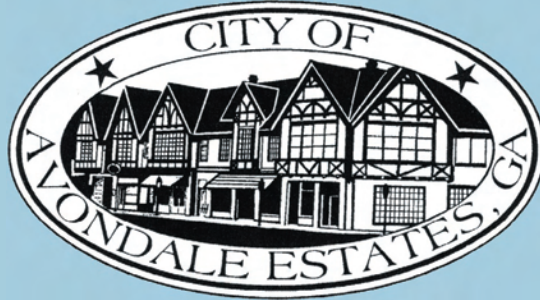




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Avondale Estates Downtown Master Plan

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The Tudor Village pedestrian experience today

INTRODUCTION

The **Avondale Estates Downtown Master Plan** represents Avondale Estate's vision for revitalizing its historic core. In place of a disconnected collection of industrial and auto-oriented uses, the Study envisions a mixed-use downtown featuring restored historic buildings and a range of retail, employment and open space options. Tying these together are a series of new streets, greenways, and pedestrian facilities.

The Study is divided into four sections:

Section 1: Inventory and Analysis

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

Section 2: Visioning

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

Section 3: Implementation

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

Section 4: Appendix

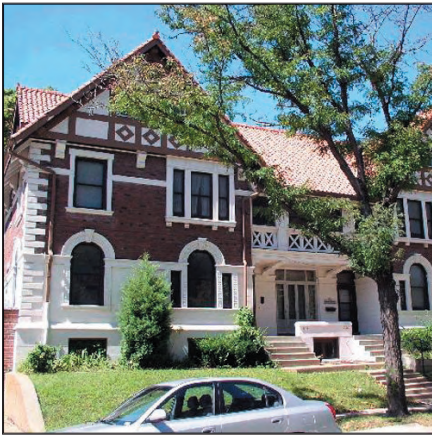
The appendix includes documentation of the public involvement process, as well as detailed data analysis performed during the planning process.

Section 1:
Inventory and Analysis

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Regional land use policies encourage the creation of walkable, mixed use centers, such as this one in West Palm Beach, Florida



Healthy communities include a variety of housing types, such as this Tudor-style multifamily building



A goal of the study is to revitalize the downtown business community

1.1 OVERVIEW

This section provides an overview of Avondale Estates' Downtown Master Plan program and provides a summary of existing conditions within the Study Area. Study Area components are divided into function categories for the purpose of organization. Within each category background information is provided on the importance of each, existing conditions are described, and strengths, weaknesses, opportunities and threats associated with each are summarized.

Purpose of the Study

The City of Avondale Estates seeks to revitalize its downtown commercial core by restoring its visual appeal and establishing a mix of land uses more conducive to local demographics and attractive to customers from the metro area. This Study will assist the community in defining their vision and creating a master plan that outlines proposed land uses and development opportunities for an attractive and sustainable district.

The process of achieving this result involves three essential elements: an Inventory and Analysis of the existing conditions in the Study Area; a community and stakeholder participative process that incorporates residents' and stakeholder ideas and goals; and a synthesis of these two activities with community planning concepts to arrive at a comprehensive vision, master plan, and proactive strategy for implementation.

Goals of the Study

The goals of the Avondale Estates Downtown Master Plan are to:

1. Assist the City of Avondale Estates to control its own destiny as it relates to commercial development.
2. Provide residents with numerous attractive amenities in the downtown to improve their quality of life.
3. Improve the physical aesthetics of the downtown business community.
4. **Ensure the long-term economic viability of the downtown business community.**

Regional Context

Avondale Estates is located in DeKalb County, Georgia, seven miles east of Downtown Atlanta and approximately a mile and a half east of Decatur, the DeKalb County seat. With a population of roughly 2,700, it is the only documented example of new planned community

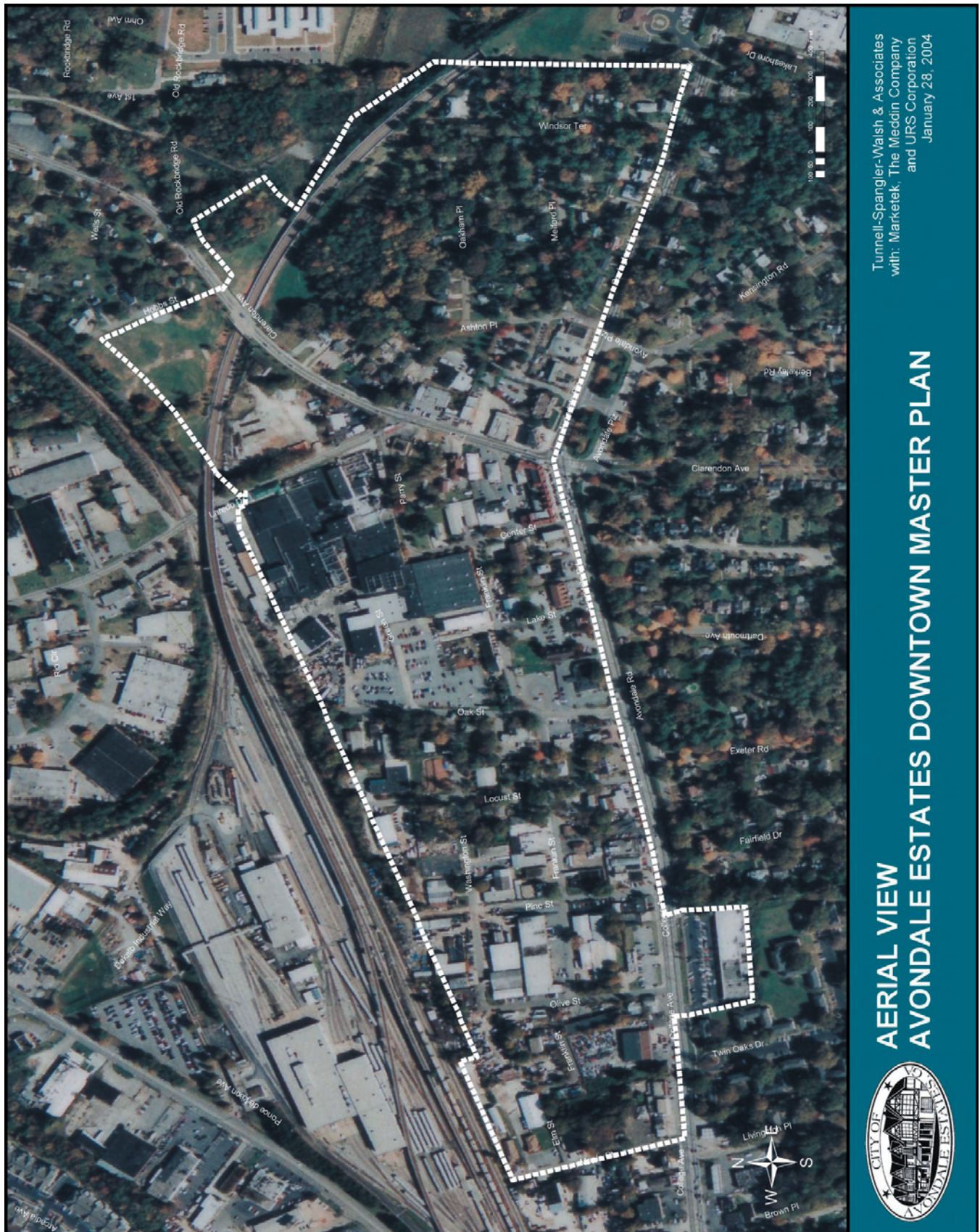


Map showing the location of Avondale Estates in the Atlanta region

in the southeastern United States of an early twentieth century. The closest Interstate Highway is the east side of the Perimeter, I-285, located a mile and a half to the east.

Study Area Boundaries

The Study Area is essentially the Central Business District (CBD) of the city. Located in the northern portion of the city's historic district, the Study Area is bounded by CSX and MARTA rail lines to the north, DeKalb County to the east, Avondale Road to the south, and Maple Street to the west. It encompasses nearly 120 acres, which represents 16% of Avondale Estates' 738 total acres.





Individual buildings can be arranged to form a continuous row



Homes in this neighborhood are arranged to define a park space



Buildings form a wall that defines this park in Spain

1.2 COMMUNITY PATTERNS

Overview

“Spatial form” refers to the way in which the placement and massing of buildings work together to form a space greater than the individual buildings. Different spatial forms have different impacts on human psychology and the ability of places to support certain activities. For example, most people like to feel protected while walking. This is best achieved by making people feel enclosed. From a psychological point of view, a street with a height to width ratio of no more than one-to-three provides the necessary enclosure, with one-to-one being ideal. Therefore, to create an environment where walking is encouraged, the street should respect the ratios, particularly in a downtown environment. Enclosure also has a direct impact on driver behavior; all else being equal, buildings close to the street psychologically narrow it and result in slight decreases in vehicular speeds.

Spatial form takes into account the legibility of a place, or how easy it is for a visitor to quickly understand its overall organization. A figure ground study is a valuable tool for understanding this component of spatial form. In a figure ground study, the placement of buildings and their inter-relationships is reduced to a simple map showing their location on an otherwise blank background. This allows for an understanding of the buildings as objects, and more importantly the spaces between them which reflect public or quasi-public space. As such, the spaces represent the most commonly experienced spaces of a community.

Existing Conditions

As one of the Atlanta region’s only planned “Garden Cities,” the majority of the Avondale Estates has a well-defined and dignified spatial form. Well-proportioned and orderly streets and parks are the hallmark of this historic city. The one exception to this rule, however, is the downtown area.

In the downtown Study Area the spatial definition is weak. Although the Tudor Village’s scale and street-oriented buildings create a well-defined area at the intersection of Clarendon Avenue and Avondale Road, this quickly breaks down as the distance from this node increases. For the majority of the Study Area there is little organization of buildings or the spaces between them. Buildings appear to be placed at random and with no regard for creating anything greater than themselves. Streets are wide and framed with single-story buildings that are set back so far that they create no



Trees help define this residential street in Avondale Estates

enclosure. This not only creates an environment that is pedestrian hostile, but it creates an area that is visually confusing and without a strong focal point. The result is an area that feels disconnected from the urban fabric that is found in the rest of Avondale Estates.

See Figure 2: Figure Ground.

Strengths

- The historic Tudor Village creates a well-defined space at the intersection of Avondale Road and Clarendon Avenue.
- The residential area at the eastern edge of the Study Area is well-defined, with consistent setbacks and ordered building placement.

Weaknesses

- Much of the Study Area is poorly defined.
- Along Avondale Road/College Avenue the hedges and trees to the south define the street, while the north side lacks any defining elements. The result is a street that lacks a strong sense of place.
- Single-story buildings to the north of Avondale Road/College Avenue allow for uninterrupted views to the elevated MARTA rail line.

Opportunities

- Avondale Estates has a history as one of the Atlanta region's great planned "Garden Cities." This tradition could be celebrated by creating a downtown area that is well-defined.
- New buildings could be built close to the street to create a sense of order.
- New buildings could be used to define future public spaces, such as parks or plazas, or a community focal point.
- Streets trees could be used to reinforce the spatial form established by new buildings, while providing shade and an accent of nature in Downtown.

Threats

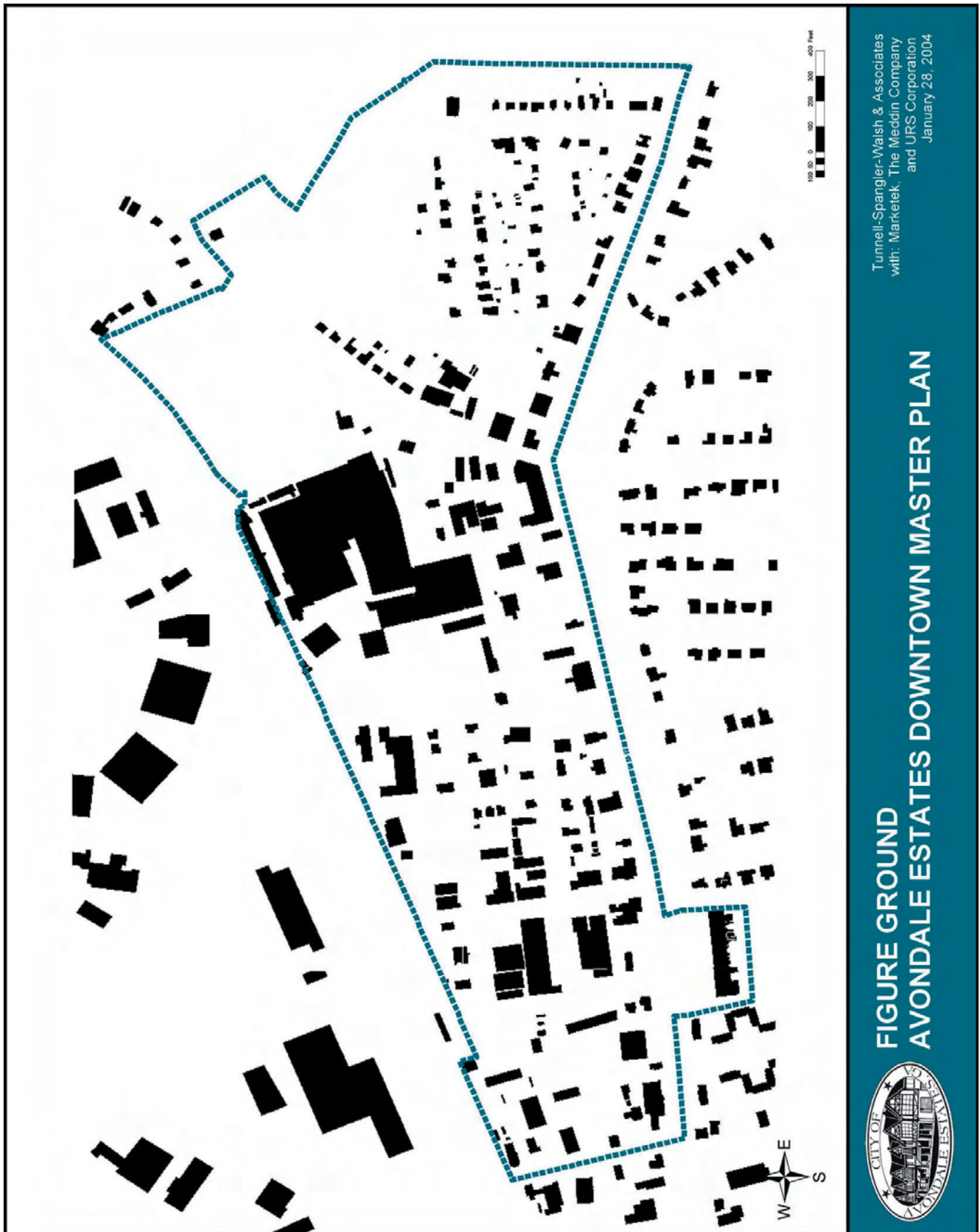
- The continued development of single-story buildings that are set back from the street and surrounded by parking would continue to compromise the spatial form of the Study Area.



College Avenue is poorly defined beyond the Tudor Village



Single-story buildings with frontal parking degrade the spatial form





The arrangement of streets define towns and cities the world over

1.3 STREET PATTERNS

Overview

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

There are two principal types of blocks and street patterns:

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



A dendritic system

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

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



An interconnected system

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

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



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

efficiently when: 1) there are many routes of travel; 2) distances are short; and 3) trips are direct. Generally, this means block sizes of not more than 800 feet in length, but preferably between 200 and 600 feet. In developed areas with an existing *dendritic* system achieving this can be a challenge, because interconnected systems work best when done over a large area. Arterials and collectors often serve transportation needs that extend beyond the immediate area. A localized interconnected system can reduce congestion on these streets by dispersing local trips.

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

Existing Conditions



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

The street pattern in downtown Avondale Estates is primarily an interconnected one. An exception occurs where both north-south and east-west connectivity is severed due to the Fenner manufacturing facility. The street pattern is also disrupted to the north by the CSX (ground level) and MARTA (elevated) train tracks; this results in only one vehicular access route (Laredo Drive). North/south streets within the Study Area include North Clarendon Avenue /Laredo Drive, Center Street, Lake Street, Oak Street, Locust Street, Pine Street, Olive Street, and Maple Street. East/west streets are Washington Street, Franklin Street, Parry Street, Porter Street and Avondale Road.

Blocks within the Study Area are small. West of Oak Street the blocks average 300 by 400 feet or smaller. East of Oak Street, the blocks are larger than to the west, but still much smaller than most blocks within the City of Avondale Estates. Their small size supports pedestrian activity by reducing walking distances. They also provide multiple routes for intra-Study Area travel routes for all transportation modes, thereby decreasing the likelihood of a systematic breakdown.

Strengths

- Interconnected street system
- Small blocks

Weaknesses

- Few east/west connections north of Avondale Road
- Northern barrier created by rail lines
- Superblock between Laredo Drive and Oak Street
- Failure of Franklin Street to connect with Clarendon Avenue



Existing street grid in the Study Area



The Fenner plant creates a disconnect in the street grid



Washington Street terminates at the rail line north of downtown

- Large block between Maple and Olive Streets
- Dead-end along Ashton Place, which limits north-south connections

Opportunities

- Franklin Street could be extended to Clarendon Avenue, or
- Franklin Street could be relocated to between Oak Street and Clarendon Avenue in order to directly connect the two
- Redevelopment between Maple and Olive Streets could create an improved street network
- A new street could be created, parallel to the rail line, to link existing dead-end streets and provide increased route options
- Street offsets could become ideal locations for important new buildings
- The possible Avondale Bypass, a road running from east of the American Legion, north of the rail line, and to Sam's Crossing, could increase route options.

Threats

- Future development could compromise the Study Area's street network by abandoning streets for the sake of ill-conceived development



Pedestrians use the sidewalk to walk to a restaurant in Atlanta



This sidewalk near the front of City Hall was built as part of the streetscape program



Curb cuts detract from the pedestrian experience

1.4 PEDESTRIAN FACILITIES

Overview

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

Existing Conditions

The pedestrian network in the Study Area is fragmented. If all streets north of Avondale Road had sidewalks along both sides, there would be 31,000 linear feet of sidewalks. As it stands, there are only 9,550 linear feet, or 31% of the potential length.

The City's recent streetscape program implemented 4,300 linear feet of sidewalks, with a typical width of five feet and brick pavers on one or both sides; some areas include street trees. The improvements occurred on the north side of Avondale Road and along a portion of Clarendon Avenue. These new sidewalks are compliant with the Americans with Disabilities Act (ADA) and in good conditions. However, the new sidewalks are generally too narrow for more than one person and are often small pedestrian refuges in-between large curb cuts.

Beyond the streetscape project, facilities are severely lacking. Only a few lots in the Study Area have sidewalks on their property, representing a total of 5,250 linear feet. Overall, the condition of these sidewalks is fair to poor. Many are cluttered by utility poles and are too narrow to be effective.

Despite the lack of sidewalks, pedestrians can easily maneuver around the Study Area because of the street grid and the fact that there is little traffic on the narrow streets to the north of Avondale Road. Pedestrian connectivity to the residential area to the east is easily achieved. However, two substantial pedestrian barriers exist between the downtown and adjacent areas: the rail lines on the northern edge prohibit access to this property across the tracks; and the heavy traffic, high-speed Avondale Road is difficult to safely traverse on foot.

A sign at the Avondale Road/Oak Street intersection listing numerous business entities is a positive for the few pedestrians along this route, but is too small to be of use to passing motorists.



Avondale Road is a barrier to pedestrians



This utility pole's placement creates an unusable sidewalk

Strengths

- Narrow streets and small blocks aid pedestrians by calming traffic and provide multiple routes
- Recent streetscape improvements

Weaknesses

- Severe lack of sidewalks in many areas
- Avondale Road and Clarendon Avenue sidewalks are too narrow in many places
- Excessive curb cuts on Avondale Road compromise the pedestrian network
- Connectivity to the north is extremely limited
- Traversing Avondale Road is challenging
- Lack of street trees to shade pedestrians
- High speeds on Avondale Road and Clarendon Avenue create an unpleasant pedestrian experience
- Utility poles, which obstruct sidewalks in certain areas

Opportunities

- The lack of sidewalks presents opportunity to create a nearly “clean slate” approach to their design and may include other elements to enhance the streetscape experience (e.g. street trees, underground utilities, consistent lighting, etc.)
- New development could augment existing public sidewalks with additional width on private property

Threats

- The State’s intentions for rapid vehicular throughput along North Avondale Road (SR 10/278) may prevent pedestrian oriented measures from being enacted
- The lack of maintenance could hinder the creation of a quality pedestrian system over the long-term



A mother experiences a pedestrian-oriented public realm

1.5 PUBLIC REALM

Overview

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

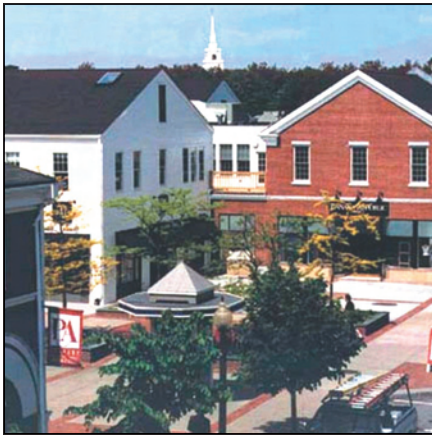
There are five major categories of public space in the USA, each with their own distinct definition and applicability:

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

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

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

Greenways are linear parks that can serve as corridors for transportation, wildlife migration, or protection of key habitats that occur in a linear manner, such as the riparian zones along creeks and rivers. Greenways can also connect plazas, parks and conservation lands. Because of this, they can be located in virtually any setting with varying sizes.



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



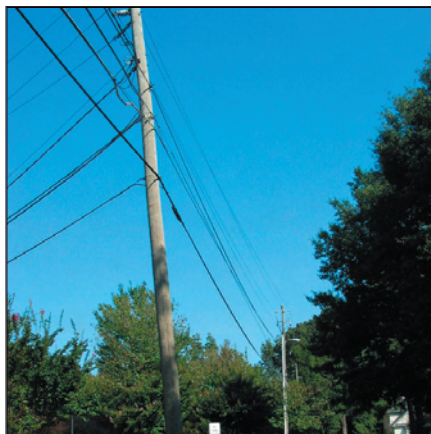
A park is the center of Harbor Town, near Memphis



The clock tower occupies one of two ovular parks in downtown.



The streets south of downtown are dignified public spaces with graceful trees and quality sidewalks



Overhead utility lines create an unpleasant street experience

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

Existing Conditions

The original plan for Avondale Estates incorporated parks, plazas, and quality street experiences for the public's enjoyment. These amenities are still found in the neighborhoods to the south, with Lake Avondale serving as a focal point for many of the City's civic events. In stark contrast, downtown has no parks, plazas, or quality streets. The landscaped median with clock tower on the south side of Avondale Road serves more as a visual buffer than a gathering point. To its east, the two ovular greenspaces are poorly-used and in need of improvement. As a public space, the streets are substandard. Their character is influenced by overhead utility lines and poles and the lack of curb and gutter. Most of downtown does not have street trees, although trees are found on numerous lots. The streets also appears to have problems with storm drainage. Signage also impacts street character and is haphazardly placed throughout the downtown, but largely unobtrusive.

There is a PATH greenway trail that traverses downtown's northeastern portion. The trail winds along the rail lines and crosses over Clarendon Avenue, passing an undeveloped area near the rail overpass that could be turned into a park. In addition, the sizable amount of other vacant or under used lands provides opportunities for the creation of public spaces.

Numerous public buildings exist within the Study Area, including City Hall and the US Post Office. Their location within the city's core, rather than out-of-town, reinforces the civic role of the downtown area. However, some facilities, particularly the post office, could be improved or moved to a better location.

Strengths

- PATH multi-use trail system
- Civic buildings within the downtown area

Weaknesses

- Lack of public (or even private) open/gathering spaces
- Under-utilized ovular parks south of City Hall
- Automobile-oriented streets
- Lack of the ability to use sidewalks as a meaningful public space

Opportunities



Storm drains empty directly into Center Street and suggest that the public realm is a dumping ground

- Creation of new public spaces on undeveloped land
- Creation of new public spaces on redeveloped land
- Improved connections to the PATH system
- Establishment of a town center plaza or park
- Relocated or improved post office

Threats

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



The Ebenezer Baptist Church in Atlanta dignifies the public realm

1.6 ARCHITECTURE

Overview

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

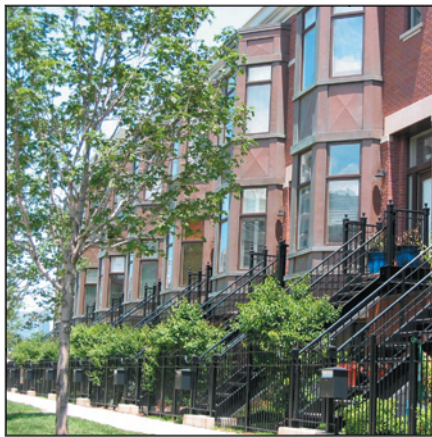
With time, greater setbacks were developed for commercial and residential buildings. In the streetcar suburbs of the early 1900s, houses were usually set ten feet from the sidewalk in the center of town and 30 feet on the edge. As with older villages, cities, and towns, most early suburbs were within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

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

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

Existing Conditions

Avondale Estates is noted for the Tudor Revival architecture found on the two blocks near the Avondale Road/Clarendon Avenue intersection (approximately 500 linear feet). The Tudor Revival style is characterized by multiple gables, half-timbering, multi-paned sash,



These new townhomes in Chicago embrace the sidewalk and create a cohesive street environment



A newer Tudor Revival building on Avondale Road



A National Folk home with Victorian accents on Locust Street



The Waffle House displays a slight Tudor Revival style



Deteriorated house on Maple Street

tile roofs and a picturesque roof line. Buildings are constructed of brick, terra cotta tile and wood. Over time, some of the original styling elements of the Tudor Village have been altered, including storefront and window changes and the replacement of tile roofs with shingle. A few additional buildings along Avondale Road have attempted to incorporate this style, to varying degrees. City Hall, constructed in 1990/91, significantly continues the style. The Avondale Centre professional office building is also similar but its effect is mitigated by its perpendicular orientation to the street. The Waffle House incorporates slight cosmetic modifications to its standard design.

The other most common style found is National Folk. Several National Folk homes are found west of Clarendon Road. Key characters of the National Folk style, include simple massing, usually front or side gabled roofs, and uniform roof heights. Buildings are usually clad in horizontal clapboard siding, with ample front porches and vertically proportioned windows. This style represents an interpretation of traditional local housing types utilizing mass-produced materials transported from other parts of the nation. As such, this style exhibits some geographic variations. In Avondale Estates the National Folk style serves a basis for the older pre-dating the Tudor Village; they are found north of Avondale Road and west of Clarendon Avenue, with other styles manifesting themselves through details.

The architecture of most other buildings in the Study Area is generally unassuming and functional. A handful of 1950s Modern commercial buildings, notwithstanding, most commercial buildings are single-use, one story tall prototypes lacking any detailing or reflection of the area's history. Their horizontal scale fails to provide for mixed-uses and results in every building being an object unto itself, with no compatibility with adjacent uses. They are also built to accommodate the automobile, and not the pedestrian.

Industrial buildings are predominantly one and two-story concrete block or brick structures with flat roofs. Doorways are small and generally uninviting. Most have little value for anything other than industrial uses, but a few of the better built ones may lend themselves to conversion into creative retail or office space. In other parts of the Atlanta region the "industrial chic" aesthetic has proven popular and marketable, most notably along Zonolite Road or Howell Mill Road. This is already occurring to a limited extent in the Study Area, where two new multifamily buildings build upon the industrial aesthetic.

Strengths

- Tudor Revival buildings give identity to Avondale Estates
- The remaining historic homes west of North Clarendon Road provide a sense of Avondale Estates' pre-Tudor heritage



A functional, single-story industrial building typical of the Study Area

Weaknesses

- Most existing architecture is unappealing and creates no sense of place
- Disconnected buildings disrupt the continuity of the Avondale Road and make the Study Area appear fragmented

Opportunities

- Many buildings are marginal and of little architectural value, meaning potentially less resistance to their replacement
- National Folk could be used in future development
- The Tudor style could be replicated in new development
- The large amount of existing industrial architecture may lend itself to building up on the “industrial chic” aesthetic
- New zoning requirements could ensure quality development

Threats

- The deterioration or unappealing architecture of even one individual lot can detract from the area
- Chain stores could continue to erode Avondale Estate’s historic character unless their facilities are custom designed to fit in
- An aversion to economically viable residential densities could discourage the development of quality architecture by forcing builders to utilize lower-quality materials in order to gain an acceptable economic return



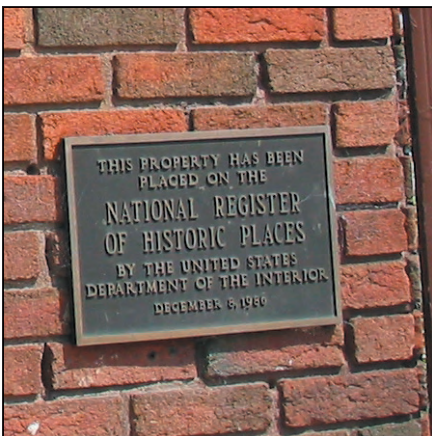
In nearby Decatur, former auto-oriented buildings have been converted into chic retailers



These historic commercial structures in Charleston create a pleasant streetscape



Part of the reason for downtown Decatur's success is the city's strong historic preservation ethic



The Tudor Village is a nationally registered historic structure

1.7 HISTORIC STRUCTURES AND RESOURCES

Overview

Historic structures are key community resources that must be preserved and protected. In this day of increasingly homogenous cities and towns, historic buildings have become critical to preserving local identity and sense-of-place. Not only does the preservation of historic structures preserve an architectural legacy, it also preserves the buildings and places that represent a community's collective memory.

There is also an economic benefit to preservation. Towns and cities around the country have found that the best way to promote future growth is by preserving the past. This is particularly true where historic buildings are of a quality that is financially-prohibitive today. The National Trust for Historic Places identifies tourism of historic site - called "cultural tourism" - as a key component to successful downtown revitalization. For example, in Athens, the Historic Preservation Division of the Georgia Department of Natural Resources reports that tourism resultant from the unique scale and history of the city brought in over 123 million dollars in 1994, and over 134 million dollars in 1995 (website).

Cultural tourism aside, "place-oriented" retail has become one of the industry's hottest commodities, with a number of new "downtowns" under construction across the nation. In the Atlanta area, these places include Atlantic Station, Downtown Smyrna, Woodstock, and Vickery. Given this strong demand, downtowns with "real" history should position themselves to capture this growing retail market.

Existing Conditions

Downtown Avondale Estates was originally developed in the late 1800s as "Ingleside," a small settlement oriented towards the railroad; this early settlement pattern is evident through the area's grid of streets. Just twelve structures from "Ingleside" remain (please see Historic Resources map for locations), and most are in a state of disrepair. Today, however, Avondale Estates is primarily known as a planned community dating back to the early twentieth century. In 1924 George Willis developed the "English Village" that is now the city's hallmark. In 1986, approximately one-third of the town's acreage was placed within the Avondale Estates Historic District and listed in the National Register of Historic Places. Downtown is located within the northern portion of the Historic District.

Only two commercial buildings downtown are of historical significance in the context of the city's early development. The oldest building,



The movie theater at the western edge of the Tudor building is now a recording studio



This historic "Ingleside" home on Maple Street is falling apart



This mature oak provides sense of longevity and stability

Hairston's store, is located along Avondale Road, west of Center Street, and was built in 1908. It is a simple, two-story brick commercial structure with an altered storefront. To its east are buildings from 1925-1926 that epitomize Avondale Estate's Tudor style. The western-most building contains an old cinema. The Georgia Historic Preservation Division has identified Both the Hairston's building and the Tudor buildings as "contributing structures" to the Historic District that are worthy of preservation. Across the street, the clock tower and trolley median serve as landmarks. The clock tower was constructed in the 1970s.

There are also historic residential structures downtown. A home located on Franklin Street next to the Post Office was built in 1903 and is alleged to be the city's oldest home. Several other older homes exist as well, but most have been altered. As a result, most of the Historic District's homes can be found in the large residential area to the east and south of downtown. Here, the architecture includes an array of English themes and related eclectic styles, as well as several amenities typical to "garden city" type planned communities.

Although not often thought of as "historic" by most, the Study Area includes several early Modern buildings built after World War II. These buildings are now 50 or more years old and are eligible for inclusion on the National Register of Historic Places. With time, their unique style will likely be ever more appreciated.

In 1996, the City adopted a local preservation ordinance under the Georgia Historic Preservation Act, providing local protection that national recognition does not. This was supplemented by the adoption of the Avondale Estates Urban Design Guidelines that same year. From the perspective of downtown, its incorporation into the Historic District has significant ramifications, as the Historic Preservation District Ordinance affects decisions regarding the replacement or modification of buildings.

Vegetation can also have cultural significance to a community. In the case of Avondale Estates, several mature oak trees are sporadically found throughout Downtown, and may require regulatory protection for their preservation. The abelia hedge and other landscaping located within the 1,500 foot long, 15 feet wide median dividing North and South Avondale Roads may also be of preservation significance to the community.

Strengths

- Twelve remaining historic structures from "Ingleside"
- Two remaining early Tudor structures
- 24 early Modern buildings from 1945-1954
- Avondale Estate's history as a planned community, as well



This new loft building attempts to build upon downtown's railroad town heritage



Nation-wide, buildings from the 1950s, such as the one housing Jack and Jill, are starting to be appreciated for their historic value

as the surviving original town plan, may provide support for the use of planning as a revitalization tool

- The clock tower and Tudor Revival buildings are identifiable elements for the community

Weaknesses

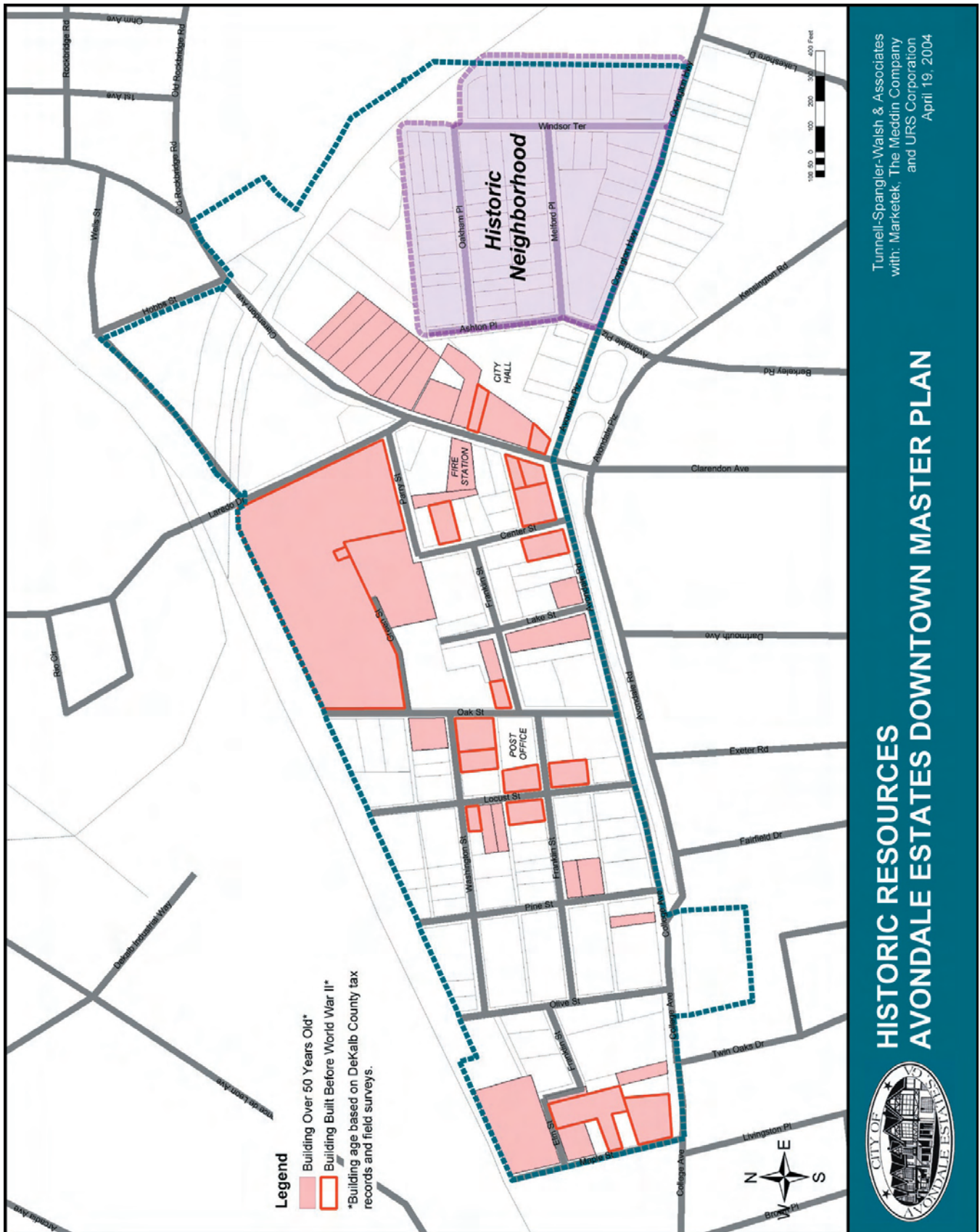
- Several remaining homes from “Ingleside” are adulterated or dilapidated to the point of being beyond saving.
- Only a few downtown buildings are of the degree of historic significance that generates strong community attachment and roots. Thus, capitalizing on a large existing historic base as a destination draw is not particularly feasible.

