	0.000	
State of Georgia							
Population	6,478,216	8,813,345	179,625	2.77%	9,955,004	228,332	2.59%
Households	2,366,615	3,232,700	66,622	2.82%	3,672,185	87,897	2.72%
Avg. Household Size	2.66	2.65	-0.001		2.65	0.000	



Note: 2003 and 2008 figures for Union City and the Market Area are adjusted to reflect 2000-2003 residential permit activity in Union City.

Source: ESRI BIS

From 1990-2003, the average annual household growth rate within the market area was 1.82%, below the population growth rate. This trend is expected to reverse in the next five years, with a projected annual household growth rate of 3.06%.

Population growth within Union City has rapidly increased in recent years. Based on 2000 Census Data and 2000-2003 permit activity, Union City's population grew at an estimated average annual rate of 3.66% from 1990-2003; numerically, population increased from 9,687 in 1990 to an estimated 14,290 in 2003 (354 persons per year). Between 2003 and 2008, Union City is expected to continue to undergo strong population growth, increasing at a projected annual rate of 9.32% or 1,332 persons per year. Similar to the market area, household growth in Union City was lower than population growth during the 1990s (3.25% annually), which is expected to reverse during the 2003-2008 period (9.39% annually). Population and household growth projections for Union City could exceed expected levels if a residential development program is implemented within the study area.

Between 1990 and 2003, population growth within the Atlanta MSA was extremely strong, an average of 4.17% annually compared to 3.66% within Union City and 1.93% within the market area. In the 1990s, population growth within the Atlanta MSA was largely fueled by a booming economy. Between 2003 and 2008, annual population growth in the Atlanta MSA is expected to remain strong but decrease to 3.71%.

Population and household growth in the state of Georgia during the 1990s was above growth levels within the market area but below Union City and the Atlanta MSA. In 2000, the state of Georgia ranked fourth nationally in terms of its numeric growth rate as its population increased 26.4% from 1990-2000; the national average was 13.2%. California, Texas and Florida experienced more total growth than Georgia, but much of the growth in those three states has been due to immigration. Projections for the state of Georgia for the next five years reveal some slowing in the average annual growth rate to 2.59%.

Average household size within all but one of the geographic areas (the state of Georgia) increased between 1990 and 2003 but should decrease or remain constant over the next five years in all four areas. Among the four geographic areas, household size is expected to continue to be the highest in the Atlanta MSA, followed by the market area, state and Union City. Nationwide, household size has been declining as a result of an increase in the number of elderly, fewer children (persons under 18), an increase in young, single persons representing new households formed of persons born during the "baby boom" years and an increase in single parent households.

Age Distribution

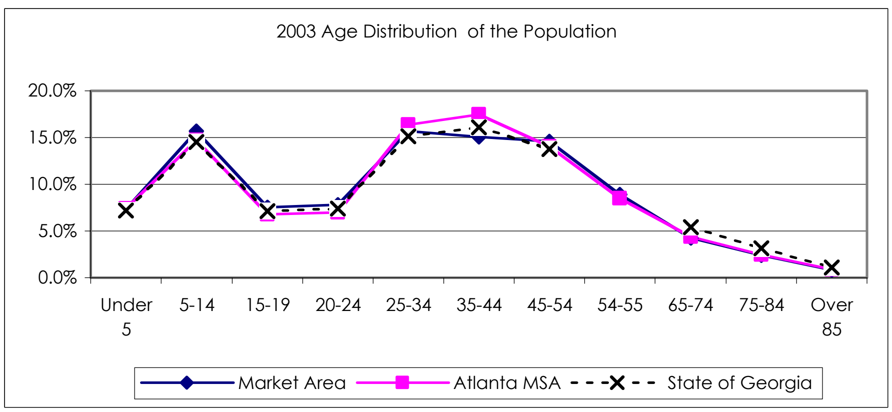
The age distribution of the population within the market area reveals a population slightly younger than in the Atlanta MSA and state. In 2003, the median age within the market area was 33.0 years compared to 34.2 years within the Atlanta MSA and 34.6 years in the state of Georgia (Exhibit S-2).

Within the market area, the proportion of the population under the age of 15 in 2003 is estimated at 23%, compared to 22% within the MSA and state of Georgia. Fifteen percent (15%) of the market area population is age 15 to 24,

EXHIBIT S-2

POPULATION BY AGE
Market Area, Atlanta MSA and State of Georgia
2003

Age Category	Market Area		Atlanta MSA		State of Georgia	
	Number	Percent	Number	Percent	Number	Percent
Under 5	13,482	7.3%	336,000	7.4%	631,536	7.2%
5-14	28,853	15.7%	674,208	14.8%	1,283,917	14.6%
15-19	13,782	7.5%	309,140	6.8%	627,625	7.1%
20-24	14,265	7.8%	316,373	6.9%	651,006	7.4%
25-34	28,889	15.7%	748,212	16.4%	1,336,140	15.2%
35-44	27,770	15.1%	797,695	17.5%	1,420,147	16.1%
45-64	26,930	14.6%	642,976	14.1%	1,217,384	13.8%
55-64	16,344	8.9%	385,392	8.4%	794,355	9.0%
65-74	7,729	4.2%	200,391	4.4%	473,732	5.4%
75-84	4,408	2.4%	113,276	2.5%	279,508	3.2%
Over 85	1,554	0.8%	39,636	0.9%	97,995	1.1%
Total	184,006	100.0%	4,563,299	100.0%	8,813,345	100.0%
Median Age	33.0		34.2		34.6	



Source: ESRI BIS

above the MSA (14%) but equal to the state (15%). Prime consumer age categories, 25 to 64, make up 54% of the market area population, below the Atlanta MSA (56%) and equal to statewide (54%) proportions. Seven percent (7%) of market area residents are over 65 years of age, below MSA (8%) and state (10%) proportions.

Household Income Distribution

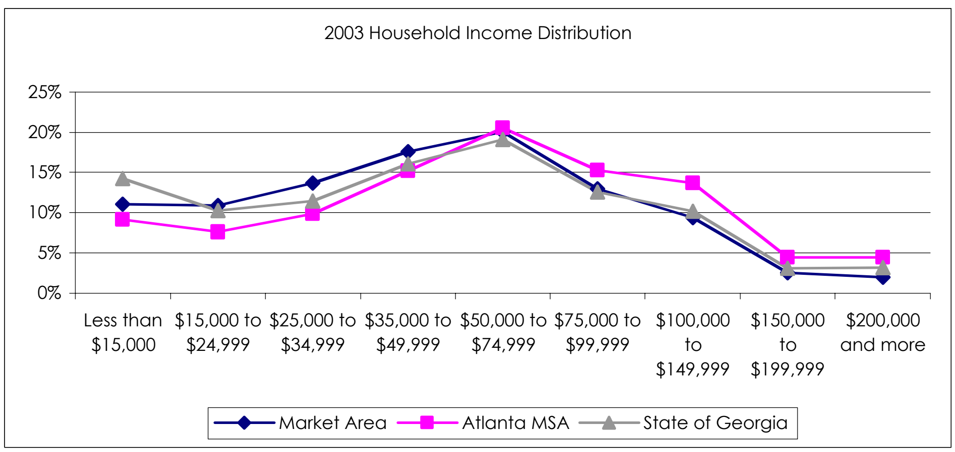
Market area residents are generally less affluent than households within the Atlanta MSA but similar to households throughout the state. The estimated 2003 market area median household income is $46,986, below MSA ($59,515) and statewide ($48,001) median household incomes (Exhibit S-3).

In 2003, the estimated income distribution for households residing within the market area shows that 22% of the households have annual incomes of less than $25,000, compared to 17% in the Atlanta MSA and 24% in the state of

EXHIBIT S-3

HOUSEHOLD INCOME
Market Area, Atlanta MSA and State of Georgia
2003

Income	Market Area		Atlanta MSA		State of Georgia	
	Number	Percent	Number	Percent	Number	Percent
Less than $15,000	7,510	11.0%	151,329	9.1%	460,655	14.2%
$15,000 to $24,999	7,369	10.8%	126,007	7.6%	330,158	10.2%
$25,000 to $34,999	9,264	13.6%	162,652	9.8%	369,752	11.4%
$35,000 to $49,999	11,952	17.6%	251,490	15.1%	518,859	16.1%
$50,000 to $74,999	13,633	20.1%	340,937	20.5%	617,010	19.1%
$75,000 to $99,999	8,823	13.0%	252,838	15.2%	404,415	12.5%
$100,000 to $149,999	6,363	9.4%	227,369	13.7%	328,093	10.1%
$150,000 to $199,999	1,744	2.6%	73,884	4.4%	99,824	3.1%
$200,000 and more	1,333	2.0%	74,280	4.5%	103,934	3.2%
Total	67,991	100.0%	1,660,786	100.0%	3,232,700	100.0%
	$46,986		$59,515		$48,001	



Source: ESRI BIS

Georgia. An estimated 31% of the households in the market area have incomes from $25,000 to $49,999, above MSA (25%) and state (27%) proportions. Thirty-three percent (33%) of market area households have annual incomes between $50,000 and $99,999, compared to 36% within the Atlanta MSA and 32% statewide. An estimated 12% of market area households have incomes between $100,000 and $199,999, below MSA (18%) and state (13%) proportions. Two percent (2%) of market area households have incomes exceeding $200,000, below 5% in the MSA and 3% statewide.

Racial Composition

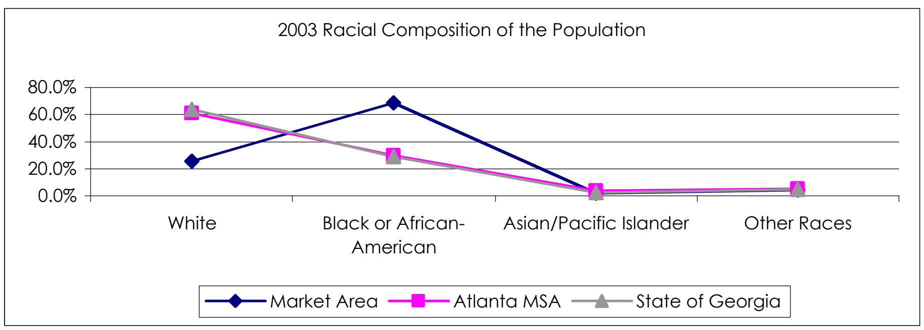
The 2003 estimated racial distribution for the market area reveals a population that, relative to the MSA and state, is predominantly black or African-

American. Sixty-nine percent (69%) of market area residents are black or African-American, 26% are white, 2% are Asian/Pacific Islander and 4% are categorized within "other" racial groups (Exhibit S-4). Over the next few years, the market area's population is expected to become slightly more diverse with growing proportions of residents who are white, Asian/Pacific Islander, Hispanic or fall within "other" racial groups.

Exhibit S-4

RACIAL COMPOSITION
Market Area, Atlanta MSA and State of Georgia
2003

Race	Market Area		Atlanta MSA		State of Georgia	
	Number	Percent	Number	Percent	Number	Percent
White	47,059	25.6%	2,789,644	61.1%	5,620,599	63.8%
Black or African-American	126,109	68.5%	1,352,843	29.6%	2,559,822	29.0%
Asian/Pacific Islander	3,142	1.7%	172,648	3.8%	219,170	2.5%
Other Races	7,696	4.2%	248,164	5.4%	413,754	4.7%
Total	184,006	100.0%	4,563,299	100.0%	8,813,345	100.0%
Hispanic (any race)	9,331	5.1%	358,652	7.9%	566,371	6.4%



Source: ESRI BIS

At the MSA and state level the racial distribution of both populations are similar but significantly different than the market area. Within the MSA in 2003, an estimated 61% of the population is white, 30% is black or African-American, 4% is Asian/Pacific and 5% fall into "other" racial or ethnic groups. Statewide, the distribution is 64%, 29%, 3% and 5%, respectively.

The proportion of the market area population that is Hispanic (5%) is below MSA (8%) and statewide (6%) proportions.

E. Lifestyle Characteristics

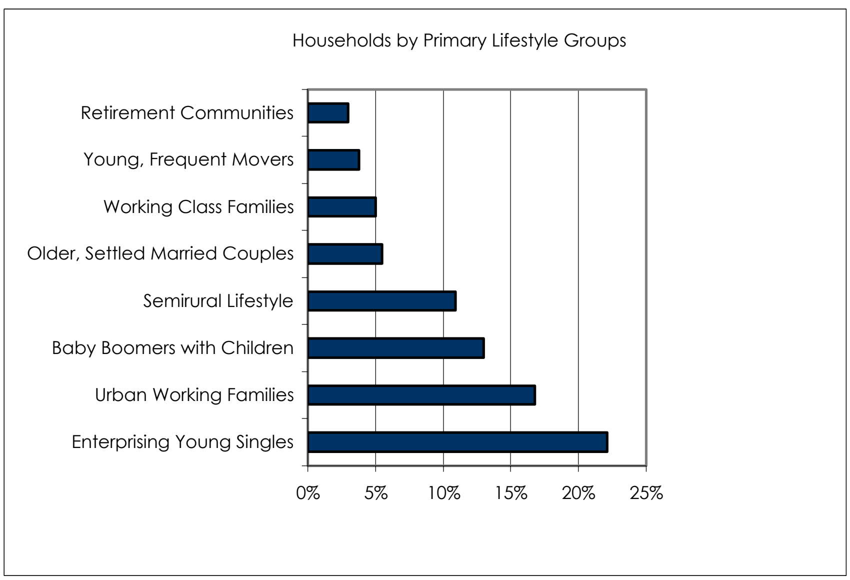
ACORN – A Classification of Residential Neighborhoods – categorizes neighborhoods throughout the nation into specific consumer groups or market segments. Neighborhoods are geographically defined by Census blocks, which are analyzed and sorted by over 60 characteristics including income, occupation, household type, age and other determinants of consumer behavior. People who share the same demographic characteristics may have widely divergent desires and preferences.

Households within the market area have been grouped into clusters or segments that bear descriptive names meant to convey a type of neighborhood or lifestyle. Exhibit S-5 shows the primary Lifestyle groups within the market area, with the characteristics of each provided in the following summaries. ACORN Lifestyle Reports are provided by ESRI Business Information

EXHIBIT S-5

HOUSEHOLDS BY PRIMARY LIFESTYLE GROUPS
Market Area
2003

Lifestyle Group	Percent of Households
Enterprising Young Singles	22.1%
Urban Working Families	16.8%
Baby Boomers with Children	13.0%
Semirural Lifestyle	10.9%
Older, Settled Married Couples	5.5%
Working Class Families	5.0%
Young, Frequent Movers	3.8%
Retirement Communities	3.0%
Total	80.1%



Source: ESRI BIS

Solutions (ESRI BIS).

1. **Enterprising Young Singles: 22% of Market Area Households**
   Socioeconomic
   - Young and mobile households.
   - Live alone or share housing with a single roommate.
   - Despite youth, incomes are slightly above average.
   - High labor force participation.

Residential
- Almost two-thirds are renters compared to 30% nationwide.
- Prefer newer apartment complexes in urbanized areas.

Preferences
- Active lifestyles.
- Play racquet sports, jog, go to the gym and lift weights.
- Go to nightclubs, museums and theme parks.
- Like to dine out and take out – including fast food.
- Since they are setting up their homes, buy furniture and appliances.
- Also buy apparel and electronic games.

2. Urban Working Families: 17% of Market Area Households

Socioeconomic
- Young, active families with 40% under the age of 20.
- High percentage of single-parent households.
- Despite above average labor force participation rate, have low incomes – the "working poor."
- Median income is 25% below the national average.
- Predominately black.

Residential
- Frequently live in older townhouse or small multifamily developments.
- Majority are renters.
- Among those that own their home, homes typically have below average values.

Preferences
- Buy lottery tickets, hair and skin products, infant and children's products and clothing.
- Enjoy team sports, such as football and basketball.
- Dine out at fast food establishments.

3. Baby Boomers with Children: 13% of Market Area Households

Socioeconomic
- Married with children and often mobile.
- Median age is 31.2 years although 35% are under the age of 20; 34% are between the ages of 25 and 44.
- Above average incomes, largely due to double income families.
- Tend to be mobile, seeking the best jobs and locations.
- Well educated.

Residential
- Single-family homes predominate, many of which were built during the 1970s.
- Most are owner-occupied and are valued slightly below the national average.

Preferences
- Spend time and money on home and family-oriented activities and goods.

- Enjoy outdoor activities such as gardening, camping, fishing and hunting.
- Indoor activities include using their PC, renting videos and going to the museum.
- Like fast food, takeout and delivery.
- Own pets.
- Spend money on swimming pools, outdoor grills, campers and multiple vehicles.

4. **Semirural Lifestyle: 11% of Market Area Households**

   Socioeconomic
   - Affluent, middle age (35 to 54) couples with and without children living at home.
   - Approximately one-third (35%) of households are "empty-nester" and 40% have school-age children living at home.
   - Median age is slightly above the national median
   - Predominately white with above average incomes.
   - While unemployment is low, many are self-employed and earn interest and dividend income.

   Residential
   - Often live in "semi-rural" communities just outside of metropolitan areas.
   - Live in homes with above-average values that are generally built after 1970.

   Preferences
   - Enjoy spending time around the house, working on home projects, gardening, reading and using their PCs.
   - Also enjoy golf, going to the movies and participating in civic and political groups.
   - Buy electronic gadgets, PCs, cameras, camcorders, home furnishings and tools.

