Draft Economic Development Strategic Plan

Prepared for the City of South Fulton

January 2020

bae urban economics

January 21, 2020

Christopher Pike
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Dear Mr. Pike:

BAE Urban Economics is pleased to submit this draft Economic Development Strategic Plan for the city of South Fulton. This report includes an assessment of demographic and economic conditions, a discussion of special opportunity areas, a review of results of extensive community input obtained through surveys, focus groups, SWOT analysis sessions, and stakeholder interviews, and finally, an action plan for the near and long term, five years and beyond.

The recommendations in this plan are specific and include organizational roles, timeline, and guidance on implementation strategies. These recommendations are not platitudes that are unrealistic but rather steps that can be taken making full use of tools and resources that are currently available from public and private sources, supplemented by new initiatives that help set up synergistic economic growth.

Please contact me with questions or comments on this part of the plan. Thank you again for the opportunity to participate in this important work on behalf of South Fulton.

Sincerely,

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INTRODUCTION

The City of South Fulton was incorporated from previously unincorporated land in Fulton County, Georgia in 2017. The newly established City issued an RFP for an Economic Development Strategic Plan in October 2018. In March 2019 the City commissioned BAE Urban Economics to prepare the South Fulton Economic Development Strategic Plan that would provide a framework to increase the City's tax base, enhance the local business climate, promote entrepreneurship, and help create high-paying, high-quality jobs. The study scope, as prepared by BAE, includes the following elements:

- A demographic and economic conditions assessment
- A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis informed by community input
- An industry sector analysis informed by business and resident surveys
- Strategies, goals and recommendations in an Economic Development Strategic Plan

EXECUTIVE SUMMARY

This comprehensive study provides a strategic, actionable plan for the economic development of the city of South Fulton. Our approach to developing recommendations involves using both quantitative and qualitative research methods. This report is organized into three main sections. The first section details the existing demographic, economic and real estate market conditions in South Fulton and provides projections for future growth. The second section provides the analysis of our multi-faceted approach to community input, including a summary of a resident survey, a business survey, business interviews as well as focus group and 'SWOT' analysis sessions with community members. Findings from our analysis of the data describing existing conditions and trends and our analysis of community input serves as the basis of the action plan, which is the third and final section of this report. All three sections of the report are summarized below.

Existing Conditions and Trends

- South Fulton has approximately 100,176 residents and 36,171 households, and has experienced particularly fast growth in recent years

- By 2040, South Fulton's population is expected to grow to 124,114, which would represent a 23.9 percent increase since 2019. Household growth is projected to be 29.2 percent by 2040. These rates are comparable to, but slightly lower than, rates in Fulton County and metro Atlanta

- South Fulton is comprised of a relatively larger share of family households than Fulton County and the Atlanta Metro Area, which results in relatively large average household size of 2.76. This is also reflected in the age distribution in South Fulton, where the largest age cohorts are under 18 and those aged between 35 and 44

- The fastest growing age cohort in South Fulton is comprised of residents 65 or older, with other growing age cohorts including those between ages 18 and 24, 45 and 54, and 55 and 64

- The population of South Fulton is predominantly comprised of black/African American residents (89.5 percent). Approximately 5.1 percent of residents identify as white, while 2.5 percent identify as Hispanic/Latino

- From 2010 to 2019, the number of black/African American residents in South Fulton increased by 19.3 percent, the number of white residents increased by 9.3 percent, and the number of Hispanic/Latino residents increased by 7.1 percent

- South Fulton has a larger percentage of households in middle income categories than both Fulton County and the Atlanta Metro Area, which have greater number of households in very low- and very high-income categories

- A larger portion of South Fulton homeowner households are spending more than 30 percent of their gross income on housing costs (i.e. "cost-burdened") than Fulton County or the Atlanta Metro Area. South Fulton renter households are also disproportionately cost-burdened as compared to the surrounding geographies

- Nearly 92 percent of South Fulton residents aged 25 or older have at least a high school diploma. This is comparable to the high school diploma attainment rate in Fulton County and slightly higher than that of the Atlanta Metro Area

- While slightly higher than the county, metro area and nationally, South Fulton experienced the steepest decline in unemployment, falling from 10.4 percent in 2013 to 5.2 percent in 2018

- South Fulton has a notably larger share of residents working in transportation and warehousing than surrounding geographies, and these industries also accounted for most of the job growth in the city

- Approximately half of South Fulton residents work in Fulton County. However, only 3 percent of South Fulton residents work in the City itself, while 30.6 percent work in the city of Atlanta. Approximately 26.9 percent of South Fulton workers commute from locations within Fulton County. Approximately 7.9 percent of South Fulton workers also live in South Fulton, while 9.8 percent live in Atlanta

- Approximately two-thirds of housing units in South Fulton are owner-occupied while 26.3 percent are renter-occupied. By contrast, the county and metro area have larger proportions of renter-occupied housing units, although they also have much higher rate of vacant housing units

- From 2010 to 2018 the number of owner-occupied and renter-occupied units increased while vacant units decreased in South Fulton, Fulton County and the Atlanta metro area. However, in South Fulton, the growth rate of owner-occupied units was markedly higher than in the county and metro area

- In South Fulton, nearly three quarters of market-rate multifamily rental units have two or more bedrooms, which is a much higher rate than in Fulton County and the metro area. As of the first quarter of 2019, the average rent for a two-bedroom unit in South Fulton was $1,019, as compared to $1,502 in Fulton County and $1,286 in the

Atlanta Metro Area

- From 2010 to 2018, South Fulton experienced no market-rate multifamily unit development. By contrast, Fulton County and the Atlanta Metro Area experienced significant rates of multifamily development every year from 2013 to 2018

- In South Fulton, more than 88 percent of homes sold between April 2018 to March 2019 were single family homes, while 10.4 percent were townhomes and 1.2 percent were condominiums. This is similar to the Atlanta Metro Area

- The median sale price of a single family home in South Fulton was $186,450 during the April 2018 – March 2019 period, as compared to $279,000 in Fulton County and $223,000 in the Atlanta Metro Area. The highest priced homes sold in Q1 of 2019 were in the northwest of the South Fulton

- According to CoStar, there are approximately 2.6 million square feet of retail space in South Fulton. From 2010 to 2016, retail rents in South Fulton were relatively stable; however, between 2016 and 2017, the average annual retail rent declined by 31 percent, falling from $13.56 to $9.36. In the first quarter of 2019, the average annual retail rent per square foot was lower in South Fulton ($10.44) than in Fulton County ($17.76) and in the Atlanta Metro Area ($14.40)

- Office vacancy rates in South Fulton are significantly lower than in the surrounding geographies (5.5 percent), although this also reflects the limited supply of office space in the city

- Industrial/flex rents in South Fulton fluctuated between 2010 – 2018. As of the first quarter of 2019, the average annual industrial/flex rent in South Fulton was $3.60, as compared to $5.04 in Fulton County and $4.80 in the Atlanta Metro Area. In the first quarter of 2019, South Fulton's industrial/flex vacancy rate was 10.0 percent, as compared to 5.5 percent in both the county and the metro area

- Westlake High School earned the highest Career and College Readiness Index (CCRI) Single Score in South Fulton in 2018; this score was equivalent to the median score in Fulton County as a whole. Overall, South Fulton schools performed lower on career- and college-readiness than other schools in the county. However, the graduation rate at Westlake High School and was above the median for Fulton County at 92.3 percent.

- Among South Fulton's elementary schools, seven out of 13 obtained scores at or above the county median. Two out of the five middle schools in the city performed above the county median

- While there is access to public transportation in east and north South Fulton, the central-west and southwest portions of the city lack convenient access to these services

- South Fulton residents have access to several Atlanta-region workforce development opportunities, including state and federal programs. The city of South Fulton provides business support, and will open a Small Business Resource Center & Incubator in Spring 2020

- Notable planned development in the city include a 220-apartment workforce housing project a $27 million expansion of Halpern's Steak and Seafood company manufacturing and distribution center that will support 46 new jobs, a 67,000 square foot Publix, a senior living community and a $60 million Job Corps campus

- Nine focus areas within South Fulton have been identified for development, redevelopment and/or revitalization, and are dispersed throughout the City. Each focus area is associated with projects that are either ongoing or planned for in the near to long-term future

- South Fulton's peer localities enjoy a range of economic development support. In some places, such as Union City, state-level programs (notably the Georgia State Opportunity Zone tax credit program) account for the majority of economic incentives available to businesses; others, such as College Park and Sandy Springs, offer more robust incentive programs through local economic development departments or authorities. Most municipalities offer some form of site selection assistance, though the range and type of that assistance varies

Community Input

- Residents and businesses identified the proximity to Hartsfield-Jackson Airport as the main strength of the city, as well its proximity to Atlanta and the active engagement of residents

- Residents and business were critical of number of warehouses in South Fulton, especially compared to the lack of other kinds of businesses

- Both residents and businesses identified crime as a weakness and something to be addressed, in terms of both the physical presence of crime and as a potential threat to the reputation of the city

- In general, businesses and residents see great potential for new development based on the availability of land

- Restaurants are seen as a particularly viable opportunity for the city, as the city currently lacks the kinds of restaurants residents would like to see and also because of the strength of the farming industry in the city

Action Plan: Recommendations

- The proposed Action Plan builds on the identified strengths and opportunities of the city, while also addressing weaknesses and vulnerabilities that the city is facing

- There are five overall recommendations that include both program and practice aspects. Each overall recommendation is broken down into an actionable list of specific recommendations that includes proposed lead parties for executing and implementing the item, as well as timing.

- The five overall recommendations in the Action Plan are:
    - Expand marketing and promotion of the city's business assets and development potential
    - Prime existing businesses in South Fulton for growth and expansion
    - Strengthen partnerships between city of South Fulton and the business community to augment economic development effort and address community issues
    - Work to attract more technology and professional services and other high value industries
    - Expand the city of South Fulton's economic development organization

- Recommendations are also proposed for specific sites, primarily those identified as Economic Opportunity Focus Areas. The city will incorporate these site-specific recommendations, to the extent possible, into the zoning recommendations also being put forward in January 2020

- For each site, the establishment of a Tax Allocation District (TAD) would greatly increase the odds of development or redevelopment of Economic Opportunity Focus Areas

- One notable site recommendation is regarding the construction of a permanent city hall. The city wishes to make the government offices part of a town center with mixed uses potentially including residential (medium-high density), restaurants, retail, office, and possibly a hotel and conference center. After reviewing a number of sites for the

town center, a 400-acre parcel located along Camp Creek Parkway and Enon Road, that lies in both Council District 2 and District 4, would be the most suitable location for the town center

- The Town Center would be a public-private partnership (P3), that could take five plus years to fully implement. The city should consider hiring a P3 expert to advise the city on planning process and negotiating development agreements between the government and developers

- South Fulton has been notified of designation as a Main Street programs for the Red Oak Historic District and Old National Highway. Immediate steps to be taken include hiring Main Street Managers and implementing the program. Benefits include the opportunity to connect and network with other downtown and commercial district revitalization professionals from across the country

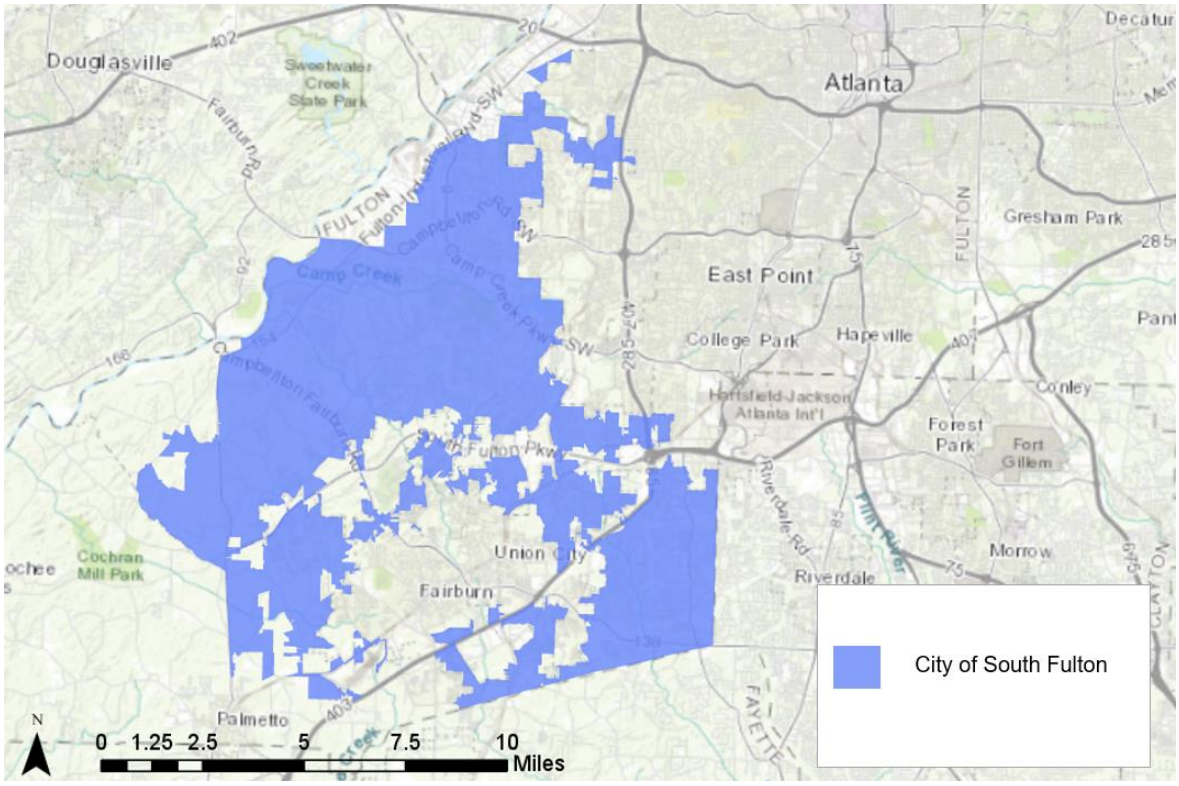
METHODOLOGY

The subsections below discuss the geographies that the analysis focuses on as well as the data sources that were used.

Geographies

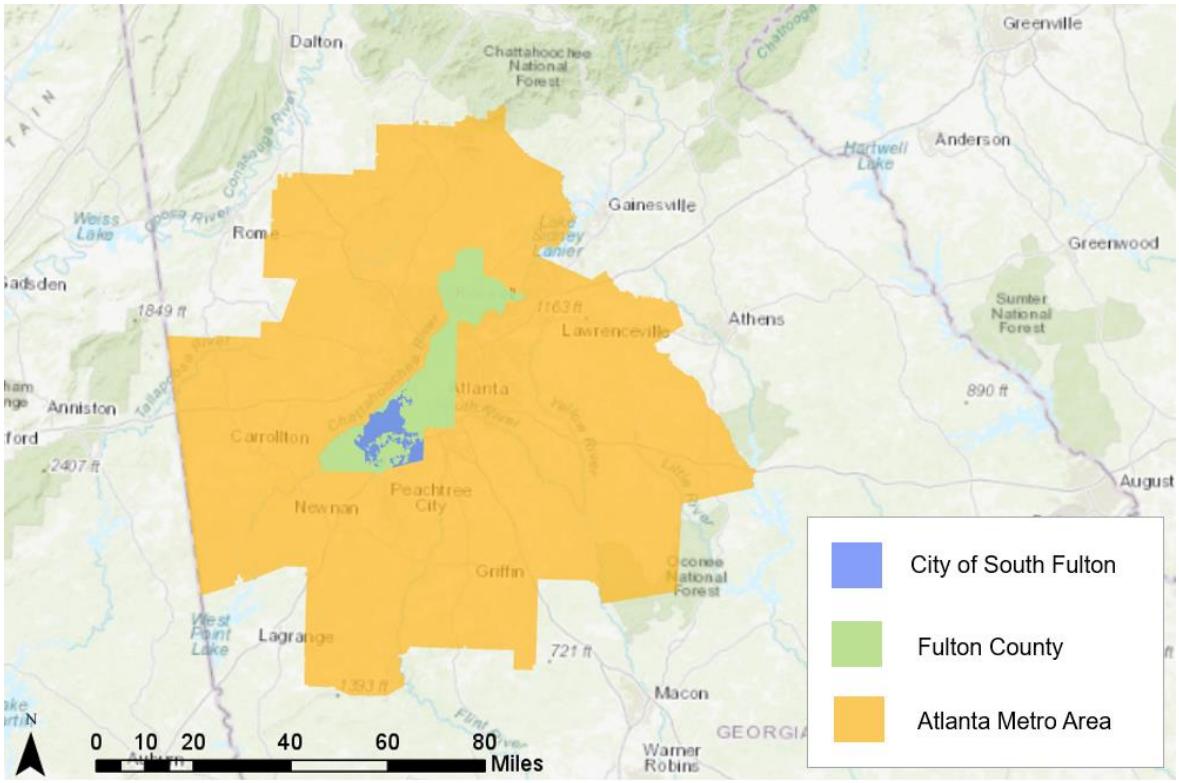
The analysis studies demographic, economic, and real estate market conditions and trends in the city of South Fulton (shown in Figure 1). For purposes of comparison, conditions and trends were also analyzed in Fulton County and the Atlanta Metro Area (shown in Figure 2). The Atlanta Metro Area consists of the 29 counties that make up the Atlanta-Sandy Springs-Roswell Metropolitan Statistical Area, which are listed in Exhibit A-1 in the Appendix.

Figure 1: City of South Fulton



Sources: City of South Fulton; Arc GIS Pro; BAE, 2019.

Figure 2: City of South Fulton, Fulton County, and the Atlanta Metro Area



Sources: U.S. Census Bureau; City of South Fulton; Arc GIS Pro; BAE, 2019.

Data Sources

BAE utilized the following data sources to complete the analysis and plan:

- **U.S. Census Bureau**: Jurisdictional boundaries were obtained from the U.S. Census Bureau Geography Program. BAE also utilized demographic data from the U.S. Census Bureau American Community Survey (ACS) as well as commute data from the U.S. Census Bureau Longitudinal Employer-Household Dynamics program (LEHD)

- **Esri Business Analyst**: Demographic data was obtained from Esri Business Analyst, a third-party tool that provides demographic, economic, and spatial data which is verified against U.S. Census data as well as other public sources

- **Georgia Department of Labor:** Information about South Fulton's top employers was obtained from the Georgia Department of Labor

- **Atlanta Regional Commission**: Population, household, and employment growth projections for the city of South Fulton, Fulton County, and the Atlanta region are based on the most recent projections published by the Atlanta Regional Commission (ARC)

- **RealtyTrac**: Estimated home foreclosure Rates for South Fulton, Fulton County, and the Atlanta metro area were obtained from RealtyTrac, a real estate information company and an online marketplace for foreclosed and defaulted properties

- **CoStar**: Data about multifamily rental housing, retail and office inventory, rents, vacancy rates, and absorption rates were obtained through CoStar, a third-party provider of real estate market data

- **CoreLogic Group**: Data about home sales were obtained from CoreLogic, a third-party vendor of property sales data. BAE purchased the CoreLogic data sets from DQNews, an aggregator of CoreLogic data sets

EXISTING CONDITIONS AND TRENDS

Demographic and Economic Conditions and Trends

The following section reviews demographic conditions and trends in South Fulton, Fulton County, and Atlanta Metro Area. This includes information about population and households, household composition, age, race/ethnicity, educational attainment, household income, housing cost burdens, resident employment and commute patterns, and local jobs.

Population and Households

As shown in Table 1, the city of South Fulton has approximately 100,176 residents and 36,171 households. From 2010 to 2019, the city's population grew by 19 percent. This population growth rate is notably higher than that of Fulton County and the Atlanta Metro Area during the same period, which experienced population growth rates of 15.2 percent and 13.2 percent, respectively. South Fulton's household growth rate during the 2010 – 2019 time period was 17.8 percent, as compared to 16.1 percent in the county and 12.9 percent in the Atlanta Metro Area.

The average household size in South Fulton is 2.76, which is larger than the average household in Fulton County (2.35) and the Atlanta Metro Area (2.69). From 2010 to 2019, the average household size grew in all three geographies.

Table 1: Population and Households, 2010 – 2019

Population	2010	2019	% Change 2010-2019
South Fulton (a)	84,211	100,176	19.0%
Fulton County (b)	920,581	1,060,373	15.2%
Atlanta Metro Area (c)	5,286,728	5,986,262	13.2%

Households	2010	2019	% Change 2010-2019
South Fulton	30,694	36,171	17.8%
Fulton County	376,377	436,970	16.1%
Atlanta Metro Area	1,943,885	2,195,115	12.9%

Average Household Size	2010	2019
South Fulton	2.73	2.76
Fulton County	2.36	2.35
Atlanta Metro Area	2.68	2.69

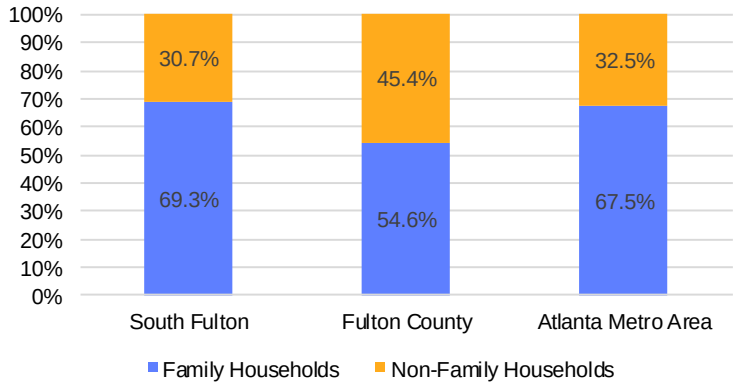
Notes:
(a) City of South Fulton, Georgia. Boundaries obtained through Fulton County GIS Portal.
(b) Fulton County, Georgia. U.S. Census Bureau.
(c) Atlanta-Sandy Springs-Roswell, GA Metropolitan Statistical Area. U.S. Census Bureau.

Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Household Composition

As illustrated by Figure 3, over 69 percent of households in South Fulton are comprised of families. In contrast, only 54.6 percent of households in Fulton County are family households. The breakdown of family households versus non-family households in the Atlanta metro area is comparable to that of South Fulton, where 67.5 percent of households are family households. This is likely driven by the fact that a significant portion of Fulton County is comprised of urbanized areas likely to attract young people and single-person households, while the metro area contains a larger share of suburban areas that are likely to attract families.

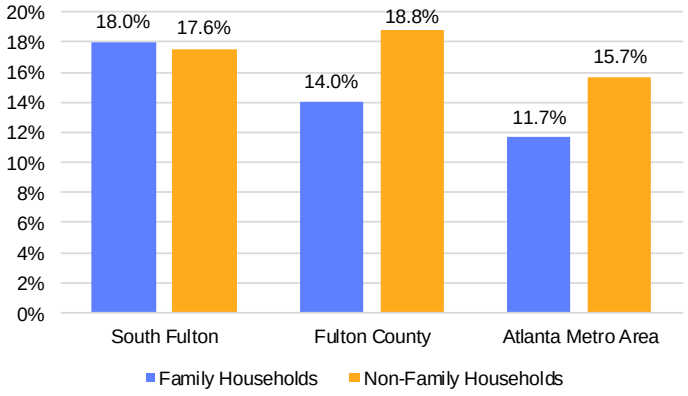
Figure 3: Household Composition, 2019



Sources: Esri Business Analyst; BAE, 2020.

As shown in Figure 4, from 2010 to 2019, family households and nonfamily households in South Fulton grew at almost the exact same rate (between 18 and 17.6 percent). In contrast, in both Fulton County and the Atlanta metro area, nonfamily households grew at significantly higher rates than family households.

Figure 4: Percent Change in Number of Households by Household Composition, 2010 – 2019

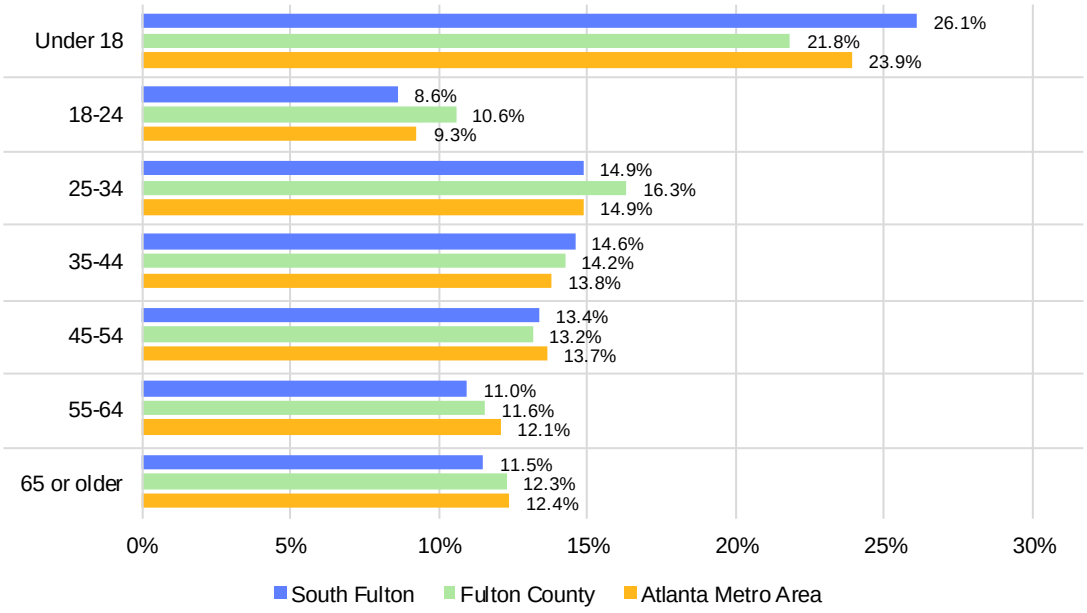


Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Age

Figure 5 illustrates the breakdown of the population of each geography by age group. In South Fulton, 26.1 percent of residents are under the age of 18, as compared to 21.8 percent of residents in Fulton County and 23.9 percent of residents in the Atlanta Metro Area. South Fulton also has a slightly larger share of residents aged 35 to 44 than the county and metro area. South Fulton's relatively large proportions of children and adults aged 35 to 44 is attributable to the city's relatively large share of family households.

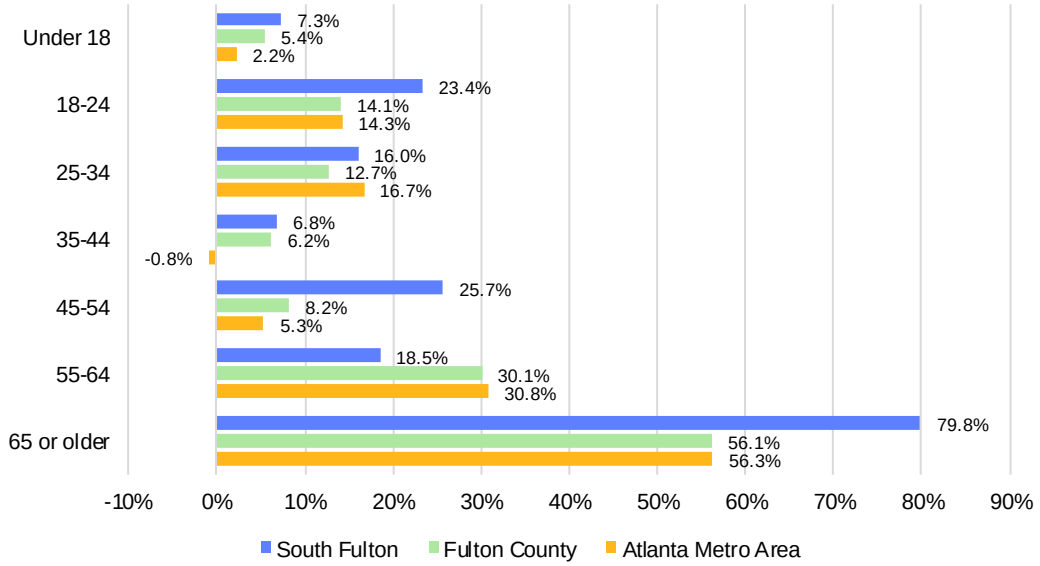
Figure 5: Age Distribution, 2019



Sources: Esri Business Analyst; BAE, 2020.

Figure 6 illustrates the percent change in residents by age group from 2010 to 2019. The city of South Fulton experienced population growth across all age groups during this period. The city's fastest-growing age cohort is comprised of residents aged 65 or older (68.5 percent growth). Other age groups that experienced relatively high growth during this period are 18 to 24 (24.0 percent growth) and 45 to 54 (22.0 percent growth), and 55 to 64 (18.2 percent growth).

Figure 6: Percent Change in Population by Age Group, 2010 – 2019

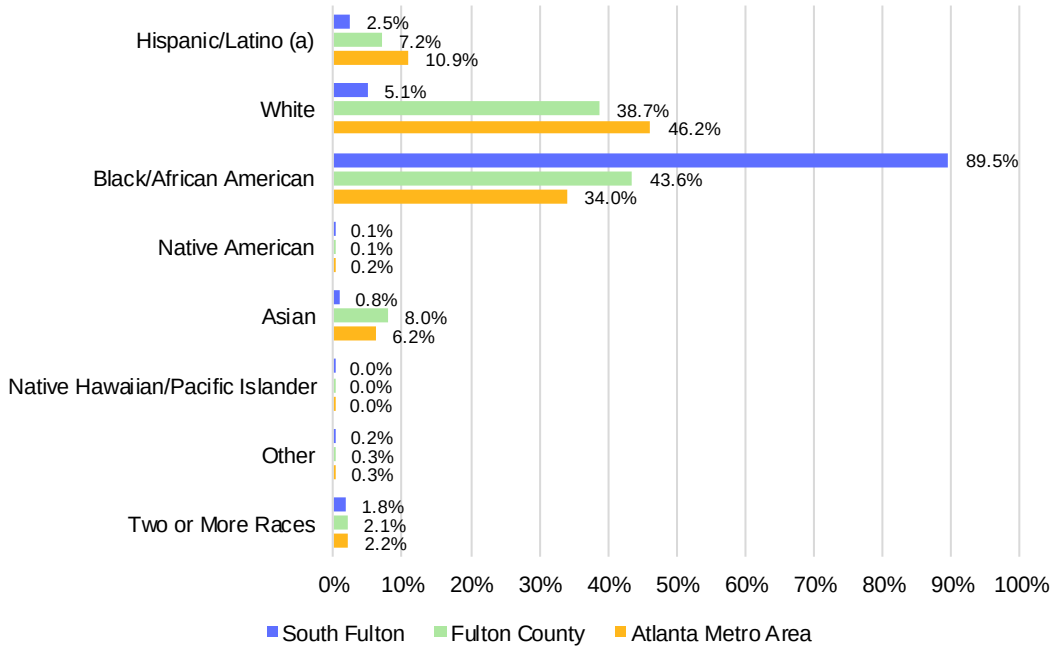


Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Race and Ethnicity

Figure 7 illustrates the population distribution by race and ethnicity in all three geographies. South Fulton is predominantly black/African-American (89.5 percent). Approximately 5.1 percent of residents identify as white, while 2.5 percent identify as Hispanic/Latino.

Figure 7: Race and Ethnicity, 2019

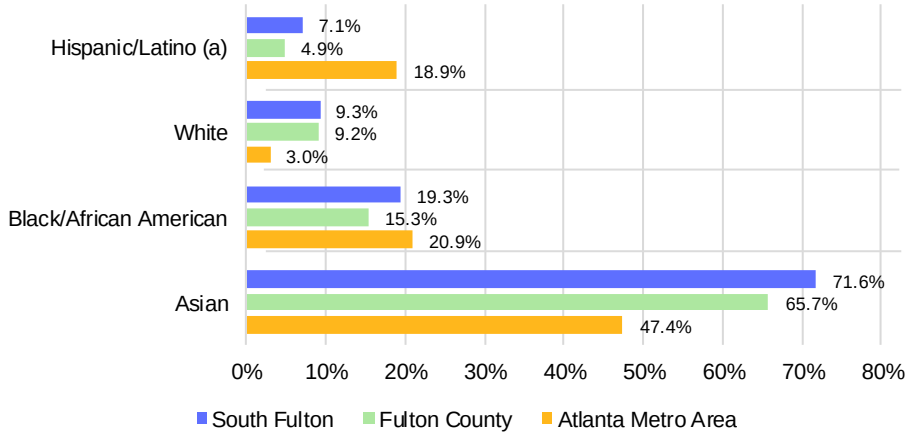


Notes:
(a) Includes all races for those of Hispanic/Latino background.

Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Figure 8 shows the percent change in residents by race and ethnicity from 2010 to 2019 for major racial/ethnic groups.[1] In South Fulton, the Asian population grew by 71.6 percent; however, this group only comprised 0.8 percent of South Fulton residents in 2019 and so the actual increase in the number of Asian residents is minimal. From 2010 to 2019, the number of black/African-American residents in South Fulton increased by 19.3 percent, the number of white residents increased by 9.3 percent, and the number of Hispanic/Latino residents increased by 7.1 percent. This shows South Fulton is becoming increasingly ethnically and racially diverse.

Figure 8: Percent Change in Population by Race/Ethnicity, 2010 – 2019



Notes:
Only includes race/ethnicity groups that comprise at least three percent of the population in at least one geography.
(a) Includes all races for those of Hispanic/Latino background.

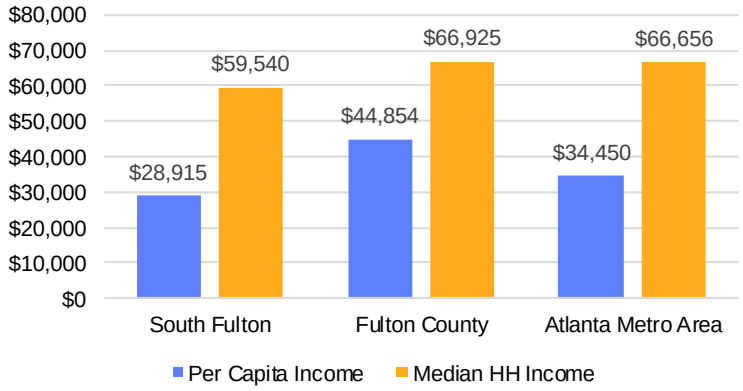
Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

[1] Major racial/ethnic groups are defined as groups that comprise at least three percent of the population in at least one of the three geographies.

Income

As shown in Figure 9, the per capita income in South Fulton is $28,915, which is 33.5 percent lower than that of Fulton County as a whole ($44,854) and 13.4 percent lower than that of the Atlanta Metro Area ($34,450). South Fulton's median household income is $59,540. While this is lower than the median household incomes of the county ($66,925) and the metro area ($66,656), the income gap between South Fulton and the surrounding geographies is less pronounced with respect to household incomes than it is with respect to per capita incomes. This is driven by the relatively large proportion of family households in South Fulton, which results in fewer single-earner households.

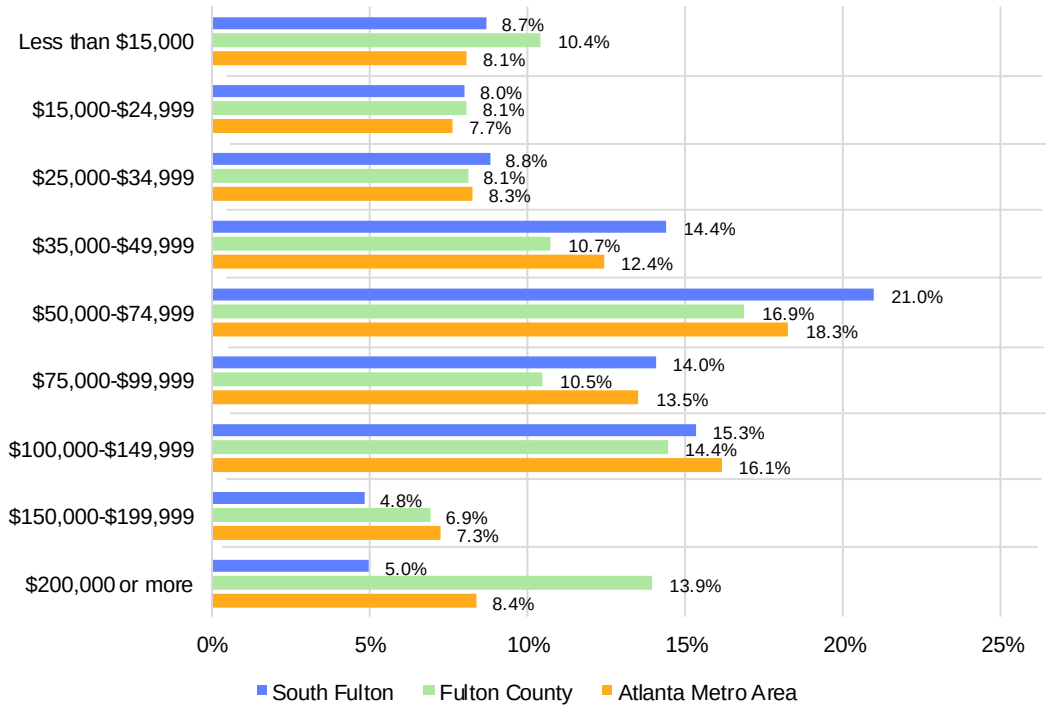
Figure 9: Per Capita Income and Median Household Income



Sources: Esri Business Analyst; BAE, 2020.

As shown in Figure 10, while half (50.3 percent) of South Fulton households earn between $50,000 and $150,000 annually, as compared to 41.8 percent of Fulton County households and 47.9 percent of Atlanta metro area households, South Fulton has a smaller proportion of households that earn more than $150,000 annually as compared to the surrounding geographies. However, Fulton County has a larger percentage of households earning less than $15,000 annually than the city of South Fulton or the metro area. In addition, while all three geographies have similar numbers of households earning between $15,000 and $34,999, South Fulton has a greater number of households earning between $35,000 and $49,999. Therefore, South Fulton has a larger percentage of households in middle income categories than both Fulton County and the Atlanta metro area, which have greater number of households in very low- and very high-income categories.

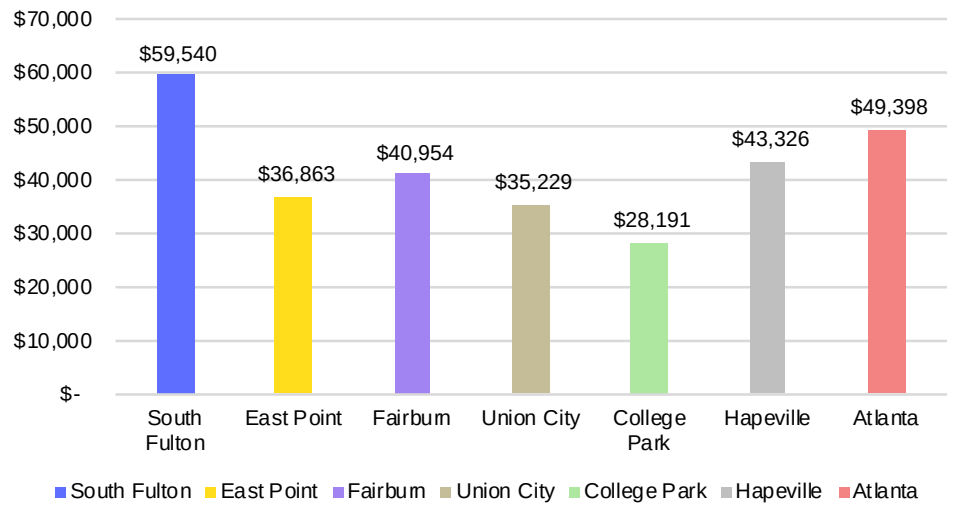
Figure 10: Household Income Distribution, 2019



Sources: Esri Business Analyst; BAE, 2020.

The median household income in South Fulton is notably higher than peer cities in the Atlanta metro area. The median household income in South Fulton is over $10,000 higher than in the city of Atlanta, Hapeville, College Park, Union City, Fairburn, and East Point. This is shown in Figure 11.

Figure 11: Median Household Income of Peer Regional Cities, 2018



Source: City of South Fulton; BAE 2020

Poverty Rates

As shown in Table 2, approximately 12.2 percent of households in South Fulton are below the poverty line (3,815 households). South Fulton's poverty rate is slightly lower than that of Fulton County (14.0 percent) and the Atlanta metro area (12.5 percent).

Table 2: Poverty Rates, 2013 – 2017 Five-Year Sample Data

Geography	# of HHs with Income Below Povery Line	Total # of HHs (a)	% of HHs in Poverty
South Fulton	3,850	31,662	12.2%
Fulton County	54,843	391,850	14.0%
Atlanta Metro	253,099	2,029,045	12.5%

Notes:
(a) Includes only the households for which income data are known.

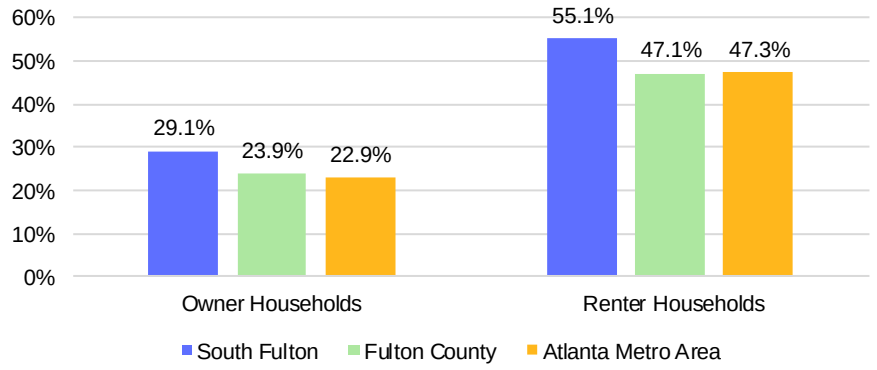
Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Housing Cost Burdens

According to criteria defined by the U.S. Department of Housing and Urban Development (HUD), a household is considered housing cost-burdened if it spends more than 30 percent of its gross income on housing costs. For renters, this includes rent and utilities; for homeowners this includes mortgage payments, property taxes, insurance, and other associated costs.

Figure 12 indicates the percentage of households that are cost-burdened by tenure in each geography. In South Fulton, approximately 29.1 percent of homeowner households are housing cost-burdened, as compared to 23.9 percent of Fulton County homeowner households and 22.9 percent of Atlanta metro area households. South Fulton renter households are also disproportionately cost-burdened as compared to the surrounding geographies. Approximately 55.1 percent of renter households in South Fulton are cost-burdened, as compared to 47.1 percent of renter households in Fulton County and 47.3 percent of renter households in the Atlanta metro area.

Figure 12: Cost-Burdened Households by Tenure, 2013 – 2017 Five-Year Data



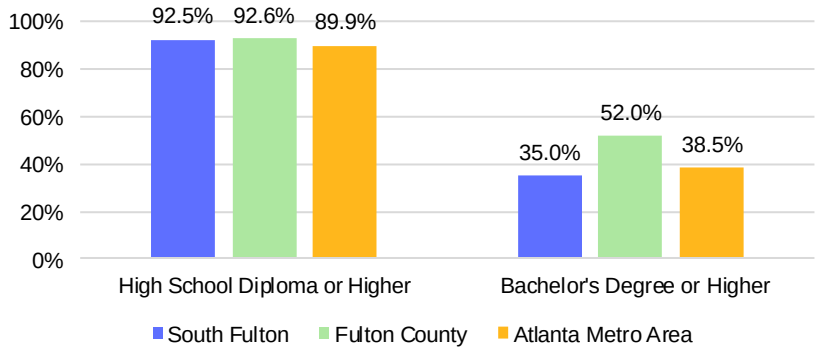
Note: "Cost-burdened" households are those which pay at least 30% of their income in rent or homeowner costs.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data;
Esri Business Analyst; BAE, 2020.

Educational Attainment

As shown in Figure 13, over 92 percent of South Fulton residents aged 25 or older have at least a high school diploma. This is comparable to the high school diploma attainment rate in Fulton County (92.6 percent) but slightly higher than that of the Atlanta metro area (89.9 percent). Approximately 35 percent of South Fulton residents aged 25 or older hold a bachelor's degree or higher; this is significantly lower than in Fulton County (52 percent) and slightly lower than in the metro area (38.5 percent).

