<table>
<thead>
<tr>
<th>Feature</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miles of transit</td>
<td>22</td>
</tr>
<tr>
<td>Acres of environmental clean-up</td>
<td>1,100</td>
</tr>
<tr>
<td>Miles of streetscapes and complete streets</td>
<td>46</td>
</tr>
<tr>
<td>Miles of urban trails</td>
<td>33</td>
</tr>
<tr>
<td>Acres of new greenspace</td>
<td>1,300</td>
</tr>
<tr>
<td>Acres of renovated greenspace</td>
<td>700</td>
</tr>
<tr>
<td>Economic development</td>
<td>$10-20B</td>
</tr>
<tr>
<td>New housing units</td>
<td>28,000</td>
</tr>
<tr>
<td>Affordable units</td>
<td>5,600</td>
</tr>
<tr>
<td>Construction jobs</td>
<td>48,000</td>
</tr>
<tr>
<td>Permanent jobs</td>
<td>30,000</td>
</tr>
<tr>
<td>CORRIDOR-WIDE</td>
<td></td>
</tr>
<tr>
<td>Public art</td>
<td></td>
</tr>
<tr>
<td>Historic preservation</td>
<td></td>
</tr>
<tr>
<td>Arboretum</td>
<td></td>
</tr>
</tbody>
</table>
To be the catalyst for making Atlanta a global beacon for equitable, inclusive, and sustainable city life.

We are delivering transformative public infrastructure that enhances mobility, fosters culture, and improves connections to opportunity. We are building a more socially and economically resilient Atlanta with our partner organizations and host communities through job creation, inclusive transportation systems, affordable housing, and public spaces for all.
Meeting Agenda

• Welcome and Overview
• Study Group Meeting #1 Recap
  • What we heard
• Market Findings Summary
• Future Land Use Issues to Consider
• Mobility Issues to Consider
Subarea Master Plan Purpose

**Goal** - To implement the Redevelopment Plan goals in the context of each unique geographic area

**Purpose** – To guide growth for vibrant, livable mixed-use communities by applying best management practices for transit oriented development, mobility, green space, and alternative modes of transportation
Subarea Master Plan Update
Purpose

• Original 10 Subarea Master Plans created ~10 years ago
• A lot has happened – it’s time to update them to reflect these changes and the potential for the future
• These are UPDATES, so they will not be as long or as detailed as the previous plans
• We are not starting from scratch
Subarea 5 Neighborhoods

• Inman Park
• Martin Luther King, Jr. District
• Old Fourth Ward
• Poncey-Highland
• **Study Group #1: Kick-off Meeting**
  • Thursday, January 17, 2019

• **Study Group #2: Workshop (YOU ARE HERE!)**
  • Saturday, February 23, 2019

• **Study Group #3: Review Draft Recommendations and Concept Plans**
  • Tuesday, April 30, 2019

• **Study Group #4: Final Presentation**
  • Thursday, June 20, 2019

• **Plan Adoption:** 3rd Quarter 2019
Northeast Study Group Recap

50+ people participated
Engaging small group discussions about what an equitable and inclusive community looks like:

- **Inclusive** = all
- **Variety of housing types** – seniors, affordable homeownership, “missing middle”, live-work, micro-units, etc.
- **Mobility that connects** transit and alternative modes, last-mile connections and connections beyond BeltLine
- **Jobs for all levels** of education and incomes; small business and start-up opportunities
- **Places for people to socialize** - small ‘pocket’ parks or corner parks, community gardens
Subarea 5 **Vision** components:
- Dynamic, creative, innovative
- Affordable, livable, and inclusive
- Equitable housing for all socio-economic groups
- Aging in place
- More offices near housing
- Efficient, integrated transit, pedestrian, bike, and scooter accommodations
- Safe
2009 project review:

- Bike/scooter improvements needed: Ralph McGill, Ponce, North, Highland Ave, Glen Iris/Randolph, Freedom PATH
- DeKalb Avenue Complete Streets improvements needed
- Need better curb management: loading/moving zones, Uber/Lyft pick-up
- Sidewalk improvements
2009 project review:

- Improve Bass Park as neighborhood asset
- Place-making initiatives
- Better lighting
- More crosswalks on N. Highland between Elizabeth St and Alaska Ave
- Safe and organized integration of all mobility choices
- Safe, bikeable streets
- Address and support scooters
Physical and Business Environment

Existing Retail Nodes
Subarea 5 is **book-ended by two regional-status** retail, dining and entertainment offerings.