5. **Older, Settled Married Couples: 6% of Market Area Households**

   Socioeconomic
   - Settled, middle aged married couples.
   - Many have school age and adult children.
   - Median income almost 30% above the national median and median net worth is 75% above the national median.
   - Almost 20% are drawing retirement income.
   - Predominately white.

   Residential
   - Usually own older, single family homes.
   - Average home values are slightly below the national average.

   Preferences
   - While Older, Settled Married Couples are active investors, they tend to carry debt (e.g., credit cards, car loans, etc.).

- Purchases are centered on the home, including home improvements, furnishings and outdoor equipment.
- Like to watch television, listen to jazz and golden oldies and read newspapers and magazines.

6. **Working Class Families: 5% of Market Area Households**

<u>Socioeconomic</u>
- Slightly older, often with grade school age or teenage children at home.
- Above average proportion of single parents.
- Many work in service or government jobs.
- High unemployment.
- Most (90%) are black or African-American.

<u>Residential</u>
- Live in dense, urban neighborhoods.
- Medium and high density housing is common.
- Median homes values are below average.

<u>Preferences</u>
- Spend heavily on apparel and TVs.
- While they own few cars, they buy luxury models.
- Like to play team sports, go to nightclubs, go to the movies and watch television.

7. **Young, Frequent Movers: 4% of Market Area Households**

<u>Socioeconomic</u>
- Young families with children.
- Tend to move frequently.
- Earn low to moderate incomes, with a median income 84% of the national median.
- High employment rates with many working in skilled and unskilled blue-collar jobs (farming, manufacturing, mining and construction).
- Racially diverse.

<u>Residential</u>
- Frequently live in mobile homes, six times the national average.
- Homes are valued below the national average and are usually newer and owner-occupied.

<u>Preferences</u>
- Enjoy outdoor activities such as hunting and fishing.
- Own trucks and SUVs.
- Top ranked for owning pets.
- Like to rent videos, listen to country music and read.

8. **Retirement Communities: 3% of Market Area Households**

<u>Socioeconomic</u>
- Older but not exclusively elderly with a median age of 40.
- Predominately single person households and married couples without children at home.

- Many are retired but those that work are employed in professional positions.
- Well-educated.
- High incomes, derived from Social Security, interest and dividends and salaries.

Residential
- Frequently live in congregate housing where meals are included with rent.
- Surrounded by neighborhoods with above-average home values and newly constructed homes.
- Enjoy warm climates.

Preferences
- Like to travel, particularly to international destinations.
- Enjoy sports and outdoor activities, including golfing, weight lifting, bicycling and camping.
- Indoor activities include listening to classical music and reading consumer, science and nature magazines.
- Own computers.
- Buy apparel (especially men's), books, furniture, sports equipment and VCRs.
- Eat out frequently, often at family restaurants and fast food establishments.

The eight Lifestyle groups summarized above account for fourth-fifths (80%) of market area households. While the characteristics of each of the Lifestyle groups vary, similarities exist between certain groups. A high proportion of households fall into younger Lifestyle groups, with average and above average incomes. Lifestyle groups with households that are predominantly middle age and older are also prevalent, usually with above average incomes. Primary Lifestyle groups within the market area may or may not have school age children living at home and while single-family homes are the predominant housing type, many households also tend to rent. Households generally lead active lifestyles, purchase various types of merchandise and services and frequently dine out. As *Enterprising Young Singles* and *Urban Working Families* together account for 39% of market area households, their characteristics should be closely evaluated.

To provide a snapshot of the characteristics of all market area households, Exhibit S-6 on the following page summarizes the housing preferences and socioeconomic characteristics of the primary lifestyle groups within the market area as well as those groups within which the remainder of households fall.

Employment Trends

Nationwide

Following the nation's longest and most aggressive expansion in history, the U.S. economy's growth essentially halted in 2001 and was further weakened by the September 11 terrorist attacks. While there have been some signs of rebound, the economy continues to be unstable. In the first quarter of 2002, the Gross Domestic Product (GDP) increased by 5.0%, fell to 1.3% in the second

EXHIBIT S-6

HOUSEHOLDS BY LIFESTYLE GROUP AND TYPE
Market Area
2003

Lifestyle Group	Market Area Number	Market Area Percent of HHS	Socio-Econ Rank (1-40)	Housing Type	Household Type	Percent Living in Owner-Occupied Units	Median Age
Affluent Families	11,213	16.5%					
Upper Income Empty Nesters	503	0.7%	5	Single-Family	Married, No Children	87%	42.4
Successful Suburbanites	1,653	2.4%	2	Single-Family	Married w/Children	87%	37.1
Prosperous Baby Boomers	1,675	2.5%	6	Single-Family	Married w/Children	74%	31.1
Semirural Lifestyle	7,382	10.9%	7	Single-Family	Married w/Children	84%	36.8
Upscale Households	12,583	18.5%					
Baby Boomers with Children	8,814	13.0%	16	Single-Family	Married w/Children	69%	31.2
Older, Settled Married Couples	3,769	5.5%	15	Single-Family	Married Couples	81%	37.2
Up and Coming Singles	15,028	22.1%					
Enterprising, Young Singles	15,028	22.1%	9	Multi-Unit	Single Person	24%	30.1
Retirement Styles	2,957	4.3%					
Retirement Communities	2,019	3.0%	12	High-Rise Units	Single Person	49%	40.0
Active Senior Singles	467	0.7%	17	Multi-Unit	Single Person	43%	43.0
Prosperous Older Couples	471	0.7%	11	Single-Family	Married, No Children	81%	43.2
Young Mobile Adults	1,296	1.9%					
Twentysomethings	1,296	1.9%	27	Multi-Unit	Single Person	22%	30.0
City Dwellers	7,228	10.6%					
Working Class Families	3,429	5.0%	30	Single-Family	Family HH	69%	36.8
Newly Formed Households	1,996	2.9%	19	Single-Family	Family HH	53%	33.9
Low Income: Young and Old	1,803	2.7%	36	Duplex & Quad	Mixed Types	39%	31.8
Factory and Farm Communities	5,932	8.7%					
Young, Frequent Movers	2,563	3.8%	22	Mobile Homes	Married w/ Children	72%	33.0
Small Town Working Families	1,583	2.3%	24	Single-Family	Married Couples	66%	35.8
Rustbelt Neighborhoods	1,091	1.6%	26	Single-Family	Married Couples	68%	39.6
Heartland Communities	668	1.0%	31	Single-Family	Family Households	62%	41.0
Downtown Residents	11,754	17.3%					
Distressed Neighborhoods	361	0.5%	40	Garden Apartments	Single Person	17%	23.2
Urban Working Families	11,393	16.8%	35	Single Attached	Mixed Types	41%	29.4
Total	67,991	100.0%					

Source: ESRI BIS

quarter, rose to 4.0% in the third quarter, declined to 1.4% in the fourth quarter of 2002 and remained at 1.4% in the first quarter of 2003. The Selig Center for Economic Growth at the University of Georgia predicts that excluding another terrorist attack and a sharp increase in oil prices, the nation should be positioned for an economic recovery in 2004.

According to Selig Center estimates, total U.S. nonfarm employment is expected to increase by 0.8% in 2003 or by approximately 1.1 million jobs. Although there was a net gain in jobs in the second half of 2002, this gain was small. Companies will likely continue to maximize worker productivity as well as hire temporary help rather than hire new full time workers in 2003, which will weigh down job growth. Limited venture capital will also contribute to slow job growth.

Area Employment

The Selig Center predicts that the Atlanta MSA is will add 27,700 jobs to its employment base in 2003, increasing by 1.3%. Following a decade of impressive job growth, employment growth began to weaken in 2001. Continued weakness in the high tech, air transportation and hospitality sectors as well as expected slowing of commercial and residential development will prevent a full recovery in 2003. Despite these weaknesses, the Atlanta MSA remains an excellent choice for business to locate due to Hartsfield International Airport (the second busiest passenger airport in the world), a large pool of educated and talented workers, a diversified economy, several renowned academic institutions, continued, albeit slower, population growth and an excellent transportation system (e.g., interstate system, rail, transit, etc.). However, growing traffic congestion and sprawl threaten the desirability of the MSA.

Exhibit S-7

EMPLOYMENT BY INDUSTRY
Atlanta MSA
2001

Industry	2001 Employment	
	Number	Percent
Goods Producing	308,356	14%
Agriculture	*2,898*	0%
Mining	*1,611*	0%
Construction	*120,513*	6%
Manufacturing	*183,334*	9%
Service Producing	1,554,626	73%
Wholesale Trade	*143,041*	7%
Retail Trade	*253,956*	12%
Transportation & Warehousing	*107,847*	5%
Utilities	*10,362*	0%
Information	*109,325*	5%
Finance and Insurance	*101,830*	5%
Real Estate & Rental and Leasing	*38,295*	2%
Professional, Scientific	*145,990*	7%
Management	*58,565*	3%
Waste Management & Remediation	*158,419*	7%
Educational Services	*22,063*	1%
Health Care & Social Services	*155,139*	7%
Arts, Entertainment and Rec	*22,656*	1%
Accommodation & Food Services	*169,185*	8%
Other Services	*57,953*	3%
Government	272,406	13%
State	*52,535*	2%
Local	*172,577*	8%
Federal	*47,294*	2%
NEC	7,448	0%
TOTAL	2,142,836	100%

Note: Historical comparisons are not provided due to the fact that 2001 employment is segmented according to the North American Industrial Classification System (NAICS).

Source: Georgia Department of Labor

The Atlanta MSA has the largest economy among Georgia MSAs with an estimated 2,142,836 employees in 2001 (Exhibit S-7). Between 1996 and 2001, employment within the Atlanta MSA increased at an average annual rate of 2.9%. Service producing jobs accounted for the highest share of total employment in 2001 (73%). Within the service producing category, the wholesale and retail trade sectors held a 19% share of total employment in the Atlanta metro area in 2001. Other major employment sectors included accommodation and food services (8%), waste management and remediation services (7%) and health care and social services (7%). Manufacturing supplied 9% of total employment in 2001, the largest goods producing sector. The construction sector is also a valuable employer within the Atlanta metro area, generating 6% of total jobs. Government jobs accounted for 13% of the region's jobs in 2001, with the share of local government (8%) jobs surpassing state (2%) and federal government (2%) proportions.

Long term, the Atlanta Regional Commission predicts that the metro area will see vigorous population and job growth during the next thirty years. Population is projected to grow by 63% over the thirty-year period and jobs by 73%. Service jobs will continue to be a driving force in the region's economy.

Unemployment within the Atlanta MSA was above state levels in 2002 (5.3% compared to 5.1%), jumping from 3.5% in 2001. Unemployment within Fulton County was even higher in 2002, increasing to 6.4% from 4.3% in 2001.

Among Georgia counties, Fulton County ranked 1st in total employment in 2001 (754,028 employees) and 1st in wages ($919 average weekly wages). In the third quarter of 2002, the largest employers within the Atlanta MSA were: Cobb, DeKalb and Gwinnett County School Systems, Delta Airlines, Emory University, Home Depot, Kroger, Pubilx, the U.S. Postal Service and Wal-Mart Associates.

Employment within a one-mile and two-mile radius of the study area (defined as the intersection of Union Street and Watson Street) is displayed in Exhibit S-8 on the following page. Slightly more than 3,000 workers are employed within a one-mile radius in 307 businesses; 8,307 workers are employed within a two-mile radius by 611 businesses. Of the workers that are within one-mile from the study area, 39% are employed in the retail trade sector, primarily by eating and drinking establishments. The retail trade sector provides the greatest share of jobs within the two-mile area; however, auto dealers and gas stations are the largest employers within the sector. In terms of the number of businesses, service businesses within a one-mile radius of the study area outnumber retail trade businesses: 108 compared to 105.

EXHIBIT S-8

BUSINESSES AND EMPLOYMENT WITHIN A 1-MILE AND 2-MILE RADIUS FROM DOWNTOWN
2002

Industry	1-Mile Radius				2-Mile Radius			
	Businesses		Employees		Businesses		Employees	
	#	%	#	%	#	%	#	%
Agriculture & Mining	2	0.7%	8	0.3%	4	0.7%	14	0.2%
Construction	8	2.6%	182	5.9%	24	3.9%	316	3.8%
Manufacturing	12	3.9%	379	12.3%	23	3.8%	690	8.3%
Transportation, Communication, Utilities	13	4.2%	68	2.2%	23	3.8%	276	3.3%
Wholesale Trade	4	1.3%	63	2.0%	15	2.5%	168	2.0%
Finance, Insurance & Real Estate	30	9.8%	209	6.8%	62	10.1%	383	4.6%
Retail Trade								
Home Improvement & Mobile Homes	5	1.6%	9	0.3%	8	1.3%	26	0.3%
General Merchandise	3	1.0%	302	9.8%	7	1.1%	619	7.5%
Food	6	2.0%	69	2.2%	15	2.5%	217	2.6%
Auto Dealers & Gas Stations	17	5.5%	193	6.2%	39	6.4%	1,103	13.3%
Apparel & Accessories	13	4.2%	68	2.2%	22	3.6%	129	1.6%
Furniture & Home Furnishings	9	2.9%	52	1.7%	13	2.1%	75	0.9%
Eating & Drinking Establishments	24	7.8%	359	11.6%	47	7.7%	755	9.1%
Miscellaneous Retail	28	9.1%	156	5.0%	42	6.9%	219	2.6%
Subtotal	105	34.2%	1,208	39.1%	193	31.6%	3,143	37.8%
Services								
Personal	27	8.8%	97	3.1%	45	7.4%	187	2.3%
Business	9	2.9%	114	3.7%	21	3.4%	271	3.3%
Automotive Repair, Services, Parking	15	4.9%	85	2.7%	25	4.1%	124	1.5%
Miscellaneous Repair Services	5	1.6%	67	2.2%	5	0.8%	67	0.8%
Motion Picture	0	0.0%	0	0.0%	2	0.3%	21	0.3%
Amusement & Recreation	6	2.0%	48	1.6%	10	1.6%	131	1.6%
Health	12	3.9%	67	2.2%	25	4.1%	654	7.9%
Legal	5	1.6%	10	0.3%	7	1.1%	13	0.2%
Education	1	0.3%	85	2.7%	6	1.0%	324	3.9%
Social	8	2.6%	62	2.0%	12	2.0%	90	1.1%
Museums, Art Galleries, Botanical, Zoo	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Membership Organizations	11	3.6%	32	1.0%	22	3.6%	83	1.0%
Engineering, Accounting, Research, Mang't	7	2.3%	23	0.7%	9	1.5%	30	0.4%
Hotels and Lodging	2	0.7%	26	0.8%	5	0.8%	75	0.9%
Misc. Services	0	34.5%	0	0.0%	0	0.0%	0	0.0%
Subtotal	108	35.2%	716	23.2%	194	31.8%	2,070	24.9%
Public Administration	9	2.9%	149	4.8%	42	6.9%	1,040	12.5%
NonClassifiable Establishments	16	5.2%	109	3.5%	31	5.1%	207	2.5%
Total	307	100%	3,091	100%	611	100%	8,307	100%

Source: Claritas 2003

RETAIL PROFILE

Nationally, the retail sector remained relatively stable in 2002 despite economic uncertainty and continued layoffs. Demand for retail space in neighborhood and community centers increased throughout the year, resulting in positive net absorption of space. Reduced levels of construction – down 28% among neighborhood and community centers from 2001 – played a major role in boosting net absorption. Consequently, asking rents increased but were offset by attractive concession packages. Low interest rates have impacted retail demand as households that refinance or secure low monthly payments on their new homes can maintain prior spending activity despite a sluggish economy.

Experts expect nationwide retail starts and completions to decrease in 2003, which when combined with closures and postponed expansions, should help narrow vacancy rates and increase rents. By year-end, vacancy rates are expected to drop to 10.2%, with rents increasing by 1.5%. Although forecasts indicate a decline in retail starts and completions, neighborhood and community center completions should increase by 50% in 2003 after decreasing nearly 30% in 2002.

Within the Atlanta MSA, population and employment growth should help fuel demand for new retail space in 2003. In 2002, retail sales within the region increased by 3.5% despite a weakened economy. However, vacancy rates increased as new space was added to the region's inventory. By the end of 2003, vacancy rates should stabilize largely due to a drop in completions. Rents should increase slightly but continued concessions will offset much of this gain.

According to statistics published by Dorey Publishing and Information Services, a local commercial real estate database company, in its semi-annual *Dorey's Atlanta Retail Space Guide*, the metro Atlanta retail market contained some 142.9 million square feet of existing space as of the spring/summer of 2003. Dorey's reports approximately 13.4 million square feet of this inventory as available, reflective of an 11% vacancy rate.

Meanwhile, another 4.6 million square feet of space is under construction, according to Dorey. The bulk of this new space is in midtown (1.2 million square feet), the South Atlanta/Airport submarket (750,000 square feet) and the northeast Gwinnett County submarket (598,985 square feet).

As would be expected for a sprawling metro area, average rental rates vary widely among Atlanta's retail submarkets. The average rental rate quotes for the Atlanta metro area ranges from $9.38 to $12.48.

The metro Atlanta retail submarket within which Union City and vicinity are located is called the "I-85 South" market by Dorey. As of the spring/summer of 2003, according to Dorey the I-85 South submarket included just over 2.5 million square feet. Vacancy is reported at 18.9% with 477,330 square feet of available space. No new centers are reported as under construction in the I-85 South submarket.

To gain insight into the supply and quality of retail businesses in the immediate vicinity of the study area, as well as average rents and occupancy rates, Marketek conducted a survey of nearby shopping centers. While retail uses are extremely limited in downtown Union City, retail development is concentrated on Jonesboro Road and Shannon Parkway. Just a short drive from Union City, Old National Highway also hosts a variety of retail uses. Retail development on Jonesboro Road and Old National Highway is largely provided in a ubiquitous commercial strip center setting.