Figure 13: Educational Attainment Rates, Residents Aged 25 or Older, 2019



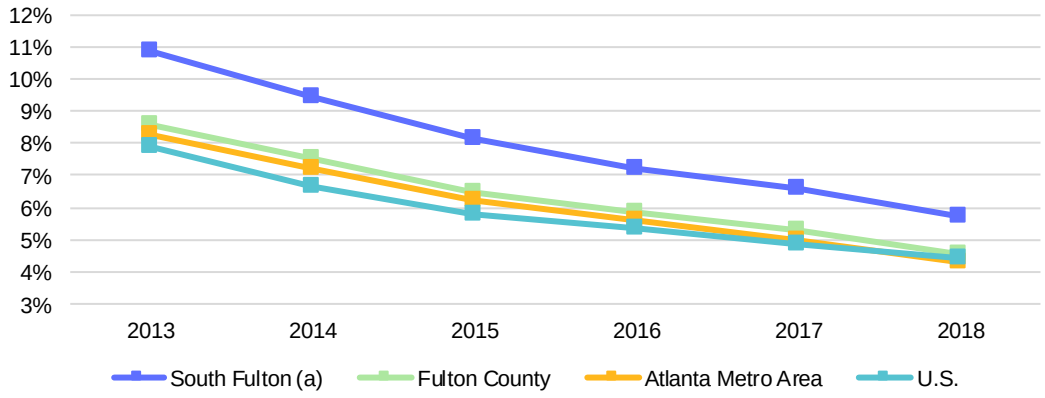
Note:
Universe is population age 25 or older. "High School Diploma or Higher" includes GED/high school equivalency.

Sources: Esri Business Analyst; BAE, 2020.

Resident Unemployment

Figure 14 illustrates the annual unemployment rates from 2013 to 2018 in South Fulton, the county, the metro area, and in the nationally. The unemployment rate declined significantly in all four geographies over the six-year time period, and the steepest decline was in South Fulton. As of 2018, the unemployment rate in South Fulton was 5.2 percent (as compared to 10.4 percent in 2013). In the county, metro area, and U.S., the 2018 unemployment rates were between 3.8 and 4.0 percent.

Figure 14: Unemployment Rate, 2013 – 2018



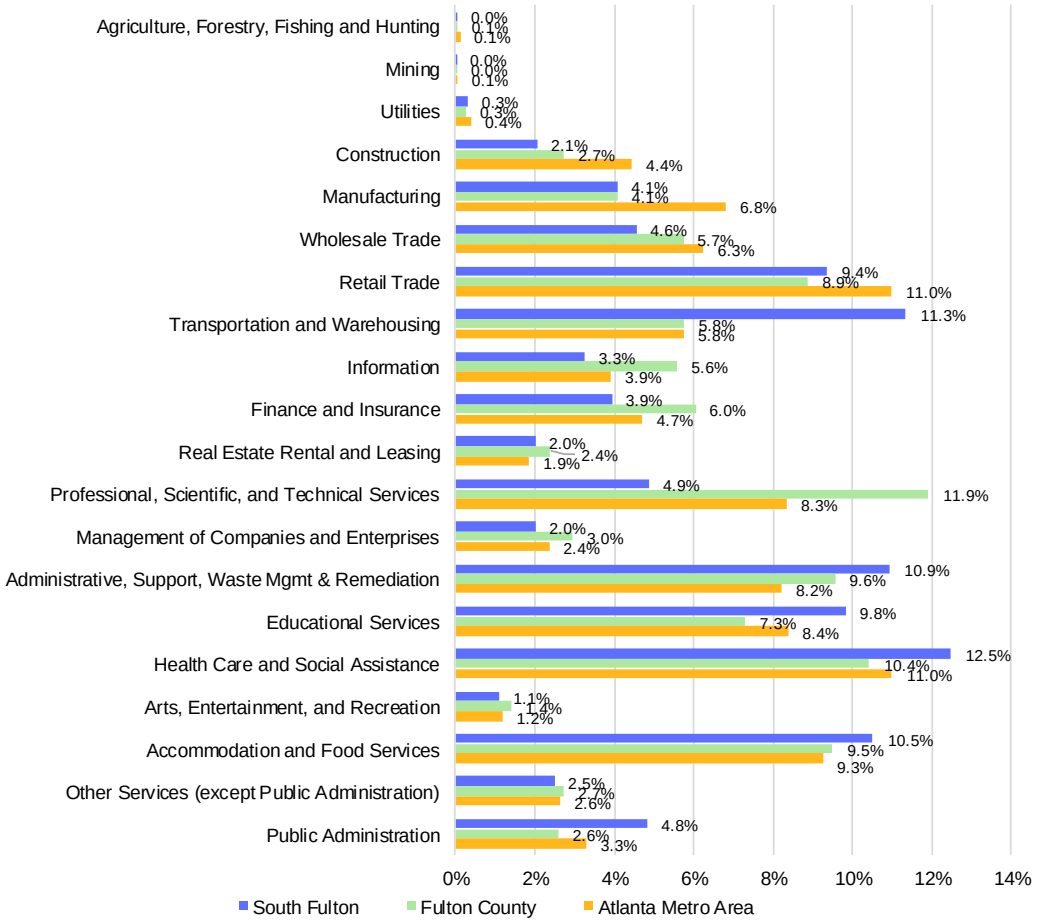
Notes:
(a) South Fulton unemployment rate reflects balance of Fulton County after subtracting Atlanta and other cities and towns for which BLS reports unemployment.

Source: Bureau of Labor Statistics; BAE 2020.

Resident Employment

Figure 15 illustrates the industries of employed residents in South Fulton, Fulton County, and the Atlanta metro area in 2017. The sectors with the largest proportions of employed South Fulton residents are health care and social assistance (12.5 percent), administrative, support, waste and management and remediation (10.9 percent), educational services (9.8 percent), transportation and warehousing (11.3 percent), accommodation and food services (10.5 percent), and retail trade (9.4 percent). As compared to the county and metro area, South Fulton has notably larger proportions of residents employed in transportation and warehousing, healthcare and social assistance, and public administration, as well as notably smaller proportions of residents employed in professional, scientific, and technical services.

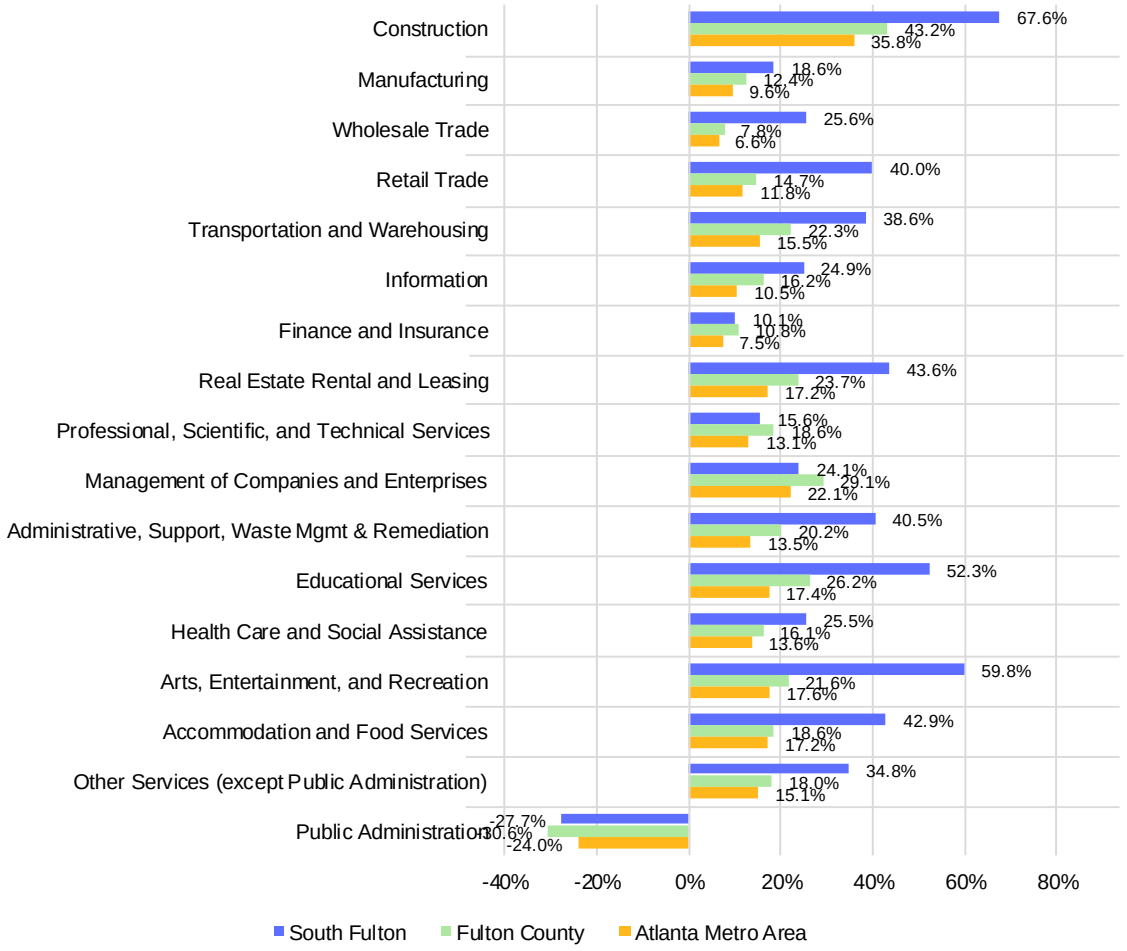
Figure 15: Resident Employment, 2017



Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Figure 16 shows the percent change in the number of employed residents in top industries[2] in South Fulton, Fulton County, and the Atlanta metro area from 2013 to 2017. In South Fulton, resident employment in nearly every job sector increased significantly during this period, with the exception of educational services and public administration. These high growth rates are driven by South Fulton's relatively high rates of population growth in recent years.

Figure 16: Change in Resident Employment by Industry, 2013 – 2017



Note: Excludes industries employing less than 0.5% of residents in any geography in 2017.

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

[2] Top industries are considered those that employ more than 0.5 percent of employed residents in at least one of the three geographies.

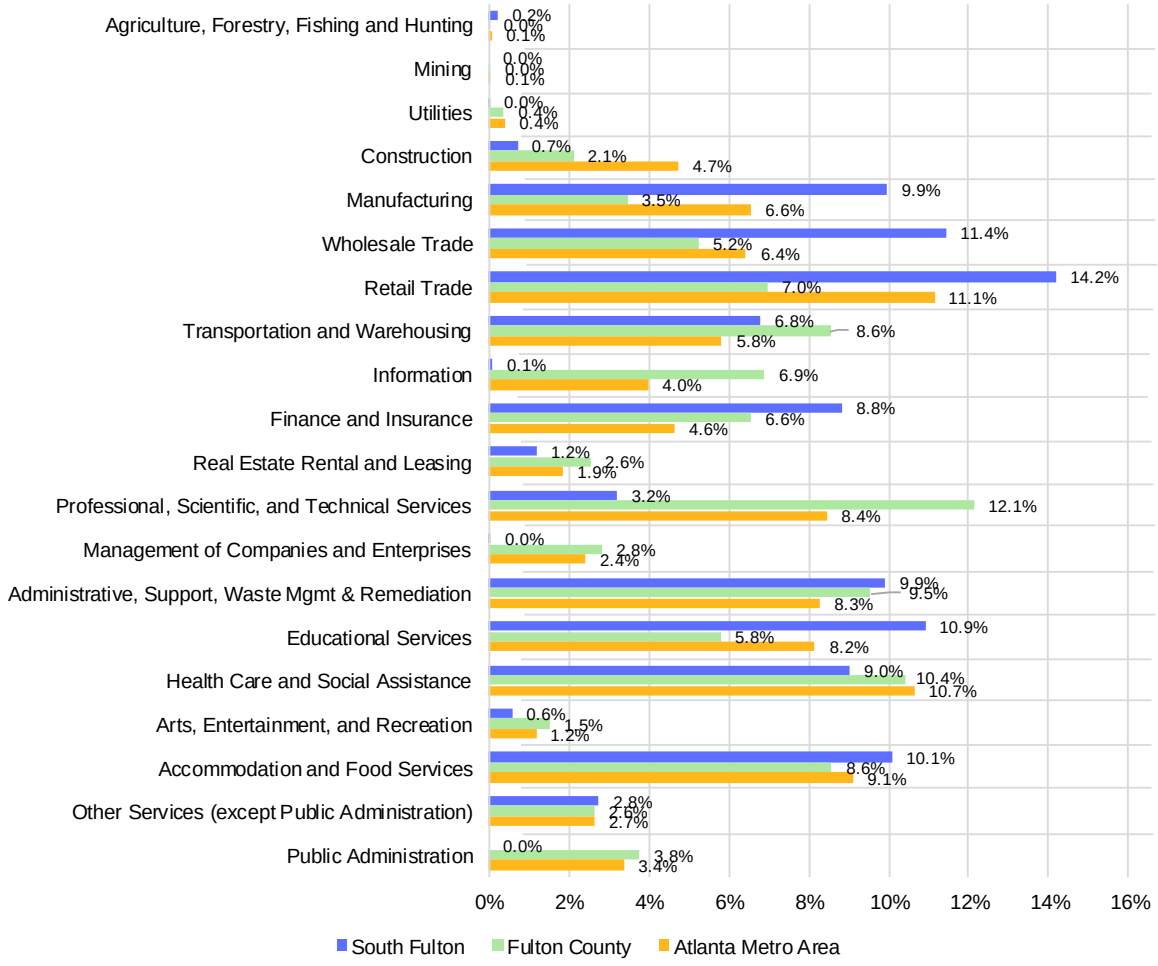
Jobs

The following section discusses local jobs within the boundaries of each geography. This includes information about the percent distribution of jobs by industry, changes in local jobs by industry over time, and a summary of major employers in South Fulton.

Jobs by Industry

Figure 17 shows the distribution of local workers by industry in South Fulton, Fulton County, and the Atlanta metro area in 2017. Over 14 percent of jobs in South Fulton are in the retail sector, compared to 7 percent in Fulton County and 11.1 percent in the Atlanta metro area. South Fulton's second-largest industry is the wholesale trade industry, which employs 11.4 percent of South Fulton's workers as compared to 5.2 percent of Fulton County workers and 6.4 percent of Atlanta Metro Area workers. Other sectors that constitute relatively large proportions of South Fulton's total jobs include finance and insurance (8.8 percent of jobs), and accommodation and food services (10.1 percent).

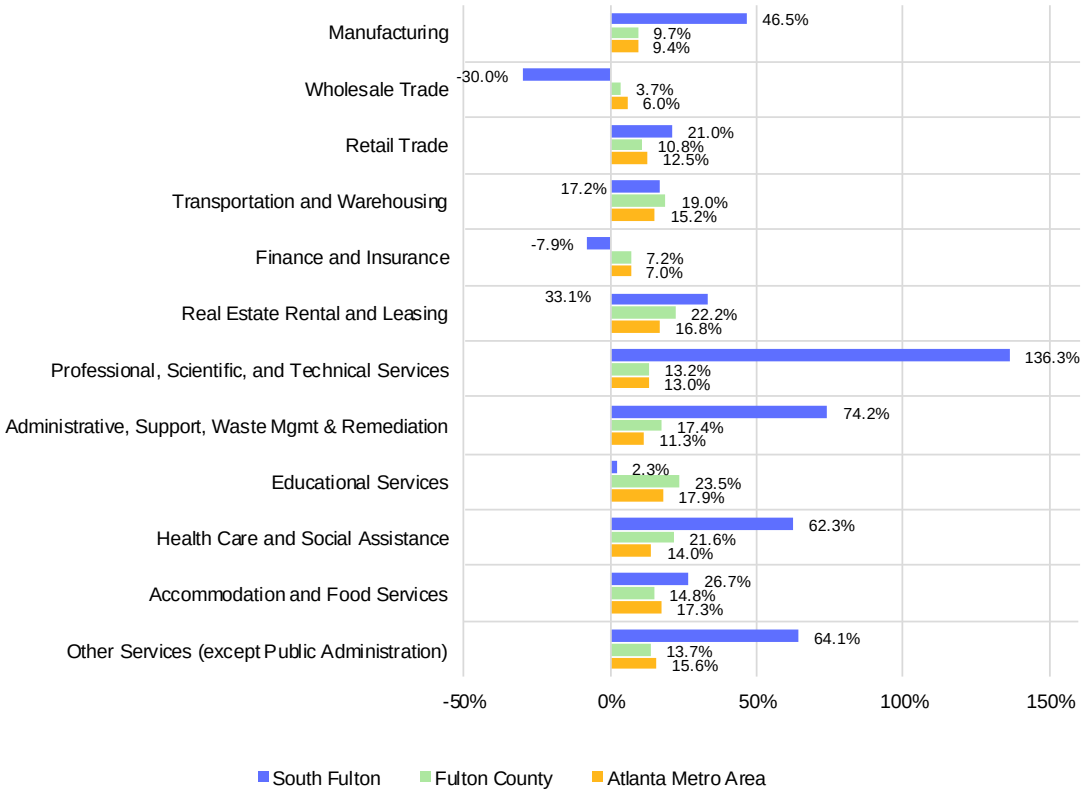
Figure 17: Worker Jobs by Industry, 2017



Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Figure 18 illustrates the percent change in jobs in top industries[3] in each geography from 2013 to 2017 by sector. In South Fulton, the industries that experienced the most job growth during this period included professional, scientific, and technical services (136.3 percent growth); administrative, support, waste management and remediation (74.2 percent growth); and other services (64.1 percent growth). Although the growth in professional, scientific, and technical services jobs reflects the relatively low number of jobs in the sector as an overall share off South Fulton jobs. The number of jobs grew from 199 to 471 in that sector between 2013 and 2017.

Figure 18: Percent Change in Workers by Industry, 2013 – 2017



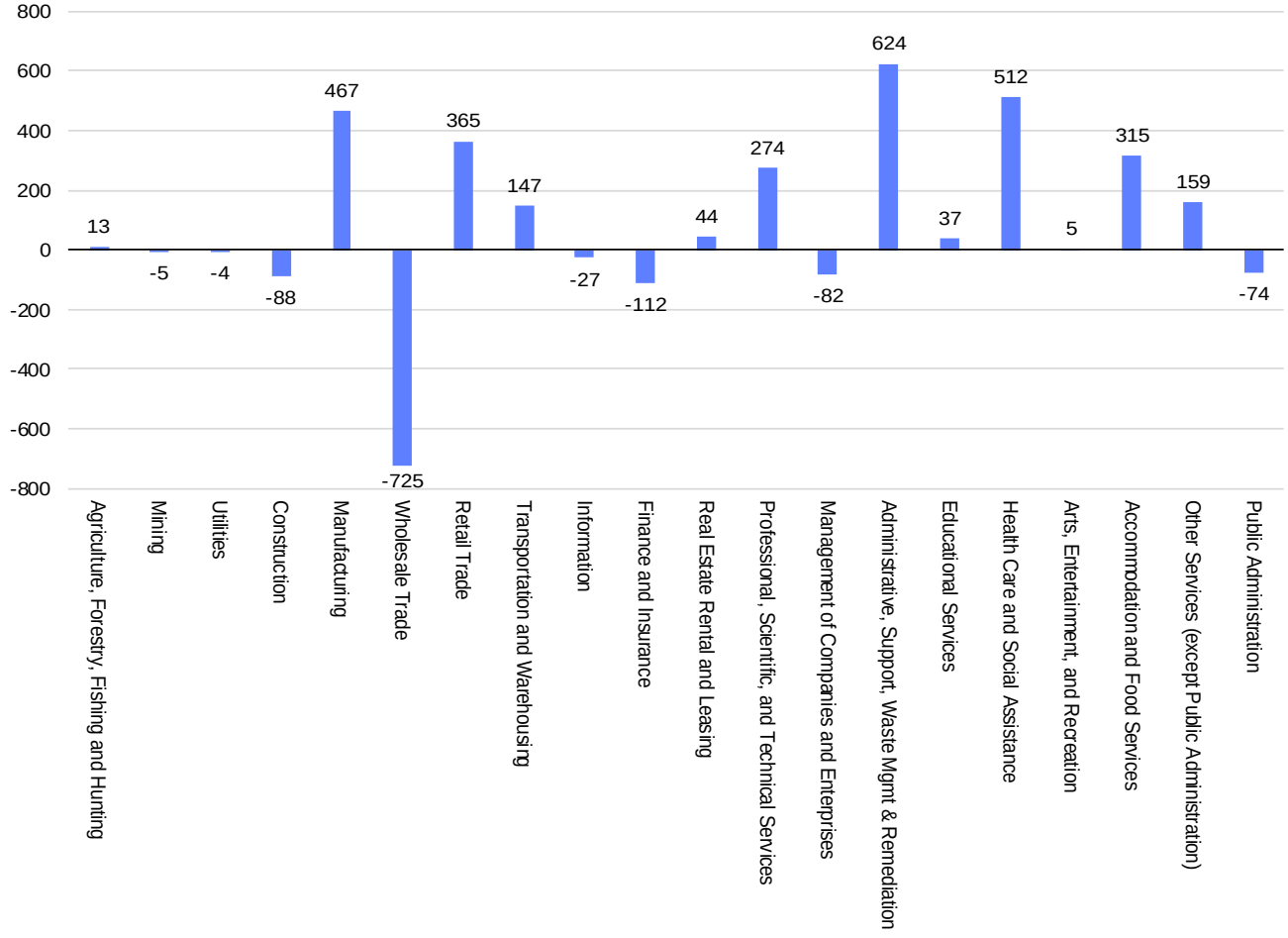
Note: Excludes industries that employed less than 0.5% of workers in all geographies in 2017.

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Figure 19 shows the change in number of jobs in each sector over the 2013 – 2017 time period. The administrative, support, waste management and remediation sector gained the most jobs (624 jobs). Other industries that gained relatively large numbers of jobs include health care and social assistance (489 jobs), manufacturing (467 jobs), and retail trade (365 jobs).

[3] Top industries are considered those that account for more than 0.5 percent of jobs in at least one of the three geographies.

Figure 19: Change in Workers by Industry in South Fulton, 2013 – 2017



Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Major Employers

Table 3 provides a list of South Fulton's major employers. The largest private employers include Bank of America, Walmart Supercenter, Kroger, and Home Depot (categorized by the Bureau of Labor Statistics as retail businesses); United Natural Foods (categorized as a wholesale business); Miller Zell (categorized as a professional services business); and World Changers Church International (categorized as "other services except for public administration"). Additionally, there are a variety of relatively large public sector organizations; most of these are schools (categorized as educational service providers).

Table 3: Major Employers in South Fulton, 2019

Employer	Size Range (a)
Private/Nonprofit Sector	
Bank of America (b)	1,000 +
Walmart Supercenter (c)	250 to 499
World Changers Church International	250 to 499
United Natural Foods	250 to 499
Miller Zell, Inc.	250 to 499
Publix Super Market	250 to 499
Kroger	100 to 249
Kroger Phrmacy (d)	100 to 249
Home Depot	100 to 249
Public Sector	
Sandtown Middle School	250 to 499
Evoline C. West Elementary School	100 to 249
Camp Creek Middle School	100 to 249
Ronald E. McNair Middle School	100 to 249
Creekside High School	100 to 249
Cliftondale Elementary School	100 to 249
Atlanta Youth Development Center	100 to 249
South Fulton Police Department (e)	100 to 249
Bear Creek Middle School	100 to 249
S.L. Lewis Elementary School	100 to 249
Mary M. Bethune Elementary School	100 to 249
Heritage Elementary School	100 to 249
Oakley Elementary School	100 to 249
A. Philip Randolph Elementary	100 to 249
Westlake High School	100 to 249

Notes:
(a) Size information drawn from Employer Profiles obtained thr***o***ugh Georgia Labor Market Explorer, Georgia Department of Labor. May not reflect current employment totals.
(b) As reported by the City of South Fulton in the Georgia Power/Esri City Snapshot
(c) Two Walmart Supercenter locations exist in South Fulton, each in the 250-499 employee range.
(d) Located at same address as Kroger, above.
(e) Appears in Labor Market Explorer as Fulton County Police Southside.

Sources: Georgia Department of Labor; City of South Fulton;
BAE, 2020.

Commute Patterns

The following section reviews commute flow data, resident commute times, and resident means of transportation to work.

Commute Flows

As shown in Table 4, approximately half of South Fulton residents work in Fulton County. Only 3 percent of South Fulton residents work in the city of South Fulton, while 30.6 percent work in the city of Atlanta. Other counties to which significant proportions of South Fulton residents commute include DeKalb County (10 percent), Cobb County (9.5 percent), and Clayton County (8.1 percent).

Meanwhile, approximately 26.9 percent of South Fulton workers commute from locations within Fulton County. Approximately 7.9 percent of South Fulton workers also live in South Fulton, while 9.8 percent live in Atlanta. Other counties from which significant proportions of South Fulton workers commute include Clayton County (11 percent), Cobb County (8.7 percent), and DeKalb County (8.5 percent).

Table 4: Commute Flows, 2017

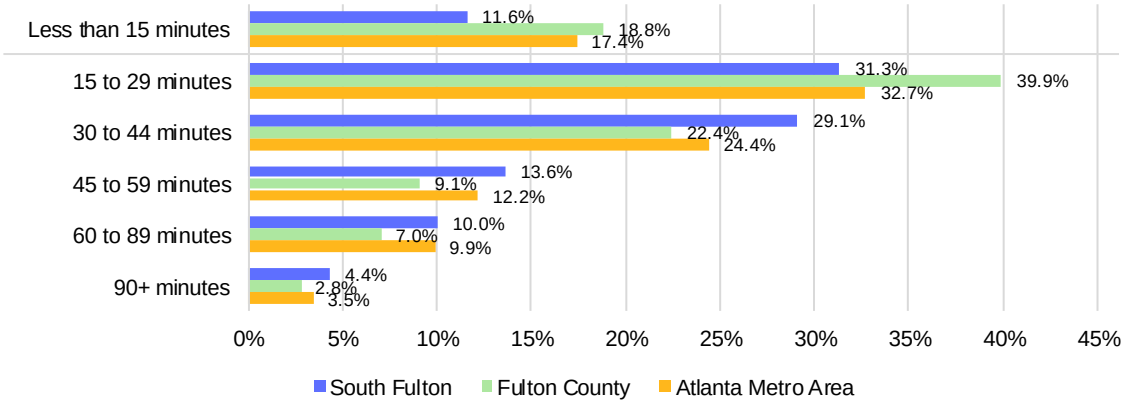
Residents by Place of Work			Workers by Place of Residence		
	Employed Residents			Workers	
Place of Work	**Number**	**Percent**	**Place of Residence**	**Number**	**Percent**
Fulton County	**19,550**	**51.2%**	**Fulton County**	**3,974**	**26.9%**
Atlanta	11,696	30.6%	Atlanta	1,451	9.8%
Sandy Springs	1,603	4.2%	South Fulton	1,166	7.9%
College Park	1,405	3.7%	Union City	328	2.2%
South Fulton	1,163	3.0%	East Point	286	1.9%
East Point City	876	2.3%	Fairburn	210	1.4%
Union City	772	2.0%	College Park	131	0.9%
Alpharetta	585	1.5%	**Clayton County**	**1,620**	**11.0%**
Hapeville	551	1.4%	**Cobb County**	**1,289**	**8.7%**
Cobb County	**3,821**	**9.5%**	Mableton	152	1.0%
Marietta	647	**1.4%**	Smyrna	151	1.0%
DeKalb County	**3,623**	**10.0%**	**DeKalb County**	**1,259**	**8.5%**
Dunwoody	544	**1.7%**	**Douglas County**	**673**	**4.5%**
Clayton County	**3,098**	**8.1%**	Douglasville	183	1.2%
Gwinnett County	**1,544**	**4.0%**	**Gwinett County**	**666**	**42.0%**
All Other Places	**6,533**	**17.1%**	**All Other Places**	**5,313**	**42.0%**
Total	**38,169**	**100.0%**	**Total**	**14,794**	**100.0%**
Live and Work in South Fulton		**3.1%**	**Live and Work in South Fulton**		**7.9%**
Live in South Fulton but Work Elsewhere		**96.9%**	**Work in South Fulton but Live Elsewhere**		**92.1%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2019.

Resident Commute Times

Figure 20 illustrates the percent distribution of resident commute times in South Fulton, Fulton County, and the Atlanta metro area. In South Fulton, 42.9 percent of employed residents spend less than 30 minutes commuting to work. By contrast, nearly 60 percent of Fulton County residents spend less than 30 minutes commuting to work, while the same is true for over half of Atlanta Metro Area residents. The majority of employed South Fulton residents (60.4 percent) spend between 15 and 44 minutes commuting to work. Nationally, the average commute time is 25.4 minutes, according to the United States Census Bureau.

Figure 20: Resident Commute Times, 2013 – 2017 Five-Year Data

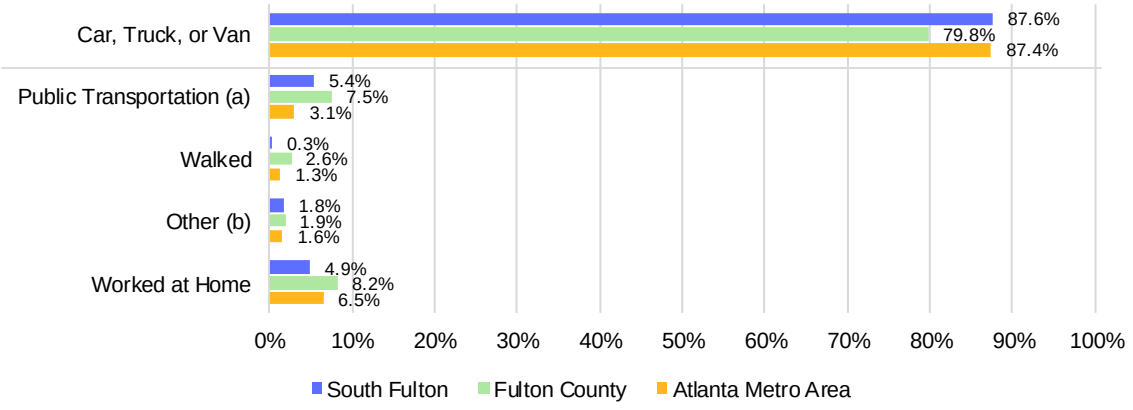


Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Means of Transportation to Work

As shown in Figure 21, approximately 87.6 percent of employed South Fulton residents drive to work, while 5.2 percent use public transportation. These trends are comparable to those observed in the county and metro area. Public transportation usage is slightly higher in Fulton County (7.2 percent) than in South Fulton and the Atlanta metro area; this is driven by the concentration of MARTA's rail network in the city of Atlanta.

Figure 21: Resident Means of Transportation to Work, 2013 – 2017 Five-Year Data



Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Projections

Table 5 shows the projected growth in population, households, and employment in all three geographies from 2018 through 2040. During this time period, the population of South Fulton is expected to grow from 100,176 to 124,114, representing an increase of 23.9 percent. The number of households is expected to grow from 36,171 to 46,195, representing an increase of 27.7 percent.

These expected growth rates are comparable to – but slightly lower than – projected rates of population and household growth in Fulton County. By contrast, the Atlanta region[4] is expected to grow at significantly faster rates. From 2018 to 2040, the region's population is expected to increase by 35.5 percent and its households are expected to increase by 48.5 percent.

[4] Atlanta Regional Commission (ARC) projection data is not available for the 29-county area defined as the Atlanta Metro Area in this report. The above data reflects projected growth for the Atlanta Region, defined as the 20 counties for which ARC produces forecasts. Exhibit A-2 in the Appendix contains a list of these 20 counties.

Table 5: Population, Household, and Employment Projections, 2018 – 2040

South Fulton (a)	**2019** (c)	**2020**	**2030**	**2040**	**# Change 2018-2040**	**% Change 2018-2040**	**Average Annual Change 2018-2040**
Population	100,176	101,070	113,357	124,114	23,938	23.9%	1.0%
Households	36,171	36,596	41,704	46,195	10,024	27.7%	1.2%
Jobs	23,467	23,925	27,892	30,205	6,738	28.7%	1.2%
Fulton County							
Population	1,060,373	1,070,581	1,197,954	1,329,810	269,437	25.4%	1.1%
Households	436,970	441,799	499,699	564,087	127,117	29.1%	1.2%
Jobs	892,594	908,674	989,538	1,061,399	168,805	18.9%	0.8%
Atlanta Region (b)							
Population	5,986,262	6,080,275	7,109,421	8,110,531	2,124,269	35.5%	1.5%
Households	2,195,115	2,232,127	2,634,529	3,039,274	844,159	38.5%	1.6%
Jobs	2,743,280	2,800,650	3,132,680	3,424,595	681,315	24.8%	1.1%

Notes:
Projected growth in population, households, and jobs was calculated by applying the Atlanta Regional Commission's average annual growth rates for the five-year/ten-year periods provided in the most recent 2015 - 2040 projections (2015 - 2020, 2020 - 2030, 2030 - 2040), assuming a 2018 base year as reported by Esri.
(a) Defined as all Traffic Analysis Zones (TAZs) that intersect with South Fulton. TAZ-level projections weighted by percentage of area overlapping South Fulton.
(b) Atlanta Region represents the sum of 20 counties for which ARC produces forecasts. This area is smaller than the 29-county Atlanta-Sandy Springs-Roswell, GA Metropolitan Statistical Area used elsewhere in this report.
(c) According to 2018 Esri estimates.

Sources: Atlanta Regional Commission, 2015; BAE, 2020.

Real Estate Market Conditions and Trends

The following section reviews the real estate markets for a variety of land uses including residential, retail, office, and industrial/flex.

Residential

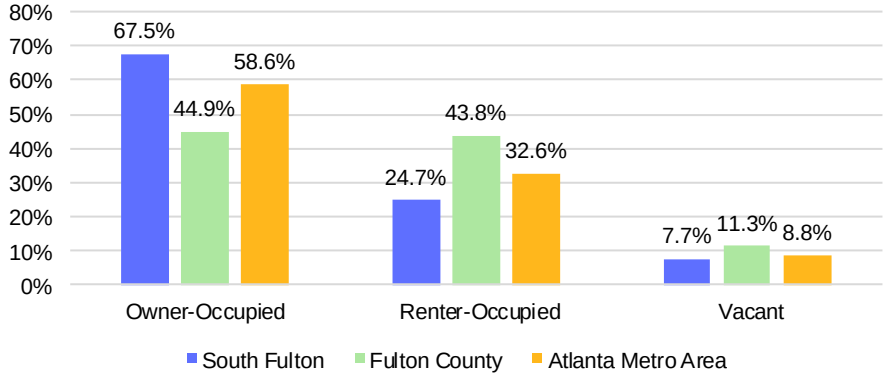
The residential real estate market conditions and trends discussed below are presented in three subsections. The first subsection covers general housing stock characteristics, the second subsection reviews the multifamily rental market, and the last subsection reviews the for-sale residential real estate market.

General Housing Stock Characteristics

Housing Tenure

As shown in Figure 22, over 67 percent of housing units in South Fulton are owner-occupied while 24.7 percent are renter-occupied. By contrast, the county and metro area have larger proportions of renter-occupied housing units (43.8 percent and 32.6 percent, respectively). In South Fulton, a smaller proportion of housing units are vacant (7.7 percent as compared to 11.3 percent in the county and 8.8 in the metro area).

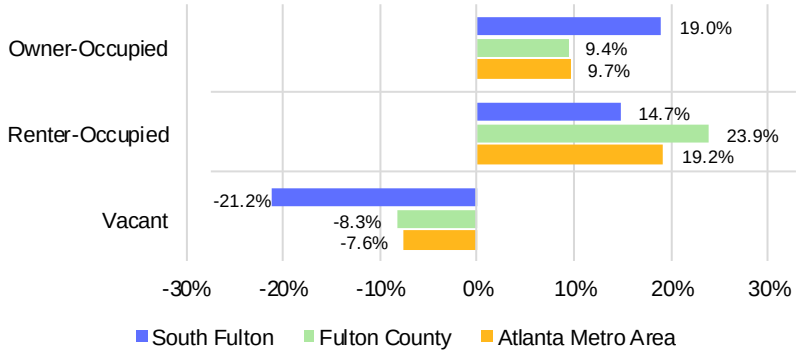
Figure 22: Housing Units by Tenure, 2019



Sources: Esri Business Analyst; BAE 2020.

Figure 23 illustrates the percent change in occupied housing units by tenure from 2010 to 2019. In all three geographies, both owner-occupied and renter-occupied units increased during this time period, while vacant units decreased. However, in South Fulton, the growth rate of owner-occupied units was markedly higher than in the county and metro area (19 percent in South Fulton versus 49.4 percent in Fulton County and 9.7 percent in the Atlanta metro area). The percent decline in vacant units was also significantly more pronounced in South Fulton during this time period than in the county and metro area.

Figure 23: Percent Change in Occupied Housing Units by Tenure, 2010 – 2019

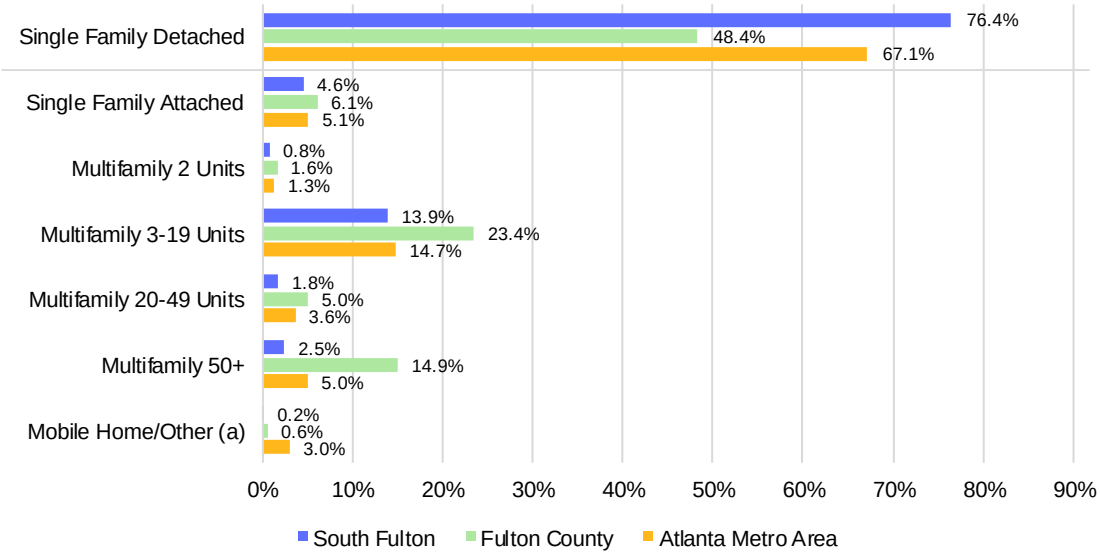


Sources: Esri Business Analyst; BAE 2020.

Units in Structure

Figure 24 illustrates the percent distribution of housing units in each geography by number of units in the building structures. In South Fulton, more than three quarters of housing units are single family homes, while 20.1 percent are in multifamily buildings. As expected, Fulton County has a larger proportion of units in multifamily units than the City of South Fulton (44.9 percent), due to the urbanized environment of large portions of the county. The breakdown of housing units in the Atlanta metro area is more comparable to that of South Fulton.

Figure 24: Housing Units by Number of Units in Structure, 2013 – 2017 Five-Year Data



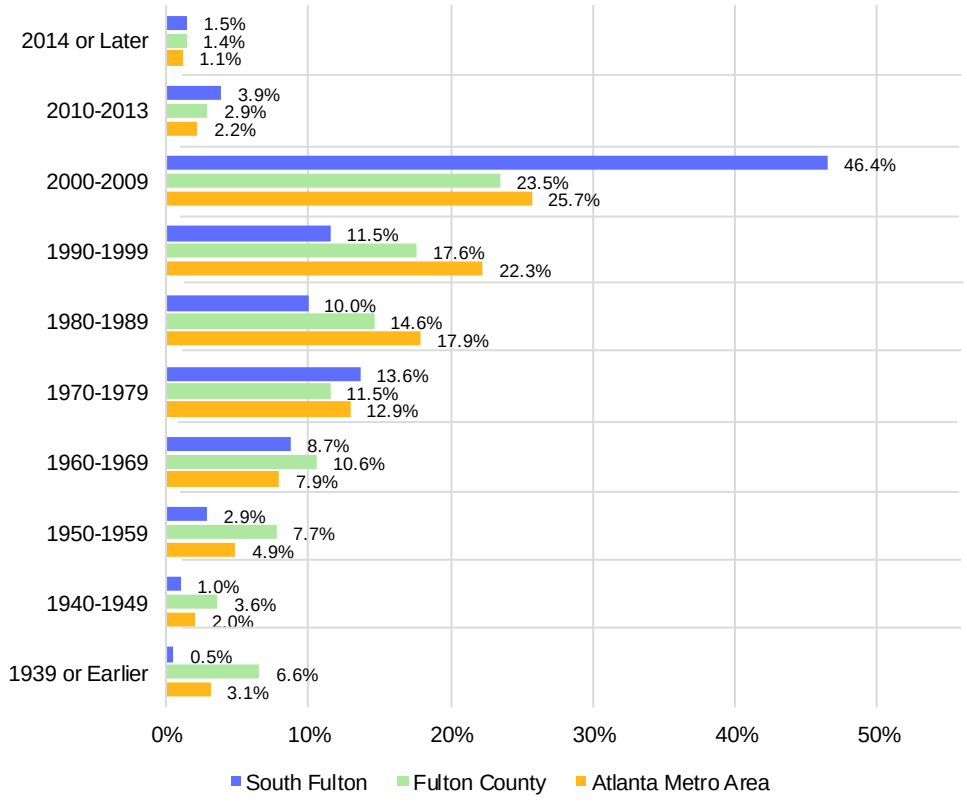
Notes:
(a) Includes boats, RVs, vans, or any other non-traditional residences.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Age of Housing Stock

Figure 25 illustrates the breakdown of housing units by year built. In South Fulton, more than 50 percent of housing units were constructed in 2000 or later. By contrast, only 28 percent of units in Fulton County and 29 percent of housing units in the Atlanta Metro Area were constructed in 2000 or later. It is notable that all three geographies experienced a relatively large amount of new residential development between 2000 and 2009, particularly the city of South Fulton.

Figure 25: Housing Units by Year Built, 2013 – 2017 Five-Year Data



Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Multifamily Rental Market

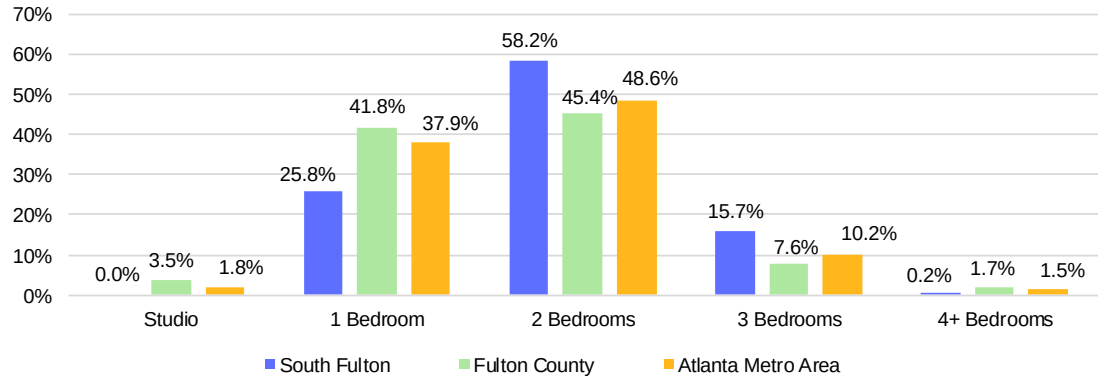
The following section reviews the characteristics and trends of the multifamily rental markets in each geography. Exhibit A-20 in the Appendix contains additional detailed information. According to CoStar, there are 3,986 market-rate multifamily units in South Fulton.

Multifamily Rental Units by Bedroom Count

Figure 26 shows the percent distribution of market-rate multifamily housing units in all three geographies by number of bedrooms. South Fulton has large proportions of two- and three-bedroom units relative to the county and metro area, which have larger shares of one-bedroom

apartments. In South Fulton, nearly three quarters of market-rate multifamily rental units have two or more bedrooms, as compared to 54.7 percent of units in Fulton County and 60.3 percent of units in the Atlanta metro area. This is likely driven by the relatively large share of family households in South Fulton.

Figure 26: Distribution of Units by Bedroom Count, Q1 2019



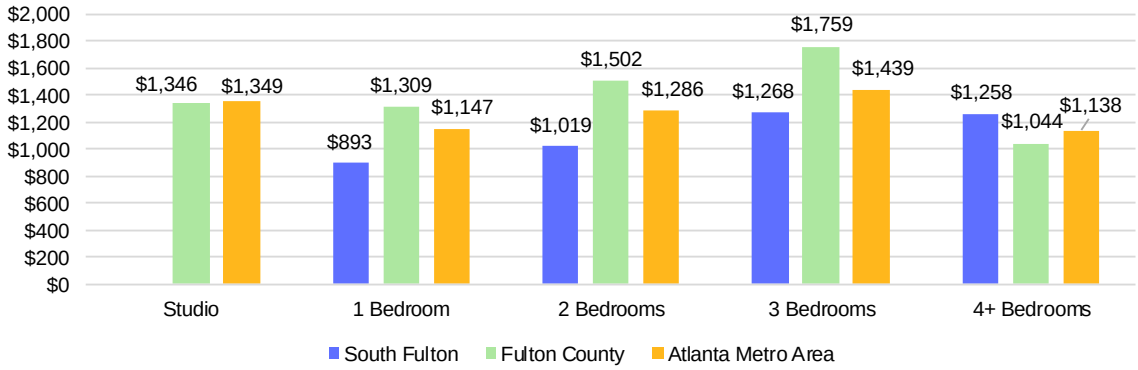
Note: Market-rate units only.