Opportunities

- The lack of attachment to the majority of existing structures can be a benefit when attempting to reposition an area
- Downtown's two historic precedents, the “English Village” and the Southern railroad town, present opportunities for revitalization themes
- Many early Modern buildings are now more than fifty years old and their protection and preservation is increasing nationwide; they are likely become more valued for their historic character in the future

Threats

- The Tudor Revival facade, while creating an identity, may not be part of the optimal solution for revitalizing downtown. This may create a conflict of values and recommendations for change.
- Avondale Estates' history as a planned garden suburb focused strongly on the town's single-family residential aspect. This heritage may lead some to favor a bedroom community approach and reject plans that promote a strong mixed-use core.





Most buildings in the Study Area are in Standard condition



This Maple Street home is in Dilapidated condition

1.8 BUILDING CONDITION

Overview

A key factor in determining the revitalization and historic preservation opportunities of an area is the physical condition of buildings within it. There are four categories in which all buildings can be classified, including:

- **Standard**, a building in good condition and needing few, if any, repairs.
- **Substandard**, a building in moderate condition and requiring some general repair.
- **Deteriorated**, a building requiring one or more major repairs, such as a new roof, foundation, siding or windows.
- **Dilapidated**, a building with significant structural problems and representing a public health threat.

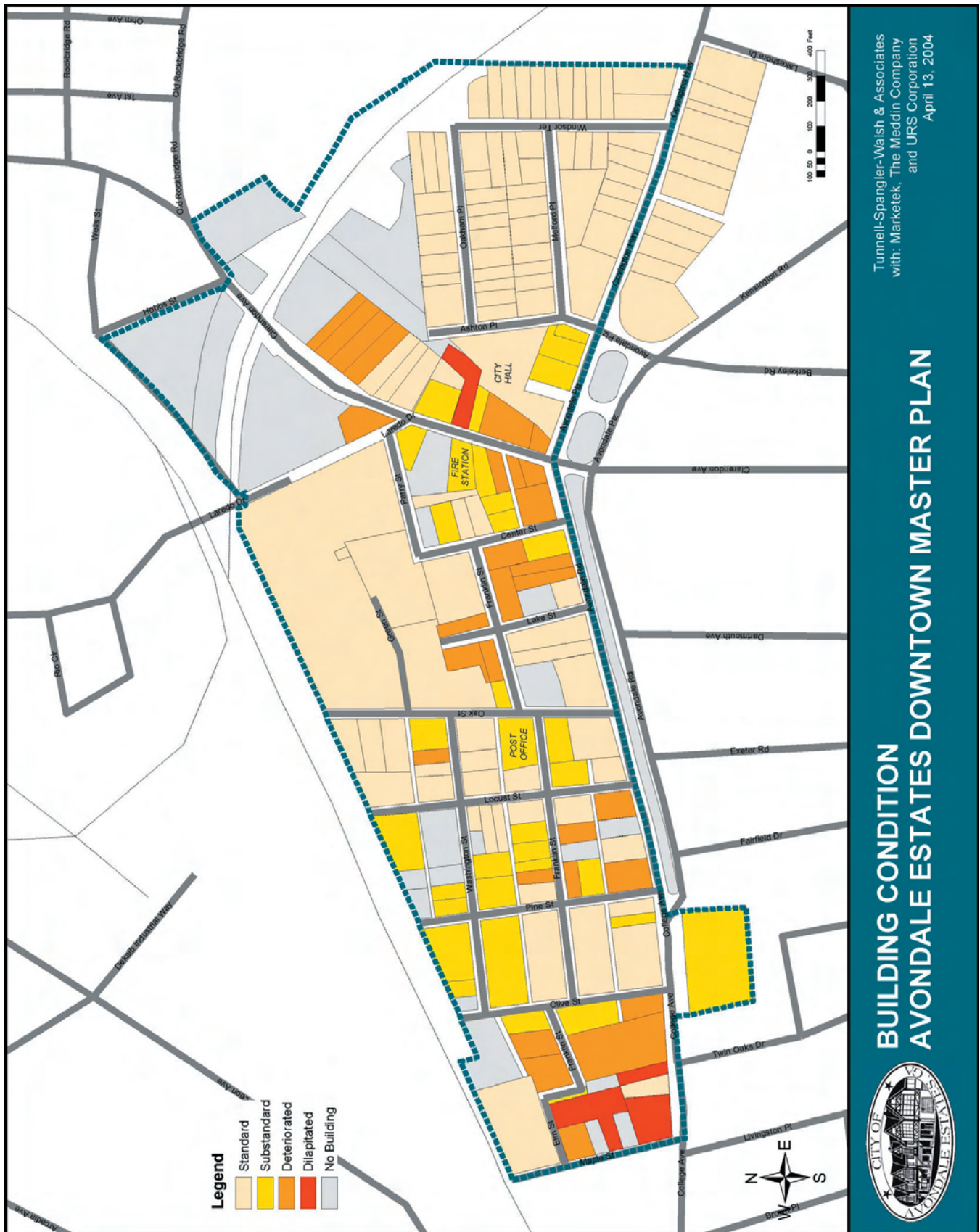
Each category is based on exterior conditions. A determination of final condition requires both interior and exterior review.

Existing Conditions

A windshield survey of the Study Area found that most structures are in good condition. The chart below shows the distribution. Geographically, the greatest degree of building deficiencies is found in the Study Area's west portion, west of Olive Street. There is also a concentration surrounding the Tudor Village. The map on the following page shows the distribution in more detail.

	Parcels		Lot Area	
	Number	% Parcels	Acreage	% Total*
Standard	96	50%	44.8 ac.	49%
Substandard	35	18%	13.0 ac.	14%
Deteriorated	29	15%	9.8 ac.	11%
Dilapidated	4	2%	2.2 ac.	1%
No Building	28	15%	22.3 ac.	25%

**Percent of total lot area (92 acres). Does not include streets or other rights-of-way.*





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



These townhomes in North Carolina have small shops at ground level



Industrial land uses are prominent in Avondale Estates' downtown

1.9 LAND USE AND LAND USE REGULATIONS

Overview

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

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

Existing Land Uses

Downtown Avondale Estates exhibits a wide mix of uses, including residential, commercial, service, industrial, and civic uses. However, the type, proportion, condition and arrangement of these uses is not particularly hospitable to the creation of a desirable, vibrant downtown core.

The largest land use category in the Study Area is Single-Family Residential. This occurs primarily to the east of Clarendon Road, in the neighborhoods fronting Ashlton Place. These uses are close to, but separated from other uses by the lack of direct connections to the core. The Single-Family Residential land uses west of Clarendon Road are hold-outs from the area's past; most homes have been converted to offices in this area. This land use represents an important housing option, but is limited in its appeal.

The second most prevalent land use is Industrial/Construction, with this use prevalent in the northern and western sections. Industrial uses create the perception that the area is a "no-man's land" and are a challenge to revitalization. Auto Repair/Service is another land use that contributes to this.

Retail and Restaurant land uses are primarily clustered along Avondale Road in the Tudor buildings and just to their west. However, these are intermixed with service and industrial uses, and are of too little mass and concentration to create a destination.



Typical auto repair and service enterprise



The Post Office is a high traffic municipal facility



A single-family home has been converted to offices on Locust Street

Land Use	Acres	Percentage*
Single Family Residential	25.4	21.2%
Multifamily Residential	2.5	2.0%
Retail	4.7	3.9%
Restaurant/Bars	2.3	1.8%
Offices	7.7	6.4%
Mixed-Use	0.9	<1.0%
Public	3.6	3.0%
Parks	3.9	3.3%
Auto Repair/Service	5.4	4.5%
Parking (principal use)	1.7	1.4%
Industrial/Construction	25.2	21.0%
Streets/Transportation	21.1	17.5%
Vacant Buildings	2.8	2.3%
Vacant Land	12.8	10.7%

*Percent of land area. Sum may not equal 100% due to rounding.

Downtown is home to several municipal uses, including City Hall, US Post Office, DeKalb Fire Station #3, and the Department of Public Works. As such, Public land uses account for three 3.0% of the Study Area. The City Hall and Post Office uses are positive elements due to their ties and interaction to the community. The latter could be a candidate for moving to a more prime location.

Downtown has few vertical Mixed-Use land uses. Those that do exist are found in the Tudor Village and in a live-work unit on Elm Street. These could serve as models for future mixed-use areas. It also has very little quality, owner-occupied multifamily residential. This limits the appeal of downtown to singles, empty-nesters, and childless couples, all of which are driving downtown revitalization nationwide.

Perhaps the most striking characteristic regarding land use is the large amount of underdeveloped, Vacant Land, Vacant Buildings, or Parking. These three uses represent 14.4% of downtown's total area. In some cases, these parcels appear to be used as repositories for junked/damaged vehicles, ad hoc parking lots, or for storage of overflow materials from industrial operations.

Strengths

- Mixture of land uses
- Proximity of land uses



The lot at right is used for truck parking

- Single-family residential areas within and near the Study Area

Weaknesses

- Lack of a concentration of retail use
- Industrial and automobile uses create a negative aesthetic image
- Horizontal segregation of uses
- Lack of quality, owner-occupied multifamily options, which limits the market appeal of downtown and discourages retail
- Noise from trains and existing industry may limit use options along northern edge of downtown

Opportunities

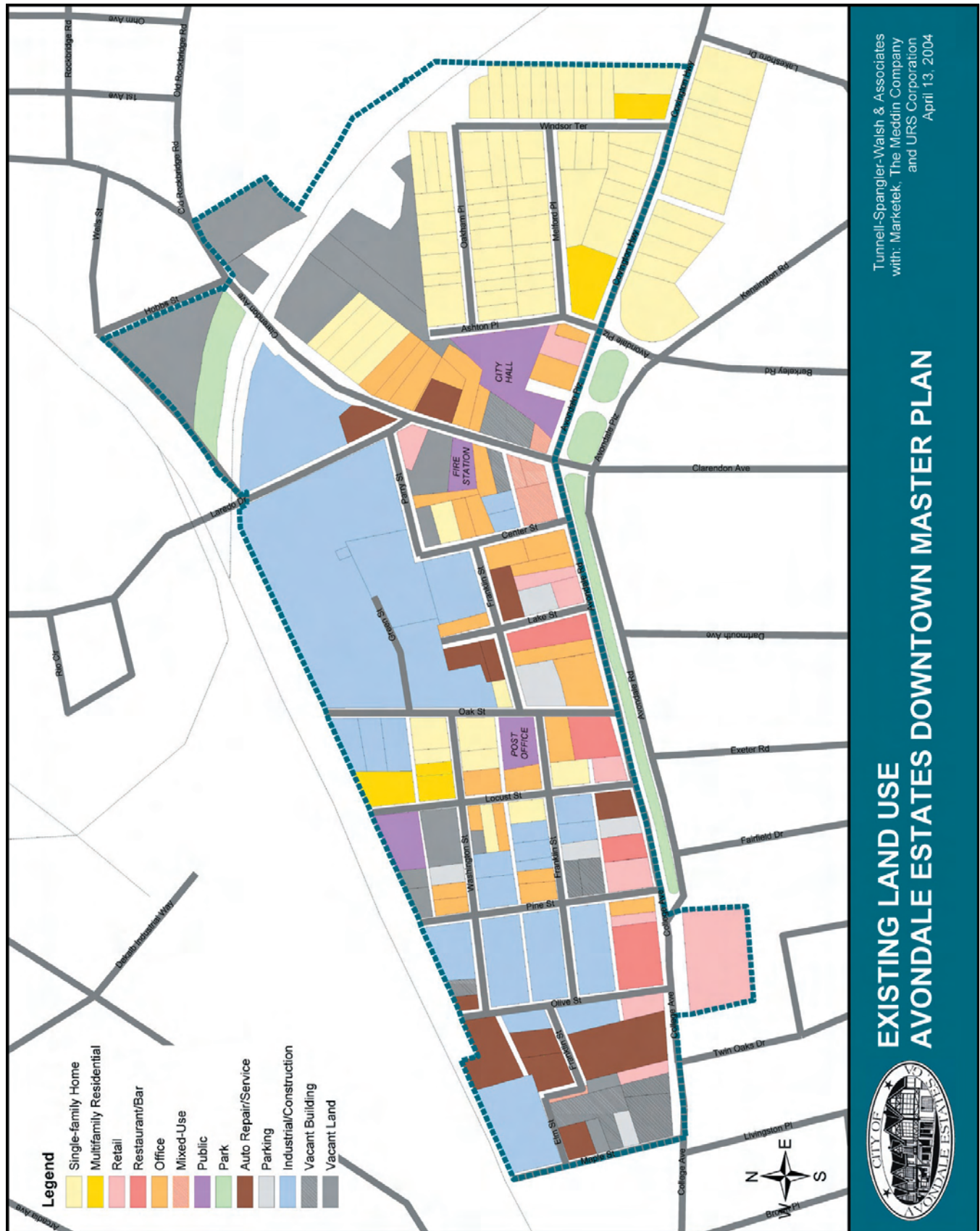
- Introduction of more appropriately-scaled, quality, owner-occupied multifamily Residential, Retail, Restaurant, Park, and Mixed-Use land uses
- Use of the Tudor Village as a model for new growth
- Large amount of property available for revitalization

Threats

- Zoning, which discourages or outlaws mixing uses
- Existing industrial/automobile service property owners who may want to stay in current locations
- Land speculators, who may see land as more valuable than it is, therefore discouraging development while they “sit on” their land
- Bad design, which could reduce local support for new land uses in the Study Area



One the few examples of a mixed-use facility (combination home and work studio)





This photo shows residential and industrial in close proximity on Oak Street



The Land Use Plan supports commercial uses along North Clarendon Avenue



The Land Use Plan supports residential preservation

Future Land Use Classifications

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

The City of Avondale Estates currently operates under the 1998-2017 Comprehensive Land Use Plan approved by the Georgia Department of Community Affairs (DCA) in 1998. The city adopted an update to the plan in 2000, providing to the DCA and the ARC with a status report of the projects contained in the Plan's 1999 - 2003 Short Term Work Program.

The Comprehensive Plan does not provide projections of future land use, as "no significant changes in land use acreage by category is anticipated" due to the city's "built-out" nature. The Land Use Plan does, however, depart significantly from existing land uses - it restricts Industrial uses to adjacent to the rail lines. Commercial land uses are concentrated in the Tudor Village and along North Avondale Road. The Plan also shows Transportation/Communication/Utilities east of North Clarendon Road, and Residential in the Study Area's eastern neighborhood.

Special attention is given to retail functions of Commercial land uses. The Tudor Village is envisioned as a specialty retail core. Additionally, it calls for businesses across downtown that serve residents, are limited in size and scale, and respect the traditional small business orientation of Avondale Estates.

Strengths

- Mixture of land use classifications within downtown
- Policies preserving single-family neighborhoods

Weaknesses

- Lack of a Mixed-Use classification

Opportunities

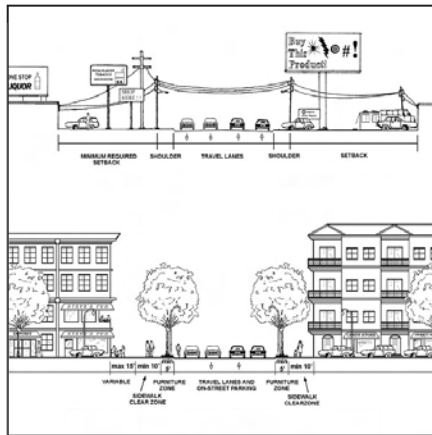
- Creation of a classification to support revitalization

Threats

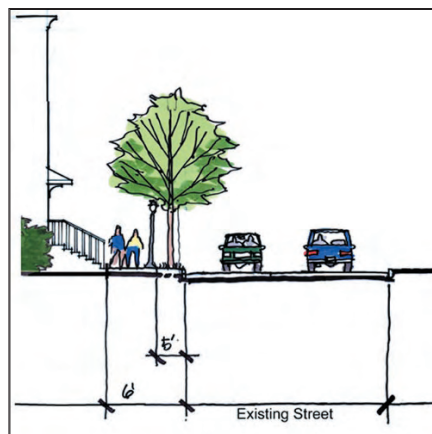
- Resistance to change



Discouraging shared parking through zoning is detrimental to the creation of a successful retail district



Zoning can transform an area over the long-term



Zoning can require wide sidewalks and pedestrian-oriented buildings

Zoning Designations

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

Most of the Study Area is zoned the Central Business District Zone (CBDZ). This is a mixed-use district supporting a business and government center. It encourages the development of the area as a shopping, dining and activity center for residents and the visitors. It also reinforces small town architecture and character and promotes pedestrian access. It does not, however, allow housing, except when located on the second floor or above in a multiple use building.

The current CBDZ code has minimum lot sizes and widths and setbacks that are inconsistent with the historic form of the Downtown. Lots must be 20,000 square feet and 100 feet wide. The buildings must be set back 40 feet on arterials and 30 feet on collectors. It also lacks strong design controls. Retail parking ratios under CBDZ are five spaces per 1,000 square feet, which is high for a small town environment. Restaurants are one per four seats (plus one space per two employees). This is difficult to administer and may warrant revision to a ratio based on floor area. In general, shared and off-site parking is not allowed without a variance.

Strengths

- CBDZ supports downtown as a retail center
- CBDZ permits certain residential uses
- Historic District review provides certain design compatibility

Weaknesses

- Lack of design requirements within the zoning code
- Parking regulations
- Overabundance of commercial zoning

Opportunities

- Revisions to CBDZ
- Sidewalk and connectivity requirements

Threats

- No change to zoning



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



Local Streets, such as Washington Street, are typically 26 feet wide



When not congested, North Avondale Road is subject to speeding

1.10 VEHICULAR SYSTEMS

Overview

Traffic operations are affected by a variety of factors, including intersection operations, light timings, turning movements, volume, capacity, and speeds. The interface of these different components affect each other and define the ability of the whole system to operate efficiently and as part of a well-balanced system.

The organization of streets also directly impacts the ability of the traffic system to operate efficiently. An interconnected system is inherently superior to a dendritic system from a traffic point of view. Two two-lane streets in a network can carry more vehicles than one four-lane street. They also result in shorter trips, fewer turns, short signal phasing, and less clearance time. Additionally, by providing more, narrower streets, transportation systems provide more routes of travel and reduce the likelihood that the entire system will be thrown into paralysis by an accident or other event.

Roadway Operations

Study Area streets can be divided into two types: collector streets or arterial streets: North Avondale Road and North Clarendon Avenue; and local streets.

North Avondale Road and North Clarendon Avenue: These streets are dominated by under-capacity peak hours and over-capacity off-peak hours, with resultant speeding problems. Both also have a high curb cut density, which creates safety problems for drivers and pedestrians. North Avondale Road's typical section is 53 feet and four inches curb to curb, including four travel lanes and a center turn lane; daily it carries 8,541 eastbound cars and 10,418 westbound cars. North Clarendon Avenue's section varies from 45 feet at Avondale Road, to 38 feet at Laredo, to 31 feet at Hobbs Street.

Local streets: Unlike the collectors and arterials, the local streets function well. Most range in width from 24 to 26 feet. The exception to this is Oak Street, which is 38 feet six inches wide. Those east of North Clarendon Avenue vary in width from 21 feet six inches on Windsor Terrace to 24 feet on Oak Oakham Place.

Strengths

- Interconnected/grid street system
- Most streets are narrow



Oakham Place is a quiet residential street



This intersection balances vehicular, pedestrian, and bicycle needs



The Laredo Drive/North Clarendon Avenue intersection is skewed

Weaknesses

- Arterials and collectors are over-capacity at off-peak hours and under-capacity at peak hours

Opportunities

- Street-oriented buildings can psychologically narrow the street and reduce speeds in off-peak hours
- On-street parking could support retail and calm traffic on local streets
- Heavy commuter traffic on Avondale Road and Clarendon Avenue can be market opportunity
- The possible Avondale Bypass could reduce peak hour congestion on North Avondale Road over the long-term and support its narrowing, if such was removed from the State network

Threats

- North Avondale Road's State Route status may limit necessary changes

Intersections

There is only one major intersection in the Study Area, North Avondale Road and North Clarendon Avenue, and it is signalized. There are several smaller intersections, which are signalized, including Clarendon Avenue and Avondale Plaza, North Avondale Road and Pine Street, North Avondale Road and Olive Street, and North Avondale Road and Oak Street. Their signalization includes left turn arrows and is adequate and well timed.

The key intersection of Laredo Drive and North Clarendon Avenue is not signalized; it also has an unusual geometry. Field visits did not suggest the need for a signal however, as turning movements seemed to flow with ease in all directions. Over the long-term the intersection could be realigned to promote greater safety.

Strengths

- Existing signals

Weaknesses

- Challenging North Clarendon Avenue/Laredo Drive geometry

Opportunities

- Realigned intersection at North Clarendon Avenue and Laredo Drive



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



Center Street's character is more alley-like than street-like



Narrow streets can support attractive residential uses

Street Character

A street's character is defined by bicycle, pedestrian and vehicular systems, as well as their relationships to land uses and buildings. At the same time, the character of the street has a direct impact on its ability to foster certain land uses and transportation modes. For example, a wide, high-speed street with narrow sidewalks and buildings set back from the street will support nothing more than automobiles as the primary means of transportation, while similar land uses and buildings pulled closer to a low-speed street with wide, shady sidewalks is conducive to walking, transit, and bicycle use.

On North Avondale Road businesses dominate, with the exception of the section east of Lake Street. This streetscape is an auto-centric commercial strip that does not reflect the historic character of Avondale Estates. Downtown, the road has two features that differentiate this portion from the rest of this long state route. The abelia hedge on its south side is aesthetically pleasing and a welcome change from the visual clutter. It does, however, create a barrier to the south. The second feature is the Tudor Village and historic homes, which gives interest and a break in the strip monotony. North Clarendon Avenue has the same discontinuity as North Avondale Road, but is dominated by nondescript industrial and service businesses.

Moving away from North Avondale Road the streets transition to an almost rural feel, with a variety of small buildings. The dominant aesthetic, especially in the west, is one of the "messiness" associated with auto repair (grease stained pavement and parking lots, junked/damaged vehicles, noise, large bays, etc), and of a light industrial area. Eastern streets have a pleasant residential character.

Strengths

- Pedestrian-friendly residential streets

Weaknesses

- North Avondale Road is almost completely auto-oriented.

Opportunities

- Redevelopment opportunities will allow for making streets more pedestrian-scale and tamer for all modes of travel.

Threats

- GDOT coordination will be required to insure that the proposed roadway sections are allowable under current guidelines. If not, guidelines may need to be changed.
- Designing streets with amenities for travel other than simply motor vehicles may require education within the community to gain consensus.



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

1.11 TRANSIT FACILITIES

Overview

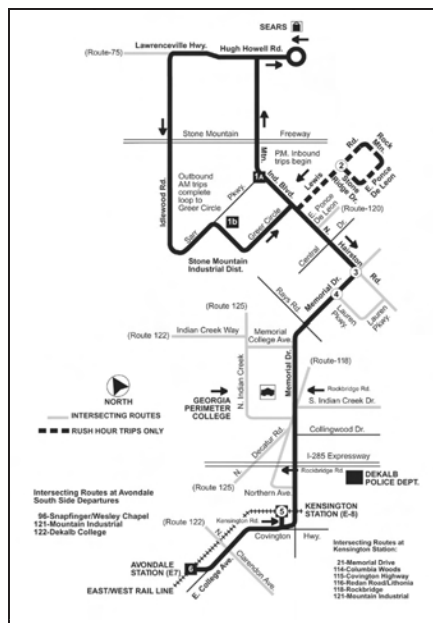
Providing transportation choice is a major tenet of smart growth. Transit provides an alternative option of getting to work, school, shopping, and other community services for those with cars, and serves a critical transportation need for those without. It also supports pedestrian friendly, mixed use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

Transit becomes attractive to a variety of users when it is: frequent, accessible by walking, biking and vehicle; and near shopping and other conveniences. Therefore, it is important that land uses, pedestrian, and vehicular systems work in unison to support transit.

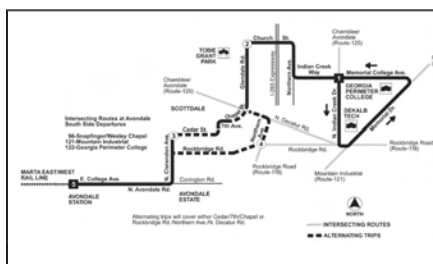
Existing Conditions

The Study Area is well served by transit. Two MARTA bus routes serve it:

- **121: Mountain Industrial:** The majority of this route runs to the north of Study Area, impacting only Avondale Rd. The route travels roundtrip from Mountain Industrial Boulevard in the Stone Mountain area to the Avondale MARTA Station, crossing Stone Mountain Freeway, traveling along Memorial Drive and then Covington Highway to the rail station. The Avondale Station connects to an additional eight bus routes. The full route 121 travel time is approximately 45 minutes. This route also stops at the Kensington Marta station, east of the Avondale station, which connects to five additional bus routes.
- **122: Georgia Perimeter College:** This route generally runs to the east of the Study Area, traveling roundtrip from Georgia Perimeter College and DeKalb Tech to the Avondale MARTA station. It covers portions of Clarendon Avenue and Avondale Rd. in the Study Area. Travel time for the one-way route is approximately 22 minutes.



Mountain Industrial MARTA Bus Route 121.

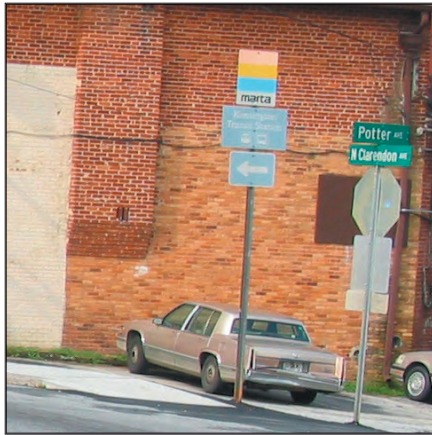


Georgia Perimeter College MARTA Bus Route 122.

The Study Area is also located between rail stations on MARTA's east-west rail line. To the west, the Avondale MARTA station is at College Avenue and East Ponce de Leon Avenue. Its location one mile west of the Tudor Village unfortunately makes it an impractical walking option for the downtown. The Avondale station holds 1,095 parking spaces. One mile to the east is the Kensington rail station. With 1,934 parking spaces, the Kensington station is more of a commuter station than the Avondale station. Travel time from the station's to Five Points Station in Downtown Atlanta is between 15 and 18 minutes, with train frequency ranging from ten minutes on



MARTA rail runs along northern edge of Study Area, but does not stop in it.



MARTA sign on Clarendon. Is this a bus route stop as well?

weekdays to 15 minutes on weekends.

Both stations are undergoing redevelopment into a transit-oriented developments. The Avondale station's plan includes 292 proposed units on and 23,000 square feet of neighborhood-serving retail space. The Kensington station area is planned for redevelopment into a higher density, mixed-use development including over 4,000 units of housing and 200,000 square feet of retail.

An odd situation for Avondale Estates is that the MARTA rail line route runs on a track rimming the northern edge of the Study Area, yet there is no access to these trains here. In addition, a MARTA bus lot is located just to the north of Downtown. Numerous buses use Avondale Road and Clarendon Roads to access this lot, yet do not provide the community with service.

Transit users usually rely on connections with other modes to make their trips. If these connections are inconvenient or uncomfortable, transit use may be discouraged. There is currently poor sidewalk and waiting area conditions along the transit stops in the Study Area, including a lack of bus shelters, bicycle parking, and schedules. Stops on North Avondale Road are few and far between, making it difficult to find a convenient bus stop. Even so, the vast majority of the downtown is within a 1,200 feet radius (a five minute walking distance) of the existing bus route stops on Avondale Road and North Clarendon Avenue. Thus, an opportunity exists to integrate more efficient, customer oriented transit and transit support measures into the Study Area's development.

Strengths

- Existing bus service via routes 121 and 122
- Proximity to rail stations

Weaknesses

- Lack of bus shelters and a quality pedestrian experience limits transit's viability
- Existing MARTA stations are too far for walking



Bike lanes can make cycling safer on commercial streets



PATH's Stone Mountain Trail serves the northern edge of Downtown



When there are no bicycle racks cyclists will use what is available

1.12 BICYCLE FACILITIES

Overview

Bicycles are an increasingly important means of transportation. A balanced transportation system must include bicycle facilities to ensure a range of mobility options. Such can take two major forms.

Off-street facilities are generally ten to twelve feet wide paved areas that permit travel in two directions. Lanes may or may not be striped. Usually, these facilities are built in conjunction with greenways.

Bicycle lanes are striped one-way on-street facilities. They are located next to the curb so bicyclists move in the same direction as traffic. In Georgia, bicycle lanes are required to have a minimum width of five feet if they are designated as such. It is possible, however, to stripe narrower widths, provided they are not designated. Lanes are necessary on streets with vehicular speeds greater than 25 miles per hour. On slower streets bicyclist can ride safely with traffic.

Existing Conditions

Bicycle facilities are virtually nonexistent in the Study Area. However, there is a PATH trail north of the Study Area that crosses North Clarendon Avenue and extends into Downtown's northern edge.

Strengths

- The compact size of Downtown and its proximity to residential areas make bicycling an attractive travel option
- Streets north of North Avondale Road are gridded and with low volume, creating conditions favorable to bicyclists
- Existence of the PATH multi-use trail

Weaknesses

- North Avondale Road is hostile to bicyclists
- Lack of bicycle racks

Opportunities

- Extending the PATH trail could bring bicycle access to the Study Area and areas south
- Bike lanes could be put on North Avondale Road if the possible Avondale Bypass is built

Threats

- Changes to North Avondale Road will be challenging as long as it is a GDOT route



With its high ceilings, wide sidewalk and inviting storefront, this Decatur business' design is near perfect



The "Tudor Village" is the most well known portion of Downtown



North Avondale Road's one-sided nature limits its commercial potential

1.13 RETAIL ENVIRONMENT

Overview

Numerous studies have identified physical elements that support a successful walkable (as opposed to auto-oriented) retail environment. These involve building layout, character, storefront design, signage, etc. In general, ten principles can be defined; these principles are shown below.

General Spatial Configuration

One of the most important attributes of a successful pedestrian-oriented retail district is a logical, continuous circulation route fronted by storefront retail uses. Double sided retail streets with a distance of 1,000 feet from end to end are most successful because they allow shoppers to make a complete loop, passing all retailers and returning to their starting point at the end; easy street crossing are essential to this. Single-sided streets or double sided streets that are difficult to cross are less successful.

With the exception of North Clarendon Road, Downtown lacks a continuous, double-sided retail experience. Parking lots, blank walls, separated buildings and difficult-to-cross streets all limit the retail viability. In addition, missing sidewalks and pedestrian-hostile streets ensure that a viable retail environment cannot be created without changes.

10 Principles for Successful Walkable Retail

1. Create a continuous and cohesive area.
2. Light the way.
3. Keep sidewalks basic, smooth and clean.
4. Design for three distinct sidewalk zones.
5. Provide adequate parking, including on-street spaces.
6. Pick the perfect street tree.
7. Think of public art in a different way.
8. Pump the right kind of traffic into downtown.
9. Move cars at 25 mph or less.
10. Establish a wayfinding program.



Parking behind the Tudor Village

Tudor Village

From a physical perspective, the Tudor Village incorporates several positive elements. These include an identity (in this case, Tudor Revival) on the building facade that draws attention and creates uniqueness from other commercial areas, as well as diagonal on-street parking, which does not only allows easy access, but provides a buffer for pedestrians from traffic along North Avondale Road. Other positive aspects include: a sidewalk capable of handling two people abreast (although one does have to dodge the lightpoles); adequate and human-scaled lighting; and entrances located on the sidewalk.

The Tudor Village lacks in other areas. The dominance of the Tudor styling somewhat overshadows the identity of individual stores and tends to be too dark and oppressive for commercial use. This is aggravated by storefronts that do not cover a large enough area of the facade; are highly fragmented; are blocked by planters in areas; and are poorly merchandised. The existing service and professional offices also fail to create visually interesting “window shopping” scenarios. These firms employ blinds and shades to mitigate the advantages of a glass facade.

The pedestrian experience also needs improvement. Sidewalks lack street trees, benches, and other areas for resting. Only a few small awnings exist to protect against the elements. The on-street parking, which buffers pedestrians from traffic, also has some limitations. Its location on an arterial may prevent some from using it due to difficulty in exiting. Thus, many may be using the parking behind the Tudor Village, which is inhospitable.

Uses in the Tudor Village also do not support a vibrant commercial core. The amount of retail is too small to generate the critical mass needed. Pedestrians are rare, and businesses are generally only open from 10:00 am to 5:00 pm, even though most potential consumers are not likely to visit until early evening. Finally, the quality of space is poor and in need of improvements.

Other Areas

In general, other retail areas have none of the advantages of the Tudor Village. Where sidewalks exist they are narrow and too close to the street for a feeling of comfort or security. The buildings are disconnected, setback from the sidewalk, and dominated by curb cuts and frontal parking (along North Avondale Road and North Clarendon Avenue, in particular). Signage is also a problem, and contributes to the feeling of a commercial strip rather than a downtown.

Another challenge is that the scale, density and type of retail activity



Typical physical environment of other retail establishments in Downtown



One of the few eating establishments in Downtown



These flowers contribute to the retail ambiance in front of La Piccolina



Looking through the window of the now vacant Avondale Pharmacy on North Clarendon Avenue

is limited, and does not generate foot traffic. Businesses are scattered and the pedestrian experience fragmented. The attributes found in environments that promote and support street retail: food/dining/entertainment use options; safe and pleasant places to rest; people watching opportunities throughout the day and evening; and visually interesting scenery; are, for the most part, lacking. As a result, Downtown is currently a collection of uses rather than a cohesive district; this limits its potential retail drawing power.

There are, however, strengths in other parts of Downtown that the Tudor Village lacks. The availability of free parking is perhaps the strongest positive factor, even though parking is largely uncoordinated. Most structures are also in much better physical condition than the Tudor Village. A final advantage is that a large amount of vehicular traffic traverses through its arterials. Cars represent possible customers, but could also be a liability unless it becomes safer for them to stop and park.

Strengths

- Character of the Tudor Village
- Beautification efforts by individual businesses
- Existing street trees on key streets

Weaknesses

- Fragmented pedestrian retail environment
- Uncoordinated parking facilities
- Auto-oriented signage represents visual blight
- No natural retail circuit

Opportunities

- Drive by traffic represents potential customers
- New street-level retail could fill in retail gaps
- Retail could be concentrated rather than spread out

Threats

- Unsafe traffic conditions could perpetuate a user-unfriendly district



Residential and retail market areas for Downtown Avondale Estates



New development in Downtown Decatur, the western portion of the local retail market area

1.14 MARKETS

Since its development as one of the nation's first planned communities, Avondale Estates has maintained its position as a quaint, historic community with a handful of neighborhood serving retail businesses. As Atlanta's intown and close-in neighborhoods continue to gain in popularity, fueling the revitalization of neighborhood business districts, Avondale Estates is well positioned to capitalize on this growing trend. The market analysis is designed to not only estimate potential demand for new housing and retail uses in the Study Area but also identify businesses and housing types that have the greatest likelihood of success as well as compliment and preserve the character of Avondale Estates.

The retail and residential market areas delineated for this research are based on drive time estimates, geographic and man-made boundaries and the location of existing competitive supply. The residential market area is comprised of a ten-mile radius from the core of the Study Area (defined by the intersection of Avondale Road and Clarendon Avenue). The retail market area is divided according to a local and a greater market area. The local retail market area includes the population within a five-minute drive from the core of the Study Area, who will rely most heavily on Avondale Estates for convenience related goods and service. The greater retail market area (defined by a larger ten-minute drive) will attract customers of a wider variety of business. Both the retail and residential market areas are defined as the geographic areas from which the large majority of potential customers of retail establishments or residents of new housing developed in the Study Area originate.