Shannon Mall, South Atlanta's only enclosed regional mall, is experiencing weakening sales and climbing vacancies. Despite recent renovations, Shannon Mall is only 68% occupied largely due to the loss of two of its anchors. The Mall at Newnan Crossing, located at I-85 and Bullsboro Drive in Newnan, is expected to open in 2004 and could present competition for Shannon Mall. However, developers of the Mall at Newnan Crossing have had to scale back their plans to build a 1.3 million square foot mall to 1.0 million square feet after being able to secure commitments for only three anchors as opposed to the originally intended five anchors. The growing popularity of open air power centers or town centers with grid systems will likely draw customers away from enclosed regional centers, especially older ones like Shannon Mall.

Among the seven shopping centers surveyed, only two were built within the last 10 years, one of which was demolished and rebuilt. The average year built among centers surveyed is 1986. The median occupancy rate of the seven shopping centers surveyed is 98%; the average occupancy rate is 92%, skewed by a 32% vacancy rate at Shannon Mall. Rental rates range from $8-$14.50/square foot. The following provides an overview of the each of the centers surveyed.

1. **Shannon Crossings Shopping Center**
   4550 Jonesboro Road
   Union City, Georgia

- GLA: 101,047 square feet
- Average Base Rent: $14.50/NNN
- Occupancy: 98%
- Anchors: 101,047 square feet
- Type: Neighborhood Shopping Center
- Number Vacancies: 1
- Anchor:
  - Kroger (57,036 square feet)
- Tenants:
  - Family Touch Cleaners
  - S.E. Wireless
  - First American Cash Advance
  - Party Store
  - Avenue Plus
  - South Fulton Dental Care
  - Peachtree Nails
  - China King restaurant

- – Direct Insurance
- – Executive Choice Barber Shop
- – Allstate Insurance
- – Cindy's Spa
- – Mattie B's Kitchen
- – Beauty Supply
- – Arrowhead Clinic
- – J.R. Cricket's
- – Vacancy (Athlete's Foot)
- – The General (outparcel)
- – Papa John's Pizza (outparcel)
- – Hollywood Video (outparcel)
- Year opened: 1998
- Comments: Located across the street from Shannon Mall.

2. **Shannon Square**
4720 Jonesboro Road
Union City, Georgia

- GLA: 181,924 square feet
- Type: Community Shopping Center
- Average Base Rent: $11-$12/NNN
- Occupancy: 98%
- Number of Vacancies: 2
- Anchors:
  - – Wal-Mart (81,922 square feet)
  - – Ingles (32,212 square feet)
- Tenants:
  - – USA Payday
  - – Hair n' Motion
  - – 7 Beauty Mart
  - – Sally Beauty Supply
  - – Fashion Cents
  - – Shoe Time
  - – Bealls Outlet
  - – Dollar Tree
  - – Orthodontist
  - – RAC Rent-a-Center
  - – Rophe Adult and Pediatric Medicine
  - – Plaza Garibaldi
  - – Future Communications
  - – H & R Block Tax preparation

- China Garden
- Esquire Insurance
- Tara Nails
- The Washing Well
- Sherman Williams Paints (outparcel)
- Captain D's (outparcel)
- Blockbuster Video (outparcel)
- Shoney's restaurant (outparcel)
- RBC Centura Bank (outparcel)

- Year Built: 1986

3. Shannon Market Shopping Center
6851 Shannon Parkway
Union City, Georgia

- GLA: 50,000 (square feet)
- Type: Neighborhood Shopping Center
- Average Base Rent: $10/square foot
- Occupancy: 99%
- Anchors:
  - Eckerd Drugs
  - Big Lots
- Tenants:
  - Advance America
  - Hallmark Cards
  - Advantage Rent a Car
  - HLS Tax Services
  - Model Nails
  - Krystal Fast Food (outparcel)
  - USA gas station (outparcel)
- Year Built:1976
- Comments: Older shopping center. Next to Shannon Square.

4. Shannon Southpark Mall
1000 Shannon Southpark
Union City, Georgia

- GLA: 764,740 square feet
- Type: Super Regional
- Occupancy: 68%
- Number of Vacancies: 26 non-anchor; 2 anchors

- Anchors:
  - Sears (150,031 square feet)
  - Rich's-Macy's (121,580 square feet)
- Tenants:

  Women's Apparel
  - Ashely Stewart
  - Bodyware for Women
  - Cato/Cato Plus
  - Claire's boutique
  - Express
  - Fast Forward
  - Lerner New York
  - Natasha's Boutique
  - Rainbow
  - Rave
  - Stylesetter

  Men's apparel
  - After Hours Formal Wear
  - Fast Forward
  - Gingiss Formalwear
  - Napoly
  - Sports Profile
  - Underground Station

  Shoes
  - Champs Sports
  - Finish Line
  - Foot Action USA
  - Foot Locker
  - Kid's Foot Locker
  - Payless Shoe Source

  Toys and Games
  - FYE Game Room
  - K&B Toys

  Specialty
  - Gabriella Kent Gifts
  - Social Expressions
  - Waldenbooks

Home Furnishings
- Bombay Company
- Unclaimed Freight

Health and Personal Services
- Atlanta Orthodontic Care Center
- GA State Driver's License Center
- General Nutrition Center
- Jolie Nails
- Kim's Beauty Supply
- LensCrafters
- Pearl Vision Express
- Regis Salons
- Shock Eye Group

Music and Electronics
- Radio Shack

Jewelry
- Diamond Castle
- Friedman's Jewelers
- Jewelers of Kismet
- Kay Jewelers
- Regal Jewelers
- Riyas Jewelry & Perfume
- Watches Unlimited
- Zales Jewelers

Athletic Wear
- Sports Profile

Restaurants
- American Deli
- Buffalo's Cafe
- Cajun Delight
- Chik-Fil-A
- Coffee Collection
- Great American Cookie Company
- Mandarin Express
- Oriental Grill
- Picadilly Cafeteria
- Roman Delight Pizza
- Tea Wraps
- Tokyo Express
- Wendy's

Specialty
- Wonder Dollar

- Year Opened: 1980

- Comments: Two anchors are vacant. Stores are vacant on every wing of the mall. Recent renovations have improved the ambiance of the mall.

5. **Main Street South Fulton Shopping Center**
   6025-6085 Old National Highway
   College Park, Georgia

- GLA: 127,449 square feet
- Average Base Rent: Smaller tenants: \$14-\$15/square foot
  Larger tenants: \$8-\$9 square foot
- Type: Community Shopping Center
- Occupancy: 99.9%
- Anchor:
  - Kroger
- Tenants:
  - Pizza Hut
  - Radio Shack
  - Advance America (cash advance)
  - Hair Creations (salon)
  - Shoe Show
  - Simply Fashions
  - Great Wall (Chinese food)
  - Full service Citizens Trust Bank (located inside Kroger)
  - Stolz Chiropractic Center
  - Household Finance Corp. (home mortgage)
  - GNC (vitamins)
  - H & R Block
  - World Fashion Beauty Supply
  - Heaven Sent Cafeteria
  - Christian World Sportswear
  - All State Insurance
  - Daisy Fresh Cleaners
  - Dollar Tree
  - Kidspot
  - Amazing Furnishings
  - BP gas station (outparcel)
  - Lucky 7 Beverage Mart (outparcel)
- Year built: The original mall was originally constructed in early 1970s, but it was demolished and rebuilt in June 1999.
- Notes: Attractive Kroger with full-service bank inside.

6. **Pineview Plaza**
Intersection of Old National Highway and Flat Shoals Road
College Park, Georgia

- GLA: 60,000 square feet
- Type: Unanchored Strip Center
- Average Base Rent: Normally $16.50/square foot but reduced to $12.50/square foot until sale is finalized.
- Occupancy: 96%
- Number of Vacancies: 1
- Tenants:
  – New Birth United Church of God, Inc.
  – M& M Co. (playground furniture)
  – Ideal Tropical Foods
  – Changing Heads Barber & Beauty
  – Concert Hall (former A&P)
  – 20 Grand Lounge and Dance Club
  – Martinizing Dry Cleaner
  – That Girl hair salon
  – Auto-Town Insurance Agency
  – Sound Lab (CDs, records, VHS)
  – Check Cashing
  – Century 21 Realty
  – Chevron gas station
  – Mrs. Winner's fast food
- Year Built: 1970s
- Comments: Aging shopping center. Presently under contract for sale, after which time the center would be redeveloped.

7. **Mission Square**
Shannon Parkway
Union City, Georgia

- GLA: 30,400 square feet
- Average Base Rent: $9.75-$11.25/square foot
- Type: Neighborhood Shopping Center
- Occupancy: 83%
- Number of Vacancies: 1
- Tenants:
  - Remax Connections
  - Arnold Prestige Insurance Agency
  - Deon's Studio 14 Salon (hair)
  - Omni Grade Computers
  - Legacy of Faith Ministry
  - AGP Graphics
  - Just For You Nail Salon
  - The Herb Shop
  - Highpoint Medical Center (adolescents and pediatrics)
  - JB Barber Shop
  - Hairstyles by Jean
  - Mindbenders Books and Information Center
  - DDI Tattoo and Body Piercing
  - Tailoring and Alterations
  - Homeowners (mortgages)
  - Julee Picture Frame & Braiding
  - South Metro Insurance
  - All-Star Fitness
  - Family Dentist
- Year Built: 1989

Despite growing population and affluence, South Fulton has remained under served by retailers, forcing many residents to travel northward for a better variety of goods and services resulting in millions of dollars flowing outside of the area each year.

In Fayette County, 1 million square foot Fayette Pavilion has several big boxes (e.g., Target) that draw consumers from the Union City area. Camp Creek Marketplace, located at I-285 and Camp Creek Parkway, is a major South Fulton project that is nearing completion of its first phase of development. Camp Creek Marketplace is a $125 million, 1.1 million square foot power center with such notable anchors as Target, Lowe's Home Improvement, BJ's Wholesale Club, Staples, Barnes & Noble, Marshall's, Ross Dress for Less, PetsMart, Linens 'n Things and Pier One. It is the first large scale retail development in South Fulton since the development of Greenbrier Mall in 1965. The developer of Camp Creek Marketplace – North American Properties – recognized the potential buying power of nearby residents with new subdivisions going up with homes priced at $300,000 and up and the lack of nearby quality retail. Average lease rates range from $26-$30/NNN (triple net). Combined with strong population growth and access to I-285, the development has been highly marketable to national retailers.

Although automobile oriented, Camp Creek Marketplace is attempting to differentiate itself from typical power centers by offering tree-lined sidewalks and a central gathering place. In cooperation with the developer, the cities of East Point and Atlanta successfully created a tax allocation district for the site, which entailed the sale of a $22 million bond to pay for the infrastructure for the project.

Phase I of the project is currently 100% leased and Phase II is currently underway which will host five additional retail anchors, a multi-screen movie theater, a health club, hotels, restaurants and small shop space. Camp Creek Marketplace has already spurred nearby development, including a 5 million square foot business park, a 475 mixed-use community (Princeton Lakes) and an 800-unit luxury apartment.

Another initiative that should impact the South Fulton retail market is a redevelopment plan currently underway for the area just south of the airport. Clayton County, Fulton County and College Park have joined forces to plan for the redevelopment of a 3,400-acre area termed "Southside Hartsfield" roughly bordered by I-285 to the north, I-85 to the west, Flat Shoals Road to the south and just past Riverdale Road to the east. The redevelopment plan concentrates neighborhood commercial development on Old National Highway, West Fayetteville Road and Riverdale Road, envisions a network of greenways connecting residential areas to jobs and shopping, limits industrial and distribution uses in the northeast corner, encourages office uses just south of I-285 and creates a hospitality district in the northwest corner. The remainder of the area would largely be comprised of residential uses, with higher density housing near office and commercial development and lower density housing further from the airport. Once the redevelopment plan is finalized this summer, each municipality is expected to approve a zoning overlay district to ensure consistency throughout the area.

RESIDENTIAL PROFILE

In addition to the statistical demand analysis, the supply-side of the rental and for-sale housing market in Union City is reviewed and analyzed including: total residential sales over the last year, characteristics and absorption histories of a sample of nearby active for-sale developments that are higher density (i.e. townhouses and cluster homes) and a survey of selected nearby rental apartment projects. While few of the existing for-sale or rental communities are truly comparable to mixed-use development that would be appropriate for the study area, the supply-side analysis provides insight into the strength of the overall housing market.

Housing Characteristics

In an effort to enhance the housing profile of the residential market area (i.e., the 15-minute drive area), selected housing data for the market area, the "approximate market area"[1] and Union City are provided as follows:

- Slightly over one-half (56%) of occupied housing units in the market area are owner-occupied and 44% are renter occupied. Within Union City, only 47% of occupied housing units are owner-occupied, far below 67% in the Atlanta MSA. Within the approximate market area, 57% of total occupied housing units were owner-occupied in 2000.

[1] The "approximate market area" is comprised of nine Zip Codes that generally reflect the 15-minue drive area.

- The estimated median value of specified owner-occupied units in the market area was $126,077 in 2003 (Exhibit H-1), compared to $98,857 in Union City and $155,789 in the Atlanta MSA. Within the market area, an estimated 60% of homes are valued between $50,000 and $149,999: 23% from $50,000-$99,999 and 37% from $100,000 and $149,000. An estimated 18% of owner-occupied homes are valued between $150,000 and $199,999. Thirteen percent (13%) of homes are valued at $200,000 to $399,999 and only 4% are valued at over $400,000.

Exhibit H-1

HOME VALUE OF SPECIFIED OWNER UNITS
Market Area
2003

Tenure	Housing Units	
	Number	Percent
Less than $50,000	1,712	4.5%
$50,000-$99,999	8,617	22.7%
$100,000-$149,999	14,168	37.3%
$150,000-$199.999	6,631	17.5%
$200,000-$299,999	4,343	11.4%
$300,000-$399,999	1,148	3.0%
$400,000-$499,999	636	1.7%
$500,000 and Above	694	1.8%
Total	37,949	100.0%
Median Home Value	$126,077	

Source: ERSI BIS

- Among owner-occupied homes in the approximate market area in 2000, 90% were single-family detached units, 3% were single-family attached units and 4% were mobile homes (Exhibit H-2 on the following page). Forty percent (40%) of renter occupied units in the approximate market area were low density (i.e., four units or less), 57% were medium to high density (i.e., 5 units or above) and 2% were mobile homes. Within Union City, 52% of owner-occupied units were single-family detached, 25% were single-family attached, 22% were in structures with 2 or more units and 1% were mobile homes. Renter units tended to be higher density in Union City compared to the approximate market area as 35% were low density and 64% were medium to high density.

- One- and two-person households were most popular in the approximate market area in 2000, accounting for 29% and 32% of owner-occupied units, respectively, and 41% and 29% of renter occupied units, respectively. Household size in Union City was more evenly distributed among one-, two-, three- and four bedroom households.

Exhibit H-2

TENURE BY TYPE OF UNIT
Union City and Approximate Market Area
2000

Unit Type	Union City		Approximate Market Area	
	Owner Occupied Units	Renter Occupied Units	Owner Occupied Units	Renter Occupied Units
1 Unit Detached	52%	7%	90%	16%
1 Unit Attached	25%	4%	3%	4%
2 Units	3%	6%	1%	6%
3 or 4 Units	10%	18%	1%	14%
5-9 Units	8%	27%	1%	25%
10-19 Units	1%	16%	0%	17%
20-49 Units	0%	3%	0%	5%
50+ Units	1%	18%	0%	10%
Mobile Home	1%	0%	4%	2%
Boat, RV, Van, etc.	0%	0%	0%	0%
Total	1,784	3,178	39,808	30,521

Source: 2000 Census

- According to the 2000 Census, housing development in the approximate market area was strongest in the 1970s and 1980s when more than one-half (51%) of all occupied housing units were built (Exhibit H-3). The same is true in Union City where 64% of occupied housing units were constructed. While housing development in both areas was slower in the 1990s, 16% of occupied housing units in the approximate market area were built in the 1990s, compared to 21% in Union City. However, as discussed later in this section, residential permitting activity and construction in Union City has rapidly increased since 2000.

Exhibit H-3

TENURE BY YEAR STRUCTURE BUILT
Union City and Approximate Market Area
2000

Unit Type	Union City		Approximate Market Area	
	Owner Occupied Units	Renter Occupied Units	Owner Occupied Units	Renter Occupied Units
Built 1999 to March 2000	0%	0%	2%	1%
Built 1995 to 1998	3%	8%	8%	4%
Built 1990 to 1994	8%	18%	9%	8%
Built 1980 to 1989	25%	38%	22%	25%
Built 1970 to 1979	39%	26%	26%	30%
Built 1960 to 1969	12%	6%	16%	17%
Built 1950 to 1959	6%	2%	8%	8%
Built 1940 to 1949	5%	1%	4%	3%
Built 1939 or Earlier	3%	1%	4%	3%
Total	1,784	3,178	39,808	30,521

Source: 2000 Census

Residential Market Trends

National

Despite the recent recession and the corresponding tightening of the labor market, the national housing market did exceptionally well in 2002. Low mortgage rates played a major role in a continued strong housing market, which are expected to remain below 7% in 2003. Low interest rates have had a direct impact on homeownership rates, as renters are finding that mortgage payments are increasingly comparable to rents – especially in the entry-level market.