Sources: CoStar; BAE, 2019.

Multifamily Rents

Figure 27 depicts average monthly rents for market-rate multifamily units by bedroom size. Overall, rents are lower in South Fulton as compared to the county and metro area. While the average rent of a four-bedroom apartment in South Fulton is higher than that of the county and state, there are only eight four-bedroom units in South Fulton.

Figure 27: Average Multifamily Rents by Number of Bedrooms, Q1 2019

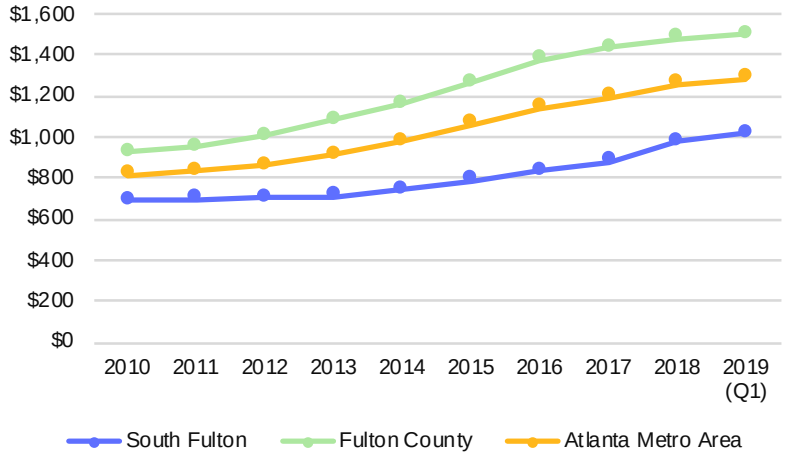


Note: Rents are effective rents; market-rate units only.

Sources: CoStar; BAE, 2019.

Figure 28 shows the average rent for a market-rate two-bedroom unit in each geography from 2010 to the first quarter of 2019. While rents have consistently been lower in South Fulton than the surrounding geographies since 2010, the price gap has widened over the 2010 – 2019 time period. As of the first quarter of 2019, the average rent for a two-bedroom unit in South Fulton was $1,019, as compared to $1,502 in Fulton County and $1,286 in the Atlanta metro area.

Figure 28: Average Multifamily Rent, Two-Bedroom Unit, Q1 2019



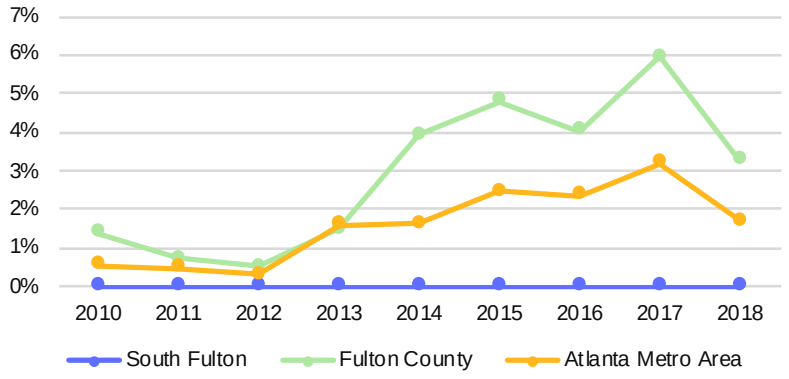
Note: Rents are effective rents; market-rate units only.

Sources: CoStar; BAE, 2019.

Multifamily Rental Inventory Growth

Figure 29 illustrates annual market-rate multifamily unit deliveries as a share of the total multifamily inventory in each geography from 2010 to 2018. In South Fulton, there were no market-rate multifamily unit deliveries during this timeframe. By contrast, Fulton County and the Atlanta Metro Area experienced significant rates of multifamily development every year from 2013 to 2018.

Figure 29: Annual Market-Rate Multifamily Unit Deliveries as a Share of Total Market-Rate Units, 2010 – 2018



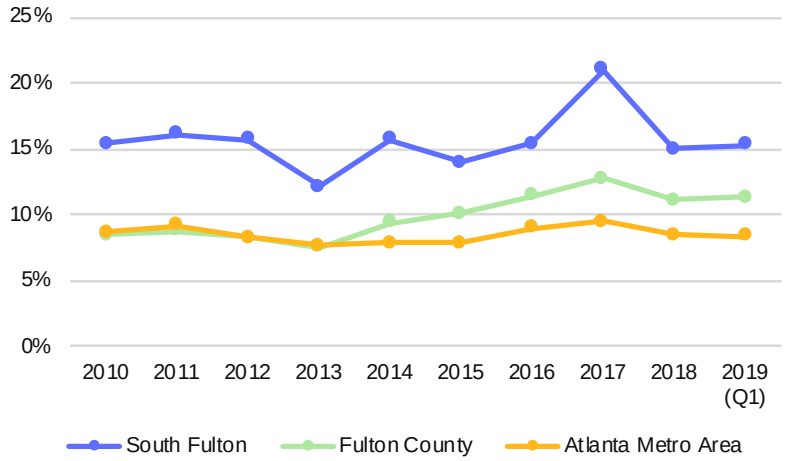
Note: Market-rate units only.

Sources: CoStar; BAE, 2019.

Multifamily Rental Vacancy

Figure 30 illustrates average market-rate multifamily vacancy rates in each geography from 2010 to the first quarter of 2019. Multifamily vacancy rates in South Fulton have consistently been higher than in the county and metro area. During the 2010 – Q1 2019 time period, the average annual multifamily vacancy rate in South Fulton has ranged from a low of 12.2 percent (in 2013) to a high of 21.0 percent (in 2017). As of the first quarter of 2019, the average multifamily rental vacancy rate in South Fulton was 15.3 percent, as compared to 11.3 percent in Fulton County and 8.4 percent in the Atlanta metro area.

Figure 30: Average Multifamily Rental Vacancy Rates, 2010 – Q1 2019



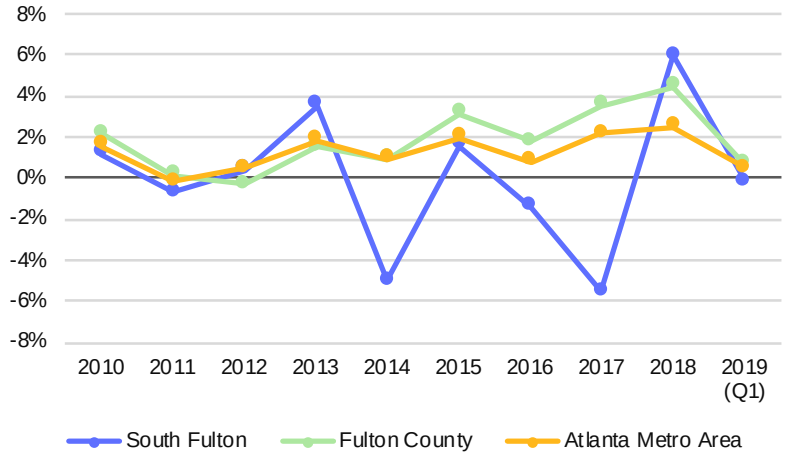
Note: Market-rate units only.

Sources: CoStar; BAE, 2019.

Multifamily Rental Absorption

As shown in Figure 31, multifamily absorption rates in South Fulton have been erratic in recent years, alternating between positive and negative net absorption. In Fulton County and the Atlanta metro area, annual net absorption has been consistently positive since 2013. In the first quarter of 2019, the net absorption rate in South Fulton was negative 0.2 percent, while it was 0.7 percent in Fulton County and 0.5 percent in the metro area.

Figure 31: Net Absorption Rates, 2010 – Q1 2019



Note: Market-rate units only.

Sources: CoStar; BAE, 2019.

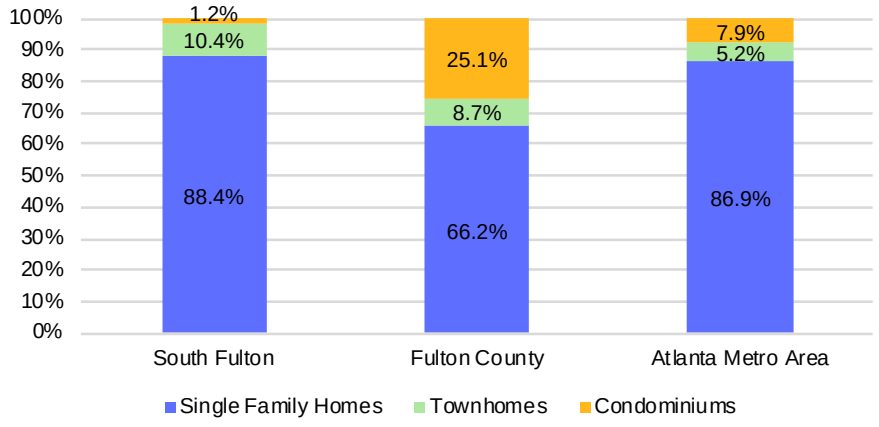
For-Sale Housing

The following section discusses the for-sale housing markets in the City of South Fulton's Fulton County, and the Atlanta metro area. This portion of the analyses relies on home sale records from April 2018 to March 2019 and reveals findings related to the for-sale housing stock by unit type, unit size, sale prices, and foreclosure rates. Additional home sale data can be found in the Appendix in Exhibit A-21 through Exhibit A-24.

Home Sales by Type

Figure 32 illustrates the percent distribution of homes sold in each geography from April 2018 to March 2019 by type. In South Fulton, more than 88 percent of homes sold during this period were single family homes, while 10.4 percent were townhomes and 1.2 percent were condominiums. This breakdown is comparable to that of the Atlanta metro area, although in the metro area, a slightly larger proportion of homes sold during this period were condominiums (7.9 percent). In Fulton County, a significantly smaller proportion of units sold during this period were single family homes than in South Fulton and the Atlanta metro area.

Figure 32: Homes Sold by Type, April 2018 – March 2019



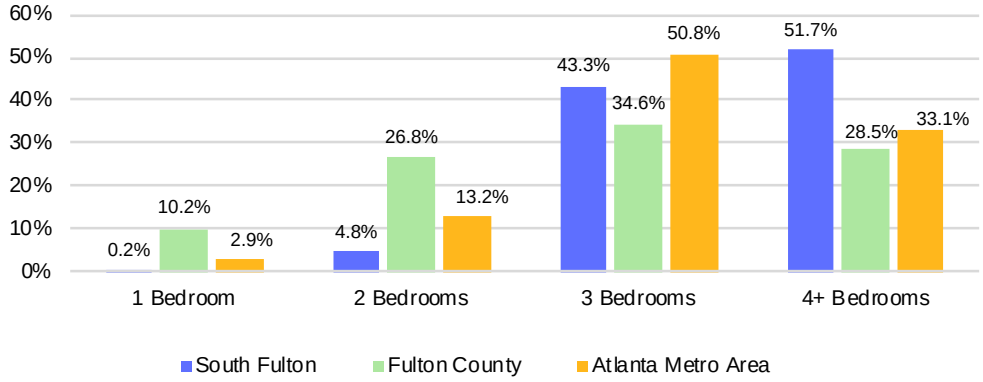
Note: Only Includes sales for which sale price data are available

Sources: ListSource/CoreLogic; DQNews/Corelogic; BAE, 2019.

Home Sales by Number of Bedrooms

As shown in Figure 33, over half of single family homes sold in South Fulton during the April 2018 – March 2019 period had four or more bedrooms, as compared to only 28.5 percent of homes sold in Fulton County and 33.1 percent of homes sold in the Atlanta metro area during this timeframe. Meanwhile, only 5.0 percent of homes sold in South Fulton had two or fewer bedrooms, as compared to 37.0 percent of homes sold in South Fulton and 16.1 percent of homes sold in Atlanta metro area during this period.

Figure 33: Homes Sold by Number of Bedrooms, April 2018 – March 2019



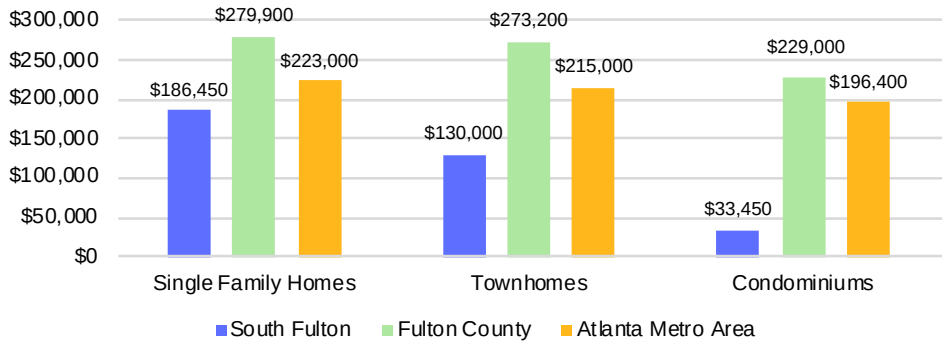
Notes: Only Includes sales for which data regarding sale price and number of bedrooms are available.

Sources: ListSource/CoreLogic; DQNews/Corelogic; BAE, 2019.

Home Sale Prices

Figure 34 shows the median home sale price by unit type in each geography from April 2018 to March 2019. The median sale price of a single family home in South Fulton was $186,450 during this period, as compared to $279,000 in Fulton County and $223,000 in the Atlanta metro area. The price gap between homes in South Fulton and homes in the surrounding geographies is more pronounced for townhomes and condominiums. In South Fulton, the median sale price of a townhome during this period was $130,000, as compared to $273,200 in Fulton County and $215,000 in the Metro Atlanta Area. The median sale price of a condominium in South Fulton during was only $33,450; however, it should be noted that only 12 condominiums sold in South Fulton during this time period, and nine of those units were located in the Camelot Condominium residential community located off of Old National Highway east of I-85.

Figure 34: Median Home Sale Price by Unit Type, April 2018 – March 2019

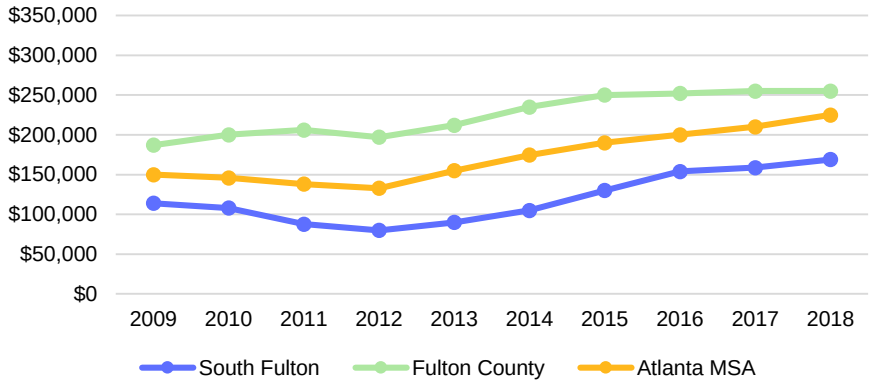


Note:
Only Includes sales for which sale price and square footage data are available.

Sources: ListSource/CoreLogic; DQNews/Corelogic; BAE, 2019.

Figure 35 illustrates the annual median home sale price in each geography from 2009 to 2018. All three areas began experiencing consistent post-recession median home price increases in 2013, which have continued each year since then. In South Fulton, annual increases in the median home sale price were relatively steep from 2013 to 2016 (more than 10 percent annually each year); in 2017 and 2018 increases were more modest (3.1 percent and 6.4 percent, respectively).

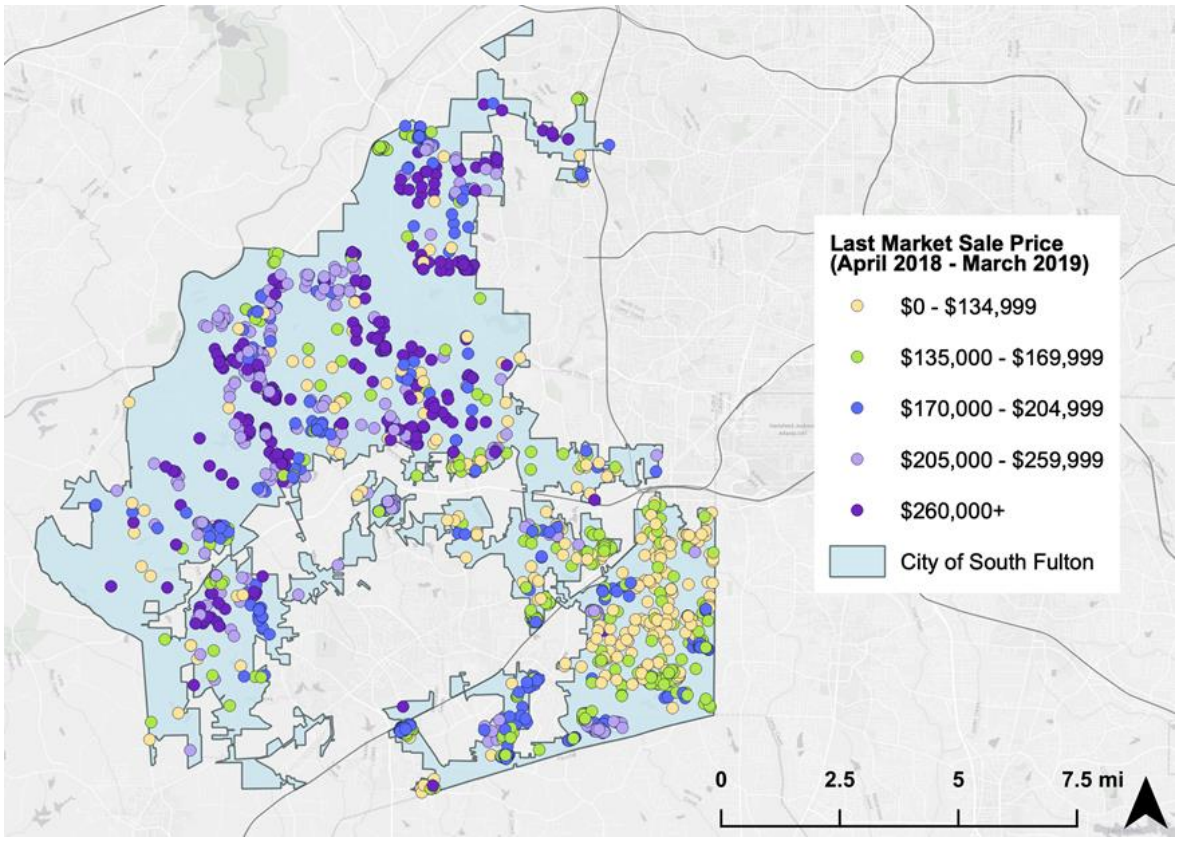
Figure 35: Median Home Sale Price, 2009 – 2018



Note: Includes all unit types -- single family homes, townhomes, and condominiums.
Sources: DQNews/CoreLogic; BAE, 2019.

Figure 36 Illustrates home sales in South Fulton from April 2018 to March 2019 by sale price and location. More expensive homes (those that sold for between $205,000 and $259,999 and those that sold for more than $260,000) are generally located in the northwest portion of the city, west of I-85. Meanwhile, homes that sold for less than $135,000 and homes that sold for between $135,000 and $169,000 are generally located in the southeast portion of the city, east of I-85.

Figure 36: Home Sales in South Fulton by Sale Price and Location, April 2018 – March 2019



Sources: City of South Fulton; Arc GIS Pro; CoreLogic via ListSource; BAE, 2019.

Home Foreclosure Rates

Table 6 shows April 2019 home foreclosure rates in each geography in according to RealtyTrac, a real estate information company that provides monthly foreclosure data reports. In South Fulton, one in every 1,427 homes was in a state of foreclosure (0.07 percent of all homes in the city), as compared to one in every 2,890 homes in Fulton County (0.03 percent of all homes in the county) and one in every 2,842 homes in the Atlanta metro area (0.04 percent of all homes in the metro area).

Table 6: Home Foreclosure Rates, April 2019

Geography	Foreclosure Rate (a)		
South Fulton (b)	1 in every	1,427	housing units
Fulton County	1 in every	2,890	housing units
Atlanta Metro Area	1 in every	2,842	housing units

Notes:
(a) Rates were calculated as weighted averages based on home foreclosure rates in each County and/or ZIP code and number of households in each county and/or ZIP code
(b) Foreclosure rates are not available at the Census block group level; ZIP codes that lie at least 5% within South Fulton were used instead.
Sources: RealtyTrac; Esri; BAE, 2019.

Retail

Table 7 provides an overview of the retail markets in South Fulton, Fulton County, and the Atlanta metro area. According to CoStar, there are approximately 2.6 million square feet of retail space in South Fulton. The following section reviews trends related to retail rents, new retail development, vacancy, and absorption.

Table 7: Retail Market Overview

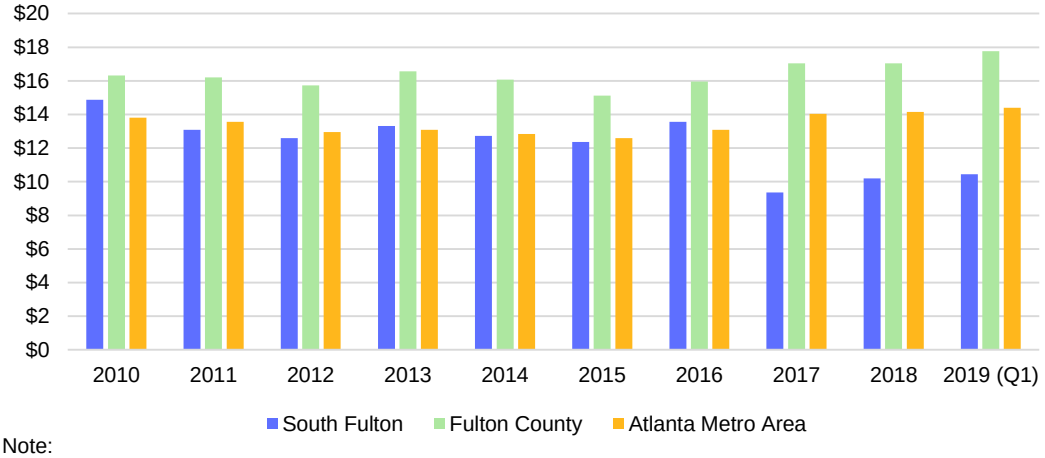
Summary, Q1 2019	South Fulton	Fulton County	Atlanta Metro Area
Inventory (SF)	2,604,767	74,066,942	356,647,387
Occupied Stock (SF)	2,483,488	70,884,094	339,488,485
Vacant Stock (SF)	121,279	3,182,848	17,158,902
Vacancy Rate	4.7%	4.3%	4.8%
Under Construction (SF)	0	506,775	1,600,288
Annual Asking Rents, PSF			
Avg Asking Rent, NNN Direct, Q1 2018	$10.56	$17.52	$14.40
Avg Asking Rent, NNN Direct, Q1 2019	$10.44	$17.76	$14.40
% Change	-1.1%	1.4%	0.0%

Sources: CoStar; BAE, 2019.

Retail Rents

Figure 37 illustrates the average annual triple net retail rent per square foot in each geography from 2010 through the first quarter of 2019. From 2010 to 2016, retail rents in South Fulton were relatively stable; however, between 2016 and 2017, the average annual retail rent declined by 31 percent, falling from $13.56 to $9.36. In the first quarter of 2019, the average annual retail rent per square foot was $10.44 in South Fulton, $17.76 in Fulton County, and $14.40 in the Atlanta metro area.

Figure 37: Average Annual Retail Rent PSF, 2010 – Q1 2019

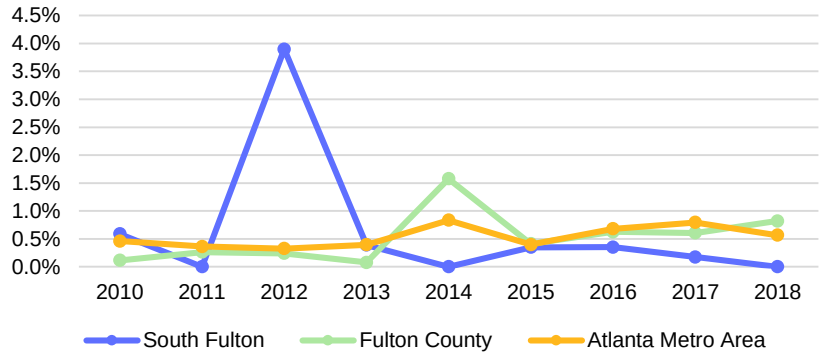


Note:
Rents reflect direct triple-net leases. Rents are for Q4 unless indicated otherwise.
Sources: CoStar; BAE, 2019.

Development of New Retail Space

As shown in Figure 38, in 2012, the city of South Fulton experienced a significant amount of retail development in (100,853 square feet, the equivalency of 3.9 percent of the city's total retail inventory that year). Relatively modest amounts of retail development (between 4,000 and 15,000 square feet) also occurred in 2010, 2015, 2016, and 2017. Fulton County and the Atlanta metro area experienced modest amounts of retail development (between 0.1 percent to 1.6 percent of total inventory annually) on a relatively regular basis over the 2010 – 2018 period.

Figure 38: Annual Retail Deliveries (SF) as a Share of Total Retail Inventory (SF), 2010 – 2018

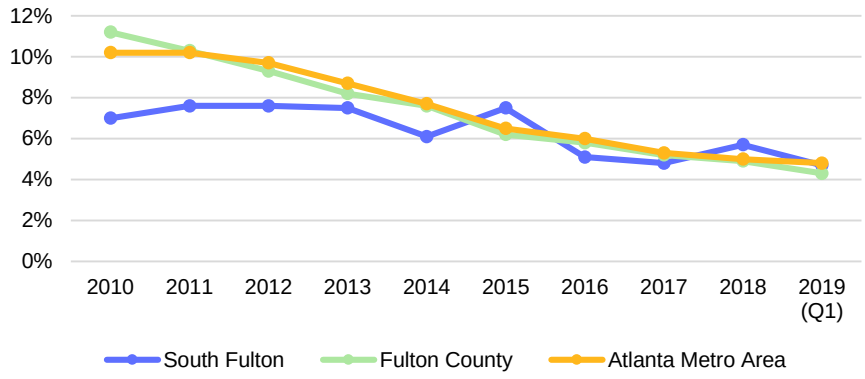


Note:
Inventory and deliveries measured in square feet.
Sources: CoStar; BAE, 2019.

Retail Vacancy Rates

Figure 39 shows the average retail vacancy rates in each geography from 2010 through the first quarter of 2019. From 2010 to 2014, retail vacancy rates in South Fulton were lower than those in the surrounding geographies. However, since 2015, retail vacancy rates have been similar in all three geographies. In the first quarter of 2019, the average retail vacancy rate in South Fulton was 4.7 percent, while it was 4.3 percent in Fulton County and 4.8 percent in the Atlanta metro area.

Figure 39: Average Retail Vacancy Rate, 2010 – Q1 2019

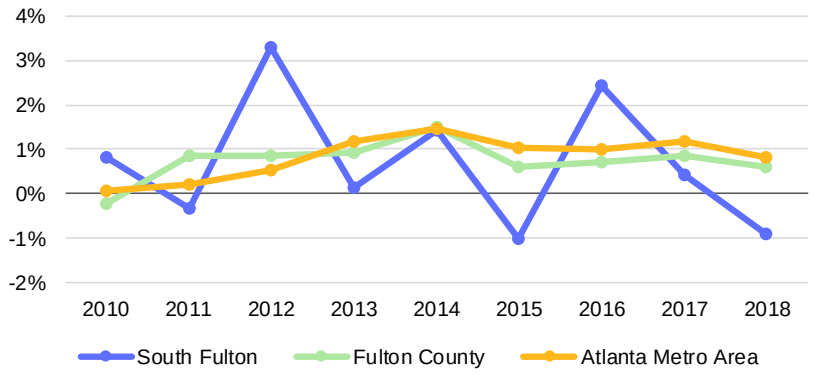


Note: Vacancy rates are for Q4 unless indicated otherwise.
Sources: CoStar; BAE, 2019.

Retail Absorption Rates

As shown in Figure 40, from 2010 to 2018, annual retail absorption rates in South Fulton were mostly positive. However, in 2013, 2015, and 2018, retail net absorption fell slightly below zero. By contrast, annual net absorption rates in the surrounding geographies were consistently above zero every year from 2011 through 2018. In 2018, the annual net absorption rate was negative 0.9 in South Fulton, as compared to 0.6 percent in Fulton County and 0.8 percent in the Atlanta metro area.

Figure 40: Net Retail Absorption Rates, 2010 – 2018



Sources: CoStar; BAE, 2019.

Office

Table 8 provides an overview of the office markets in South Fulton, Fulton County, and the Atlanta metro area. According to CoStar, there are 750,871 square feet of office space in South Fulton. The following section reviews trends related to retail rents, new office development, vacancy, and absorption.

Table 8: Office Market Overview

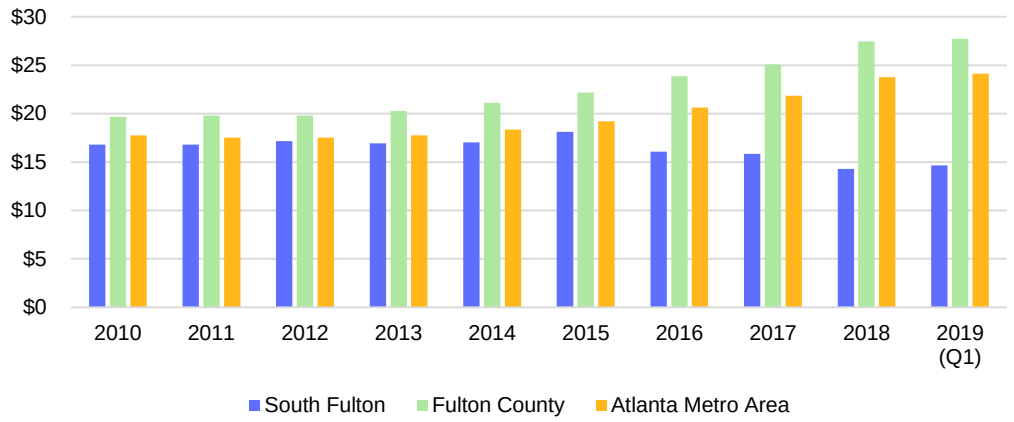
Summary, Q1 2019	South Fulton	Fulton County	Atlanta Metro Area
Inventory (SF)	750,871	155,727,223	312,103,107
Occupied Stock (SF)	709,523	138,087,898	276,655,120
Vacant Stock (SF)	41,348	17,639,325	35,447,987
Vacancy Rate	5.5%	11.3%	11.4%
Under Construction (SF)	0	2,961,480	5,136,738
Annual Asking Rents, PSF			
Avg Asking Rent, NNN Direct, Q1 2018	$14.52	$25.92	$22.56
Avg Asking Rent, NNN Direct, Q1 2019	$14.64	$27.72	$24.12
% Change	0.8%	6.9%	6.9%

Sources: CoStar; BAE, 2019.

Office Rents

Figure 41 illustrates the average annual office rent per square foot in South Fulton, Fulton County, and the Atlanta metro area from 2010 through the first quarter of 2019. From 2010 to 2014, office rents in South Fulton were relatively stable. From 2014 to 2015, the average office rent increased by 6.3 percent (from $17.04 to $18.12); over the following three years, the average office rent decreased by 21.2 percent (from $16.08 to $14.28). By contrast, average office rents in the county and metro area have consistently increased since 2011. As of Q1 2019, the average annual office rent in South Fulton was $14.64, as compared to $27.72 in Fulton County and $24.12 in the Atlanta Metro Area.

Figure 41: Average Annual Office Rent PSF, 2010 – Q1 2019

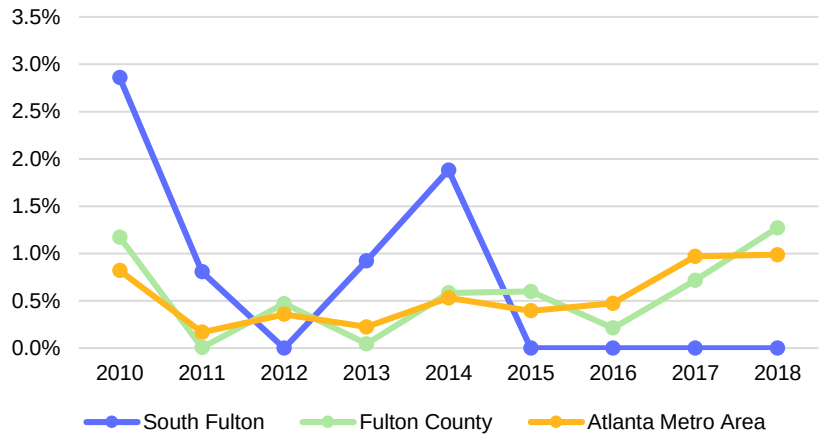


Notes:
Rents reflect base rent on direct leases. Rents are for Q4 unless indicated otherwise.
Sources: CoStar; BAE, 2019.

Development of New Office Space

Figure 42 illustrates annual office deliveries as a share of total office inventory in each geography from 2010 to 2018. South Fulton experienced significant spikes in office development in 2010 (20,700 square feet, representing nearly 3.0 percent of total office inventory that year), as well as 2014 (14,132 square feet, representing nearly 2.0 percent of total office inventory that year). South Fulton also experienced modest amounts of new office development (between 0.8 and 0.9 percent of total office inventory) in 2011 and 2013. From 2015 to 2018, South Fulton did not experience any new office development. By contrast, during this same period, Fulton County and the Atlanta Metro Area consistently added office square footage equivalent to between 0.2 and 1.0 percent of total office inventory.

Figure 42: Annual Office Deliveries (SF) as a Share of Total Office Inventory (SF), 2010 – 2018

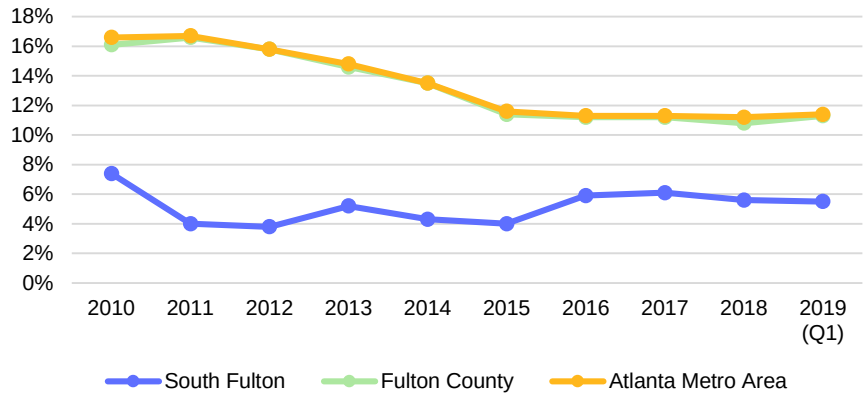


Note:
Inventory and deliveries measured in square feet.
Sources: CoStar; BAE, 2019.

Office Vacancy Rates

As shown in Figure 43, office vacancy rates in South Fulton are significantly lower than in the surrounding geographies. From 2010 through the first quarter of 2019, the average office vacancy rate in South Fulton ranged from 3.8 percent to 7.4 percent. By contrast, the average office vacancy rates in the county and metro area – which closely mirrored each other each year from 2010 through Q1 2019 – have ranged from approximately 11 percent to approximately 17 percent. As of Q1 2019, the average office vacancy rate was 5.5 percent in South Fulton, as compared to 11.3 percent in Fulton County and 11.4 percent in the Atlanta Metro Area.

Figure 43: Average Office Vacancy Rate, 2010 – Q1 2019

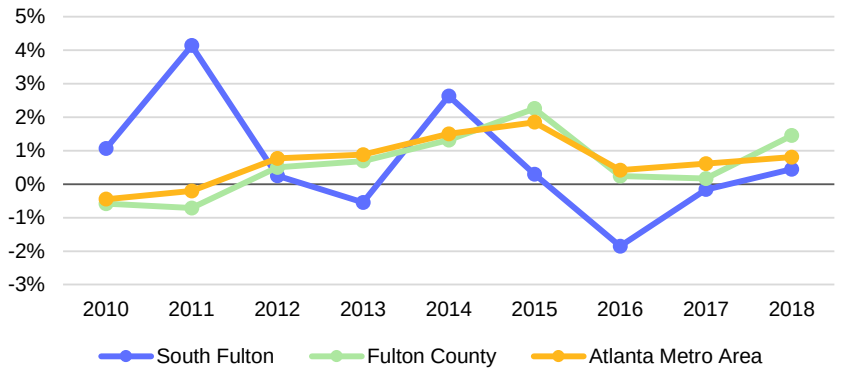


Note: Vacancy rates are for Q4 unless indicated otherwise.
Sources: CoStar; BAE, 2019.

Office Absorption Rates

As shown in Figure 44, from 2010 to 2018, annual office net absorption rates in South Fulton were mostly positive. However, in 2013, 2016, and 2017, office net absorption fell below zero. By contrast, annual net absorption rates in the surrounding geographies were consistently above zero every year from 2012 through 2018. In 2018, the annual net absorption rate was 0.4 in South Fulton, as compared to 1.5 percent in Fulton County and 0.8 percent in the Atlanta metro area.

Figure 44: Net Office Absorption Rates, 2010 – 2018



Sources: CoStar; BAE, 2019.

Industrial

Table 9 provides an overview of the industrial and flex markets in South Fulton, Fulton County, and the Atlanta metro area. According to CoStar, there are approximately 8.4 million square feet of office space in South Fulton. The following section reviews trends related to industrial/flex rents, new industrial/flex development, vacancy, and absorption.

Table 9: Industrial/Flex Market Overview

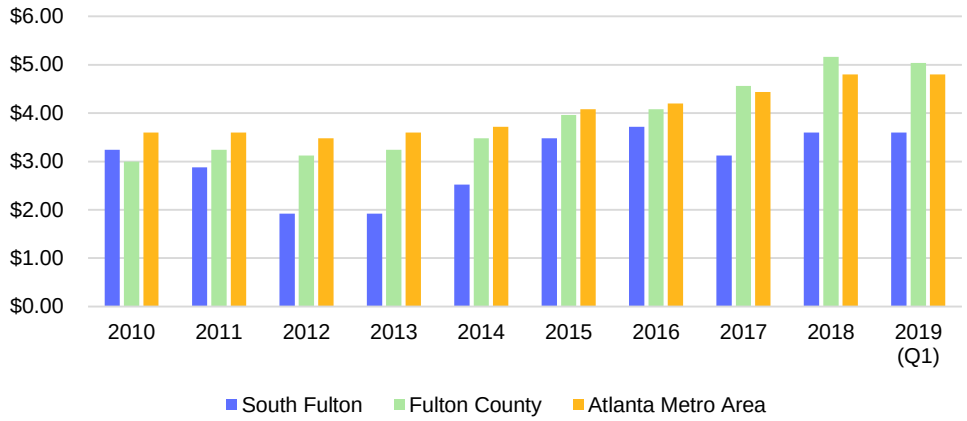
Summary, Q1 2019	South Fulton	Fulton County	Atlanta Metro Area
Inventory (SF)	8,368,568	164,457,321	710,168,248
Occupied Stock (SF)	7,530,461	155,430,398	671,232,178
Vacant Stock (SF)	838,107	9,026,923	38,936,070
Vacancy Rate	10.0%	5.5%	5.5%
Under Construction (SF)	0	3,196,308	15,153,551
Annual Asking Rents, PSF			
Avg Asking Rent, NNN Direct, Q1 2018	$3.00	$4.80	$4.56
Avg Asking Rent, NNN Direct, Q1 2019	$3.60	$5.04	$4.80
% Change	20.0%	5.0%	5.3%

Sources: CoStar; BAE, 2019.

Industrial/Flex Rents

Figure 45 illustrates the average annual rents for industrial/flex space in each geography from 2010 through the first quarter of 2019. Industrial/flex rents in South Fulton fluctuated during this period, first decreasing by 40.7 percent from 2010 to 2012, and then increasing by 93.8 percent from 2013 to 2016. As of the first quarter of 2019, the average annual industrial/flex rent in South Fulton was $3.60, as compared to $5.04 in Fulton County and $4.80 in the Atlanta metro area.

Figure 45: Average Annual Industrial/Flex Rent PSF, 2010 – Q1 2019

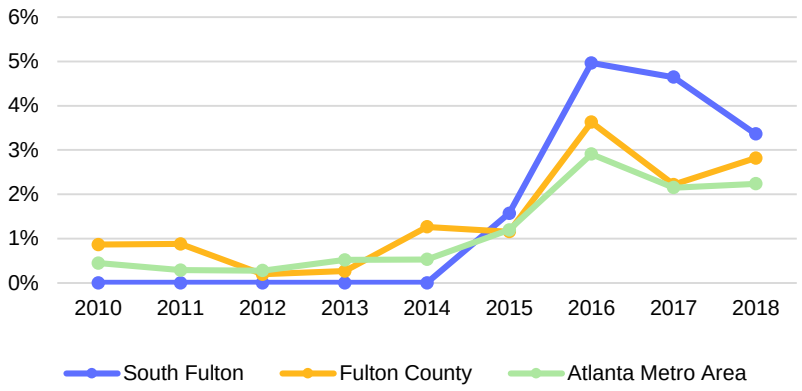


Note:
Rents reflect direct triple-net leases.
Rents are for Q4 of each year unless inducated otherwise.
Sources: CoStar; BAE, 2019.

Development of New Industrial/Flex Space

Figure 46 shows the annual amount of industrial/flex development as a share of total inventory in each geography from 2010 to 2018. All three geographies experienced relatively significant amounts of industrial/flex development from 2015 to 2018, particularly South Fulton. From 2015 through the first quarter of 2019, South Fulton added approximately 1.4 million square feet of industrial/flex space. This includes the Graham Logistics Center, the Airport-West Distribution Center, Lakeview Business Park, and the Flat Shoals Distribution Center.

Figure 46: Annual Industrial/Flex Deliveries (SF) as a Share of Total Industrial/Flex Inventory (SF), 2010 – 2018

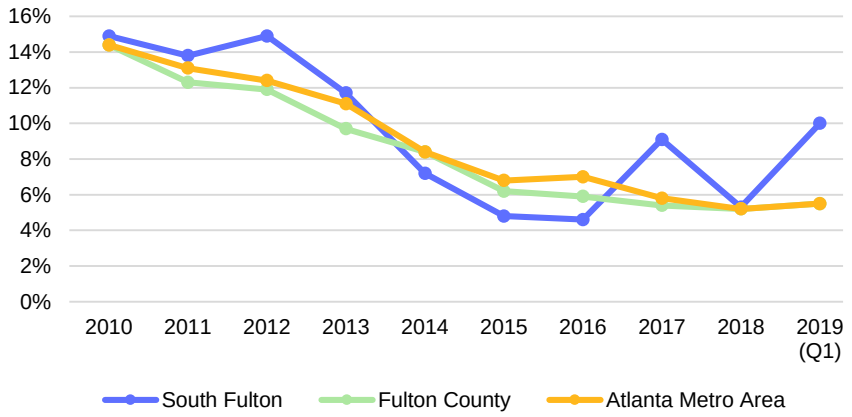


Note: Inventory and deliveries measured in square feet.
Sources: CoStar; BAE, 2019.

Industrial/Flex Vacancy Rates

Figure 47 illustrates the average vacancy rates for industrial and flex space in South Fulton, the county, and the metro area from 2010 through the first quarter of 2019. From 2010 to 2016, vacancy rates followed a relatively consistent downward trend in all three geographies. South Fulton experienced a spike in vacancy in 2017, and again in 2019, likely due to the sharp increase in available industrial/flex space in recent years. In the first quarter of 2019, South Fulton's industrial/flex vacancy rate was 10.0 percent, as compared to 5.5 percent in both the county and the metro area.

Figure 47: Industrial/Flex Vacancy Rate, 2010 – Q1 2019

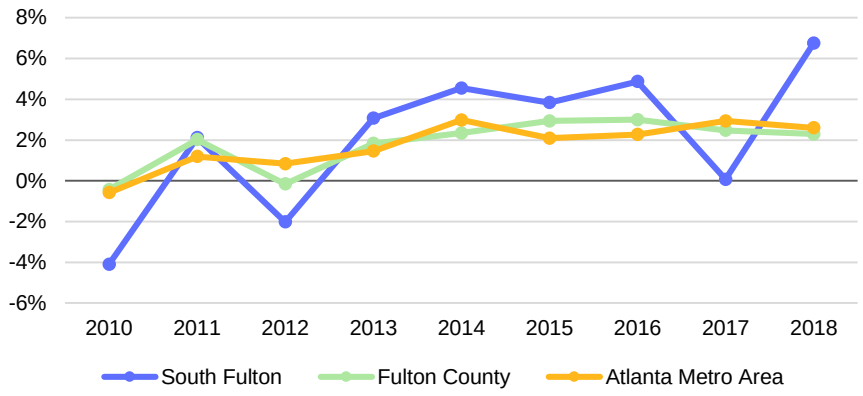


Note:
Vacancy rates are for Q4 of each year unless inducated otherwise.
Sources: CoStar; BAE, 2019.