Existing Conditions

The demographic profile supports Avondale Estates' reputation as a relatively affluent and older community. In 2003, the estimated median age of residents of Avondale Estates is 42.4 years with a

	1990	(est) 2003	% APR	(forecast) 2008	% APR
Avondale Estates					
Population	2,422	2,620	0.63%	2,739	0.91%
Households	1,157	1,226	0.46%	1,289	1.03%
Local Retail Market Area					
Population	68,957	81,692	1.42%	86,645	1.21%
Households	27,834	31,710	1.07%	33,928	1.40%

APR = Average Annual Percentage Rate



Children and the elderly benefit the most from walkable communities



The local trade area includes free standing businesses, like this Waffle House



Retail should occur in a mixed-use setting

median household income of \$73,566. While the retail and residential market area populations are older (the median age ranges from 32.8 years to 33.2 years) and less affluent (\$44,462 to \$51,567 median income), they are more in line with the Atlanta MSA and state populations. Between 2003 and 2008, population growth in the retail and residential market areas is expected to be moderately strong (1.15% to 1.62% annually) but behind MSA and state levels.

Market segmentation data reveals that retail market area households generally have active, urban lifestyles, may own or rent their homes, and have moderate and above average incomes. While a large share of these households are younger, single, and childless, many are slightly older with children at home.

Retail development within the retail market area ranges from ubiquitous strip development to weakening enclosed malls to thriving neighborhood business districts. A survey of shopping centers in the immediate vicinity of the Study Area reveals older centers with lease rates that range from as low as \$2 per square foot/(NNN) to \$18 per square foot/(NNN). Retail uses in the Study Area are primarily concentrated on North Avondale Road, west of Clarendon Avenue, and are a collection of free standing businesses, one shopping center and Tudor Village. Lease rates at the shopping center and Tudor Village reportedly average \$12 per foot. The strength of the existing core retail area is partially diminished by office space.

The Avondale Estates residential market is generally characterized as an historic, single-family community with homes priced in the high \$200,000s with strong sales activity. The average home sale price in 2003 was \$291,353; the average median price was \$278,900. A sample of nearby small lot, detached single-family listings (i.e., cluster homes) reveals an average list price of \$356,786 and a median list price of \$345,000. A survey of selected higher density for-sale residential projects in and nearby Avondale Estates shows that absorptions vary but that the absorption of units priced from the mid \$100,000s to low \$200,000s is strong. A survey of competitive rental apartment communities indicates that nearby rental product is older with moderately strong occupancy rates. The market for mixed-used rental product has proven successful in nearby downtown Decatur.

Retail Demand Analysis

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

Downtown has the potential to capture 9% of the total increase of



Area employees represent a potential retail market



The creation of a unique dining environment could draw customers to Downtown Avondale Estates



Neighborhood-serving retail will be key to Downtown's success

potential sales in the greater market area during the 2003-2008 period, representing a total of 60,923 square feet of retail space. Potential expenditures by local retail market area residents will support an estimated 53% of this space. Between 2008 and 2013, the Study Area's capture of potential demand for retail space could potentially increase to 11% or 81,722 square feet, an estimated 50% of which is supported by local retail market area resident expenditures. For the ten-year period, the total potential capture for new retail space for the Study Area is 142,695 square feet. 35% of potential supportable space in the Study Area is allocated to Convenience Goods (50,253 square feet) and 28% to Shoppers Goods (40,112 square feet). Estimates of potential demand should be considered conservative as demand generated by persons living outside of the greater retail market area are not accounted for, including: a portion of the 42,000 employees who work within two miles of the Study Area, a portion of the 13,000 students at nearby colleges and universities who are not primary residents of the retail market area, commuters driving through or on the periphery of the Study Area and residents of new housing developed in the Study Area who will likely have disproportionately high expenditures at Study Area businesses.

The ability of the Study Area to achieve its retail sales potential in the face of competitors is dependant upon establishing itself as a mixed-use "place." In today's market, prospective retailers can choose from a variety of locations. All things being equal, the determining factor will be access to a captive base of residents. In this respect, Downtown's lack of housing is a liability. Not only do downtown residents generate retail sales, they also generate the qualities of place that retailers seek, namely pedestrian activity, safety, and making a place feel lived in. Without more residents, revitalization is not impossible, but it becomes much more challenging.

Primary target markets for retail development in the Study Area include market area residents, employees that work at nearby businesses, and students at nearby colleges and universities (i.e., Agnes Scott and Emory). Recognizing that market area residents will generate the largest share of sales at Study Area businesses, demographic and Lifestyle data and retail spending and purchasing activity data are used to identify the types of businesses that would be most appealing to this market. Shopping habits of daytime workers and college students as well as feedback from residents of Avondale Estates are also taken into account. Based on this information, recommended businesses include: women's and men's apparel, shoes, home furnishings and accessories, sporting goods, jewelry, unique garden supplies, architectural antiques, bookstore/magazine shop, music/CDs, gifts/cards, and toys. The types of convenience goods and services that would most appeal to residents (particularly those living within and immediately surrounding the Study Area) are: small grocery store or specialty market with a selection of take-



Fast food is not consistent with Downtown's retail potential



Quality townhomes could enrich Downtown and provide new residential options



Live-work units are one housing type for which demand exists

home/prepared meals, video rental, drycleaner/alterations, shoe repair, exercise studio/gym/yoga, drugstore, wine/liquor store, film processing, banking, and mail/copy center. Expanded entertainment options such as one-of-a-kind restaurants (e.g., ethnic cuisine, deli, breakfast spot, bar/grille/pub, dessert/coffee, ice cream/gelato), live music/theater (indoor or outdoor), community events, and other arts related activities would help the Study Area establish itself as an arts/entertainment district. If renovated, the former cinema could be used to host some of these activities.

Residential Demand Analysis

A statistical demand analysis was performed for the residential market area to estimate the potential market depth for for-sale housing and rental housing. The two main sources of annual potential demand for housing are new household growth and turnover. New household growth is traditionally used to project market growth and is based on population and household growth projections. Projected owner or renter occupied households are qualified or segmented by owner or renter turnover rates (derived from the 2000 Census), owner-renter preferences, income, household size and Lifestyle data.

Neither for-sale nor rental demand numbers are suggestions of the number of new units of housing that should be built in the Study Area. They merely provide insight into the level of market support and what could be achieved. **The final mix of residential uses within the Study Area is dependant on the will of Avondale Estates residents.**

In keeping with the residential character of the surrounding neighborhood and accommodating a limited supply of land available for new housing development, small lot, detached units (i.e., cluster homes), and townhouses, including those targeted towards empty nesters, are recommended for the Study Area. Opening price points of small lot, detached units should range from \$250,000 to \$350,000; more affordable townhouse units should be priced from \$180,000 to \$250,000 in the initial redevelopment phase. While there is clearly a demand for housing priced above \$350,000, it is our opinion that when unit prices rise above this level, demand will begin to thin out.

Early residents of newly developed housing in the Study Area are likely to be relatively mobile, well educated, active, and somewhat adventuresome with few or no children. Employees working in or close to the Study Area should be an initial target market for new housing, particularly young people, singles, and couples with few or no children and empty nesters. Longer term, groups outside of the market area such as married couples with and without children, empty nesters, retirees and professionals that work within commuting distance of their jobs should be targeted.

Section 2:
Visioning

2.1	Public Process	2:1
2.2	Character Preference Survey	2:3
2.3	Vision	2:7
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2.5	Concept Plan	2:12
2.6	Employment & Population Analysis	2:30
2.7	Trip Generation Analysis	2:32



TSW's Laura Kraul assists residents at the January Workshop

2.1 PUBLIC PROCESS

The public participation process consisted of an intense eight month period of Task Force Meetings, a Community Workshop, a project website, and one-on-one interviews with stakeholders running from October 2003 through June of 2004.

Task Force

At the beginning of the planning process a Task Force was identified to guide the process and serve as liaisons to the greater Avondale Estates community. In order to best represent constituencies in the Study Area, the Task Force was crafted to include residents, businesses, property owners, and elected official. A special effort was made to include both long-time residents and newcomers.

The final Task Force included:

- Commercial property owners
- City officials
- Small business owners
- Single-family homeowners
- Condominium and townhome owners

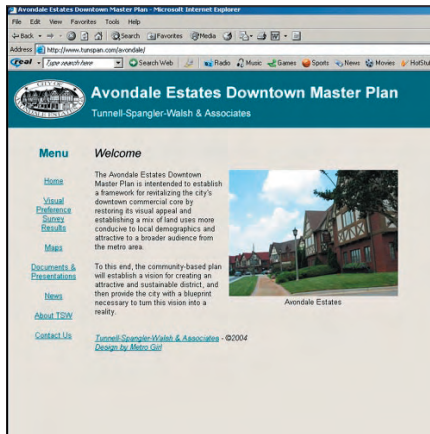
The Task Force met twice during the planning process on October 23 and April 14. These meetings were utilized to gain input into strengths, weakness, opportunities, and threats within the Study Area, promote community outreach efforts, and review and refine the vision developed during the workshop.

Interviews

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

- Residents
- City officials
- Small business owners
- Potential Investors
- Commercial property owners
- Developers
- Real Estate Agents

Community Workshop and Public Meetings



A project website was used to facilitate the public process

The primary tool for achieving public participation was a Community Workshop held on January 14, 2004. The Community Workshop was preceded by a printed advertisement delivered via post and e-mail.

The Workshop focused on developing a general vision and character for the Study Area. It started with a review of existing conditions, and then focussed on translating the vision established via the character preference survey into a plan (see Section 2.2 for details on the character preference survey). Nearly 200 attendees worked with the consultant team and Task Force members to create a plan that included the following components:

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

Following the Workshop, the consultant team synthesized results into the Draft Concept Plan. The Draft Concept Plan was presented to the Mayor and Board of Commissioners at an informational meeting on March 16, 2004. The draft was then presented to over 300 residents and business owners on April 28, 2004. At this meeting, questions were answered and concerns aired. The consultant team then revised the Draft Concept Plan to include revisions based on community feedback. Revisions were presented back to the community on June 29, 2004.

Project Website

A key public involvement tool was the project website. The website was used to post Workshop results, distribute documents, administer the Character Preference Survey and solicit community feedback. The website was accessed at www.tunspan.com/avondale.



*Commercial/Mixed Use
Score of -9.2*



*Commercial/Mixed Use
Score of +6.6*



*Commercial/Mixed-Use
Score of +5.4*

2.2. CHARACTER PREFERENCE SURVEY

A key visioning tool of the Avondale Estates Downtown Master Plan was the use of a Character Preference Survey (CPS). Using an on-line format accessed via the Master Plan website, the public was given the opportunity to score a variety of images for their level of appropriateness for the future of Downtown. Categories included Commercial/Mixed Use, Residential, Major Streets, Minor Streets, and Open Space/Gathering Space. Possible scores ranged from -10 (extremely inappropriate) to +10 (extremely appropriate). A score of 0 indicated no preference.

The CPS was available to take from November 16, 2003, to January 11, 2004. During this session 105 people took the survey. Following the Community Workshop, the CPS was reactivated based on community demand and ran from January 14 to January 23, during which time an additional 50 people took the survey, for 155 total respondents.

Following the survey, the most and least appropriate images were identified by taking the average (mean) score for each image. The following is a summary of the results. For more details on the CPS and its results, please see the Appendix.

Survey Results

Commercial/Mixed Use Character

Interviews conducted prior to the Workshop suggested a strong desire to revitalize Downtown with new commercial or mixed-use buildings. Upon being shown a series of different commercial types respondents selected two single-story strip shopping centers as the least appropriate building types. For most, the buildings were “too suburban” for Downtown. Additionally, many did not find appropriate the buildings’ prominent parking lot and lack of character.

The most appropriate commercial or mixed-use buildings were a row of two-story mixed-use buildings in Tennessee, followed by an image of the existing Tudor Village. Their traditional architecture, low-scale, and small-scaled retail made them highly appropriate for Downtown Avondale Estates. In addition, the high score for the Tudor Village represents a strong desire to retain these important buildings.



Residential
Score of -4.2

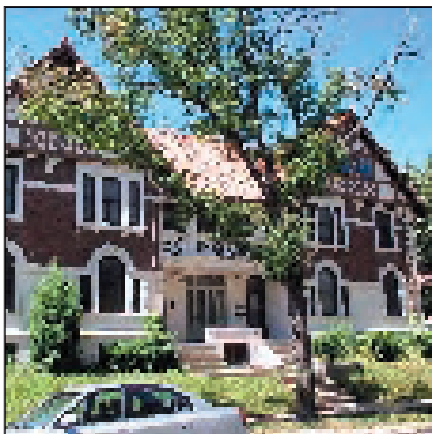
Residential

Downtown currently has few residential uses, although the character preference survey suggests a desire for increased residential options, provided that they are well-built buildings that complement, rather than detract from, the existing single-family character of Avondale Estates. To this end, the least appropriate residential image was a suburban traditional neighborhood development of single-family homes, followed by a mid-rise multifamily building. Neither of these images reflect the historic architecture or quality of residential buildings in the city.

The most appropriate residential images were both medium-density housing formats. The highest-scoring was a street of traditional detached homes on 5,000 square foot lots, while the next highest scoring was an image of a Tudor Revival quadplex (having the appearance of a single-family home) in Cincinnati, Ohio. This suggests a support for new housing in the Downtown area that is at a human scale and includes quality materials like brick, stone, and stucco. It also suggest that such should be executed in a traditional architectural vocabulary.



Residential
Score of +3.1



Residential
Score of +2.5



*Major Streets
Score of -6.7*

Major Streets

The future of major streets like North Avondale Road and North Clarendon Avenue is an important part of the visioning process. As arterials, the roads are subject to traffic forces beyond the control of Avondale Estates. However, their character should respond to context. To this end, participants gave low scores to wide, high-speed auto-oriented roadways with minimal sidewalks, while slower speed streets with ample sidewalks, on-street parking, street-oriented buildings and street trees scored the highest. This reinforces the results of the Commercial/Mixed-Use character scores.

Minor Streets

As new development occurs opportunities will arise to transform existing minor streets in the Study Area. Character preference survey results suggest that the current streets must change. The least appropriate new street image was one of Olive Street within the Study Area. This street is poorly defined, lacks a streetscape, and appears barren. Workshop participants did not like the street for these reasons, but also because they thought it indicative of marginal commercial uses.



*Major Streets
Score of +4.9*

In contrast, the most appropriate neighborhood street was a townhome street in the Kentlands community, near Washington, DC. Participants liked the street because it had street trees, sidewalks, and intimate scale. The street appears to be built for the sake of enriching the community, and not just moving cars. Other appropriate streets included Broad Street in Downtown Atlanta, and a shopping street in Gresham, Oregon. Like the Kentlands street, both are low-speed, human scaled streets that are lined with trees and pleasant to walk or bicycle on.



*Minor Streets
Score of -7.6*



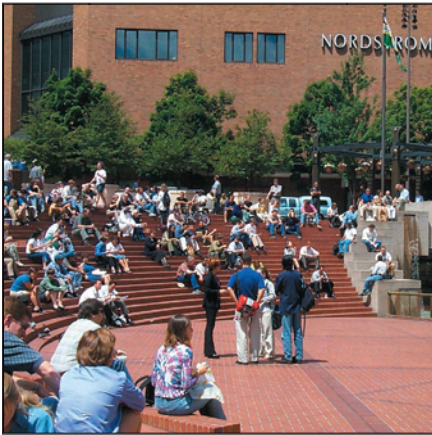
*Minor Streets
Score of +5.2*



*Minor Streets
Score of +5.1*



*Minor Streets
Score of +5.1*



*Open Space/Gathering Space
Score of -4.1*



*Open Space/Gathering Space
Score of +3.9*

Open Space/Gathering Space

The Study Area currently lacks significant parks and open spaces, but workshop participants would like that to change by increasing quality green spaces. The least appropriate images were a hardscaped plaza in Seattle and a focal point in downtown Smyrna, Georgia. Workshop participants expressed a desire that any open spaces built in the Study Area be green and large enough to identify as a unique space. They did not oppose fountains or plazas, but rather thought that open spaces should be vibrant and treed spaces. They wanted plazas and other hardscaped surfaces to be limited to strategic retail locations so that they would actually be used.

The most appropriate open space images were of Bryant Park in New York City and City Place in West Palm Beach Florida. Participants liked the trees, fountains, and sense of activity, but also that both provide a focal point for their respective communities, a quality supported by the large number of people in both images.

General Findings

The images selected as most appropriate represent places from around the nation. Regardless of origin, all share several things in common. Most notable is that all represent a small-town environment; workshop participants rejected images of center cities and suburban areas equally. Furthermore, all shared a common respect for the pedestrian, landscaping, and human-scaled buildings.

Results suggest that the residents, businesses, and property owners of Avondale Estates are yearning for a vibrant community center. Avondale Estates once had such a center, but years of neglect and business flight have compromised Downtown's role as such. As a result, there is currently no place that adequately represents the heart and soul of Avondale Estates, but the opportunity exists to recreate such a place in Downtown.



*Open Space/Gathering Space
Score of +3.*



*Open Space/Gathering Space
Score of -3.8*



The vision for Downtown includes a safe and inviting street and sidewalk environment

2.3 VISION

The vision for Downtown Avondale Estates is a unique pedestrian-oriented small town center catering to the shopping and services needs of residents and visitors. With its many trees, wide sidewalks, and safe, slow streets, Downtown's form should encourage walking and strengthen community bonds, while ensuring that automobile and bicycle traffic move in a safe and efficient manner. Pocket parks and plazas should be provided throughout, and important historic structures preserved and protected.

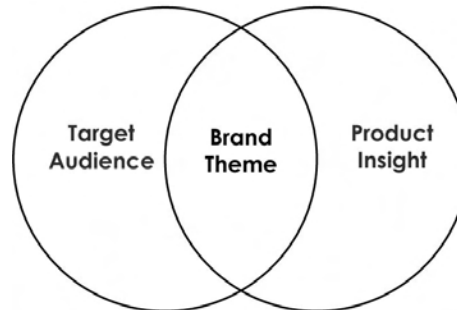
Downtown should include a variety of uses, with low-rise mixed-use buildings creating a pedestrian-oriented shopping area around the Tudor Village and along a new 'Main Street.' This area should transition to less intense live-work and studio uses as the distance from the center increases; residential buildings in this area should match the quality and craftsmanship for which Avondale Estates is renowned. The existing neighborhood to the east of North Clarendon Avenue should be preserved and protect, but should be connected to Tudor Village area through the addition of a multi-use trail. To the west, light industrial and commercial uses should be enhanced through the addition of streetscape improvements.

In its retail core, Downtown should provide a variety of uses to serve the needs of Avondale Estates, while attracting the outside customer base necessary to ensure their success. In addition to practical, neighborhood commercial uses such, as a market and drugstore, the area should include a unique "brand" or "theme" to attract visitors to the pedestrian-scale, sidewalk-oriented businesses along this 'Main Street' setting. These should include quality restaurants and unique shops that contribute to a low impact, family-oriented destination for residents and visitors alike.

All buildings in Downtown should embrace the street and enrich the public realm. The desire to create a timeless downtown requires that buildings front the street with grace and dignity. Landscaping should be provided, as well as entrances that open onto newly built wide sidewalks. Parking should be adequate, but delegated to the least obtrusive location to reinforce that Downtown Avondale Estates is built for pedestrians, not cars.

Core Brand Theme

The core brand theme is the area in which the needs and motivations of Avondale Estates' target audience overlap with the reality of Avondale Estates, depicted in the diagram below.



Those who will be drawn to the Study Area – customers and residents – will most likely be looking for an escape – from traffic, from strip development and big box stores, from maintaining a yard and garden – without having to travel far. They will want to be a part of something beyond themselves, whether it is an exciting shopping and entertainment district or a larger, established community. They'll be drawn to an area where they can walk from store to store or just sit for a moment and take it all in. Once the Study Area is redeveloped, the feeling of living, shopping or just enjoying it is expressed below:

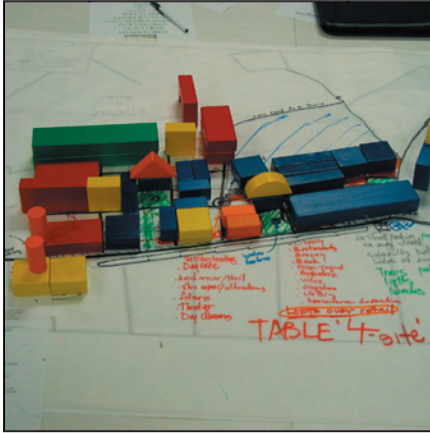
"With the blare of the city just behind you, you take a deep breath and clear your mind as you wind down streets that bring unexpected encounters at every turn. Overhanging gables, century old trees and lush gardens create a bucolic setting. For a moment you're reminded of the countryside; easy, secure and abundant.

Traditions are passed down from generation to generation, inviting newcomers to experience the community's history. Residents share lasting concern for each other and recognize the need to look beyond themselves. No matter what, there is a constant awareness of what matters most.

At the center of the community, daily life becomes part of a collective whole. No longer is life compartmentalized but infused with recreation, community and culture. New and familiar faces fill the streets, looking for entertainment, shopping or simply a place to relax. Although you realize that you'll have to return to the real world tomorrow, you pause, look around and focus on when you'll be back.

In essence, the Study Area's core brand theme can be summarized as...

A Neighboring Retreat, Enlivened by Culture, Community and Activity



Blocks were used in the Workshop to understand mass and scale

2.4 COMMUNITY GOALS

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

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

Community Patterns

Reinforce the historic role of the North Clarendon Avenue and North Avondale Road intersection as the center of Avondale Estates.

The Tudor Village area is the symbolic heart and soul of Avondale Estates. The master planning process should reinforce this role, while recognizing that the Tudor Village may have limited opportunities for realizing its commercial potential in the short-term. The surrounding properties, however, lend themselves to redevelopment that could have a positive impact on the Tudor Village and ensure its long-term revitalization.

Street Patterns

Provide an interconnected street system supporting a range of route options, transportation modes and reduced congestion on North Avondale Road.

Workshop participants expressed a strong desire to preserve the grid of streets in the western half of the Study Area and enhance it with new streets. Participants also expressed a strong desire that all streets be walkable and narrow, with wide sidewalks and no more than two lanes, plus parking.

Pedestrian Facilities

Ensure that walking is safe, convenient and enjoyable.

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



Tudor Revival architecture is not essential to revitalizing Downtown, but could support the existing character if designed correctly

Public Realm

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

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

Architecture

Create a sense-of-place through quality architecture that is appropriate for Avondale Estates.

Workshop participants believed that buildings should reflect high design standards. Commercial buildings should not be based on a corporate prototype, but rather, their context. Residential structures should be built to last. The architectural style of new buildings need not necessarily be Tudor Revival, but should be well-designed; poorly designed buildings have no place in Avondale Estates.

Buildings should orient towards the street through small setbacks, rear and side parking, and doors accessible from the street. Buildings should dignify the public realm and not exist as isolated objects. Along North Avondale Road two story buildings are appropriate, with higher buildings (up to four stories) near the rail line.

Historic Resources

Preserve and protect Downtown's landmark historic buildings.

Avondale Estates takes pride in its history as one of the nation's first planned "garden suburbs;" the downtown is no exception. Workshop participants believed that key historic buildings should be incorporated into the planning process as a legacy for the future.

Building Condition

Improve the quality of structures within the Study Area.

The Study Area includes Substandard, Deteriorated, and Dilapidated structures that are a liability to its revitalization. Workshop participants expressed a desire to ensure the revitalization of these properties via rehabilitation or redevelopment. Special attention should be paid to ensuring that the historic value of some such buildings are taken into consideration as part of the planning process.



Downtown must support a variety of transportation choices, including bicycling

Land Uses

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

Workshop participants expressed a desire for a range of land uses within Downtown. The greatest mix of uses should occur near The Tudor Village with a less intense mix occurring farther away. Residential uses should not overwhelm existing infrastructure or adversely impact the existing character of Avondale Estates.

Vehicular Systems

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

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

Transit Systems

Increase the use and convenience of MARTA buses.

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

Bicycle Systems

Increase the viability of bicycling within the Study Area.

There is a strong desire to improve bicycle facilities in the Study Area. Bicycling should be safe and convenient to increase recreational bicycling and make it a viable alternative for short-distance trips. Downtown should capitalize on its proximity to the PATH Stone Mountain Trail as both a target market for businesses and a way to reduce reliance on the automobile.

Retail Environment

Create a cohesive, pedestrian-oriented retail environment that functions as a unified whole, rather than a collection of parts.

Workshop participants expressed a dissatisfaction with the fragmented nature of the current retail environment. It was agreed that Downtown should function as a unified "place" defined by pleasant sidewalk shopping, quality storefront design, continuous storefront activity, and adequate parking play key roles in this.



The consultant team synthesized the comments of nearly 200 attendees into the Concept Plan

2.5 CONCEPT PLAN

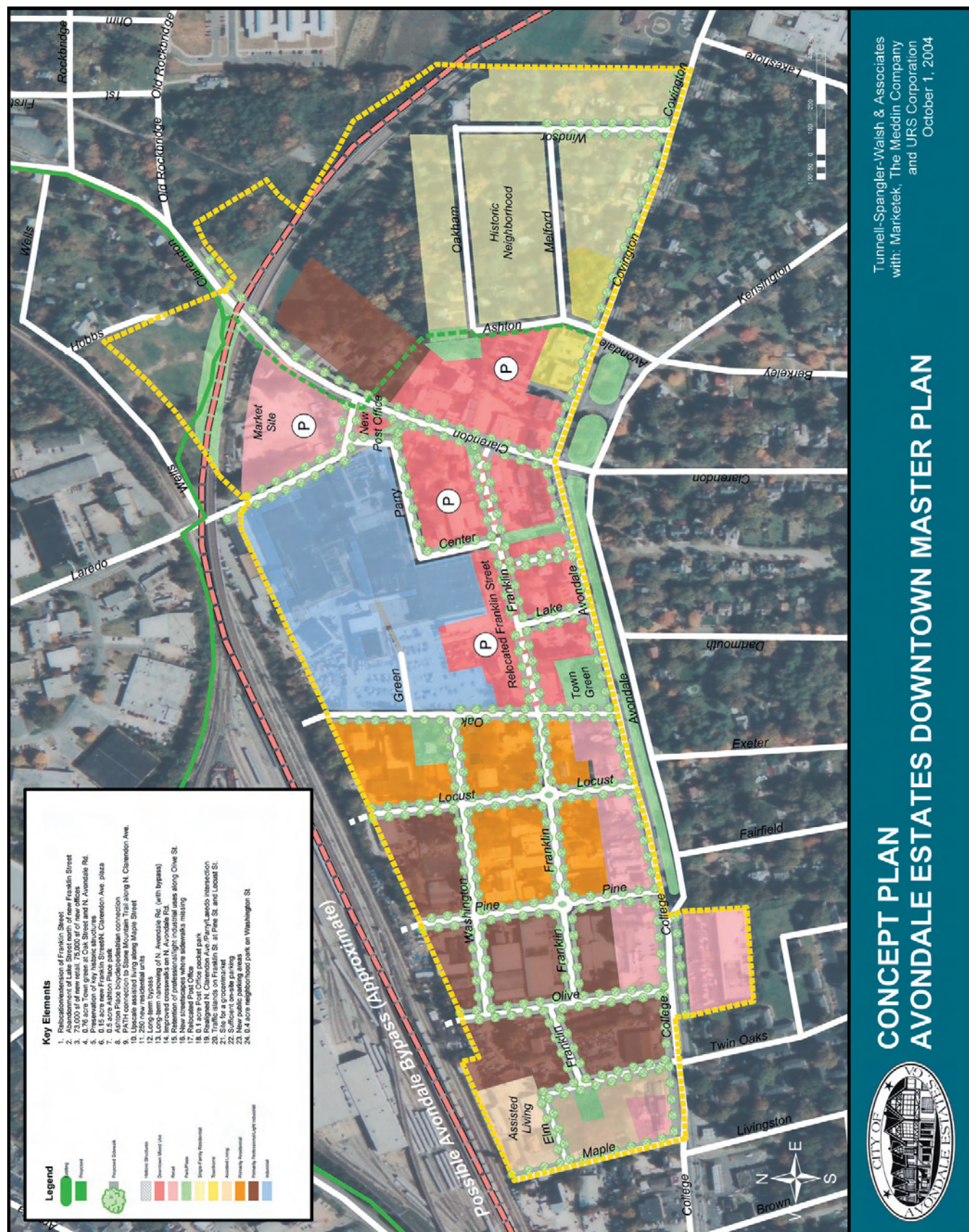
Downtown Avondale Estates represents a fragmented and under-utilized townscape containing remnants of a historic small town. The fragmentation is caused by an auto-oriented, pedestrian-hostile collection of uses and buildings organized with little regard for other uses or the surrounding community. The area was originally developed in a manner that respected the pedestrian and sense-of-place, but over the past 50 years it has fallen prey to suburban-style development that assumes that all access should be by car.

Today, the implications of this outdated community pattern are great. Pedestrians cannot safely and conveniently access nearby uses, traffic is forced onto North Avondale Road and North Clarendon Avenue, buildings are spread apart and fail to create a sense of place, and the public realm is neglected by recent buildings that turn their back on anything other than their parking lots.

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

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

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





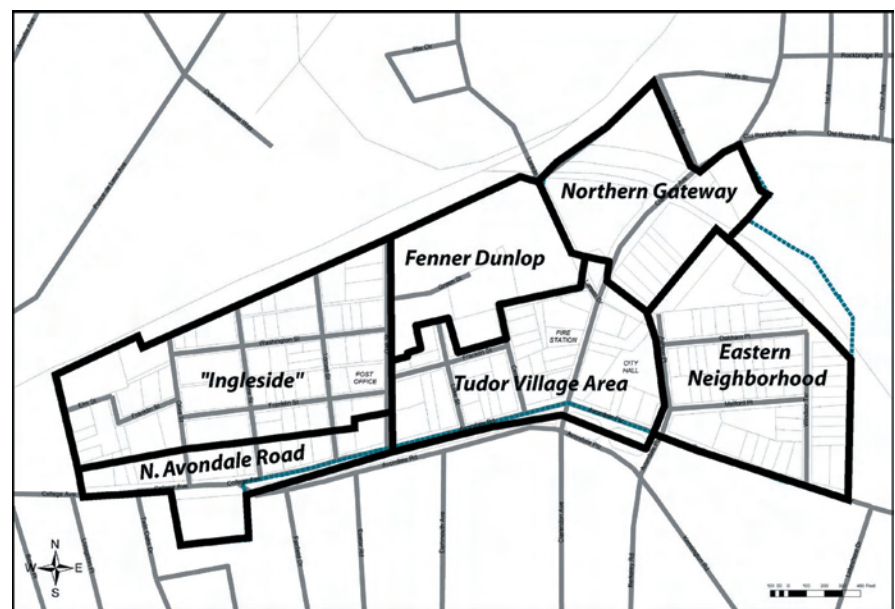
The Concept Plan supports the historic role of the Tudor Village as the heart of Avondale Estates

Community Patterns

The key to creating a vibrant downtown is recognizing that the area cannot, from a pedestrian, market and existing land use point-of-view, be a homogenous district. The Concept Plan recognizes six key subareas, including:

- **Tudor Village Area**, the commercial and civic core of Avondale Estates centered around the existing Tudor Village.
- **Northern Gateway**, the northern entry to Downtown, including a market, greenway and professional uses..
- **"Ingleside,"** a medium-density live-work area consisting of high-quality senior housing to the west, primarily professional and light industrial uses at its core, and owner-occupied residential units to the east.
- **North Avondale Road**, a commercial corridor providing space for retail uses whose scale, character, or parking demands are incompatible with the Tudor Village Area.
- **Eastside Neighborhood**, a preserved and protected single-family neighborhood
- **Fenner Dunlop**, a large industrial facility (Georgia Duck).

Subareas represent an organization structure for planning purposes only. They do not necessarily represent potential zoning designations or the like. Please see the map below for subarea locations.



Map showing proposed subareas of the Concept Plan



The possible Avondale Bypass would allow trucks and other through traffic to avoid Downtown

Street Patterns

The Concept Plan preserves and expands the interconnected street network of Downtown. This is achieved through:

New Franklin Street

The Concept Plan also proposes relocating Franklin Street (east of Oak Street) to the south, creating an 1,100 feet long street that can become a new 'Main Street.' This new street should provide for two-way traffic, except that the eastern-most block should be one-way eastbound to avoid vehicular conflicts that would otherwise be associated with cars attempting to turn onto it from North Clarendon Avenue. Travel lanes on the new street should be ten feet wide. Along its two-way portion, eight feet wide parallel parking spaces on both sides should be provided, while 18 feet wide angled spaces should be provided on both sides in the one-way portion. The old Franklin Street and Lake Street north of the new Franklin Street should be abandoned by the City and redeveloped.

Other New Streets

The Concept Plan includes several smaller new streets that could occur as part of larger scale redevelopment, including:

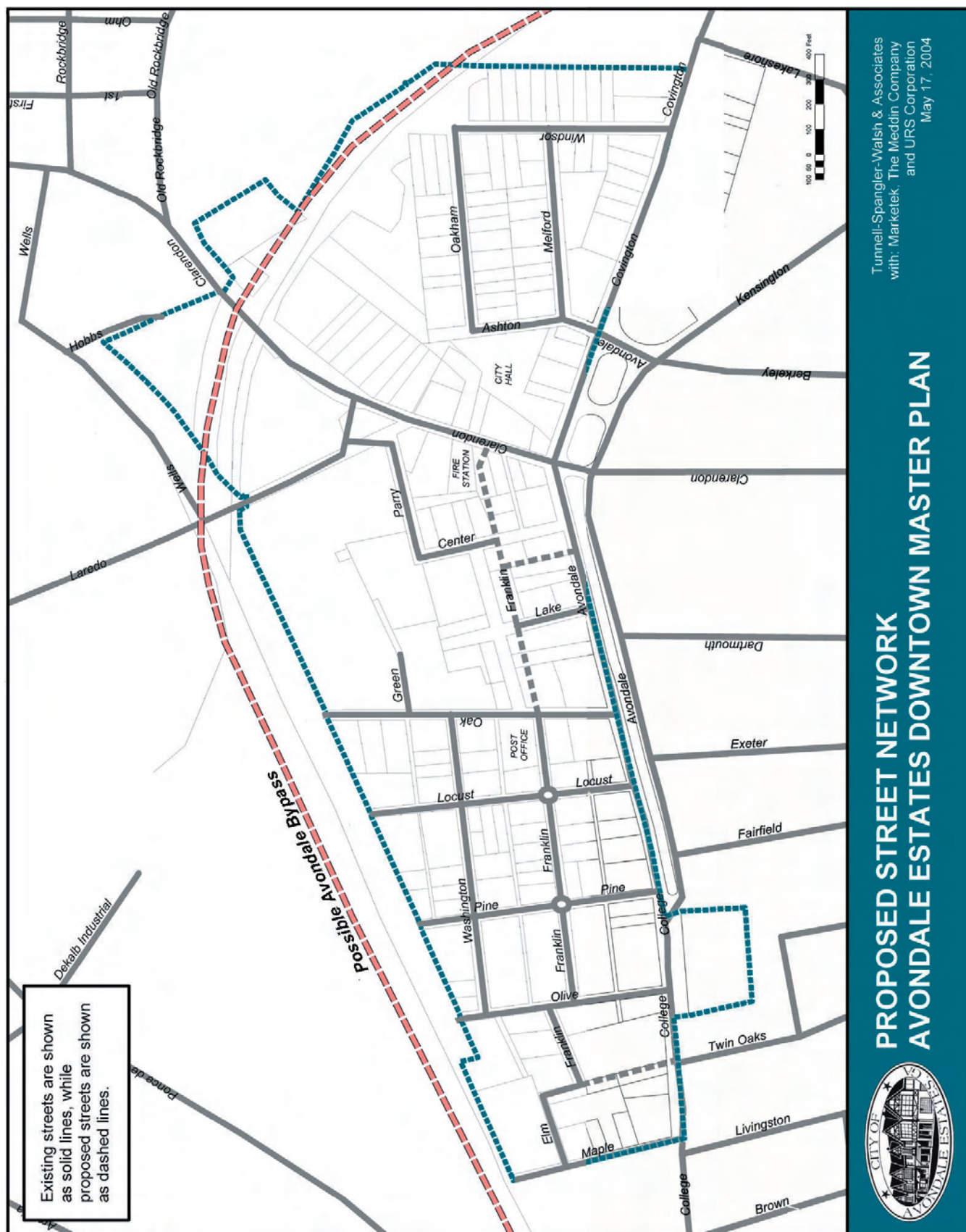
- A 250 linear feet relocated Center Street between Lake and current Center Streets.
- A 375 linear feet extension of Elm Street south to North Avondale Road that could occur with redevelopment of the vicinity.