Nationwide, single-family new home sales were up 7.5% from 2001 while existing home sales increased by 5.0%. Single-family permits, construction starts and completions were all up in 2002, reaching levels not experienced in decades. As a result, the National Association of Home Builders Housing Market Index shows that builders were more optimistic about the current and future outlook of the housing industry in 2002 compared to 2001.

Reis reports that 2002 was a difficult year for the national multifamily market. Low interest rates combined with high priced Class A apartment rents directed typical renters to home ownership. The national vacancy rate jumped to 6.3%, the highest level since 1991. For the second year, net absorption of rental units was negative (negative 9,400 units) which was partly fueled by existing renters opting for home ownership. Nationwide, construction completions moved ahead in 2002 despite slowing demand.

While rents increased by 0.4% in the fourth quarter of 2002 (1.1% for the year), high concessions offset this gain and actually resulted in a 0.2% drop in effective rents (-1.0% for the year). Nationwide, vacancy rates increased to 4%, still below the 5% threshold considered to reflect market equilibrium.

Reis anticipates that the current imbalance between demand and supply will continue to boost vacancy rates in 2003. Although net absorption is expected to return to positive territory by the end of 2003, new construction will lift the vacancy rate to 7.4%. Both asking rents and effective rents are expected to increase in 2003, by 1.8% and 0.9%, respectively. Over the next four years, Reis expects that the national rental market will stabilize as demand improves and construction activity slows.

Atlanta Region

Job losses, economic uncertainty and low mortgage rates have also impacted the Atlanta region's housing market. Within the for-sale market, sales of entry-level homes (priced below $250,000) have remained strong. Higher priced homes (especially those priced above $400,000) are staying on the market longer. Uncertainty over job security and the economy is deterring move-up buyers and even encouraging some homeowners to move-down. Higher priced homes will remain more difficult to sell until the labor market stabilizes and begins to show strong growth.

The Atlanta Journal/ Constitution's Annual Home Report shows that within 16 of the 20 Atlanta MSA counties, the number of sales of new and existing homes reached 117,281 in 2002 (down slightly from 118,348 in 2001) with median sales prices of new homes ranging between $127,250 (Newton County) to $254,400 (Forsyth County). Overall, home prices rose 5% throughout the metro area. Fulton County continued to lead the area in terms of sales volume while Rockdale County experienced the greatest increase in sales.

After years of defying national trends, the Atlanta region's apartment market experienced weakness in 2002. Increasing construction completions, low interest rates and job losses contributed to climbing vacancies and zero rent growth. Increasing scheduled completions in 2003 will likely further weaken the local apartment market.

In 2002, the average vacancy rate in the Atlanta MSA was 10.3%, up more than 250 basis points from 2001. Asking rents remained steady while effective rents dropped due to concessions. By the end of 2003, average asking rents in the Atlanta MSA are expected to decrease by 1% to $790, while effective rents will drop by 5% due to concessions being offered. Vacancy rates are expected to climb to 11.5% by year-end. As the job market rebounds, the apartment market will likely follow. However, a meaningful recovery is not anticipated until 2004.

Union City

Union City has experienced a significant increase in residential permitting activity and construction since 2000. Exhibit H-4 shows permitting and building activity in Union City over the past three years. A total of 3,534 units have been approved, more than one half of which (55%) are located in the western portion of the city. Certificates of Occupancy have been issued for 36% of permitted units, almost equally divided among projects in the central and

EXHIBIT H-4

PERMITTED AND APPROVED UNITS
Union City
2000 to May 2003

Status/Area	Permitted		Certificate of Occupancy Issued		Remaining Units	
	Number	Percent	Number	Percent	Number	Percent
Approved Units						
Central	935	26%	586	46%	349	15%
East	659	19%	3	0%	656	29%
West	1,940	55%	684	54%	1,256	56%
Subtotal	3,534	100%	1,273	100%	2,261	100%
Proposed Units						
Central	100	7%	~	~	100	7%
East	323	23%	~	~	323	23%
West	956	69%	~	~	956	69%
Subtotal	1,379	100%	~	~	1,379	100%
Total	4,913	~	1,273	26%	3,640	74%

Source: City Planning Department, Union City western portions of the city. In addition to the 2,261 permitted units that have not yet been built, 1,379 units have been proposed, mostly (69%) in the western portion of the city.

Much of Union City's new residential development has occurred along High Point Road, which until the late 1990s had limited development potential due to a closed road and bridge. New residential development on High Point Road includes single-family detached units on varying lot sizes, cluster homes, townhomes and patio homes. In an effort to better plan for future residential development, Union City has implemented a moratorium on residential rezoning and annexation applications.

For-Sale Housing Market

Exhibits H-5 displays residential sales data for Union City and South Fulton over the past year. Based on this information, the for-sale market appears to be centered in the $100,000 to $160,000 price range. Almost two thirds (65%) of

Exhibit H-5

MULTIPLE LISTING SALES
July 11, 2002 to July 11, 2003
Union City and South Fulton County

Sales Price	Union City			South Fulton		
	Units Sold		Days on	Units Sold		Days on
	Number	Percent	Market	Number	Percent	Market
Less than $10,000	0	0%	0	4	0%	51
$10,000-$19,999	3	2%	80	11	1%	149
$20,000-$29,999	0	0%	0	4	0%	85
$30,000-$39,999	2	1%	439	13	1%	119
$40,000-$49,999	3	2%	76	14	1%	77
$50,000-$59,999	5	3%	46	25	2%	116
$60,000-$69,999	8	5%	97	29	3%	95
$70,000-$79,999	8	5%	106	44	4%	94
$80,000-$89,999	7	4%	54	53	5%	83
$90,000-$99,999	3	2%	65	55	5%	81
$100,000-$119,999	39	23%	95	230	21%	86
$120,000-$159,999	70	42%	123	343	31%	92
$160,000-$199,999	16	10%	84	123	11%	150
$200,000-$249,999	1	1%	280	57	5%	138
$250,000-$299,999	1	1%	72	44	4%	93
$300,000-$349,999	0	0%	0	21	2%	127
$350,000-$399,999	0	0%	0	13	1%	184
$400,000-$499,999	0	0%	0	6	1%	178
$500,000-$599,999	1	1%	439	6	1%	144
$600,000-$699,999	0	0%	0	4	0%	182
$700,000-$799,999	0	0%	0	1	0%	172
$800,000-$899,999	0	0%	0	1	0%	14
$900,000-$999,999	0	0%	0	1	0%	525
$1,000,000 and Above	0	0%	0	2	0%	263
Total Units Sold	167			1,104		
Average Days on Market	109			182		
Median Sales Price	$124,167			$135,490		
Average Sales Price	$120,009			$206,417		

Source: Multiple Listing Service

sales in Union City were in the $100,000-$159,999 range. Twenty-three percent (23%) of the sales were in the $100,000-$119,999 range and 42% sold for $120,000 to $159,999. Only three homes sold for $200,000 or more.

The median sales price of the 167 home sold in Union City over the past year was $124,167 and the average sales price was $120,009. Sale prices tended to be slightly higher in South Fulton where the median sales price was $135,490 and the average sales price was $206,417. The average number of days on the market was 109 in Union City and 182 in South Fulton.

The Atlanta Journal/Constitution Annual Home Report shows that sales within the 30291 Zip Code, in which Union City located, increased by 2% from 2001 to 2002 to 415. The median sales price within this area was up 9% to $127,900.

The following summary of selected higher density projects shows that this type of product is selling at an average rate of 3 to 4 units per month. Prices range from the low $100s to $190,000.

1. **Ravenwood on Highpoint**
   Ravenwood Road, Union City
   - Developer: Choice Homes
   - Type: Cluster homes
   - Total Units: 551 planned for build-out. Phases I and II complete. Phase III (232 units) under construction, Phase IV planned
   - More than 100 units have been constructed during the last 3 years
   - Average sales per month: 3 units
   - Price range: $110,000 to $126,000
   - Size range: 1,073-1,860

2. **Valley Lakes**
   Highpoint Road, Union City
   - Developer: Torrey Homes
   - Total units: 300 planned for build out. 150 completed.
   - Average lot size: .25 acres
   - Average sales per month: 5 units
   - Price range: $157,000 to $190,000
   - Size range: 1,500-2,200
   - Amenities: Lake, pool, bath house, tot lot, gazebo

3. **Deer Creek**
   Lower Dixie Lake Road, Union City
   - Developer: Brayson Homes
   - Total units: 44
   - Average lot size: .25 acre
   - Average sales per month: 3 units
   - Price range: $146,000 to $165,000
   - Average size: 1,500 to 2,100 square feet

4. **The Villas of Highpoint**
   4418 Gladewood Road, Union City
   - Developer: Ridgeland Homes

- Total units: 45
- Average sold per month: 2.4 units
- Average lot size: 1/5 acre
- Price range: $120,000 to $130,000
- Size range: 1,500 to 1,900 square feet

5. **Lakeview Cluster Homes**
   Highpoint Road, Union City
   - Developer: Brayson Homes
   - Total Units: 154
   - Type: Townhomes
   - Status: Phase I and Phase II on market. 58 of 74 units sold in Phase I. 12 of 80 units sold in Phase II.
   - Average sold per month: 4 units
   - Price range: $129,000 to $138,000
   - Size range: 1,000 to 1,761 square feet

6. **Oakley Commons Townhomes**
   Oakley Road, Union City
   - Developer: Myer Sutton Homes
   - Total Units: 175 at build out
   - Status: First residents moved in January 2003
   - Price range: $101,000 to $115,000
   - Size range: 1,330 to 1,350
   - Sales rate not available

7. **Stone Ridge**
   Old National Highway, Riverdale
   - Developer: Tim Jones Communities
   - Total Units: 169
   - Type: Ranches, 2-story and split-levels
   - Status: Pre construction. Underway by August.
   - Contracts: 5 in 3 months
   - Price range: $135,000 to $160,000
   - Size range: 1,500 to 2,000 square feet
   - Average lot size: .33 acre
   - Privacy fences, swim and tennis

Rental Housing Market

To obtain an understanding of rents, sizes, occupancies, community/unit amenities of rental apartment projects in the Union City area, Marketek conducted a survey of nine nearby apartment projects in June-July 2003 which is presented in Exhibit H-6 on the following page and analyzed in this section. A map showing the locations of the projects surveyed follows Exhibit H-6 and photographs of each of the projects is attached in Appendix I.

The nine projects surveyed include a total of 1,851 units. The average (weighted) occupancy rate of the nine projects surveyed was 90%, with only three projects experiencing occupancy rates of 95% or higher. An occupancy rate of 95% or higher indicates that unit demand and supply are in equilibrium.

Exhibit H-6

SUMMARY CHARACTERISTICS OF SELECTED APARTMENT COMMUNITIES

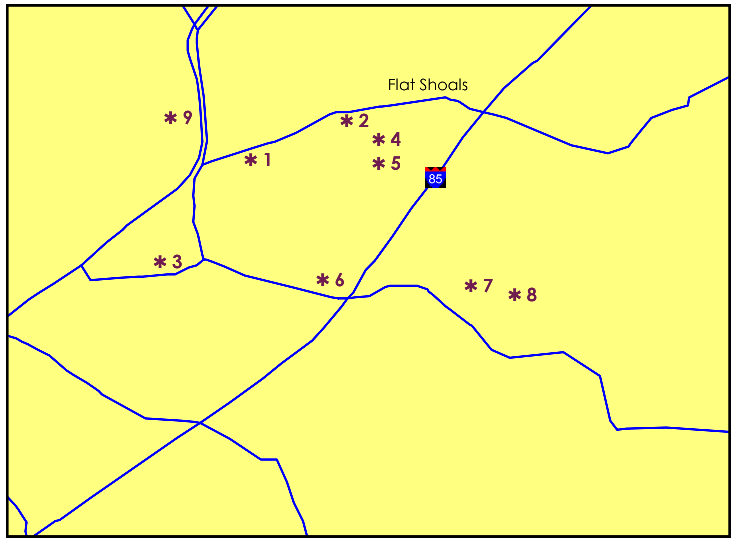
Site	Units/ Mix	Rent Low	Rent High	Square Feet Low	Square Feet High	Rent/ Sq. Ft.	Deposit	Structure Type	Occ Rate	Year Built	A	B	CL	C	FC	L	P	PL	WD	WDC	Comments
1 Autumn Hills	191							2 story	99%	1989		X	X	X	X		X			X	25% of units are tax
Efficiencies	0	NA	NA	NA	NA	NA	NA	flats &													credit; remaining are
One Bedroom	32	$580	$580	730	730	$0.79	$200	TH													market rate. Couples,
Two Bedroom	159	$700	$750	1,145	1,185	$0.62	$300														starter families,
Three Bedroom	0				NA																young roommates.
2 Union Station	450							2-3 story	84%	1990	X	X	X	X	X	X	X			X	Well landscaped.
Efficiences	0	NA	NA	NA	NA	NA	NA	flats													
One Bedroom	169	$600	$690	850	850	$0.76	$350														
Two Bedroom	225	$700	$800	1,125	1,125	$0.67	$350														
Three Bedroom	56	$850	$950	1,175	1,250	$0.74	$350														
3 Autumn Meadows	56							2-story	100%	1988		X		X	X	X	X	X		X	Elderly, single mothers,
Efficiencies	0	NA	NA	NA	NA	NA	NA	flats &													couples.
One Bedroom	8	$590	$590	900	900	$0.66	$100	TH													
Two Bedroom	48	$650	$680	1,000	1,200	$0.60	$250														
Three Bedroom	0	NA	NA	NA	NA	NA	NA														
4 Shannon Creste	200							2-3 story	90%	1989		X	X	X			X	X		X	All vacancies are
Efficiences	0	NA	NA	NA	NA			flats													2-bedroom. Elderly
One Bedroom	0	NA	NA	NA	NA	NA	NA														couples and families.
Two Bedroom	80	$670	$670	1,016	1,016	$0.66	$250														100% tax credit.
Three Bedroom	80	$775	$775	1,214	1,214	$0.64	$250														
Four Bedroom	40	$955	$955	1,445	1,445	$0.66	$300														
5 Oakley Shoals	86							1- story	87%	1988		X		X		X					Under renovation.
Efficiencies	11	$479	$479	340	340	$1.41	$250	flat													
One Bedroom	57	$545	$545	540	540	$1.01	$250														
Two Bedroom	18	$700	$700	860	860	$0.81	$250														
Three Bedroom	0	NA	NA	NA	NA	NA	NA														
6 Champions Glen	166							2-3 story	95%	1990	X	X	X	X	X		X	X	X		Mostly families in
Efficiences	0	NA	NA	NA	NA	NA	NA	flat													3-bedrooms; singles
One Bedroom	26	$650	$680	800	800	$0.83	$150														and starter famiies
Two Bedroom	83	$735	$745	1,000	1,100	$0.70	$150														in 2-bedroom units.
Three Bedroom	57	$750	$750	1,275	1,275	$0.59	$150														
7 Hidden Lake	320							2-3 story	92%	1986		X	X	X	X	X	X	X		X	Lots of famiies with
Efficiences	0	NA	NA	NA	NA	NA	NA	flat													small children.
One Bedroom	112	$609	$800	708	1,141	$0.76	$350														
Two Bedroom	196	$709	$759	932	1,188	$0.69	$350														
Three Bedroom	12	$859	$859	1,269	1,269	$0.68	$350														
8 Shannon Lake	294							2-3 story	89%	1984		X	X	X			X			X	On a lake with a
Efficiences	NA	NA	NA	NA	NA	NA	NA	flat													gazebo. Elderly, family,
One Bedroom	NA	$610	$670	712	808	$0.84															singles. 50% tax credit;
Two Bedroom	NA	$725	$795	1,027	1,185	$0.69															50% market rate.
Three Bedroom	NA	$810	$870	1,208	1,285	$0.67															
9 Premiere Club	88						$350	2-story	90%	1973		X	X	X		X	X				Residents are mostly
Efficiences	0	NA	NA	NA	NA	NA	NA	flat													retired.
One Bedroom	88	$450	$450	500	500	$0.90	$350														
Two Bedroom	0	NA	NA	NA	NA	NA	NA														
Three Bedroom	0	NA	NA	NA	NA	NA	NA														
TOTAL	1,851							~	90%	1987											
Efficiences	11	$479		340		$1.41	$250														
One Bedroom	492	$608		759		$0.80	$314														
Two Bedroom	809	$726		1,091		$0.67	$302														
Three Bedroom	205	$807		1,234		$0.65	$255														
Four Bedroom	40	$955		1,445		$0.66	$300														

A: Alarm System C: Cable Ready G: Gas P: Pool W: Water WD: Washer & Dryer
B: Balcony/Patio FC: Fitness Center L: Laundry Room on Site PL: Playground TH: Townhouse WDC: Washer & Dryer Connections

Note: Projects for which the mix was unavailable are not accounted for in average rents, square footage and value ratios but are included in total units, occupancy rates and years old.

Source: Marketek, Inc. June-July 2003

Competitive Apartment Communities



The apartment communities surveyed are generally older. The average age of all projects surveyed is 16 years. Only two of the projects surveyed (Union Station and Champions Glen) were built since 1990. All but one of the remaining projects surveyed were built in the 1980s, demonstrating that a limited amount of new product has entered the area in recent years.