Industrial/Flex Absorption Rates

Figure 48 illustrates the annual net absorption rates for industrial/flex space from 2010 to 2018. From 2013 to 2016, net absorption rates were higher in South Fulton than in the surrounding geographies. In 2018, South Fulton experienced a significant boost in absorption, reaching an annual net absorption rate of 6.8 percent.

Figure 48: Net Industrial/Flex Absorption Rates, 2010 – 2018



Sources: CoStar; BAE, 2019.

Education

This section provides an overview of South Fulton's primary and secondary educational institutions, with a particular focus on career and technical education at the high school level. The city is served by Fulton County Schools; its three public high schools served 6,457 students in 2018. Enrollment at South Fulton's five public middle schools in 2018 was 4,645, while the city's 13 public elementary schools served 8,477 students. In addition, the Arlington Christian School, which is religiously affiliated and serves Pre-K through 12th grade, is also in the city. See Table 10 for a full list of schools.

Table 10: Public and Private Schools in South Fulton, 2019

Public and Charter Schools	Enrollment (2018)	College and Career Ready Performance Index Single Score (a)	Four-Year HS Graduation Rate
High Schools	**6,457**		
Westlake High School	2,164	84.5	92.30%
Langston Hughes High School	1,898	68.2	88.80%
Creekside High School	1,720	66.2	86.50%
County Median	*1,801*	*72.5*	*89.90%*
Middle Schools	**4,645**		
Sandtown Middle School	861	81	-
Camp Creek Middle School	595	78.7	-
Bear Creek Middle School	1,195	65.7	-
Renaissance Middle School	1,195	62.7	-
McNair Middle School	799	70.5	-
County Median	*861*	76.7	-
Elementary Schools	**8,477**		
Wolf Creek Elementary School	680	79.5	-
Seaborn Lee Elementary School	440	70.8	-
Stonewall Tell Elementary School	683	75.4	-
A. Philip Randolph Elementary Scho	526	66	-
Oakley Elementary School	788	74	-
Heritage Elementary School	599	61.8	-
Evoline C. West Elementary School	759	78	-
Renaissance Elementary School	639	78.7	-
Cliftondale Elementary School	659	81.2	-
Mary M. Bethune Elementary School	663	53.2	-
S. L. Lewis Elementary School	600	64.1	-
Love T. Nolan Elementary School	708	62.4	
Feldwood Elementary School	733	69	-
County Median	*666*	*70.2*	-

Private Schools	Grade Levels	Description
Arlington Christian School	Pre K-12	Religiously affiliated.

Notes:
(a) CCRPI scores take into account factors including state test scores, student academic growth on these tests, and graduation rates.

Sources: GA Governor's Office of Student Achievement; GA Department of Education; BAE 2019.

Westlake High School earned the highest Career and College Readiness Index (CCRI) Single Score in South Fulton in 2018; this score was equivalent to the median score in Fulton County as a whole. Overall, South Fulton schools performed lower on career- and college-readiness than other schools in the county. However, the graduation rate at Westlake High School and was above the median for Fulton County at 92.3 percent.

For middle and elementary schools, the CCRI Single Score provides an overall gauge of student performance and improvement on state standardized tests. Among South Fulton's elementary schools, seven out of 13 obtained scores at or above the county median of 70.2 in 2019. Two out of the five middle schools in the city performed above the county median of 76.7.

High School Career and Technical Education

Fulton County Career, Technical, and Agricultural Education (CTAE). Students in Fulton County public schools have the option of enrolling in CTAE coursework during high school. Students select one of 16 Career Clusters, each of which contains up to three specific "pathways" tailored to a particular career. After completing a pathway, students may take a professional certification exam and/or participate in on-the-job training through the Work-Based Learning (WBL) program, discussed below. See Table 11 for a list of clusters and pathways available in public and charter high schools.

Table 11: Career Clusters and Pathways in Fulton County Schools

	Architecture and Construction	**Arts, A/V, Technology, and Communications**		**Agriculture, Food, and Natural Resources**			
	Architectural Drawing and Design	A/V Technology and Film	Graphic Design	Agriscience Systems	Horticulture and Animal Systems	Companion Animal Systems	
Westlake High School	x	x					
Langston Hughes High School			x				
Creekside High School				x	x	x	
	Education and Training	**Hospitality and Tourism**	**Human Services**	**Government and Public Administration**	**Law, Public Safety, Corrections, and Security**	**Business Management and Administration**	
	Early Childhood Care and Education	Sports and Entertainment Marketing	Food and Nutrition	JROTC Army Leadership Education	Law Enforcement Services/Criminal Investigation	Entrepreneurship	
Westlake High School		x		x		x	
Langston Hughes High School		x	x	x		x	
Creekside High School	x	x	x	x	x	x	
	Healthcare Science						
	Emergency Medical Responder	Pharmacy	Exercise Physiology	Sports Medicine	Allied Health and Medicine	Patient Care/ Nursing	
Westlake High School	x	x	x	x	x	x	
Langston Hughes High School							
Creekside High School							
	Information Technology			**Science, Technology, Engineering, and Math**	**Finance**	**Transportation, Distribution, and Logistics**	**Manufacturing**
	Computer Science	Web and Digital Design	Programming	Engineering and Technology	Advanced Accounting	Automobile Maintenance and Light Repair	
Westlake High School		x	x	x			x
Langston Hughes High School		x		x	x	x	x
Creekside High School	x	x					x

Sources: Fulton County Schools; BAE 2019.

Fulton Schools College and Career Academy. In addition to completing pathways at their home schools over the course of three years, students at Westlake, Creekside, and Langston Hughes High Schools may also apply to attend the Fulton Schools College and Career Academy part-time, and, in doing so, complete specialized pathways in one year.

FSCCA offers the following career clusters and pathways:

- Architecture and Construction – Construction/Carpentry pathway
- Arts, A/V, Technology, and Communications – A/V Film and Animation pathway
- Education and Training Services – Teaching as a Profession pathway
- Hospitality and Tourism – Culinary Arts pathway
- Transportation, Distribution, and Logistics – Flight Operations pathway

Work-Based Learning. After completing pathway coursework, students may participate in a Work-Based Learning (WBL) placement. The WBL program is designed to complement in-school instruction with field experience, allowing students to receive credit for working in an environment related to their pathway.

The program includes several types of field placement, including:

- Employability Skills Development – Placement does not directly relate to student's career cluster of choice but focuses on teaching transferrable job skills. May last for up to one school year.

- Cooperative Education (Co-Op) – Structured program connecting ongoing school-based occupational instruction to related, paid workplace experiences in a chosen career specialty.

- Internship – Placement allowing student to apply skills and knowledge developed through pathway courses.

- Youth Apprenticeship: A program providing students with a minimum of 720 hours of on-the-job training and mentorship by a working professional, resulting in the student's attainment of a post-secondary credential in a related occupational field.

Other Opportunities

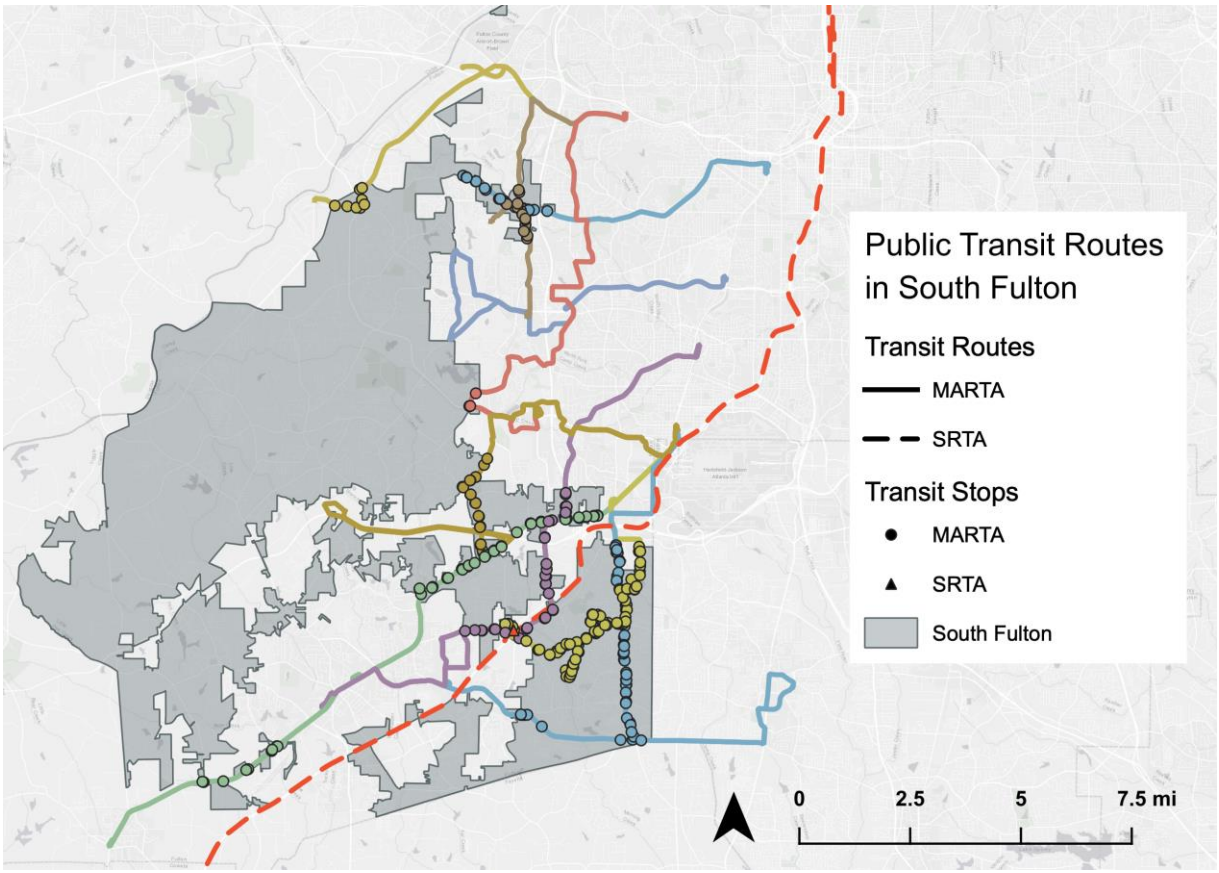
Dual Enrollment. At participating high schools, students may dual-enroll with a local college or technical school, earning both high school and college credit for coursework. By the time of graduation, students are able to complete an associate's degree, a technical diploma, or technical certificate programs. Dual enrollment is available to any Georgia student in grades nine through 12 enrolled in a public, private, or home school program. All schools actively promote the dual enrollment program and have standing partnerships with the local post-secondary schools. For example, Langston Hughes provides transportation to Georgia Military College for students to take courses and the Fulton School College and Career Academy has dual enrollment courses, on site, with Atlanta Technical College.

Triumph Transitions Institute Career Education. Triumph Transitions Institute, which serves middle and high schoolers with learning disabilities, offers work and life skills training. In some cases, students are eligible to take state licensure exams for positions including Child Development Assistant and Certified Home Health Aide. Students may also enroll in a cosmetology apprenticeship.

Transportation

This section examines current public transportation offerings in South Fulton. The city is served primarily by MARTA bus routes. In addition, the State Road and Tollway Authority (SRTA) operates the Xpress bus service connecting downtown Atlanta to surrounding areas; the system's Union City stop lies on the border of South Fulton.

Figure 49: Public Transit in South Fulton



Sources: Fulton County; MARTA; GA State Roadway and Toll Authority; ESRI; BAE 2019.

As shown in Figure 49, public transportation access is richest in the portion of eastern South Fulton that lies south of South Fulton Parkway. MARTA's No. 82, 89, 180 181, and 189 buses make numerous stops in this area, which also contains the SRTA Xpress bus's Union City stop. All but the 180 connect to MARTA's Red and Gold light rail lines.

North of South Fulton Parkway, MARTA's No. 71, 73, and 165 buses make stops in the northernmost part of the city, while the No. 66 bus makes two stops at the city's eastern edge. The No. 183 bus crosses through South Fulton briefly and stops just outside of the city's borders. Of these routes, the 71 provides direct service to central Atlanta and connects with the Red and Gold lines, while the 73, 66, and 165 buses connect to MARTA's Blue light rail line. The No. 82, 89, 180 181, 189 also make a small number of stops north of South Fulton

Parkway in the eastern portion of the city. However, the western-central and southwestern portions of South Fulton contain no public transportation

Workforce Development Programs

This section provides an overview of existing workforce development programs in the city of South Fulton. The city is focused on developing workforce solutions for employers and designing training and recruitment programs to generate a productive talent pipeline and support continued business growth. A key component of the workforce development strategy is the city's Small Business Resource Center & Incubator, which will be a part of the South Fulton Economic Development Resource Center, East Campus that will also include co-working space. The city is also hosting career fairs and coordinates with other local, state, and federal workforce programs.

Small Business Resource Center & Incubator

The city of South Fulton's Small Business Resource Center & Incubator, opening in Spring 2020, will provide small and emerging businesses with resources that cover all aspects of starting and operating a business, including accounting, finance, human resources, management, marketing, tax, and more. The center will also provide access to affordable office space. With a mission to facilitate entrepreneurship, the center will partner with essential service providers for businesses, including CPAs, bookkeepers, attorneys, and marketing.

The network also includes support service partners that help with training and provide one-on-one counseling, certifications, and other supportive services to help enhance the growth and success of small businesses. These diverse and well-established partners include private, public, governmental, and educational institutions, such as the South Fulton Chamber of Commerce, Atlanta Technical College, Aerotropolis Atlanta Alliance, and the Small Business Development Center at Georgia State University.

South Fulton Co-working Space

Co-working space in South Fulton allows entrepreneurs the opportunity to utilize shared resources in order to help them gain access to equipment, space, and services that they could not otherwise afford. As a business services provision model, it cultivates local talent by allowing entrepreneurs to work independently or collaboratively in shared office space.

City of South Fulton Career Expo

Career expos provide an opportunity for South Fulton to connect local companies to the community. Career expos can help connect seasoned executive-level professionals and those beginning their careers. Key partners include Fulton County Schools, Miller Zell, and Georgia Power.

South Fulton Career Center

In addition to local programs, Fulton County provides workforce development opportunities within the city of South Fulton. The Fulton County Housing and Community Development Workforce Development Division operates a Career Center in South Fulton, providing job search and placement services, supportive services, post-employment services and soft skills training. The county also manages a workforce development program for young people that connects young residents to job opportunities and encouraging leadership and independent thinking.

Atlanta Job Corps Center

South Fulton will be home to Atlanta's Job Corps Center, as part of the U.S. Department of Labor's Job Corps program. Job Corps is the largest free residential education and job training program for young adults ages 16–24. The program provides enrollees, who must meet income eligibility requirements, free room and board, clothing, a living allowance, health care, childcare, books and supplies. Job Corps centers also serve as employment centers for the local area, and the Atlanta Job Corps Center's decision to locate in South Fulton will have a beneficial impact on attracting and retaining businesses in the City.

Aerotropolis Atlanta

Aerotropolis Atlanta is a public-private partnership that promotes workforce and economic development of the South side of metro Atlanta. Aerotropolis Atlanta connects industry, community, and education and training stakeholders to develop and implement workforce solutions such as training and recruitment programs that maintain a pipeline of support to local businesses. Key industry sectors that Aerotropolis Atlanta focuses on include aerospace, bio-life sciences, agri-business, logistics and multimedia production.

Notable Planned Developments

Vesta Red Oak Apartments

The $19 million Vesta Red Oak Apartments project will increase the supply of clean, safe, and high-quality workforce housing units in South Fulton. The project consists of redeveloping the currently 100 percent vacant multifamily development that exists on the site with 220 new apartment units in 12 apartment buildings, as well as a clubhouse. The development will be situated on over 19 acres with approximately 221 thousand rentable square feet and will incorporate environmentally responsible design features such as energy efficient appliances, new HVAC units, electrical systems, water heaters, and windows.

The Vesta Red Oaks Apartments will have rents between 60 and 80 percent of area median income (AMI) and will contribute to the economic development of the city and Fulton County through generated sales tax and business license revenues. The developer, Middleburg Communities LLC, has extensive experience developing and operating high-quality workforce housing, with residential rental housing projects in Tennessee, North Carolina, South Carolina,

Kentucky, Georgia, and Texas, as well as 1,400 units in development. Notably, Middelburg is committed to supporting the community and manages a "Local Heroes Program" that provides a rent discount to firefighters, police officers, emergency medical technicians, and public-school teachers.

Halpern's Steak and Seafood Company

The expansion of the Halpern's Steak and Seafood Company's manufacturing and distribution facility represents a $27 million investment in South Fulton. The company will acquire and expand the facility it currently leases and add a new 47,000 square foot building. The project will add 46 new permanent full-time jobs to the existing 260 employees of the company's South Fulton location, as well as create 90 temporary construction jobs. The overall economic impact of the project is estimated to be over $119 million for South Fulton and Fulton County.

Publix and Sandtown Crossing

A new 67,000 square foot Publix is slated to open in Fall 2020 at the 35-acre mixed use development, Sandtown Crossing, located at the corner of Camp Creek Parkway and Campbellton Road. The Publix is planned to be a new prototype for the store. The Publix will also include additional suites on its east and west wings with over 11,000 square feet available for restaurant use. It will also include a drive-through pharmacy.

The Anthem at Riverside

Situated at the intersection of Waycrest Drive and Riverside Drive, The Anthem at Riverside is a senior-oriented rental community that will open by the end of 2020. The project will have 80 units and is financed in part with Low Income Housing Tax Credits (LIHTC). Of the 80 units, 16 will be market-rate. The newly constructed units will have kitchens equipped with a range, a refrigerator, dishwasher, garbage disposal, and microwave. Each unit will also include washer and dryer connections, ceiling fans, central heating and air-conditioning, window blinds, grab bars, and emergency pull cords. Amenities include a community room, an exercise/fitness center, a computer center, an outdoor garden, covered picnic pavilion and a medical office.

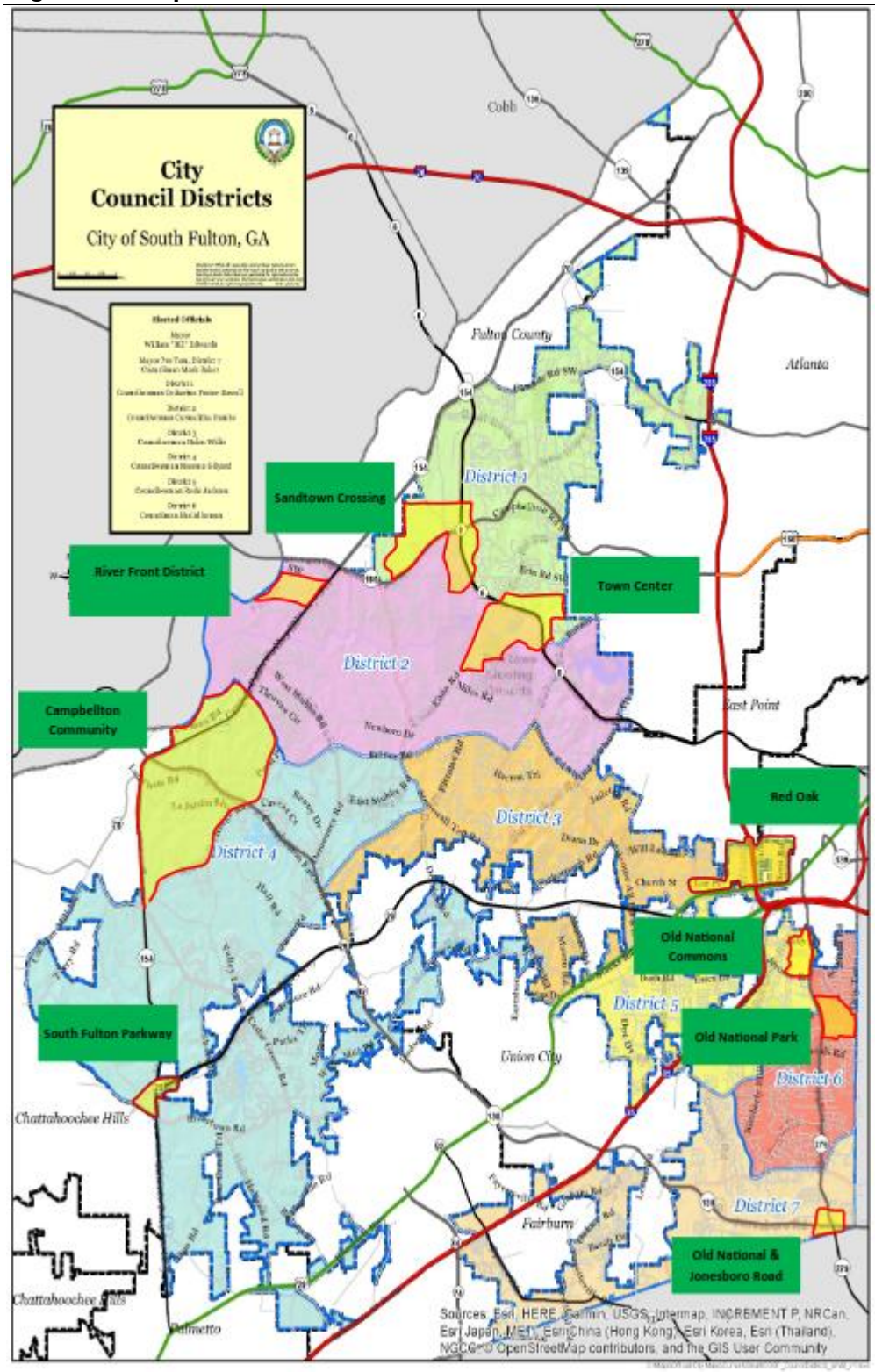
Atlanta Job Corps Center

As described in the previous section, South Fulton will be home to Atlanta's Job Corps Center, as part of the U.S. Department of Labor's Job Corps program. The Center represents a nearly $60 million investment in the city. The South Fulton campus is expected to be one of the top employment centers in the area. With students spending nearly 18 months in the program, the center is an opportunity to attract talent from around the region to create a pipeline for employers in South Fulton and the Atlanta metro broadly.

Economic Opportunity Focus Areas

Since the city of South Fulton's incorporation in 2017, several primary focus areas have been identified for development, redevelopment, and/or revitalization. Each of these areas, shown in Figure 50, has a project or projects planned for the near- to long-term future. Accordingly, each area is included in the recommendations section of this strategic plan. Below is a brief description of both the plans as of early 2020 as well as of each of the areas as they exist presently.

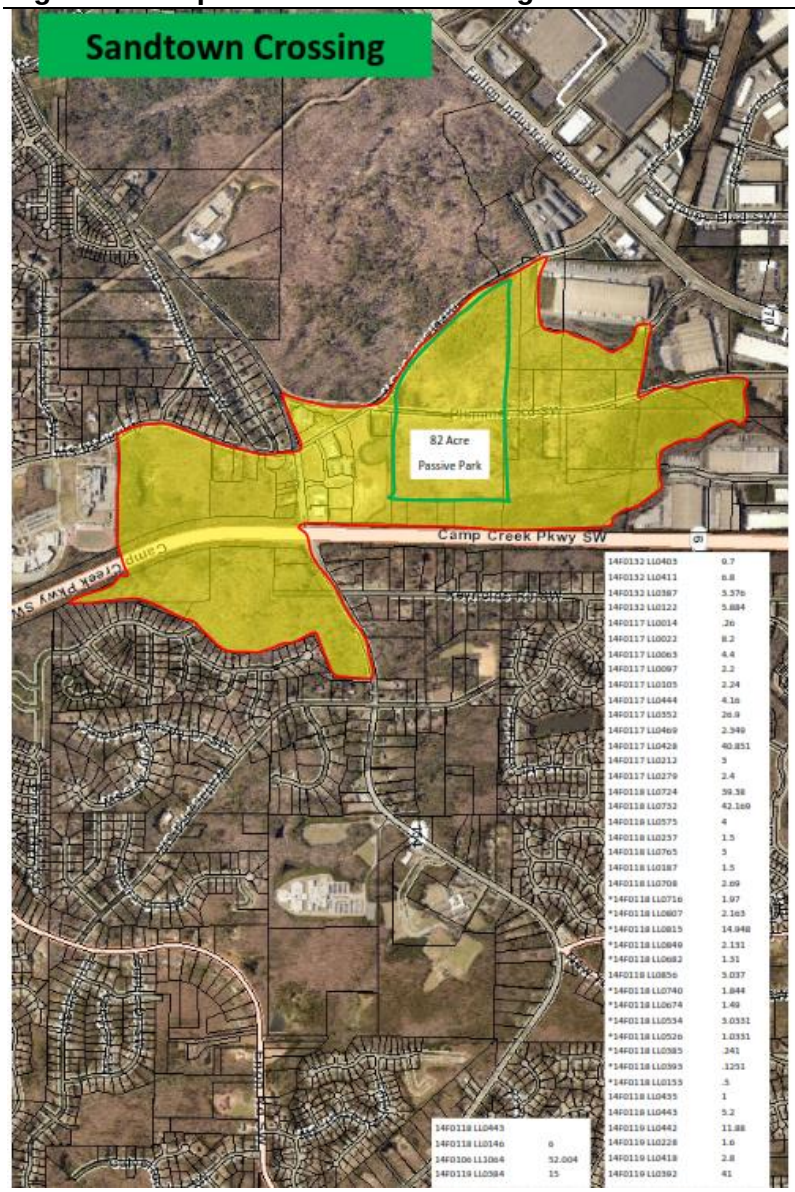
Figure 50: Map of Focus Areas



Sandtown Crossing

Located in City Council District 1 in the northern part of the city of South Fulton, the Sandtown Crossing focus area includes a new 82-acre passive park, and the Sandtown Crossing Shopping Plaza with a 35-acre mixed use development that includes a Publix scheduled to open in November 2020, as well as a new senior citizen development and other amenities. Current uses include retail, office, and daycare. This focus area is located close to the many businesses on Fulton Industrial Boulevard and lies between three major Fulton County schools. See Figure 51 for a map of this area.

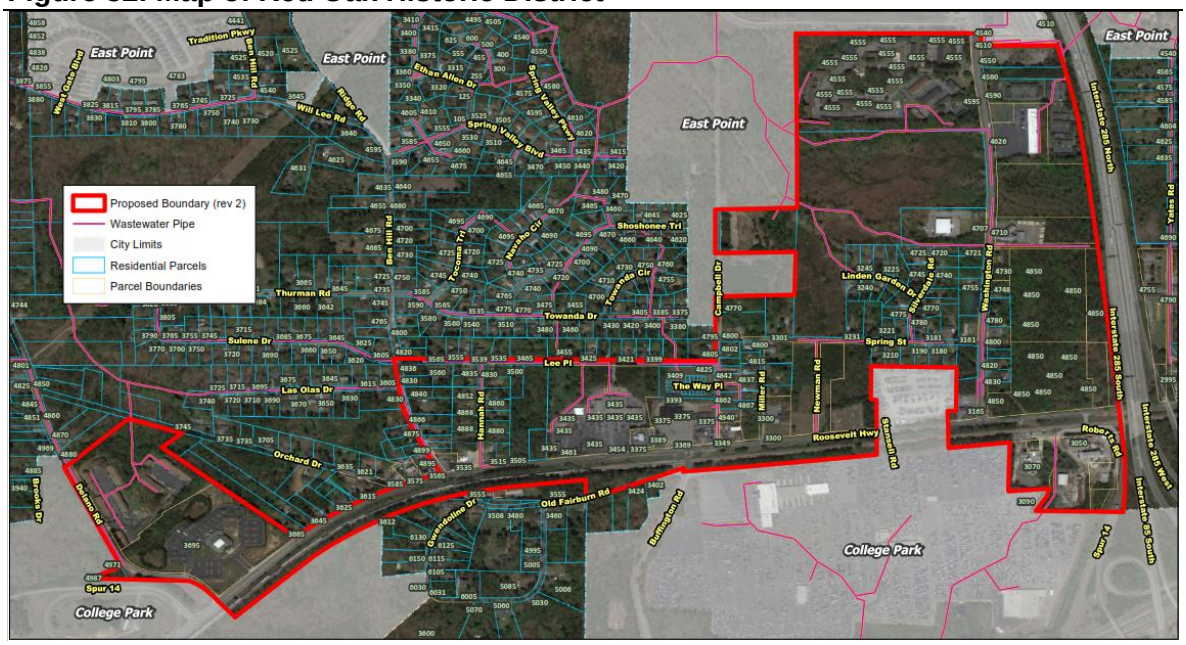
Figure 51: Map of Sandtown Crossing Focus Area



Red Oak Historic District

The Red Oak Historic District is a commercial area located in the City Council District 3 near College Park and East Point. The city recently received notice of inclusion into the Georgia Main Street Program and will be hiring a Main Street Manager to lead the revitalization effort for the Red Oak Historic District. The Georgia Main Street Program follows the National Main Street Approach using "Transformation Strategies" that stress economic vitality, design, promotion, and organization to revitalize historic downtowns and commercial districts. See Figure 52 for a map of this area.

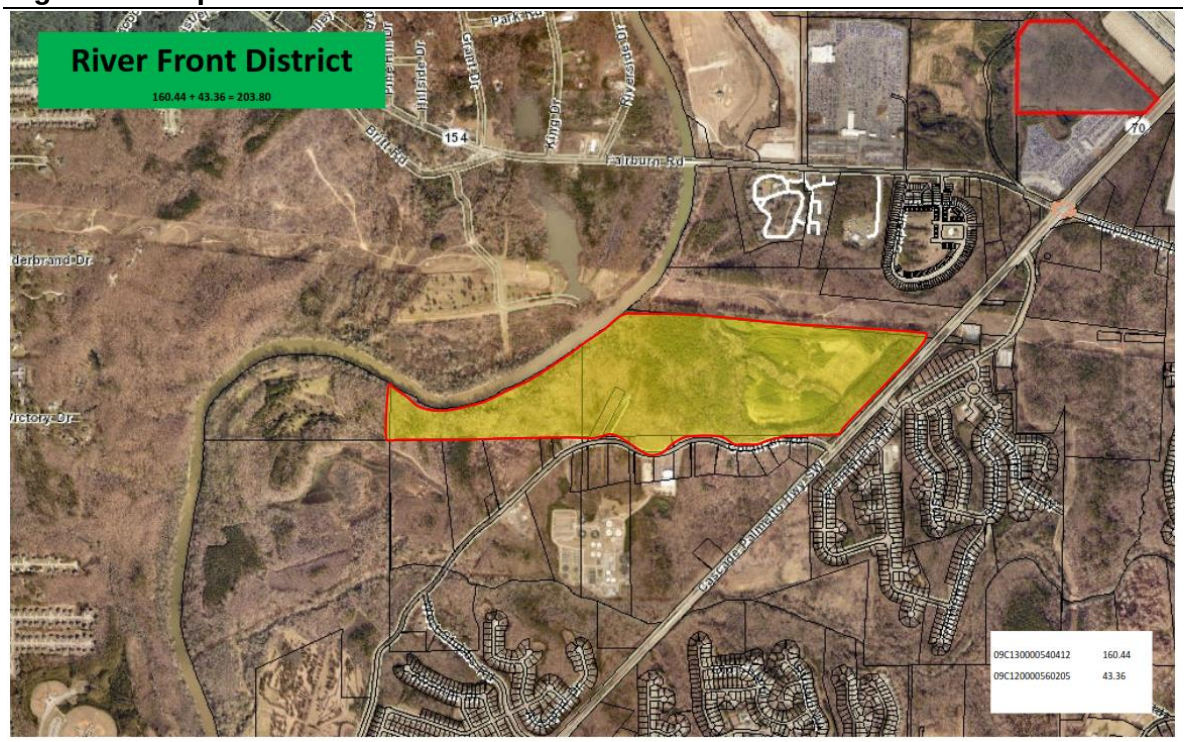
Figure 52: Map of Red Oak Historic District



River Front District

The River Front District is a 200-acre area located in City Council District 2 along the Chattahoochee River. A developer has plans to build a high-density mixed-use development in this focus area that features walkable blocks and streets with shopping, restaurants, and residences, with public spaces and public access to the Chattahoochee River. This development may be similar in design to the Avalon development in Alpharetta. See Figure 53 for a map of this area.

Figure 53: Map of River Front District Focus Area



South Fulton Parkway-Cedar Grove

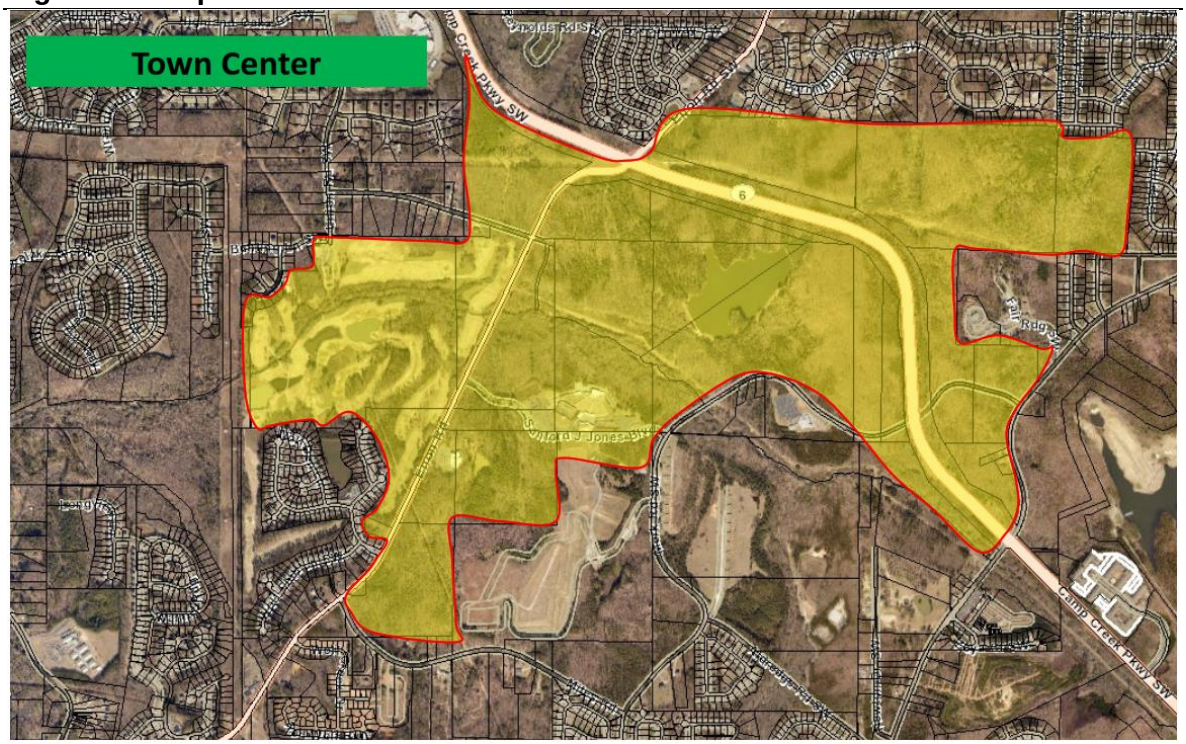
The South Fulton Parkway-Cedar Grove focus area is located in City Council District 4 in the southwest part of the city of South Fulton. Longer term plans for this area include local neighborhood-serving retail and restaurants, possibly some residential uses and small professional offices. See Figure 54 for a map of this area.

Figure 54: Map of South Fulton Parkway-Cedar Grove Focus Area

Town Center

The Town Center district is a 600-acre area located along Camp Creek Parkway that features a water amenity, Vandiver Lake. Most of this focus area (400 acres) lies in City Council District 2, but the remainder of the area is in District 1. A public-private partnership development is proposed for this district which will likely feature a government complex, public spaces, amenities, public parking, and a mix of commercial and residential development. The development will serve as a catalyst for the area by creating a market-based destination that will enhance the built environment, create jobs, improve mobility, and be sustainable through the years. The area is well served by major roads and easily accessible from all parts of the city of South Fulton and much of the Atlanta metropolitan area. See Figure 55 for a map of the area.

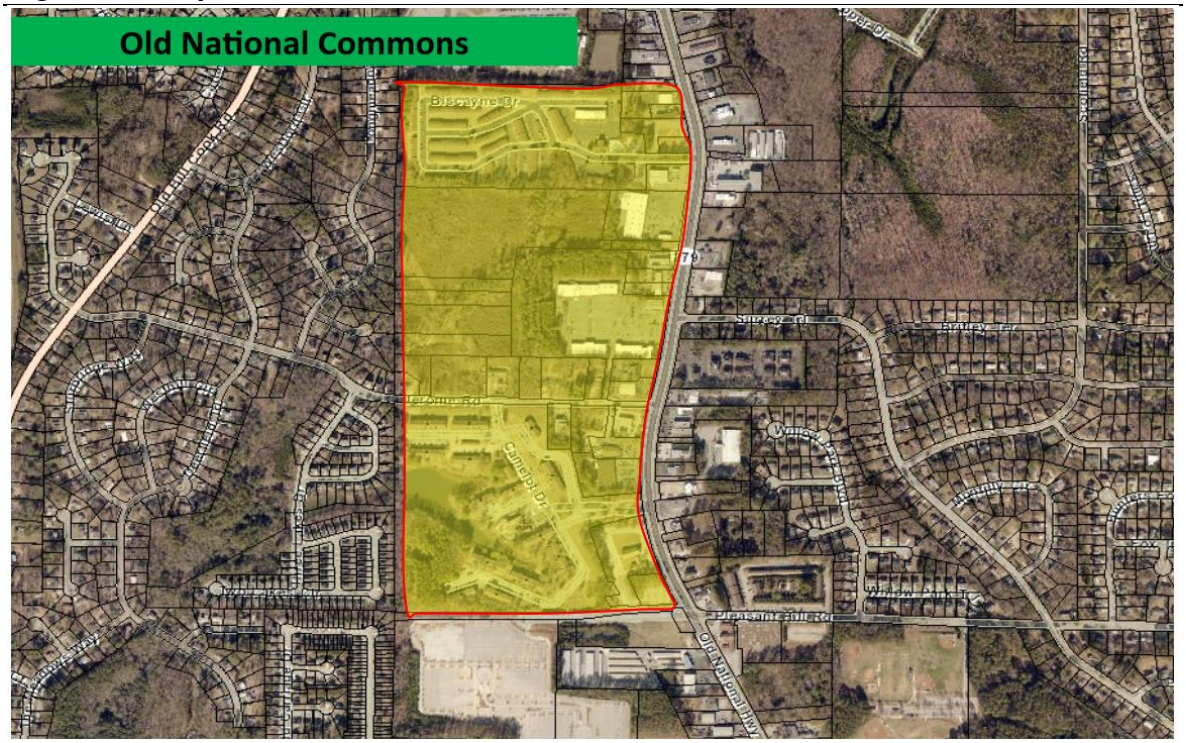
Figure 55: Map of Town Center Focus Area



Old National Commons

The Old National Commons district, located in City Council District 5 near the eastern edge of the city of South Fulton, is one of three focus areas located along Old National Highway. Presently, this area has two apartment complexes in need of major rehabilitation. The area also has vacant land with potential for infill development. The city recently received notice of designation in the Georgia Main Street Program and will be hiring a Main Street Manager to lead the revitalization effort for Old National as a whole (i.e., all three of the Economic Opportunity Focus Areas on Old National). The Georgia Main Street Program follows the National Main Street Approach using "Transformation Strategies" that stress economic vitality, design, promotion and organization to revitalize historic downtowns and commercial districts. See Figure 56 for a map of this area. There is also potential for a major hotel and meeting space directly across from World Changers Church.

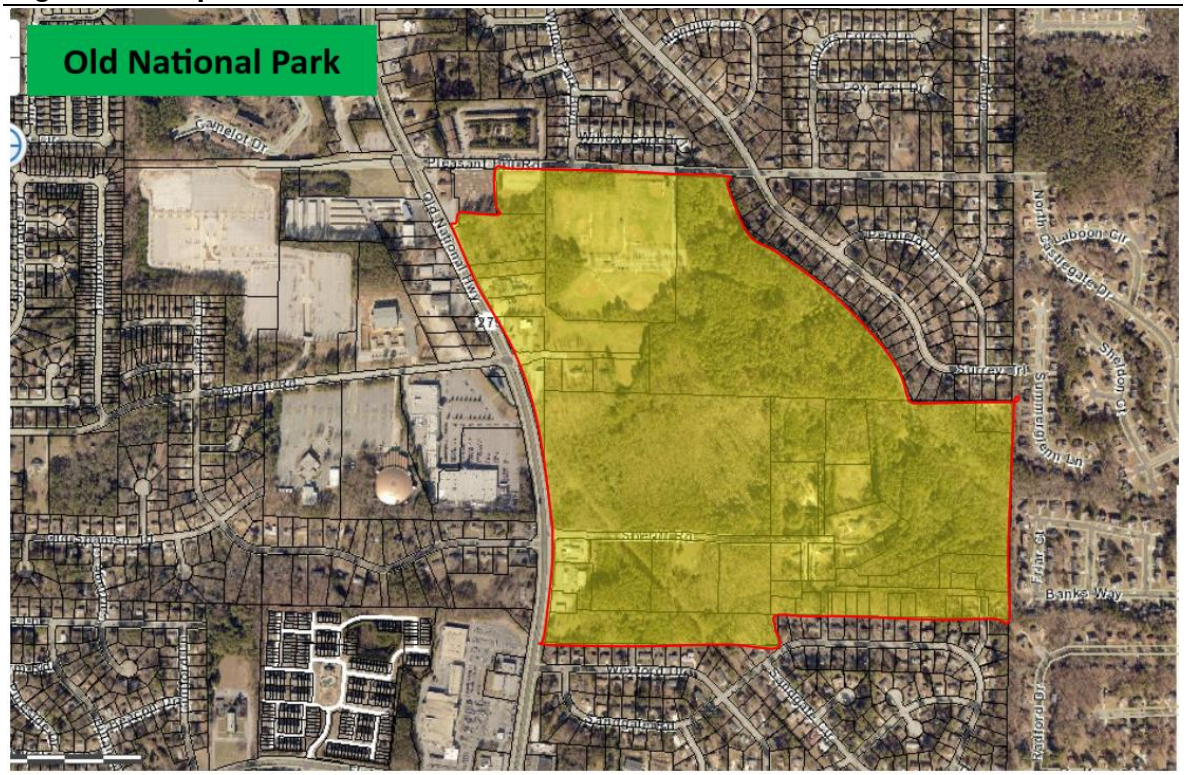
Figure 56: Map of Old National Commons Focus Area



Old National Park

The Old National Park district is located south of Old National Commons on the east side of Old National Highway in City Council District 6. Old National Park is a mostly vacant 80-acre site. This focus area is well-suited for a new high-density mixed-use development over the long term. As noted above this area is part of the Old National Main Street area. See Figure 57 for a map of this area.

Figure 57: Map of Old National Park Focus Area



Old National and Jonesboro Road

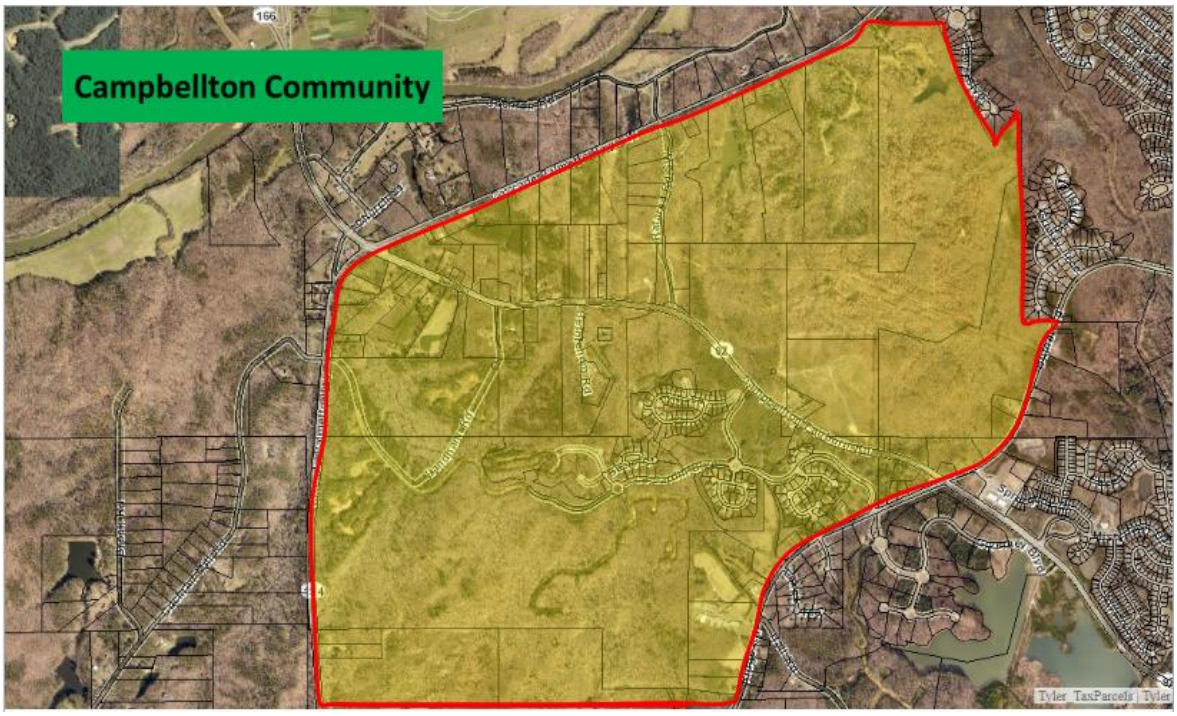
The Old National and Jonesboro Road District is located in the southeastern corner of the city of South Fulton in City Council District 7. The area is relatively small in size but sufficient enough for a small new development over the long-term that would include primarily neighborhood serving retail. As with the other two Old National focus areas, this stretch of Old National is part of the Old National Main Street area in the process of designation. See Figure 58 for a map of this area.