Route Redesignation

If it is determined that the possible bypass' costs outweigh its benefits, the City could consider other options for rerouting the state route from Downtown. One way would be to move a portion of SR 10/US Route 278 to Columbia and Memorial Drives. The western portion could then extend via Columbia or Katie Kerr Drives to East College Avenue. This would allow Avondale Estates to control the character of North Avondale Road, but it would have impacts on Columbia or Katie Kerr Drives by shifting the burden of the state designation. Columbia and Katie Kerr Drives are residential streets that could require changes if placed on the state network. The impacts would need to be carefully determined by working with the City of Decatur, DeKalb County, and effected residents before action is taken.

The Possible Avondale Bypass

The bypass is a proposed road running from Stratford Road to East College Avenue. While the exact alignment would be determined based on land availability, east of North Clarendon Avenue it would





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

likely run north of the MARTA rail line to minimize its impact on homes.

The bypass is included in the Atlanta Regional Commission's 2025 Regional Transportation Plan. Unless the project is initiated by DeKalb County or the Georgia Department of Transportation, Avondale Estates would likely be required to pay 20% of the cost. Some of this may come in the form of donated City-owned land along the corridor, but the remainder would require an outlay that could be a financial burden on the small city.

The bypass' cost would need to be weighed against its benefits. It would provide an alternative to North Avondale Road for through-traffic, thereby reducing traffic on North Avondale Road and allowing it to become a city, rather than state, roadway. This redesignation would allow on-street parking, traffic calming, and other amenities that are prohibited on state routes. This is similar to the approach taken in Decatur, where Ponce de Leon Avenue was removed from the state system in the downtown area.

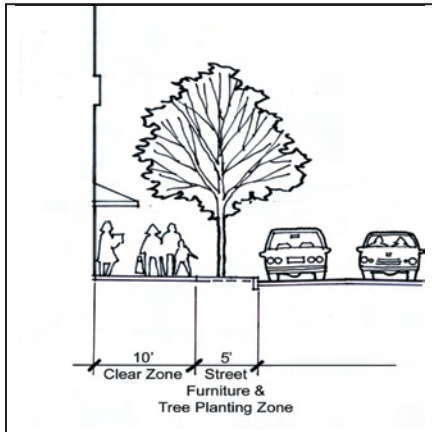
Pedestrian Systems

The Concept Plan improves pedestrian systems by expanding facilities and building new ones. In addition, its focus on creating pedestrian-oriented buildings promotes walking by making it safer and more pleasant. The Plan calls for sidewalks to be built within the City right-of-way in the short term. These sidewalks should be paid for by public funds, and should have a minimum total width of six feet, including a minimum one foot wide unplanted Street Furniture and Tree Planting Zone adjacent to the curb, and a five foot wide Sidewalk Clear Zone. Sidewalks on existing streets do not include burying utilities, which can run between \$190 and \$580 per foot.

Priority pedestrian **Projects** on existing streets include:

- 775 linear feet of new sidewalk along the north side of Franklin Street between Olive and Locust Streets.
- 890 linear feet of new sidewalk along the south side of Franklin Street where missing between Olive and Oak Streets.
- 2,330 linear feet of new sidewalk on both sides of Olive, Pine, Locust and Oak Streets, south of Franklin Street.
- 620 linear feet of new sidewalk on both sides of Lake Street, south of Franklin Street.
- 1,300 linear feet of multi-use, ten feet wide greenway trail running from the PATH trail to Ashton Place.
- 380 linear feet of new multi-use, ten feet wide greenway trail on the west side of Ashton Place.

Longer term pedestrian **Projects** on existing streets include:



Sidewalks along North Avondale Road and North Clarendon Avenue should have a minimum total width of 15 feet (current sidewalks are 6 feet wide)

- 590 linear feet of new sidewalk on the east side of Maple Street.
- 960 linear feet of new sidewalk along the north side of Washington Street.
- 1,110 linear feet of new sidewalk along the south side of Washington Street.
- 3,680 linear feet of new sidewalk on both sides of Olive, Pine, Locust and Oak Streets, north of Franklin Street.
- 660 linear feet of new sidewalk on the east side of Laredo Drive.
- 1,500 linear feet of new sidewalk on both sides of Franklin Street/Elm Street, west of Olive Street.
- 'Piano bar' or brick crosswalks at sidewalk intersections.

New streets should include buried utilities. Priority pedestrian **Projects** on new streets include:

- 1,100 linear feet of new sidewalk along the new Franklin Street.
- 500 linear feet of new sidewalk on both sides of the relocated Center Street.
- 750 linear feet of new sidewalk on both sides of the extension of Elm Street to North Avondale Road.

As development occurs (west of Ashton Place) public sidewalks should be augmented with buried utilities and wider sidewalks located on private property. This is similar to the approach taken in Atlanta, where private developers are required to expand sidewalks adjacent to their property when they build a new building. The width of privately funded sidewalks should be as defined below:

- Sidewalks on North Avondale, North Clarendon Roads (west of Ashton Place), and in the Tudor Village Area should have a minimum total width of 15 feet, including a five foot wide planted Street Furniture and Tree Planting Zone adjacent to the curb, and a 10 foot wide Sidewalk Clear Zone.
- Sidewalks in other areas should have a minimum total width of 12 feet, including a 7 foot wide planted Street Furniture and Tree Planting Zone and a five foot Sidewalk Clear Zone.

All planted Street Furniture and Tree Planting zones should include trees spaced an average of 50 feet on-center. Trees should be limited to canopy-forming street trees, such as oaks, maples, and elms.

Public Realm



The Concept Plan calls for converting Center Street into a tree-lined paseo with cafe dining and shops

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

Policies supporting an enriched public realm include:

- Requiring buildings that orient themselves to the street.
- Requiring buildings adjacent to parks or plazas to face them.

Projects supporting these policies include:

- Creating a 0.76 acre town green.
- Establishing a 0.5 acre park on Ashton Place.
- Developing a 0.15 acre plaza at the eastern end of the new Franklin Street.
- Creating a 0.4 acre park at Oak and Washington Streets.
- Creating intersection islands on Franklin Street west of Oak Street.
- Converting Center Street to a pedestrian-only way or *paseo*, south of the new Franklin Street
- Relocating the post office to North Clarendon Avenue to ensure its continued presence downtown. A 0.1 acre pocket park should be developed in front of it.

Architecture



A town green is envisioned for the northeastern corner of the Oak Street and North Avondale Road



Along Howell Mill Road in Atlanta, former non-descript industrial buildings have been converted into unique retail, restaurant, housing and office space

The Concept Plan calls for buildings within Downtown Avondale Estates to orient themselves towards the street in the manner of traditional cities and towns the world-over.

New buildings need not be in Tudor Revival style, but should use similar quality materials, including brick, stone, wood, or stucco. Low quality materials, such as EIFS (fake stucco), vinyl siding, or CMU (cinder block) should not be used in any new construction. In addition, such buildings should be limited to two full stories along within most of the Study Area. To the north, within the “Ingleside” area, buildings could achieve four stories along the rail line without compromising the intimate scale of Downtown.

Existing Modern and industrial buildings lend themselves to conversion into restaurants, retail, housing, or loft office space, similar to those along East Ponce de Leon Avenue in Decatur or Howell Mill Road in Atlanta. Such structures should celebrate both the buildings’ original and new uses.

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

Historic Resources

The Concept Plan calls for preserving key historic buildings, including:

- The Tudor Village
- The Hairston’s building
- The two story brick along the east side of North Clarendon Avenue, across from the fire station
- The two story commercial building at the northeastern intersection of Maple Street and North Avondale Road
- Several historic homes along Locust and Oak Streets (see Concept Plan map), including the Miller home.

In addition, the neighborhood to the east of Ashton Place should be preserved, as should the abelia hedge along the south side of North Avondale Road.

Building Condition

The Concept Plan proposes eliminating Dilapidated and Deteriorated buildings through redevelopment. Substandard buildings should be rehabilitated.

Land Use & Land Use Regulations



Buildings should orient themselves towards parks and plazas

The land use component of the Concept Plan calls for increasing the mix of uses in the Downtown, both vertically and horizontally, while preserving and protecting existing residential areas from commercial and industrial encroachment. At the same time, the Concept Plan calls for actually decreasing the amount of exclusively commercial or industrial land in order to concentrate retail activity into a compact setting, rather than a dispersed one.

Residential options within the Study Area are increased through the provision of areas for future townhome, single-family, condominium buildings, and above-shop lofts within close proximity to new businesses and parks. Residential uses are essential to the success of the Concept Plan, but should be carefully controlled by zoning and design guidelines to ensure that all new housing is of a quality equal to or exceeding that of the existing neighborhoods. Housing development proposals should be carefully evaluated for the impact on existing facilities, including schools, parks, roads, and other governmental agencies.

The Concept Plan represents:

- 250 total new housing units
- 75,000 sf of new office space
- 73,000 sf net of new retail/restaurant space
- 1.91 acres of new park space

These numbers reflect the transformation of the Study Area into a complex and economically vibrant center for retail, restaurants, residential and office uses.

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

- Protecting existing residential areas.
- Reducing exclusively commercial and industrial space.
- Encouraging the development of under-used retail and industrial space into new uses.

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

- Creating a new zoning code to support the Concept Plan.
- Focussing ground floor, “Main Street” style storefront retail within the Tudor Village Area, particularly along the new Franklin Street.
- Redeveloping the area along both sides of Locust Street into a primarily residential area.
- Redeveloping the east side of Maple Street into an assisted

living facility to allow existing residents of Avondale Estates to remain in the community as they age.

- Redeveloping the vacant land between North Clarendon Avenue and Laredo Drive into a market.
- Retaining existing professional and light industrial uses along the west side of Pine Street.
- Retaining Fenner Dunlop.

The Land Use Concept also goes into particular detail on the Tudor Village area, as defined below.

Tudor Village Area

The most important aspect of the Concept Plan is its focus on revitalizing the area surrounding the Tudor Village, the historic core of Avondale Estates. For a variety of reasons, including structural challenges, location on a congested roadway, lack of a critical retail mass, and lack of parking, the Tudor Village itself will be a significant revitalization challenge unless the surrounding area is first transformed into a viable business address. To this end, the vacant and under-utilized lands in the 13.7 developable acres surrounding the Tudor Village represent the foundation for building the mixed-use, pedestrian-scaled community center that the residents, business, and property owners of Avondale Estates envision.

The Concept Plan's key recommendation for achieving this occurs along the new Franklin Street, where a new three block long 'Main Street' is envisioned. This 'Main Street' could be built all at once



A revitalized business core is envisioned around the existing Tudor Village and includes a new 'Main Street' north of the existing Tudor Village

or phased. For example, if the portion between Center and Oak Street was built first, it could be fronted by rehabilitated existing buildings, such as the Academy Theater Performing Arts Center, or new buildings built on surplus right-of-way. Over the longer term, as property values rise and demand for space grows, the street should be extended and fronted with new buildings.

All new buildings should be two-to-three story buildings of the same scale as the existing Tudor Village. These buildings should be continuous along both sides of the street, except at open space, to ensure the ideal retail environment. The ground floor of these buildings should house shops, restaurants, and offices. The upper story should include a combination of office space and high-quality loft condominiums. Most public parking should be provided behind the buildings on the street's north side, while on-street spaces should be provided along the street.

The new Franklin Street should be anchored by open spaces at both ends. At the western edge a town square should be created at the intersection of Oak Street and North Avondale Road. This 0.76 acre green space should include benches, and possible gazebo for small community event; this structure could be modeled after the old trolley stop that once existed downtown. Most important, the square should preserve the mature oak currently on the site, and ensure that new trees are planted. It should also be designed so that adjacent buildings can front onto it, rather than turning their backs on it. A 0.15 acre plaza anchors the new street's eastern end. This plaza should be more hardscaped in nature than the town square, reflective of its role as a place for outdoor dining, small kiosks, possible fountain and similar functions.

The character of the new 'Main Street' should be carried to other key streets. North Clarendon Avenue should be gradually redeveloped with two story buildings that fill in underutilized lots or replace marginal structures. One such structure is the fire station, which should be relocated to a less prominent location. However, historic structures must be preserved and rehabilitated. Parking for these buildings should be provided mid-block behind City Hall. North Avondale Road should also have a similar character.



A textured median is envisioned along North Avondale Road to calm traffic and psychologically narrow the street

Vehicular Systems

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

Network and connectivity is a key component of the plan, particularly the possible Avondale Bypass. By expanding the existing network, routes are created that allow the traveler to use many alternative routes to reach their destination. As a result, the area can be served by multiple small (and livable) roads, rather than be hostage to one or two pedestrian-hostile arterials.

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

- Provide alternative local travel routes through network connections, new network segments and inter-parcel access.
- Employ cross-sections that balance personal vehicle travel with the need for pedestrian and bicycle-friendly facilities.
- Reduce automobile demand by providing goods and services within walking distance of residents.

North Avondale Road

North Avondale Road currently functions as a car-carrying conduit, with few pedestrian, bicycle, or transit amenities. Through this plan, there is an opportunity to tame this road so that it can serve vehicular demand while becoming more amenable to other travel modes.

As long as North Avondale Road is controlled by the Georgia Department of Transportation, options for taming it are limited to:

- Reducing curb cuts in new development by requiring shared driveways and access from a side street, where possible.
- Pedestrianizing intersections with highly-visible crosswalks.
- Converting the existing turn lane into a green median with textured turn lanes over the long-term. Such would require all left turns to occur at intersections, but this would be viable if curb cuts are relocated to side streets.
- Developing on-street parking by moving in the existing curb.



Angled parking should be provided on a portion of the new Franklin Street to support retailers

With the development of the Avondale Bypass as a state route, more aggressive options should be pursued, including:

- Reducing the street to a two lane roadway with on-street parallel parking on both sides and bike lanes.
- Investigating the signalization of more intersections.

Local Streets

Within the bulk of the Study Area, but not the Eastern Neighborhood, cross-sectional changes should occur on minor streets, including a standard 36 feet wide section made up of two ten foot travel lanes and two eight foot parking lanes. On such streets, highly visible crosswalks should be provided. On Franklin Street, traffic circles should be provided to calm traffic and improve aesthetics.

Parking

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

- **Common Parking.** Within the Tudor Village Area, common parking facilities should be built at part of redevelopment. These facilities should allow customers to park once and stroll around Downtown. Such facilities could be public or private, and could be surface lots or parking decks. All such facilities must be located so as to not negatively impact adjacent residential neighborhoods with light or noise pollution. In addition, all decks should be wrapped by buildings or provide ground-floor retail, restaurant or office uses.
- **Shared Parking and Parking Requirements.** The Concept Plan modifies zoning and development regulations to increase parking efficiency, and reduce the land area needed for parking facilities by allowing shared use parking and lowering required parking ratios.

Parking ratios should be consistent with those required in other Atlanta area downtowns. These include a minimum of: one space per bedroom for housing; one space per 250 square feet for retail; one space per 100 square feet for restaurants; and one space per 300 square feet for offices. Bases should be reduced where shared parking is a possibility, subject to a shared parking analysis conducted according to a model endorsed by the Institute of Transportation Engineers (ITE).

- **Bicycle Parking.** The Plan integrates safe bicycle parking, with conveniently located bicycle racks and lockers close to



Bus stops should be improved through shelters and posted schedules and route maps

the front door, into new development. For short-term storage, it calls for providing racks to accommodate at least two to five bicycle spaces for every 100 automobile parking spaces. For long-term storage and better protection from weather and vandalism, it calls for providing bicycle lockers.

- **Landscaping.** Surface parking lots are landscaped with street-front hedges, shade trees, and pedestrian walkways. A landscape strip with a minimum width of five feet should be provided between all surface parking facilities and the sidewalk. This strip should be planted with trees to shade cars and pedestrians. In areas where the parking facility abuts a neighborhood (such as along Ashton Place) the strip should be wider to protect existing homes.
- **On-Street Parking.** On-street parking is allowed and duration controlled. Enforced time restrictions support retail establishments with the provision of premium parking for shoppers and visitors and discourage employees from parking directly in front of stores.

Transit Facilities

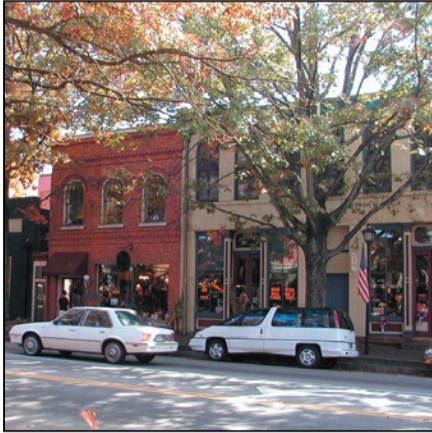
The Concept Plan includes oriented new buildings, roads, and sidewalks to facilitate transit access, and positioning jobs, shopping, services, and housing in a walkable mixed-use environment that inherently supports transit. The following recommendations focus on improving transit service in Downtown:

- Providing bus shelters and schedules.
- Creating land uses that support pedestrians and transit.

Bicycle Facilities

The primary mechanism for improving bicycle facilities is providing a network of slow-speed, bicycle-friendly streets. Because bicycles can operate in the flow of traffic on streets with speeds under 25 miles per hour, dedicated bicycle lanes are not necessary on most streets. They should, however, be pursued on North Avondale Road if it is ever removed from the state system.

The Concept Plan also promotes bicycle through the creation of the a greenway trail running from the existing PATH trail to Covington Highway, and by encouraging the City of Avondale estates to require bicycle parking as part of new development.



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

Retail Environment

Improving the retail environment is at the heart of the Concept Plan. Downtown currently functions as a collection of disconnected uses, rather than a cohesive center. The Concept Plan addresses the variety of retail challenges within the Study Area by:

- Concentrating 'Main Street' retail within the Tudor Village Area, which includes a continuous storefront environment at street level, adequate visibility and access from North Avondale Road, on-street parking, streetscaping, and slow speed, retail-friendly streets.
- Increasing new housing within the Study Area to 250 units, which would support retail by making the Downtown feel 'lived in,' generating demand for an additional 10,000 square feet of retail space, and placing 69 additional shoppers on the sidewalks between 12:00 and 4:00 PM on Saturday.
- Promoting a business mix that is well-balanced and supports the needs of residents and visitors.

Recommended Retail Uses

Based on demographic and lifestyle characteristics of local and greater retail market residents, retail spending and purchasing activity of retail market area households, community input, consideration of target markets, the supply and quality of existing retail establishments in the retail market and study area, physical constraints of the Study Area and retail trends, the types of specialty retail goods that would be best suited for the Study Area include:

- Women's Apparel
- Men's Apparel
- Shoes
- Sporting goods
- Jewelry
- Home furnishings and accessories
- Unique garden supplies
- Architectural antiques suited for nearby historic homes
- Bookstore/magazines
- Music/CDs
- Gift/cards
- Toy store with unique products attractive to children and adults



A small grocery store or neighborhood market is envisioned at North Clarendon Avenue and Laredo Drive

The types of convenience goods and services that would appeal to residents (particularly those living within and immediately surrounding the Study Area) include:

- Small, urban grocery store or specialty market with a selection of take-home meals
- Drugstore
- Wine/liquor store
- Video rental
- Exercise studio/gym/yoga
- Film processing
- Drycleaner/alterations
- Salon/day spa
- Shoe repair
- Banking
- Mail/copy center

Recruiting restaurants and entertainment related businesses to the Study Area should be a near-term priority in business recruitment. These types of businesses appeal to multiple target markets (e.g., community and market area residents, nearby workers and students) and, unlike specialty merchandise, do not rely as heavily on a critical mass of related businesses. Restaurants in nearby East Atlanta, Virginia Highland and downtown Decatur laid the foundation for what later evolved into vibrant business districts. One-of-a-kind restaurants that give target markets a reason to travel to the study area should be recruited, for example: deli/soup/sandwich shop, breakfast spot, bar/grille/pub, family restaurant/diner, barbeque, ethnic (e.g., Mediterranean, Thai/Chinese/Vietnamese, authentic Mexican/Tex-Mex,), desserts/coffee, English tearoom, and ice cream/gelato.

Activities that offer area residents and visitors something to do at night and on the weekend will help the Study Area establish itself as a destination. Activities that attract younger, active market area residents such as low key bars/pubs, concerts, theater, and art openings will also draw in older markets. Furthermore, a variety of entertainment options will be a major asset in marketing new housing. It is important, however, that entertainment businesses and activities not undermine Avondale Estates' small town charm.

The former cinema represents an opportunity for entertainment and community activities. Currently a "white elephant," the cinema could be renovated for multiple uses to increase its likelihood of success. For instance, nighttime activities could include live theater, concerts, dance and art films/film festivals, children's puppet shows,



Historic theaters across the country have been revitalized as downtown anchors

art classes, theater lessons, magic shows could provide weekend afternoon activities, artists could display their work throughout the lobby, and the community or nearby businesses could use the theater for meetings and seminars during the daytime or evenings. There are several approaches to financing and managing the cinema. For instance, a non-profit could be created to acquire, own, renovate and manage the theater, relying on private donations, grants and event revenue; a private developer could be solely responsible for acquisition, renovation, and operation; or a non-profit could acquire and renovate the cinema and afterwards convey it to the city to manage.

Small downtowns throughout the nation are increasingly learning that the arts can play a major role in their revitalization by not only building upon the community's cultural base and identity but also drawing a variety of related businesses. One of the greatest advantages in promoting arts related activities and businesses is that it can be done incrementally with a combination of public and private investment. For example, one major success story, such as the recent announcement of the opening the Academy Theater Performing Arts Center, could lead to nearby galleries, restaurants and/or live music. Experience has shown that businesses and activities such as art galleries, theater productions, street performances, and art studios have the potential of drawing related businesses such as restaurants, cafes/coffee shops, nightclubs, print/frame stores, specialty retail with evening hours, and "creative" businesses such as interior design and web development. Utilizing industrial space for artist studios is another opportunity to attract "pioneers" or new residents to the Study Area.

Please see Section III: Implementation for detailed Marketing Program Guidelines.

2.6 EMPLOYMENT & POPULATION ANALYSIS

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

2014 Employment and Population

Currently, 4,078 employees work within the area immediately surrounding the Study Area and an estimated 1,153 private sector jobs are actually within the Study Area. When the Concept Plan is factored into this, 301 new jobs will be added to the Study Area. The following table displays projected employment gains from development in the Study Area.

Downtown Employment

	Retail	Food & Beverage	Industrial/ Auto	Office	Total
Existing					
Square Footage	63,000	21,000	510,100	128,400	722,500
Employees	229	156	340	428	1,153
Concept Plan					
Net Square Footage	54,750	18,250	-103,200	10,650	-19,550
Net Employees	199	135	-69	36	301
Total Employment in 2014	428	291	271	464	1,454

It is estimated that 179 of Avondale Estates' 2,620 residents currently live within the Study Area. The Concept Plan will increase the number of Downtown residents to 647 over the next ten years (a net increase of 468), while the total city population could increase to 3,300.

Downtown Population

	Single-Family	Townhomes	Live-Work	Multifamily*	Total
Existing					
Existing Dwelling Units	61	0	0	34	95
Average Size	2.1	2.0	2.0	1.5	
Population	128	0	0	51	179
Concept Plan					
Net Dwelling Units	30	100	50	70	250
Average Household Size	2.1	2.0	2.0	1.5	
Population	63	200	100	105	468
Total Population by 2014	191	200	100	156	647

*Number includes assisted living units.

2029 Employment and Population

Forecasting employment and population growth beyond ten years is difficult on the micro-level. Real estate and economic trends are complex and subject to change. Although the Concept Plan is largely based on a ten-year build-out, longer-term forecasts can be made based on real estate cycles and the assumption that some facilities will be redeveloped.

Projected Change in Employment From 2004 - 2029

Year	Retail	Food & Beverage	Industrial/ Auto	Office	Total
2004	229	156	340	428	1,153
2009	329	224	305	446	1,304
2014	428	291	271	464	1,454
2019*	471	320	244	510	1,545
2024*	518	352	220	561	1,651
2029*	570	387	200	618	1,775

*Assumes a 10% per decade increase in office, retail, and food & beverage and a 10% per decade in industrial and auto uses.

Employment within the Study Area is expected to grow over the next 25 years. Over the next ten years employment growth should be primarily in the retail and food & beverage categories. However, the establishment of the Downtown as an office address over the long-term should result in significant increases in job growth; at the same time, long-term industrial and auto uses are expected to decrease as Downtown becomes more attractive for other uses.

Projected Change in Housing Units From 2004 - 2029

Year	Single Family Units	Townhome Units	Live-Work Units	Multifamily Units	Total Units
2004	61	0	0	34	95
2009	76	50	25	69	220
2014	91	100	50	104	345
2019	91	100	50	104	345
2024	91	100	50	104	345
2029	91	100	50	104	345

The number of housing units within the Study Area is expected to greatly increase over the next 25 years. Single-family growth will be strong within the next ten years, but will decrease as area is developed. Longer-term, growth should occur in the number of multifamily units, particularly as the area's vibrant street life begins to emerge and the area's desirability increases.

Projected Change in Population From 2004 - 2029

Year	Single Family Residents	Townhome Residents	Live-Work Residents	Multifamily Residents	Total Residents
2004	128	0	0	51	179
2009	160	100	50	104	414
2014	191	200	100	156	647
2019	191	200	100	156	647
2024	191	200	100	156	647
2029	191	200	100	156	647

As the number of housing units increase so will the population. The table above shows project population growth between 2004 and 2029.

2.7 TRIP GENERATION ANALYSIS

To ensure that the Concept Plan does not overburden facilities in the Study Area, an analysis of future conditions was undertaken. A formalized traffic impact statement was not performed under the scope of this plan due to the inherent flexibility of the proposed development program. However, general trip generation figures were calculated using ITE's Trip Generation guidelines for the proposed Concept Plan and compared to the existing trip generation given the current land uses that occur within the Study Area.

The table on the next page summarizes the results of those calculations for the existing condition, proposed 10-year development program, and longer-range 25-year program.

The relative traffic impacts call for an increase in daily trips in the range of 9,007 daily trips for the 10-year projection and of 11,786 for the 25-year horizon for the entire district. These figures represent increases of 50% and 66% respectively.

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

Existing

Land Use	Intensity		Daily Trip Ends	AM Peak Hour Trip Ends					PM Peak Hour Trip Ends				
	#	Unit		Total	In		Out		Total	In		Out	
					%	Trips	%	Trips		%	Trips	%	Trips
Commercial/Civic													
Retail	63	1000 SF	5,029	119	61%	72	39%	46	461	48%	222	52%	240
Food/Beverage	21	1000 SF	6,544	679	51%	346	49%	333	478	52%	249	48%	230
Industrial	510	1000 SF	3,708	513	88%	451	12%	62	566	12%	68	88%	498
Office	128	1000 SF	1,613	229	88%	201	12%	27	222	17%	38	83%	184
Park/Green space		Acres		Negligible						50%	-	50%	-
Residential													
Single-Family Homes	61	Dwelling Units	660	52	25%	13	75%	39	69	63%	43	37%	25
Townhomes/Condos	0	Dwelling Units	-	-	17%	-	83%	-	-	67%	-	33%	-
Live-Work Units	0	Dwelling Units	-	-	25%	-	75%	-	-	63%	-	37%	-
Multifamily Units	34	Dwelling Units	355	20	20%	4	80%	16	36	80%	29	20%	7
TOTALS			17,909	1,611	68%	1,088	32%	523	1,833	35%	648	65%	1,185

Year 10

Land Use	Intensity		Daily Trip Ends	AM Peak Hour Trip Ends					PM Peak Hour Trip Ends				
	#	Unit		Total	In		Out		Total	In		Out	
					%	Trips	%	Trips		%	Trips	%	Trips
Commercial/Civic													
Retail	117	1000 SF	7,521	172	61%	105	39%	67	694	48%	333	52%	361
Food/Beverage	39	1000 SF	12,154	1,260	51%	643	49%	618	888	52%	462	48%	426
Industrial	407	1000 SF	2,938	391	88%	344	12%	47	419	12%	50	88%	368
Office	139	1000 SF	1,719	244	88%	215	12%	29	234	17%	40	83%	195
Park/Green space		Acres		Negligible						50%	-	50%	-
Residential													
Single-Family Homes	91	Dwelling Units	953	73	25%	18	75%	55	98	63%	62	37%	36
Townhomes/Condos	100	Dwelling Units	642	52	17%	9	83%	43	60	67%	40	33%	20
Live-Work Units	50	Dwelling Units	214	18	25%	4	75%	13	20	63%	13	37%	8
Multifamily Units	104	Dwelling Units	775	55	20%	11	80%	44	75	80%	60	20%	15
TOTALS			26,916	2,265	60%	1,349	40%	916	2,490	43%	1,060	57%	1,429
Year 0-10 Change			50%	41%	-12%	24%	24%	75%	36%	20%	64%	-11%	21%

Year 25

Land Use	Intensity		Daily Trip Ends	AM Peak Hour Trip Ends					PM Peak Hour Trip Ends				
	#	Unit		Total	In		Out		Total	In		Out	
					%	Trips	%	Trips		%	Trips	%	Trips
Commercial/Civic													
Retail	135	1000 SF	8,254	187	61%	114	39%	73	763	48%	366	52%	397
Food/Beverage	45	1000 SF	14,024	1,454	51%	742	49%	713	1,025	52%	533	48%	492
Industrial	346	1000 SF	2,483	319	88%	281	12%	38	331	12%	40	88%	292
Office	160	1000 SF	1,916	273	88%	240	12%	33	258	17%	44	83%	214
Park/Green space		Acres		Negligible						50%	-	50%	-
Residential													
Single-Family Homes	91	Dwelling Units	953	73	25%	18	75%	55	98	63%	62	37%	36
Townhomes/Condos	100	Dwelling Units	642	52	17%	9	83%	43	60	67%	40	33%	20
Live-Work Units	50	Dwelling Units	214	18	25%	4	75%	13	20	63%	13	37%	8
Multifamily Units	104	Dwelling Units	775	55	20%	11	80%	44	75	80%	60	20%	15
TOTALS			29,260	2,431	58%	1,420	42%	1,011	2,632	44%	1,158	56%	1,473
Year 10-25 Change			9%	7%	-2%	5%	3%	10%	6%	3%	9%	-2%	3%
Year 0-25 Change			63%	51%	-14%	31%	28%	93%	44%	24%	79%	-13%	24%

Section 3:
Implementation

3.1	Design Guidelines	3:1
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3.3	Action Program	3:18



Design guidelines can be used to promote sense-of-place and quality architecture. This new historically-inspired firehouse near Birmingham, AL, is located in a neighborhood that values vernacular architecture.

3.1 DESIGN GUIDELINES

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

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

Buildings and Sites

- Face primary building entrances to the public sidewalk and street.
- Require uses to have entrances directly accessible from the adjacent sidewalk.
- Prohibit blank walls adjacent to the street or sidewalk.
- Require commercial uses to front the sidewalk with storefronts.
- Require all commercial and mixed-use buildings to have a minimum height of 24 feet.
- Limit building height to 45 feet (approximately three to four stories) along the north side of Washington Street.
- Limit building height to 35 feet (approximately three stories) in all other areas.
- Screen loading and dumpster areas from the street by locating them behind buildings.
- Require large developments to provide usable open space in the form of park, courtyards or plazas.
- Screen mechanical equipment on roof from public view.

Streets

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

Parking and Parking Lots

- Limit curb cuts to one per development street frontage.



Along shopping streets, such as the new Franklin Street and North Avondale Road, buildings should front the sidewalk with human-scaled storefronts.

- Permit shared parking.
- Provide walkways connecting parking lots and sidewalks.
- Provide a five foot wide landscape buffer (including trees) between all parking lots adjacent and the street.
- Place all parking behind or to the side of buildings. Parking between a building and the street is not acceptable. Where frontal parking is required, small liner buildings with a minimum depth of 20 feet should be provided at the back of the sidewalk to screen said parking and create a pedestrian-friendly sidewalk environment.

Sidewalks

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

On existing streets and without redevelopment:

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

On new streets or with redevelopment:

- Require sidewalks on new Franklin Street, North Avondale Road and North Clarendon Road (west of Ashton Place) to have a minimum total width of 15 feet, including a five foot wide Street Furniture and Tree Planting Zone adjacent to the curb, and a ten foot wide Clear Zone.
- Require sidewalks in other areas to have a minimum total width of 12 feet, including a five foot wide Street Furniture and Tree Planting Zone adjacent to the curb, and a seven foot wide Clear Zone.

Supplemental Zones

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

- Build all buildings at the back of the Supplemental Zone.
- Provide a consistent Supplemental Zone depth along a block face, but landscape said zone adjacent to residential uses and hardscape it next to commercial uses.
- Limit the height of fences within a Supplemental Zone adjacent to residential uses to forty-two inches.

- Encourage the landscaping of fences.
- Prohibit fences within a Supplemental Zone adjacent to non-residential uses.

Signs

- Prohibit freestanding signs between a building and the street.
- Require signs between a building and the street to be applied to buildings.
- Prohibit glossy extruded plastic, internally lit signs.
- Limit sign material to wood, metal, stone, or externally lit and matte finished plastic signs.

Park and Open Space Surroundings

- Ensure that adjacent streets are along a minimum of 50 percent of the park's perimeter and optimally along 100 percent of its perimeter. The safest parks are those that are completely visible to neighbors and police driving on surrounding streets.
- Face surrounding buildings onto park or opens spaces; avoid back yards abutting the park. Without exception, parks with abutting backyards that are screened from visibility by backyard fences are less safe than others.
- Ensure that no streets dead end into parks creating security problems.



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

Park and Open Space Design

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

Designing for Security

One of the biggest threats to the creation of a walkable, vibrant neighborhood is the potential proliferation of gated communities. Avondale Estates is not a gated community, and gated communities have no role in the city's future. While the desire for security is understandable, the gating off of an entire community from its surroundings is not acceptable. Conventional gating not only prevents the connectivity that is essential to the Concept Plan, it also serves to segregate residents and promote social isolation. Gated communities also do a great disservice to existing residents of the community who, in many cases, have lived there for decades by suggesting that the community they know and value is something which the newcomer must be isolated from. Additionally, the security benefits of gating a development are oftentimes more psychological than reality-based. Studies across the nation have shown that gated



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



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



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



Landscaping along this fence softens the sidewalk environment.

communities can make their residents more naïve and, as a result, more prone to crime within their walls. In fact, it is sometimes argued that gated communities actually promote crime by removing eyes from the street, creating a false perception of security, and promoting social isolation.

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

Principle 1: Use buildings to secure space

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

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

Principle 2: Provide security on doors

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

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



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

Principle 3: Provide open streets

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

3.2 MARKETING PROGRAM GUIDELINES

The marketing process begins with a clear statement of Avondale Estates' identity and competitive position in the marketplace: being the most accessible, the most idyllic or even the most affordable community will not guarantee the Study Area's success. Avondale Estates, and more specifically the Study Area, must perceive itself as a product and market itself to compete with other nearby business districts and cities by not only meeting the needs of its target audience but by also giving them a unique and authentic experience. Business districts and communities that win in the long run are those that create brand personalities that connect with people, that share values and that build long term relationships.

Developing and promoting a brand theme will be a key part in marketing the Study Area, acting as the central organizing principle – the DNA – around which the Study Area communicates its message or story to its target audience. The Study Area's brand theme should be succinct, emotional, distinctive, truthful and meaningful. It is not a tagline but rather the central idea upon which all other initiatives are based – e.g., logo, urban design, signage, advertising, marketing collateral, website, etc.

Product Insight

Identifying what "Avondale Estates" means to internal and external markets and balancing these perceptions with reality lays the foundation for the brand theme. While understanding the emotional core of a product – the product here being Avondale Estates – is essential in building an effective brand theme, truthfulness is key. For instance, promoting an industrial area as a pristine environment is counterproductive.