Among the apartment communities surveyed for which the unit mixes were available, two bedroom units are the dominant unit type, accounting for 44% of units with an average monthly rent of $726 and an average of 1,091 square feet in size. One bedroom units are the second most prevalent (27%), with an average monthly rent of $608 and an average of 759 square feet in size. Three bedroom units account for 11% of units in projects surveyed for which mixes were available, with rents averaging $807 and unit sizes of 1,234 square feet. Only one of the projects surveyed offers efficiency units (rents of $479 and 340 square feet in size) and only one project offers four bedroom units ($955 rents and 1,445 square feet in size). Value ratios for efficiencies, one, two, three and four bedrooms are $1.41, $0.80, $0.67, $0.65 and $0.66 per month respectively.

A portion or all of the units at three of the projects surveyed are reserved for households who qualify for the Low Income Housing Tax Credit Program. All three of the projects were built prior to 1990 and occupancy rates range from 89% to 99%.

Unit features and project amenities present in the communities surveyed generally include full kitchen with dishwasher, balcony or patio, cable-ready, pool, clubhouse and on-site laundry. Upgrade features and amenities include: washer/dryer in unit, playground and fitness center.

Renter profiles obtained from interviews with managers and on-site leasing agents confirm that while there is a mix of prospective tenants at the communities surveyed, tenants are typically young families with children (one and two parent households), retirees and young singles.

Despite strong residential development activity in Union City, only one apartment community has been permitted since 2000. Wyndsor Forest will be a 328-unit project located on Highway 138, 1.5 miles west of I-85. Phase I of Wyndsor Forest (258 units) is complete and Phase II is under construction. Wyndsor Forest offers one, two and three bedroom units with average rents of $690, $835 and $970, respectively and unit sizes of 806, 1,162 and 1435 square feet, respectively (value ratios of $0.86, $0.72 and $0.68, respectively). Amenities include a pool, a fitness center and a controlled access gate. Although the project opened two years ago, management reports "there are still plenty of vacancies." At present, there are no other apartment projects planned in Union City.

1. **Autumn Hills**

2. **Union Station**

3. **Autumn Meadows**

4. Shannon Creste

5. Oakley Shores

6. Champions Glen

7. **Hidden Lake**

8. **Shannon Lake**

9. **Premiere Club**

RETAIL MARKET ANALYSIS

The study area's revitalization program is intended to enhance its position as a commercial center in Union City for retail market area residents. This section provides estimates of market support for retail uses in both the retail market area and in the study area. The retail market area designated for this research, as shown in the Demographic Overview, is based on drive time estimates from the study area and research regarding where existing and potential customers of study area businesses originate.

Retail Sales Potential and Supportable Space

The methodology for estimating statistical market support for retail space in the market area is displayed in Exhibits RD-2 through RD-5. This methodology applies expenditure potential[1] by type of merchandise to market area population figures in order to obtain potential sales volume for market area residents. Potential sales are divided among six merchandise and service categories: *shoppers goods, convenience goods, food & beverages, automotive products, personal services* and *other retail expenditures*. Exhibit RD-1 specifies the types of goods and services within several of these categories. For instance, "apparel" includes women's apparel, men's apparel, children's/infant's apparel, footwear, watches and jewelry.

Exhibit RD-1

SUMMARY OF MERCHANDISE AND SERVICE CATEGORIES

Merchandise/Service Category	Types of Goods/Services
Apparel	Women's Apparel, Men's Apparel, Children's/Infant's, Footwear, Watches & Jewelry
Home Furnishings	Furniture, Floor Coverings, Major and Small Appliances, Household Textiles, Floor Coverings, PC Software and Hardware, Housewares, Dinnerware, Glassware, Lighting
Misc. Specialty Retail	Pet Care, Books & Periodicals, Sporting Equipment, Toys & Hobbies, Video Cassettes & Games, TV/VCR/Cameras, Audio Equipment
Food & Beverages	Food Away From Home, Alcoholic Beverages
Automotive Products	Gasoline, Motor Oil & Auto Fluids, Tires, Accessories, Parts & Equipment, Repair
Personal Services	Personal Care Services, Shoe Repair, Video Rental, Laundry & Dry Cleaning, Alterations, Clothing Rental & Storage, Watch & Jewelry Repair, Photo Processing & Supplies

Source: ESRI BIS

Estimates of sales per square foot of store space derived from the Urban Land Institute's *Dollars and Cents of Shopping Centers* are used to convert

[1] Consumer spending is estimated from the Bureau of Labor Statistics' Consumer Expenditure (CEX) Surveys. The CEX surveys have been used for over a century to provide data to study consumer spending and its effect on gross domestic product.

adjusted potential sales to supportable space estimates. In Exhibit RD-2, for example, in the case of apparel, potential sales of $188,993,750 at sales per square foot of $194 will support 974,195 square feet devoted to this type of merchandise.

Exhibit RD-2 shows that in 2003, there was the potential for approximately 6.4 million square feet of retail space based on potential expenditures of residents who reside in the retail market area. That is, market area residents have the potential to generate sales demand that will support 6.4 million square feet of retail space. However, these potential expenditures by residents may occur outside of the market area if desirable goods and services are not offered within the market area.

Exhibit RD-3 displays projected retail expenditure potential for the market area for the year 2008. Based on population growth and subsequent increases in retail sales for the years 2003-2008, total supportable retail space in the market area will have increased to 7.4 million square feet by the year 2008.

Exhibit RD-2

RETAIL EXPENDITURE POTENTIAL
Retail Market Area
2003

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales ($/sq.ft.)	Potential Supportable Space(Sq. Ft.)
Apparel	$2,749	$188,993,750	$194	974,195
Home Furnishings	$2,243	$154,206,250	$189	815,906
Home Improvement	$725	$49,843,750	$199	250,471
Misc. Specialty Retail	$2,476	$170,225,000	$179	950,978
Shoppers Goods		**$563,268,750**		**2,991,549**
Grocery	$4,517	$310,543,750	$375	828,117
Health & Personal Care	$701	$48,193,750	$319	151,078
Convenience Goods		**$358,737,500**		**979,194**
Food & Beverages	$3,340	**$229,625,000**	$227	**1,011,564**
Automotive Aftermart	$2,627	**$180,606,250**	$231	**781,845**
Personal Services	$766	**$52,662,500**	$136	**387,224**
Misc Retail Expenditures	$700	**$48,125,000**	$201	**239,428**
Total		**$1,433,025,000**		**6,390,805**

Potential Supportable Retail Space **6,390,805**

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

Exhibit RD-3

RETAIL EXPENDITURE POTENTIAL
Retail Market Area
2008

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales ($/sq.ft.)	Potential Supportable Space(Sq. Ft.)
Apparel	$2,749	$217,871,995	$194	1,123,052
Home Furnishings	$2,243	$177,768,965	$189	940,577
Home Improvement	$725	$57,459,875	$199	288,743
Misc. Specialty Retail	$2,476	$196,235,380	$179	1,096,287
Shoppers Goods		**$649,336,215**		**3,448,658**
Grocery	$4,517	$357,994,835	$375	954,653
Health & Personal Care	$701	$55,557,755	$319	174,162
Convenience Goods		**$413,552,590**		**1,128,815**
Food & Beverages	$3,340	**$264,711,700**	$227	**1,166,131**
Automotive Aftermart	$2,627	**$208,202,885**	$231	**901,311**
Personal Services	$766	**$60,709,330**	$136	**446,392**
Misc Retail Expenditures	$700	**$55,478,500**	$201	**276,012**
Total		**$1,651,991,220**		**7,367,320**

Potential Supportable Retail Space **7,367,320**

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

Exhibit RD-4

RETAIL EXPENDITURE POTENTIAL
Retail Market Area
2013

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales ($/sq.ft.)	Potential Supportable Space(Sq. Ft.)
Apparel	$2,749	$251,162,385	$194	1,294,651
Home Furnishings	$2,243	$204,931,695	$189	1,084,295
Home Improvement	$725	$66,239,625	$199	332,862
Misc. Specialty Retail	$2,476	$226,219,740	$179	1,263,797
Shoppers Goods		**$748,553,445**		**3,975,606**
Grocery	$4,517	$412,695,705	$375	1,100,522
Health & Personal Care	$701	$64,046,865	$319	200,774
Convenience Goods		**$476,742,570**		**1,301,296**
Food & Beverages	$3,340	**$305,159,100**	$227	**1,344,313**
Automotive Aftermart	$2,627	**$240,015,855**	$231	**1,039,030**
Personal Services	$766	**$69,985,590**	$136	**514,600**
Misc Retail Expenditures	$700	**$63,955,500**	$201	**318,187**
Total		**$1,904,412,060**		**8,493,031**

Potential Supportable Retail Space **8,493,031**

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

Exhibit RD-5

POTENTIAL SUPPORTABLE RETAIL SPACE
Retail Market Area
2003-2013

Merchandise or Service Category	2003	2008			2013			Total Study Area Capture
	Retail Trade Area	Retail Trade Area	Numeric Increase	Study Area Capture	Retail Trade Area	Numeric Increase	Study Area Capture	
Shoppers Goods								
Apparel				8%			10%	
Potential Sales	$188,993,750	$217,871,995	$28,878,245	$1,721,349	$251,162,385	$33,290,390	$2,480,431	$4,201,780
Supportable SF	974,195	1,123,052	148,857	8,873	1,294,651	171,600	12,786	21,659
Home/Furniture								
Potential Sales	$154,206,250	$177,768,965	$23,562,715	$1,885,017	$204,931,695	$27,162,730	$2,716,273	$4,601,290
Supportable SF	815,906	940,577	124,670	9,974	1,084,295	143,718	14,372	24,345
Home Improvement								
Potential Sales	$49,843,750	$57,459,875	$7,616,125	$757,394	$66,239,625	$8,779,750	$1,091,390	$1,848,783
Supportable SF	250,471	288,743	38,272	3,806	332,862	44,119	5,484	9,290
Misc. Retail								
Potential Sales	$170,225,000	$196,235,380	$26,010,380	$2,080,830	$226,219,740	$29,984,360	$2,998,436	$5,079,266
Supportable SF	950,978	1,096,287	145,309	11,625	1,263,797	167,510	16,751	28,376
Total								
Potential Sales	$563,268,750	$649,336,215	$86,067,465	$6,444,591	$748,553,445	$99,217,230	$9,286,529	$15,731,120
Supportable SF	2,991,549	3,448,658	457,109	34,277	3,975,606	526,948	49,393	83,670
Convenience Goods								
Grocery				11%			13%	
Potential Sales	$310,543,750	$357,994,835	$47,451,085	$5,219,619	$412,695,705	$54,700,870	$7,111,113	$12,330,732
Supportable SF	828,117	954,653	126,536	13,919	1,100,522	145,869	18,963	32,882
Health & Personal Care								
Potential Sales	$48,193,750	$55,557,755	$7,364,005	$810,041	$64,046,865	$8,489,110	$1,103,584	$1,913,625
Supportable SF	151,078	174,162	23,085	2,539	200,774	26,612	3,460	5,999
Total								
Potential Sales	$358,737,500	$413,552,590	$54,815,090	$6,029,660	$476,742,570	$63,189,980	$8,214,697	$14,244,357
Supportable SF	979,194	1,128,815	149,621	16,458	1,301,296	172,481	22,422	38,881
Food & Beverages								
				10%			11%	
Potential Sales	$229,625,000	$264,711,700	$35,086,700	$3,508,670	$305,159,100	$40,447,400	$4,449,214	$7,957,884
Supportable SF	1,011,564	1,166,131	154,567	15,457	1,344,313	178,182	19,600	35,057
Automotive Aftermart								
				8%			8%	
Potential Sales	$180,606,250	$208,202,885	$27,596,635	$2,207,731	$240,015,855	$31,812,970	$2,545,038	$4,752,768
Supportable SF	781,845	901,311	119,466	9,557	1,039,030	137,718	11,017	20,575
Personal Services								
				11%			13%	
Potential Sales	$52,662,500	$60,709,330	$8,046,830	$885,151	$69,985,590	$9,276,260	$1,205,914	$2,091,065
Supportable SF	387,224	446,392	59,168	6,508	514,600	68,208	8,867	15,375
Misc Retail Expenditures								
				10%			10%	
Potential Sales	$48,125,000	$55,478,500	$7,353,500	$735,350	$63,955,500	$8,477,000	$847,700	$1,583,050
Supportable SF	239,428	276,012	36,585	3,658	318,187	42,174	4,217	7,876
Total								
Potential Sales	$1,433,025,000	$1,651,991,220	$218,966,220	$19,811,153	$1,904,412,060	$252,420,840	$26,549,092	$46,360,245
Supportable SF	6,390,805	7,367,320	976,515	85,917	8,493,031	1,125,711	115,517	201,434

Note: This exhibit represents the estimated potential demand for new retail sales and space in the retail market area in the years 2008 and 2013. This potential demand estimate is based on the projected expenditure potential of retail market area households by type of merchandise or service.

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

Exhibit RD-4 provides the same type of analysis for the year 2013 when supportable space will have increased to approximately 8.5 million square feet.

Exhibit RD-5 on the previous page distributes increases in sales and supportable retail space among the various retail categories for the years 2003, 2008 and 2013. Exhibit RD-5 also provides an estimate of the study area's capture of the increase in potential sales and demand for space for the years 2008 and for 2013.

Based on this analysis, sales by market area retailers of selected *shoppers goods* have a potential to reach $563 million in 2003, $649 million by 2008 and $749 million by 2013. In 2003, this sales level would support 3.0 million square feet devoted to *shoppers goods*. By 2008, supportable space for *shoppers goods* is projected to reach 3.4 million square feet of space, and by 2013, supportable space will potentially have increased to 4.0 million square feet.

Utilizing the assumption that the majority of space devoted to *shoppers goods* will continue to be concentrated in the major shopping centers and commercial strip development located in the market area, the study area's projected capture of the potential increase in total market area demand for *shoppers goods* during the study period 2003-2013 is conservative. The projection shows that the study area has the potential to capture 8% of the increase in total sales generated by market area residents by 2008 and an additional 10% by 2013. The study area's capture rates for *shoppers goods* and other retail categories are primarily based on Marketek's experience in similar shopping districts throughout the nation (i.e., the proportion of sales comparable shopping districts have been able to capture), the study area's current retail potential relative to the market area and the study area's competitive advantages once redeveloped.

Based on these capture rates, the study area has the potential of drawing <u>an additional</u> $6.4 million in *shoppers goods* sales by 2008 and $9.3 million by 2013. These increases in sales translate into 34,277 square feet of supportable retail space by 2008 and an additional 49,393 square feet by 2013. Examples of *shoppers goods* that would appeal to the target markets of area employees, residents and visiting metro residents/Southside hotel and motel guests include: books, card/stationery/gifts, camera equipment, electronics, sporting goods, jewelry, shoes and men's, women's and children's/infant's apparel.

The primary target market for *convenience goods* in the study area will be nearby residents as consumers are typically unwilling to travel far from home for most convenience goods and services. Seventeen percent (17%) of market area residents live within a seven-minute drive of the study area, the primary market for convenience businesses. By 2008, Exhibit RD-5 estimates that the study area should be able to capture at least 11% of the market area's potential increase in convenience store sales to produce additional sales of approximately $6.0 million or demand for 16,458 square feet of additional convenience store space. By the year

2013, additional sales of $8.2 million or approximately 22,422 square feet of new convenience store space is potentially supportable in the study area.

Primary target markets for restaurants and other eating places (which fall within the *food & beverages* category) are market area residents and people who work in area. By 2008, the study area should be able to capture at least 10% of the increase in the sales of *food & beverages* in the market area resulting in additional demand of approximately 15,457 square feet of such space in the study area.

By the year 2013, the study area should be able to expand its offering of *food & beverage* businesses that will result in an increase of $4.4 million in sales or demand for 19,600 square feet of additional space. This sales level represents 11% of the increase in total market area potential demand for *food & beverage* businesses from 2008 to 2013. This is based upon the assumption that by the year 2013, the study area should have established itself as an expanded mixed-use commercial center with a wide variety of specialty shopping, entertainment, restaurants, new housing and office uses.

The study area has the potential to capture 8% of the market area's *automotive aftermart* sales in 2008 and 2013, translating into sales of $2.2 million in 2008 and $2.5 million in 2013. The increase in potential sales of *automotive products* will support an additional 9,557 square feet of space in 2008 and another 11,017 square feet in 2013.

The increase in *personal services* sales for the market area is projected at $8.0 million by the year 2008, increasing by an additional $9.3 million by the year 2013. Similar to *convenience goods*, the primary market for *personal services* will be nearby residents. A 11% capture of increased sales for the market area would justify an increase of 6,508 square feet of space devoted to *personal services* by the year 2008. Based on a 13% capture by the year 2013, support for personal services space in the study area will have increased by another 8,867 square feet.

The types of *personal services* that might be considered in the retail mix include: laundry/dry cleaners, beauty/barber shops, repair shops for shoes and film processing. Types of services that will be in demand by area employees and residents of the surrounding neighborhoods might include: banks and financial services, shipping/packing service and copy center.

Exhibit RD-5 shows that the study area should be able to capture 10% of *other retail sales* within the market area in 2008 and 2013, which would result in 3,658 square feet of retail space in 2008 and 4,217 square feet of space in 2013.

The estimate for new potential demand for retail space in the study area should be considered conservative based on the fact that expenditures of two key target markets – employee and metro area visitor/Southside hotel and motel guests – are not factored into the estimate. As discussed in the Demographic Profile, more than 8,300 employees work within a two-mile radius of the study area.

It is our opinion that with aggressive marketing and various types of incentives, new retail businesses that choose to locate in the study area will be willing to pay lease rates comparable to those paid by tenants in more successful shopping centers throughout the market area. Experience has shown that successful "town center" developments tend to have market areas beyond those of conventional retail developments and as they mature, rents and land prices (retail, office and residential) also escalate.