Figure 58: Map of Old National and Jonesboro Road Focus Area

Campbellton Community District

This focus area is partly located in the city of Chattahoochee Hills and partly in the city of South Fulton. The South Fulton portion is in City Council District 4. The idea behind the Campbellton Community District is to reconstitute Campbellton, the historic county seat of former Campbell County. The new Campbellton is a multi-jurisdictional project on the site of the historic town center location. A plan is being developed in 2020 (an RFP for a planning team was issued in December 2019) for a mixed-use village with shops, restaurants, other places of employment, housing and recreational opportunities including collaboration with the concurrent Chattahoochee Riverlands project. See Figure 59 for a map of this area.

Figure 59: Map of Campbellton Community District Focus Area



Competitive Assessment

Introduction to Competitive Areas

South Fulton's leadership and steering committee has identified six jurisdictions in the Atlanta metro area as "peer localities": Douglasville, College Park, Union City, Sandy Springs, Stonecrest, and Coweta County. This section examines these localities' demographics, recent employment trends, and economic development programs.

As shown in Table 12, South Fulton's peer localities range in size. By population, these localities range from roughly 15,000 to 149,000; total employment ranges from 7,600 to 103,000.

Table 12: Summary of Comparison Geographies, 2019

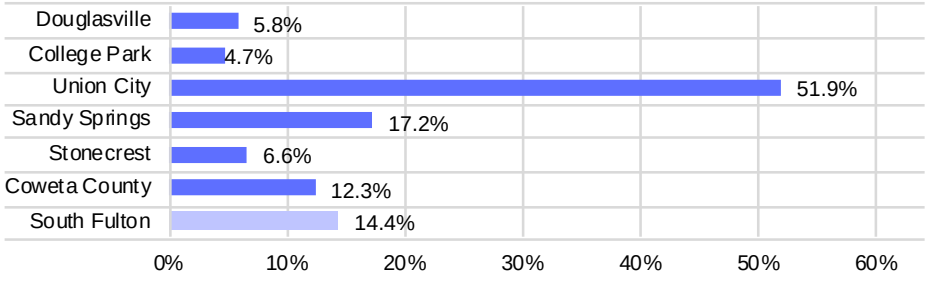
	Total Primary Jobs		Change	
Geography	**2013**	**2017**	**Number**	**Percent**
Douglasville	17,190	18,183	993	6%
College Park	26,272	27,503	1,231	5%
Union City	5,790	8,794	3,004	52%
Sandy Springs	103,880	121,771	17,891	17%
Stonecrest	15,558	16,584	1,026	7%
Coweta County	31,010	34,837	3,827	12%
South Fulton	*12,859*	*14,705*	*1,846*	*14%*

Notes:
(a) For College Park, Union City, and South Fulton, unemployment rate represents unemployment rate for balance of Fulton County outside BLS-identified localities with populations over 25,000. For Stonecrest, a similar calculation was performed for DeKalb County.

Sources: Esri Business Analyst; Fulton County, GA; Bureau of Labor Statistics; BAE 2020.

Most of these localities gained jobs between 2010 and 2015, with employment growing at rates ranging from 4.7 percent to 51.9 percent, as shown in Figure 60. South Fulton logged 14.4 percent growth in jobs over the same period.

Figure 60: Percent Change in Local Jobs, 2013 – 2017



Note: Includes primary jobs only.

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

As shown in Table 13, the peer localities with the largest job gains in both absolute terms – Sandy Springs and Coweta County – benefitted from a diverse industrial mix that includes a range of service-sector enterprises. In Sandy Springs, enterprises in the healthcare and social assistance, and finance and insurance category experienced the largest growth in employment between 2013 and 2017, equivalent to 40.8 percent of the city's total increase in employment. In Coweta County, administration & support, waste management and remediation added the largest number of jobs, though growth in the manufacturing and construction jobs was also notable. In Union City, the large growth in transportation and warehousing jobs is accompanied by a corresponding loss of transportation and warehousing jobs in South Fulton (2,002 new jobs in Union City versus loss of 722 jobs in South Fulton. Thus, there seems to be a shift regionally in the location of these jobs, and some modest growth in the industry regionally.

Table 13: Top Growth Industries of Peer Localities and South Fulton, 2013 – 2017

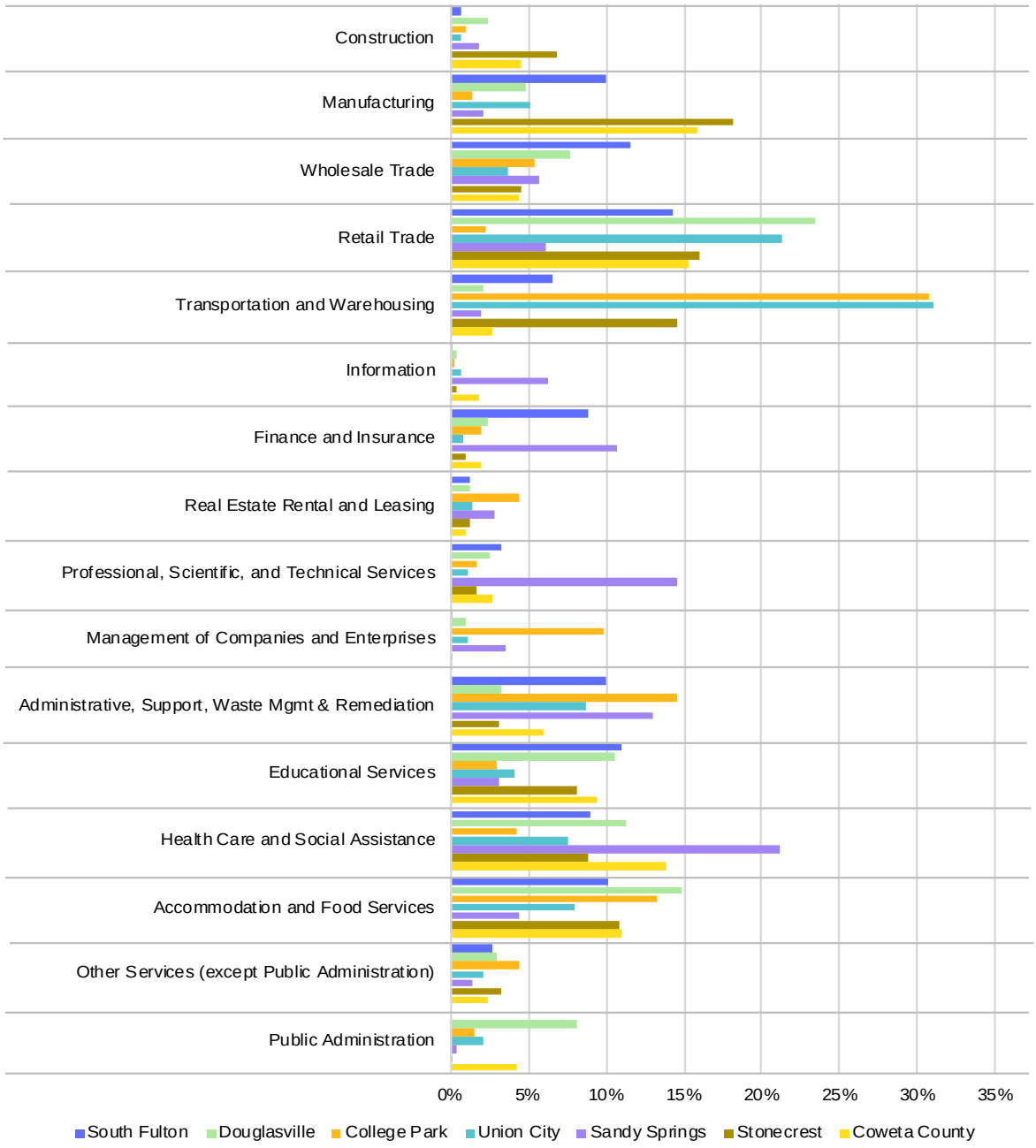
	Total Jobs		Change	
Geography / Top Growth Industries	**2013**	**2017**	**Number**	**Percent**
Douglasville	**17,190**	**18,183**	**993**	**5.8%**
Management of Companies and Enterprises	20	164	144	720.0%
Wholesale Trade	470	1,411	941	200.2%
Retail Trade	3,565	4,260	695	19.5%
College Park	**26,272**	**27,503**	**1,231**	**4.7%**
Management of Companies and Enterprises	1,171	2,701	1,530	130.7%
Administration & Support, Waste Management and Remediation	3,575	4,013	438	12.3%
Other Services (excluding Public Administration)	806	1,196	390	48.4%
Union City	**5,790**	**8,794**	**3,004**	**51.9%**
Transportation and Warehousing	728	2,730	2,002	275.0%
Health Care and Social Assistance	321	664	343	106.9%
Retail Trade	1,562	1,870	308	19.7%
Sandy Springs	**103,880**	**121,771**	**17,891**	**17.2%**
Health Care and Social Assistance	20,608	25,736	5,128	19.9%
Finance and Insurance	10,309	13,025	2,716	20.9%
Management of Companies and Enterprises	2,293	4,356	2,063	47.4%
Stonecrest	**15,558**	**16,584**	**1,026**	**6.6%**
Manufacturing	2,324	3,020	696	29.9%
Educational Services	985	1,351	366	37.2%
Retail Trade	2,297	2,655	358	15.6%
Coweta County	**31,010**	**34,837**	**3,827**	**12.3%**
Manufacturing	4,137	5,547	1,410	34.1%
Health Care and Social Assistance	3,783	4,843	1,060	28.0%
Construction	973	1,577	604	62.1%
South Fulton	**12,859**	**14,705**	**1,846**	**14.4%**
Administration & Support, Waste Management and Remediation	841	1,461	624	74.2%
Health Care and Social Assistance	822	1,311	489	59.5%
Manufacturing	1,005	1,472	467	46.5%

Note:
Includes primary jobs only.

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Sandy Springs' economy remains diverse and service-driven. As shown in Figure 61, health care and social assistance is Sandy Springs' top employer, accounting for more than 20 percent of jobs; professional, scientific, and technical services provide roughly 15 percent of jobs. Coweta County's industry mix is similarly diverse: no one sector accounts for more than about 15 percent of jobs. Retail trade is the top job-creating sector in Douglasville (more than 20 percent of jobs). In both College Park and Union City, transportation and warehousing enterprises account for 30 percent of jobs.

Figure 61: Local Jobs by Industry, 2017



Note:
Industries that account for one percent of jobs or less in all six geographies are not shown (Agriculture, Forestry, Fishing and Hunting; Mining; Utilities; and Arts, Entertainment, and Recreation).

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Economic Development Incentives and Resources

South Fulton's peer localities enjoy a range of economic development support. In some places, such as Union City, state-level programs (notably the Georgia State Opportunity Zone tax credit program) account for the majority of economic incentives available to businesses; others, such as College Park and Sandy Springs, offer more robust incentive programs through local economic development departments or authorities.

Most municipalities offer some form of site selection assistance, though the range and type of that assistance varies. The availability of bond financing through a local or county development authority is also a point of commonality.

The economic development infrastructure and resources available to South Fulton's peers are described below.

Douglasville, Douglas County, GA

The City of Douglasville has access to economic development resources on both the city and county level, though the bulk of the incentives available to incoming businesses operate through the Douglas County Economic Development Authority, which is charged with economic development for both Douglas County and Douglasville.

The City of Douglasville has two dedicated economic development staff: an Economic Development Manager within the Community Development Department, and a Main Street Coordinator associated with the Main Street Program, also overseen by Community Development.

The Douglas County Economic Development Authority has three staff: an executive director, a project manager in charge of existing industry and talent partnerships, and an executive assistant. Members of the authority's nine-person board, consisting of local business officials, also appear to carry some administrative responsibility.

Major programs and resources for businesses are outlined below.

<u>State Opportunity Zones.</u> Douglasville has several Georgia State Opportunity Zones. This designation gives portions of Douglasville an advantage in attracting businesses by increasing the value of state tax incentives – namely, the Job Tax Credit. In these areas, companies may qualify for the Job Tax Credit by creating two or more new jobs (as opposed to 15 new jobs in Tier Three counties such as Fulton and Douglas outside of opportunity zones). The value of the credit in these areas is $3,500 per job per year (compared to $1,750 in Tier Three areas). Credits may be applied to 100 percent of state corporate income tax liability (up from 50 percent), with the excess applied to state payroll tax withholding liability.

Federal Opportunity Zones. A small portion of Douglasville lies within census tracts that have been designated Federal Opportunity Zones under the Tax Cuts and Jobs Act of 2017. By investing in these areas through specially designated "Opportunity Funds," investors may defer tax on past capital gains, reduce their eventual capital gains tax liability, and, by remaining invested for 10 years, pay no tax on the return to their Opportunity Fund investments. This designation gives Douglasville an advantage in attracting investment capital, albeit only in the small portion of the city that lies within an Opportunity Zone.

Main Street Programs through Downtown Development Authority. Douglasville has created a Downtown Development Authority to stimulate the downtown area's retail sector and provide guidance and assistance on design to maintain the area's historic character. Monetary assistance is provided primarily through two small-dollar grant programs: a Façade Grant Program, which offers businesses up to $3,000 with which to renovate storefronts, and a Retail Incentive Program, which reimburses retailers who help diversify the downtown retail landscape with new store or product types for up to $1,000 in rent or mortgage expenses and up to $500 in marketing expenses. These grant programs account for the bulk of the City of Douglasville's direct provision of business incentives. The Department of Community Development also keeps a list of available properties in the downtown area. However, this list is not easily available online for perusal by incoming businesses.

Expedited Permitting. Douglasville's economic development staff have a limited ability to expedite permits when necessary, although there is no formal process for doing so. Under normal circumstances, permit requests are processed within seven to 10 days of submittal.

Site Selection and Temporary Office Space. The Douglas County Economic Development Authority works with businesses to locate suitable sites in Douglas County, using a database of available properties, GIS tools, and other resources. In addition, companies relocating to Douglas County have access to temporary office space in Douglasville while their facilities are being constructed.

Local Tax Incentive Program. Douglas County offers property tax abatements on five- and ten-year schedules to new and existing businesses that qualify based on a combination of capital investment, job creation, and wage standards. The level of abatement offered in each year of the incentive plan is set on a case-by-case basis. To qualify, a business must score at least three points on the following rubric:

- Minimum Wage: one point for a $15 per hour minimum wage, plus one additional point for every $2.50 over the $15 level
- Capital Investment: one point for every $7.5 million invested
- Employment: one point for every 35 employees
- Existing industries receive two points

Bond Financing. In the same manner as Fulton County, the Douglas County Economic Development Authority offers taxable and tax-exempt bonds backed by personal and real property as a means of providing low-cost financing to economic development projects.

Workforce Solutions and Employee Training. The Douglas County EDA serves as an intermediary between incoming businesses and a host of workforce development programs offered by local institutions and the state and federal governments. These include Georgia's QuickStart program, which provides customized workforce training for companies creating jobs in the state; training tax credits; and employee screening services.

Freeport Tax Exemption. Like South Fulton, Douglas County has enacted a 100 percent exemption from local inventory taxes for all goods in the process of being manufactured or produced; inventory of finished goods manufactured or produced in Georgia and held by the manufacturer or producer for up to a year; inventory of finished goods on January 1 that are stored in a warehouse, dock, or wharf and are destined for shipment outside Georgia within the year; and inventory held in a fulfillment center.

College Park, Fulton County, GA

The College Park Office of Economic Development consists of three full-time staff – a director, an economic development program manager, and a Main Street manager – and one part-time project manager, who also serves as director of airport affairs. Incentives that include bond financing and property tax abatements are administered through the College Park Business and Industrial Development Authority (BIDA); a separate entity led by a board of local business representatives. Major programs and resources for businesses are outlined below.

Site Location Assistance. College Park offers in-person tours and assistance to businesses seeking sites and facilities in the city. They do not, however, offer an online site-location portal as some other municipalities do.

Architectural Guideline for Priority Areas. The city has enacted a set of Downtown Design Standards to help guide new development in the Main Street/Virginia Avenue area. A separate zoning overlay provides architectural standards for the Old National Highway area.

State Enterprise Zones. College Park contains two Georgia Enterprise Zones – one in the city's downtown, and another containing parts of the Old National Highway and Godby Road corridor. Companies located in these zones may obtain real and personal business property tax abatements through an agreement with the city in return for meeting minimum employment requirements (set on a case-by-case basis).

State Opportunity Zone. A portion of College Park lies within a State Opportunity Zone, offering businesses an enhanced Job Tax Credit as described above. This zone is adjacent to

Hartsfield-Jackson Atlanta International Airport and is therefore likely to attract businesses with a need for ready access to air transportation.

Federal Opportunity Zone. College Park contains a Federal Opportunity Zone that is adjacent to Hartsfield-Jackson Atlanta International Airport. This designation gives College Park an advantage in attracting investment capital, which, due to the location of the Opportunity Zone, may be particularly useful in developing industries such as trade that are reliant on easy air access.

Tax Allocation Districts. College Park has created a process for incoming businesses to seek authorization for Tax Allocation Districts, which provide a stream of development funding backed by future property tax revenues. This involves submitting a letter of intent, obtaining consent from the city's mayor and council, and approval by the College Park BIDA.

Bond Financing. The College Park BIDA offers Industrial Revenue Bond financing under the same conditions as the Development Authority of Fulton County.

Property Tax Abatements. The College Park BIDA offers property tax abatements to incoming businesses on a per-project, negotiated basis. These are extended only when they are necessary for a project to proceed, and when that project would bring substantial investment to the city.

Union City, Fulton County, GA

Union City has neither a full-time economic development staff, nor a formal economic development department. Economic development functions are handled on an ad-hoc basis by the Department of Community Development. Following is a list of major programs and resources for local businesses.

State Opportunity Zone. Much of Union City lies within a State Opportunity Zone, offering businesses an enhanced Job Tax Credit as described above. This designation is due to expire in 2019; however, the city is currently seeking a renewal.

Georgia Foreign Trade Zone (FTZ). Sections of Union City along South Fulton Parkway lie in a federally designated Georgia Foreign Trade Zone, within which companies enjoy delayed or reduced duties on imported components and merchandise and duty-free exports. These reduced effective duty rates are intended to make companies within the FTZ more competitive with foreign enterprises and have the effect of attracting foreign and domestic import-export businesses to the designated area.

Freeport Tax Exemption. Like South Fulton, Union City has enacted a 100 percent exemption from local inventory taxes for all goods in the process of being manufactured or produced;

inventory of finished goods manufactured or produced in Georgia and held by the manufacturer or producer for up to a year; inventory of finished goods on January 1 that are stored in a warehouse, dock, or wharf and are destined for shipment outside Georgia within the year; and inventory held in a fulfillment center.

Tax Allocation Districts. Union City currently contains one tax allocation district that includes industrial, commercial, and residential development, including Atlanta Metro Studios.

Business License Fee Cap. Union City caps annual business license fees for various types of business at a level dependent upon the profitability ratio for that category of business. At maximum, annual fees are capped at $35,000, plus a $25 processing charge.

Vacant Site Directory. Union City maintains an attractive "look book" of vacant commercial properties on its website, as well as an interactive ArcGIS-hosted parcel map, with commercial and industrial parcels prominently featured.

Sandy Springs, Fulton County, GA

Sandy Springs' Office of Economic Development consists of a staff of two – one director, and one economic development specialist – that works closely with the city's Community Development department. The department oversees the Sandy Springs Development Authority, a seven-member body that meets on an ad-hoc basis to issue financing for qualifying projects. The department offers several resources and incentives for incoming companies, described below and on the following pages.

Economic Incentive Program. Companies making at least $1 million in capital investments and creating at least 15 jobs that pay at least $75,000/year qualify for an incentive package that includes expedited permitting (described below) and waivers for business license, building, and impact fees for up to three years.

Small Business Incentive Program. Small businesses located in the city's seven Priority Redevelopment Areas have access to the same incentives offered under the Economic Incentive Program with lower investment and employment requirements. Notably, there is no wage requirement attached to the jobs that must be created to qualify. This program is structured in three tiers:

1. Companies investing at least $250,000, creating at least five jobs, and committing to remain in Sandy Springs for at least four years receive expedited permitting and a one-year fee waiver.
2. Companies investing at least $500,000, creating at least ten jobs, and committing to remain in Sandy Springs for at least seven years receive expedited permitting and a two-year fee waiver.

3. Companies investing at least $750,000, creating at least 15 jobs, and committing to remain in Sandy Springs for at least ten years receive expedited permitting and a three-year fee waiver.

Expedited Permitting. Subject to City Council approval, the Economic Development department may authorize expedited permitting for an incoming business. This moves a company's permit application to the front of the queue; currently, processing time for non-expedited permits is roughly 14 days.

Site Location Services. In place of a static site catalog or a custom site location platform, Sandy Springs directs those seeking a list of available sites to custom search results from a selection tool hosted by Georgia Power.

Research Support. In addition to incentive programs, Sandy Springs' economic development department offers to conduct research for incoming businesses on topics including available real estate, financial incentives and business taxes, permits and licenses, and demographic and economic data. The department also offers to arrange for introductions to community leaders and tours of the community, including potential sites.

State Opportunity Zone. A portion of Sandy Springs surrounding the intersection of Roswell Road and I-285 constitutes a State Opportunity Zone, offering businesses an enhanced Job Tax Credit as described above. This designation is due to expire in 2020 but may be renewed at the discretion of the Commissioner of the Department of Community Affairs.

Bond Financing. The Sandy Springs Development Authority offers taxable and tax-exempt bond financing under conditions identical to those offered by the Development Authority of Fulton County. In practice, the SSDA handles projects whose primary impact is in the city, while the DAFC plays a role in financing larger projects (such as Mercedes-Benz USA's headquarters, which opened in 2018).

Stonecrest, DeKalb County, GA

The City of Stonecrest, GA, was incorporated in 2016. It has a small economic development department, consisting of one full-time director. The economic development department offers limited assistance to companies searching for real estate in the city of Stonecrest. Companies locating in Stonecrest also have at their disposal DeKalb County's robust set of economic development incentives and tools, most of which are managed through the Decide DeKalb Development Authority (DDDA), the county's economic development arm. The DDDA consists of a two-person executive team and five staff and is overseen by a seven-person board that fulfills limited administrative duties.

Major tools and resources offered at the county and city levels are described below.

DeKalb County Economic Incentive Policy. DeKalb County offers incentives to support new investment and job creation in the areas of Professional and Business Services, Life Sciences, Tourism, Logistics, Construction and Support Trades, and Advanced Manufacturing. To secure permit fee reductions and tax abatements, projects must meet investment and job creation thresholds outlined in Table 14**Error! Reference source not found.**. Developers may also secure matching funds for water and sewer capacity upgrades by providing a certain level of new water and sewer revenues, as outlined in Table 14. Applicants must demonstrate that the relevant investments would not occur but for incentives offered by the county.

Table 14: DeKalb County Economic Incentive Program Outline

Tier	Taxable Investment Range	Job Creation Minimum	Water/Sewer Revenue Threshold	Incentives
I	$10 million to $15 million	20	$100,000	Permit discounts of 50% on General Contractor Fees; Business occupation taxes capped at $1,000 for one year; Up to $100,000 in matching funds for water/sewer improvements costing no more than $200,000
II	$16 million to $20 million	30	$200,000	Permit discounts of 60% on General Contractor Fees; Business occupation taxes capped at $1,000 for two years; Up to $200,000 in matching funds for water/sewer improvements costing no more than $400,000
III	$21 million to $30 million	40	$300,000	Permit discounts of 70% on General Contractor Fees; Business occupation taxes capped at $1,000 for three years; Up to $300,000 in matching funds for water/sewer improvements costing no more than $600,000
IV	$31 million to $50 million	60	$400,000	Permit discounts of 80% on General Contractor Fees; Business occupation taxes capped at $1,000 for four years; Up to $400,000 in matching funds for water/sewer improvements costing no more than $800,000
V	$51 million to $75 million	100	$500,000	Permit discounts of 100% on General Contractor Fees; Business occupation taxes capped at $1,000 for five years; Up to $500,000 in matching funds for water/sewer improvements costing no more than $1 million
VI	$76 million and above	100	$750,000	Permit discounts of 100% on General Contractor Fees; Business occupation taxes capped at $1,000 for five years; Up to $750,000 in matching funds for water/sewer improvements costing no more than $1. million

Source: DeKalb County Board of Commissioners; BAE 2019.

Applicants obtaining one or more sustainable building certification receive a 15 percent credit toward the required investment to obtain all incentives. In addition, projects where sewer usage is 30 percent or less of water usage will receive 50 percent discount in sewage rates for five years.

Projects investing at least $10 million may request an expedited permit process. If agreed to, DeKalb County will agree to do a ten-day review for all land development and building permits and will designate a single point of contact for the developer within county government.

Any company receiving incentives must cooperate with DeKalb County Workforce Development Agency to advertise the jobs created during the development process. These companies are also required to take advantage of agency services as appropriate. These services include job candidate recruitment and screening, occupational skills and work-based training, skills assessments for new and existing employees, and layoff aversion solutions.

Property Tax Abatements. Through the Decide DeKalb Development Authority (DDDA), the county offers tax abatements on property developed or acquired in the course of new investments. The level of tax abatement is decided based on the project's direct economic impact on DeKalb County. Incentives may be applied across 10, 15, or 20 years.

Bond Financing. Like the Development Authority of Fulton County, DDDA serves as a conduit issuer for companies and institutions seeking taxable or tax-exempt bond financing.

Freeport Exemptions. Like South Fulton, DeKalb County has enacted a 100 percent exemption from local inventory taxes for all goods in the process of being manufactured or produced; inventory of finished goods manufactured or produced in Georgia and held by the manufacturer or producer for up to a year; inventory of finished goods on January 1 that are stored in a warehouse, dock, or wharf and are destined for shipment outside Georgia within the year; and inventory held in a fulfillment center.

Down Payment Assistance. Through the WE DeKalb program, DDDA offers down payment grants of up to five percent to applicants seeking to purchase or refinance a home in the county. Buyers using the Freddie Mac HFA Advantage loan are eligible for an additional $2,500 in grant funding.

The WE DeKalb program was specifically designed to assist employers in DeKalb County in their efforts to attract and retaining talent and is targeted at potential homebuyers whose incomes exceed levels needed to qualify for affordable housing subsidies. The maximum qualifying income of a two-person household is currently $81,900; for a household of three or more people it is $95,600.

Coweta County, GA

Coweta County conducts economic development activities primarily through the Coweta County Development Authority, which is staffed by a president and a director of existing industries and workforce development. Members of the authority's seven-person board, which consists of local business and community leaders, also fulfill administrative functions. Following is a list of incentives and resources available to businesses in Coweta County.

Bond Financing. As in Fulton County, the Coweta County Development Authority serves as conduit for taxable and tax-exempt Industrial Revenue Bond issuance. These serve as a

source of low-cost financing for economic development projects and may be used for the purchase or development of land, buildings, machinery, and equipment.

Property Tax Reduction. Communities may choose to offer property tax reductions for economic development projects on a discretionary basis. The length of time that these reductions are offered typically depends on such factors as the number of jobs a business will create in a particular community.

Freeport Exemptions. Like South Fulton, Coweta County has enacted a 100 percent exemption from local inventory taxes for all goods in the process of being manufactured or produced; inventory of finished goods manufactured or produced in Georgia and held by the manufacturer or producer for up to a year; inventory of finished goods on January 1 that are stored in a warehouse, dock, or wharf and are destined for shipment outside Georgia within the year; and inventory held in a fulfillment center.

Expedited Local Permitting. Municipalities in Coweta County are "committed to expediting local permitting" for incoming companies, according to the Coweta County Development Authority, though the extent to which permits are expedited varies by locality. Cities may schedule pre-submittal meetings to help companies navigate permitting processes and may provide qualified projects a single point of contact within local government to address questions and concerns as the project progresses.

Coweta Job Creation Grant Program. Overseen by the Coweta County Development Authority, the Coweta Job Creation Grant Program awards funds on a discretionary basis to "key" projects in the county. Award decisions are made in reference to the number of jobs a project creates, and at what wage rate. Grants made through this program may be used to reduce construction costs.

Central Educational Center (CEC). Companies located in Coweta County have the opportunity to work with the Central Education Center, a career-focused charter school formed through a partnership of industry representatives, the Coweta County School System, and West Georgia Technical College. The school's curriculum is designed to meet the current and projected needs of business in the county, with the aim of developing a workforce suited to those needs.

Summary of Key Findings – Existing Conditions

Demographic and Economic Conditions and Trends

- South Fulton has approximately 100,176 residents and 36,171 households, experiencing relatively high population and household growth rates in recent years. From 2010 to 2019, the city's population grew faster than Fulton County and the Atlanta metro area. South Fulton's household growth rate during this period was also higher than the surrounding geographies

- While nonfamily households grew at a faster rate than family households in Fulton County and the metro Atlanta area, the rate of growth for both family households and nonfamily households was almost the same in South Fulton. Additionally, family households comprise 69.3 percent of all households in South Fulton, which is higher than in the Atlanta Metro Area and much higher than in Fulton County

- The large proportion of family households in South Fulton translates into a relatively large average household size. The average household size in South Fulton is 2.76, as compared to 2.35 in Fulton County and 2.69 in the Atlanta Metro Area

- South Fulton has a greater share of residents under 18 than Fulton County and the Atlanta Metro Area as well as a slightly greater share of residents aged 35 to 44. This corresponds to the relatively large share of family households in South Fulton

- From 2010 to 2019, the City of South Fulton experienced population growth across all age groups. The city's fastest-growing age cohort is comprised of residents aged 65 or older. Other age groups that experienced relatively high growth during this period are 18 to 24, 45 to 54, and 55 to 64

- The population of South Fulton is predominantly comprised of black/African American residents (89.5 percent). Approximately 5.1 percent of residents identify as white, while 2.5 percent identify as Hispanic/Latino. From 2010 to 2018, the number of black/African American residents in South Fulton increased by 19.3 percent, the number of white residents increased by 9.3 percent, and the number of Hispanic/Latino residents increased by 7.1 percent

- South Fulton has a larger percentage of households in middle income categories than both Fulton County and the Atlanta metro area, which have greater number of households in very low- and very high-income categories. South Fulton has a smaller proportion of households that earn more than $150,000 annually as compared to the surrounding geographies. However, Fulton County has a larger percentage of households earning less than $15,000 annually than the city of South Fulton or the Atlanta metro area. The median household income in South Fulton is $59,540,

compared to $66,925 in Fulton County and $66,656 in the Atlanta Metro Area

- Approximately 12.2 percent of households in South Fulton are below the poverty line (3,850 households). South Fulton's poverty rate is slightly lower than that of Fulton County and the Atlanta metro Area

- A larger portion of South Fulton homeowner households are cost-burdened than Fulton County or the Atlanta metro area. South Fulton renter households are also disproportionately cost-burdened as compared to the surrounding geographies.

- More than 92 percent of South Fulton residents aged 25 or older have at least a high school diploma. This is comparable to the high school diploma attainment rate in Fulton County and slightly higher than that of the Atlanta metro area. Approximately 35 percent of South Fulton residents aged 25 or older hold a bachelor's degree or higher; this is significantly lower than in Fulton County (52.0 percent) and just slightly lower than in the metro area

- As of 2018, the unemployment rate in South Fulton was 5.2 percent. In the county, metro area, and U.S., the 2018 unemployment rates were between 3.8 and 4.0 percent. While slightly higher than the county, metro area and nationally, South Fulton experienced the steepest decline in unemployment, falling from 10.4 percent in 2013

- As compared to the county and metro area, South Fulton has larger proportions of residents employed in transportation and warehousing, healthcare and social assistance, and accommodation and food service, but notably smaller proportions of residents employed in professional, scientific, and technical services

- In South Fulton during the 2013 – 2017 time period, the administrative support, waste management and remediation sector gained the most jobs (624). Other industries that gained relatively large numbers of jobs include health care and social assistance, manufacturing, and retail trade

- The largest private employers in South Fulton include Bank of America, several retail businesses (Walmart Supercenter, Kroger, and Home Depot), a wholesale trade business (United Natural Foods), a professional services firm (Miller Zell) and the World Changers Church International. Additionally, there are a variety of relatively large public sector organizations; most of these are schools (categorized by the Bureau of Labor Statistics as educational service providers).

- Approximately half of South Fulton residents work in Fulton County. However, only 3.0 percent of South Fulton residents work in the city itself, while 30.6 percent work in the

city of Atlanta. Other counties to which significant proportions of South Fulton residents commute include DeKalb County, Cobb County, and Clayton County

- Approximately 26.9 percent of South Fulton workers commute from locations within Fulton County. Approximately 7.9 percent of South Fulton workers also live in South Fulton, while 9.8 percent live in Atlanta. Other counties from which significant proportions of South Fulton workers commute include Clayton County (11.0 percent), Cobb County (8.7 percent), and DeKalb County (8.5 percent)

- The majority of employed South Fulton residents spend between 15 and 44 minutes commuting to work. The vast majority of employed South Fulton residents drive to work, although 5.4 percent use public transportation

Projections

- From 2018 to 2040, the population of South Fulton is expected to grow from 100,176 to 124,114, representing an increase of 23.9 percent. The number of households is expected to grow from 36,171 to 46,195, representing an increase of 27.7 percent.

- These expected growth rates are comparable to – but slightly lower than – projected rates of population and household growth in Fulton County. By contrast, the Atlanta Region[5] is expected to grow at significantly faster rates. From 2018 to 2040, the region's population is expected to increase by 37.6 percent and the number of households are expected to increase by 40.8 percent

Real Estate Market Conditions and Trends

General Housing Stock Characteristics

- Approximately two-thirds of housing units in South Fulton are owner-occupied while 26.3 percent are renter-occupied. By contrast, the county and metro area have larger proportions of renter-occupied housing units, although they also have much higher rate of vacant housing units

- From 2010 to 2018 the number of owner-occupied and renter-occupied units increased while vacant units decreased in all three geographies. However, in South Fulton, the growth rate of owner-occupied units was markedly higher than in the county

[5] Atlanta Regional Commission (ARC) projection data is not available for the 29-county area defined as the Atlanta Metro Area in this report. The above data reflects projected growth for the Atlanta Region, defined as the 20 counties for which ARC produces forecasts. Exhibit A-2 in the Appendix contains a list of these 20 counties.

and metro area. The percent decline in vacant units was also significantly more pronounced in South Fulton during this time period than in the county and metro area.

- In South Fulton, more than three quarters of housing units are single family homes. Indeed, Fulton County has a larger proportion of units in multifamily units than the City of South Fulton, due to the urbanized environment of large portions of the county. However, the breakdown of housing units in the Atlanta Metro Area is more comparable to that of South Fulton.

- In South Fulton, more than half of housing units were constructed in 2000 or later. By contrast, only 26.7 percent of units in Fulton County and 28.5 percent of housing units in the Atlanta Metro Area were constructed in 2000 or later. All three geographies experienced a relatively large amount of new residential development between 2000 and 2009, particularly the City of South Fulton.

Multifamily Rental Market

- According to CoStar, there are 3,986 market-rate multifamily units in South Fulton. In South Fulton, nearly three quarters of market-rate multifamily rental units have two or more bedrooms, which is a much higher rate than in Fulton County and the metro area. This is likely driven by the relatively large share of family households in South Fulton.

- While rents have consistently been lower in South Fulton than the surrounding geographies since 2010, the price gap has widened over the 2010 – Q1 2019 time period. As of the first quarter of 2019, the average rent for a two-bedroom unit in South Fulton was $1,019, as compared to $1,502 in Fulton County and $1,286 in the Atlanta Metro Area.

- From 2010 to 2018, South Fulton experienced no market-rate multifamily unit development. By contrast, Fulton County and the Atlanta Metro Area experienced significant rates of multifamily development every year from 2013 to 2018.

- Since 2010, multifamily vacancy rates in South Fulton have consistently been higher than in the county and metro area. During the 2010 – Q1 2019 time period, the average annual multifamily vacancy rate in South Fulton has ranged from a low of 12.2 percent (in 2013) to a high of 21.0 percent (in 2017). As of the first quarter of 2019, the average multifamily rental vacancy rate in South Fulton was 15.3 percent, as compared to 11.3 percent in Fulton County and 8.4 percent in the Atlanta Metro Area.

For-Sale Housing Market

- In South Fulton, more than 88 percent of homes sold between April 2018 to March 2019 were single family homes, while 10.4 percent were townhomes and 1.2 percent were condominiums. This is similar to the Atlanta Metro Area

- Over half of single family homes sold in South Fulton during the April 2018 – March 2019 period had four or more bedrooms, which was a much higher rate than in Fulton County and the Atlanta metro area. On the other hand, a small percentage of homes sold in South Fulton had two or fewer bedrooms, compared to much higher rates in the other geographies

- The median sale price of a single family home in South Fulton was $186,450 during the April 2018 – March 2019 period, as compared to $279,000 in Fulton County and $223,000 in the Atlanta Metro Area

- The price gap between homes in South Fulton and homes in the surrounding geographies is more pronounced for townhomes and condominiums than for single family homes. The median sale price of a condominium in South Fulton during was only $33,450; however, it should be noted that only 12 condominiums sold in South Fulton during this time period, and nine of those units were located in the Camelot Condominium residential community located off of Old National Highway east of I-85

- South Fulton, Fulton County, and the Atlanta Metro Area began experiencing consistent post-recession median home price increases in 2013, which have continued each year since. In South Fulton, annual increases in the median home sale price were relatively steep from 2013 to 2016 (more than 10 percent annually each year); in 2017 and 2018 annual median home sale price increases were more modest (3.1 percent and 6.4 percent, respectively)

- In South Fulton, homes that sold for relatively high prices from April 2018 – March 2019 (between $205,000 and $259,999 and more than $260,000) were generally located in the northwest portion of the City, west of I-85. Meanwhile, homes that sold for less than $135,000 and homes that sold for between $135,000 and $169,000 were generally located in the southeast portion of the city, east of I-85

Retail Market

- According to CoStar, there are approximately 2.6 million square feet of retail space in South Fulton. From 2010 to 2016, retail rents in South Fulton were relatively stable; however, between 2016 and 2017, the average annual retail rent declined by 31 percent, falling from $13.56 to $9.36. In the first quarter of 2019, the average annual

retail rent per square foot was lower in South Fulton than in Fulton County and in the Atlanta Metro Area

- In 2012, the City of South Fulton experienced a significant amount of retail development in (100,853 square feet, the equivalent of 3.9 percent of the city's total retail inventory that year). Relatively modest amounts of retail development (between 4,000 and 15,000 square feet) also occurred in 2010, 2015, 2016, and 2017

- From 2010 to 2014, retail vacancy rates in South Fulton were lower than those in the surrounding geographies. However, since 2015, retail vacancy rates have been similar in all three geographies

- From 2010 to 2018, annual retail absorption rates in South Fulton were mostly positive. However, in 2013, 2015, and 2018, retail net absorption fell slightly below zero. By contrast, annual net absorption rates in the surrounding geographies were consistently above zero every year from 2011 through 2018. In 2018, the annual net absorption rate was negative 0.9 in South Fulton, as compared to 0.6 percent in Fulton County and 0.8 percent in the Atlanta Metro Area

Office Market

- The asking rent in in the first quarter of 2019 in South Fulton was $14.64, which is less than in Fulton County ($27.72) and the Atlanta Metro Area ($24.12)

- From 2010 to 2014, office rents in South Fulton were relatively stable. From 2014 to 2015, the average office rent increased by 6.3 percent; over the following three years, the average office rent decreased by 21.2 percent. By contrast, average office rents in the county and metro area have consistently increased since 2011

- South Fulton experienced significant spikes in office development in 2010, as well as 2014. South Fulton also experienced modest amounts of new office development in 2011 and 2013. From 2015 to 2018, South Fulton did not experience any new office development

- Office vacancy rates in South Fulton are significantly lower than in the surrounding geographies, although this also reflects the limited supply of office space in the city

Industrial Market

- Industrial/flex rents in South Fulton fluctuated during the 2010 – 2018 period, first decreasing by 40.7 percent from 2010 to 2012, and then increasing by 93.8 percent from 2013 to 2016. As of the first quarter of 2019, the average annual industrial/flex

rent in South Fulton was $3.60, as compared to $5.04 in Fulton County and $4.80 in the Atlanta Metro Area

- All three geographies experienced relatively significant amounts of industrial/flex development from 2015 to 2018, particularly South Fulton. From 2015 through the first quarter of 2019, South Fulton added approximately 1.4 million square feet of industrial/flex space. This includes the Graham Logistics Center, the Airport-West Distribution Center, Lakeview Business Park, and the Flat Shoals Distribution Center

- From 2010 to 2016, industrial/flex vacancy rates followed a relatively consistent downward trend in all three geographies. South Fulton experienced a spike in vacancy in 2017, and again in 2019, likely due to the sharp increase in available industrial/flex space in recent years. In the first quarter of 2019, South Fulton's industrial/flex vacancy rate was 10.0 percent, as compared to 5.5 percent in both the county and the metro area

Education

- South Fulton high schools performed at or below Fulton County high schools on Career and College Readiness Index (CCRI) Single Scores. Two out of five middle schools in South Fulton performed above median scores for Fulton County middle schools, while seven out of the thirteen elementary schools in South Fulton are at or above the Fulton County median

- Fulton County schools have robust career and technical education opportunities, including special 'pathways' for subjects including architecture and construction, technology and communications, agriculture and business administration.

Transportation

- Two agencies provide public transportation service to South Fulton (MARTA and SRTA) including both bus and light rail service. While there is access to public transportation in east and north South Fulton, the central-west and southwest portions of the city lack convenient access to these services

Workforce Development

- South Fulton residents have access to several Atlanta-region workforce development opportunities, including state and federal programs. The city of South Fulton itself plans to provide a Small Business Resource Center & Incubator early in 2020 that equips small and emerging businesses with resources that cover all aspects of starting and operating a business

Notable Planned Developments

- The Vesta Red Oak Apartments project is a planned workforce housing development of 220 apartments that will have rents aimed at those earning between 60 and 80 percent of area median income (AMI). The developer, Middleburg Communities, has extensive experience developing and operating high quality, energy efficient workforce housing

- Halpern's Steak and Seafood Company is planning a $27 million investment in South Fulton that will add a new 47,000 square foot building to the company's current manufacturing and distribution center in the city. The expansion will support 46 new jobs and is estimated to have an economic impact of $119 million on South Fulton and Fulton County.

- Other notable planned developments include a new 67,000 square foot Publix at Sandtown Crossing, a Senior Community and the Atlanta regions Jobs Corps Training Center

Economic Opportunity Focus Areas

- Nine focus areas within South Fulton have been identified for development, redevelopment and/or revitalization, and are dispersed throughout the City. Each focus area is associated with projects that are either ongoing or planned for in the near to long-term future.

- Planned developments include a new Publix, the revitalization of a historic district, the development of a riverfront district, commercial and mixed-use projects with new retail and restaurants, and a new Town Center. Planned developments will create new housing and recreation opportunities throughout the city as well as an increase in public spaces.

Competitive Assessment

- South Fulton's leadership and steering committee has identified six jurisdictions in the Atlanta Metro Area as "peer localities": Douglasville, College Park, Union City, Sandy Springs, Stonecrest, and Coweta County.

- All of these localities gained jobs between 2013 and 2017, with employment growing at rates that mostly ranged from 4.7 percent to 17.2 percent. South Fulton experienced 14.4 percent growth in jobs over the same period. The exception to this trend is Union City, which increased jobs by 51.9 percent between 2013 and 2017. This large percentage gain is due to a low base number of employees in 2013 and the

addition of several new large warehouse/distribution facilities added in recent years in Union City.