In depth interviews with residents, public officials and business/property owners were conducted to uncover current perceptions of Avondale Estates. Central or reoccurring themes revealed through this process are summarized below:

Motivations for Moving to/Opening a Business in Avondale Estates

Resident Insight

- Strong sense of community: pool, community groups/activities, families, tree-lined streets, tranquil, generations of families
- Grew up in Avondale Estates and returned when they could afford a home there

- Reputation as a great place to raise a family
- Well-built, historic homes
- Good Investment
- Relatives in the neighborhood
- Directed to Avondale Estates by a realtor/friend/spouse and immediately fell in love with it

Business Insight

- Perceived as a area “ripe for development”
- Close to home, customers, suppliers
- Affordability: more space for less money

The Greatest Advantages of Living/Doing Business in Avondale Estates

Resident Insight

- Strong community life: annual events, supper clubs, organized activities for children, parents and seniors, etc.
- Multi-generational – “at the pool you’ll see infants, moms and retirees”
- Peacefulness
- Ability to walk to downtown for eating out/shopping
- Great place to raise a family
- Proximity to downtown Atlanta yet bucolic
- Autonomous city
- Stability – people and businesses have been there are long time and will likely continue to stay there
- Recreation (e.g., pool, walking, lake)

Business Insight

- Customers enjoy coming to the community – almost a special outing
- Loyal customers
- Accessible to customers and clients
- Safe
- Able to “be part of the community’s growth”

The Greatest Disadvantages of Living/Doing Business in Avondale Estates

Residents Insight

- Crime and aesthetics in surrounding areas (e.g., Memorial

Drive) – “There is no pretty way to enter the city”

- Inadequate schools
- Longtime resident’s and newcomer’s conflicting vision for Avondale Estates’ future
- Limited retail base

Business Insight

- Lack of destination businesses
- Perception of restrictive government (e.g., business hours, signage)
- Limited pedestrian traffic
- “Underdeveloped”
- Lack of Parking
- Appearance of commercial development west of downtown

Factors that Separate Avondale Estates from Other Nearby Neighborhood Business Districts

Resident Insight

- Authentic community – “you actually know someone on every block”
- Urban location but removed from city life
- Safety (excellent police protection)
- Commercial area is emotionally linked to but physically separate from residents
- A separate municipality
- Scale and quaintness
- Tudor architecture
- Diversity in terms of age, income and politics

Business Insight

- Never rundown and abandoned
- Lack of destination businesses/pedestrian traffic
- Separate commercial and residential areas “two cities in one”

Perception of Avondale Estates from those Outside of the Community

- An affluent enclave
- Historic, Tudor theme
- Residential
- Unfamiliarity

- Quaint
- Close-knit community

What Constitutes an Avondale Estates Lifestyle

- “Mayberry with an Edge”
- Small Town USA: traditional, clean, safe, strong community life and family oriented
- Laid back
- “Old time living where you don’t worry about your kids playing in the street”

Images that Come to Mind When You Hear “Avondale Estates”

- Quaint community
- An English estate
- Exclusive, affluent
- Family life
- Underutilized commercial uses
- An enclave
- Historic, bucolic community
- Small town living
- “An oasis smack in the center of DeKalb County”

Qualities that Should be Incorporated in the Redevelopment of the Study Area

Resident Insight

- Dense but compact scale
- References to, but not a reliance on, the Tudor theme
- Sense of community/“ownership”
- Multi-generational
- Pedestrian linkages
- Culture/arts
- Unified design
- “A place that can stand the test of time”

Business Insight

- Density
- Residential development
- “Garden district”

The above information provides insight to how Avondale Estates

differs from its competitors. Nearby neighborhood business districts - particularly downtown Decatur due to its proximity – will be the most direct competitors of new business and residential development in the Study Area. In addition to downtown Decatur, Virginia Highland, Little Five Points, East Atlanta, Emory Village and the neighborhoods that surround them are, at varying levels, competitors of the Study Area. The success of each of these neighborhood business districts, however, is largely tied to their distinct identities. For instance, downtown Decatur has established itself as a dense, urban, mixed-use district, catering largely to young professionals; Little-Five Points is known as a bohemian, specialty retail and entertainment district; and Virginia Highland is generally viewed as an upscale shopping and entertainment corridor surrounded by homes inhabited by young, upwardly mobile professionals. It is important that the Study Area not seek to replicate its competitors but rather differentiate itself. Major qualities that differentiate “Avondale Estates” from its competitors include:

- Urban proximity but rural sensibility
- Civic autonomy
- Tudor Architecture
- Multi-generational
- Recreational options (e.g., community pool, lake, senior groups)

Target Audience

Shifting values are embodied in the type of environment envisioned for the Study Area. Avondale Estates epitomizes the notion of community. It offers authentic small town living and shopping. As a separate municipality, residents have a voice in the quality of service and they feel protected by a capable police force and concerned neighbors. Not only are homes in Avondale Estates beautiful and well built, but residents can walk to community events, recreational activities and shopping – enabling them to feel connected as well as lead an active lifestyle.

Key Steps

Developing and implementing a consistent and well-coordinated marketing program will be key in promoting the Study Area’s core brand theme. The underlying purpose is to convince prospective residents, employers, shoppers and investors that positive change is occurring with tangible results. At this point in the redevelopment process, marketing efforts should be primarily geared toward developers and new businesses within the Atlanta metro area as opposed to the general public.

To successfully promote and capitalize on the market opportunities identified in the Retail and Residential Market Analyses, an aggressive marketing campaign should be carried out that includes the following elements.

1. Real Estate Preparation

One of the key elements of transforming the Study Area into a vibrant, mixed-use district will be providing incentives that will attract developers. One of the best strategies for recruiting developers is to be able to provide an inventory of available real estate, and better yet, be in the position to bring key properties to the table. Steps in real estate preparation include:

1. Conduct a review of existing sites, buildings and underutilized/ vacant lots for redevelopment and determine infrastructure availability.
2. Document property inventory that includes property specifications and condition, ownership, the terms of the sale/lease.
3. Based on the property inventory, rank the sites/buildings according to their potential for development or locational importance, categorizing them as short-term or long-term potential initiatives.
4. Select sites/buildings with the greatest potential for immediate or short-term occupancy; secondly, select those with long-term occupancy potential.
5. Identify best uses for sites/buildings.
6. Consider land swaps, land purchases or land assembly.
7. Prepare collateral specification sheets on targeted or available sites/buildings (stored digitally so that they can be readily updated) that include the following:
 - Total and useable square footage
 - Lease/sales terms
 - Amount of store frontage and parking
 - Photographs, aerials, building footprints and/or floor plans

2. Development/Business Relocation Incentives

Potential incentives to attract developers or new businesses to the Study Area include:

- Local government support of public policy initiatives and economic incentives.
- Appropriate building and zoning codes and expedited plan

review.

- Public land leased or sold at below-market rates.
- Low interest loans/revolving loan fund.
- Tax increment financing to subsidize a project's land cost or for public spaces.

3. Identification of Target Businesses

The centerpiece of a successful redevelopment program is attracting businesses with the greatest chance for survival, particularly in the initial phase of the program. "Success stories" will be the easiest way to attract developers and investors. Therefore, recruiting the right types and mix of businesses is crucial.

- Target business based on the findings of this study.
- Differentiate between short-term and long-term businesses.
- Businesses that appeal to more than one target market are most likely to succeed.
- Target businesses that are unique or focus on customer services to better compete with nearby shopping centers, malls and neighborhood business districts. A variety of smaller businesses that complement each other will be easier to attract than large national chains and will offer customers something different than what they can find elsewhere.

4. Collateral Materials

Marketing collateral should not only illustrate the vision for the Study Area but also demonstrate market support for targeted businesses. Collateral materials will require developing multiple packages with variations on the information presented (e.g., prospect packages, media packages, new business packages, etc). Types of collateral material include:

- Prospect package – focus on succinct, attention getting information. Demographic highlights, potential market support for retail and residential uses, property specification sheets, photographs or renderings of recent and planned projects, infrastructure upgrades, success stories, etc.
- Market opportunity fact sheets – business-specific fact sheets that outline why specific businesses or market segments (retail or residential) should be located in the Study Area.
- Quality, fold out maps that illustrate the vision of the Study Area with existing anchors and proposed projects highlighted.

- Consider developing CD-ROMs that duplicate the hard copy material.

5. Web Presence

“avondaleestates.org” is in the final stages of being updated. Unlike other marketing material, the website will provide an interactive experience to visitors. Given the fact that several of the target markets for Study Area housing and retail development are young and spend a significant portion of their free time on the Internet, avondaleestates.org represents a considerable marketing opportunity. Prospective residents and customers will be able to access information on new development and upcoming events as well as gain some idea of the “Avondale Estates’ experience.” It is essential that the website complement and build upon the brand theme. Specific objectives include:

- Communicate the experience of living, working, shopping or visiting the Study Area.
- Inform local and area residents, employees, existing businesses, developers and prospective businesses/ residents of key information (e.g., property specification sheets, new and proposed projects, community events, business listings, news releases, etc.).
- Build community by facilitating a dialogue between citizens, leaders, developers and stakeholders (e.g., discussion forums, email updates, opinion surveys, etc.).
- Outline the development process (e.g., design guidelines, permitting process with links to forms, timeframe, etc.).
- Minimize operations and marketing costs by delivering information & services online.

6. Public Relations

Efforts to promote the results of the market analysis should include:

- Press kit/package.
- One-on-one and small group presentations to:
 - Stakeholders – business community, property owners, etc.
 - Referral sources – realtors, business leaders, etc.
 - Developers
 - Business prospects
 - Financial backers
- Large group/public presentations to key partners.
- A speaker’s bureau should be organized together with

an ongoing presentation schedule to publicize the effort, progress and results of redeveloping the Study Area. These presentations may also be helpful in generating business leads and volunteers to help with the effort.

7. Business Recruitment Campaign

Business Recruitment should focus on attracting specific employers, developers, retail and/or service businesses to the Study Area. A business development team should be organized to help carry out the following:

- Direct mail campaign to businesses and developers from within and beyond the Atlanta metro area.
- Advertising campaign.
- Referral networks: brokers, other economic development agencies, leasing offices, etc.
- A call program to leads generated from ad/direct mail campaigns.
- Sales program to identify and court prospects.
- Database development to track prospects.

8. Implementation Program

Annual priorities will need to be established and a budget set to ensure that a marketing program is implemented. It should be organized with consideration for resources, schedule or timing and responsible parties (including staff and volunteers/committees).

3.3 ACTION PROGRAM

The Action Program outlines the next steps in the process after adoption of this plan by the City of Avondale Estates. It includes a list of Policies, Programs, Projects, time lines and responsible parties. Most important, this plan is attempting to address conflict among different land uses, growth and traffic while providing livable communities, places where people can live/work and enjoy, balancing economic growth while preserving historic and natural resources and overall improving the quality of life of the residents of the area. Stakeholders identified several efforts to assure implementation. These included continued diligence on the part of area residents, business, and the City to monitor development in the Study Area and ensure compliance with the Concept Plan. Part of this should be revisions to the Concept Plan and Action Plan, as needed.

This plan may be approved by the Atlanta Regional Commission (ARC) as a grandfathered Livable Centers Initiative (LCI) Study. If it is, the ARC has committed to provide funding for implementation of plan elements related to transportation. Their expressed desire is for public infrastructure investments to spur private investment within existing activity centers. The strategies for funding scheduled improvements outlined herein supplement the potential funding from the ARC's LCI Program.

Transportation projects may also be funded through a variety of other sources administered through the ARC. The City of Avondale Estates should work with ARC staff to ensure that projects that require transportation funds are included in future Regional Transportation Plans (RTPs). Revisions to such are made every five years; the 2030 RTP is currently being finalized.

Any funds administered via the ARC will require a twenty percent local match. The planned Tax Allocation District (TAD) will be a key source of these funds, other sources could include:

- **Community Improvement Districts (CIDs):** A CID is a self-imposed, self-taxing district run by a non-profit organization. A CID is charged with raising funds from commercial properties for public improvements. The City of Avondale Estates should investigate creating a CID for the Downtown area.
- **Local Bonds:** The City could also hold a local citywide bond referendum to fund quality-of-life improvements in the City. Said bond would be retired through an increased millage rate.

- **Private Donations:** A local matches could also be obtained through soliciting area property owners, businesses, and residents. Although highly unusual, this method was used in Atlanta to fund public improvements in the Fairlie-Poplar district.

Private funds may also be used to fund specific “special interest” projects. For example, the PATH Foundation funds multi-use greenway trails, while the Trust for Public Lands and the Blank Foundation sometimes fund urban park projects.

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

Cost Assumptions

As with any macro-level planning process, it is impossible to perfectly assign costs to future projects. However, it is possible to estimate based on standard cost assumptions. The following assumptions are used in the Action Program Matrices found on the following pages; all costs include installation:

- Street trees = \$600 each
- Pedestrian lights = \$3,500 each
- Concrete sidewalks = \$5/sf
- Five foot concrete sidewalks plus one foot grass strip on existing streets, including site work = \$6/sf
- Brick pavers = \$15/sf
- New roadways = \$175/linear foot

All land costs were based on 2004 Total Value (land plus buildings) as reported by the DeKalb County Board of Tax Assessors. Effective transportation project land costs were increased by 15% through the engineering cost. All other land costs already include a 15% premium.

All costs are in 2004 dollars.

Transportation Projects

Description	Type of Improvement	Engineering Year	Engineering Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source	City Amount
New Franklin Street - Land Acquisition - 116 Center St (PID 15 249 15 011)	pedestrian, roadway operations	n/a	\$12,540	n/a	\$83,600	\$96,140	City	TAD	City	\$96,140
New Franklin Street - Land Acquisition - 6 Lake St (PID 15 249 15 004)	pedestrian, roadway operations	n/a	\$15,600	n/a	\$104,000	\$119,600	City	TAD	City	\$119,600
New Franklin Street - Land Acquisition - 4 Oak St (PID 15 249 16 004)	pedestrian, roadway operations	n/a	\$21,990	n/a	\$146,600	\$168,590	City	TAD	City	\$168,590
New Franklin Street - Land Acquisition - 68 N. Avondale Rd (PID 15 249 16 002) - Rear portion only	pedestrian, roadway operations	n/a	\$32,775	n/a	\$218,500	\$251,275	City	TAD	City	\$251,275
New Franklin Street - Land Acquisition - 70 N. Avondale Rd (PID 15 249 16 001) - Rear portion only	pedestrian, roadway operations	n/a	\$17,528	n/a	\$116,850	\$134,378	City	TAD	City	\$134,378
New Franklin Street - Land Acquisition - 10 N. Clarendon Ave (PID 15 249 11 014)	pedestrian, roadway operations	n/a	\$34,845	n/a	\$232,300	\$267,145	City	TAD	City	\$267,145
New Franklin Street - Land Acquisition - 121 Center St (PID 15 249 11 007)	pedestrian, roadway operations	n/a	\$16,620	n/a	\$110,800	\$127,420	City	TAD	City	\$127,420
New Franklin Street - Land Acquisition - 2983 Parry St (PID 15 249 11 003) - Rear portion only	pedestrian, roadway operations	n/a	\$9,000	n/a	\$60,000	\$69,000	City	TAD	City	\$69,000
New Franklin Street - Land Acquisition - 131 Center St (PID 15 249 11 005)	pedestrian, roadway operations	n/a	\$17,985	n/a	\$119,900	\$137,885	City	TAD	City	\$137,885
New Franklin Street - Land Disposition - Lake St Abandonment north of new Franklin St	pedestrian, roadway operations	n/a	n/a	2009	-\$20,000	-\$20,000	City	Private Redeveloper	n/a	-\$20,000
New Franklin Street - Land Disposition - Old Franklin St Abandonment	pedestrian, roadway operations	n/a	n/a	2009	-\$65,000	-\$65,000	City	Private Redeveloper	n/a	-\$65,000
New Franklin Street - Roadway Improvements - 1,100 Linear Feet	roadway operations	2008	\$28,875	2009	\$192,500	\$221,375	City	TAD	City	\$221,375
New Franklin Street - 10' Sidewalk Clear Zone - 2,200 Linear Feet	pedestrian	2008	\$16,500	2009	\$110,000	\$126,500	City	TAD, LCI, SAFTEA	City	\$38,500
New Franklin Street - 5' Brick Street Furniture and Tree Planting Zone - 2,200 Linear Feet	pedestrian	2008	\$24,750	2009	\$165,000	\$189,750	City	TAD, LCI, SAFTEA	City	\$57,750
New Franklin Street - Street Trees - 44	pedestrian	2008	\$3,960	2009	\$26,400	\$30,360	City	TAD, LCI, SAFTEA	City	\$9,240
New Franklin Street - Pedestrian Lights - 44	pedestrian	2008	\$23,100	2009	\$154,000	\$177,100	City	TAD, LCI, SAFTEA	City	\$53,900
Relocated Center Street - Land Acquisition - 90 N. Avondale Rd (PID 15 249 15 009)	pedestrian, roadway operations	n/a	\$21,360	n/a	\$142,400	\$163,760	City	TAD, DDA	City	\$163,760

Transportation Projects

Description	Type of Improvement	Engineering Year	Engineering Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source	City Amount
Relocated Center Street - Roadway Improvements - 250 Linear Feet	roadway operations	2009	\$6,563	2010	\$43,750	\$50,313	City	TAD, DDA	City	\$50,313
Relocated Center Street - 10' Sidewalk Clear Zone - 500 Linear Feet	pedestrian	2009	\$3,750	2010	\$25,000	\$28,750	City	TAD, LCI, SAFTEA	City	\$8,750
Relocated Center Street - 5' Brick Street Furniture and Tree Planting Zone - 250 Linear Feet	pedestrian	2009	\$5,625	2010	\$37,500	\$43,125	City	TAD, LCI, SAFTEA	City	\$13,125
Relocated Center Street - Street Trees - 10	pedestrian	2009	\$900	2010	\$6,000	\$6,900	City	TAD, LCI, SAFTEA	City	\$2,100
Relocated Center Street - Pedestrian Lights - 10	pedestrian	2009	\$5,250	2010	\$35,000	\$40,250	City	TAD, LCI, SAFTEA	City	\$12,250
Extended Elm Street - Land Acquisition - 2804 E. College Ave (PID 15 248 21 008)	pedestrian, roadway operations	n/a	\$2,235	n/a	\$14,900	\$17,135	City, Private	TAD, DDA, Private	City, Private	\$17,135
Extended Elm Street - Land Acquisition - 2806 E. College Ave (PID 15 248 21 018)	pedestrian, roadway operations	n/a	\$11,025	n/a	\$73,500	\$84,525	City, Private	TAD, DDA, Private	City, Private	\$84,525
Extended Elm Street - Roadway Improvements - 375 Linear Feet	roadway operations	2009	\$9,844	2010	\$65,625	\$75,469	City, Private	TAD, DDA, Private	City, Private	\$75,469
Extended Elm Street - 5' Sidewalk Clear Zone - 750 Linear Feet	pedestrian	2009	\$2,813	2010	\$18,750	\$21,563	City, Private	TAD, LCI, SAFTEA	City, Private	\$6,563
Extended Elm Street - 7' Grass Street Furniture and Tree Planting Zone - 750 Linear Feet	pedestrian	2009	\$788	2010	\$5,250	\$6,038	City, Private	TAD, LCI, SAFTEA	City, Private	\$1,838
Extended Elm Street - Street Trees - 16	pedestrian	2009	\$1,440	2010	\$9,600	\$11,040	City, Private	TAD, LCI, SAFTEA, Private	City, Private	\$3,360
Greenway - Stone Mtn Trail to Ashton Place - 1300 Linear Feet	multi-use facility	2007	\$15,600	2008	\$104,000	\$119,600	City, PATH Foundation	SAFTEA, Private	City, Private	\$39,520
Greenway - west side of Ashton Pl - 380 Linear Feet	multi-use facility	2007	\$4,560	2008	\$30,400	\$34,960	City, PATH Foundation	SAFTEA, Private	City, Private	\$11,552
Sidewalk - north side Franklin St between Olive and Locust Sts - 5' Clear + 1' Grass - 775 Linear Feet	pedestrian	2006	\$3,488	2007	\$23,250	\$26,738	City	SAFTEA, LCI	City	\$8,835
Sidewalk - south side Franklin St between Olive and Oak Sts - 5' Clear + 1' Grass - 890 Linear Feet	pedestrian	2006	\$4,005	2007	\$26,700	\$30,705	City	SAFTEA, LCI	City	\$10,146
Sidewalk - both sides Olive, Pine, Locust, Oak south of Franklin - 5' Clear + 1' Grass - 2330 Linear Feet	pedestrian	2007	\$10,485	2008	\$69,900	\$80,385	City	SAFTEA, LCI	City	\$26,562
Sidewalk - both sides Lake St south of Franklin - 5' Clear + 1' Grass - 620 Linear Feet	pedestrian	2007	\$2,790	2007	\$18,600	\$21,390	City	SAFTEA, LCI	City	\$7,068

Transportation Projects

Description	Type of Improvement	Engineering Year	Engineering Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source	City Amount
Sidewalk - east side Maple St - 5' Clear + 1' Grass - 590 Linear Feet	pedestrian	2008	\$2,655	2007	\$17,700	\$20,355	City	SAFTEA, LCI	City	\$6,726
Sidewalk - north side Washington St - 5' Clear + 1' Grass - 960 Linear Feet	pedestrian	2008	\$4,320	2007	\$28,800	\$33,120	City	SAFTEA, LCI	City	\$10,944
Sidewalk - south side Washington St - 5' Clear + 1' Grass - 1100 Linear Feet	pedestrian	2008	\$4,950	2007	\$33,000	\$37,950	City	SAFTEA, LCI	City	\$12,540
Sidewalk - both sides Olive, Pine, Locust, Oak north of Franklin - 5' Clear + 1' Grass - 3680 Linear Feet	pedestrian	2009	\$16,560	2008	\$110,400	\$126,960	City	SAFTEA, LCI	City	\$41,952
Sidewalk - east side Laredo Dr - 5' Clear + 1' Grass - 660 Linear Feet	pedestrian	2010	\$2,970	2009	\$19,800	\$22,770	City	SAFTEA, LCI	City	\$7,524
Sidewalk - both sides Franklin St west of Olive St - 5' Clear + 1' Grass - 1500 Linear Feet	pedestrian	2011	\$6,750	2010	\$45,000	\$51,750	City	SAFTEA, LCI	City	\$17,100
Install striped "piano bar" crosswalks at up to 10 intersections	pedestrian	2006	\$1,500	2007	\$10,000	\$11,500	City	SAFTEA, LCI	City	\$3,800
Laredo Dr, Parry St, N. Clarendon Ave Intersection - Land Acquisition	roadway operations	n/a	\$6,000	n/a	\$40,000	\$46,000	City	TAD	City	\$15,200
Intersection reconfiguration - Laredo Drive, Parry Street, N. Clarendon Ave - Roadway	roadway operations	2010	\$20,000	2011	\$210,000	\$230,000	City	SAFTEA	City	\$66,000
Center St pedestrian zone/paseo	pedestrian	2011	\$22,500	2011	\$150,000	\$172,500	City	SAFTEA, LCI	City	\$57,000
Franklin St traffic circles at Pine and Locust Sts	roadway operations	2007	\$900	2008	\$6,000	\$6,900	City	SAFTEA	City	\$2,280
Explore the feasibility of the proposed possible Avondale Bypass	planning	2005	Staff Time	n/a	Staff Time	Staff Time	City	n/a	n/a	n/a
Provide 10 bike racks at key commercial sites throughout the Study Area.	bicycle	2005	\$450	2006	\$3,000	\$3,450	City/Private	TAD, Private	City, Private	n/a
Work with GDOT, Decatur, and DeKalb Co. to redesignate SR 10/US 278 out of Avondale Estates	planning	2005+	Staff Time	n/a	Staff Time	Staff Time	City	n/a	n/a	n/a
Work with MARTA to provide one or two shelters with posted schedules along N. Avondale Rd	transit	2005	Staff Time	n/a	Staff Time	Staff Time	City	n/a	n/a	n/a

\$2,451,133

Totals	\$478,141	\$3,179,275	\$3,657,416
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Marketing Projects

Description/Action	Cost	Year	Responsible Party	Funding Source
Prepare Real Estate Inventory				
Prepare an inventory of existing sites/buildings within the redevelopment area that includes ownership, condition, use, value of land, lease rates/terms, etc.	Staff Time	2005	City	City
Based on the real estate inventory, rank sites according to near term or long term initiatives based on their locational importance and/or potential	Staff Time	2005	City	City
Prepare collateral specification sheets for each targeted site	Staff Time	2005	City	City
Implement a Public Relations Program				
Create a brand identity for the study area to be used in all marketing initiatives	Staff Time/\$5,000	2005	City/Vendor	City
Develop collateral marketing materials (i.e., CD-ROMs, market opportunity fact sheets, prospect packages, etc.) specifying potential redevelopment opportunities in the study area	\$25,000	2005-2006	Vendor	City
Work with the local media to keep primary target markets, realtors, developers and prospective businesses up to date on development activity	Staff Time/Volunteer	2005+	City	City
Organize a speaker's bureau with an ongoing presentation schedule to publicize the effort, progress and results of the redevelopment plan	Staff Time	2005-2006	City	City
Initiate a Businesses Recruitment Campaign				
Assemble a business development team	Staff Time	2005	City	City
Target businesses based on the findings of the market study and rank them as near term and long term prospects	Staff Time	2005	City	City
Prepare a business recruitment package based on the findings of the market analysis	Staff Time/\$20,000	2005-2006	City/Vendor	City
Create and maintain referral networks with area brokers, economic development agencies, developers, etc.	Staff Time	2005+	City	City
Develop a database to track prospects	Staff Time	2005+	City	City
Implement advertising/direct mail campaigns with follow-up call programs	\$50,000+	2006+	Vendor	City
Provide Development/Relocation Incentives				
Offer relocation assistance to businesses/uses poorly suited for the study area	Staff Time	2004-2005	City	City

Description/Action	Cost	Year	Responsible Party	Funding Source
If possible, bring available land "to the table"	Staff Time	2005+	City	City
Consider economic incentives such as low interest loans or tax breaks	Staff Time	2004+	City	City
Develop an Internet Presence				
Continue to promote www.avondaleestates.org as a website that communicates its identity to existing and prospective businesses, residents and customers.	Staff Time	2005-2006	Vendor	City
Use the website to post development progress, business listings, residential and commercial real estate information, special events, development incentives, etc.	Staff Time	2005+	City	City
Enable developers and prospective businesses to access downloadable recruitment material and applications	Staff Time	2005+	City	City
Ensure that Resources are Set Aside on an Annual Basis to Maintain Ongoing Marketing Initiatives	Staff Time	2005+	City	City
Totals	\$95,000			

Other Local Initiatives

Description/Action	Cost	Year	Responsible Party	Funding Source
Town Green - Land Acquisition - 64 N. Avondale Rd (PID 15 249 16 008) - 0.75 ac	\$740,000	2007	Private, City	Private, City
Town Green - Improvements - 0.75 ac	\$150,000	2007	Private, City	Private, City
Ashton Place Park - Improvements - 0.5 ac	\$15,000	2005	Private, City	Private, City
Franklin Street Eastern Plaza - Improvements - 0.15 ac	\$60,000	2009	City	City, TAD
Oak and Washington Sts Park - Land Acquisition - 2904 Washington St (PID 15 248 26 004) - 0.15 ac	\$70,000	2009	Private, City	Private, City
Oak and Washington Sts Park - Land Acquisition - 2910 Washington St (PID 15 248 26 005) - 0.25 ac	\$117,000	2009	Private, City	Private, City
Oak and Washington Sts Park - Improvements	\$40,000	2010	Private, City	Private, City
Relocated Post Office	\$1,250,000	2011	US Postal Svc, City	US Postal Svc, City
Relocated Fire Station (excluding land)	\$2,500,000	2005	DeKalb County, City	DeKalb County, City
Totals	\$4,942,000			

Section 4: Appendix

- 4.1 Existing Market Conditions**
- 4.2 Market Analysis**
- 4.3 Density Calculations**
- 4.4 Agendas and Sign-in Sheets**
- 4.5 On-line Survey Results**

EXISTING MARKET CONDITIONS

DEMOGRAPHIC PROFILE

The socioeconomic characteristics of the residential and retail market areas that surround Avondale Estates are provided in this section. The residential market area is comprised of a 10-mile radius from the intersection of Avondale Road and Clarendon Avenue and is the area from which new housing developed in the study area will draw a majority (i.e., 70%) of prospective owners and renters.

The retail market area is divided according to a local and a greater market area. The local retail market area population (defined by a 5-minute drive from the intersection of Avondale Road and Clarendon Avenue) will rely most heavily on Avondale Estates for convenience related goods and services. The greater retail market area is a much larger area (defined by a 10-minute drive) and is the geographic area from which the large majority of potential customers emanate, based on drive time estimates, geographic and man-made boundaries and the location of existing competitive shopping centers.

The delineation of the residential and retail market areas is not meant to suggest that prospective customers of study area businesses and residents of newly developed housing will be drawn solely from these geographic areas. Because of the study area's location, historic character and proposed redevelopment activity, it is expected that prospective retail customers and residents will also be attracted to the study area from outside of the corresponding market areas. A map illustrating the boundaries of the residential and retail market areas is provided on the following page.

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

Population & Household Growth

Exhibit S-1 shows a decade of moderate growth within Avondale Estates and the retail and residential market areas, below Atlanta MSA and state levels. Avondale Estate's 2002 population is estimated at 2,620, increasing at an annual rate of 0.63% or by 15 persons per year since 1990. During the 2003-2008 period, population growth within Avondale Estates is expected to increase to 0.91% annually or by 24 persons per year. While the annual rate at which households grew within Avondale Estates was below population growth over the last decade (0.46% annually), the household growth rate is expected to surpass population growth from 2003-2008 (1.03%).

In the retail market area, 2003 local retail market area population is estimated at 81,692 and 346,796 persons within the greater retail market area. Average annual population growth within the local retail market area (1.42%) outpaced greater retail market area growth (0.99%) since 1990, a trend that is expected to continue over the next five years (1.21% and 1.15%, respectively). Similar to Avondale Estates, household growth in both areas was below population growth in the 1990s, but will outpace population growth from 2003-2008.

RESIDENTIAL AND RETAIL MARKET AREAS

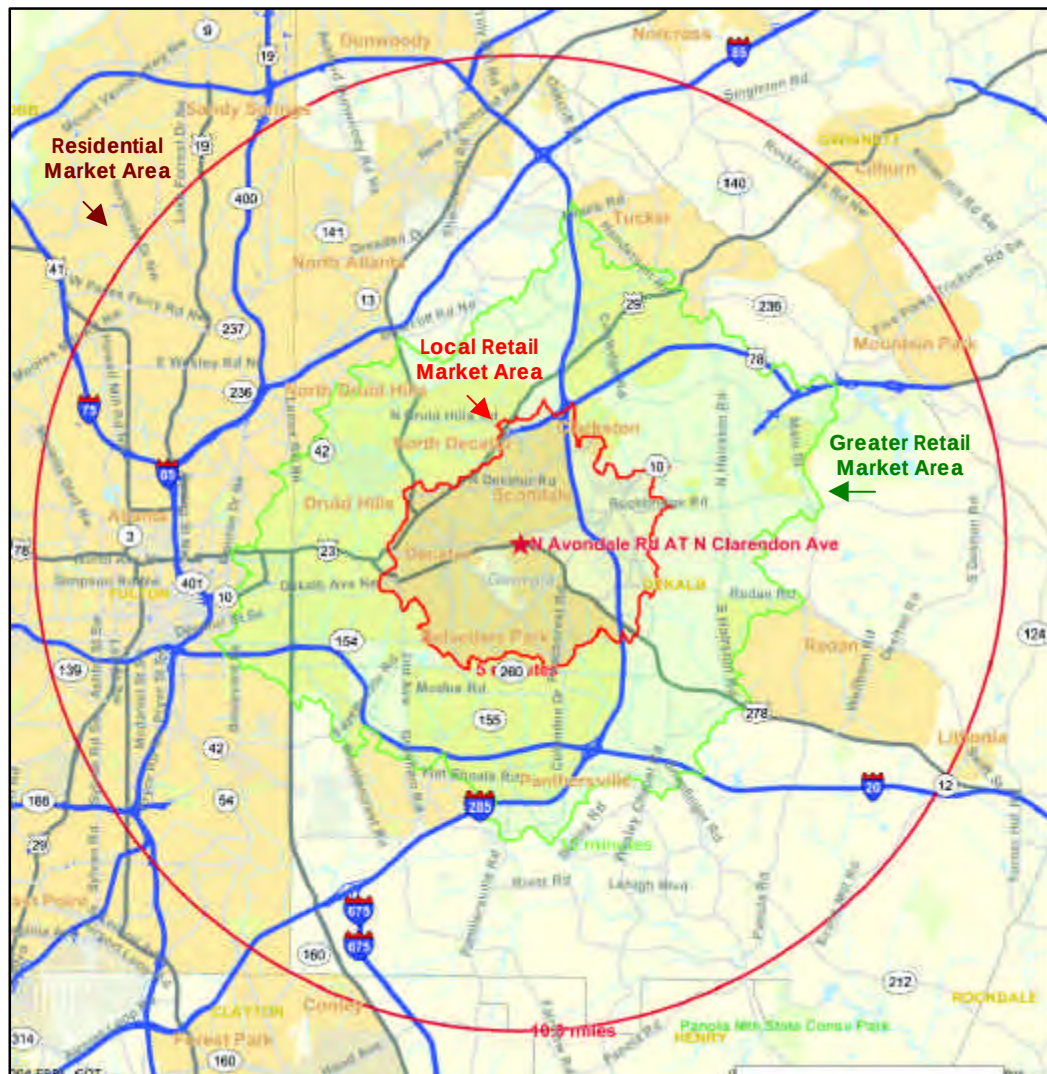
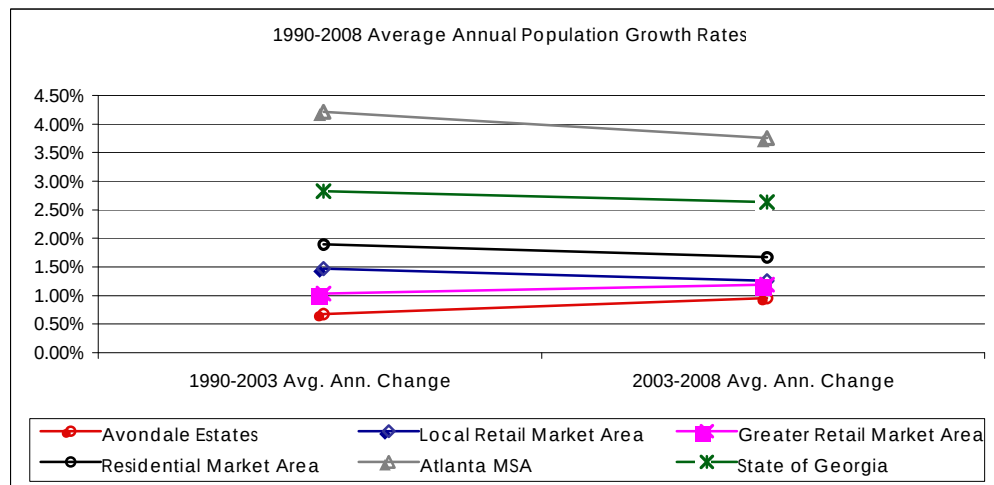


EXHIBIT S-1

POPULATION GROWTH

Avondale Estates, Local Retail Market Area, Greater Retail Market Area, Residential Market Area,
Atlanta MSA and State of Georgia
1990-2008

Geographic Area	1990	Avg. Ann. Change 1990-2003			Avg. Ann. Change 2003-2008		
		2003 (Estimate)	Number	Percent	2008 (Forecast)	Number	Percent
Avondale Estates							
Population	2,422	2,620	15	0.63%	2,739	24	0.91%
Households	1,157	1,226	5	0.46%	1,289	13	1.03%
Avg. Household Size	2.09	2.13	0.003		2.11	-0.004	
Local Retail Market Area							
Population	68,957	81,692	980	1.42%	86,645	991	1.21%
Households	27,834	31,710	298	1.07%	33,928	444	1.40%
Avg. Household Size	2.40	2.44	0.003		2.43	-0.002	
Greater Retail Market Area							
Population	307,289	346,796	3,039	0.99%	366,656	3,972	1.15%
Households	119,292	133,928	1,126	0.94%	142,660	1,746	1.30%
Avg. Household Size	2.52	2.51	-0.001		2.50	-0.002	
Residential Market Area							
Population	778,603	965,329	14,364	1.84%	1,043,651	15,664	1.62%
Households	307,866	370,761	4,838	1.57%	403,450	6,538	1.76%
Avg. Household Size	2.43	2.49	0.005		2.49	0.000	
Atlanta MSA							
Population	2,959,950	4,563,299	123,335	4.17%	5,409,173	169,175	3.71%
Households	1,102,578	1,660,786	42,939	3.89%	1,973,490	62,541	3.77%
Avg. Household Size	2.64	2.70	0.005		2.70	0.000	
State of Georgia							
Population	6,478,216	8,813,345	179,625	2.77%	9,955,004	228,332	2.59%
Households	2,366,615	3,232,700	66,622	2.82%	3,672,185	87,897	2.72%
Avg. Household Size	2.66	2.65	-0.001		2.65	0.000	



Source: ESRI BIS

From 1990-2003 population within the residential market area outpaced growth levels in Avondale Estates as well as both retail market areas but remained below MSA and state levels. Between 2003 and 2008, however, the average annual population growth rate in the residential market area is expected to drop from 1.84% to 1.62%, while growth rates are expected to increase in Avondale Estates and in the greater and local retail market areas. Numerically, population growth is expected to increase from 4,838 to 6,538 persons per year in the residential market area during the five-year period.