Retail Spending Activity

The Spending Potential Index (SPI) is a measure of market activity developed by ESRI Business Information Solutions and denotes actual dollars *spent* on certain goods and services. When the SPI is equal to 100 for a specific type of merchandise, consumers are buying or spending at a rate equal to the national average. A SPI greater than 100 indicates that consumers are buying or spending above the national average. In other words, the SPI is an indicator of what prices consumers will pay and/or the level of their discretionary income they are willing to devote to a particular good or service. Exhibit RD-6 on the following page shows the SPI of market area households.

Overall, the data presented in Exhibit RD-6 demonstrate that consumers within the retail market area buy most of the goods and services displayed at a rate below the national average. This phenomenon is likely a result of the fact that household income levels throughout the retail market area are generally moderate and, consequently, households have less money available for shopping. Also, a below average SPI can be partially attributed to big-box discount stores throughout the Atlanta area that allow residents to comparison shop to find the "best deal."

Although retail market area households generally spend less for the goods and services displayed in Exhibit RD-6, spending is closest to the national average for all types apparel (SPI=98): men's and women apparel (SPI=95 and 96), children's/infant's apparel (SPI=101), watches & jewelry (SPI=100) and footwear (SPI=99). Other types of goods and services for which market area households spend slightly below or above the national average include child care (SPI=106), video rental (SPI=98), luggage (SPI=94), games & toys (SPI=95), furniture (SPI=95), television & video equipment (SPI=95), music equipment & accessories (SPI=94), theater & movies (SPI=95), sporting events (SPI=96), restaurants (SPI=94), paint (SPI=94), home and auto loans (SPI=95 and 96), computer information services (SPI=97) and software (SPI=94).

It is important to note that while spending is below average for the various types of goods and services listed in Exhibit RD-6, retail market area consumers demand an array of goods and services – on the whole they just tend to pay less for them. Therefore, moderately priced goods and services would likely be most attractive to these households.

Exhibit RD-6

SPENDING POTENTIAL INDEX OF SELECTED GOODS AND SERVICES
Retail Market Area

Merchandise/ Service Category	Spending Potential Index
Apparel	98
Men's	95
Women's	96
Children's	101
Infant's	101
Footwear	99
Watches & Jewelry	100
Other Apparel	98
Automotive Aftermart	93
Automotive Maintenance & Repair	94
Gasoline and Motor Oil	92
Books & Periodicals	90
Cameras & Equipment	92
Child Care	106
Computer	
Computer Information Services	97
Personal Computer Software	94
Entertainment	
Entertainment Fees & Admissions	94
Membership Fees	91
Sporting Events	96
Sports Participation	93
Theater/Movies	95
Recreational Lessons	96
Video Rental	98
Film Processing	92
Games and Toys	95
Food & Beverages	
Groceries	93
Bakery & Cereal Products	92
Meats, Poultry, Fish & Eggs	95
Dairy Products	91
Fruits & Vegetables	92
Other Foods at Home	92
Meals at Restaurants	94
Alcoholic Beverages	94
Nonalcoholic Beverages	92

Merchandise/ Service Category	Spending Potential Index
Financial Services	
Auto Loans	96
Home Loans	95
Investments	88
Home	
Home Improvement	89
Maintenance & Repair	89
Repair Materials	87
Housekeeping Services	90
Household Furnishings	93
Household Textiles	93
Furniture	95
Major Appliances	92
Other Household Furnishings	93
Insurance	
Homeowners/Renters	89
Vehicle	94
Life	94
Health	88
Lawn & Garden	89
Luggage	94
Moving & Storage	93
Optical Goods	91
Paint	94
Pets & Supplies	90
Sporting Goods	93
Telephone Services	96
Television & Sound Equipment	94
Television and Video Equipment	95
Music Equipment/Accessories	94
Cable Television	94
Rental & Repair of TV/Sound	94
Travel	
Air Fare	90
Hotels/Motels	90
Rental Cars	94
Food/Drink	90

Source: ESRI BIS

Retail Purchasing Activity by Lifestyle Group

While SPI is a measure of spending activity, the Purchase Potential Index (PPI) measures consumer's tendency to *buy* certain goods and services. In other words, the PPI indicates that there is higher (PPI>100) or lower (PPI<100) than average demand for a product or service. Exhibit RD-7 on the following page displays the PPI for various types of merchandise among the primary lifestyle groups within the retail market area. The data displayed in Exhibit RD-7 should be used to gauge the types of businesses that would appeal to certain markets in the retail market area – e.g., *Enterprising Young Singles* versus *Baby Boomers with Children*. While the

Exhibit RD-7

PURCHASE POTENTIAL INDEX OF SELECTED GOODS AND SERVICES AMONG PRIMARY LIFESTYLE GROUPS

Merchandise or Service Category	Primary Lifestyle Groups			
	Enterprising Young Singles	Urban Working Families	Baby Boomers w/ Children	Semirural Lifestyle
Apparel				
Purchased women's apparel	104	90	103	106
Purchased men's apparel	102	86	102	107
Purchased adult dress shoes	119	98	103	114
Purchased adult casual shoes	116	89	98	121
Purchased adult athletic shoes	104	100	105	106
Purchased children's apparel: 1-5 yrs	87	125	103	101
Purchased children's apparel: 6-12 yrs	73	94	114	111
Purchased fine jewelry	110	71	104	121
Purchased costume jewelry	94	72	103	116
Purchased watch	115	120	103	101
Restaurants				
Eat at family restaurants 6+/month	112	76	114	110
Eat at family restaurants 2-5/month	100	82	99	104
Eat at family restaurants <2/month	97	135	105	111
Take out: pizza	103	83	112	113
Take out: Mexican	114	69	111	107
Take out: Chicken	94	133	92	117
Take out: Chinese	117	136	92	99
Enjoy foreign food	117	71	105	114
Electronics				
Purchased Separate Components	110	114	119	94
Purchased Compact/Console Stereo	116	147	103	103
Own 4+ televisions	69	136	112	138
Own 2+ VCRs	92	116	116	130
Own camcorder	84	64	124	149
Rent 31+ video cassettes	126	77	135	123
Purchase PC/Software/Peripherals	114	47	117	147
Gardening				
Indoor gardening/plants	98	78	101	117
Outdoor flower gardening	85	67	114	131
Outdoor vegetable gardening	63	60	129	124
Books				
Purchased paperback book	112	62	101	121
Purchased hardcover book	122	59	101	128
Purchased travel book	116	90	73	135
Purchased children's book	85	68	100	122
Purchased cook book	123	68	113	120
Baby Products				
Purchased infant toys	95	85	122	118
Purchased infant clothing	93	103	111	111
Purchased infant sleepwear	93	120	124	106
Pets				
Own dog	67	67	119	122
Own cat	87	55	109	119
Use dog/cat treats	88	54	123	131
PC Usage				
Own PC at home	111	49	117	145
Use PC at home 10+ hrs/wk	110	46	114	148
Use/subscribe to Internet	144	57	113	137
Hobbies/Interests				
Cooking	114	102	105	119
Bars/nightclubs	147	82	103	118
Dancing	138	104	115	103
Needlework	90	46	103	102
Listening to music	117	96	105	114
Photography	103	108	112	112
Household Furnishings				
Purchased household furniture	105	93	114	113
Purchased tableware/dinnerware	109	114	96	107
Purchased bedding/bath/linens	103	92	104	113
Home Improvements				
Made home improvements	73	74	115	124
Did home remodeling	56	86	117	134

Note: The Purchase Potential Index (PPI) is household-based and represents the propensity to purchase a product or service relative to the national average of 100. The above data represents how often various lifestyle group households throughout the nation purchase goods and services.

Source: ESRI BIS

propensity to buy certain types of goods varies among the primary lifestyle groups, in many instances there is high demand for merchandise among multiple lifestyle groups.

Exhibit RD-7 shows that the primary lifestyle groups within the market area – particularly *Baby Boomers with Children* and *Semirural Lifestyle* – are generally active consumers with above average demand in several service and merchandise categories. In particular, these Lifestyle groups most often demand apparel (especially children's/infant's clothing, shoes, jewelry, watches) and a variety of electronics (video/audio and PCs). Primary Lifestyle groups also enjoy dining out at family and foreign restaurants, take-out meals, cooking, dancing, going to bars/nightclubs, photography and listening to music.

The data presented in Exhibit RD-7 should not be used solely to identify businesses that will be "all things to all markets." Attracting niche businesses that serve specific target markets will be the key to a successful business recruitment and retention program in the study area.

Target Markets for Retail Development

To optimize chances for redeveloping the study area as a vibrant mixed-use district, the future business mix should cater to the needs and preferences of its primary target markets. Primary target markets for retail development in the study area are market area residents (including affluent households north of the study area), employees that work at nearby businesses, metro area residents and Southside hotel/motel guests. The following summarizes the characteristics and preferences of each.

- *Market Area Residents*

  The demographic characteristics of market area residents are presented in the Demographic Overview. In 2003, 184,006 people lived within a 15-minute drive of the study area, which is expected to increase to 205,014 residents by 2008. The age distribution of market area residents is slightly younger than the Atlanta MSA and state of Georgia, with a median age of 33.0 years compared to 34.2 and 34.6 years, respectively; however, the proportion of residents within the "prime consumer age category" (i.e., 25 to 64) is comparable to the MSA and state. While, market area households generally have incomes below MSA and state levels, residents moving into the market area will likely boost income levels. In terms of racial and ethic composition, the market area population is predominantly black or African-American (69%).

  The Demographic Overview also expands the analysis of resident demand with detailed Lifestyle profiles of market area residents. As *Enterprising Young Singles* account for almost one-quarter (22%) of market area households, close attention should be given to the characteristics of this group. *Enterprising Young Singles* are young, active and mobile. Although their incomes are only slightly above the national average, their long-term financial prospects are favorable due to the fact that they are well educated and have good jobs usually in professional, managerial, technical, sales and administrative positions. *Enterprising Young Singles* most likely rent (at a rate more than twice the national average) and live alone or have a roommate. Representative of their youth, leisure time is centered on fitness, dining out, going to bars, dancing, listening to music, travel and taking out fast food. As they are just setting up their homes, they demand household furnishings and appliances. *Enterprising Young Singles* also frequently buy apparel, electronics, books and PCs/software.

Two other primary Lifestyle groups within the market area (*Urban Working Families* and *Baby Boomers with Children*) are family oriented markets and together account for 29% of households. While both groups frequently have school age children at home, *Baby Boomers with Children* are more active consumers due to the fact that they tend to be higher, dual-income households. Nonetheless, both focus a bulk of their purchases on home and children.

Based on demographic characteristics of market area households, Lifestyle data, retail spending and purchasing activity and feedback from stakeholders and realtors, the types of goods that would be most appealing to area residents include: home furnishings and accessories, electronics (including PCs/accessories), apparel (especially shoes, children's/infant's clothing, sportswear), sports equipment, outdoor gear, children's toys and inexpensive jewelry. The types of convenience goods and services that would appeal to residents (particularly those living within and immediately surrounding the study area) include: take-home/prepared meals, video rental, day care, drycleaner/alterations, shoe repair and exercise studio/gym.

With ample chain and fast food restaurants scattered within and around the study area, one-of-a-kind restaurants (e.g., ethnic cuisine, deli, sidewalk cafes, pizza, family restaurants, dessert/coffee) that give area residents, employees and visitors a reason to travel to Union City should be targeted. The Green Manor is an existing one-of-a-kind restaurant that attracts multiple target markets to the study area.

One of the weaknesses of the market area is a limited selection of entertainment options. As a result, residents – particularly younger residents such as *Enterprising Young Singles* – often look elsewhere (e.g., downtown Atlanta, Midtown) for entertainment options. Attracting businesses that give this market something to do at night and on weekends such as bars, live music, dance clubs and a variety of restaurants should be a top priority in a business recruitment program. Attracting other types of entertainment that appeal to a wider range of residents – including families – and invoke a sense of community (e.g., a farmer's market, outdoor theater, concerts and community events) will help separate the study area from nearby shopping venues as well as serve a clear need in the area.

- *Employees*
  Employees who work within the immediate vicinity of the study area are a captive market in the sense that they are in the area for at least

eight hours a day, five days a week and, consequently, would be likely to shop, run errands and eat out in the study area if the appropriate businesses were present. In other words, more than 8,300 people are within a short drive or walk (i.e., within a two-mile radius) from the study area five days a week, most of whom represent a significant market for new retail development.

Also a valuable target market are commuters who rely on I-85 to get to and from work and may look to study area businesses to satisfy a portion of their daily needs (e.g., take-home food, drycleaner/tailor, daycare) if quality businesses were present. Pulling off the interstate and traveling a short distance along Shannon Parkway would not be an unreasonable detour for commuters.

General information on workday shopping behavior from surveys conducted by the International Council of Shopping Centers and other organizations follows:

– The major advantage of shopping close to the workplace is convenience.
– The items purchased most frequently by workers include cards, stationery, gifts, drugstore items, books and magazines, music/CDs and video rentals.
– With lesser frequency, workers buy office supplies, jewelry, apparel and accessories, linens, housewares, cosmetics and perfume, sporting goods and arts and crafts.
– The types of convenience goods perceived as being most needed by the daytime population are baked goods, take-home dinners and groceries.
– Workers will stop for after work activities (e.g., drinks, dinner and shopping) from time to time when such opportunities are available. Some will be inclined to come back to the business district to eat and shop on weekends.
– Most desired leisure/entertainment services are restaurants/bars and movie theaters. Banks and financial services, exercise studios, drycleaners/alterations, film processing, office supply, mail/packaging and copy centers are perceived as being desired types of personal or business services.

- *Metro Resident and Hotel/Motel Visitors*
  Attracting customers from outside of the market area will play a role in the success of new retail development within the study area. As Union City continues to grow and progress with its physical improvements and business expansion programs, the study area will be well positioned to attract visitors from surrounding counties and, perhaps, visitors staying in Southside hotels and motels. Union City's location along I-85 makes it accessible to this "outside" market assuming that they are given a reason to make a special trip. Physical improvements and design elements hat contribute to Union City's historic, small town image (e.g., façade improvements, streetscaping, pedestrian linkages, etc.) will help draw residents of the metro area who are looking for a unique experience. Visitors will also be willing to

travel to Union City to shop and eat out at one-of-a-kind businesses.

ESRI Business Information Solutions' Retail MarketPlace Report shows that market area businesses are currently attracting customers that reside outside of the market area. The MarketPlace report weighs estimated retail demand against estimated retail sales to show a leakage/surplus factor for the market area. Estimated demand is based on household expenditure data generated by the Bureau of Labor Statistics' Consumer Expenditure Survey while estimated sales

Exhibit RD-8

Retail MarketPlace Profile
Retail Market Area
2003

Merchandise or Service Category	Surplus/Leakage Factor
Automotive Dealers	-24.6
Other Motor Vehicle Dealers	-12.9
Auto Parts, Accessories & Tires	-14.0
Furniture	37.5
Home Furnishings	35.8
Electronics & Appliances	55.9
Building Materials & Supply Dealers	-10.0
Lawn & Garden Equipment & Supplies	35.8
Grocery	-3.1
Specialty Food	-37.2
Beer, Wine & Liquor	-38.8
Health & Personal Care	-24.9
Clothing	-3.2
Shoes	-33.1
Jewelry, Luggage & Leather Goods	-31.4
Sporting Goods/Hobby/Musical Instruments	-13.6
Books, Periodical & Music	-16.0
Department Stores	-2.8
Other General Merchandise	-33.6
Florists	-26.2
Office Supplies, Stationary & Gifts	4.9
Used Merchandise	2.7
Other Misc. Stores	12.5
Full Service Restaurants	19.4
Limited-Service Eating Places	-10.8
Drinking Places	40.3
Total Retail Trade and Food & Drink	-11.5
Total Retail Trade	-11.8
Total Food & Drink	-9.7

Source: ESRI BIS

data is derived from the Census of Retail Trade updated by ESRI BIS. A leakage indicates that retail demand exceeds supply within the market area, causing consumers to look outside of the market area for retail goods and services. Conversely, a surplus indicates that supply exceeds demand and consumers are therefore being drawn from outside of the market area. The leakage surplus factor ranges from 100 (total leakage) to -100 (total surplus). Exhibit RD-8 shows a surplus of retail sales within the market area, with a leakage/surplus factor of –11.5. While a surplus may seem problematic, in reality the surplus shows that market area retail businesses are already drawing customers from outside of the market area, which will is almost certain to increase as the study area is redeveloped.

Retail goods and services that show a strong leakage and should be included in a business recruitment program are furniture stores and home furnishings, full-service restaurants and electronics and appliance stores.

Retail Development Guidelines

The single most important competitive advantage of retail development throughout the study area will be its ability to provide residents, area employees and visitors with a variety of shopping and entertainment options that are not only convenient but unlike what they can find elsewhere in the area. A large share of Union City's major commercial development is concentrated along Shannon Parkway, much of which is comprised of national retail chains in a ubiquitous commercial strip setting. The end result is that existing retail development in and around the study area offers nearby residents convenience, ample choices and an experience almost identical to hundreds of commercial areas throughout the nation: "Anywhere USA."