- In Sandy Springs, the health care and social assistance industry accounts for over 20 percent and was also one of the two fastest growing job sectors in the City, with the finance and insurance adding 2,719 (20.9%) more jobs. Coweta County's industry mix is similarly diverse: no one sector accounts for more than 15 percent of jobs. Wholesale Trade is the top job-creating sector in Douglasville (adding 941 jobs) and in Union City, which added 2,002 new jobs in this sector, representing a 275 percent growth. In College Park, the management of companies and enterprises added 1,530 new jobs. In South Fulton, administration & support, waste management and remediation, health care and social assistance and manufacturing added a similar number of jobs (over 1,300 each), with administration & support, waste management and remediation showing the fastest rate of growth at 74.2 percent.

- South Fulton's peer localities enjoy a range of economic development support. In some places, such as Union City, state-level programs (notably the Georgia State Opportunity Zone tax credit program) account for the majority of economic incentives available to businesses; others, such as College Park and Sandy Springs, offer more robust incentive programs through local economic development departments or authorities. Most municipalities offer some form of site selection assistance, though the range and type of that assistance varies. The availability of bond financing through a local or county development authority is also a point of commonality.

COMMUNITY INPUT

Community input regarding the strengths, weaknesses, opportunities, and threats is critical to understanding the existing economic conditions facing South Fulton and served as guide for developing economic development recommendations for the city. Community input was obtained from residents and businesses. A resident survey yielded 664 responses. Businesses responded to a survey or participated in an interview. Between the two methods, BAE collected 111 responses for business owners or representatives. Finally, resident and business input were also collected from three focus group sessions and three SWOT analysis sessions.

Resident Input

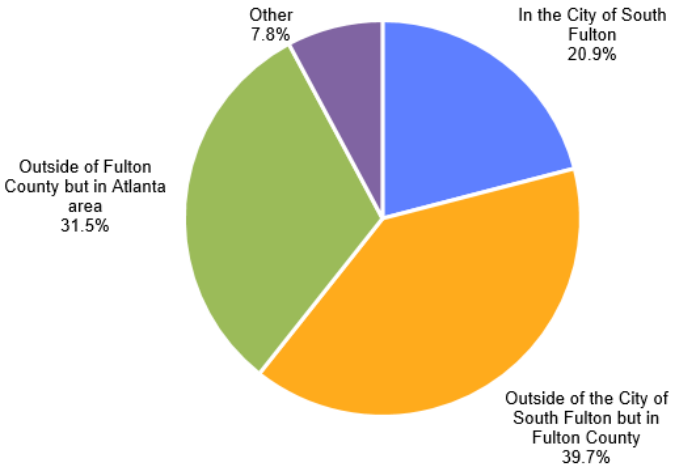
The resident survey was designed and developed with input from city of South Fulton staff and the Steering Committee. The resident survey was administered mid-July to mid-September 2019 and made available online through the city's website and at city-sponsored meetings throughout the period. (The resident survey can be found in the Appendix A-25.)

Resident Survey Results

The resident survey received a total of 664 individual responses. The key demographic data of the residential respondents is as follows:

- 72 percent of the residential respondents work outside the city of South Fulton (See Figure 62).
- 69 percent of the respondents are 45 and older with almost 23 percent 65 or older (See Figure 63)
- 67 percent of the respondents have college degrees and/or post-secondary or professional degrees. (See Figure 64)
- 65 percent of the respondents have annual incomes greater than $75,000. (See Figure 65)
- 55 percent of the respondents have lived in South Fulton for more than 10 years, and another 6 percent are lifelong residents. (See Figure 66)

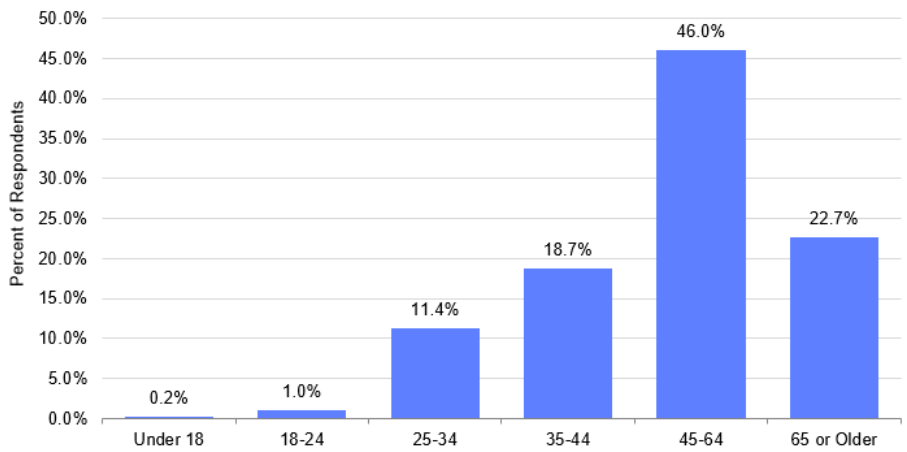
Figure 62: Resident Survey Respondent Workplace



Notes:
Respondents who answered the question = 511
Respondents who skipped the question or for whom it was not applicable = 153

Source: BAE, 2019.

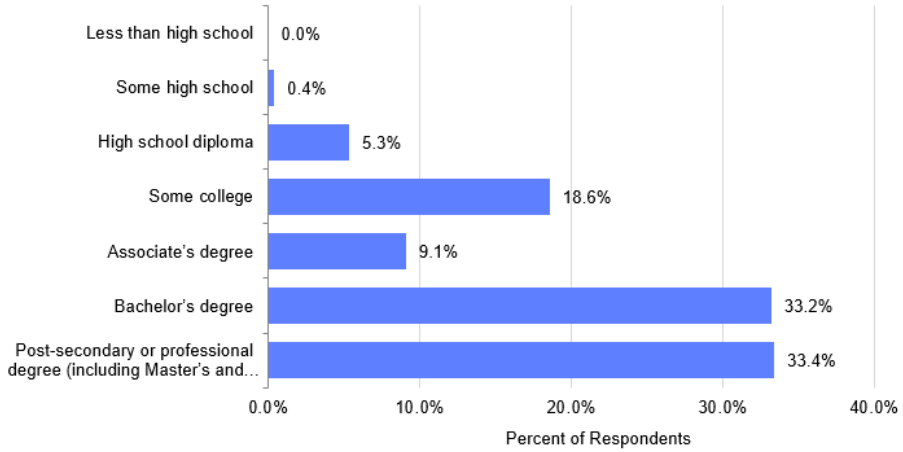
Figure 63: Resident Survey Respondent Age



Notes:
Survey takers who answered the question = 502
Survey takers who skipped the question = 162

Source: BAE, 2019.

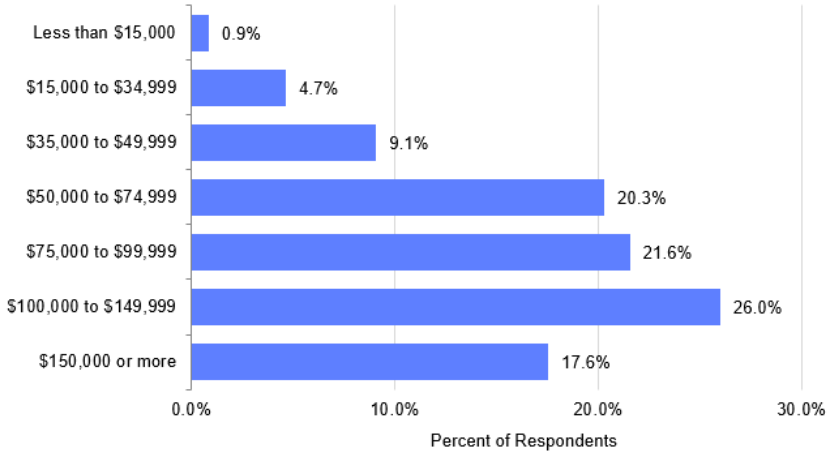
Figure 64: Resident Survey Respondent Educational Level



Notes:
Survey takers who answered the question = 506
Survey takers who skipped the question = 158

Source: BAE, 2019.

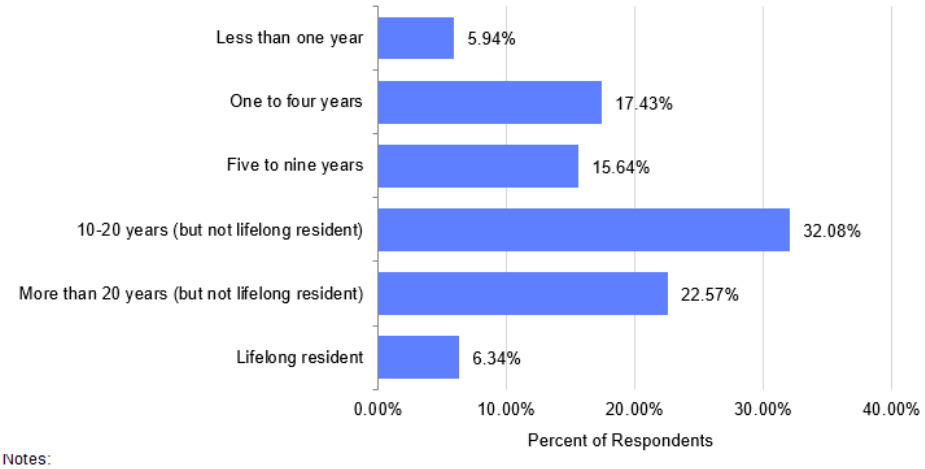
Figure 65: Resident Survey Respondent Annual Income Level



Notes:
Survey takers who answered the question = 473
Survey takers who skipped the question = 191

Source: BAE, 2019.

Figure 66: Resident Survey Respondent Tenure in South Fulton

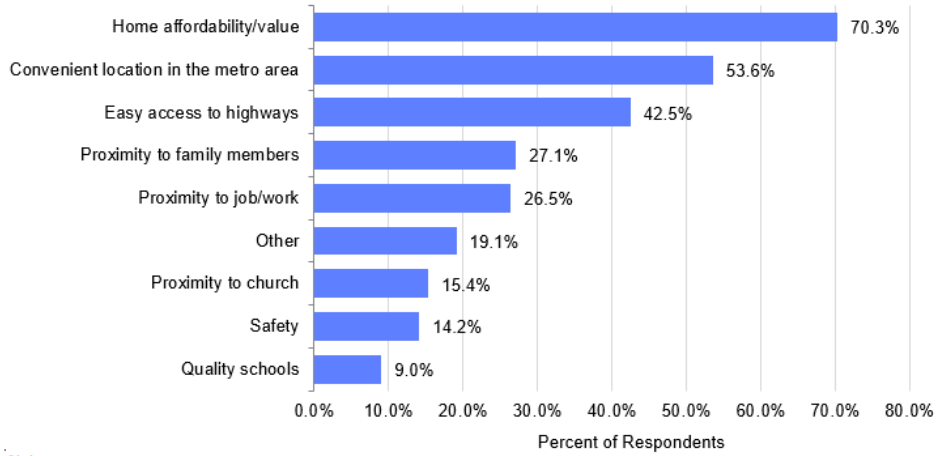


Notes:
Survey takers who answered the question = 505
Survey takers who skipped the question = 159

Source: BAE, 2019.

As shown in Figure 67 the main reason resident respondents cited for living in the city of South Fulton is the affordability and value proposition of its housing.

Figure 67: Resident Survey Respondent Reasons for Living in South Fulton



Notes:
Respondents were instructed to select all responses that apply to them.
Survey takers who answered the question = 586
Survey takers who skipped the question = 78

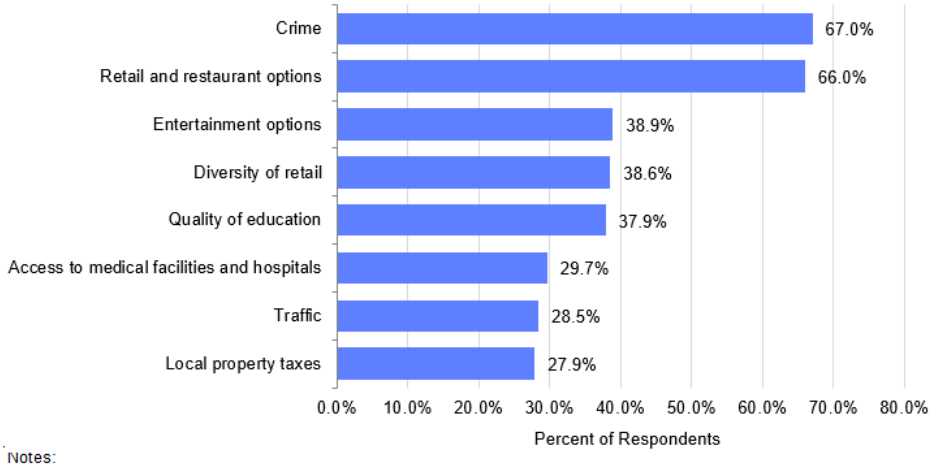
Source: BAE, 2019.

Their top responses for the city's assets among resident respondents are:

1. Location
2. Housing affordability
3. People/Community
4. Green space
5. Potential

As shown in Figure 68, for resident survey respondents crime is perceived to be the most significant challenge for the city, followed closely by lack of retail and restaurant options.

Figure 68: Resident Survey Respondent – South Fulton's Significant Challenges



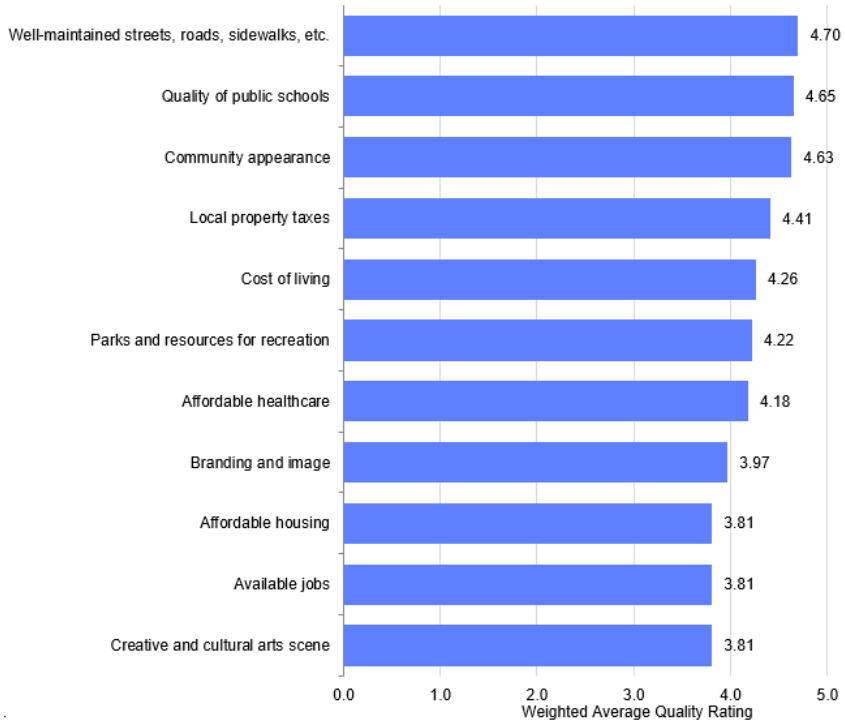
Notes:
Respondents were instructed to select up to three responses that apply to them.
Survey takers who answered the question = 573
Survey takers who skipped the question = 91

Source: BAE, 2019.

As shown in Figure 69, respondents believe that the following factors will contribute to vibrant community and economic growth for a city:

- Well maintained streets, roads, and sidewalks
- High quality public schools
- Good community appearance (overall)
- Lower taxes, cost of living
- Parks and recreation resources

Figure 69: Resident Survey Respondent - Factors Make for a Vibrant, Economically Strong City

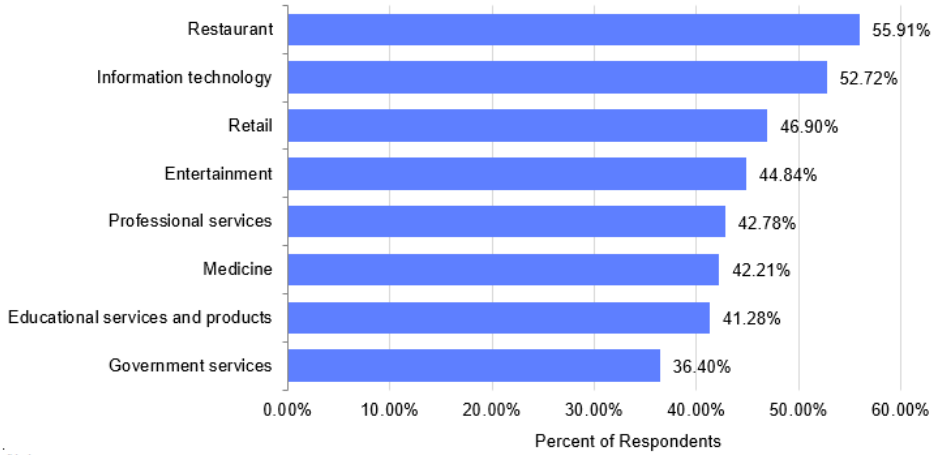


Notes:
Respondents were asked to rate each factor from 1 ("Not Important") to 5 ("Extremely Important"). This figure shows the weighted average of respondents' numerical ratings for each factor.
Survey takers who answered the question = 563
Survey takers who skipped the question = 101

Source: BAE, 2019.

As shown in Figure 70, the most desired employers were Restaurant, Information Technology, and Retail. The choice of restaurant and retail here may be misleading as it is probably more reflective of a strong desire among respondents for more restaurants and retail within the city of South Fulton, than for the jobs associated with them. Many respondents also indicated that medicine and professional services jobs are highly desired.

Figure 70: Resident Survey Respondent - Desired Employers in South Fulton

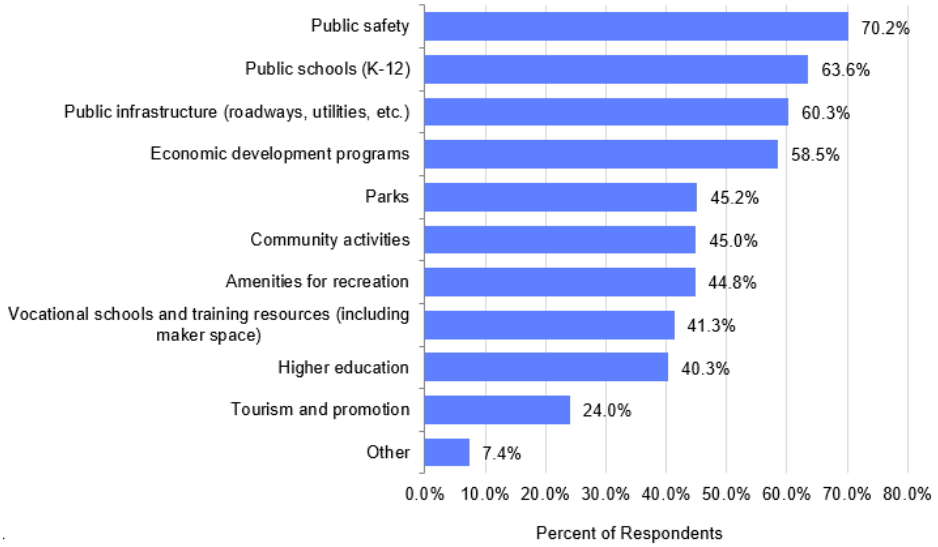


Notes:
Respondents were instructed to select up to five responses that apply to them.
Survey takers who answered the question = 533
Survey takers who skipped the question = 131

Source: BAE, 2019.

In response to a question about what investments the city of South Fulton should be making, the largest number of resident survey respondents chose public safety (See Figure 71). Other areas with a large number of responses include public schools (which are managed by Fulton County), public infrastructure including roadways and utilities, and economic development programs.

Figure 71: Resident Survey Respondent - Suggested Investments for City

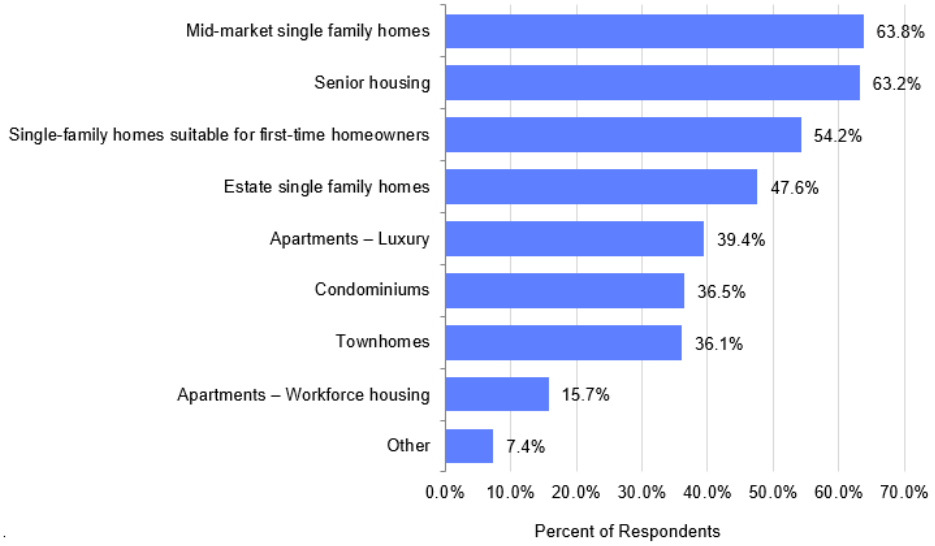


Notes:
Respondents were instructed to select up to five responses that apply to them.
Survey takers who answered the question = 516
Survey takers who skipped the question = 148

Source: BAE, 2019.

As shown in Figure 72, when asked what types of housing is needed, mid-market single-family homes and senior housing top the list for housing needs in the city. The responses to these questions may be influenced by the age of the population sample that responded to the survey. Three of the four top responses are different types of single-family homes, which are more typically occupied by older residents. The other type of housing respondents strongly indicate is needed is senior housing.

Figure 72: Resident Survey Respondent - Housing Needs in South Fulton



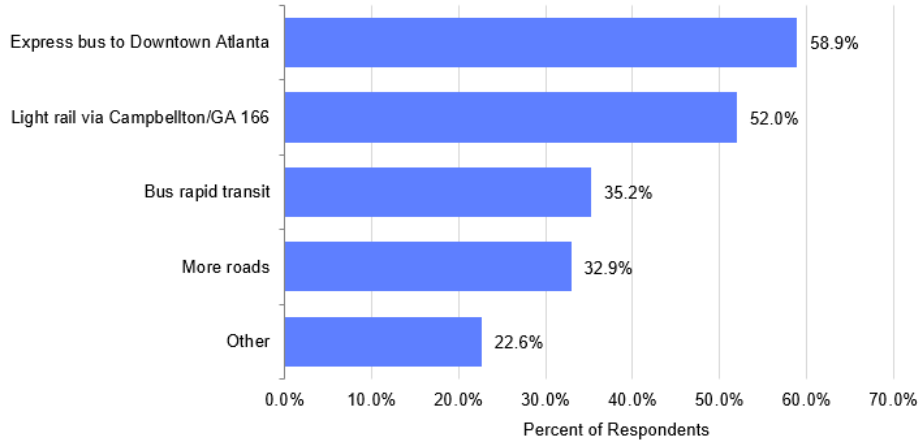
Notes:

Respondents were instructed to select all responses that apply to them.
Survey takers who answered the question = 502
Survey takers who skipped the question = 162

Source: BAE, 2019.

The resident survey included a question about what types of transportation improvement are needed in South Fulton. As shown in Figure 73, express bus service to downtown Atlanta from South Fulton tops the list of desired transportation improvements, followed by light rail via Campbelltown/GA 166.

Figure 73: Resident Survey Respondent - Transportation Improvement Needs



Notes:
Respondents were instructed to select all responses that apply to them.
Survey takers who answered the question = 477
Survey takers who skipped the question = 187

Source: BAE, 2019.

Business Input

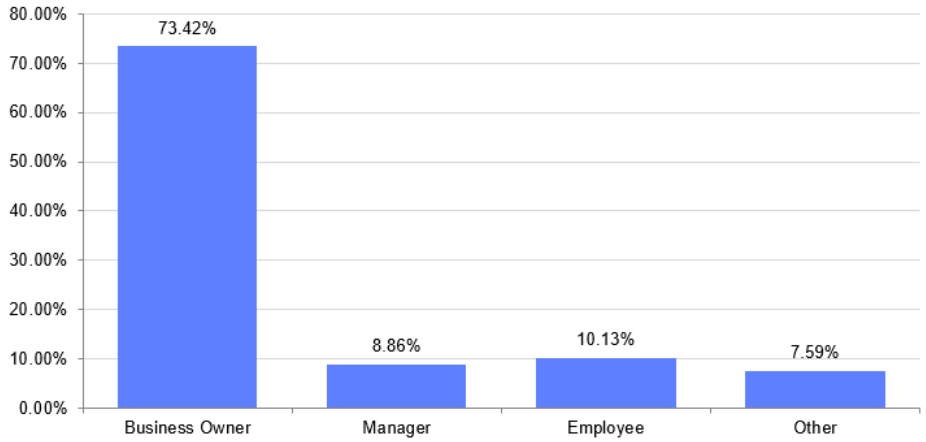
Business input for the economic development strategic plan was gathered through surveys (both a long and short version) as well as interviews with business owners and representatives. A total of 111 business owners or representatives provided input through one of these two methods. Input from these methods is summarized in the sections below.

Business Surveys

The two business surveys administered received a total of 90 responses. The combined responses to the surveys are summarized below.

As shown in Figure 74, more than 74 percent of the respondents are business owners. About 19 percent are either managers or employees of a South Fulton business.

Figure 74: Business Survey Respondents – Number by Role at Company

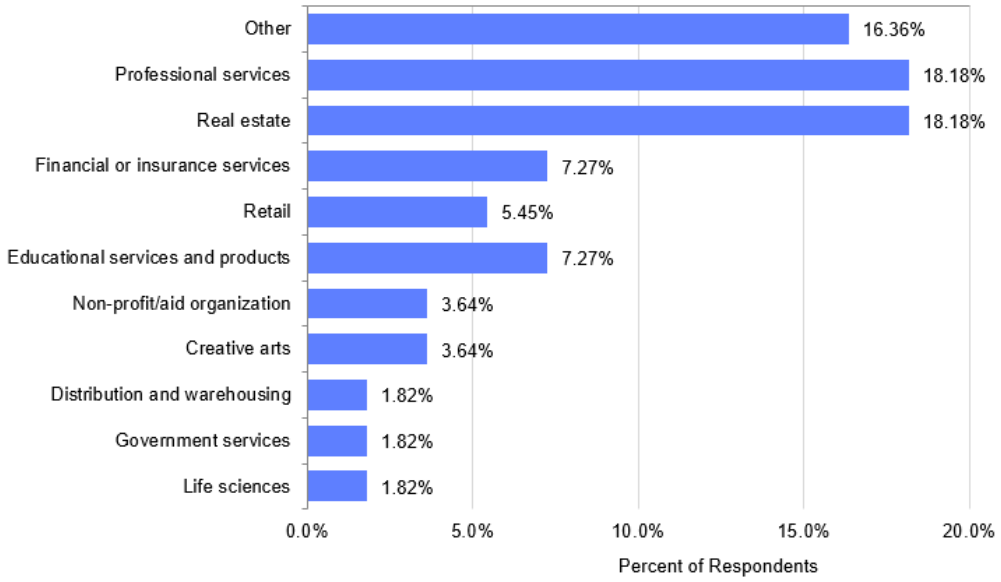


Note: Respondents were instructed to select all responses that apply to them.

Source: BAE, 2019.

As shown as Figure 76 the largest blocks of respondents to the business survey worked in professional services or real estate, more than 36 percent of total. Several respondents checked “other” and other could mean anything from tire recycling to landscape services and agriculture. None of the individual “other” industries totaled up to a meaningful number for survey analysis.

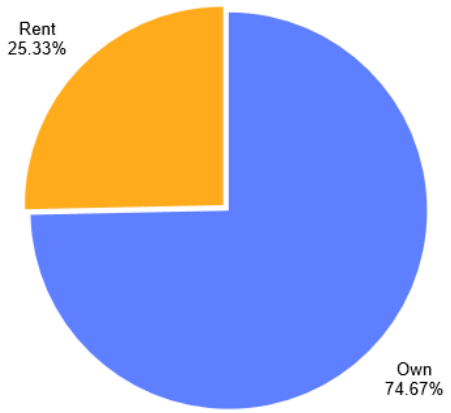
Figure 75: Business Survey Respondents' Primary Industries



Source: BAE, 2019.

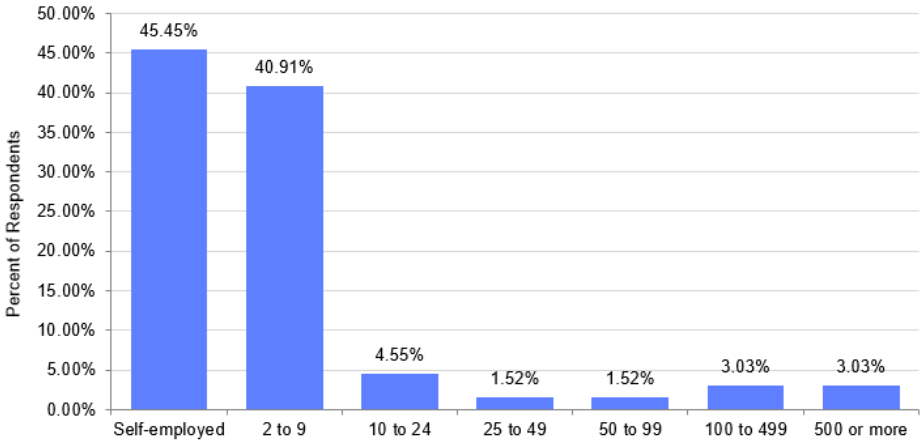
Most of the business survey respondents, nearly 75 percent, own the property where their business is located, as shown in Figure 76 below. This is not surprising given the large percentage of respondents that identify as self-employed, as shown in Figure 77. Of the businesses responding to the survey, most (more than 86 percent) have nine or fewer employees, as shown in Figure 77.

Figure 76: Business Survey Respondents – Rent or Own Business Location?



Source: BAE, 2019.

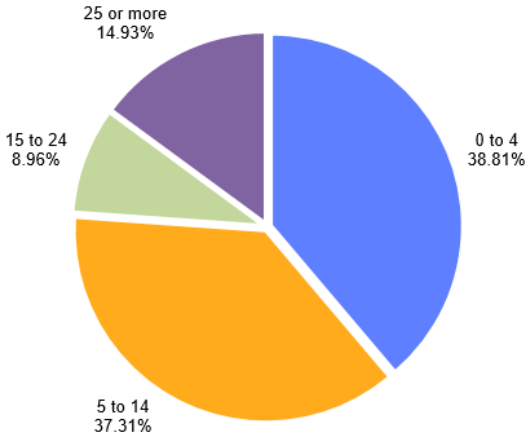
Figure 77: Business Survey Respondents - Number of Workers in the Business



Source: BAE, 2019.

Most of the business survey respondents represent businesses that have operated less than 15 years, as shown in Figure 78. The largest block of survey respondents, 38.8 percent, represented businesses with less than four years of tenure in the city of South Fulton. The next largest block of businesses responding to the survey have operated between five and 14 years.

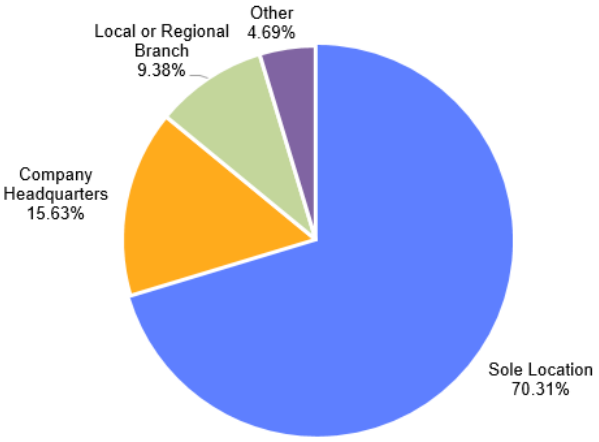
Figure 78: Business Survey Respondents - Number of Years Businesses Has Operated in South Fulton



Source: BAE, 2019.

As shown in Figure 79, most of the business survey respondents represented businesses with just one location, in the City of South Fulton. Another 16 percent of responding businesses had more than one location but called their South Fulton location the company headquarters.

Figure 79: Business Survey Respondents - By Type of Operation in South Fulton

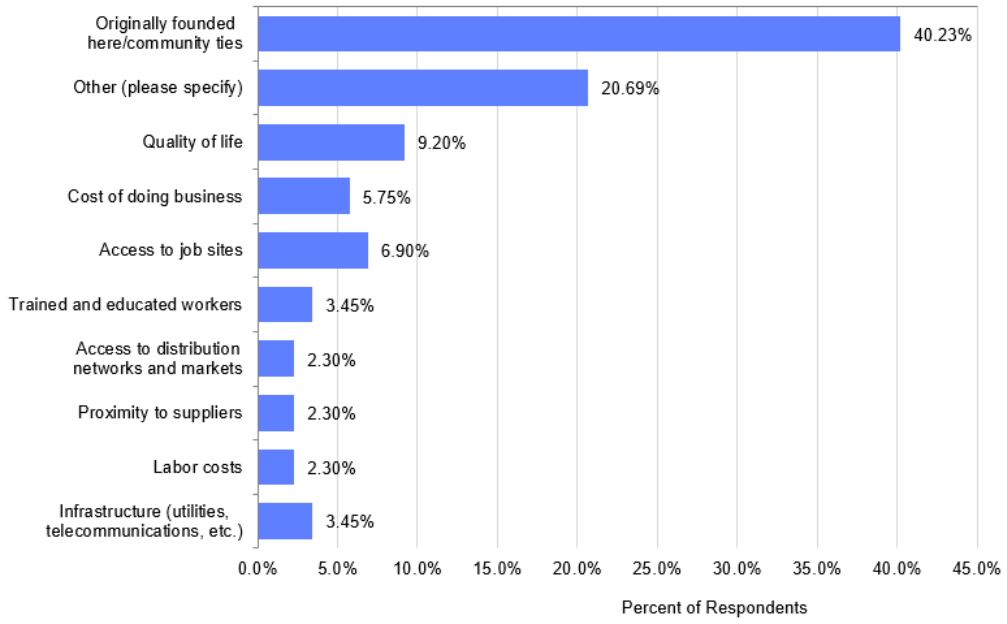


Source: BAE, 2019.

Sho

In reply to a question asking why the business respondents located their business in South Fulton, many (40.2 percent) said that the business was originally founded in the city and/or they had community ties there, as shown in Figure 80. A significant percentage (more than nine percent) cited "quality of life" as the primary reason their businesses are located in South Fulton.

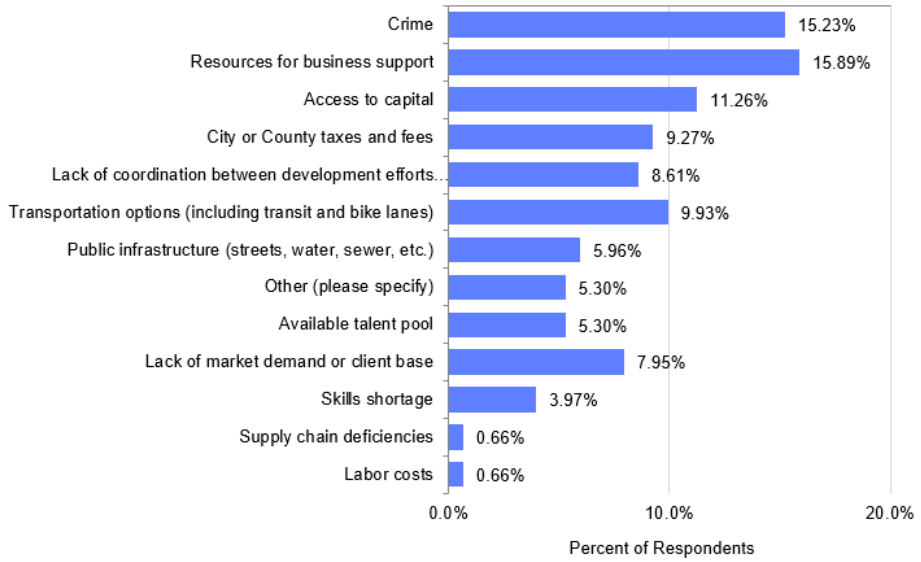
Figure 80: Business Survey Respondents – Why is Business Located in South Fulton?



Note: Respondents were instructed to select all responses that apply to them.
Source: BAE, 2019.

As shown in Figure 81, the responding businesses consider the primary challenges South Fulton businesses face to be 1) resources for business support, 2) crime, and 3) access to capital. Other challenges indicated by a significant number of respondents include limited transportation options and city and county taxes and fees.

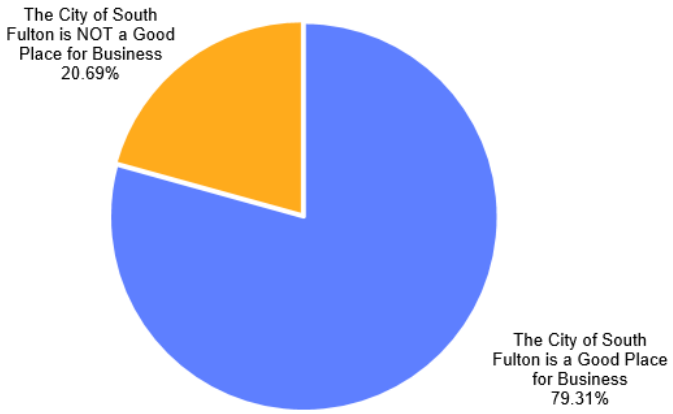
Figure 81: Business Survey Respondents - Primary Challenges Facing Businesses in South Fulton



Note: Respondents were instructed to select all responses that apply to them.
Source: BAE, 2019.

Despite the challenges noted by business survey respondents, most, nearly 80 percent, indicated that the city of South Fulton is a "good place for business," as shown in Figure 82

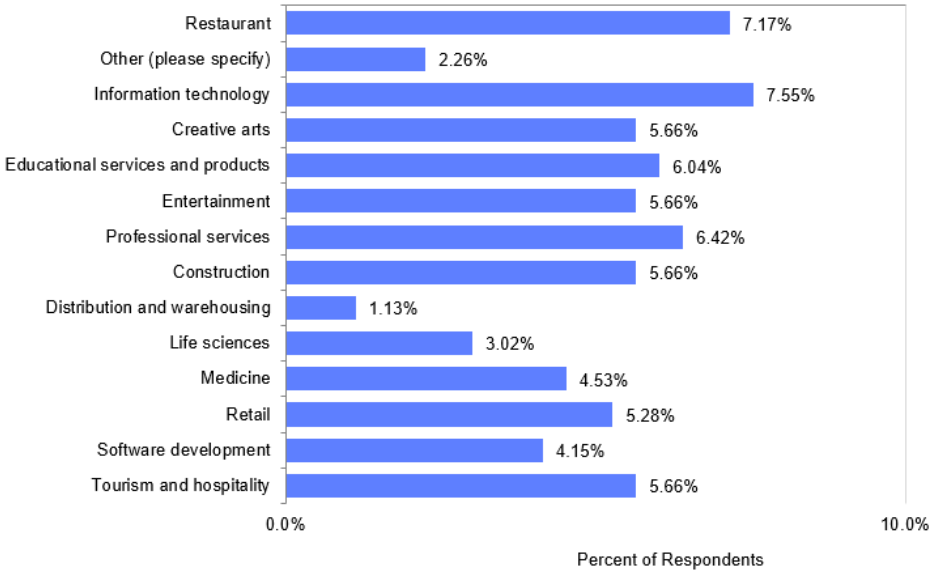
Figure 82: Business Survey Respondents – Is the City of South Fulton is a Good Place for Business?



Source: BAE, 2019.

When asked what types of businesses the city of South Fulton should work to attract, business respondents picked a broad mix of business types, as shown in Figure 83 below. The types of businesses the business survey respondents picked most frequently included information technology, followed by restaurants, professional services, and educational services and products. The reason why restaurants is near the top of the list as most desired by the business respondents is similar to resident survey respondents—that many in the South Fulton community believe there are not enough quality restaurants in the city. The business respondents certainly know that wages in the restaurant industry are not usually family-supporting, but they so much want to see more restaurant options, it affects the response to this question, as it does in the resident survey.

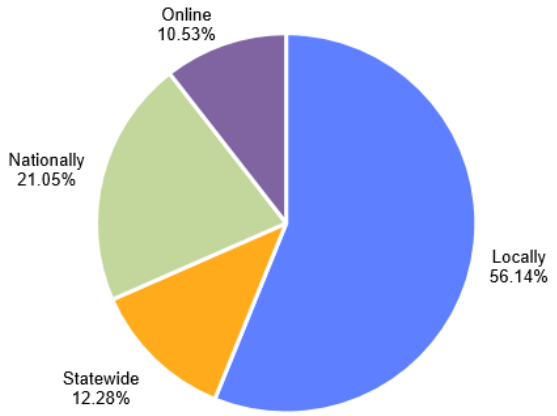
Figure 83: Business Survey Respondents – Business Types the City of South Fulton Should Try to Attract



Note: Respondents were instructed to select all responses that apply to them.
Source: BAE, 2019.

As shown in Figure 84, when asked where most of the responding businesses' business activity occurs, the majority of respondents, more than 56 percent, indicated that most of their business activity occurs locally as opposed to statewide, nationally or online.

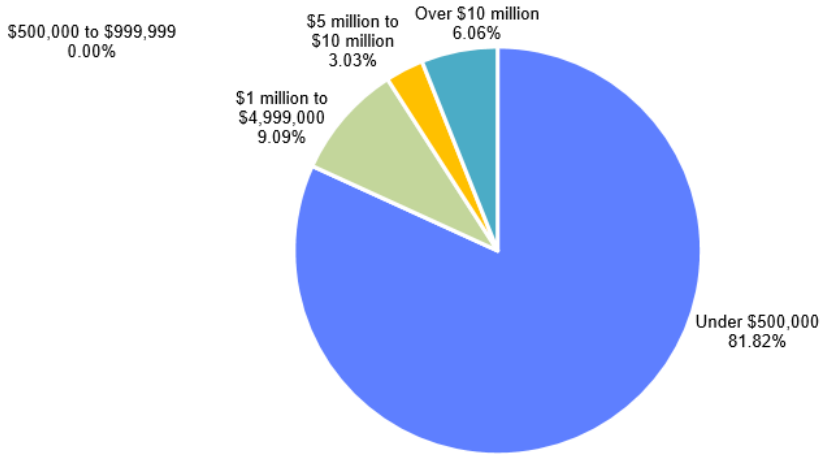
Figure 84: Business Survey Respondents - Where Does Most of Business Activity Occur?



Source: BAE, 2019.

Annual net revenues for most the business survey respondents (nearly 82 percent) are less than $500,000, as shown below in Figure 85 Another nine percent indicate that their annual net revenues are between 1 million and $5 million, with none reporting revenues between $500,000 and $999,999.

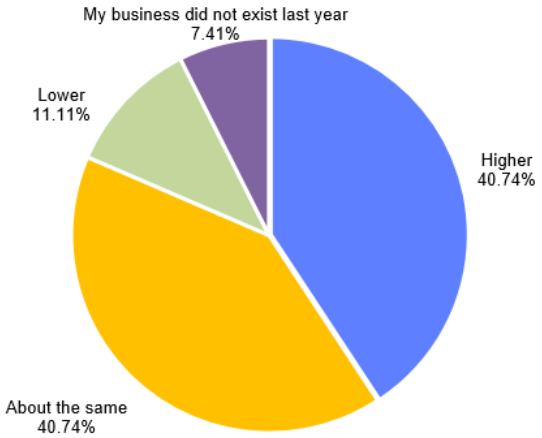
Figure 85: Business Survey Respondents - Approximate Annual Net Revenues



Source: BAE, 2019.

Most of the businesses surveyed have revenues either about the same or higher than their revenues in the past year. As shown in Figure 86, more than 80 percent of business respondents checked either higher revenues than last year or about the same. This is consistent with a generally healthy economy in the Atlanta region and the country as a whole. Just 11 percent indicated that their revenues are lower than they were in the past year.

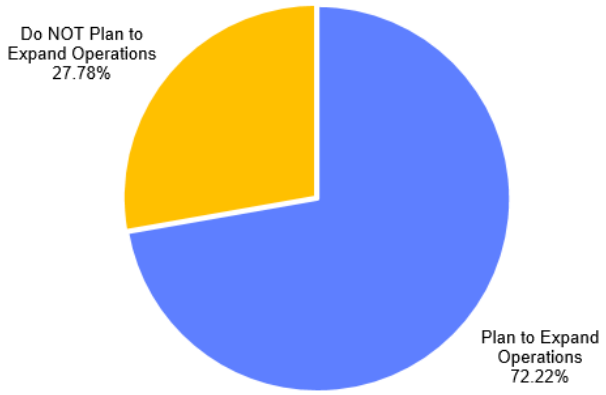
Figure 86: Business Survey Respondents - Revenues This Year Versus Same Time Last Year



Source: BAE, 2019.