The International Council of Shopping Centers classifies retail areas with gross leasable areas of 400,000-800,000SF as 'regional malls'. Smaller retail nodes with 30,000-125,000SF are classified as Neighborhood Centers.
Market Data and Demographics

Retail Demand
Trade Areas

Primary Trade Area

A 0.5 mile radius along the trail reflects the primary trade area, or the area in which 40-60% of Subarea 5’s customers and users are likely coming from for convenience goods and services.

0.5 mile along the trail

2018 Total Population: 18,062
2023 Total Population: 20,514
A 3-mile and 5-mile radius around Subarea 5 reflects the secondary trade area, or the area in which 10-20% of Subarea 5’s customers and users are likely coming from for destination retail and services.
Understanding Demand

Residents

All demographic and market data presented from year 2010 are based on the Decennial Census while 2018 and 2023 figures have been projected by proprietary data provider, ESRI Business Analyst Online.

Daytime Workers

All daytime population figures are based on 2002-2015 LEHD Origin Destination Employment Statistics (LODES) provided by the Census Bureau.

Visitors

Visitor data figures include annual visitation to major cultural institutions within 0.5 mile of the trail, and is based on publicly available data (press releases, institution websites).
**HOW MUCH ARE RESIDENTS SPENDING NEAR THE BELTLINE?**

For every $1 being spent by residents, 80 cents stays within a half-mile of the trail. **Only 20 cents is ‘leaking’** outside half-mile of the trail in the following categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Merchandise</td>
<td>$58,669,130</td>
</tr>
<tr>
<td>Sporting Goods, Hobby, Books &amp; Music</td>
<td>$5,203,008</td>
</tr>
<tr>
<td>Health &amp; Personal Care</td>
<td>$4,023,453</td>
</tr>
<tr>
<td>Specialty Food</td>
<td>$1,694,259</td>
</tr>
<tr>
<td>Food and Drinking</td>
<td>-$44,218,699</td>
</tr>
<tr>
<td>The surplus indicates that Subarea 5 is already a dining destination, and well-served by grocers.</td>
<td></td>
</tr>
</tbody>
</table>

This typically means there is a market opportunity to capture this unmet demand.

Source: ESRI Business Analyst Online 2018 Retail Marketplace Profile  
Note: Grocery store surplus calculation does not include future retail sales from Kroger at 725 Ponce
Based only on spending from residents living within a half-mile of the trail, there is sufficient demand to support an **additional 500,000-1,000,000 SF of retail** near the BeltLine.

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>Leakage</th>
<th>60% Capture Rate</th>
<th>40% Capture Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Merchandise</td>
<td>$58,669,130</td>
<td>1,068,654 SF</td>
<td>712,436 SF</td>
</tr>
<tr>
<td>Sporting Goods, Hobby, Books and Music</td>
<td>$5,203,008</td>
<td>115,451 SF</td>
<td>76,968 SF</td>
</tr>
<tr>
<td>Health &amp; Personal Care</td>
<td>$4,023,453</td>
<td>69,590 SF</td>
<td>46,393 SF</td>
</tr>
<tr>
<td>Specialty Food</td>
<td>$1,694,259</td>
<td>20,222 SF</td>
<td>13,481 SF</td>
</tr>
</tbody>
</table>

**Total Supportable SF:** 1,273,981 SF

849,278 SF

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Source: ESRI Business Analyst Online 2018 Retail Marketplace Profile; LOA calculations based on 2017 ICSC Atlanta Mall Non-Anchor tenant sales productivity and other industry figures. Note: Miscellaneous Stores refer to florists, used merchandise stores, stationery, gift stores
MAKING SPACE FOR KNOWLEDGE-BASED INDUSTRIES AND START-UP COMPANIES

To grow the share of higher-paying knowledge-based industries and creative TAMI* sectors, office/commercial spaces will need to be diversified.