As new entertainment, shopping, housing and office uses are developed in the study area, it is imperative to the future success of this development that it adhere to several guiding principles to reinforce and enhance its distinct identity. These principles are reflected in the following guidelines:

- **Work to promote business clustering**. A critical component of retail development is the creation of a unified district with complementary businesses that benefit from each other's sales, customers and markets. The primary vehicle for developing unified groups of stores and businesses is clustering – creating mutual advantages in terms of pedestrian flow and shared markets between businesses. Successful clustering is dependent upon having the appropriate mix of businesses that will create market synergies and an uninterrupted grouping of businesses that draw customers to and through the entire district. A direct result of successful clustering is that it creates a critical mass of businesses that encourages customer traffic. When compatible or complementary businesses are clustered together, the likelihood increases that customers will go to more than one business and spend more money by making multiple purchases. "One purchase leads to another" is a time-tested, fundamental principle of consumer behavior. Educating business owners, property owners and real estate professionals about the importance of using this business development tool is critical.

- **Look beyond strip development.** Strip development is one-dimensional, encouraging customers to complete their tasks and leave as quickly as possible without any interaction with the community itself. Shopping centers that lack a sense of place, that fail to connect with other aspects of daily life and that do not heighten the joy/experience of shopping are ones that will loose in the long run. The study area should not only attract a mix of uses (residential, office, institutional, services, restaurant, entertainment and retail) but should be developed in such a way that residents, customers and workers feel connected to each other and their environment.

- **Minimize the use of the automobile.** A safe, pleasant and convenient atmosphere for pedestrians and bicyclists will encourage movement throughout the entire district. Although customers will more often than not use their cars to reach the study area, using design and land use planning to encourage pedestrian activity within the study area as well as enticing residents and workers to walk to shopping and entertainment will enliven the overall area, reduce traffic and invoke a sense of community.

- **Focus on attracting unique businesses and activities.** Offering unique goods and services is the best way to draw multiple target markets – area employees, residents and visitors – to the study area. One-of-a-kind mom-and-pop restaurants (e.g., sidewalk cafes, dessert shops, home cooking, ethnic cuisine, etc.) or shops that focus on customer service and, perhaps, have ties to the community will be the easiest to attract to the study area and will contribute to the its sense of place (i.e., "place making" businesses). While national retailers can act as anchors, smaller, unique stores should be the focus of business recruitment efforts.

- **Use land resources efficiently.** Work to reuse existing sites (e.g., underutilized strip centers) and encourage infill development. Ultimately, the study area should be densely developed area with a mix of residential, commercial, cultural and office uses.

RESIDENTIAL MARKET ANALYSIS

The residential market analysis is focused on the for-sale and rental residential markets in the Union City area. The residential market area is defined as a 15-minute drive from the study area and is considered to be the area from which a majority of potential study area residents will be drawn. Using demographic data presented in the Demographic Overview (e.g., population growth, household income data) and 2000 Census data, estimates of potential demand for the for-sale and rental sectors for the 2003-2013 period are provided. Estimated potential demand for for-sale and rental housing is calibrated with Lifestyle data to help determine the proportion of households in the market area that are realistic target markets for residential development in the study area.

Potential Demand for For-Sale and Rental Housing

A statistical demand analysis was performed for the residential market area to estimate the potential market depth for for-sale and rental housing (Exhibits HD-1 to HD-3). Even though the analysis uses finite numbers, the end result (i.e., potential market support) should be interpreted as an approximation of market depth that is balanced with the characteristics of the competitive supply.

The two main sources of annual potential demand for housing are new household growth and turnover. New household growth[2] is traditionally used to project market growth and is based on population and household growth projections. The analyses use the average annual increase in population beginning with the 2003 estimated household base and the projected 2003-2013 annual increase in new households.

In both the owner and renter demand analyses, the more quantitatively significant source of potential demand, turnover, has as a base the estimated number of owner or renter occupied units that will exist within the market area during the next ten years. Projected owner or renter occupied households are qualified or segmented by owner or renter turnover rates (derived from the 2000 Census).

Households that will potentially be owners or renters are qualified by income, household size and Lifestyle data. Recognizing that potential demand for study area housing will depend on housing preferences of new and existing market area households, Lifestyle data are used to narrow the estimated potential demand to include households that would be most attracted to new housing developed in the study area (e.g., single-person households, empty nesters, professional couples with few or no children, etc.). In other words, the appeal of residential development in the study area will vary depending on a household's characteristics or preferences. For instance, a large family may demand a house with a big yard in a suburban setting over a loft-style home in a mixed-use setting.

[2] New households are those currently living outside of the market area, the majority of which likely reside within the Atlanta Regional Commission's 10-county area.

It is assumed that a majority of prospective homebuyers have annual incomes of $35,000 and higher and live in one to three person households. Based on the estimate that 56% of market area households will own rather than rent and that 65% of new households moving into the market area will own their homes, Exhibit HD-1 estimates that over the next ten years 989 households will be potential buyers of higher density, new market rate housing built in the market area each year.

Exhibit HD-2 presents the potential demand for market rate rental product within the market area. Similar to Exhibit HD-1, households are qualified by Lifestyle group, income and household size. One to three person households with annual incomes between $25,000 and $50,000 are represented in Exhibit HD-2. An estimated 1,305 annual households in the

Exhibit HD-1

POTENTIAL ANNUAL DEMAND ANALYSIS FOR FOR-SALE UNITS
Residential Market Area
2003-2013

New Household Demand		Turnover	
Annual New Households (1)	2,262	Total Households (1)	68,750
Owner Propensity	65%	Owner Propensity	56%
Number	1,470	Number	38,500
Target Market Adjustment (2)	40%	Turnover Rate (5)	9%
Number	588	Number	3,465
Income Qualified (3)	74%	Target Market Adjustment (6)	35%
Number	435	Number	1,213
Household Size Qualified (4)	71%	Income Qualified (7)	64%
Sub-Total	309	Number	776
		Household Size Qualified (8)	71%
		Sub-Total	551
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			989

1. ESRI BIS
2. Based on Lifestyle data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of $35,000 and greater.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of owner households that turnover within a 15 month period.
6. Based on Lifestyle data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of $35,000 and greater.
8. Estimated proportion of new households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

Exhibit HD-2

POTENTIAL ANNUAL DEMAND ANALYSIS FOR RENTAL APARTMENT UNITS
Residential Market Area
2003-2013

New Household Demand		Turnover	
Annual New Households (1)	2,262	Total Households (1)	68,750
Renter Propensity	35%	Renter Propensity	44%
Number	792	Number	30,250
Target Market Adjustment(2)	40%	Turnover Rate (5)	43%
Number	317	Number	13,008
Income Qualified (3)	25%	Target Market Adjustment(6)	35%
Number	79	Number	4,553
Household Size Qualified (4)	78%	Income Qualified (7)	31%
Subtotal	62	Number	1,411
		Household Size Qualified (8)	76%
		Sub-Total	1,073
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			1,305

1. ESRI BIS
2. Based on Lifestyle data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of $25,000-$50,000.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of renter households that turnover within a 15 month period.
6. Based on Lifestyle data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of $25,000-$50,000.
8. Estimated proportion of new households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

EXHIBIT HD-3

PRELIMINARY FOR-SALE HOUSING PROGRAM
Residential Market Area and Study Area Capture
Ten-Year Program

	Potential Demand for New For-Sale Housing Units (1)	Study Area Capture Rate	Total Study Area Capture
Year 1	989	4%	40
Year 2	989	4%	40
Year 3	989	4%	40
Year 4	989	5%	49
Year 5	989	5%	49
Year 6	989	5%	49
Year 7	989	5%	49
Year 8	989	6%	59
Year 9	989	6%	59
Year 10	989	6%	59
Total	9,891	5%	495

1. As shown in Exhibit HD-1

PRELIMINARY RENTER HOUSING PROGRAM
Residential Market Area and Study Area Capture
Ten-Year Program

	Potential Demand for New Rental Housing Units (2)	Study Area Capture Rate	Total Study Area Capture
Year 1	1,305	5%	65
Year 2	1,305	5%	65
Year 3	1,305	5%	65
Year 4	1,305	5%	65
Year 5	1,305	6%	78
Year 6	1,305	6%	78
Year 7	1,305	6%	78
Year 8	1,305	7%	91
Year 9	1,305	7%	91
Year 10	1,305	7%	91
Total	13,045	6%	770

2. As shown in Exhibit HD-2

PRELIMINARY HOUSING PROGRAM
Study Area Capture of For-Sale and Rental Product
Ten-Year Program

	Potential Demand for New Rental and For-Sale Housing Units	Percentage of For-Sale Units	Percentage of Rental Units
Year 1	105	38%	62%
Year 2	105	38%	62%
Year 3	105	38%	62%
Year 4	115	43%	57%
Year 5	128	39%	61%
Year 6	128	39%	61%
Year 7	128	39%	61%
Year 8	151	39%	61%
Year 9	151	39%	61%
Year 10	151	39%	61%
Total	1,264	39%	61%

Sources: Marketek, Inc.; Census 2000; ESRI BIS

market area are potential renters at market rate projects set in a mixed-use setting. The potential demand analysis completed for this study does not include prospective households from outside the market area that would be drawn to the study area as redevelopment progresses.

Based on an evaluation of the housing market in the Union City area, planned and proposed physical improvements in the study area, the expansion of the study area's position as a mixed-use center and our experience in facilitating residential development in comparable areas, Marketek estimates that during the first ten years of development, approximately 1,264 units of market rate for-sale and rental housing units could be absorbed in the study area (Exhibit HD-3 on the previous page). Again, this estimate is narrowed by Lifestyle data to include only households that would be most interested in living in a higher density, mixed-use environment.

Within the estimated demand for 1,264 residential units in the study area, 39% (or 495 units) is for-sale product and 61% (or 770 units) is rental product. Marketek estimates that the study area has the potential to capture 5% of market area demand for higher density, for-sale product between 2003 and 2013 and 6% of demand for rental product.

The projection for the potential demand for housing in the study area assumes that there will exist marketable for-sale and rental housing product and that a marketing program for new housing will be underway. The housing types would include renovation, adaptive re-use of existing structures and new construction.

While the conclusion that there is unmet potential demand for housing in the study area is difficult to quantify directly, the following evidence exists to support this conclusion:

- Strong growth in Union City, especially along High Point Road.

- Strong absorption rates at newly developed for-sale developments in the Union City area.

- A limited amount of newly developed rental product with attractive amenity packages in the area.

- Access to major employment centers via I-85.

- Limited supply of for-sale and rental housing developed within a mixed-use setting in the market area. Consumers are increasingly demanding culture, community and convenience, something that is typically hard to find in suburban environments.

In terms of expected prices of new housing located in the study area, opening price points of for-sale units should range from $120,000 to $180,000. More affordable units will appeal to young professionals who either work in the area or commute to jobs throughout the MSA in exchange for being part of a vibrant, mixed-use community. Niche projects that have a small number of units and unique architectural style have been popular in other cities. Strong pre-sales activity was evident among projects surveyed. While some of these projects have sales prices that exceed $180,000, it is our opinion that when unit prices rise above this level, demand will begin to thin out. However, there is clearly demand for units priced at $180,000 and up – just a smaller proportion.

Based on current monthly rents at the market rate rental communities in the competitive market area, market rents in the general range of $700 to $850 for a two-bedroom unit would be achievable in the study area. These rents justifiably exceed average rents at the projects surveyed as the type of rental product envisioned for the study area will be new, unique to the area, accessible and have amenities not offered at many of the nearby apartment communities.

Community and unit amenities at competitive rental projects as well as a recent national survey of renters conducted by the National Association of Home Builders indicate that convenient, secure parking should be provided with at least one space per unit at no charge. Community features should include a laundry room, an exercise facility, a pool and security measures. Washer/dryer hookup or washer/dryer, balcony, extra storage, dishwasher/disposal, cable-ready and high-speed Internet access should be standard unit features.

Live/work units, both for-sale and rental, should be considered to accommodate growing numbers of people who are seeking larger than average space that is adaptable to living and working. These units should average from 1,200 to 1,500 square feet and be priced according to finish.

As housing development proceeds in the study area and a critical mass of units is created, the absorption of housing units will gain momentum and boost prices. New housing development will act as an anchor that will attract businesses, services and activities, which in turn will enliven the overall district.

Target Markets for Residential Development

Early residents of newly developed housing in the study area are likely to be relatively mobile, well educated, active and somewhat adventuresome. They will have few or no children. Based on experience in other communities, employees working in or close to the study area should be an initial target market for new housing. These prospective residents will primarily include young people (e.g., *Enterprising Young Singles*), singles and couples with few or no children and empty nesters who are couples or single persons with grown children. Empty nesters and childless individuals who are in their prime career and pre-elderly years will be significantly more flexible in terms of housing and migration patterns than were previous generations at this age. Experience suggests that these early prospects will have professional, managerial, administrative and clerical occupations. Exhibit HD-4 on the following page provides a generalized summary of primary target markets for residential development in the study area.

As housing development in the study area gains momentum, the demand for new housing will be augmented by groups outside of the market area such as married couples with and without children, empty nesters, retirees and professionals that work within commuting distance of their jobs. Increasingly, homeowners are tired of auto-centric, cookie-cutter developments that prevail in the suburbs.

EXHIBIT HD-4

TARGET MARKET CHARACTERISTICS FOR NEWLY DEVELOPED HOUSING

	For-Sale Product	Rental Product	Live/Work Units For-Sale and Rental
Occupation **Age** **Household Size** **Income** **Motivations/Preferences**	**Entry-Level Professionals** 25 to 35 1 to 2 persons, few with children $35,000-$50,000 Access to work/downtown activities Location with identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Relatively mobile	**Service, technical, administrative** 25 to 50 1 to 2 persons, some with children $25,000-$40,000 Close to work/downtown activities Value convenience/security Highly mobile	**Artists/Professionals** 25 to 50 1 to 2 persons, few children $35,000+ Seek urban lifestyle Seek large adaptable spaces Access to suppliers, customers Relatively mobile
Occupation **Age** **Household Size** **Income** **Motivations/Preferences**	**Higher Level Professionals** 30 to 50 1 to 2 persons, some with children $50,000+ Access to work/downtown activities Move-up or move-over buyer Seek vibrant, mixed-use setting Location with identity/sense of place Investment and resale important Relatively mobile	**Entry-Level Professionals** 25 to 35 1 to 2 persons, few with children $30,000-$40,000 Close to work/downtown activities Seek vibrant, mixed-use setting Location with identity/sense of place Relatively mobile	**Creative** Advertising, marketing, arts, film & music, software developers, inventors, photographers, designers **Professionals** More traditional fields of accounting/finance, education, law, various types of consulting
Occupation **Age** **Household Size** **Income** **Motivations/Preferences**	**Business Owners/Operators** 30 to 60 1 to 2 persons, few with children $40,000+ Access to work/downtown activities Individualized unit Relatively settled	**Higher Level Professionals** 30 to 50 1 to 2 persons, few with children $40,000+ Close to work/downtown activities Location with identity/sense of place Highly mobile Seek vibrant, mixed-use setting	
Occupation **Age** **Household Size** **Income** **Motivations/Preferences**	**Retirees** 55+ 1 to 2 persons $35,000 or available equity Close to businesses/services Enjoy community/activities Less maintenance, more security Move-over, move-down buyer Highly settled	**Retirees** 55+ 1 to 2 persons $30,000+ Close to businesses/services Enjoy downtown community/activities Less maintenance, more security Location with identity/sense of place Relatively settled	

Source: Marketek, Inc.

Residential Development Guidelines

While the immediate potential for study area housing appears bright, there are several key factors that need to be considered for the long-term success of new housing. Successful housing programs throughout the nation seem to have the following common elements:

- **Commitment to Residential Development.** Local government needs to make a strong commitment to housing development in the study area with appropriate land use regulatory policies, assistance with land acquisition, creative financing to bridge economic gaps, tax incentives and adequate infrastructure. A continuing commitment from the local government to support new housing is critical to nurture developer and resident confidence, as well as to enhance financial feasibility.

- **Environment.** Significant challenges to ensuring a high quality of life are not only economic but also environmental. Environmental issues relate to public image, safety, parking, traffic flow, design and architecture, street life and creating a sense of community.

- **Security.** New housing located in the study area should include security features such as alarm systems, controlled access to parking and interior areas, exterior lighting, intercoms, illumination of all areas where residents circulate and design features that discourage crime. Housing units that are elevated above retail and parking foster a sense of security. While security features are a prime marketing asset, it is vitally important that they are not so overwhelming that they create a feeling of fortification between the development and the surrounding community.

- **Parking.** Secured, convenient parking is a requirement for housing. Experience in other communities has shown that many prospective residents see a possible lack of parking as a disadvantage of mixed-use living. While parking is a necessity for housing development, it is important that it is well designed and integrated into the community (e.g., underground parking or landscaped surface parking hidden from the street).

- **Public Relations.** Working with the local media to highlight success stories and monitoring construction throughout the study area will help convince target markets that new housing in the study area is an attractive and unique lifestyle choice. Other effective forms of communication include newsletters and websites that keep potential residents up-to-date on special events and redevelopment activity.

- **Quality Product.** New housing must offer high quality product in terms of design and amenities. The challenge is balancing what consumers can pay with what they want. The most frequently desired unit amenities will likely include: washer/dryer, security system, on-site parking, patio or balcony, storage space, interesting views/ architecture and windows/natural light.

- **Design Qualities.** The design of new construction should relate to the surrounding community. The new residential development should be distinctive and not "Anywhere USA." Suburban-style floor plans need to be avoided since this is not what most town center residents are seeking. As mentioned earlier in this report, niche projects that have a small number of units and unique architectural style have proven popular in other cities, particularly in the for-sale market.