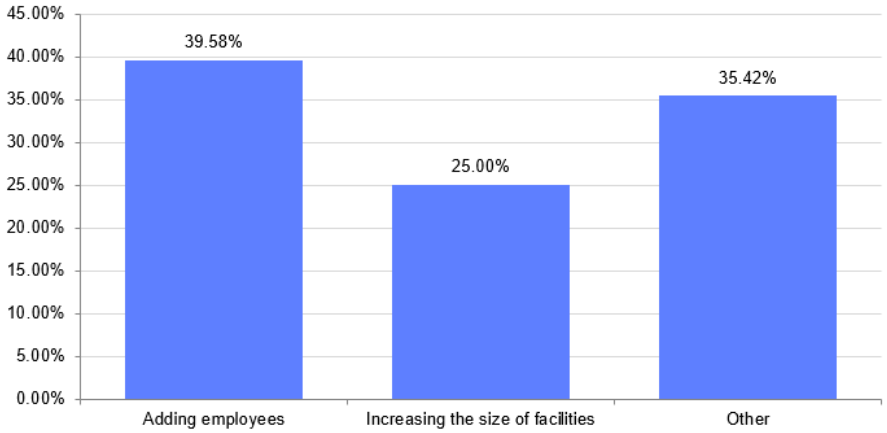
Strong or stable business revenues often result in business expansion and that appears to be a likely direction for the business survey respondents. As shown in Figure 87more than 72 percent of the businesses participating in the survey indicate they plan to expand within the next two years. The business respondents that say they will likely expand indicate that expansion will take place by adding more employees, as shown in Figure 88.

Figure 87: Business Survey Respondents - Business Expansion Plans for the Next Two Years



Source: BAE, 2019.

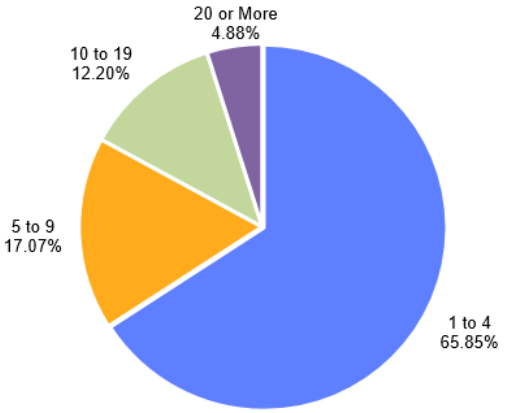
Figure 88: Business Survey Respondents - Business Expansion Plans



Source: BAE, 2019.

Of the businesses that plan to add employees the numbers are fairly modest. Most of the businesses (about 65 percent) would add one to four employees, as shown in Figure 89. Just over 17 percent say they would add five to nine employees.

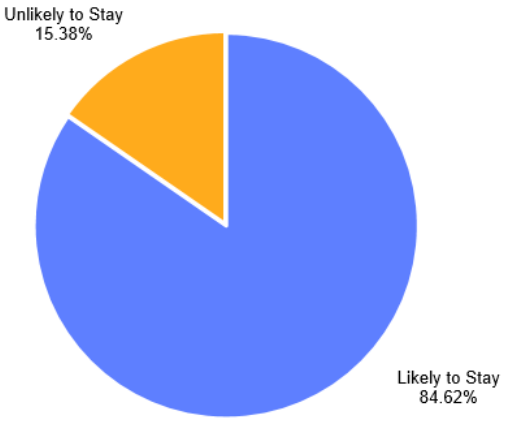
Figure 89: Business Survey Respondents - Number of Employees Respondents Anticipate Adding to Their Businesses



Source: BAE, 2019.

Finally, businesses were asked how likely they are to stay in the city of South Fulton for the next five years. As shown in Figure 90 below, the vast majority of respondents, about 85 percent, indicate they plan to stay where they are, which demonstrates general satisfaction with operating their businesses in South Fulton.

Figure 90: Business Respondents - Likelihood of Staying in the City of South Fulton for the Next Five Years



Source: BAE, 2019.

Business Interviews

As part of the economic development strategic plan process in the time frame of May through November, 27 business owners or representative were interviewed either in-person or by telephone. A summary of some of the key findings from those interviews is provided below.

- Business representatives interviewed most frequently identified the following as top assets or strengths for South Fulton for business:
  - Proximity to airport
  - Access to interstates
  - Convenient location within Atlanta metropolitan area
  - Most undeveloped land in the Atlanta region
  - Strong business organization and Community Improvement Districts (CIDs)
  - Opportunities for redevelopment in certain areas.

- Business representatives interviewed most frequently identified the following as challenges (weaknesses or threats) that need to be addressed to move the city of South Fulton's economic development agenda forward:
  - Roadside trash, debris lack of cleanliness and upkeep of commercial corridors
  - Crime or perception of crime, especially theft
  - Current zoning does not always support business development or growth
  - Uneven code enforcement over the years
  - General beautification of landscaping, right-of-way is needed for CIDs)
  - Lack of regional coordination with neighboring cities, particularly College Park and Union City
  - Lack of restaurants and hotels in the city of South Fulton
  - Lack of a regional transportation and transit strategy
  - Lack of space (i.e., co-working or incubator) and resources for new and growing businesses and entrepreneurs
  - Lack of workforce training programs for some job types (e.g., forklift operators)
  - Vacant or poorly maintained buildings in certain areas.

- Some noteworthy observations from business interviews include the following:
  - Real estate industry representatives note that most of their business activity in South Fulton results from existing business expansion or contraction
  - Real estate industry representatives note that most of the businesses renting or owning commercial real estate are regional companies as opposed to national companies
  - Wide agreement among nearly all business interviewees that logistics, distribution and light manufacturing/assembly are the strongest industry sectors in the city of South Fulton and that more professional services and technology businesses are needed, as well as more restaurants and quality retail, especially grocery stores

- Theft can be a challenge in some retail areas in the city, but businesses and business associations can do a better job preparing for and preventing it.

Focus Groups and SWOT Analysis Sessions

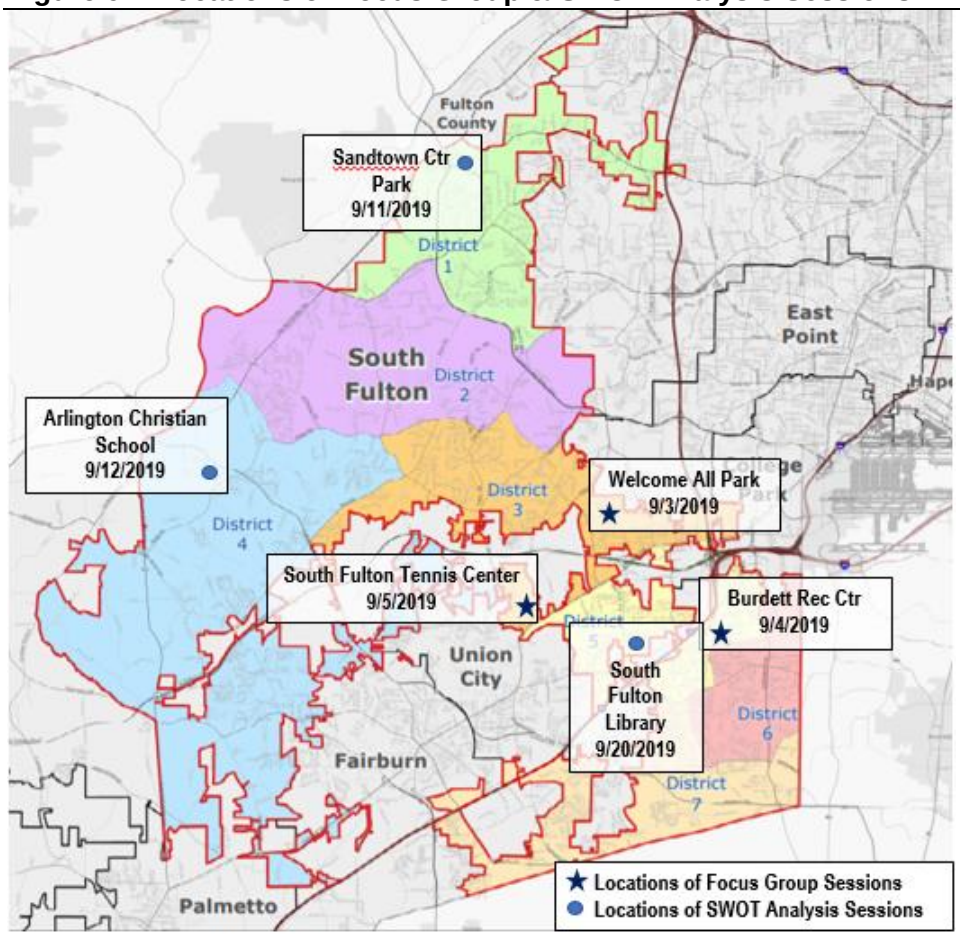
In September 2019, the city of South Fulton hosted six community input sessions to provide opportunities for both residents and businesses to directly weigh in on what is most important to address in the economic development strategic plan. These sessions were open to the public and a notice of the meeting schedule was posted on the city's website and in community newsletters several weeks in advance. In order to maximize participation, the three focus group meetings and the three SWOT Analysis Sessions took place across the geography of the city of South Fulton. A summary of the results of each type of session is provided below.

Focus Groups

Three focus groups were held in the city of South Fulton in September 2019 for the purpose of obtaining community input on the economic development strategic plan. These sessions were attended by both residents and representatives of local businesses. (The location of these sessions is illustrated in Figure 91 below.) The schedule of the focus groups was as follows:

- September 3 – Welcome All Park (27 attendees)
- September 4 – Burdett Community Center (8 attendees)
- September 5 – South Fulton Tennis Center (24 attendees)

Figure 91: Locations of Focus Group & SWOT Analysis Sessions



Source: BAE, 2019

The focus group sessions, led by a member of the consulting team with assistance from city staff, were conducted as open discussions actively encouraging candid input from attendees. Leading questions were developed with the existing conditions assessment and survey results to date. Questions posed to the assembled group included:

1. What are the city of South Fulton's strengths?
2. What are the city of South Fulton's greatest challenges?
3. What type of businesses/employers would you like to see in the city of South Fulton?
4. What types of retail and/or restaurants would you like to see in the city?

The discussion at each focus group meeting varied somewhat by the geographic location of the session but there were some common themes across all. Strengths noted at each of the three focus groups included:

- Good location in the metropolitan area
- Good access to Atlanta Hartsfield International Airport (ATL)
- Affordable homes

- Green spaces and parks (sometimes referred to as “country living in the city”)
- Strong sense of community
- Rich African American culture

Common challenges discussed at the focus groups included:

- Crime
- City appearance
- Not enough retail, especially grocery stores
- Lack of sit-down restaurants
- Too much fast food (especially along Old National)
- Land use/zoning policy
- Too few housing types

In response to the question about what is needed in the city of South Fulton, common themes at each focus group session included:

- More businesses with family-supporting wages
- Hospital or health center
- Sit-down restaurants, both casual and higher end
- More grocery stores
- Pet stores
- Entertainment venues

SWOT Analysis Sessions

After the focus groups sessions were completed, the city hosted three SWOT analysis sessions. The purpose of these sessions was to provide an opportunity for resident and business representative attendees to review strengths, weaknesses, opportunities, and threats (SWOTs) identified thorough the focus groups and survey results to date and prioritize their importance. For each session City staff prepared listings of the primary SWOTs that were noted in the focus groups and in survey responses, posted these to the wall and allowed attendees to “vote” on which were most important in their respective categories. Staff and consultants present at these sessions emphasized there was no right answer on the votes and that the point was to get input from the attendees on what are the most important strengths and opportunities to capitalize on as well as the most critical weaknesses and threats to address. Attendees were also invited to add SWOTs they felt were missing from the lists.

Once the SWOT analysis sessions were complete, the votes were tallied. The results from the compilation are listed below.

Top **strengths** of South Fulton identified:

1. Proximity to airport
2. Home affordability

3. Convenient location
4. Good community/good people
5. Nature, green, country living in the city
6. Good community engagement

Main **weaknesses** of South Fulton identified:

1. Too many warehouses vs. other types of businesses
2. Crime issues
3. Limited access to medical care; no hospital
4. Lack of quality restaurants
5. Lack of diversity of retail
6. Land use policy and zoning

Top **opportunities** for South Fulton identified:

1. New town center-hub
2. Lots of potential for new restaurants
3. Lots of land available for development
4. Farms/farmers market
5. Expansion of entertainment options
6. Home-based businesses, co-working

Main **threats** of South Fulton identified:

1. Crime, perception of crime
2. Quality of schools
3. Trash, debris along roadside
4. Loss/leakage of restaurant and retail business to region
5. Limited public transportation options
6. Limited housing types

Key Findings

The range of comments and responses were consistent between residents and businesses, providing specific guidance as recommendations were developed. Key findings from the community input include:

- Residents and businesses identified the proximity to Hartsfield-Jackson Airport as the main strength of the city, as well its proximity to Atlanta

- The strength of the community and active engagement of residents was also considered an asset to the City

- Residents and business were critical of the number of warehouses in South Fulton, especially compared to the lack of other kinds of businesses

- Crime was a common theme among weaknesses identified by both residents and businesses, in terms of both the physical presence of crime and as a potential threat to the reputation of the city

- The new town center-hub is seen as a top opportunity for the city

- In general, businesses and residents see great potential for new development based on the availability of land

- Restaurants are seen as a particularly viable opportunity for the city, as the city currently lacks the kinds of restaurants residents would like to see and also because of the strength of the farming industry in the city.

ACTION PLAN: RECOMMENDATIONS

The action plan provided below is designed to maximize the city of South Fulton's economic potential allowing the city to be more competitive in the region and beyond. The action plan includes both program and practice recommendations and site-specific recommendations for the Economic Opportunity Focus Areas summarized above. The actions proposed build on the identified strengths and will enable the city to capitalize on opportunities. The plan also addresses the identified weaknesses and lays out strategies to mitigate possible threats. The lead party is identified for each item, as well as other parties that may provide assistance. The suggested timing for implementation is also estimated. Timing is either short-term (within 18 months), or medium-term (18 months to three years), or long-term, (three years and beyond). More specific time frames for the actions are noted when possible.

Program and Practice Recommendations

Expand Marketing and Promotion of the City's Business Assets and Development Potential
From the economic and demographic analysis and the community input from residents and businesses, it is clear that the city of South Fulton has many notable strengths and opportunities ranging from its convenient location near the world's busiest airport and major highways to affordable quality homes to ample land available for development and redevelopment. As a young city, just incorporated in 2017, many are still unaware of what South Fulton has to offer. Suggested specific actions to broaden awareness of community's strengths and potential include:

1. **Conduct a focused marketing campaign to introduce the city of South Fulton to the region and beyond.**
   Party: Department of Economic Development with guidance from marketing specialists, as well as the Office of Communications and External Affairs.
   Timing: Immediate short-term blitz of positive messaging and ongoing frequent updates highlighting accomplishments.

   The city should consider developing messaging about the adoption of the Economic Development Strategic Plan, the establishment of National Main Street Programs and generally providing updates and announcements of new economic development programs and initiatives and new development projects. Messaging can be executed via the city's website, social media (i.e., Facebook, Twitter), email blasts, links from the South Fulton Chamber of Commerce, Aerotropolis Atlanta CIDs, other associations/organizations' websites, radio or local television spots (features not ads when possible), and in print.

2. **Perform direct outreach at business association meetings, events, receptions, etc.**
   Party: Director of the Department of Economic Development, and staff.
   Timing: Immediate and ongoing.

   The Department of Economic Development must continue to participate in as many Chamber of Commerce and other business association meetings and events (including ones involving businesses associated with the airport) as possible. It is best to get on the agenda to present updates, especially good news, directly.

3. **Host business networking events with time for short presentations about new economic development initiatives and programs.**
   Party: The City of South Fulton - Department of Economic Development as lead agency.
   Timing: Short-term, immediate and ongoing.

   These could be one off business networking events, such as the Business Showcase held in September at the South Fulton Tennis Center, or a series of networking events sponsored by the City. Ideally, these would be either breakfast or early evening events to maximize attendance.

Create or Expand the City's Economic Development Tools, Programs, and Resources to Enable South Fulton To Be More Competitive in the Region

Since its incorporation in 2017, the city of South Fulton has made considerable progress in establishing programs and tools to incentivize new and expanding businesses to locate in South Fulton. New tools or programs added since South Fulton incorporated as a city include the Freeport Tax Exemption (approved by voters in November 2018) and establishment of the South Fulton Development Authority (adopted by resolution in November 2018). Other suggested changes include:

1. **Establish a Tax Allocation District (TAD) to provide a stream of funding for new development or redevelopment within the designated district.**
   Party: Department of Economic Development, City Council
   Timing: Short-term, within 18 months.

   South Fulton has the authority to establish a Tax Allocation District (TAD) on up to 10 percent of its tax digest. TADs can provide a stream of funding backed by future property revenues, meaning it is a potentially powerful and useful tool to enable development or redevelopment in the Economic Opportunity Focus Areas described above. Potentially, two TADs could be adopted in South Fulton to cover different geographies up to 10 percent limit as noted.

2. **Implement Main Street Programs for Red Oak and Old National.**
   Party: Department of Economic Development with coordination from the Georgia Main Street Program
   Timing: Short-term, immediate within three to four months and ongoing effort

   The City of South Fulton has received a notice of inclusion in the Main Street program for the Red Oak Historic District and Old National. The programs, which will be led by Main Street Managers to be hired, will help revitalize the corridor and assist businesses along the corridors. The Main Street "Transformation Strategies" stress economic vitality, design, promotion and organization to revitalize historic downtowns and commercial districts.

3. **Create an online site location portal.**
   Party: Department of Economic Development in coordination with local real estate brokers and developers.
   Timing: Short- to medium-term, within two years.

   An online site location portal can provide information about available commercial buildings for sale or rent, space for rent, as well as vacant land suitable for commercial use. This portal should be easy to access and use and serve as a tool for economic developers and new and/or expanding businesses.

4. **Establish expedited permitting for economic development projects.**
   Party: City of South Fulton, Department of Economic Development and Permitting Center
   Timing: Short-term and ongoing

   The city of South Fulton should institute expediting permitting for economic development that will result in net new jobs and/or new capital investment in the city. Each economic development project will be assigned an ombudsman from the Office of Economic Development to help navigate the permitting process as necessary. The ombudsman can be a point of contact who can help address questions and concerns as the project progresses.

5. **Develop limited small business financing programs.**
   Party: Department of Economic Development and South Fulton Economic Development Authority.
   Timing: Medium- to long-term, likely in three plus years

   As the South Fulton economic development program matures, it may prove helpful to enable small business financing directly or via the U.S. Small Business Administration lending programs. This could include façade financing programs in the Main Street

areas or other small financing programs. Such funding could serve as a match for any state financing programs as this is sometimes needed or requested.

Prime Existing Businesses in South Fulton for Growth and Expansion

Economic developers know that most business growth comes from existing businesses rather than the high-profile corporate relocations that grab the headlines. It is important for economic developers to establish strong relationships with existing businesses in the community and stay on the pulse of particular industry trends and markets and any issues or concerns about current locations.

1. Initiate a regular business visit program
   Party: The Department of Economic Development with involvement of city administration on occasion.
   Timing: Short-term, immediate, and ongoing

   The city, led by economic staff development, should institute a regular business visit program. Ideally, this should include at least six to eight business visits each month. For larger businesses, those with 50 or more employees, the City Manager or Mayor could also participate in the meeting. This will reinforce the importance of the business to South Fulton. It is important to get a sense of how the business is doing and if they are satisfied where they are or have concerns that might lead them to leave a location. These visits also provide the opportunity for staff to discuss tools, programs, and resources available to the businesses.

2. Fully implement business support programs at the Small Business Resource Center
   Party: Department of Economic Development, in conjunction with the Small Business Development Center (SBDC)
   Timing: Short-term and ongoing

   The city is in the process of implementing a business assistance program at the soon to be established Small Business Resource Center. The center will also provide support services to small businesses and entrepreneurs. It can be an auxiliary setting for business counseling and programs provided by the local SBDC (a program of SBA) and SCORE, a 501 (c) 3 non-profit organization (also a resource partner of SBA) with a network of business mentors. The regional SBDC is based in Atlanta at Georgia State University but routinely provides counseling and education sessions at auxiliary locations in the metro area. There is a SCORE chapter in nearby College Park and like SBDC, SCORE volunteers will provide counseling and conduct workshops at other locations to meet the needs of the community.

Strengthen Partnerships Between the City of South Fulton and the Business Community to Augment Economic Development Effort and Address Community Issues

By all indications, many businesses and business organization are strong supporters of the city of South Fulton and the effort to grow the local economy. Through the planning process for the economic development strategic plan, especially during the community input period, several business and business organization representatives came forward offering to help advance the city's economic development program. In addition, there are ways that businesses and business organizations can assist the city with addressing issues and concerns (the weaknesses and threats identified in the SWOT process) including crime and trash/cleanliness. Left unaddressed, crime and trash concerns could impede economic development momentum in the city.

1. **Create a business ambassador program.**
   Party: Department of Economic Development with business/community improvement organizations including the chamber and CIDs
   Timing: Short-term and ongoing

   Enlist business and business association representatives who support the mission of the Department of Economic Development to be available to help with business prospects potentially interested in relocating or expanding operations in the city of South Fulton. The business ambassadors would be available "on call" to reinforce the assets and strengths of the city to prospective businesses. Some of the business ambassadors could provide special insight and guidance to businesses that are in similar industry sectors, such as certain professional services, technology businesses, or manufacturers. The business ambassadors could be representatives of large businesses, such as Georgia Power or Miller Zell, or small businesses of various types or representatives of the business organizations and CIDs.

2. **Host a business appreciation week**
   Party: Department of Economic Development in lead with other city agencies participating, as well as business ambassadors
   Timing: Short-term, hold first business appreciation week within 18 months and annually thereafter

   The Department of Economic Development should lead a three to four day focused calling initiative on existing businesses in the city of South Fulton annually starting last quarter 2020 or first quarter 2021. This would involve the Office of Economic Development as team leaders with team members from other city agencies as well as the business ambassadors to visit businesses of all sizes to briefly present the city's programs, tools and resources available to businesses and ask if the business has any questions or concerns. The teams all together will call on eight to 10 businesses each day of the business appreciation week. The team leader would need to provide follow-

up to any questions or concerns from business owners. Business appreciation week has been used successfully to establish and/or strengthen relationships between business and government in cities and counties across the country.

3. **Form partnerships between local business organizations and CIDs and the city of South Fulton's Police Department to help address concerns with crime in neighborhoods and commercial areas.**
   Party: City of South Fulton, Department of Economic Development working in close conjunction with the Police Department and business organizations.
   Timing: Short-term and ongoing

   The South Fulton Police Department is working hard to reduce crime in all parts of the city. Working with Georgia Tech, the Police Department is in the process of redesigning police beats to better balance police workload among different zones in the city of South Fulton according to population and economic growth. The police beats have not been updated since the 1970s. Recalibration of beats and an increase in the number of police officers will help to balance the workload and ultimately reduce crime. Businesses and business organizations should vocally support these measures and work with the Police Department to form local business-police partnerships to get businesses and property owners to be proactive in taking measures to prevent and reduce crimes, especially opportunity crimes, like theft. These partnerships have worked well in other cities, and the city does plan to have an officer who is responsible for coordinating these business-police partnerships.

4. **Form partnerships with the city and local business organizations and CIDs to address trash and cleanliness issues along commercial corridors.**
   Party: Department of Economic Development in conjunction with the Department of Public Works with business organizations and CIDs.
   Timing: Short-term and ongoing

   The appearance and cleanliness of any city, especially the commercial corridors, may deter businesses from locating or investing there. Accordingly, there needs to be a special effort in the city of South Fulton to reduce trash and debris, especially in business districts. Though the Department of Public Works is not charged with removing commercial trash, it can assist business organizations with setting up regular voluntary clean-ups (e.g., two to three times per year) in commercial areas and may be able to help provide supplies and follow-up services on a limited basis.

Work to Attract More Technology Business, Professional Services and Other High Value Industries

While the city of South Fulton and surrounding cities have a significant amount of wholesale trade businesses and jobs—11 percent of the city's jobs are in this sector— it needs to attract more high value industries, including technology or more professional services businesses, for long term sustainability of the local economy. The city needs to more proactively go after these types of businesses, in conjunction with the Georgia Office of Economic Development.

1. **Participate in programs of local and state technology councils to keep abreast of technology trends in the area and network with technology company principals.**
   Party: Department of Economic Development staff
   Timing: Short-term and ongoing

   Attend and participate in workshops, meet-ups, receptions and other events sponsored by local and state technology councils including the Technology Association of Georgia and the Technology Leadership Council (part of Metro Atlanta Chamber) and other local technology groups. By participating in such meetings, staff will stay informed of technology trends in the region and be able to network with the regional tech community to promote the city of South Fulton as a business location.

2. **Participate in joint marketing and business development efforts led by the Georgia Department of Economic Development to attract technology and other businesses.**
   Party: Department of Economic Development with the Georgia Office of Economic Development
   Timing: Short-term and ongoing

   The Georgia Department of Economic Development engages in marketing and business development efforts nationally and internationally. The state agency provides opportunities for local economic development agencies to participate in these endeavors. This could include participating in local and national trade shows and business organization conferences as an exhibitor as well a chapter and national meetings of real estate site selector organizations, e.g., CoreNet. It is best to work with the state and regional partners to share costs of this type of activity.

Make Special Effort to Attract Restaurants and Retail Offerings in the City of South Fulton

In the community input sessions, both residents and businesses strongly voiced a need for more restaurants, particularly sit down restaurants, as well as more quality retail and entertainment offerings. While the jobs associated with these types of businesses do not typically have high wages, having more and better restaurants, retail and entertainment has the potential to improve quality of life for residents and be a positive for businesses, too. While there are measures that can be taken to attract more of these types of businesses, it should be noted that decisions to locate stores and restaurants are often driven by population

density, and there are many parts of South Fulton that are not densely populated. With that in mind, suggested actions include:

1. **Take advantage of Main Street marketing and promotion efforts to attract restaurants and retail to the Red Oak Historic District and Old National Districts.**
   Party: Department of Economic Development and Georgia Main Street
   Timing: Short-term and ongoing
   The Main Street model already includes a business development approach to attracting retail and restaurants, as these are typically located on Main Street commercial areas. The Department of Economic Development can take full advantage of the Main Street toolbox and review and adopt best practices in this area from other Main Streets in Georgia and other parts of the country.

2. **Once plans for significant residential expansion in a given area are approved and population density is set to increase, the city should prepare and deliver pitches to certain retailers (primarily grocers) and restaurants known to be expanding to promote the city of South Fulton as a location.**
   Party: Department of Economic Development, possibly in conjunction with mixed-use project developers
   Timing: Short- to medium-term, as needed, and appropriate.
   There are a number of potential mixed-use developments proposed in South Fulton in the short- to long-term. As these new developments are approved, economic development staff should prepare and present demographic and economic information, including population projections about the areas, to decisionmakers for new retail and restaurant locations. This type of presentation can be made in a small meeting with one or two decisionmakers or before a group of restaurateurs or retailers at a special forum. This type of pitch has worked well in successfully attracting both grocery stores and restaurants in other cities in the United States, including locations in Prince George's County and Baltimore in Maryland.

Work to Build Convention and Visitor Business in the City of South Fulton

With its location so close to the Hartsfield-Jackson Atlanta International Airport, the city of South Fulton has potential to develop much more tourism industry, whether it is for convention, meeting, trade show or sports tournament business or to tourists visiting area attractions. In October 2019, the South Fulton Convention and Visitors Bureau was created by resolution to lead the efforts to attract more visitors. The Department of Economic Development should aid in this effort as tourism business helps to diversify and make the local economy more resilient. Suggested actions that could help build tourism and visitor business include:

1. **Attract a hotel from well-known hospitality group (e.g., Marriott, Hilton, IHG, etc.) to the city of South Fulton.**

Party: Department of Economic Development, working with South Fulton Convention and Visitors Bureau
Timing: Medium- to long-term

Having a hotel with meeting space in South Fulton would help to build more tourism business into the local economy. Additionally, in the business interviews, several business representatives of national companies cited the need for a hotel closer to their operations for company visitors. As with the restaurant and retail attraction strategy above, the Department of Economic Development could work with the CVB to make the case for a new hotel in South Fulton with data, and pitch that to the hotel groups. The demand potential will be clearer once new mixed-use developments are announced and approved, so this action will likely not be needed until the medium-term, in two or more years. There is currently a Fairfield Inn & Suites, of the Marriott Group, on Senoia Road, near I-85, and there are two more hotels planned for that area. Fairburn Hospitality will manage and operate the new hotels, which will represent a necessary increase in quality lodging, and jobs. Nevertheless, demand for more lodging throughout the City arising from the planned mixed-use developments must be an important consideration for the city.

2. **Help to develop African-American tourism in the city of South Fulton.**
   Party: CVB as lead with Department of Economic Development support
   Timing: Start in the short-term and continue to help build more attractions and visitors over the long-term

   African- American tourism is growing in popularity across the country. The recently opened National Museum of African American History and Culture in Washington DC, the Harriett Tubman Museum and Educational Center in Maryland (managed by the National Park Service) and new Civil Rights museums in Birmingham, Alabama, Jackson, Mississippi and Memphis, Tennessee have all attracted thousands of visitors, to say nothing of the long-established Martin Luther King, Jr. National Historical Park in Atlanta. South Fulton is home to several African-American Civil Rights leaders including Congressman John Lewis, as well as many other leading African-American entertainment and sports figures. There is great potential to leverage this rich history and develop an African-American attraction or heritage trail in South Fulton and the opportunity to link any attractions to heritage sites in Atlanta. Economic Development can assist the CVB in making the case for new investment in such an attraction which will contribute to local tourism industry and the economy.

Expand the City of South Fulton's Economic Development Organization

With the addition of Main Street designated areas and several new programs and initiatives it will be necessary to expand the staff of the Department of Economic Development

incrementally over time. Suggested additions to staff and their respective duties are outlined below.

1. **Add one staff person each to serve as Main Street Manager for Red Oak and Old National Main Street districts (two total).**
   Party: City of South Fulton for the Department of Economic Development
   Timing: Short-term, immediate (Spring 2020) to coincide with timing of Main Street program establishment

2. **Add one staff person to serve as coordinator for Small Business Resource Center and to provide general assistance with the city's economic development program overall.**
   Party: City of South Fulton for the Department of Economic Development
   Timing: Short-term, immediate (Spring 2020) to coincide with opening of the Small Business Resource Center

3. **Add one staff person to focus on marketing, communications, and research in support of South Fulton's economic development program.**
   Party: City of South Fulton for Department of Economic Development
   Timing: Medium-term, 18 months to two years

   As the Department of Economic Development expands its offerings, it will become necessary to have a staff person responsible for creating marketing materials, preparing presentations, and conducting market research for business prospects. This person would maintain and manage data from multiple sources (i.e., U.S. Census, Esri, Bureau of Labor Statistics, Georgia Department of Labor, etc.). This staff person should be capable of responding to requests for information from prospects, site location consultants, the Georgia Department of Economic Development, and other agencies.

Site Specific Recommendations

Below are site specific recommendations, primarily for the Economic Opportunity Focus Areas described earlier in this report. The timing for these recommendations ranges from short-term to long-term, seven or more years. The potential uses listed in these recommendations are a range of reasonable possibilities given the size and location of the site as well as broad market indicators. In all cases, establishment of a Tax Allocation District (TAD) would greatly increase the odds of development or redevelopment of the Economic Opportunity Focus Areas. As these site specific recommendations are being made, the zoning rewrite now underway will attempt to factor in the possible uses described below to the extent possible in the zoning recommendations that are also being put forward in January 2020.

Start-up New Main Street Program for Red Oak Historic District
The city of South Fulton has been notified of the designation of a Main Street area along the Red Oak Historic District. (See Figure 52 for map of the area.) Steps to be taken include:

1. Hire Main Street Manager for district in Spring 2020
2. Implement Main Street Program after Main Street Manager in place

Start-up New Main Street Program for Old National Highway
The city of South Fulton has been notified of the designation of a Main Street area along Old National Highway in the city. (See Figures 56, 57, and 58 for the three parts of Old National Highway that make the new Main Street.) Steps to be taken include:

1. Hire Main Street Manager for district (all three parts of Old National as described in Economic Opportunities Focus Area section of this report) in Spring 2020
2. Implement Main Street program after Main Street Manager is in place

Plan for New Town Center - Camp Creek Parkway and Enon Road
The city of South Fulton needs to site a permanent city hall within the city limits of South Fulton. The city wishes to make the government offices part of a town center with mixed uses potentially including residential (medium-high density), restaurants, retail, office, and possibly a hotel and conference center. The town center could also include public space suitable for concerts and a farmers market. After reviewing a number of sites for the town center, a 400-acre parcel located along Camp Creek Parkway and Enon Road, that lies in both Council District 2 and District 4, would be the most suitable location for the town center.

This site already has excellent access from Camp Creek Parkway and is reasonably conveniently located to most parts of the city of South Fulton. Additionally, the Wolf Creek Amphitheater is adjacent to the site and there could logically be a link between the two properties. It also features a water amenity, Vandiver Lake, that could be a focal point for the town center.

The Town Center would be a public-private partnership, also known as a P3, that could take five plus years to fully implement. The city would be well advised to bring on an expert in putting together development agreements between government and the private sector for P3s before proceeding. Such an advisor could work to guide the city from start to finish in the planning process. Steps toward implementing the P3 may include, though not be limited to the following:

1. Perform a site assessment on the property to make sure the site can be developed into the range and full list of uses noted above. This will include evaluating soils, and

an environmental assessment and other factors. This assessment could be carried out within six to nine months

2. If the site is deemed suitable for the development plan, the City should prepare a market analysis, evaluating alternative development scenarios for the Town Center site from the broad list above to understand better what mix of uses would be most likely to be supported in the market and also meet the desire of the city to establish a new government office center. This analysis could be performed within one year, if not sooner.

3. At this juncture, if all are in agreement that the site offers the potential to accommodate the town center, the city should gain site control, whether that is purchasing or optioning the property. The guidance of a P3 expert would be critical here.

4. Conduct developer workshops that would include detailed, up-close tours of the site, and a review of market analysis findings (item #2 above). These workshops will be invite only for developers, focused on those developers who have successfully completed projects of the scale proposed for the South Fulton Town Center. The workshops would be held over multiple days, perhaps two or three days, depending on level of interest from developers.

5. Issue an RFP for development proposals from developers. The responses should include detailed site plans with all components as well as a phasing schedule. The developer must be able to demonstrate that the proposed town center plan is financially feasible. The P3 advisor is key here—he or she can help prepare a solid RFP that covers key requirements.

6. Once the city selects a developer for the project, the city must negotiate terms of the public-private development. This would include terms of the agreement from ownership structure (i.e., whether the city owns property, whether there will be a ground lease, etc.) to schedule. At this juncture there should also be a decision on the organizational structure of the development entity, whether led by city, by developer or by a newly established development entity. Again, the P3 advisor is key here to get the best possible terms for the city and ensure that the plan is workable.

7. Once all agreements are executed, work can begin on the town center. It is estimated that all phases of the project would take five to seven years to complete, with parts of it complete within three or four years, depending on length of time the city takes to perform the steps in-between.

Plan for Sandtown Crossing Development

This city should support the entire development of Sandtown Crossing (see Figure 51) to the extent possible and appropriate. The city's role would most likely focus on development of the 85-acre passive park and that would involve the Department of Parks and Recreation and the administration. The Department of Economic Development can help to advocate for additional development beyond the Sandtown Crossing Shopping and the senior citizen development under construction now. That potentially includes townhouses and additional commercial development (i.e., retail and restaurants). The entire Sandtown Crossing Plan should be complete in the medium- to long-term, likely three to five years.

Plan for River Front District

The River Front District (Figure 53) development is farther along than Sandtown Crossing in its full implementation. A developer recently closed on the purchase of the 200-acre site and has plans to build a high-density mixed-use development that features walkable blocks and streets with shopping, restaurants, and residences, and public spaces and public access to the Chattahoochee River. The city will need to support the developer through the planning process and expedite project approval and permits once a feasible site plan is prepared. There are roles for the Department of Economic Development, Community Development and Regulatory Affairs and the administration in guiding this project through the process. The River Front District development should be complete in the medium term, within two to three years.

Plan for Old National Commons

Old National Commons is one of three Economic Opportunity Focus Areas along Old National Highway. (See Figure 56.) It is part of the newly designated Old National Main Street area. The area includes two apartment complexes in need of rehabilitation, commercial areas in need of revitalization, and vacant land suitable for infill development. The Main Street program will aid in encouraging the revitalization of the retail area. The Department of Economic Development needs to attract developers for these projects. This could start with the preparation of a market potential assessment in the short-term. However, the rehabilitation and redevelopment of Old National Commons will be complete in the long-term, three to seven years.

Plan for Old National Park

Old National Park, as shown in Figure 57, is the second of three Economic Opportunity Focus Areas along Old National Highway and part of the Old National Main Street area. Old National Park is a mostly vacant 80-acre site. As noted earlier in this report, this focus area is well-suited for a new high-density mixed-use development over the long term. The Department of Economic Development should work to attract a developer or developers for this potential project. This could start with a market potential assessment in the short-term, potentially in tandem with such a study for the Old National Commons area, but not necessarily. The project would more likely be a long-term endeavor to be complete in the next three to seven years.

Plan for Old National and Jonesboro Road

Old National and Jonesboro Road area, as shown in Figure 58, is the third of the three Economic Opportunity Focus Areas along Old National Highway and part of the Old National Main Street area. This area is relatively small but is sufficiently sized for a small new development over the long-term that includes primarily neighborhood serving retail. In the short-term, the Department of Economic Development should commission a market potential assessment for Old National and Jonesboro Road, possibly with the assessment or assessments for the other two parts of Old National but more likely as a stand-alone analysis. As with the other parts of Old National described above, the Department of Economic Development should work to attract a developer for the neighborhood serving retail area. This project may still be a long-term endeavor, but due to its small size, should be completed sooner, within three to five years.

Plan for South Fulton Parkway-Cedar Grove Area

The South Fulton Parkway-Cedar Grove Economic Opportunity Focus Area, as shown in Figure 54, is located in the southwest part of the city of South Fulton. At this juncture, plans for this area include local neighborhood-serving retail and restaurants, possibly some residential uses and small professional offices. The Department of Economic Development should prepare a market assessment for the area to determine the best mix of uses given the current and future market. This could be completed in the short- to medium-term, within two years. If the study demonstrates market potential, the Department of Economic Development should work to attract a developer for the South Fulton Parkway-Cedar Grove focus area. This project would likely be a long-term endeavor, with completion expected in three to seven years, depending on how long it takes to attract a developer or developers to undertake it.

Plan for Campbellton Community District

This Campbellton Community District Economic Opportunity Focus Area, as shown in Figure 60, is partly located in the city of Chattahoochee Hills and partly in the city of South Fulton. The Campbellton Community District is a planned reconstitution of Campbellton, the historic county seat of former Campbell County. The new Campbellton will be a multi-jurisdictional project on the site of the historic town center location. A plan is being developed in 2020 (an RFP for a planning team was issued in December 2019) for a mixed-use village with shops, restaurants, other places of employment, housing and recreational opportunities including collaboration with the concurrent Chattahoochee Riverlands project. The Department of Community Development and Regulatory Affairs and the Department of Economic Development will be involved in the development of the plan that will be completed in the short-term, within one year. Once the plan is approved by both cities, and the project is determined to be feasible in the marketplace (this may require a separate market feasibility study), the two cities will need to work together to identify the developer(s) for the project, probably through an RFP process. This project is substantial in size and likely to be complex in execution. Accordingly, the plan would be a long-term effort, with completion expected in four to six years.

APPENDIX

Exhibit A-1: Counties in the Atlanta-Sandy Springs-Roswell Metropolitan Statistical Area (Atlanta Metro Area)

Barrow County	Haralson County
Bartow County	Heard County
Butts County	Henry County
Carroll County	Jasper County
Cherokee County	Lamar County
Clayton County	Meriwether County
Cobb County	Morgan County
Coweta County	Newton County
Dawson County	Paulding County
DeKalb County	Pickens County
Douglas County	Pike County
Fayette County	Rockdale County
Forsyth County	Spalding County
Fulton County	Walton County
Gwinnett County	

Source: Georgia.gov; BAE, 2019.

Exhibit A-2: Counties in the Atlanta Region as Defined by the Atlanta Regional Commission

Barrow County	Forsyth County
Bartow County	Fulton County
Carroll County	Gwinnett County
Cherokee County	Hall County
Clayton County	Henry County
Cobb County	Newton County
Coweta County	Paulding County
DeKalb County	Rockdale County
Douglas County	Spalding County
Fayette County	Walton County

Sources: Atlanta Regional Commission;
BAE, 2019.

Exhibit A-3: Detailed Household Composition Data, 2010 – 2019

	2010		2019		2010-2019
South Fulton	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Family Households	21,235	69.2%	25,051	69.3%	18.0%
Non-Family Households	9,459	30.8%	11,120	30.7%	17.6%
Total Households	**30,694**	**100.0%**	**36,171**	**100.0%**	**17.8%**
Households with Children Under 18	**8,790**	**37.0%**			

	2010		2019		2010-2019
Fulton County	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Family Households	209,215	55.6%	238,456	54.6%	14.0%
Non-Family Households	167,162	44.4%	198,514	45.4%	18.8%
Total Households	**376,377**	**100.0%**	**436,970**	**100.0%**	**16.1%**
Households with Children Under 18	**88,541**	**32.6%**			

	2010		2019		2010-2019
Atlanta Metro Area	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Family Households	1,326,189	68.2%	1,480,701	67.5%	11.7%
Non-Family Households	617,696	31.8%	714,414	32.5%	15.7%
Total Households	**1,943,885**	**100.0%**	**2,195,115**	**100.0%**	**12.9%**

Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Exhibit A-4: Detailed Age Distribution Data, 2010 – 2019

	2010		2019		2010-2019
South Fulton	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Under 18	24,368	28.9%	26,135	26.1%	7.3%
18-24	6,990	8.3%	8,624	8.6%	23.4%
25-34	12,829	15.2%	14,888	14.9%	16.0%
35-44	13,682	16.2%	14,607	14.6%	6.8%
45-54	10,668	12.7%	13,411	13.4%	25.7%
55-64	9,262	11.0%	10,979	11.0%	18.5%
65 or older	6,413	7.6%	11,532	11.5%	79.8%
Total Population (a)	**84,212**	**100.0%**	**100,176**	**100.0%**	**19.0%**
Median Age	**33.5**		**35.3**		

	2010		2019		2010-2019
Fulton County	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Under 18	219,686	23.9%	231,588	21.8%	5.4%
18-24	98,241	10.7%	112,090	10.6%	14.1%
25-34	153,601	16.7%	173,159	16.3%	12.7%
35-44	142,271	15.5%	151,035	14.2%	6.2%
45-54	129,027	14.0%	139,547	13.2%	8.2%
55-64	94,331	10.2%	122,688	11.6%	30.1%
65 or older	83,424	9.1%	130,266	12.3%	56.1%
Total Population (a)	**920,581**	**100.0%**	**1,060,373**	**100.0%**	**15.2%**
Median Age	**34.2**		**35.8**		

	2010		2019		2010-2019
Atlanta Metro Area	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Under 18	1,400,791	26.5%	1,431,461	23.9%	2.2%
18-24	485,264	9.2%	554,521	9.3%	14.3%
25-34	763,177	14.4%	890,573	14.9%	16.7%
35-44	833,220	15.8%	826,613	13.8%	-0.8%
45-54	775,965	14.7%	817,250	13.7%	5.3%
55-64	553,784	10.5%	724,376	12.1%	30.8%
65 or older	474,527	9.0%	741,468	12.4%	56.3%
Total Population (a)	**5,286,728**	**100.0%**	**5,986,262**	**100.0%**	**13.2%**
Median Age	**34.9**		**36.4**		

Notes:
(a) Totals may not match totals in other tables due to independent rounding.

Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Exhibit A-5: Detailed Race and Ethnicity Data, 2010 – 2019

South Fulton	2010 Number	2010 Percent	2019 Number	2019 Percent	2010-2019 % Change
Hispanic/Latino (a)	**2,324**	**2.8%**	**2,490**	**2.5%**	**7.1%**
Not Hispanic/Latino	**81,886**	**97.2%**	**97,687**	**97.5%**	**19.3%**
White	4,632	5.5%	5,062	5.1%	9.3%
Black/African American	75,154	89.2%	89,670	89.5%	19.3%
Native American	152	0.2%	150	0.1%	-1.3%
Asian	490	0.6%	841	0.8%	71.6%
Native Hawaiian/Pacific Islander	21	0.0%	20	0.0%	-4.8%
Other	153	0.2%	173	0.2%	13.1%
Two or More Races	1,284	1.5%	1,771	1.8%	37.9%
Total Population	**84,210**	**100.0%**	**100,177**	**100.0%**	**19.0%**

Fulton County	2010 Number	2010 Percent	2019 Number	2019 Percent	2010-2019 % Change
Hispanic/Latino (a)	**72,566**	**7.9%**	**76,157**	**7.2%**	**4.9%**
Not Hispanic/Latino	**848,015**	**92.1%**	**984,216**	**92.8%**	**16.1%**
White	376,014	40.8%	410,488	38.7%	9.2%
Black/African American	400,457	43.5%	461,830	43.6%	15.3%
Native American	1,586	0.2%	1,563	0.1%	-1.5%
Asian	51,304	5.6%	85,016	8.0%	65.7%
Native Hawaiian/Pacific Islander	287	0.0%	283	0.0%	-1.4%
Other	2,582	0.3%	2,909	0.3%	12.7%
Two or More Races	15,785	1.7%	22,127	2.1%	40.2%
Total Population	**920,581**	**100.0%**	**1,060,373**	**100.0%**	**15.2%**

Atlanta Metro Area	2010 Number	2010 Percent	2019 Number	2019 Percent	2010-2019 % Change
Hispanic/Latino (a)	**547,894**	**10.4%**	**651,647**	**10.9%**	**18.9%**
Not Hispanic/Latino	**4,738,834**	**89.6%**	**5,334,615**	**89.1%**	**12.6%**
White	2,684,571	50.8%	2,765,909	46.2%	3.0%
Black/African American	1,684,178	31.9%	2,035,739	34.0%	20.9%
Native American	10,779	0.2%	11,132	0.2%	3.3%
Asian	252,616	4.8%	372,329	6.2%	47.4%
Native Hawaiian/Pacific Islander	2,075	0.0%	2,474	0.0%	19.2%
Other	13,749	0.3%	15,338	0.3%	11.6%
Two or More Races	90,866	1.7%	131,694	2.2%	44.9%
Total Population	**5,286,728**	**100.0%**	**5,986,262**	**100.0%**	**13.2%**

Notes:
(a) Includes all races for those of Hispanic/Latino background.

Sources: U.S. Census Bureau, 2010 Census; Esri Business Analyst; BAE, 2020.

Exhibit A-6: Detailed Income Data, 2010 – 2019

	South Fulton		Fulton County		Atlanta Metro Area	
Household Income Category	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Less than $15,000	3,141	8.7%	45,514	10.4%	177,635	8.1%
$15,000-$24,999	2,890	8.0%	35,298	8.1%	167,986	7.7%
$25,000-$34,999	3,182	8.8%	35,398	8.1%	181,476	8.3%
$35,000-$49,999	5,208	14.4%	46,953	10.7%	272,458	12.4%
$50,000-$74,999	7,580	21.0%	73,756	16.9%	400,977	18.3%
$75,000-$99,999	5,080	14.0%	45,839	10.5%	297,017	13.5%
$100,000-$149,999	5,540	15.3%	63,070	14.4%	354,242	16.1%
$150,000-$199,999	1,747	4.8%	30,190	6.9%	159,328	7.3%
$200,000 or more	1,804	5.0%	60,939	13.9%	183,976	8.4%
Total Households (a)	**36,172**	**100.0%**	**436,957**	**100.0%**	**2,195,095**	**100.0%**
Median HH Income	**$59,540**		**$66,925**		**$66,656**	
Per Capita Income	**$28,915**		**$44,854**		**$34,450**	

(a) Totals may not match totals in other tables due to independent rounding.

Sources: Esri Business Analyst; BAE, 2020.

Exhibit A-7: Detailed Educational Attainment Data for Population Aged 25+, 2019

	South Fulton		Fulton County		Atlanta Metro Area	
Educational Attainment	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Less than 9th Grade	1,239	1.9%	16,606	2.3%	150,824	3.8%
9th to 12th Grade, No Diploma	3,673	5.6%	36,676	5.1%	252,236	6.3%
High School Graduate (incl. Equivalency)	16,525	25.3%	129,368	18.1%	972,048	24.3%
Some College, No Degree	14,936	22.8%	116,541	16.3%	774,984	19.4%
Associate Degree	6,180	9.4%	45,140	6.3%	311,590	7.8%
Bachelor's Degree	13,207	20.2%	218,760	30.5%	957,685	23.9%
Graduate/Professional Degree	9,656	14.8%	153,604	21.4%	580,913	14.5%
Total Population Age 25+	**65,416**	**100.0%**	**716,695**	**100.0%**	**4,000,280**	**100.0%**
Population 25+ with Bachelor's Degree or Higher (%)	**35.0%**		**52.0%**		**38.5%**	
Population 25+ High School Graduate (incl. Equivalency) or Higher (%)	**92.5%**		**92.6%**		**89.9%**	

Sources: Esri Business Analyst; BAE, 2020.

Exhibit A-8: Employed Residents by Industry in South Fulton, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	13	0.0%	16	0.0%	3	23.1%
Mining	5	0.0%	7	0.0%	2	40.0%
Utilities	101	0.3%	120	0.3%	19	18.8%
Construction	469	1.6%	786	2.1%	317	67.6%
Manufacturing	1,312	4.4%	1,556	4.1%	244	18.6%
Wholesale Trade	1,385	4.7%	1,739	4.6%	354	25.6%
Retail Trade	2,554	8.6%	3,576	9.4%	1,022	40.0%
Transportation and Warehousing	3,121	10.5%	4,325	11.3%	1,204	38.6%
Information	995	3.4%	1,243	3.3%	248	24.9%
Finance and Insurance	1,363	4.6%	1,501	3.9%	138	10.1%
Real Estate Rental and Leasing	532	1.8%	764	2.0%	232	43.6%
Professional, Scientific, and Technical Services	1,610	5.4%	1,861	4.9%	251	15.6%
Management of Companies and Enterprises	619	2.1%	768	2.0%	149	24.1%
Administrative, Support, Waste Mgmt & Remediation	2,968	10.0%	4,170	10.9%	1,202	40.5%
Educational Services	2,463	8.3%	3,751	9.8%	1,288	52.3%
Health Care and Social Assistance	3,792	12.8%	4,758	12.5%	966	25.5%
Arts, Entertainment, and Recreation	264	0.9%	422	1.1%	158	59.8%
Accommodation and Food Services	2,807	9.5%	4,012	10.5%	1,205	42.9%
Other Services (except Public Administration)	704	2.4%	949	2.5%	245	34.8%
Public Administration	2,553	8.6%	1,845	4.8%	-708	-27.7%
Total	**29,630**	**100.0%**	**38,169**	**100.0%**	**8,539**	**28.8%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-9: Employed Residents by Industry in Fulton County, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	233	0.1%	241	0.1%	8	3.4%
Mining	108	0.0%	163	0.0%	55	50.9%
Utilities	934	0.3%	1,117	0.3%	183	19.6%
Construction	8,028	2.2%	11,495	2.7%	3,467	43.2%
Manufacturing	15,253	4.2%	17,149	4.1%	1,896	12.4%
Wholesale Trade	22,324	6.2%	24,065	5.7%	1,741	7.8%
Retail Trade	32,451	9.0%	37,236	8.9%	4,785	14.7%
Transportation and Warehousing	19,783	5.5%	24,186	5.8%	4,403	22.3%
Information	20,160	5.6%	23,427	5.6%	3,267	16.2%
Finance and Insurance	22,865	6.3%	25,331	6.0%	2,466	10.8%
Real Estate Rental and Leasing	8,065	2.2%	9,977	2.4%	1,912	23.7%
Professional, Scientific, and Technical Services	42,082	11.7%	49,907	11.9%	7,825	18.6%
Management of Companies and Enterprises	9,601	2.7%	12,399	3.0%	2,798	29.1%
Administrative, Support, Waste Mgmt & Remediation	33,373	9.2%	40,104	9.6%	6,731	20.2%
Educational Services	24,273	6.7%	30,629	7.3%	6,356	26.2%
Health Care and Social Assistance	37,620	10.4%	43,680	10.4%	6,060	16.1%
Arts, Entertainment, and Recreation	4,853	1.3%	5,900	1.4%	1,047	21.6%
Accommodation and Food Services	33,632	9.3%	39,872	9.5%	6,240	18.6%
Other Services (except Public Administration)	9,715	2.7%	11,467	2.7%	1,752	18.0%
Public Administration	15,709	4.4%	10,906	2.6%	-4,803	-30.6%
Total	**361,062**	**100.0%**	**419,251**	**100.0%**	**58,189**	**16.1%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-10: Employed Residents by Industry in the Atlanta Metro Area, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	2,658	0.1%	2,839	0.1%	181	6.8%
Mining	1,087	0.1%	1,464	0.1%	377	34.7%
Utilities	9,304	0.4%	9,335	0.4%	31	0.3%
Construction	78,198	3.7%	106,231	4.4%	28,033	35.8%
Manufacturing	148,324	7.0%	162,609	6.8%	14,285	9.6%
Wholesale Trade	140,096	6.6%	149,291	6.3%	9,195	6.6%
Retail Trade	234,140	11.0%	261,814	11.0%	27,674	11.8%
Transportation and Warehousing	119,042	5.6%	137,437	5.8%	18,395	15.5%
Information	84,710	4.0%	93,601	3.9%	8,891	10.5%
Finance and Insurance	104,718	4.9%	112,545	4.7%	7,827	7.5%
Real Estate Rental and Leasing	37,878	1.8%	44,380	1.9%	6,502	17.2%
Professional, Scientific, and Technical Services	176,253	8.3%	199,320	8.3%	23,067	13.1%
Management of Companies and Enterprises	46,247	2.2%	56,453	2.4%	10,206	22.1%
Administrative, Support, Waste Mgmt & Remediation	172,945	8.1%	196,241	8.2%	23,296	13.5%
Educational Services	170,546	8.0%	200,170	8.4%	29,624	17.4%
Health Care and Social Assistance	230,885	10.8%	262,311	11.0%	31,426	13.6%
Arts, Entertainment, and Recreation	24,202	1.1%	28,451	1.2%	4,249	17.6%
Accommodation and Food Services	188,521	8.9%	220,954	9.3%	32,433	17.2%
Other Services (except Public Administration)	54,794	2.6%	63,061	2.6%	8,267	15.1%
Public Administration	103,864	4.9%	78,892	3.3%	-24,972	-24.0%
Total	**2,128,412**	**100.0%**	**2,387,399**	**100.0%**	**258,987**	**12.2%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-11: Jobs by Industry in South Fulton, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	21	0.2%	34	0.2%	13	61.9%
Mining	5	0.0%	0	0.0%	-5	n.a.
Utilities	8	0.1%	4	0.0%	-4	-50.0%
Construction	194	1.5%	106	0.7%	-88	-45.4%
Manufacturing	1,005	7.8%	1,472	9.9%	467	46.5%
Wholesale Trade	2,418	18.7%	1,693	11.4%	-725	-30.0%
Retail Trade	1,735	13.4%	2,100	14.2%	365	21.0%
Transportation and Warehousing	857	6.6%	1,004	6.8%	147	17.2%
Information	42	0.3%	15	0.1%	-27	-64.3%
Finance and Insurance	1,417	10.9%	1,305	8.8%	-112	-7.9%
Real Estate Rental and Leasing	133	1.0%	177	1.2%	44	33.1%
Professional, Scientific, and Technical Services	201	1.6%	475	3.2%	274	136.3%
Management of Companies and Enterprises	89	0.7%	7	0.0%	-82	-92.1%
Administrative, Support, Waste Mgmt & Remediation	841	6.5%	1,465	9.9%	624	74.2%
Educational Services	1,579	12.2%	1,616	10.9%	37	2.3%
Health Care and Social Assistance	822	6.3%	1,334	9.0%	512	62.3%
Arts, Entertainment, and Recreation	81	0.6%	86	0.6%	5	6.2%
Accommodation and Food Services	1,179	9.1%	1,494	10.1%	315	26.7%
Other Services (except Public Administration)	248	1.9%	407	2.8%	159	64.1%
Public Administration	74	0.6%	0	0.0%	-74	-100.0%
Total	**12,949**	**100.0%**	**14,794**	**100.0%**	**1,845**	**14.2%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-12: Jobs by Industry in Fulton County, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	219	0.0%	154	0.0%	-65	-29.7%
Mining	108	0.0%	396	0.0%	288	266.7%
Utilities	2,859	0.4%	3,187	0.4%	328	11.5%
Construction	13,696	1.9%	17,481	2.1%	3,785	27.6%
Manufacturing	26,096	3.6%	28,623	3.5%	2,527	9.7%
Wholesale Trade	41,815	5.7%	43,383	5.2%	1,568	3.7%
Retail Trade	52,028	7.1%	57,641	7.0%	5,613	10.8%
Transportation and Warehousing	59,517	8.2%	70,802	8.6%	11,285	19.0%
Information	47,232	6.5%	57,062	6.9%	9,830	20.8%
Finance and Insurance	50,572	6.9%	54,220	6.6%	3,648	7.2%
Real Estate Rental and Leasing	17,274	2.4%	21,108	2.6%	3,834	22.2%
Professional, Scientific, and Technical Services	88,818	12.2%	100,514	12.1%	11,696	13.2%
Management of Companies and Enterprises	15,132	2.1%	23,401	2.8%	8,269	54.6%
Administrative, Support, Waste Mgmt & Remediation	67,251	9.2%	78,934	9.5%	11,683	17.4%
Educational Services	38,848	5.3%	47,971	5.8%	9,123	23.5%
Health Care and Social Assistance	70,830	9.7%	86,128	10.4%	15,298	21.6%
Arts, Entertainment, and Recreation	10,521	1.4%	12,596	1.5%	2,075	19.7%
Accommodation and Food Services	61,804	8.5%	70,923	8.6%	9,119	14.8%
Other Services (except Public Administration)	19,195	2.6%	21,822	2.6%	2,627	13.7%
Public Administration	44,030	6.0%	31,200	3.8%	-12,830	-29.1%
Total	**727,845**	**100.0%**	**827,546**	**100.0%**	**99,701**	**13.7%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-13: Jobs by Industry in the Atlanta Metro Area, 2013 and 2017

	2013		2017		Change	
Industry	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing and Hunting	1,726	0.1%	1,969	0.1%	243	14.1%
Mining	957	0.0%	1,461	0.1%	504	52.7%
Utilities	9,943	0.4%	10,139	0.4%	196	2.0%
Construction	84,695	3.8%	117,720	4.7%	33,025	39.0%
Manufacturing	148,732	6.7%	162,718	6.6%	13,986	9.4%
Wholesale Trade	150,867	6.8%	159,879	6.4%	9,012	6.0%
Retail Trade	246,180	11.1%	276,854	11.1%	30,674	12.5%
Transportation and Warehousing	125,729	5.7%	144,790	5.8%	19,061	15.2%
Information	88,660	4.0%	98,863	4.0%	10,203	11.5%
Finance and Insurance	107,742	4.9%	115,291	4.6%	7,549	7.0%
Real Estate Rental and Leasing	39,520	1.8%	46,177	1.9%	6,657	16.8%
Professional, Scientific, and Technical Services	185,665	8.4%	209,763	8.4%	24,098	13.0%
Management of Companies and Enterprises	48,790	2.2%	60,238	2.4%	11,448	23.5%
Administrative, Support, Waste Mgmt & Remediation	184,491	8.3%	205,423	8.3%	20,932	11.3%
Educational Services	171,915	7.8%	202,626	8.2%	30,711	17.9%
Health Care and Social Assistance	232,058	10.5%	264,567	10.7%	32,509	14.0%
Arts, Entertainment, and Recreation	25,069	1.1%	29,307	1.2%	4,238	16.9%
Accommodation and Food Services	192,680	8.7%	225,958	9.1%	33,278	17.3%
Other Services (except Public Administration)	56,935	2.6%	65,812	2.7%	8,877	15.6%
Public Administration	107,882	4.9%	83,810	3.4%	-24,072	-22.3%
Total	**2,210,236**	**100.0%**	**2,483,365**	**100.0%**	**273,129**	**12.4%**

Sources: Longitudinal Employer-Household Dynamics via OnTheMap; BAE, 2020.

Exhibit A-14: Detailed Data on Occupied Housing Units by Tenure, 2010-2019

	2010		2019		2010-2019
South Fulton	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Occupied Units	**30,694**	**88.9%**	**36,171**	**92.3%**	**17.8%**
Owner-Occupied	22,241	64.4%	26,472	67.5%	19.0%
Renter-Occupied	8,453	24.5%	9,699	24.7%	14.7%
Vacant Units	**3,837**	**11.1%**	**3,023**	**7.7%**	**-21.2%**
Total Units	**34,531**	**100%**	**39,194**	**100%**	**13.5%**

	2010		2019		2010-2019
Fulton County	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Occupied Units	**376,377**	**86.1%**	**436,970**	**88.7%**	**16.1%**
Owner-Occupied	202,262	46.3%	221,311	44.9%	9.4%
Renter-Occupied	174,115	39.8%	215,659	43.8%	23.9%
Vacant Units	**60,728**	**13.9%**	**55,681**	**11.3%**	**-8.3%**
Total Units	**437,105**	**100%**	**492,651**	**100%**	**12.7%**

	2010		2019		2010-2019
Atlanta Metro Area	**Number**	**Percent**	**Number**	**Percent**	**% Change**
Occupied Units	**1,943,885**	**89.5%**	**2,195,115**	**91.2%**	**12.9%**
Owner-Occupied	1,285,066	59.1%	1,409,508	58.6%	9.7%
Renter-Occupied	658,819	30.3%	785,607	32.6%	19.2%
Vacant Units	**229,082**	**10.5%**	**211,638**	**8.8%**	**-7.6%**
Total Units	**2,172,967**	**100%**	**2,406,753**	**100%**	**10.8%**

Sources: Esri Business Analyst; BAE 2020.

Exhibit A-15: Detailed Data on Housing Unit Characteristics, 2013 – 2017 Five Year Data

	South Fulton		Fulton County		Atlanta Metro	
Type of Residence	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Single Family Detached	27,675	76.4%	220,644	48.4%	1,506,655	67.1%
Single Family Attached	1,649	4.6%	27,739	6.1%	115,085	5.1%
Multifamily 2 Units	283	0.8%	7,454	1.6%	29,963	1.3%
Multifamily 3-19 Units	5,015	13.9%	106,689	23.4%	330,324	14.7%
Multifamily 20-49 Units	641	1.8%	23,021	5.0%	81,649	3.6%
Multifamily 50+	891	2.5%	68,187	14.9%	113,134	5.0%
Mobile Home/Other (a)	55	0.2%	2,531	0.6%	67,873	3.0%
Total Units	**36,209**	**100.0%**	**456,265**	**100.0%**	**2,244,683**	**100.0%**
Single Family Housing Units	**29,324**	**81.0%**	**248,383**	**54.4%**	**1,621,740**	**72.2%**
Multifamily Housing Units	**6,830**	**18.9%**	**205,351**	**45.0%**	**555,070**	**24.7%**

Notes:
(a) Includes boats, RVs, vans, or any other non-traditional residences.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Exhibit A-16: Detailed Data on Housing by Year Built, 2013 – 2017 Five-Year Data

	South Fulton		Fulton County		Atlanta Metro	
Year Built	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
2014 or Later	526	1.5%	6,430	1.4%	25,567	1.1%
2010-2013	1,396	3.9%	13,289	2.9%	49,103	2.2%
2000-2009	16,816	46.4%	107,124	23.5%	576,453	25.7%
1990-1999	4,180	11.5%	80,271	17.6%	499,625	22.3%
1980-1989	3,608	10.0%	66,637	14.6%	401,662	17.9%
1970-1979	4,936	13.6%	52,524	11.5%	290,112	12.9%
1960-1969	3,163	8.7%	48,338	10.6%	178,181	7.9%
1950-1959	1,034	2.9%	35,256	7.7%	108,951	4.9%
1940-1949	365	1.0%	16,478	3.6%	45,468	2.0%
1939 or Earlier	184	0.5%	29,918	6.6%	69,561	3.1%
Total Units	**36,208**	**100.0%**	**456,265**	**100.0%**	**2,244,683**	**100.0%**
Median Year Built	**2000**		**1987**		**1991**	

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Exhibit A-17: Detailed Commute Time Data, 2013 – 2017 Five-Year Data

	South Fulton		Fulton County		Atlanta Metro Area	
Travel Time to Work	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Less than 15 minutes	4,449	11.6%	84,916	18.8%	438,782	17.4%
15 to 29 minutes	12,038	31.3%	180,157	39.9%	825,641	32.7%
30 to 44 minutes	11,187	29.1%	101,267	22.4%	615,331	24.4%
45 to 59 minutes	5,230	13.6%	41,133	9.1%	306,886	12.2%
60 to 89 minutes	3,848	10.0%	31,826	7.0%	249,998	9.9%
90+ minutes	1,678	4.4%	12,561	2.8%	87,386	3.5%
Total Residents (a)	**38,430**	**100%**	**451,860**	**100%**	**2,524,024**	**100%**

Notes:
(a) Totals may not match totals in other tables due to independent rounding.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Exhibit A-18: Detailed Data on Means of Transportation to Work, 2013 – 2017 Five-Year Data

	South Fulton		Fulton County		Atlanta Metro	
Means of Transportation	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Car, Truck, or Van	**35,401**	**87.6%**	**392,753**	**79.8%**	**2,360,961**	**87.4%**
Drove alone	31,617	78.2%	354,776	72.1%	2,095,023	77.6%
Carpooled	3,784	9.4%	37,977	7.7%	265,938	9.8%
Public Transportation (a)	**2,185**	**5.4%**	**36,957**	**7.5%**	**82,907**	**3.1%**
Bus or Trolley Bus	1,324	3.3%	24,273	4.9%	57,657	2.1%
Streetcar or Trolley Car (b)	860	2.1%	11,440	2.3%	22,460	0.8%
Railroad or Ferryboat	1	0.0%	1,244	0.3%	2,790	0.1%
Walked	**134**	**0.3%**	**12,865**	**2.6%**	**36,328**	**1.3%**
Other (c)	**710**	**1.8%**	**9,285**	**1.9%**	**43,828**	**1.6%**
Worked at Home	**1,978**	**4.9%**	**40,294**	**8.2%**	**176,146**	**6.5%**
Total (d)	**40,408**	**100.0%**	**492,154**	**100.0%**	**2,700,170**	**100.0%**

Notes:
(a) Excludes taxicabs.
(b) Includes subways and elevated light railways.
(c) Includes taxicabs, motorcycles, bicycles, and other means.
(d) Totals may not match totals in other tables due to independent rounding.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample; Esri Business Analyst; BAE, 2020.

Exhibit A-19: Detailed Housing Cost Burden Data, 2013 – 2017 Five-Year Data

Owner Households

	South Fulton		Fulton County		Atlanta Metro	
Percent of Income	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Less than 10 Percent	2,621	12.5%	39,974	19.9%	249,048	19.4%
10 Percent to 19.9 Percent	7,123	34.1%	69,490	34.5%	459,872	35.9%
20 Percent to 29.9 Percent	4,786	22.9%	41,804	20.8%	268,606	21.0%
30 Percent to 39.9 Percent	2,526	12.1%	18,843	9.4%	115,895	9.0%
40 Percent to 49.9 Percent	1,025	4.9%	8,356	4.2%	55,630	4.3%
50 Percent or More	2,538	12.1%	20,943	10.4%	121,668	9.5%
Data Unavailable	277	1.3%	1,735	0.9%	11,363	0.9%
Total Households	**20,896**	**100.0%**	**201,145**	**100.0%**	**1,282,082**	**100.0%**
Cost-Burdened Households (a)	**6,089**	**29.1%**	**48,142**	**23.9%**	**293,193**	**22.9%**
Severely Cost-Burdened Households (b)	**2,538**	**12.1%**	**20,943**	**10.4%**	**121,668**	**9.5%**

Renter Households

	South Fulton		Fulton County		Atlanta Metro	
Percent of Income	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Less than 10 Percent	176	1.6%	6,047	3.2%	22,010	2.9%
10 Percent to 19.9 Percent	1,789	16.6%	38,130	20.0%	155,584	20.8%
20 Percent to 29.9 Percent	2,493	23.2%	46,382	24.3%	175,912	23.6%
30 Percent to 39.9 Percent	1,538	14.3%	28,779	15.1%	113,915	15.3%
40 Percent to 49.9 Percent	1,272	11.8%	16,486	8.6%	67,482	9.0%
50 Percent or More	3,125	29.0%	44,543	23.4%	171,555	23.0%
Data Unavailable	374	3.5%	10,338	5.4%	40,505	5.4%
Total Households	**10,767**	**100.0%**	**190,705**	**100.0%**	**746,963**	**100.0%**
Cost-Burdened Households (a)	**5,935**	**55.1%**	**89,808**	**47.1%**	**352,952**	**47.3%**
Severely Cost-Burdened Households (b)	**3,125**	**29.0%**	**44,543**	**23.4%**	**171,555**	**23.0%**

Notes:
(a) HUD defines cost-burdened households as households with housing costs greater than or equal to 30% of household income.
(b) HUD defines severely cost-burdened households as households with housing costs greater than or equal to 50% of household income.

Sources: U.S. Census Bureau, American Community Survey 2013-2017 5-Year Sample Data; Esri Business Analyst; BAE, 2020.

Exhibit A-20: Multifamily Rental Market Summary, Q1 2019

South Fulton

	Studio	1 BR	2 BR	3 BR	4+ BR	All Unit Types (a)
Inventory, Q1 2019 (units)	-	1,030	2,321	627	8	3,986
% of Units	-	25.8%	58.2%	15.7%	0.2%	100.0%
Occupied Units	-	825	2,010	535	8	3,378
Vacant Units	-	205	311	92	0	608
Vacancy Rate	-	19.9%	13.4%	14.7%	0.0%	15.3%
Average Rents, Q1 2018 - Q1 2019 (b)						
Average Rent, Q1 2018	-	$815	$930	$1,152	$1,497	$937
Average Rent, Q1 2019	-	$893	$1,019	$1,268	$1,258	$1,027
% Change Q1 2018 - Q1 2019	-	9.6%	9.6%	10.1%	-16.0%	9.6%

Fulton County

	Studio	1 BR	2 BR	3 BR	4+ BR	All Unit Types (a)
Inventory, Q1 2019 (units)	4,894	58,423	63,534	10,633	2,338	145,267
% of Units	3.5%	41.8%	45.4%	7.6%	1.7%	100.0%
Occupied Units	4,392	52,184	55,982	9,276	1,958	128,798
Vacant Units	502	6,239	7,552	1,357	380	16,469
Vacancy Rate	10.3%	10.7%	11.9%	12.8%	16.3%	11.3%
Average Rents, Q1 2018 - Q1 2019 (b)						
Average Rent, Q1 2018	$1,327	$1,255	$1,445	$1,700	$1,008	$1,375
Average Rent, Q1 2019	$1,346	$1,309	$1,502	$1,759	$1,044	$1,430
% Change Q1 2018 - Q1 2019	1.4%	4.3%	3.9%	3.5%	3.6%	4.0%

Atlanta Metro Area

	Studio	1 BR	2 BR	3 BR	4+ BR	All Unit Types (a)
Inventory, Q1 2019 (units)	7,819	160,218	205,434	43,017	6,276	435,208
% of Units	1.8%	37.9%	48.6%	10.2%	1.5%	100.0%
Occupied Units	7,032	146,598	188,280	39,379	5,610	398,482
Vacant Units	787	13,620	17,154	3,638	666	36,726
Vacancy Rate	10.1%	8.5%	8.4%	8.5%	10.6%	8.4%
Average Rents, Q1 2018 - Q1 2019 (b)						
Average Rent, Q1 2018	$1,323	$1,091	$1,218	$1,367	$1,102	$1,185
Average Rent, Q1 2019	$1,349	$1,147	$1,286	$1,439	$1,138	$1,248
% Change Q1 2018 - Q1 2019	2.0%	5.1%	5.6%	5.3%	3.3%	5.3%

Notes:
(a) Unit totals may not add up due to some units lacking classification by number of bedrooms.
(b) Market-rate units only.

Sources: CoStar; BAE, 2019.

Exhibit A-21: Home Sales in South Fulton, April 2018 – March 2019

Single Family Homes

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	1	10	45	11	-	**67**	**7.5%**
$100,000-$149,999	-	10	137	43	1	**191**	**21.2%**
$150,000-$199,999	-	4	108	147	-	**259**	**28.8%**
$200,000-$249,000	-	1	45	149	-	**195**	**21.7%**
$250,000-$299,999	-	-	17	85	1	**103**	**11.5%**
$300,000-$349,999	-	1	1	38	-	**40**	**4.4%**
More than $350,000	-	-	8	36	-	**44**	**4.9%**
Total Number	**1**	**26**	**361**	**509**	**2**	**899**	**100.0%**
% Total	**0.1%**	**2.9%**	**40.2%**	**56.6%**	**0.2%**	**100.0%**	
Median Sale Price	**$58,500**	**$114,500**	**$147,000**	**$214,900**	**$0**	**$186,450**	
Average Sale Price	**$58,500**	**$119,154**	**$160,354**	**$228,428**	**$203,000**	**$197,687**	
Average Price/SF	**$54**	**$97**	**$94**	**$81**	**$30**	**$86**	

Townhomes

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	-	3	10	1	-	**14**	**13.2%**
$100,000-$149,999	-	16	42	6	-	**64**	**60.4%**
$150,000-$199,999	-	-	19	5	-	**24**	**22.6%**
$200,000-$249,000	-	-	-	1	-	**1**	**0.9%**
$250,000-$299,999	-	-	-	2	-	**2**	**1.9%**
$300,000-$349,999	-	-	-	-	-	**-**	**0.0%**
More than $350,000	-	-	1	-	-	**1**	**0.9%**
Total Number	**-**	**19**	**72**	**15**	**-**	**106**	**100.0%**
% Total	**0.0%**	**17.9%**	**67.9%**	**14.2%**	**0.0%**	**100.0%**	
Median Sale Price	**-**	**$105,000**	**$139,500**	**$170,000**	**-**	**$130,000**	
Average Sale Price	**-**	**$107,253**	**$137,351**	**$167,600**	**-**	**$136,237**	
Average Price/SF	**-**	**$75**	**$82**	**$92**	**-**	**$83**	

Condos

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	1	4	6	-	-	**11**	**91.7%**
$100,000-$149,999	-	-	-	-	-	**-**	**0.0%**
$150,000-$199,999	-	-	-	-	1	**1**	**8.3%**
$200,000-$249,000	-	-	-	-	-	**-**	**0.0%**
$250,000-$299,999	-	-	-	-	-	**-**	**0.0%**
$300,000-$349,999	-	-	-	-	-	**-**	**0.0%**
More than $350,000	-	-	-	-	-	**-**	**0.0%**
Total Number	**1**	**4**	**6**	**-**	**1**	**12**	**100.0%**
% Total	**8.3%**	**33.3%**	**50.0%**	**0.0%**		**100.0%**	
Median Sale Price	**$23,500**	**$40,950**	**$33,450**	**-**	**$189,000**	**$33,450**	
Average Sale Price	**$23,500**	**$40,475**	**$33,650**	**-**	**-**	**$48,025**	
Average Price/SF	**$36**	**$46**	**$24**	**-**	**-**	**$33**	

Sources: ListSource/CoreLogic; BAE, 2019.
Only includes sales for which sale price data are available

Exhibit A-22: Home Sales in Fulton County, April 2018 – March 2019

Single Family Homes

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	31	927	1,279	196	51	**2,484**	**18.1%**
$100,000-$149,999	15	370	876	259	11	**1,531**	**11.1%**
$150,000-$199,999	6	229	632	441	51	**1,359**	**9.9%**
$200,000-$249,000	6	176	408	368	37	**995**	**7.2%**
$250,000-$299,999	7	108	436	284	22	**857**	**6.2%**
$300,000-$349,999	3	95	402	340	18	**858**	**6.2%**
More than $350,000	10	360	1,471	3,692	132	**5,665**	**41.2%**
Total Number	**78**	**2,265**	**5,504**	**5,580**	**322**	**13,749**	**100.0%**
% Total	**0.6%**	**16.5%**	**40.0%**	**40.6%**	**2.3%**	**100.0%**	
Median Sale Price	**$120,000**	**$124,900**	**$195,000**	**$453,000**	**$268,500**	**$279,900**	
Average Sale Price	**$167,281**	**$208,458**	**$279,257**	**$565,236**	**$506,398**	**$388,329**	
Average Price/SF	**$177**	**$164**	**$156**	**$166**	**$151**	**$162**	

Townhomes

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	-	31	63	1	-	**95**	**5.2%**
$100,000-$149,999	-	86	134	17	4	**241**	**13.3%**
$150,000-$199,999	2	90	77	17	6	**192**	**10.6%**
$200,000-$249,000	18	101	113	2	-	**234**	**12.9%**
$250,000-$299,999	7	83	145	17	-	**252**	**13.9%**
$300,000-$349,999	9	58	86	34	1	**188**	**10.4%**
More than $350,000	2	134	348	98	26	**608**	**33.6%**
Total Number	**38**	**583**	**966**	**186**	**37**	**1,810**	**100.0%**
% Total	**2.1%**	**32.2%**	**53.4%**	**10.3%**	**2.0%**	**100.0%**	
Median Sale Price	**$241,100**	**$243,000**	**$277,450**	**$361,000**	**$540,100**	**$273,200**	
Average Sale Price	**$268,679**	**$262,862**	**$322,176**	**$450,128**	**$1,151,738**	**$332,055**	
Average Price/SF	**$254**	**$173**	**$160**	**$179**	**$199**	**$169**	

Condos

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	75	123	54	2	6	**260**	**5.0%**
$100,000-$149,999	478	260	46	1	7	**792**	**15.2%**
$150,000-$199,999	442	538	66	2	5	**1,053**	**20.2%**
$200,000-$249,000	468	435	75	1	4	**983**	**18.8%**
$250,000-$299,999	267	386	64	3	9	**729**	**14.0%**
$300,000-$349,999	133	265	86	-	-	**484**	**9.3%**
More than $350,000	94	605	189	25	3	**916**	**17.6%**
Total Number	**1,957**	**2,612**	**580**	**34**	**34**	**5,217**	**100.0%**
% Total	**37.5%**	**50.1%**	**11.1%**	**0.7%**	**0.7%**	**100.0%**	
Median Sale Price	**$197,900**	**$245,000**	**$289,500**	**$431,250**	**$176,000**	**$229,000**	
Average Sale Price	**$206,913**	**$283,872**	**$377,520**	**$577,588**	**$400,000**	**$268,098**	
Average Price/SF	**$253**	**$217**	**$187**	**$191**	**$305**	**$228**	

Sources: DQNews/CoreLogic; BAE, 2019.
Only Includes sales for which sale price and square footage data are available

Exhibit A-23: Home Sales in the Atlanta Metro Area, April 2018 – March 2019

Single Family Homes

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	86	1,909	5,363	669	2,669	**10,696**	**10.0%**
$100,000-$149,999	51	1,111	8,819	1,313	2,735	**14,029**	**13.2%**
$150,000-$199,999	35	895	10,944	3,089	5,303	**20,266**	**19.0%**
$200,000-$249,000	22	488	7,219	4,435	4,489	**16,653**	**15.6%**
$250,000-$299,999	14	347	3,767	4,562	3,327	**12,017**	**11.3%**
$300,000-$349,999	12	272	2,170	3,854	2,298	**8,606**	**8.1%**
More than $350,000	26	802	4,715	13,316	5,494	**24,353**	**22.8%**
Total Number	**246**	**5,824**	**42,997**	**31,238**	**26,315**	**106,620**	**100.0%**
% Total	**0.2%**	**5.5%**	**40.3%**	**29.3%**	**24.7%**	**100.0%**	
Median Sale Price	**$130,000**	**$143,700**	**$181,000**	**$319,900**	**$225,000**	**$223,000**	
Average Sale Price	**$172,597**	**$201,941**	**$215,854**	**$387,686**	**$263,855**	**$277,184**	
Average Price/SF	**$164**	**$160**	**$121**	**$121**	**$110**	**$122**	

Townhomes

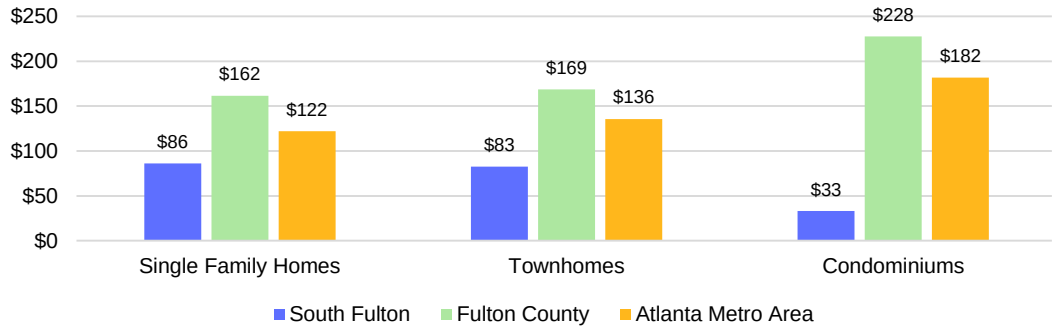
Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	11	277	177	8	27	**500**	**7.9%**
$100,000-$149,999	3	431	406	30	40	**910**	**14.3%**
$150,000-$199,999	4	461	815	59	48	**1,387**	**21.8%**
$200,000-$249,000	26	186	716	51	45	**1,024**	**16.1%**
$250,000-$299,999	27	147	512	53	33	**772**	**12.1%**
$300,000-$349,999	11	129	343	62	15	**560**	**8.8%**
More than $350,000	5	316	651	185	59	**1,216**	**19.1%**
Total Number	**87**	**1,947**	**3,620**	**448**	**267**	**6,369**	**100.0%**
% Total	**1.4%**	**30.6%**	**56.8%**	**7.0%**	**4.2%**	**100.0%**	
Median Sale Price	**$249,000**	**$173,000**	**$225,000**	**$323,750**	**$209,585**	**$215,000**	
Average Sale Price	**$241,990**	**$217,313**	**$261,730**	**$367,019**	**$351,938**	**$259,070**	
Average Price/SF	**$224**	**$136**	**$133**	**$148**	**$108**	**$136**	

Condos

Sale Price Range	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Bedroom Count Unknown	Total	% Total
Less than $100,000	155	511	334	10	17	**1,027**	**10.5%**
$100,000-$149,999	615	876	253	5	26	**1,775**	**18.2%**
$150,000-$199,999	563	1,161	416	15	22	**2,177**	**22.4%**
$200,000-$249,000	548	734	342	8	13	**1,645**	**16.9%**
$250,000-$299,999	293	550	232	24	10	**1,109**	**11.4%**
$300,000-$349,999	136	398	229	18	1	**782**	**8.0%**
More than $350,000	103	718	335	39	27	**1,222**	**12.6%**
Total Number	**2,413**	**4,948**	**2,141**	**119**	**116**	**9,737**	**100.0%**
% Total	**24.8%**	**50.8%**	**22.0%**	**1.2%**	**1.2%**	**100.0%**	
Median Sale Price	**$187,000**	**$195,000**	**$210,000**	**$286,000**	**$192,450**	**$196,400**	
Average Sale Price	**$198,473**	**$234,793**	**$252,670**	**$360,344**	**$288,817**	**$231,905**	
Average Price/SF	**$241**	**$176**	**$131**	**$128**	**$184**	**$182**	

Sources: DQNews/CoreLogic; BAE, 2019.
Only Includes sales for which sale price and square footage data are available

Exhibit A-24: Average Home Sale Price per Square Foot by Unit Type, April 2018 – March 2019



Notes:
(a) Only Includes sales for which sale price and square footage data are available
Sources: ListSource/CoreLogic; DQNews/Corelogic; BAE, 2019.

Exhibit A-25: South Fulton Resident Survey

South Fulton Resident Survey

Thank you for taking a few minutes to tell us about your life in South Fulton. This survey will take about 10 minutes to complete. All answers will be kept confidential.

The information you provide will be used to help strengthen and diversify the economy of South Fulton. Your input will be considered as the City and community leaders strive to improve South Fulton's business climate and attract new business and investment into the community.

Answer any and all questions you choose, but please make sure to press the "Done" button at the end of the survey. Thank you for your participation!

1. In what neighborhood or area of South Fulton do you live? Please provide community/neighborhood name or street name if you prefer.

_____

2. If employed, where is your primary workplace?
___ In South Fulton
___ Outside of South Fulton, but in Fulton County
___ Outside of Fulton County, but in Atlanta area
___ Other (please specify) _____

3. What are the primary reasons you have chosen to live in South Fulton? (Check all that apply.)
___ Convenient location in the metro area
___ Home affordability/value
___ Safety

___ Quality schools
___ Easy access to highways
___ Proximity to family members
___ Proximity to job/work
___ Proximity to church
___ Other _____

4. What are South Fulton's greatest assets?

5. How would you describe South Fulton to someone not from the area?

6. What are the most significant challenges facing South Fulton? (Select up to 3.)
___ Transportation/mobility
___ Employee compensation
___ Resources to support small businesses and start-ups
___ Retail and restaurant options
___ Entertainment options
___ Local property taxes
___ Cost of living
___ Crime
___ Diversity of retail
___ Access to public transit
___ Transportation accessibility (i.e., roads and interstates)
___ Quality of education
___ Available jobs
___ Access to medical facilities and hospitals
___ Traffic
___ Other (please specify) _____

7. How important are the following factors to you? (rate from 1 to 5, with 1 as not important and 5 as very important)
___ Ability to take an active role in the community
___ Ability to walk or conveniently travel to shops and restaurants
___ Affordable healthcare
___ Affordable housing
___ Available jobs
___ Branding and image
___ Community appearance
___ Cost of living
___ Creative and cultural arts scene
___ Employee compensation
___ Local property taxes

___ Parks and resources for recreation
___ Population diversity
___ Quality of public schools
___ Well-maintained streets, roads, sidewalks, etc.

8. Please rate South Fulton on the following factors. (Rate from 1 if poor up to 5 for excellent)
___ Ability to take an active role in the community
___ Ability to walk to shops and restaurants
___ Affordable healthcare
___ Affordable housing
___ Available jobs
___ Branding and image
___ City infrastructure
___ Community appearance
___ Cost of living
___ Creative and cultural arts scene
___ Employee compensation
___ Local property taxes
___ Parks and resources for recreation
___ Population diversity
___ Quality of public schools

9. What other elements that you believe are important for a vibrant community?

10. What type of employers would you like to see expand or locate in South Fulton? (Select up to 5.)
___ Aerospace and defense
___ Call center/order processing
___ Construction
___ Creative arts
___ Distribution and warehousing
___ Educational services and products
___ Entertainment
___ Financial or insurance services
___ Government services
___ Information technology
___ Life sciences
___ Logistics
___ Manufacturing
___ Medicine
___ Non-profit/aid organization
___ Professional services

___ Real estate
___ Research
___ Restaurant
___ Retail
___ Software development
___ Tourism and hospitality
___ Utilities and energy
___ Wholesale trade
___ Other (please specify) _____

11. Please share your thoughts as to how South Fulton can make changes to grow a healthy and sustainable economy?

12. What investments would you like to see in South Fulton? (Select up to 5.)
___ Public schools (K-12)
___ Higher education
___ Vocational schools and training resources (including maker space)
___ Public infrastructure (roadways, utilities, etc.)
___ Public safety
___ Economic development programs
___ Community activities
___ Parks
___ Tourism and promotion
___ Amenities for recreation
___ Other (please specify) _____

13. What housing types are needed in South Fulton? (Check all that apply.)
___ Single family homes suitable for 1st time homeowners
___ Mid-market single family homes
___ Estate single family homes
___ Townhomes
___ Condominiums
___ Apartments – Workforce housing
___ Apartments – Luxury
___ Other _____

14. What transportation improvements are needed in South Fulton?
___ More roads
___ Bus rapid transit
___ Express bus to Downtown Atlanta
___ Light rail via Campbellton/GA 166 (MARTA is bringing light rail and bus rapid transit to Greenbriar)

___ Other _____

15. What is your age?
___ Under 18
___ 18-24
___ 25-34
___ 45-64
___ 65+

16. What is the highest level of education you have received?
___ Some high school
___ High school diploma
___ Some college
___ Associate's degree
___ Bachelor's degree
___ Pose-secondary or professional degree (including Master's and PhD)

17. What is the annual income of everybody in your household?
___ Less than $15,000
___ $15,000 to $34,999
___ $35,000 to $49,999
___ $50,000 to $74,999
___ $75,000 to $99,999
___ $100,000 to $149,999
___ $150,000 or more

18. How long have lived in South Fulton (former unincorporated Fulton County)?
___ Less than one year
___ One to four years
___ Five to Nine years
___ 10-20 years
___ More than 20 years (but not lifelong resident)
___ Lifelong resident

19. Please feel free to add any comments or additional input.

20. If you would like to receive updates on our progress with the economic development strategic plan, please provide your e-mail in the space provided below.