Between 1990 and 2003, population growth within the Atlanta MSA was extremely strong, increasing at an average rate of 4.17% annually. In the 1990s, population growth within the Atlanta MSA was largely fueled by a booming economy. Between 2003 and 2008, population growth in the Atlanta MSA is expected to remain strong but decrease to 3.71%.

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

In the past few decades, household size declined nationally due to a decrease in fertility rates, increasing divorces and single person households and a rise in the elderly population. Exhibit S-1 shows that over the next five years, household size is expected to slightly decline or remain constant in each of the six geographic areas.

Age Distribution

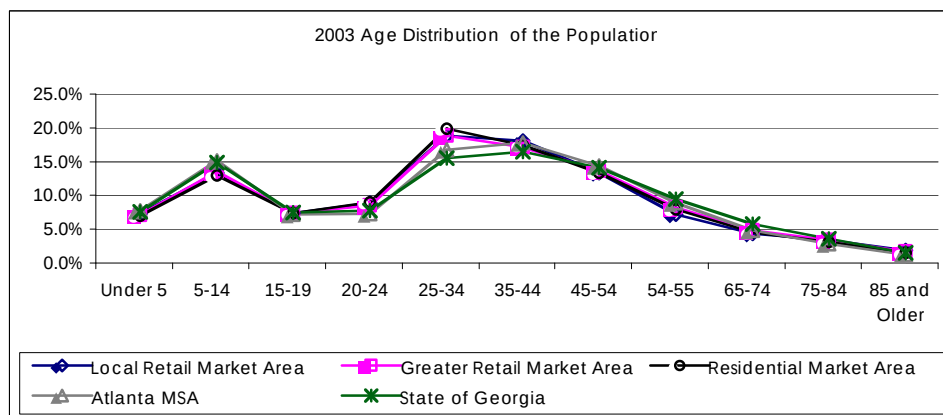
The age distribution of the retail and residential market area populations are slightly younger but comparable to Atlanta MSA and state populations. The 2003 median age within the retail market area is estimated at 33.0 years within the local retail market area and 33.2 years within the greater retail market area. The residential market area population is slightly younger (32.8 years) than the retail market area populations as well as the Atlanta MSA (34.2 years) and state (34.6 years) populations (Exhibit S-2 on the following page). In Avondale Estates, the 2003 estimated median age is 42.4 years.

Within the residential and retail market areas, the estimated proportion of the population under the age of 15 in 2003 ranges from 19% to 20%, below 22% within the MSA and state of Georgia. Fifteen to sixteen percent (15% to 16%) of the residential and retail market area populations are age 15 to 24, comparable to the MSA (14%) and the state (15%). Prime consumer age categories, 25 to 64, make up 56% to 57% of the residential and retail market area populations, equal to or above the Atlanta MSA (56%) and statewide (54%) proportions. Eight to nine percent (8% to 9%) of residential and retail market area residents are over 65 years of age, equal to or below MSA (8%) and state (10%) proportions.

EXHIBIT S-2

POPULATION BY AGE
Local Retail Market Area, Greater Retail Market Area, Residential Market Area, Atlanta MSA
and State of Georgia
2003

Age Category	Local Retail Market Area	Greater Retail Market Area	Residential Market Area	Atlanta MSA	State of Georgia
Under 5	6.9%	6.7%	6.6%	7.4%	7.2%
5-14	13.0%	13.2%	12.7%	14.8%	14.6%
15-19	7.0%	6.9%	7.0%	6.8%	7.1%
20-24	8.5%	8.1%	8.6%	6.9%	7.4%
25-34	18.5%	18.5%	19.5%	16.4%	15.2%
35-44	17.8%	16.8%	17.0%	17.5%	16.1%
45-54	13.0%	13.3%	13.0%	14.1%	13.8%
55-64	6.8%	7.8%	7.6%	8.4%	9.0%
65-74	3.9%	4.4%	4.1%	4.4%	5.4%
75-84	3.0%	3.0%	2.7%	2.5%	3.2%
85 and Older	1.5%	1.3%	1.1%	0.9%	1.1%
Total	81,692	346,796	965,329	4,563,299	8,813,345
Median Age	33.0	33.2	32.8	34.2	34.6



Source: ESRI BIS

Household Income Distribution

Exhibit S-3 shows that retail and residential market area residents are less affluent than households within the Atlanta MSA (an estimated median income of \$59,515 in 2003) but have incomes more in-line with households throughout the state (\$48,001). The estimated 2003 market area median household income within the retail market area is \$44,462 within the local retail market area households and \$49,193 in the greater retail market area. The 2003 residential market area median household income is higher, estimated at \$51,567. Households within Avondale Estates are more affluent, with a 2003 estimated median income of \$73,566.

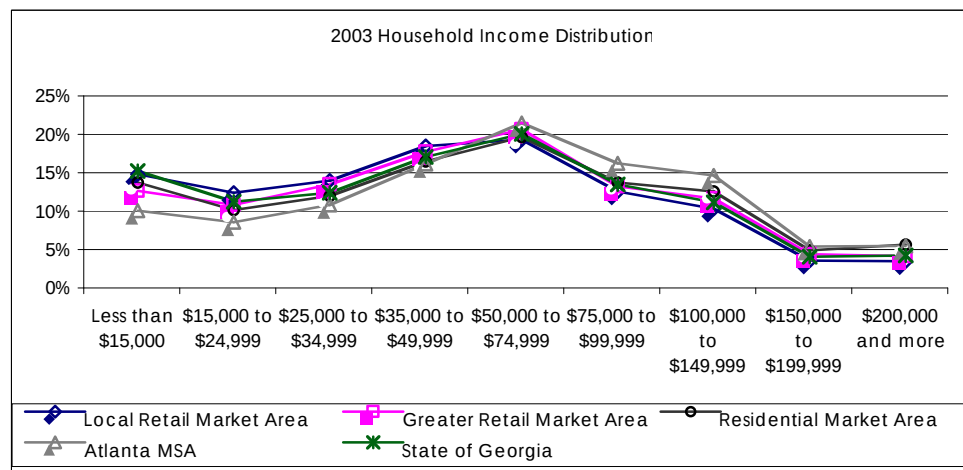
The 2003 estimated income distribution for households residing within the retail and residential market area shows that 22% to 25% of the households have annual incomes of less than \$25,000, compared to 17% in the Atlanta MSA and 24% in the state of Georgia. An estimated 27% to 30% of the households in the

retail and residential market areas have incomes from \$25,000 to \$49,999, generally above MSA (25%) and state (28%) proportions. Thirty to thirty-two percent (30% to 32%) of retail and residential market area households have annual incomes between \$50,000 and \$99,999, equal to or below households within the Atlanta MSA (36%) and state (32%). An estimated 12% to 16% of retail and residential market area households have incomes between \$100,000 and \$199,999, below the MSA (18%) but comparable to the state (13%). Three percent (3%) of retail market area households and 5% of residential market area households have incomes exceeding \$200,000, compared to 5% in the MSA and 3% statewide.

EXHIBIT S-3

HOUSEHOLD INCOME
Local Retail Market Area, Greater Retail Market Area, Residential Market Area, Atlanta MSA
and State of Georgia
2003

Income	Local Retail Market Area	Greater Retail Market Area	Residential Market Area	Atlanta MSA	State of Georgia
Less than \$15,000	13.8%	11.7%	12.8%	9.1%	14.2%
\$15,000 to \$24,999	11.4%	9.9%	9.2%	7.6%	10.2%
\$25,000 to \$34,999	13.0%	12.5%	11.0%	9.8%	11.4%
\$35,000 to \$49,999	17.5%	16.7%	15.5%	15.1%	16.1%
\$50,000 to \$74,999	18.3%	19.7%	18.6%	20.5%	19.1%
\$75,000 to \$99,999	11.6%	12.2%	12.7%	15.2%	12.5%
\$100,000 to \$149,999	9.3%	10.7%	11.6%	13.7%	10.1%
\$150,000 to \$199,999	2.6%	3.4%	3.9%	4.4%	3.1%
\$200,000 and more	2.5%	3.2%	4.7%	4.5%	3.2%
Total	31,710	133,928	370,761	1,660,786	3,232,700
Median	\$44,462	\$49,193	\$51,567	\$59,515	\$48,001



Source: ESRI BIS

Racial Composition

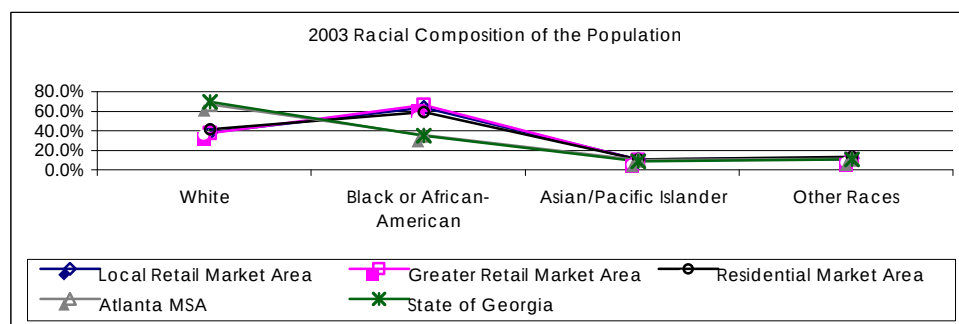
The 2003 estimated racial distribution for the retail and residential market areas reveal a racially and ethnically diverse population. An estimated 53% to 61%

of retail and residential market area residents are black or African-American, 31% to 35% are white, 4% to 5% are Asian/Pacific Islander and 5% to 7% are categorized within “other” racial groups (Exhibit S-4). Over the next few years, the retail and residential market areas’ population are expected to become slightly more diverse with growing proportions of residents who are black or African-American, Asian/Pacific Islander, Hispanic or fall within “other” racial groups.

Exhibit S-4

RACIAL COMPOSITION
Local Retail Market Area, Greater Retail Market Area, Residential Market Area, Atlanta MSA
and State of Georgia
2003

Race	Local Retail Market Area	Greater Retail Market Area	Residential Market Area	Atlanta MSA	State of Georgia
White	31.8%	31.2%	35.2%	61.1%	63.8%
Black or African-American	57.9%	60.6%	53.2%	29.6%	29.0%
Asian/Pacific Islander	4.6%	3.8%	4.5%	3.8%	2.5%
Other Races	5.7%	4.5%	7.1%	5.4%	4.7%
Total	81,692	346,796	965,329	4,563,299	8,813,345
Hispanic (any race)	4.2%	4.4%	10.1%	7.9%	6.4%



Source: ESRI BIS

The racial distribution of the MSA and state populations are similar to each other but differ significantly from retail and residential market area populations. Within the MSA in 2003, an estimated 61% of the population is white, 30% is black or African-American, 4% is Asian/Pacific and 5% fall into “other” racial or ethnic groups. Statewide, the distribution is 64%, 29%, 3% and 5%, respectively.

The proportion of the retail and residential market area populations that are Hispanic ranges from 4% in the local and greater retail market areas and as high as 10% within the residential market area. Eight percent (8%) of MSA residents are Hispanic, above 6% statewide.

E. Lifestyle Characteristics

ACORN – A Classification of Residential Neighborhoods – categorizes neighborhoods throughout the nation into specific consumer groups or market segments. Neighborhoods are geographically defined by Census blocks, which are analyzed and sorted by over 60 characteristics including income, occupation, household type, age and other determinants of consumer

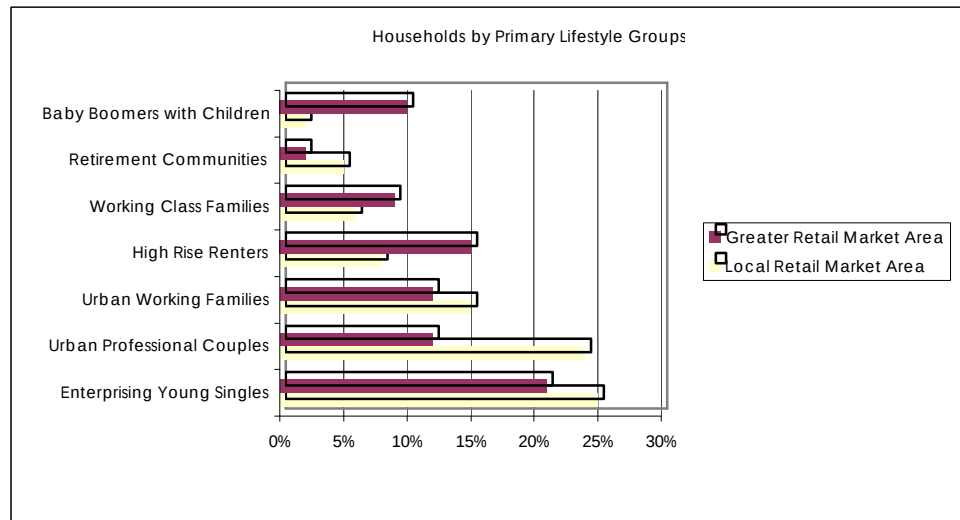
behavior. Lifestyle data reveals that people who share the same demographic characteristics may have widely divergent desires and preferences.

Households within the local and greater retail market areas have been grouped into clusters or segments that bear descriptive names meant to convey a type of neighborhood or lifestyle. Exhibit S-5 shows the primary Lifestyle groups within both areas, with a more detailed account of the characteristics of each provided in the following summaries. ACORN Lifestyle Reports are provided by ESRI Business Information Solutions (ESRI BIS).

EXHIBIT S-5

HOUSEHOLDS BY PRIMARY LIFESTYLE GROUPS
Local and Greater Retail Market Areas
2003

Lifestyle Group	Local Retail Market Area	Greater Retail Market Area
	Percent of Households	Percent of Households
Enterprising Young Singles	25%	21%
Urban Professional Couples	24%	12%
Urban Working Families	15%	12%
High Rise Renters	8%	15%
Working Class Families	6%	9%
Retirement Communities	5%	2%
Baby Boomers with Children	2%	10%
Total	85%	81%



Source: ESRI BIS

1. Enterprising Young Singles

Socioeconomic

- Young and mobile households.
- Live alone or share housing with a single roommate.
- Despite youth, incomes are slightly above average.
- High labor force participation.

Residential

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

Preferences

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

2. Urban Professional CouplesSocioeconomic

- Slightly older than average.
- Mostly married couples with few children but many single person and shared households.
- Median income is 25% above the national median.
- Well educated with good jobs, mainly professional and managerial positions.

Residential

- Owner-occupancy prevails with a mix of single-family homes and townhouses.
- Homes are valued above average.

Preferences

- One of the top groups for consumption of imported wine, listening to classical music, domestic and foreign travel and visiting museums.
- Spend heavily on home furnishings and improvements.
- Prefer to dine out as opposed to entertaining.
- Sports enthusiasts, play golf, bicycle, jog and tennis.
- Belong to AAA, health clubs and frequent flyer clubs.
- Read two or more newspapers per day and a variety of magazines.

3. Urban Working FamiliesSocioeconomic

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

Residential

- Frequently live in older townhouse or small multifamily developments.
- Majority are renters.
- Among homeowners, homes typically have below average values.

Preferences

- Buy lottery tickets, hair and skin products, infant and children’s products

and clothing.

- Enjoy team sports, such as football and basketball.
- Dine out at fast food establishments.

4. High Rise Renters

Socioeconomic

- One-half are single person households; 20% are shared households.
- Younger households.
- Ethnically and racially diverse.
- Well educated and well employed with growing/above average incomes.
- Often work in professional or managerial positions.

Residential

- Urban, mobile, apartment dwellers.
- Rents are 50% above the national average.

Preferences

- Leisure time is singles oriented.
- Belong to health clubs and environmental groups.
- Enjoy nightclubs, dancing and adult educational classes.
- Spend heavily on apparel.

5. Working Class Families

Socioeconomic

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

Residential

- Live in dense, urban neighborhoods.
- Medium and high density housing is common.
- Median home value is below average.

Preferences

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

6. Retirement Communities

Socioeconomic

- Older but not necessarily elderly with a median age of 40 years.
 - Single-person households make up one-third of all households, followed by married couples without children.
 - Above average incomes.
 - Well educated and those that are still working are employed in professional jobs.
-

Residential

- A majority of these households live in congregate housing where meals are included in the rent.
- Live in communities where homes are valued above average.

Preferences

- Enjoy playing sports – golfing, bicycling, camping and weight training.
- Listen to classical music, frequently travel (foreign more than domestic), dine out and are active investors.
- Buy furniture, sports equipment, VCRs and apparel.

7. Baby Boomers with ChildrenSocioeconomic

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

Residential

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

Preferences

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

The seven Lifestyle groups summarized above account for more than four-fifths of local and greater retail market area households. Although all of the Lifestyle groups are unique, many share certain characteristics. Greater and local retail market area households generally have active, urban lifestyles and may own or rent their homes. While a large share of these households are younger, single and childless (*Enterprising Young Singles*, *High Rise Renters*), many are slightly older with children at home. Incomes vary but most have above average – or potentially above average – incomes. As *Enterprising Young Singles* and *Urban Professional Couples* (particularly in the local retail market area) account for a sizable share of households, their characteristics – i.e., housing and retail preferences – should be closely evaluated. To provide a snapshot of the characteristics of all retail market area households, Exhibit S-6 on the following page summarizes the housing preferences and socioeconomic rankings of the all lifestyle groups within the greater and local retail market areas.

EXHIBIT S-6

HOUSEHOLDS BY LIFESTYLE GROUP AND TYPE
Local and Greater Retail Market Areas
2003

Lifestyle Group	Local Retail Market Area		Greater Retail Market Area		Socio-Econ Rank (1-40)	Housing Type	Household Type	Percent Living in Owner-Occupied Units
	Number	Percent of HHS	Number	Percent of HHS				
Affluent Families	124	0.4%	10,439	7.8%				
Top One Percent	124	0.4%	1,908	1.4%	1	Single-Family	Married, No Children	84%
Wealthy Seaboard Suburbs	0	0.0%	2,317	1.7%	3	Single-Family	Married, No Children	94%
Upper Income Empty Nesters	0	0.0%	3,532	2.6%	5	Single-Family	Married, No Children	87%
Prosperous Baby Boomers	0	0.0%	521	0.4%	6	Single-Family	Married w/Children	74%
Semirural Lifestyle	0	0.0%	2,161	1.6%	7	Single-Family	Married w/Children	84%
Upscale Households	8,930	28.2%	31,303	23.4%				
Urban Professional Couples	7,489	23.6%	16,402	12.2%	8	Single-Family	Married Couples	61%
Baby Boomers with Children	639	2.0%	12,733	9.5%	16	Single-Family	Married w/Children	69%
Thriving Immigrants	0	0.0%	189	0.1%	14	Single-Family	Married Couples	59%
Older, Settled Married Couples	802	2.5%	1,979	1.5%	15	Single-Family	Married Couples	81%
Up and Coming Singles	10,324	32.6%	47,745	35.6%				
High Rise Renters	2,446	7.7%	19,427	14.5%	4	High-Rise Units	Single Person	32%
Enterprising, Young Singles	7,878	24.8%	28,318	21.1%	9	Multi-Unit	Single Person	24%
Retirement Styles	2,940	9.3%	6,576	4.9%				
Retirement Communities	1,495	4.7%	2,255	1.7%	12	High-Rise Units	Single Person	49%
Active Senior Singles	1,445	4.6%	3,757	2.8%	17	Multi-Unit	Single Person	43%
Prosperous Older Couples	0	0.0%	564	0.4%	11	Single-Family	Married, No Children	81%
Young Mobile Adults	255	0.8%	3,242	2.4%				
Twentysomethings	0	0.0%	2,254	1.7%	27	Multi-Unit	Single Person	22%
College Campuses	255	0.8%	988	0.7%	29	Garden Apartments	Single w/Shared HH	17%
City Dwellers	3,724	11.7%	14,686	11.0%				
Working Class Families	1,995	6.3%	11,829	8.8%	30	Single-Family	Family HH	69%
Newly Formed Households	825	2.6%	1,673	1.2%	19	Single-Family	Family HH	53%
Southwestern Families	0	0.0%	0	0.0%	34	Single-Family	Families w/ Children	57%
West Coast Immigrants	904	2.9%	1,184	0.9%	33	Garden Apartments	Married w/ Children	31%
Downtown Residents	5,413	17.1%	19,937	14.9%				
Social Security Dependents	0	0.0%	444	0.3%	37	High-Rise Units	Single Person	20%
Distressed Neighborhoods	681	2.1%	1,524	1.1%	40	Garden Apartments	Single Person	17%
Hardtimes	0	0.0%	1,673	1.2%	39	Single Attached	Single Person	43%
Urban Working Families	4,732	14.9%	16,296	12.2%	35	Single Attached	Mixed Types	41%
Total	31,710	100.0%	133,928	100.0%				

Source: ERSI BIS

F. Employment Trends

Nationwide

Following the nation's longest and most aggressive expansion in history, the U.S. economy's growth essentially halted in 2001 and was further weakened by the September 11 terrorist attacks. While the recession was declared over two years ago, the economy is just now showing signs of a meaningful recovery. The Selig Center for Economic Growth at the University of Georgia predicts that the economy will grow 3.5% in 2004, up from an estimated 2.7% in 2003.

Despite improved economic growth, employment continues to suffer. Coined a "job loss" recovery, nationwide employment has decreased by 1.3% in the past two years translating into 1.7 million jobs lost. Net job gains, albeit slight, are just beginning to take hold. Limited venture capital, professional and white-collar job outsourcing, increased productivity and uncertainty have all

contributed to a “job loss” recovery. The Selig Center predicts that employment will increase by 1% in 2004 but that unemployment will remain above 6%.

Georgia, Atlanta MSA and DeKalb County

While Georgia was among the first and hardest hit states by the recession, it has been among the first showing signs of recovery. The Selig Center predicts that in 2004 and 2005, Georgia’s economic growth will outpace growth nationwide, being among the top states in the nation in terms of growth.

Statewide employment began to increase in April 2003, five months before the nation reported employment gains. In 2004, a 1.5% increase in employment is forecasted for Georgia. The gross state product is expected to increase by 4% in 2004, compared to a 3.5% increase in gross domestic product. The Selig Center predicts that despite jobs gains, the number of persons looking for work will increase at a faster pace, which will increase the unemployment rate from 5.0% in 2003 to 5.3% in 2004.

Similar to national trends, statewide service-producing employment sectors are expected to experience job gains in 2004 while good-producing jobs will further shrink. Since 1998, Georgia has lost 99,400 manufacturing jobs. While manufacturing jobs are expected to undergo further losses in 2004, the decline will be far less: only 1,300 jobs. Construction employment will taper off in 2004 as mortgage rates rise, resulting in an estimated 2.7% drop in employment. Professional and business services are expected to gain the most jobs.

Much of the state’s job growth will be concentrated in the Atlanta MSA. More than 76% of new jobs created in the state will be in the Atlanta MSA, down from 90% in 2003. An estimated 46,100 jobs will be added to the MSA’s employment base, representing a 2.1% increase, above a 1.5% increase statewide. Strong projected employment growth in the Atlanta MSA is largely attributed to a high number of service-producing jobs and few manufacturing and government jobs. While employment growth in the Atlanta MSA will be impeded by losses in the construction sector in 2004, the MSA remains an excellent choice for businesses to locate due to Hartsfield International Airport (the second busiest passenger airport in the world), a large pool of educated and talented workers, a diversified economy, several renowned academic institutions, continued, albeit slower, population growth and an excellent transportation system (e.g., interstate system, rail, transit, etc.).

The Atlanta MSA has the largest economy among Georgia MSAs with an estimated 2,123,183 employees in 2002 (Exhibit S-7). Service producing jobs accounted for the highest share of total employment in 2002 (73%). Within the service producing category, the wholesale and retail trade sectors held a 19% share of total employment in the Atlanta metro area in 2002. Other major employment sectors included accommodation and food services (8%), waste management and remediation services (8%) and health care and social services (8%). Manufacturing supplied 8% of total employment in 2002 and was the largest employment sector within the goods producing category. The construction sector, which is expected to slow in 2004, generated 5% of total jobs. Government jobs accounted for 13% of the region’s jobs in 2002, with

Exhibit S-7

EMPLOYMENT BY MAJOR INDUSTRIAL SECTOR
DeKalb County and Atlanta MSA
2002

Industry	DeKalb County		Atlanta MSA	
	Number	Percent	Number	Percent
Goods Producing	36,573	12%	291,303	14%
Agriculture	~	~	3,260	0%
Mining	~	~	1,585	0%
Construction	13,990	5%	116,390	5%
Manufacturing	21,649	7%	170,068	8%
Service Producing	216,137	73%	1,544,101	73%
Wholesale Trade	18,565	6%	141,541	7%
Retail Trade	34,765	12%	247,405	12%
Transportation & Warehousing	9,212	3%	103,009	5%
Utilities	2,198	1%	10,588	0%
Information	13,870	5%	103,186	5%
Finance and Insurance	12,839	4%	102,477	5%
Real Estate & Rental and Leasing	6,434	2%	39,732	2%
Professional, Scientific	15,438	5%	142,751	7%
Management	15,566	5%	54,783	3%
Waste Management & Remediation	20,804	7%	162,076	8%
Educational Services	3,899	1%	23,347	1%
Health Care & Social Services	31,141	10%	162,217	8%
Arts, Entertainment and Rec	2,112	1%	22,437	1%
Accommodation & Food Services	20,354	7%	169,461	8%
Other Services	8,942	3%	59,091	3%
Government	44,479	15%	281,894	13%
State	9,091	3%	54,331	3%
Local	22,999	8%	180,066	8%
Federal	12,389	4%	47,497	2%
NEC	441	0%	5,885	0%
TOTAL	297,630	100%	2,123,183	100%

* Industry groups does not meet criteria for disclosure

Source: Georgia Department of Labor

the share of local government (8%) jobs surpassing state (3%) and federal government (2%) proportions.

Unemployment within the Atlanta MSA was slightly above the state in 2002 (5.3% compared to 5.1%), jumping from 3.5% in 2001. Unemployment within DeKalb County was higher in 2002, at 6.2%.

Among Georgia counties, DeKalb County ranked 2nd in total employment in 2002 (297,630 employees) and 3rd in wages (\$776 average weekly wages compared to \$687 statewide). In the third quarter of 2001, the largest employers in DeKalb County were: Bellsouth, DeKalb Medical Center, Emory University, General Motors and United Parcel Service. Similar to the MSA, service-producing jobs are the predominate employment sectors in DeKalb County, with trade (retail and wholesale), health care and social services (10%), accommodation and food services (7%) and waste management and remediation services (7%) as the top employers (Exhibit S-7).

Avondale Estates Area

Employment within a one- and two-mile radius of the study area is displayed in Exhibit S-8. Slightly more than 4,000 workers are employed within a one-mile radius in 407 businesses; more than ten times that number (42,292) are employed within a two-mile radius by 2,611 businesses. Service jobs account for the largest share of total employment within both areas, with health related jobs making up more than one-quarter (or 11,040) of total employment within

EXHIBIT S-8

BUSINESSES AND EMPLOYMENT WITHIN A 1-MILE AND 2-MILE RADIUS FROM THE STUDY AREA
2003

Industry	1-Mile Radius				2-Mile Radius			
	Businesses		Employees		Businesses		Employees	
	#	%	#	%	#	%	#	%
Agriculture & Mining	9	2.2%	70	1.7%	30	1.1%	1,040	2.5%
Construction	32	7.9%	403	9.9%	108	4.1%	1,310	3.1%
Manufacturing	43	10.6%	639	15.7%	109	4.2%	2,047	4.8%
Transportation, Communication, Utilities	9	2.2%	102	2.5%	81	3.1%	873	2.1%
Wholesale Trade	21	5.2%	165	4.0%	64	2.5%	485	1.1%
Finance, Insurance & Real Estate	17	4.2%	95	2.3%	210	8.0%	1,129	2.7%
Retail Trade								
Home Improvement & Mobile Homes	5	1.2%	41	1.0%	15	0.6%	99	0.2%
General Merchandise	1	0.2%	1	0.0%	9	0.3%	95	0.2%
Food	8	2.0%	349	8.6%	56	2.1%	926	2.2%
Auto Dealers & Gas Stations	9	2.2%	25	0.6%	76	2.9%	1,308	3.1%
Apparel & Accessories	7	1.7%	29	0.7%	40	1.5%	193	0.5%
Furniture & Home Furnishings	17	4.2%	136	3.3%	66	2.5%	486	1.1%
Eating & Drinking Establishments	15	3.7%	213	5.2%	142	5.4%	1,928	4.6%
Miscellaneous Retail	24	5.9%	66	1.6%	119	4.6%	602	1.4%
Subtotal	86	21.1%	860	21.1%	523	20.0%	5,637	13.3%
Services								
Personal	19	4.7%	54	1.3%	153	5.9%	607	1.4%
Business	23	5.7%	138	3.4%	124	4.7%	1,125	2.7%
Automotive Repair, Services, Parking	47	11.5%	258	6.3%	108	4.1%	931	2.2%
Miscellaneous Repair Services	11	2.7%	19	0.5%	30	1.1%	67	0.2%
Motion Picture	5	1.2%	14	0.3%	15	0.6%	61	0.1%
Amusement & Recreation	11	2.7%	239	5.9%	41	1.6%	614	1.5%
Health	5	1.2%	51	1.3%	263	10.1%	11,040	26.1%
Legal	10	2.5%	29	0.7%	193	7.4%	757	1.8%
Education	9	2.2%	547	13.4%	47	1.8%	1,636	3.9%
Social	5	1.2%	50	1.2%	97	3.7%	1,176	2.8%
Museums, Art Galleries, Botanical, Zoo	0	0.0%	0	0.0%	2	0.1%	4	0.0%
Membership Organizations	22	5.4%	94	2.3%	105	4.0%	538	1.3%
Engineering, Accounting, Research, Mang't	14	3.4%	89	2.2%	96	3.7%	962	2.3%
Hotels and Lodging	0	0.0%	0	0.0%	9	0.3%	217	0.5%
Misc. Services	1	0.2%	1	0.0%	5	0.2%	47	0.1%
Subtotal	182	44.7%	1,583	38.8%	1,288	49.3%	19,782	46.8%
Public Administration	6	1.5%	151	3.7%	190	7.3%	9,946	23.5%
NonClassifiable Establishments	2	0.5%	10	0.2%	8	0.3%	43	0.1%
Total	407	100%	4,078	100%	2,611	100%	42,292	100%

Source: Claritas 2003

a two-mile radius. Located less than two-miles from the study area, DeKalb Medical Center likely contributes a sizable share of these jobs. Retail trade is the second largest employment sector, with a higher share of employment within the one-mile area (21%) than in the two-mile area (13%).

RETAIL PROFILE

Despite worries over the war in Iraq, a slow economic recovery and job layoffs, consumers nationwide continued to spend on retail goods and services in 2003 and are expected to continue to do so in 2004 as the economic outlook improves. Helping to stabilize the retail market has been a drop in retail construction, which fell by an estimated 30% in 2003. This combined with closures helped to keep vacancy rates stable at an estimated 10.2% in 2003 helped rents improve. Low interest rates have helped support retail sales as households that refinance or secure low monthly payments on their new homes can maintain prior spending activity despite a sluggish economy.

Changing consumer preferences are forcing developers to consider retail formats other than enclosed malls and strip development. Discounters such as Wal-Mart and Target are undergoing aggressive expansions and open-air power centers, town centers with grid systems and neighborhood business districts that enable customers to park a few steps from their destination are growing in popularity. Also, malls that offer entertainment venues are attracting more customers than those with traditional tenant mixes.

The Atlanta region's retail sector is expected to outperform other MSAs throughout the nation. Marcus & Millichap's national retail index ranks the Atlanta market 21st out of 38 markets in 2003, largely due to recent and anticipated job gains. Atlanta's 2003 ranking is up 6 points from 2002. The national retail index ranks markets according to forecasted employment and population growth, vacancy, construction, personal income, new home construction and rent growth.

According to statistics published by Dorey Publishing and Information Services, a local commercial real estate database company, in its semi-annual *Dorey's Atlanta Retail Space Guide*, the metro Atlanta retail market contained some 144.7 million square feet of existing space as of the fall/winter of 2003. Dorey's reports approximately 13.6 million square feet of this inventory as available, reflective of a 10% vacancy rate.

Meanwhile, another 4.3 million square feet of space is under construction, according to Dorey. The bulk of this new space is in Midtown (1.1 million square feet), the northeast Gwinnett County submarket (784,762 square feet) and the South Atlanta/Airport submarket (759,900 square feet).

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

Avondale Estates as well as a majority of the shopping centers surveyed are located in Dorey's *East Atlanta* submarket (which also includes downtown

Exhibit R-1

Summary Characteristics of Select Shopping Centers within a 5-Minute Drive of the Study Area

Center/Location Location	Type	Distance (Miles)	GLA	Vacancies		Year Built	Number of Stores	Anchors
				Rate	Space			
1 Avondale Shopping Center 3570 Memorial Dr	Neighborhood	1.47	20,999	33%	7,008	1995	5	Blimpie
2 Dunaire Plaza Memorial Dr at North Decatur	Neighborhood	1.51	32,000	0%	0	1968	15	Advance Auto Parts
3 Avondale Square 3653 Memorial Dr	Community	1.63	145,000	39%	56,135	1980	NA	Am Vets Thrift Store Rhodes Furn., Aaron Rents
4 Twin Oaks 2823 East College Avenue	Neighborhood	1.64	30,000	8%	2,400	1949	13	Salvation Army, Our Way Café, Enterprise Leasing
5 Suburban Plaza 2557 North Decatur Rd	Community	1.66	224,829	9%	20,198	1960	40	Big Lots, Save Rite Picadilly, Family Dollar
6 Service Merchandise Plaza 4570 Memorial Dr	Community	1.67	152,147	53%	80,000	1970	27	Circuit City, Radio Shack Foot Locker
7 Avondale Crossing 1283 Columbia Dr	Community	1.74	116,498	13%	15,700	1958	11	Family Dollar, Skate Center, Rent A Center
8 Commerce Square W Ponce de Leon at Commerce Dr	Neighborhood	1.8	40,000	0%	0	2000	11	CVS
9 North Decatur Square DeKalb Industrial/N. Decatur	Community	1.9	136,334	1%	1,600	1998	35	Kroger, Hollywood Video, Burger King, Dollar Tree
10 Pendley Hills Center Covington Hwy at Redan Rd	Neighborhood	1.91	67,724	5%	3,700	1978	17	Ga. Dept. Of Labor, Beauty Supply, Kingston Meats
11 Belvedere Plaza Shopping Center 3435 Memorial Drive	Regional	1.97	368,065	2%	6,800	1956	65	Maxway, Dollar Tree, Kroger, Blockbuster
12 Rockmor Plaza Memorial Dr at N Decatur	Neighborhood	2.07	38,000	0%	0	1960	17	Rent A Center, Dollar General, Subway
13 North DeKalb Mall 2050 Lawrenceville Hwy	Regional	2.1	626,778	N/A	N/A	1965	94	Stein Mart, Rich's, AMC Theater
14 Covington Place 4060 Covington Highway	Community	2.31	121,691	5%	6,400	1986	20	Cub Foods, CVS, KFC/Taco Bell
15 Emory Commons 2095 N Decatur Rd	Neighborhood	2.41	72,990	0%	0	1990	13	Publix, Blockbuster
16 Memorial Bend 5203 Memorial Dr	Community	2.58	182,748	1%	1,440	1960	58	Publix, TJ Maxx Dollar Tree, Foot Locker
17 Stonemont Village 5203-5291 Memorial Dr	Community	2.83	120,000	17%	4,800	1978 1974	32	Taco Bell, Domino's Family Dollar Orbit Video, Save-A-Lot

Source: Marketek, Inc. January 2004

Decatur), within which there is a total of 4.8 million square feet of retail space. The average vacancy rate is estimated at 13% with 633,046 square feet currently available. Dorey reports a total of 43,200 square feet of retail space under construction in the *East Atlanta* submarket.

To gain insight into the supply and quality of retail businesses in the immediate vicinity of the study area as well as average rents and occupancy rates, Marketek conducted a survey of 17 shopping centers within a five-minute drive of the study area, which are summarized in Exhibit R-1 on the previous page. Most of the centers surveyed are older (i.e., built more than 25 years ago) with an average age of 30 years. Almost one-half of the centers surveyed (eight centers) are located on Memorial Drive. Lease rates range from as low as \$2 per square foot/(NNN)¹ to \$18 per square foot (NNN). Together, the centers are made up of almost 2.5 million square feet of gross leasable space. Among the centers for which rents were available, average rents range from \$10.07-\$12.81; median rents range from \$10.50-\$12.00.