*TAMI refers to the following sectors: Technology, Advertising, Media, and Information

For example, Fulton County is expected to see the fastest growth in the following creative jobs:

- Film and Video Editors
- Web Developers

| Annual Growth Rate | | |
|--------------------|--------------------|
| 3.82%              | 2.94%              |

+70% Rise in office rents along the BeltLine from five years ago, according to CBRE

2x the share of jobs at startups in the NE quadrant of the BeltLine

More Flexible Spaces that allow businesses to grow in place

Source: CBRE Research (Cumulative % Increase in Average Asking Rents)
Source: BeltLine Economic Analysis Data Baseline 2018
Annual Users of Subarea 5 Trail

The BeltLine attracts visitors who create **additional demand for retail, dining, and recreation activities**.

Based on 2018 Atlanta BeltLine Survey Insights, **about 50% of BeltLine users are visitors who do not live near the current / recent BeltLine development**.

These visitors, who make up close to 1 million annual users, on average, can be **expected to spend between $60-$120 on retail and dining a day**.

Overall Trends

Historically, peak season for the trail has been in the Fall during the months **SEP-OCT**.

Average monthly users of the trail has exceeded **150K**.

Source: Based on ATL BeltLine trail counts at Ponce Ave Bridge and Irwin St from 2017-2018

*ACVB 2014 estimates day trippers spend on average $120 per person/day*
Annual Users of Subarea 5 Trail

As alternative modes of transportation become more popular in the city, the BeltLine must be able to safely and comfortably accommodate visitors arriving by foot, bike, e-scooters, and ride share.

Surveys across the nation have found that riders of micro-mobility options are most commonly traveling to/from dining or entertainment, and commuting to/from work or school*.

Weekday Peak Trail Hours are in the evening:

5-7 pm

Source: Based on ATL BeltLine trail counts at Ponce Ave Bridge and Irwin St from 2017-2018
* Source: Lime 2018 Year-End Report; 2018 E-Scooter Pilot User Survey Results Portland Bureau of Transportation;
Ensuring successful retail along the BeltLine

Visibility/ Accessibility
In some cases, there is no trail signage pointing to retail nodes and amenities that are just off the BeltLine.
Development standards along the trail should encourage clear signage that indicate name of business or development and the use of public art to call attention to local businesses.
Key Findings
Retail and Recreation

- New developments near the trail can support an additional 500,000-1 Million SF of retail in convenience categories such as general merchandise, specialty food, health and personal care, sporting goods/hobby/books/music, and dining
Key Takeaways

Retail and Recreation

1. New developments near the trail can support an additional 500,000-1 Million SF of retail in convenience categories such as general merchandise, specialty food, health and personal care, sporting goods/hobby/books/music, and dining.

2. Commercial rents need to be diverse enough to support a mix of tenants offering low to higher price point goods and services for residents and daytime workers.
   - For example, smaller footprints with lower rents can support small local businesses with limited start-up capital.
Key Takeaways

Retail and Recreation

• New developments near the trail can support an additional 500,000-1 Million SF of retail in convenience categories such as general merchandise, specialty food, health and personal care, sporting goods/hobby/books/music, and dining

• Commercial rents need to be diverse enough to support a mix of tenants offering low to higher price point goods and services for residents and daytime workers
  • For example, smaller footprints with lower rents can support small local businesses with limited start-up capital

• BeltLine and neighboring retail tenants need to be visible online, engaged in omni-channel sales, and have strong social media marketing to capture Gen Z and Millennial spending
Key Takeaways

Housing and Transportation

- The Subarea Master Plan will need to **consider the future housing needs of Millennials with young families**, as well as some Baby Boomers who may be downsizing
- e.g. 2-3 BR units, family-friendly amenities, etc
Key Takeaways