- **Support Services.** Many activities of daily life should occur within walking distance of residential development allowing independence for those who choose not to drive. Although study area residents will more than likely use their cars to commute to work, the promise of being able to walk to shop, eat out or do errands is a significant selling point for new housing. Besides proximity to restaurants and shopping, study area residents will desire access to groceries and convenience goods, pharmaceutical services, a post office and a range of services such as dry cleaner/laundry, apparel and footwear repair, video rental, film processing, hairstyling, etc.

Union City Town Center LCI Study

Task Force

MEETING SCHEDULE

09/23/03	5:00 pm – 6:00 pm
10/07/03	5:00 pm – 6:00 pm
10/28/03	5:00 pm – 6:00 pm
11/18/03	5:00 pm – 6:00 pm

Union City Town Center LCI Study

Public Involvement

MEETING SCHEDULE

09/23/03	6:30 pm – 9:00 pm	Kickoff/Visioning Workshop
10/07/03	6:30 pm – 9:00 pm	Plan Workshop
11/18/03	6:30 pm – 8:00 pm	Plan Presentation

Union City Town Center LCI Study

Task Force Meeting #1
5:00 – 6:00 PM, Tuesday, September 23, 2003

A G E N D A

I. Introductions

II. Review Study Process and Schedule

III. Review of Activities-to-Date

IV. Key Questions:
   a. What trends have you seen in the past five years?
   b. What do you think the future holds?

V. Adjourn

Union City Town Center LCI Study

Task Force Meeting #2
5:00 – 6:00 PM, Tuesday, October 7, 2003

A G E N D A

I. Introductions

II. Distribute Draft Inventory and Analysis Document

III. Review Shannon Mall Concepts

IV. Adjourn

Union City Town Center LCI Study

Public Workshop #1
6:30 – 9:00 PM, Tuesday, September 23, 2003

Agenda

6:30 – 645 pm	Introductions
6:45 – 7:00 pm	Review of LCI Program, Process and Schedule
7:00 – 7:20 pm	Planning for the Public Realm
7:20 – 7:30 pm	Streets and Networks
7:30 – 7:45 pm	Image Preference Survey
7:45 – 8:10 pm	Interactive Review of Existing Conditions
	What do you like?
	What do you dislike?
8:10 – 8:25 pm	Review of Image Preference Survey Results
8:25 – 9:00 pm	Visioning the Union City Town Center
	What things about the Union City Town Center Area should never change?
	What words come to mind when you think about what the Union City Town Center should become?
	What are some places that you have been visited that could you would like the Town Center Area to be more like? What do you like about these places?
9:00 pm	Adjourn

Union City Town Center LCI Study

Task Force Meeting #3
5:00 – 6:00 PM, Tuesday, October 28, 2003

A G E N D A

I. Review of Draft Land Use Concept Plan

II. Review of yield

III. Next steps

IV. Adjourn

Union City Town Center LCI Study

Public Workshop #2
6:30 – 9:00 PM, Tuesday, October 7, 2003

Agenda

6:30 – 640 pm	Introductions
6:40 – 6:55 pm	Review of Workshop #1 Findings
6:55 – 7:30 pm	Visioning Overlays
	Business Land Uses
	Residential Land uses
	Street-front Retail
8:00 – 8:10 pm	Break
8:10 – 9:00 pm	Visioning Overlays
	Parks and Open Space
	Civic Buildings
	Streets
	Mobility
9:00 pm	Adjourn

Union City Workshop #2: Overlay Summaries

Overlay #1 – Business Land Uses

- Offices
  - 1 put offices on north side of Mall Blvd, west of the existing corporate HQ
  - 1 put medical offices/urgent care west of Shannon Pkwy, south of Flat Shoals
  - 1 put mixed office/commercial at SE corner of Flat Shoals and Shannon Pkwy
  - 1 converted Park & Ride lot to an office/hotel park
  - 1 added office use at NE corner of Shannon Pkwy and Shannon Blvd.
- Commercial
  - All assumed or said to "redevelop" the Shannon Pkwy portion between Mall Blvd and Jonesboro for commercial uses
  - 1 emphasized commercial along Mall Entry road at south side of Mall
- Misc.
  - "Fix up" the cinema on south side of Jonesboro (not in study area)

Analysis of Results

- High consistency of commercial placement – no new ideas here, more of "let's make what is supposed to be there better"
- The Mall was somewhat assumed to be left as is
- Much more assortment of responses on the office use side – not particularly consistent
- This was the first overlay so it took people some time to orient themselves. This probably detracted from a more comprehensive response.
- It was difficult for people to isolate a particular use without thinking of other uses at the same time.

Overlay #2 – Housing/Residential

- Single Family
  - All 3 continued this use in NW corner of study area (Watson and Flat Shoals)
  - 2 expanded the SF to extend eastward to Shannon Pkwy
  - The 2 existing subdivisions in SW corner assumed to stay
  - 2 added new SF between Shannon Blvd and Mall Blvd (surrounding the proposed greenway/stream)
  - 1 added new SF infill in NE corner just west of Oakley
- Townhomes
  - 1 added some TH as infill within the SF in NW corner of study area
  - 2 placed TH on north side of Mall Blvd (1 of these extended all the way north ot proposed park, the other transitioned to SF
  - 1 placed TH at the corner of Mall Blvd and Shannon Pkwy
  - 2 placed TH south of Mall Blvd in the Mall area
  - 1 placed TH on south side of Shannon Blvd in between this road and proposed stream park
  - Some TH infill added to existing NE corner (this section was not well addressed – assumed to maintain status quo)
- Apartments/Multi-family
  - All 3 placed MF in the Mall site but in different locations (north, west and south). North side called them “senior housing”
  - More infill apartment in NE corner of study area
  - 1 added a large block of MF just west of Shannon Pkwy and north of greenway
- Mixed Housing
  - 1 converted current industrial use area to mixed housing
  - Same table showed housing above storefronts along Shannon Pkwy south of Mall Blvd

Analysis of Results

- High consistency in a transitional approach to housing extending from multi-family in mall area to TH (primarily north and east of this) to single family in the northwest section
- Some attempts to provide some areas of mixed housing
- TH were assumed to mean ownership, not rental

Overlay #3 – Storefront Retail

- 1 showed this along a "V" shaped roadway from Mall entry road, cut through the existing mall to center, then diagonally up to Shannon Pkwy/Mall Blvd intersection
- 1 chose to make storefront retail along both Londonderry and Shannon Pkwy (south of Mall Blvd), as well as a new intersecting street (parallel to Jonesboro on north side)
- 1 put along intersection of Flat Shoals and Shannon Pkwy
- 1 put within an area of current single family neighborhood in NW corner of study area
- 1 had an unclear item – 2 circular areas were placed north of Mall Blvd and south of Shannon Blvd – are these meant to be storefront areas?

Analysis of Results

- Very low consistency – tables placed this in different locations
- Did not always tie to where they placed commercial on Overlay #1 – these should be done together

Overlay #4 – Parks and Open Space

- All 3 put greenway running east-west along stream/flood plain corridor
- All 3 placed a greenspace/park along this greenway between Oakley and Shannon Parkway – 2 also placed a "Town Square/plaza" there
- All 3 placed a town square adjacent to the existing Mall – 2 tables placed it on the western side between the Mall and Londonderry, while the other put it on the south side facing I-85 (this table placed 2 plazas there)
- 2 placed a plaza or park around the intersection of Shannon Pkwy and Flat Shoals Rd.
- 2 placed a park along the southwestern portion of the study area (1 table put it more along the stream while the other filling the current industrial area)
- 2 placed a square or greenspace on the open lot on ___ street (perpendicular to Park St.) – they tied this back into the Mayors Park and proposed stream greenway
- 1 placed a greenway from a town square at the Mall and running north
- 2 made additional greenway/trails running from Mall Blvd park up to Flat Shoals and around the west side back down to the western proposed greenway. This passes through three current residential areas.
- 1 table emphasized that all major roads should be tree lined streets
- 1 placed a "family fun recreational center" south of Jonesboro Rd (not in study area) – possibly using the WalMart building when it moves

Analysis of Results

- Very strong and enthusiastic endorsement and interest in this category
- High consistency that stream/flood plain area is prime candidate for a park and greenway system. The greenway was shown across the entire stream corridor – some also advocated a large park area in the portion between Shannon Pkwy and Oakley.
- Attempts made to tie this greenway system into other parts (e.g. Mayors Park, residential areas, etc.) – full loops and connections not always made but more probably due to lack of time to consider that aspect
- "Town square" concept consistently placed at Mall area – 2 tables also showed a more minor version at the corner of Flat Shoals and Shannon Pkwy
- Some acknowledgement that the City Hall street (east of Watson) could be an area for another square

Overlay #5 – Civic Uses

- Schools
  - 1 put a high school/middle school in the park and ride lot
  - 1 put a high school/middle school in the current industrial area
  - 2 put elementary schools on the west side of Shannon Pkwy (NW quadrant of study area)
  - 1 put a school west of Oakley/south of Flat Shoals
  - 1 put a college (GMC) as the center of the existing mall
- Post office/Library
  - All 3 put some type of civic function (1 expanded post office, 1 library, ` TBD) on east side of Watson St. north of the Mayor's Park
  - 2 put a library along Mall Blvd
  - 1 put a library between the Mall and Londonderry
- Recreational/Senior Centers
  - 1 put a YMCA between the Mall and Londonderry
  - 1 placed a rec center in the park created along the stream north of Mall Blvd
  - 1 placed a rec center at the SE intersection of Flat Shoals and Shannon Pkwy
  - 1 placed a senior center along Mall Blvd.
- Fire/Police
  - All 3 placed a fire station on Shannon Pkwy just north of the stream
- Misc.
  - 1 placed 3 civic use buildings around their proposed GMC in current mall area
  - 1 table noted that children's bus stops should have shelters

Analysis of Results

- Wide variety of responses to this topic – several creative ideas occurred here: HS/MS in the park and ride lot or current industrial area; GMC as the "mall hive" of a civic uses; a senior center placed next to proposed senior housing on north side of mall
- All thought an elem. School should go in the northern part of the study area, usually placed just west of Shannon Pkwy
- All thought a library or post office is needed over by the residential area by Watson St. and that a fire station is needed somewhat in the center of the study area

Overlay #6 – Streets

- All want Shannon Pkwy to be a main road, up to standards to accommodate all kinds of traffic
- 1 suggested parallel minor roads (like access roads) on the north and south sides of Jonesboro Rd to relieve traffic there
- 2 created a minor road along the proposed greenway between Oakley and Shannon Pkwy. Both extended it westward and tied into the street that houses City Hall
- all also extended Mall Blvd westward and either tied into that same City Hall St. or to a new north/south route to the west of Shannon Pkwy
- all created a new north/south road perpendicular to Shannon Blvd between Oakley and Shannon Pkwy
- 2 then tied this road into the current subdivision dead end to the east – 1 took this and extended westward to Shannon Pkwy
- all extended Shannon Blvd. West to the existing ____ St.
- 1 wants 2-way thru access across Jonesboro Rd into the Mall entry road
- 1 created a parallel road to Church St. off Flat Shoals (between Church and Shannon Pkwy) and ran north/south all the way down to Jonesboro Rd.
- problem intersections: Mall Entry Road, curve in Shannon Pkwy dangerous, traffic gets backed up on I-85 at Jonesboro Rd exit

Analysis of Results

- some strong consistency here, especially tying Shannon Blvd. and Mall Blvd to streets at the western side of the study area
- also strong belief that Shannon Pkwy needs to be enhanced and will play a strong role in this redevelopment effort
- good beginnings of connectivity/grid pattern connectivity created with new minor street additions proposed
- parallel roads to Jonesboro is an interesting proposal – Jonesboro considered a bad congestion problem
- problem with I-85 –Jonesboro exit not addressed

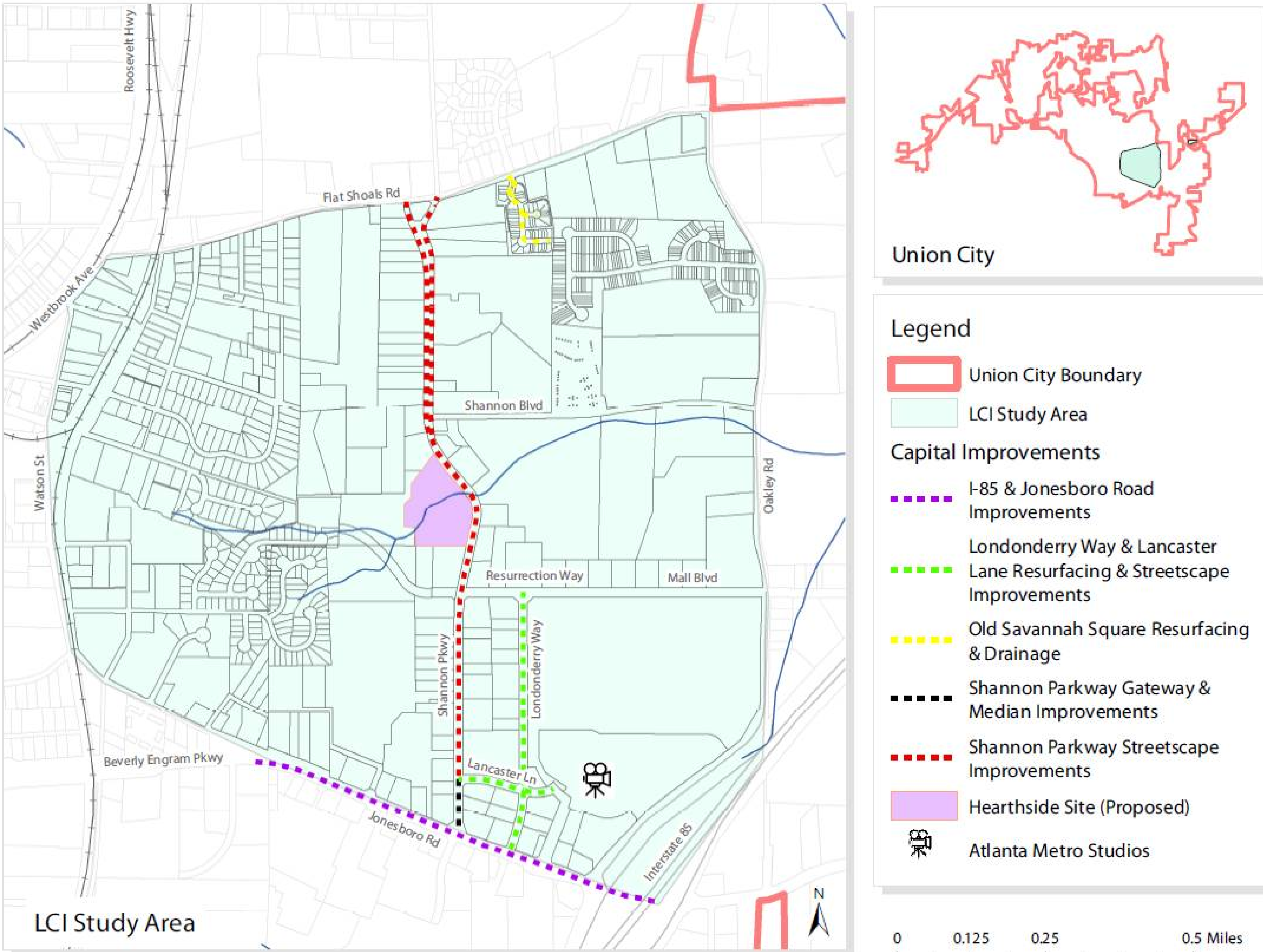
Overlay #7 – Mobility

- Bus
    - All said to make a bus route down Shannon Pkwy to connect Flat Shoals and Jonesboro Rd. – it was brought up that the buses don't currently traverse the study area, instead, just exit off I-85 at Jonesboro.
    - 1 placed a route down a proposed north/south road inbetween Shannon Pkwy and Oakley, and along Mall Blvd and new cross streets
    - 1 placed a full circular route from Flat Shoals – Watson – Jonesboro – Oakley
    - 1 put along an east/west route along the proposed extension westward of Mall Blvd to connect to City Hall st. to the west
    - 1 placed a bus route along their "V" shaped storefront district in the mall area
- Bike
    - 2 put along Shannon Pkwy
    - all put along the proposed greenway along the stream corridor
    - 1 put along Jonesboro
    - 2 connected a bike trail along the stream with others into the residential areas to the north
    - 2 put in the Shannon Mall area
- Sidewalks
    - Basically, put them along all major and minor roads!
    - 2 put sidewalks in current mall area

Analysis of Results

- Because UC has so few sidewalks, the general comment is to put them in
- Bike trails were aligned with greenways – also recognized these should be used to connect residential areas to the greenway
- Bike trails also put within Mall area (a perimeter walking/biking trail may be feasible here, especially if housing added – seniors often use the mall interior for "walking courses")
- Believed that buses would be used if they were to go where the apartments and TH are and bring into mall area
- The park and ride lot was not considered useful as a commuter lot to the train station – most felt it should be put to a different use.

Study Area Map Update



Data Source: Fulton County GIS

Implementation Plan Update

Listed in the below table are recently completed projects advancing the vision and goals of the Town Center LCI study

Project	Status	Projected Completion Date	Cost	Funding Source
Completed Projects (since 2016)				
Establish and enhance existing visual gateways	Completed	2016	$85,000	General Fund
Coordinate with MARTA to improve and expand local and regional public transportation service	Completed	2017	Staff Time	N/A
Old Savannah Square, Resurfacing & Drainage Improvements	Completed	2020	$522,000	CDBG
Redevelopment of Shannon Mall into Atlanta Metro Studios	Completed	2020	Approx. $10 million	Private
Continue Clean and Lien Program	Completed/ Ongoing	2021	Staff Time	N/A