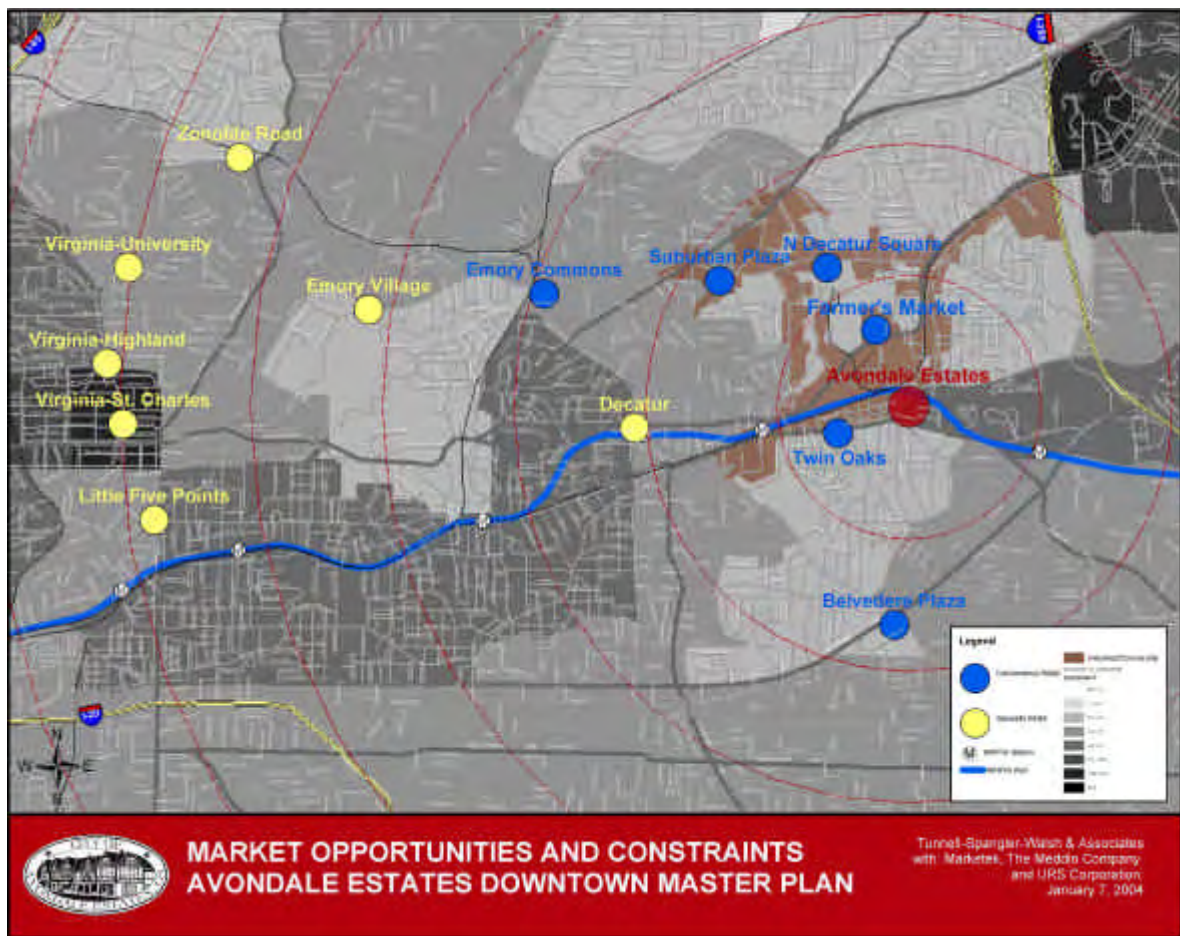
The average vacancy rate of the centers surveyed is 11%, with the highest vacancies at Avondale Shopping Center (33%), Avondale Square (39%) and Service Merchandise Plaza (53%). Recently announced plans to close Circuit City at Service Merchandise Plaza will further weaken the center, increasing its existing 80,000 square feet of vacant space. While this is just one of 18 Circuit City Superstores to close, it is the only Superstore to close in Georgia.

North DeKalb Mall is the largest retail center surveyed (almost 630,000 square feet), located approximately two miles from the study area on Lawrenceville Highway. Built in 1965, North DeKalb Mall is designed as a traditional enclosed mall with SteinMart, Rich's-Macys, Burlington Coat Factory and an AMC theater as anchors. In the fall of 2003 the mall was sold to Hendon Properties, which plans to invest millions of dollars in transforming the mall into an open-air, mixed-use development. Preliminary plans include attracting big-box retailers to the site, developing townhouses and adding an additional 50,000 square feet of retail space. Motivations for buying the site are reportedly closely tied to North DeKalb Mall's proximity to I-285 and the purchasing power of nearby affluent residents of Decatur. In addition to North DeKalb Mall, there two other enclosed malls within a five- to ten-minute drive of the study area: Northlake Mall and South DeKalb Mall.

Neighborhood Business Districts (NBDs) represent an alternative, and increasingly popular, retail format. Within the greater retail market area, there are several successful NBDs including nearby downtown Decatur, East Atlanta, Emory Village, Little Five Points and Virginia-Highland. Each of these shopping districts has a variety of specialty shopping and entertainment options. A map on the following page shows the location of nearby NBDs as well as selected nearby competitive shopping centers.

Retail uses in the study area are primarily concentrated on College Avenue, west of Clarendon Avenue, and are comprised of a mix of free standing businesses, one shopping center (Twin Oaks) and Avondale Estates' landmark

¹ "NNN" denotes triple net lease rate that includes rent plus the tenants pro rata share of all costs for maintenance, repair, utilities, taxes and insurance of common areas.



Tudor Village. Free-stranding retail space on College Avenue is primarily a mix of retail service businesses (especially fast food and casual restaurants and auto-related establishments) that are generally unrelated in terms of business type and design.

Twin Oaks is a 30,000 square foot community center built in 1949 and has an 8% vacancy rate. Major tenants include Salvation Army, Our Way Café and Enterprise Leasing. Average rents are \$12 per square foot (NNN).

While Tudor Village acts as the historic core of Avondale Estates' retail district, existing businesses generate little foot traffic and much of the space is being occupied by office/professional businesses (e.g., chiropractor) or by visibly marginal retail establishments. Several of the spaces in Tudor Village are vacant, including a former cinema. Retail space in Tudor Village reportedly leases for \$12 per square foot (comparable to Twin Oaks).

The strength of the existing core retail area is partially diminished by office space. As mentioned, there are several office service uses in Tudor Village. At 2711 College Avenue, a two-story (4,000 square feet) office structure is vacant with reported lease rates of \$5.40 per square foot. A larger office development is located immediately off of College Avenue on Lake Street.

There are several office/industrial uses to the north of College Avenue, including a 36,000 square foot office/industrial development on Franklin Avenue that is 100% occupied with lease rates that range from \$4.00 to \$6.49 per square foot.

Assuming that retail uses remain centered on or just off of College Avenue west of Clarendon Road, existing vacancies (particularly in Tudor Village), underutilized space (e.g., street level office uses) and infill/redevelopment opportunities could accommodate new retail uses.

RESIDENTIAL PROFILE

To shed light on the existing supply of housing in and around the study area, the supply-side of the rental and for-sale housing market is reviewed and analyzed including: total residential sales in 2003, characteristics and absorption histories of a sample of nearby active for-sale developments that are higher density (i.e. townhouses and cluster homes) and a survey of selected nearby rental apartment projects. While few of the existing for-sale or rental communities are truly comparable to higher density, mixed-use development that would be appropriate for the study area, the supply-side analysis provides insight into the strength of the overall housing market.

Residential Market Trends

National Market

2003 was a stellar year for the nation's single-family market as new home sales exceeded the million-unit mark for the first time at approximately 1.5 million units. Improved job growth, a rise in incomes, growth in new household formations (partially fueled by immigration) and moderate interest rates should help to maintain a strong single-family market in 2004. Low interest rates have had a direct impact on homeownership rates, as renters are finding that mortgage payments are increasingly comparable to rents – especially in the entry-level market.

Nationwide, home prices increased 6.5% during the first three quarters of 2003, with projected price appreciation in 5%-6% range in 2004. As a family's home is typically its single largest investment, a healthy increase in home value will help boost personal wealth. No-growth and slow growth ordinances in communities throughout the nation are contributing to increasing home prices by limiting supply.

Based in interviews with builders and architects, the National Association of Home Builders has identified the following trends in new housing construction:

- The average size of new homes is expected to remain stable at 2,320 square feet.
- Median lot size will continue to decrease as the supply of buildable land decreases causing prices to increase.
- More communities will be built around recreation/entertainment facilities.

The apartment market is positioned for a mild recovery in 2004. While rising employment and interest rates should strengthen the rental market, an over supply of units due to high completions in recent years will subdue the

recovery. In 2004, completions fell by only 5% despite increasing vacancy rates. Effective rents increased by 0.2% by year-end as concessions began to taper off. Job losses over the past few years forced many young professionals to move back home with their parents. As employment improves, this market will likely push apartment demand upward as they move out of their parent's home.

Marcus & Millichap anticipate vacancy rates will drop 50 basis points to 6.5% in 2004. Asking rent is expected to increase by 1.5% and effective rent will drop as increasing demand reduces concessions. Completions are expected to slow in 2004 but will move up again in 2005.

Atlanta Region

Job losses, economic uncertainty and low mortgage rates have also impacted the Atlanta region's housing market. Within the for-sale market, sales of entry-level homes (priced below \$250,000) have remained strong. Higher priced homes (especially those priced above \$400,000) are staying on the market longer as the market continues to show weakness at this price point. Uncertainty over job security and the economy is deterring move-up buyers and even encouraging some homeowners to move-down. Homebuyers can still secure reasonably priced homes in the region's ever-expanding suburbs, while intown and "close-in" neighborhood prices are within reach of a narrowing few. Recent sign of job growth in the Atlanta region will undoubtedly help the housing market, particularly the \$400,000-plus market.

Atlanta's condominium market has proven to be a viable for-sale product in recent years. After booming in the late 1970s and early 1980s, the condominium market in Atlanta faltered from the mid-1980s through the mid-1990s, due to variety of factors including: an oversupply of units; tax law changes; the recession of the early 1990s; the Atlanta market's early reluctance to give up suburban garden apartments and single-family detached subdivisions and embrace higher density urban living; community opposition to higher density housing types; and lenders who were less likely to finance condominium development due to prior losses. In the late 1990s, the continuing intown housing boom combined with successful condo conversion as well as loft housing development rejuvenated the Atlanta condo market.

Other factors underlying the resurgence of the condominium market in Atlanta since the late 1990s include:

- A demographic shift derived from the growth in the aging baby boomer and early retiree markets. Members of these groups are seeking active lifestyles in smaller, maintenance free, secure housing;
- As housing prices rise, condominiums are relatively more affordable than single-family detached housing. This is especially appealing to young professional/first time homebuyers who want to build equity and enjoy the tax benefits of home ownership;
- A national shift in demand favoring intown or close-in housing;
- As interest rates fall, renters realize that rents are exceeding potential mortgage payments.

Atlanta's condominium market is proving to be resilient in the intown markets south of Buckhead and close-in neighborhoods that surround downtown. Less expensive than the luxury condo market in Buckhead and more vibrant than suburban markets such as Vinings, the intown and close-in condo market continues to appeal to young professionals and empty nesters looking for an urban experience close to jobs, entertainment, cultural activities and shopping. Outside of Midtown, historic buildings in other intown and close-in communities such as Castleberry Hill, Old Fourth Ward, Grant Park, Inman Park and downtown Decatur offer condo/loft buyers a unique product often at more reasonable prices. The Brushworks in the Martin Luther King, Jr. Historic District is one example. Located in a 1907 building that once housed a commercial laundry business, the Brushworks offers 20 units ranging in size from 750-2,200 square feet priced between \$139,000 and \$282,500. Unique architectural details (high ceilings, exposed brick and oversized industrial windows), reasonable prices and association fees and an intown location are factors that have led to the success of such developments.

The region's rental market has been hard hit by job losses and low interest rates but is beginning to show signs of recovery. After years of aggressive construction activity, developers are responding to the flat rents and ample concessions by scaling back on construction activity. The 2003 average vacancy rate in the Atlanta MSA was estimated at 11.5% by Marcus & Millichap, up from 10.3% in 2002 and 7.6% in 2001. Year-end effective rents are estimated at \$790, down from \$798 in 2002. Concessions at Class A properties averaged \$133 per unit, \$129 per unit at Class B properties and \$86 per unit at Class C properties. Anticipated job gains in the MSA combined, hopefully, with continued restraint on the part of developers will help the rental market regain its footing in 2004. Developers are showing the greatest interest in close-in submarkets, including the Decatur/Avondale submarket.

Local Housing Characteristics

In an effort to enhance the housing profile of the residential market area (i.e., the 10-mile radius area), selected housing data for the residential market area, Avondale Estates and DeKalb County are provided as follows:

- Occupied housing units in the residential market area are almost evenly divided between ownership and rental: an estimated 52% are owner occupied and 48% are renter occupied (Exhibit H-1). In DeKalb County,

Exhibit H-1

ESTIMATED HOUSING UNITS BY TENURE
City of Avondale Estates, DeKalb County and Residential Market Area
2003

Tenure	Avondale Estates	DeKalb County	Residential Market Area
Occupied			
Owner	87%	54%	47%
Renter	7%	38%	43%
Vacant	6%	9%	11%
Total	1,299	283,375	414,836

Sources: ESRI BIS; 2000 Census

the proportion of owner occupied units is slightly higher (59%). Owner occupied units make up 59% of the DeKalb County's occupied housing units. Almost all occupied units in Avondale Estates (92%) are owner occupied. Eleven percent (11%) of total housing units in the market area are vacant, above the proportion in DeKalb County (9%) and Avondale Estates (6%).

- Home values in Avondale Estates are firmly centered in the \$200,000's, while there is more variation in values throughout the residential market area and in DeKalb County. The estimated median value of specified owner occupied units in the market area was \$163,037 in 2003 (Exhibit H-2), compared to \$157,979 in the DeKalb County and \$236,957 in Avondale Estates. Within the market area, an estimated 44% of homes are valued between \$100,000 and \$199,999: 27% from \$100,000-\$149,999 and 17% from \$150,000 and \$199,999. An estimated 18% of owner occupied homes are valued between \$200,000 and \$299,999, below 20% in DeKalb County and 44% in Avondale Estates. Despite a higher proportion of \$100,000-\$200,000 homes, the market area has a higher share of homes priced at \$500,000 and up relative to DeKalb County and Avondale Estates (7% compared to 2%-3%).

Exhibit H-2

HOME VALUE OF SPECIFIED OWNER UNITS
City of Avondale Estates, DeKalb County and Residential Market Area
2003

Home Value	Avondale Estates	DeKalb County	Residential Market Area
Less than \$50,000	0%	1%	2%
\$50,000-\$99,999	2%	16%	16%
\$100,000-\$149,999	15%	30%	27%
\$150,000-\$199,999	15%	17%	17%
\$200,000-\$299,999	44%	20%	18%
\$300,000-\$399,999	17%	8%	8%
\$400,000-\$499,999	5%	4%	5%
\$500,000-\$749,999	1%	2%	4%
\$750,000-\$999,999	0%	1%	2%
\$1,000,000 and Above	1%	0%	1%
Total	1,132	151,011	192,897
Median Home Value	\$236,957	\$157,979	\$163,037

Source: ESRI BIS

- Exhibit H-3 shows that residential development in Avondale Estates is lower density relative to the county and residential market area. Eighty-nine percent (89%) of housing units in Avondale Estates were single-family attached and detached in 2000, above 56% in the market area and 64% in DeKalb County. Low-density multifamily units (i.e., two to four units) accounted for 8% of occupied units in 2000, slightly below 10% in the market area and 9% in DeKalb County. Only 3% of occupied units in Avondale Estates were medium to high density (i.e., 5 units or above) in 2000, far below 32% in the market area and 26% in DeKalb County.

Exhibit H-3

OCCUPIED HOUSING UNITS BY UNITS IN STRUCTURE
City of Avondale Estates, DeKalb County and Residential Market Area
2000

Unit Type	Avondale Estates	DeKalb County	Residential Market Area
1 Unit Detached	79%	59%	51%
1 Unit Attached	10%	5%	5%
2 Units	1%	2%	3%
3 or 4 Units	7%	7%	7%
5-9 Units	3%	10%	10%
10-19 Units	0%	8%	9%
20-49 Units	0%	3%	4%
50+ Units	0%	5%	9%
Mobile Home	0%	0%	0%
Boat, RV, Van, etc.	0%	0%	0%
Total	1,198	249,339	356,771

Source: 2000 Census

- One- and two-person households predominate in the residential market area and in Avondale Estates, where 62% and 72% of households, respectively, were one- to two-person in size in 2000. In DeKalb County, household size is more evenly dispersed among one- to four-person households.

Exhibit H-4

HOUSING UNITS BY YEAR BUILT
City of Avondale Estates, DeKalb County and Residential Market Area
2000

Year Built	Avondale Estates	DeKalb County	Residential Market Area
Built 1999 to March 2000	0%	3%	2%
Built 1995 to 1998	0%	7%	6%
Built 1990 to 1994	2%	9%	8%
Built 1980 to 1989	16%	21%	18%
Built 1970 to 1979	5%	21%	18%
Earlier than 1969	77%	40%	47%
Total	1,235	261,231	382,002
Median Year Built	1956	1975	1972

Source: 2000 Census

- According to the 2000 Census, housing development in Avondale Estates generally occurred prior to the 1990s as only 2% of occupied units were built during the past decade. Exhibit H-4 shows that in the residential market area and county, residential growth has been more constant over the past three decades. Not surprising, a significant share of residential units in Avondale Estates (77%) were built prior to 1969. The median year residential units were built in the three geographic areas range from 1959 in Avondale Estates to 1975 in DeKalb County.

- Exhibit H-5 shows contract rent paid by renters in Avondale Estates, DeKalb County and the residential market area in 2000. Contract rent is the amount of rent agreed to or contracted for, regardless of additional services, furnishings and utilities. Exhibit H-5 shows that contract rent is generally lowest in Avondale Estates, centered in the \$400- \$700 range compared to the \$500-\$800 range in the county and market area. The median contract rent among renter households was \$516 in Avondale Estates compared to \$671 and \$646 in the county and market area, respectively.

Exhibit H-5

Contract Rent

City of Avondale Estates, DeKalb County and Residential Market Area
2000

Rent	Avondale Estates	DeKalb County	Residential Market Area
With Cash Rent			
Less than \$100	4%	2%	3%
\$100-\$199	11%	2%	5%
\$200-\$299	5%	2%	4%
\$300-\$399	8%	3%	6%
\$400-\$499	17%	7%	8%
\$500-\$599	11%	17%	15%
\$600-\$699	17%	23%	19%
\$700-\$799	10%	19%	16%
\$800-\$899	6%	10%	9%
\$900-\$999	1%	5%	5%
\$1,000-\$1,499	5%	8%	8%
\$1,500-\$1,999	0%	1%	1%
\$2000 or More	0%	0%	1%
No Cash Rent	4%	2%	2%
Median Rent	\$516	\$671	\$646
Average Rent	\$524	\$687	\$652

Source: ESRI BIS

Local For-Sale Housing Market

The Avondale Estates residential market is generally characterized as an historic, single-family community with homes priced in the high \$200,000s with strong sales activity. The average home sale price in 2003 was \$291,353; the average median price was \$278,900 (Exhibit H-6). Thirty-eight percent (38%) of home sales in 2003 were within the \$250,000-\$299,999 range which, on average, stayed on the market for two months (61 days). Homes priced between \$200,000 and \$249,999 also accounted of high share of total sales: 20% with an average of 95 days on the market. While homes priced in the \$300,000s made up 24% of total sales, only 6% of home sales were priced at \$400,000 and up. On average, homes stayed on the market for just over two months (74 days) indicating a strong market.

The Atlanta Journal/Constitution's *Annual Home Report* shows that sales of new and existing housing units within the 30002 zip code decreased by 3%

Exhibit H-6

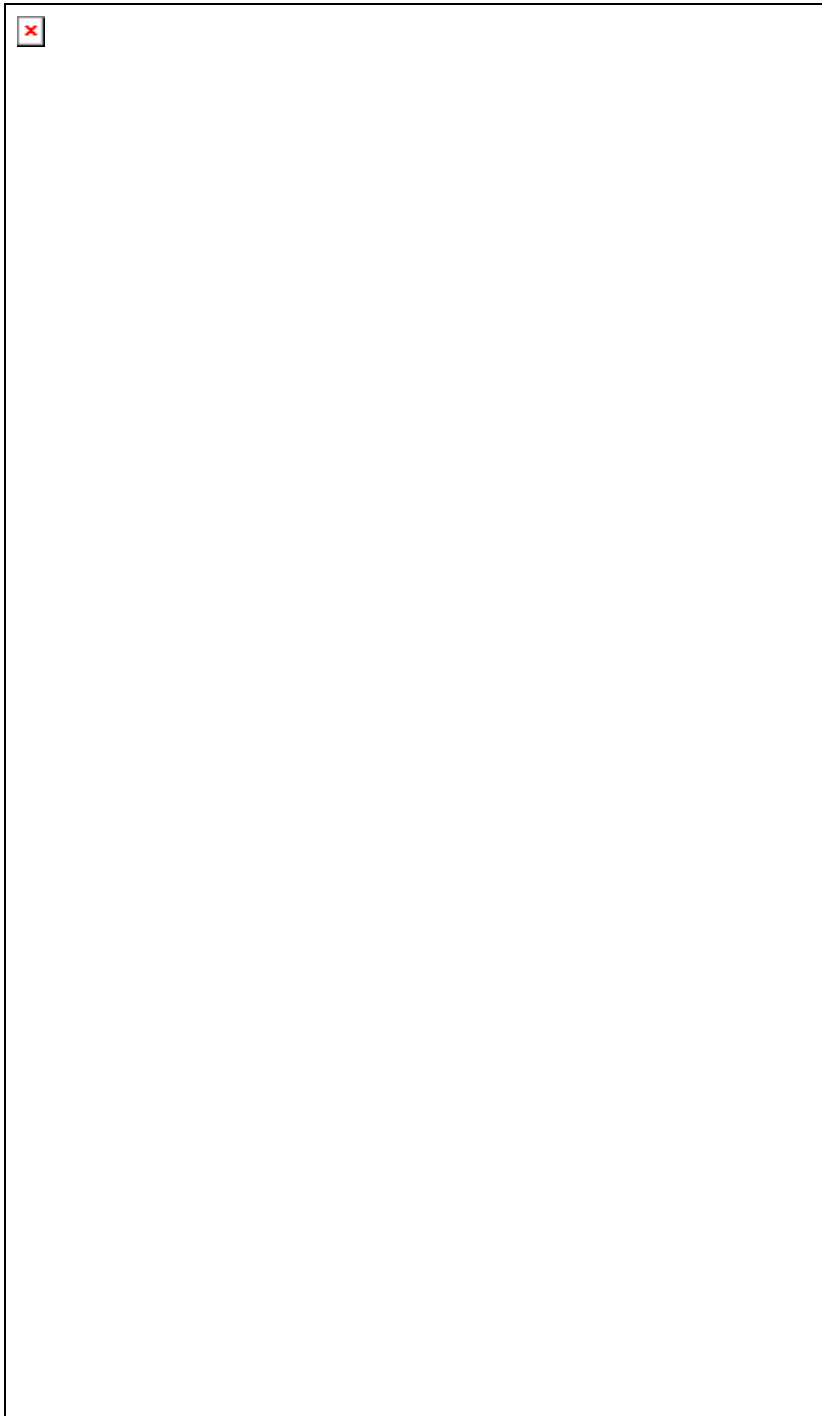
SINGLE FAMILY SALES
Avondale Estates
2003

Sale Price Range	Avondale Estates Home Sales		
	Listings		Avg Days on Market
	Number	Percent	
Less than \$100,000	0	0.0%	NA
\$100,000-\$149,999	1	2.0%	9
\$150,000-\$199,999	5	10.0%	92
\$200,000-\$249,999	10	20.0%	95
\$250,000-\$299,999	19	38.0%	61
\$300,000-\$349,999	5	10.0%	88
\$350,000-\$399,999	7	14.0%	72
\$400,000-\$449,999	1	2.0%	55
\$450,000-\$499,999	0	0.0%	NA
\$500,000-\$549,999	1	2.0%	39
\$550,000-\$599,999	1	2.0%	91
\$600,000 and Higher	0	0.0%	NA
Average Sales Price	\$291,353		
Median Sales Price	\$278,900		
Average List/Sale Price	97%		
Median List/Sale Price	98%		
Average Days on Market	74		
Median Days on Market	54		
Average Bedrooms/Bath	3/2		

Source: Multiple Listing Service

from 2001-2002 compared to a 3% increase in DeKalb County. However, the median sales price of new and existing units in the 30002 zip code increased by 9% to \$212,000 during this period while the median price dropped 1% countywide to \$154,000.

Exhibit H-7 on the following page shows active listings of small lot, detached units (i.e., cluster homes) located in DeKalb County inside the perimeter, north of I-20. List prices range from \$240,000 to \$575,000 with an average list price of \$356,786 and a median list price of \$345,000. The listings are generally 0.25-acres or less in size with approximately 10 to 12 feet between units. Unit size averages 1,900 to 2,200 square feet with more expensive units as large as 2,800-3,000 square feet. Three- to four-bedroom units predominate, most with two to three bathrooms and some with half-baths. The homes listed typically have a small yard in the front – none in back – and garages under the unit accessed from the back.



A survey of selected higher density residential projects in and nearby Avondale Estates shows that absorptions of this type of product varies considerably (2 to 14 units per month). Not surprising, absorption of units priced from the mid \$100,000s to low \$200,000s is highest. Two of the projects (Locust Lofts and Locust Lofts on Washington Street) are located in the study area. The homes surveyed are located in Avondale Estates, Scottdale and downtown Decatur.

Kensington Walk

3290 Kensington Road

- Total units: 14
- Two and three bedrooms
- Sales began in 2001
- Average sales per month: 0.5
- One unit remaining, priced at \$259,900
- Townhomes

Locust Lofts

Locust Street

- Total units: 8
- Sold before project was finished two years ago
- Resales: \$139,800 for a 802 square foot unit (\$174 per square)
\$170,000 for a 1,038 square foot unit (\$164 per square)
- Adaptive reuse two-story lofts.

Locust Lofts on Washington St.

- Total units: 6
- Resales: \$170,000, for a 1,400 square foot unit assuming second story is built out (\$121 per square)
- New sales: \$170,000
- All but one has sold; one resale.
- New construction.

Brookside Parc

Rockbridge Road inside I-285

- Total units: 30
- Townhomes centered on a community park
- Two and three bedroom units
- 1,600-2,000 square feet
- Mid \$150,000s to Mid \$170,000s
- \$80 monthly association fee
- Sales began in October 2003 and 14 units have sold (an average of 3.5 units/month)

Lantern Ridge

Off of North Decatur Road, Scottdale

- Total Units: 253 (189 townhomes and 64 single-family detached)
- Townhomes are \$140,000-\$190,000 and are 1,600-1,900 square feet.
- Single-family detached units are priced in the mid \$200,000 and are 2,200-2,500 square feet.
- One, two, three and four bedroom units.
Construction started in 2001 and sold out in less than eighteen months (an average of 14 per month).

The Clairemont

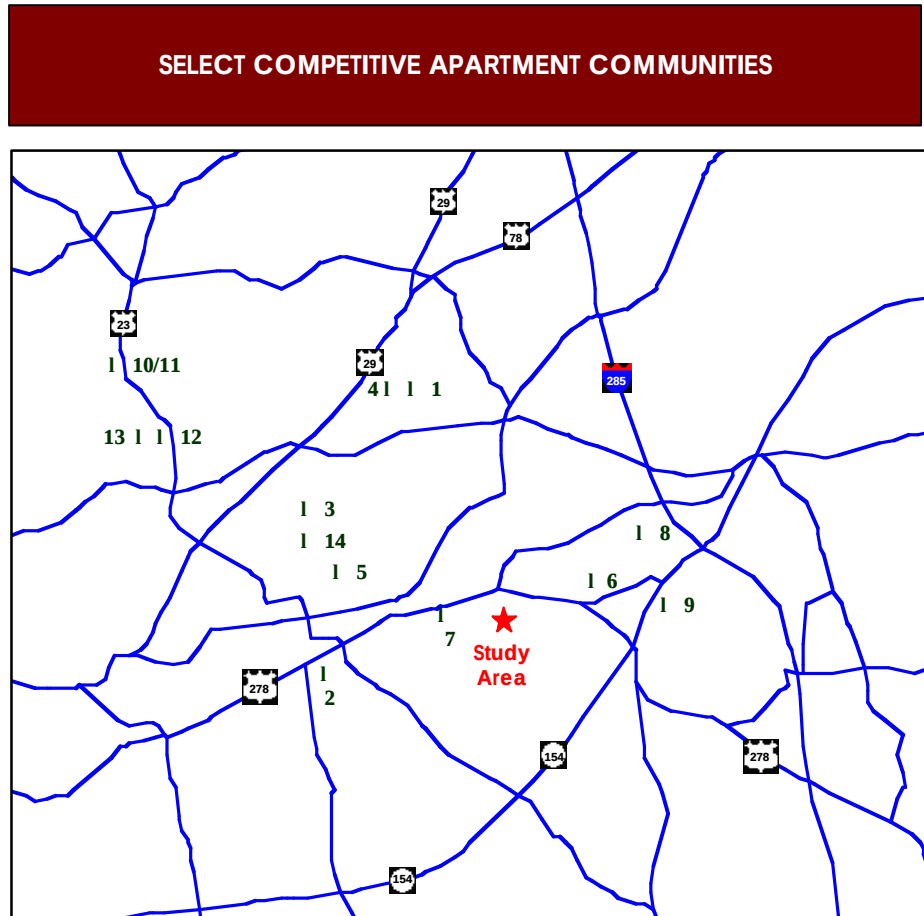
Clairemont Road, Decatur

- Total Units: 66
- Two and three bedroom units range from 1,650-2,200 square feet.
- Priced from \$350,000 to the high \$400,000s.

- Sales started in 2002 with 13 remaining (2.2 units per month)
- Condominium flats.

Rental Housing Market

To obtain an understanding of rents, unit sizes, occupancies, community/unit amenities of rental apartment projects in the Avondale Estates area, Marketek conducted a survey of 14 nearby apartment projects in January 2004 which is presented in Exhibit H-8 on the following page and analyzed in this section. Below is a map showing the locations of the projects surveyed.



The 14 projects surveyed include a total of 4,303 units. The average (weighted) occupancy rate of the projects surveyed is 86%, with only two of the projects experiencing occupancy rates of 95% or higher. The overall occupancy rate is skewed by one of the projects surveyed (Kensington Estates) that is only 74% occupied and accounts for approximately one quarter of total units. The overall occupancy rate increases to 90% when excluding this one project. An occupancy rate of 95% or higher indicates that demand and supply in the rental apartment market are close to equilibrium. A portion or all of the units at three of the projects surveyed are reserved for households who qualify for the Low Income Housing Tax Credit (LIHTC) Program.

Exhibit H-8

SUMMARY CHARACTERISTICS OF SELECTED APARTMENT COMMUNITIES

[illegible]

Site	Units/ Mix	Rent		Square Feet		Rent/ Sq. Ft.	Deposit	Structure Type	Occ Rate	Year Built	Amenities											Comments
		Low	High	Low	High						A	B	CL	C	FC	L	P	PL	T	WD	WDC	
9 Kensington Station	Efficiencies	1,122				NA	\$250	3-story flats	74%	1967	X	X	X		X	X	X		X			Rent specials. Recently renovated with new amenities but still below market standard.
	One Bedroom	NA	\$475	\$575	600	800	\$0.75															
	Two Bedroom	NA	\$545	\$580	1,100	1,100	\$0.51															
	Three Bedroom	0					NA															
10 Highland Lake Phase1	Efficiencies	190				NA	\$150 (Special)	4-story flats	91%	1998	X	X	X	X	X	X	X				X	
	One Bedroom	80	\$769	\$869	795	915	\$0.96															
	Two Bedroom	110	\$1,069	\$1,099	1,204	1,327	\$0.86															
	Three Bedroom	0					NA															
11 Highland Lake Phase 2	Efficiencies	196				NA	\$150 (Special)	4-story flats	91%	2000	X	X	X	X	X	X	X				X	
	One Bedroom	70	\$769	\$869	795	915	\$0.96															
	Two Bedroom	70	\$1,069	\$1,099	1,204	1,327	\$0.86															
	Three Bedroom	56	\$1,199	\$1,199	1,513	1,513	\$0.79															
12 Carlyle Lake	Efficiencies	252				NA	\$150 (Special)	3-story flats	91%	1990		X	X	X	X		X			X		High number of students.
	One Bedroom	112	\$727	\$769	670	1,000	\$0.90															
	Two Bedroom	140	\$749	\$927	1,145	1,200	\$0.71															
	Three Bedroom	0					NA															
13 Gables Montclair	Efficiencies	182				NA	\$450	3-story flats and TH (70% TH)	90%	2001	X			X	X	X	X				X	Well maintained. Some units have garages. All of the TH are 3-Bedroom.
	One Bedroom	65	\$850	\$1,100	769	1,069	\$1.06															
	Two Bedroom	72	\$1,375	\$1,450	1,438	2,263	\$0.76															
	Three Bedroom	45	\$2,025	\$2,350	2,572	2,811	\$0.81															
14 Clarion Apts.	Efficiencies	217				NA	\$300	3- & 4-story flats	95%	1993	X	X	X	X	X	X	X		X		X	
	One Bedroom	112	\$716	\$829	742	850	\$0.97															
	Two Bedroom	77	\$931	\$1,020	1,072	1,140	\$0.88															
	Three Bedroom	28	\$1,139	\$1,182	1,373		\$1.69															
TOTAL	Efficiencies	4,303					\$150-\$450	~	86%	1981												
	One Bedroom	56	\$402		505	\$0.80																
	Two Bedroom	1,191	\$738		788	\$0.94																
	Three Bedroom	1,451	\$843		1,087	\$0.78																
TOTAL	Efficiencies	237	\$1,132		1,324	\$0.86																
	One Bedroom	56	\$402		505	\$0.80																
	Two Bedroom	1,191	\$738		788	\$0.94																
	Three Bedroom	1,451	\$843		1,087	\$0.78																

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

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

Source: Marketek, Inc., January 2004

The apartment communities surveyed are generally older. The average age of all projects surveyed is 23 years. When excluding Kensington Station from total units, however, the average drops to 18 years. Four of the communities surveyed were built since 2000.

Among the apartment communities surveyed for which the unit mixes were available, two bedroom units are the dominant unit type, accounting for 49% of units with an average monthly rent of \$843 and an average of 1,087 square feet in size. One bedroom units are a close second (41%), with an average monthly rent of \$738 and an average of 788 square feet in size. Three bedroom units account for 8% of units in projects surveyed for which mixes were available, with rents averaging \$1,132 and unit sizes of 1,324 square feet. Only one of the projects surveyed offers efficiency units (rents of \$402 and 505 square feet in size). Value ratios for efficiencies, one, two and three bedroom units are \$0.80, \$0.94, \$0.78 and \$0.86 per month, respectively.

One of the communities surveyed, Avondale Station, is a 212-unit development located at the western edge of the study area on College Avenue and Twin Oaks Drive. Built in 1947, Avondale Station is well maintained but offers few amenities. Monthly rents range from \$690 to \$850 for one and two bedroom units. Another apartment community within the study area that was not included in the survey due to its size (only 12 units) is Ashton Woods, comprised of three brick, four-unit structures that were built in the 1950s. One and two bedroom units rent from \$700-\$800 and all but one of the units is occupied. While Ashton Woods does not offer any community amenities, all of the units have hard wood floors. The owner of the property reports that tenants are generally young professionals.

Unit features and project amenities present in the communities surveyed generally include full kitchen with dishwasher, balcony or patio, cable-ready, pool and on-site laundry and or/washer/dryer connection. Upgrade features and amenities include: washer/dryer in unit, tennis, pool, clubhouse/fitness center, garage and, at one community, a cyber café.

Renter profiles obtained from interviews with managers and on-site leasing agents confirm that while there is a mix of prospective tenants at the communities surveyed, tenants are typically young professionals and students.

While all of the projects surveyed are single use, garden style communities, the potential for higher density, mixed use residential development can be found just a few miles away in downtown Decatur. Built in 1926 by the Atlantic Star Ice and Coal Company, the Ice House Lofts is an adaptive reuse project located a few blocks from the courthouse square in downtown Decatur. The 98-unit development completed in 1999 has studio, one and two bedroom units that rent from \$775-\$2,000 per month. Units range from 625-1,240 square feet in size and are 90% occupied. A café occupies approximately 4,800 square feet of first story space. A fitness center, pool and a secured garage are just some of the community amenities.