Housing and Transportation

- The Subarea Master Plan will need to consider the future housing needs of Millennials with young families, as well as some Baby Boomers who may be downsizing
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  - e.g. Mandatory inclusionary housing, FAR bonus for affordable housing
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Housing and Transportation

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• **Regulatory tools will need to address the issue of housing equity** in a strong market environment
  • e.g. Mandatory inclusionary housing, FAR bonus for affordable housing

• The Subarea Master Plan should **prioritize access to diverse transportation options**, as preferred by Millennials
  • e.g. Ride-share drop off area requirements, e-scooter and bike parking requirements
Key Takeaways

Office

- To attract a share of the growing creative and knowledge-based jobs, **commercial office spaces will need to be flexible** to accommodate growing companies.
  - Flexible/ Creative spaces provide lease flexibility and collaborative work environments that are attractive to Millennials.
Key Takeaways

4

Signage and Wayfinding

• The Subarea MasterPlan should explore flexibility in signage and façade regulations for properties near the trail in order to ensure that they support the visibility of businesses and amenities.

• BeltLine wayfinding systems and plans should prioritize commercial districts as Points of Interests for users of the trail to drive local spending.
Key Takeaways

Building Frontage and Entrance/Exit

- To increase accessibility of businesses, the Subarea Master Plan should visit development standards for commercial/mixed use properties along the trail to encourage convenient and direct pedestrian/bike/scooter pathways from building entrances to the BeltLine and dedicated parking facilities.
Future Land Use
Activity Centers

1. Ponce City Market / Old Fourth Ward Park
2. Krog Street / DeKalb Avenue
3. Little Five Points
4. Inman Village
5. Edgewood Avenue
Where might future change happen?

• Non-residential land where land value > improvement value
• Clusters along Ponce, Edgewood, DeKalb

• What should the future of these areas look like?

Susceptible to Change

Atlanta BeltLine
Subarea 3

This map was prepared for StanTec in January 2019 and produced under the Atlanta BeltLine interim master plan update along with supporting City of Atlanta, Atlanta BeltLine, City of Atlanta, Fulton County, and Atlanta BeltLine, Inc. Discretionary guidance.
Where might future change happen?

- Non-residential land where land value > improvement value
- Clusters along Ponce, Edgewood, DeKalb
- What should the future of these areas look like?

Susceptible to Change

Analysis indicates potential only and is based on assessed value by the City of Atlanta.
Future Land Use Issues to Consider

• Considerations: existing jobs, low-cost space for small businesses, community authenticity, new development opportunities

• Where should we encourage preservation of existing uses?
• Where should we encourage adaptive reuse?
• Where should we encourage redevelopment?

• Where should future retail be located?
Crash Data 2014-2018
• All reported crashes
• "Hot spots" along:
  • Boulevard at Freedom Pkwy, North Ave, and Ponce
  • Ponce de Leon
  • Krog St tunnel

High – more crashes
Low – fewer crashes
**Crash Data**

**2014-2018**
- 93 reported crashes involving pedestrians
- 24 reported crashes involving bikes
- “Hot spot” corridors:
  - Boulevard
  - Ponce de Leon
  - North Ave
  - N. Highland

![Crash Data Map](image)
2009 Subarea 5 Master Plan

Remaining Projects
Mobility Issues to Consider

• Improvements in a fiscally constrained environment
  • Renew Atlanta Prioritization and Re-baselining

• Redefine mobility options
  • Mobility hubs – scooters, bikes, car share, transit
  • “Last-mile” connections
  • Connections from neighborhoods to BeltLine

• Consider new technology since 2009 plan:
  • Ride share (Uber, Lyft)
  • Bike share
  • Scooters

• “Light touch” improvements
Future Land Use Considerations

• Identify “soft site” areas to Preserve, Adaptively Reuse, or Redevelop

• Where should future retail be located?
Mobility Considerations

- **Where** are today’s mobility priorities? **What types of projects** are they?