In addition to the Ice House Lofts, two rental projects are in the planning or development stage in downtown Decatur. The Decatur Renaissance

Apartment is under construction and is scheduled to be complete in November 2004. The development will have 168 market rate units one (55%) and two bedroom units (45%) with 5,500 square feet of space reserved for retail uses. Anticipated rents will average \$1.45 per square foot. Also planned in downtown Decatur is a 292-unit condominium and rental development that is currently in the planning stages but is expected to break ground in July 2004. This project will have 143 condominium units and 149 rental units (almost one-half income restricted) as well as 21,500 square feet of commercial space.

RETAIL MARKET ANALYSIS

Establishing the study area's position as a commercial center for retail market area residents, area employees and visitors is a central part of the downtown Avondale Estate's revitalization program. This section provides estimates of potential market demand for retail uses in the local and greater market areas (defined in this section as the "local and greater market areas") as well as the study area's capture of this demand. The local and greater market areas designated for this research (delineated in the Demographic Profile) are based on drive time estimates from the study area.

Retail Sales Potential and Supportable Space

The methodology for estimating statistical market support for retail space in the local and greater market areas is displayed in Exhibits RD-2 through RD-6. This methodology applies expenditure potential¹ by type of merchandise to market area population figures in order to obtain potential sales volume for market area residents. Potential sales are divided among six merchandise and service categories: *shoppers goods, convenience goods, food & beverages, automotive products, personal services* and *other retail expenditures*. Exhibit RD-1 specifies the types of goods and services within several of these categories. For instance, "apparel" includes women's apparel, men's apparel, children's apparel, footwear, watches and jewelry.

Exhibit RD-1

SUMMARY OF MERCHANDISE AND SERVICE CATEGORIES

Merchandise/Service Category	Types of Goods/Services
Apparel	Women's Apparel, Men's Apparel, Children's, Footwear, Watches & Jewelry
Home Furnishings	Furniture, Floor Coverings, Major and Small Appliances, Household Textiles, Floor Coverings, PC Software and Hardware, Housewares, Dinnerware, Telephones
Home Improvement	Maintenance and Remodeling Materials, Lawn & Garden
Misc. Specialty Retail	Pet Care, Books & Periodicals, Sporting Equipment, Toys & Hobbies, Video Cassettes & Games, TV/VCR/Cameras, Audio Equipment, Luggage, Eyeglasses
Groceries	Food at Home, Nonalcoholic Beverages at Home, Alcoholic Beverages, Smoking Products
Restaurants	Food Away From Home, Alcoholic Beverages
Entertainment	Admission to Movie/Theater/Opera/Ballet, Recreational Lessons, Participation in Clubs
Personal Services	Shoe Repair, Video Rental, Laundry & Dry Cleaning, Alterations, Clothing Rental & Storage, Watch & Jewelry Repair, Photo Processing & Supplies, Child Care

Source: ESRI BIS

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

Estimates of sales per square foot of store space derived from the Urban Land Institute's *Dollars and Cents of Shopping Centers* are used to convert adjusted potential sales to supportable space estimates. In Exhibit RD-2, for example, in the case of apparel, potential sales of \$90,151,530 in the local market area at sales per square foot of \$209 will support 431,347 square feet devoted to this type of merchandise. Potential sales of \$415,712,512 in the greater market area will support 1,989,055 square feet of apparel space.

Exhibit RD-2 shows that in 2003, there was the potential for approximately 2.4 million square feet of retail space based on potential expenditures of residents who reside in the local market area. In the greater market area there was the potential for 11.1 million square feet of retail space based on resident expenditure potential. That is, greater market area residents have the potential to generate sales demand that will support 11.1 million square feet of retail space, 2.4 million square feet of which is located in the local market area. However, these potential expenditures by residents may occur outside of the local or greater market areas—including the Internet – if desirable goods and services are not available.

Exhibit RD-2

RETAIL EXPENDITURE POTENTIAL
Local and Greater Retail Market Areas
2003

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/Sq. Ft.)	Potential Supportable Space(Sq. Ft.)	
	Local Area	Greater Area	Local Area	Greater Area		Local Area	Greater Area
Apparel	\$2,843	\$3,104	\$90,151,530	\$415,712,512	\$209	431,347	1,989,055
Home Furnishings	\$1,402	\$1,532	\$44,457,420	\$205,177,696	\$199	212,715	1,031,044
Home Improvement	\$571	\$628	\$18,106,410	\$84,106,784	\$140	129,332	600,763
Misc. Specialty Retail	\$1,951	\$2,126	\$61,866,210	\$284,730,928	\$216	286,418	1,318,199
Shoppers Goods			\$214,581,570	\$989,727,920		1,059,811	4,939,060
Grocery	\$5,728	\$6,691	\$181,634,880	\$896,112,248	\$390	465,730	2,297,724
Health & Personal Care	\$908	\$987	\$28,792,680	\$132,186,936	\$365	78,884	362,156
Convenience Goods			\$210,427,560	\$1,028,299,184		544,615	2,659,880
Restaurants	\$3,630	\$3,961	\$115,107,300	\$530,488,808	\$263	437,670	2,017,068
Entertainment	\$371	\$409	\$11,764,410	\$54,776,552	\$90	130,716	608,628
Personal Services	\$945	\$1,036	\$29,965,950	\$138,749,408	\$151	198,450	918,870
Total			\$581,846,790	\$2,742,041,872		2,371,262	11,143,506

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

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

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Exhibit RD-3 on the next page displays projected retail expenditure potential for the local and greater market areas for the year 2008. Based on population growth and subsequent increases in retail sales for the years 2003-2008, total supportable retail space in the greater market area will have increased to 11.9 million square feet by the year 2008, 2.5 million square feet of which is generated by local market area residents.

Exhibit RD-3

RETAIL EXPENDITURE POTENTIAL
Local and Greater Retail Market Areas
2008

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/Sq. Ft.)	Potential Supportable Space(Sq. Ft.)	
	Local Area	Greater Area	Local Area	Greater Area		Local Area	Greater Area
Apparel	\$2,843	\$3,104	\$96,457,304	\$442,816,640	\$209	461,518	2,118,740
Home Furnishings	\$1,402	\$1,532	\$47,567,056	\$218,555,120	\$199	239,030	1,098,267
Home Improvement	\$571	\$628	\$19,372,888	\$89,590,480	\$140	138,378	639,932
Misc. Specialty Retail	\$1,951	\$2,126	\$66,193,528	\$303,295,160	\$216	306,452	1,404,144
Shoppers Goods			\$229,590,776	\$1,054,257,400		1,145,378	5,261,083
Grocery	\$5,728	\$6,691	\$194,339,584	\$954,538,060	\$390	498,307	2,447,533
Health & Personal Care	\$908	\$987	\$30,806,624	\$140,805,420	\$365	84,402	385,768
Convenience Goods			\$225,146,208	\$1,095,343,480		582,708	2,833,302
Restaurants	\$3,630	\$3,961	\$123,158,640	\$565,076,260	\$263	468,284	2,148,579
Entertainment	\$371	\$409	\$12,587,288	\$58,347,940	\$90	139,859	648,310
Personal Services	\$945	\$1,036	\$32,061,960	\$147,795,760	\$151	212,331	978,780
Total			\$622,544,872	\$2,920,820,840		2,548,560	11,870,054

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

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

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Exhibit RD-4

RETAIL EXPENDITURE POTENTIAL
Local and Greater Retail Market Areas
2013

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/Sq. Ft.)	Potential Supportable Space(Sq. Ft.)	
	Local Area	Greater Area	Local Area	Greater Area		Local Area	Greater Area
Apparel	\$2,843	\$3,104	\$103,203,743	\$471,686,944	\$209	493,798	2,256,875
Home Furnishings	\$1,402	\$1,532	\$50,894,002	\$232,804,252	\$199	255,749	1,169,871
Home Improvement	\$571	\$628	\$20,727,871	\$95,431,508	\$140	148,056	681,654
Misc. Specialty Retail	\$1,951	\$2,126	\$70,823,251	\$323,069,086	\$216	327,885	1,495,690
Shoppers Goods			\$245,648,867	\$1,122,991,790		1,225,488	5,604,090
Grocery	\$5,728	\$6,691	\$207,932,128	\$1,016,771,051	\$390	533,159	2,607,105
Health & Personal Care	\$908	\$987	\$32,961,308	\$149,985,507	\$365	90,305	410,919
Convenience Goods			\$240,893,436	\$1,166,756,558		623,464	3,018,024
Restaurants	\$3,630	\$3,961	\$131,772,630	\$601,917,521	\$263	501,037	2,288,660
Entertainment	\$371	\$409	\$13,467,671	\$62,152,049	\$90	149,641	690,578
Personal Services	\$945	\$1,036	\$34,304,445	\$157,431,596	\$151	227,182	1,042,593
Total			\$666,087,049	\$3,111,249,514		2,726,812	12,643,946

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

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

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Exhibit RD-4 on the previous page provides the same type of analysis for the year 2013 when supportable space will have increased to approximately 12.6 million square feet in the greater market area; 2.7 million square feet of which is located in the local market area.

Exhibits RD-5 and RD-6 on the following pages distribute increases in sales and supportable retail space in the local and greater market areas among various retail categories for the years 2003, 2008 and 2013. Exhibits RD-5 and RD-6 also provide an estimate of the study area's capture of the increase in potential sales and demand for space for the years 2008 and for 2013.

Based on this analysis, sales by greater market area retailers of selected *shoppers goods* have a potential to reach \$989.7 million in 2003, \$1.05 billion by 2008 and \$1.12 billion by 2013. In 2003, this sales level would support 4.9 million square feet devoted to *shoppers goods*. By 2008, supportable space for *shoppers goods* is projected to reach 5.3 million square feet of space and by 2013, supportable space will potentially have increased to 5.6 million square feet. Estimated retail expenditures by local market area residents will support approximately one-fifth of this space in 2008 and 2013.

Utilizing the assumption that the majority of space devoted to *shoppers goods* will continue to be concentrated in the major shopping centers and commercial strip development located in the local and greater market areas, the study area's projected capture of the potential increase in total local and greater market area demand for *shoppers goods* during the study period 2003-2013 is conservative. The projection shows that the study area has the potential to capture 12% of the increase in total sales generated by local market area residents by 2008 and 5% of the increase in greater market area potential sales. By 2013, Exhibits RD-5 and RD-6 show these capture rates increasing to 14% and 7%, respectively. The study area's capture rates for *shoppers goods* and other retail categories are primarily based on Marketek's experience in similar shopping districts throughout the nation (i.e., the proportion of sales comparable shopping districts have been able to capture), the study area's current retail potential relative to the market area and the study area's competitive advantages once redeveloped.

Based on these capture rates, the study area has the potential of drawing an additional \$3.2 million in *shoppers goods* sales by 2008 and \$4.8 million by 2013 from greater market area residents. These increases in sales translate into 16,101 square feet of supportable retail space by 2008 and an additional 24,010 square feet by 2013. In 2008, 56% of the estimated demand for *shoppers goods* space will result from expenditures by local market area residents, dropping to 47% by 2013 as the study area draws more customers from beyond a five-minute drive. Examples of *shoppers goods* that would appeal to the target markets of nearby employees, market area residents and area students include: books/magazines, home accessories, card/stationery/gifts, electronics, jewelry, shoes and men's and women's.

Exhibit RD-5

POTENTIAL SUPPORTABLE RETAIL SPACE
Local Retail Market Area
2003-2013

Merchandise or Service Category	2003	2008			2013			Total Study Area Capture
	Local Retail Market Area	Local Retail Market Area	Numeric Increase	Study Area Capture	Local Retail Market Area	Numeric Increase	Study Area Capture	
<i>Shoppers Goods</i>								
Apparel				12%			14%	
Potential Sales	\$90,151,530	\$96,457,304	\$6,305,774	\$756,693	\$103,203,743	\$6,746,439	\$944,501	\$1,701,194
Supportable SF	431,347	461,518	30,171	3,621	493,798	32,280	4,519	8,140
Home Furnishings								
Potential Sales	\$44,457,420	\$47,567,056	\$3,109,636	\$373,156	\$50,894,002	\$3,326,946	\$465,772	\$838,929
Supportable SF	212,715	239,030	26,316	1,875	255,749	16,718	2,341	4,216
Home Improvement								
Potential Sales	\$18,106,410	\$19,372,888	\$1,266,478	\$151,977	\$20,727,871	\$1,354,983	\$189,698	\$341,675
Supportable SF	129,332	138,378	9,046	1,086	148,056	9,678	1,355	2,441
Misc. Retail								
Potential Sales	\$61,866,210	\$66,193,528	\$4,327,318	\$519,278	\$70,823,251	\$4,629,723	\$648,161	\$1,167,439
Supportable SF	286,418	306,452	20,034	2,404	327,885	21,434	3,001	5,405
Total								
Potential Sales	\$214,581,570	\$229,590,776	\$15,009,206	\$1,801,105	\$245,648,867	\$16,058,091	\$2,248,133	\$4,049,237
Supportable SF	1,059,811	1,145,378	85,567	8,985	1,225,488	80,110	11,215	20,201
<i>Convenience Goods</i>								
Grocery				30%			35%	
Potential Sales	\$181,634,880	\$194,339,584	\$12,704,704	\$3,811,411	\$207,932,128	\$13,592,544	\$4,757,390	\$8,568,802
Supportable SF	465,730	498,307	32,576	9,773	533,159	34,853	12,198	21,971
Health & Personal Care								
Potential Sales	\$28,792,680	\$30,806,624	\$2,013,944	\$604,183	\$32,961,308	\$2,154,684	\$754,139	\$1,358,323
Supportable SF	78,884	84,402	5,518	1,655	90,305	5,903	2,066	3,721
Total								
Potential Sales	\$210,427,560	\$225,146,208	\$14,718,648	\$4,415,594	\$240,893,436	\$15,747,228	\$5,511,530	\$9,927,124
Supportable SF	544,615	582,708	38,094	11,428	623,464	40,756	14,265	25,693
<i>Restaurants</i>								
Potential Sales	\$115,107,300	\$123,158,640	\$8,051,340	\$1,610,268	\$131,772,630	\$8,613,990	\$2,153,498	\$3,763,766
Supportable SF	437,670	468,284	30,613	6,123	501,037	32,753	8,188	14,311
<i>Entertainment</i>								
Potential Sales	\$11,764,410	\$12,587,288	\$822,878	\$164,576	\$13,467,671	\$880,383	\$176,077	\$340,652
Supportable SF	130,716	139,859	9,143	1,829	149,641	9,782	1,956	3,785
<i>Personal Services</i>								
Potential Sales	\$29,965,950	\$32,061,960	\$2,096,010	\$628,803	\$34,304,445	\$2,242,485	\$784,870	\$1,413,673
Supportable SF	198,450	212,331	13,881	4,164	227,182	14,851	5,198	9,362
Total								
Potential Sales	\$581,846,790	\$622,544,872	\$40,698,082	\$8,620,346	\$666,087,049	\$43,542,177	\$10,874,106	\$19,494,452
Supportable SF	2,371,262	2,548,560	177,298	32,529	2,726,812	178,252	40,822	73,351

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

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Exhibit RD-6

POTENTIAL SUPPORTABLE RETAIL SPACE
Greater Retail Market Area
2003-2013

Merchandise or Service Category	2003	2008			2013			Total Study Area Capture
	Greater Retail Market Area	Greater Retail Market Area	Numeric Increase	Study Area Capture	Greater Retail Market Area	Numeric Increase	Study Area Capture	
<i>Shoppers Goods</i>								
Apparel				5%			7%	
Potential Sales	\$415,712,512	\$442,816,640	\$27,104,128	\$1,355,206	\$471,686,944	\$28,870,304	\$2,020,921	\$3,376,128
Supportable SF	1,989,055	2,118,740	129,685	6,484	2,256,875	138,135	9,669	16,154
Home Furnishings								
Potential Sales	\$205,177,696	\$218,555,120	\$13,377,424	\$668,871	\$232,804,252	\$14,249,132	\$997,439	\$1,666,310
Supportable SF	1,031,044	1,098,267	67,223	3,361	1,169,871	71,604	5,012	8,373
Home Improvement								
Potential Sales	\$84,106,784	\$89,590,480	\$5,483,696	\$274,185	\$95,431,508	\$5,841,028	\$408,872	\$683,057
Supportable SF	600,763	639,932	39,169	1,958	681,654	41,722	2,921	4,879
Misc. Retail								
Potential Sales	\$284,730,928	\$303,295,160	\$18,564,232	\$928,212	\$323,069,086	\$19,773,926	\$1,384,175	\$2,312,386
Supportable SF	1,318,199	1,404,144	85,946	4,297	1,495,690	91,546	6,408	10,705
Total								
Potential Sales	\$989,727,920	\$1,054,257,400	\$64,529,480	\$3,226,474	\$1,122,991,790	\$68,734,390	\$4,811,407	\$8,037,881
Supportable SF	4,939,060	5,261,083	322,023	16,101	5,604,090	343,007	24,010	40,112
<i>Convenience Goods</i>								
Grocery				13%			15%	
Potential Sales	\$896,112,248	\$954,538,060	\$58,425,812	\$7,595,356	\$1,016,771,051	\$62,232,991	\$9,334,949	\$16,930,304
Supportable SF	2,297,724	2,447,533	149,810	19,475	2,607,105	159,572	23,936	43,411
Health & Personal Care								
Potential Sales	\$132,186,936	\$140,805,420	\$8,618,484	\$1,120,403	\$149,985,507	\$9,180,087	\$1,377,013	\$2,497,416
Supportable SF	362,156	385,768	23,612	3,070	410,919	25,151	3,773	6,842
Total								
Potential Sales	\$1,028,299,184	\$1,095,343,480	\$67,044,296	\$8,715,758	\$1,166,756,558	\$71,413,078	\$10,711,962	\$19,427,720
Supportable SF	2,659,880	2,833,302	173,422	22,545	3,018,024	184,723	27,708	50,253
<i>Restaurants</i>								
Potential Sales	\$530,488,808	\$565,076,260	\$34,587,452	\$2,766,996	\$601,917,521	\$36,841,261	\$4,052,539	\$6,819,535
Supportable SF	2,017,068	2,148,579	131,511	10,521	2,288,660	140,081	15,409	25,930
<i>Entertainment</i>								
Potential Sales	\$54,776,552	\$58,347,940	\$3,571,388	\$357,139	\$62,152,049	\$3,804,109	\$456,493	\$813,632
Supportable SF	608,628	648,310	39,682	3,968	690,578	42,268	5,072	9,040
<i>Personal Services</i>								
Potential Sales	\$138,749,408	\$147,795,760	\$9,046,352	\$1,176,026	\$157,431,596	\$9,635,836	\$1,445,375	\$2,621,401
Supportable SF	918,870	978,780	59,910	7,788	1,042,593	63,813	9,572	17,360
Total								
Potential Sales	\$2,742,041,872	\$2,920,820,840	\$178,778,968	\$16,242,393	\$3,111,249,514	\$190,428,674	\$21,477,776	\$37,720,169
Supportable SF	11,143,506	11,870,054	726,548	60,923	12,643,946	773,892	81,772	142,695

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

© 2004 by Marketek, Inc.

The primary target market for *convenience goods* in the study area will be nearby residents (i.e., local market area residents) as consumers are typically unwilling to travel far from home for most convenience goods and services. Local market area households make up more than one-third (36%) of greater market area households. Accordingly, Exhibit RD-5 shows that the study area should be able to capture 30% of the local market area's potential increase in convenience store sales by 2008, increasing to 35% by 2013. When adding in potential demand generated by the households within a five- to ten-minute drive of the study area (i.e., greater market area households beyond the local market area) the study area can potentially capture additional sales of \$8.7 million or approximately 22,545 square feet of new convenience store space by 2008 and an additional \$10.7 million or 27,708 square feet by 2013. This level of potential demand could accommodate a market/prepared food or small-scale grocery store.

Primary target markets for *restaurants* are market area residents, people who work at nearby businesses and area students. The study area should be able to capture at least 8% of the increase in the sales of *food & beverages* in the greater market area by 2008, resulting in additional demand of approximately 10,521 square feet of such space in the study area. Exhibit RD-5 shows that local market area residents would support 58% of this potential demand.

By the year 2013, the study area should be able to expand its offering of *restaurants* that will result in an increase of \$4.1 million in sales or demand for 15,409 square feet of additional space. This sales level represents 11% of the increase in total greater market area potential demand for *restaurants* from 2008 to 2013 (53% generated by local market area residents). This is based upon the assumption that by the year 2013, the study area should have established itself as an expanded mixed-use commercial center with a wide variety of specialty shopping, entertainment, new housing and office uses.

The study area has the potential to capture 10% of the greater market area's *entertainment* sales in 2008 and 12% in 2013, translating into sales of \$357,139 in 2008 and \$456,493 in 2013. The increase in potential *entertainment* sales will support an additional 3,968 square feet of space in 2008 and another 5,072 square feet in 2013. In 2008, an estimated 46% of this space is supported by local market area residents, narrowing to 39% in 2013 as the study area's reputation as an entertainment destination is expanded.

The increase in *personal services* sales for the greater market area is projected at \$9.0 million by the year 2008, increasing by an additional \$9.6 million by the year 2013. Similar to *convenience goods*, the primary market for *personal services* will be local market area residents. A 13% capture of increased sales for the greater market area would justify an increase of 7,788 square feet of space devoted to *personal services* by the year 2008. Based on a 15% capture by the year 2013, support for personal services space in the study area will have increased by another 9,572 square feet.

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

Exhibit RD-7 summarizes the level of new potential supportable retail space in the study area in 2008 and 2013, derived from local and greater market area residents. The estimate for potential retail space in the study area should be considered conservative based on the fact that expenditures of a key target market – employees of nearby businesses who do not live in the market area – are not factored into estimates. As discussed in the Demographic Profile, more than 42,000 potential customers of study area businesses work within a two-mile radius of the study area. In addition to nearby workers, commuters along Covington Road/Avondale Road/East College Avenue and/or Memorial Drive may look to Avondale Estates for a portion of their shopping needs (e.g., take-home food, drycleaner/tailor) if quality businesses were present. Also excluded from demand estimates are students at nearby colleges and universities who live outside of the local or greater market area or are not classified as primary residents of either the local or greater market area.² Finally, new housing developed in the study area will further boost

Exhibit RD-7

SUMMARY OF NEW POTENTIAL SUPPORTABLE RETAIL SPACE IN THE STUDY AREA
2008-2013

Merchandise/ Service Category	Study Area New Supportable Retail Space		Study Area New Supportable Retail Space		Total Study Area New Supportable Retail Space	
	(Square Feet)		(Square Feet)		(Square Feet)	
	Local Area 2008	Greater Area 2008	Local Area 2013	Greater Area 2013	Local Area	Greater Area
Shoppers Goods						
Apparel	3,621	6,484	4,519	9,669	8,140	16,154
Home Furnishings	1,875	3,361	2,341	5,012	4,216	8,373
Home Improvement	1,086	1,958	1,355	2,921	2,441	4,879
Misc. Specialty Retail	2,404	4,297	3,001	6,408	5,405	10,705
Subtotal	8,985	16,101	11,215	24,010	20,201	40,112
Convenience Goods						
Grocery	9,773	19,475	12,198	23,936	21,971	43,411
Health & Personal Care	1,655	3,070	2,066	3,773	3,721	6,842
Subtotal	11,428	22,545	14,265	27,708	25,693	50,253
Restaurants	6,123	10,521	8,188	15,409	14,311	25,930
Entertainment	1,829	3,968	1,956	5,072	3,785	9,040
Personal Services	4,164	7,788	5,198	9,572	9,362	17,360
Total	32,529	60,923	40,822	81,772	73,351	142,695

Source: Marketek, Inc.

© 2004 by Marketek, Inc.

² Students that list their parents' home as their primary residence are not included in the demographic, Lifestyle or retail expenditure data.

potential demand for retail space. Clearly, estimates provided in Exhibit RD-7 are conservative as expenditures by several key groups fall outside of the model.

It is our opinion that with aggressive marketing and various types of incentives, new retail businesses that choose to locate in the study area will be willing to pay lease rates comparable to those paid by tenants in more successful shopping centers and neighborhood business districts throughout the local and greater market areas.

Retail Spending Activity

The Spending Potential Index (SPI) is a measure of market activity developed by ESRI Business Information Solutions and denotes actual dollars *spent* on certain goods and services. When the SPI is equal to 100 for a specific type of merchandise, consumers are buying or spending at a rate equal to the national average. A SPI greater than 100 indicates that consumers are buying or spending above the national average. In other words, the SPI is an indicator of what prices consumers will pay and/or the level of their discretionary income they are willing to devote to a particular good or service. Exhibit RD-8 on the following page shows the SPI of local and greater market area households for various types of goods and services.

Overall, the data presented in Exhibit RD-8 shows that local and greater market area residents spend at a rate above the national average on several types of goods and services, particularly households within the greater market area. Spending is consistently high among various types of apparel (SPI=113/123)³, with women's apparel (SPI=114/124), men's apparel (SPI=108/119), footwear (SPI=117/127), and watches & jewelry (SPI=121/131) receiving the highest expenditures. Specialty goods and services for which spending is above average include: toys & games (SPI=113/124), housewares (SPI=132/144) and sports/exercise equipment (SPI=103/112). Local and greater market area residents also show above spending for personal care products (SPI=113/123) and nonprescription drugs (SPI=108/117).

Spending on all categories within the food & beverages category is high, which includes food consumed at home and at restaurants. Spending on groceries (SPI=112/122) is just slightly below spending on meals at restaurants (SPI=113/123). Spending for alcoholic beverages (both at home and at restaurants) is significantly above average (SPI=119/129).

It is important to note that while spending is below average for several of the types of goods and services listed in Exhibit RD-8, local and greater retail market area consumers may still demand these goods and services – on the whole they just tend to pay less for them.

³ In instances where two figures for SPI are provided, the first number represents the SPI of local retail market households and the second represents greater retail market households.

Exhibit RD-8

SPENDING POTENTIAL INDEX OF SELECTED GOODS AND SERVICES
Local and Greater Retail Market Areas

Merchandise/ Service Category	Spending Potential Index		Merchandise/ Service Category	Spending Potential Index	
	Local Area	Greater Area		Local Area	Greater Area
Apparel	113	123	Financial Services		
Men's	108	119	Investments	105	118
Women's	114	124	Auto Loans	87	94
Children's	105	115	Health		
Footwear	117	127	Nonprescription Drugs	108	117
Watches & Jewelry	121	131	Prescription Drugs	81	88
Other Apparel	115	126	Eyeglasses and Contact Lenses	86	94
Computer			Home		
Computer/Hardware for Home	91	100	Home Improvement		
Software/Accessories for Home	90	98	Maintenance/Remodeling Serv	84	92
Entertainment & Recreation	92	101	Maintenance/Remodeling Supp	77	85
Entertainment Fees & Admissions	92	101	Household Furnishings		
Membership Fees	90	99	Household Textiles	89	98
Sports Participation	91	100	Furniture	92	101
Theater/Movies/Ballet/Opera	95	104	Floor Coverings	85	94
Sporting Events	91	100	Major Appliances	87	95
Recreational Lessons	90	100	Housewares	132	144
Television & Sound Equipment	91	99	Small Appliances	87	95
Cable Television	89	97	Luggage	94	103
Color Television	92	101	Telephone & Accessories	116	126
VCR/Video Camera/DVD Player	93	101	Child Care	95	104
Video Cassettes and DVDs	93	100	Lawn & Garden	89	98
Video Game Hardware/Software	93	101	Moving/Storage	98	105
Satellite Dishes	83	90	Housekeeping Supplies	110	120
Video/DVD Rental	95	103	Insurance		
Audio Equipment	94	102	Homeowners/Renters	81	89
Rental & Repair of TV/Sound	95	102	Vehicle	89	97
Pets & Supplies	97	106	Life	84	93
Toys & Games	113	124	Health	83	90
Recreational Vehicles & Fees	76	83	Personal Care Products	113	123
Sports/Exercise Equipment & Supplies	103	112	School Books & Supplies	93	100
Photo Equipment & Supplies	92	101	Smoking Products	89	97
Books/Magazines/Subscriptions	89	97	Transportation		
Food & Beverages	112	122	Vehicle Purchases	86	94
Groceries	112	122	Gas & Oil	87	94
Bakery & Cereal Products	112	122	Vehicle Maintenance & Repair	91	98
Meats, Poultry, Fish & Eggs	112	122	Travel		
Dairy Products	110	120	Air Fare	91	100
Fruits & Vegetables	113	123	Hotels/Motels	87	96
Other Foods at Home	111	121	Rental Cars	92	101
Meals at Restaurants	113	123	Food/Drink	88	97
Alcoholic Beverages	119	129			
Nonalcoholic Beverages at Home	111	120			

Source: ESRI BIS

Exhibit RD-9

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

Merchandise or Service Category	Primary Lifestyle Groups			
	Enterprising Young Singles	Urban Professional Couples	Urban Working Families	High Rise Renters
Apparel				
Purchased women's apparel	104	104	90	98
Purchased men's apparel	102	104	86	103
Purchased adult dress shoes	119	101	98	131
Purchased adult casual shoes	116	106	89	124
Purchased adult athletic shoes	104	98	100	96
Purchased children's apparel: 1-5 yrs	87	89	125	162
Purchased children's apparel: 6-12 yrs	73	84	94	55
Purchased fine jewelry	110	114	71	108
Purchased costume jewelry	98	110	72	110
Purchased watch	115	94	120	80
Restaurants				
Eat at family restaurants 6+ /month	112	97	76	94
Eat at family restaurants 2-5/month	100	105	82	78
Eat at family restaurants <2/month	97	83	135	91
Take out: pizza	103	111	83	98
Take out: Mexican	114	108	69	145
Take out: Chicken	94	92	133	105
Take out: Chinese	117	126	136	144
Take out: Deli	106	129	107	133
Enjoy foreign food	117	112	71	132
Electronics				
Purchased Separate Components	110	98	114	103
Purchased Compact/Console Stereo	116	97	147	101
Own 4+ televisions	69	98	136	57
Own 2+ VCRs	92	101	116	83
Own camcorder	84	100	64	70
Rent 31+ video cassettes	126	97	77	112
Purchase PC/Software/Peripherals	114	123	47	139
Gardening				
Indoor gardening/plants	98	129	78	117
Outdoor flower gardening	85	114	67	74
Outdoor vegetable gardening	63	108	60	54
Books				
Purchased paperback book	112	120	62	132
Purchased hardcover book	122	125	59	150
Purchased travel book	116	182	90	81
Purchased children's book	85	105	68	101
Purchased cook book	123	114	68	141
Baby Products				
Purchased infant toys	95	102	85	88
Purchased infant clothing	93	97	103	73
Purchased infant sleepwear	93	94	120	56
Pets				
Own dog	67	99	67	63
Own cat	87	87	55	41
Use dog/cat treats	88	107	54	57
PC Usage				
Own PC at home	111	122	49	134
Use PC at home 10+ hrs/wk	110	126	46	144
Use/subscribe to Internet	144	143	57	182
Hobbies/Interests				
Cooking	114	119	102	127
Bars/nightclubs	147	119	82	170
Dancing	138	94	104	157
Needlework	90	108	46	74
Listening to music	117	112	96	121
Photography	103	102	108	139
Household Furnishings				
Purchased household furniture	105	104	93	84
Purchased tableware/dinnerware	109	101	114	121
Purchased bedding/bath/linens	103	103	92	97
Home Improvements				
Made home improvements	73	109	74	74
Did home remodeling	56	99	86	59

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

Source: ESRI BIS

Retail Purchasing Activity by Lifestyle Group

While SPI is a measure of spending activity, the Purchase Potential Index (PPI) measures consumer's tendency to *buy* certain goods and services. PPI indicates that there is higher (PPI>100) or lower (PPI<100) than average demand for a product or service. Exhibit RD-9 on the previous page displays the PPI for various types of merchandise among the primary lifestyle groups within the local and greater market areas. The data displayed in Exhibit RD-9 should be used to gauge the types of businesses that would appeal to certain markets in the market area – e.g., young, upwardly mobile *Enterprising Young Singles* and *High Rise Renters* versus older, more established *Urban Professional Couples*. While the propensity to buy certain types of goods varies among the primary lifestyle groups, in many instances there is high demand for merchandise among multiple lifestyle groups.

Exhibit RD-9 shows that with the exception of *Urban Working Families* (a less affluent and more family oriented Lifestyle group), expenditures of primary lifestyle groups within the local and greater market areas are typical of urban, active professionals. Retail goods most in demand include shoes, fine jewelry, books, tableware/dinnerware and a variety of electronics. Primary Lifestyle groups enjoy dining out, especially at foreign restaurants and take-out Mexican, Chinese and deli food. Indicative of active lifestyles, popular interests or activities include cooking, dancing, going to bars/nightclubs, photography and listening to music.

The data presented in Exhibit RD-9 should not be used solely to identify businesses that will be “all things to all markets.” Attracting niche businesses that serve specific target markets will be the key to a successful business recruitment and retention program in the study area.

Target Markets for Retail Development

To optimize chances for redeveloping the study area as a vibrant mixed-use district, the future business mix should cater to the needs and preferences of its primary target markets. Primary target markets for retail development are local and greater market area residents, employees that work at nearby businesses and students at neighboring colleges and universities. The following summarizes the characteristics and preferences of each.

- **Market Area Residents**

The demographic characteristics of market area residents are presented in the Demographic Profile. In 2003, 346,796 people lived within a ten-minute drive of the study area, 24% of whom (or 81,692) lived within a five-minute drive. The age distribution of local and greater market area residents is younger than the Atlanta MSA, with a median age of 33.0 and 33.2 years, respectively, compared to 34.2 years. While median incomes of local and greater market area households are below the MSA median income, there are pockets of affluence in and nearby the study area. For example, the 2003 estimated median household income in Avondale Estates was \$73,566, compared to \$51,567 in the MSA. Although the racial distribution of the City of Avondale Estates reveals a population that is

almost entirely white, approximately 60% of local and greater market area residents are African-American or black.

The Demographic Profile also expands the analysis of resident demand with detailed Lifestyle profiles of local and greater market area residents. *Enterprising Young Singles* and *High Rise Renters* account for roughly one-third of local and greater market area households. Typically young, active and mobile, *Enterprising Young Singles* and *High Rise Renters* are key target markets for new housing and retail development in the study area. Although their incomes are only slightly above the national average, their long-term financial prospects are favorable due to the fact that they are well educated and have good jobs usually in professional, managerial, technical, sales and administrative positions. *Enterprising Young Singles* and *High Rise Renters* most likely rent (at a rate more than twice the national average) and live alone or have a roommate. Representative of their youth, leisure time is centered on fitness, dining out, going to bars, dancing, listening to music, shopping and travel. The Internet is a routine vehicle for information, shopping and communication. *High Rise Renters* generally have more affluent tastes than *Enterprising Young Single*, but both Lifestyle groups frequently buy apparel, electronics, books and PCs/software.

Urban Professional Couples are another primary Lifestyle group in the local and greater market areas with characteristics that make it a strong target market for residential and retail development in the study area. Older than *Enterprising Young Singles* and *High Rise Renters*, *Urban Professional Couples* have higher incomes and few, if any, children. They likely own their home (often townhomes), lead active lifestyles and have upscale tastes including classical music, imported wine and foreign travel.

One issue that repeatedly surfaced in the survey research conducted for this study is the fact that Avondale Estates is perceived as an “enclave” in terms of the socioeconomic characteristics of its residents relative to the surrounding area. On the whole, residents of Avondale Estates are older, more affluent and less racially diverse than local and greater market area residents. As new study area retail businesses will more than likely require customers beyond the community, it is important to consider the characteristics of residents throughout the market area – many of whom may have overlapping tastes and preferences.

- *Employees*

Employees who work within the immediate vicinity of the study area are a captive market in the sense that they are in the area for at least eight hours a day, five days a week and, consequently, would be likely to shop, run errands and eat out in the study area if the appropriate businesses were present. More than 42,000 people are within a short drive or walk (i.e., within a two-mile radius) from the study area five days a week, representing a significant market for new retail development.

Also a valuable target market are commuters who rely on Covington Road/Avondale Road/East College Avenue, and possibly the portion of Memorial Drive close to the study area, to get to and from work. Based on 2002 traffic count data from the Georgia Department of Transportation, 21,738 vehicles drive through the intersection of Clarendon Avenue and Avondale Road each day. These commuters could prove to be a valuable target market for study area businesses.

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

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

- *Area Students*

Once dismissed as a “beer-drinking and broke” market, college students today are spending more than ever before with an estimated annual buying power of \$200 billion. A 2002 study conducted by Harris Interactive found that college students spend an average of \$287 per month on discretionary items, much of which is spent on food and beverages, personal care products and music/CDs. The study also found that in terms of activities outside of the classroom, students frequently surf the Internet, read (magazine, books and newspapers), exercise, watch videos/DVDs, listen to music and interact with friends.

Almost 13,000 college students are within a short drive of the study area. Approximately 11,600 students are enrolled at Emory, which is located less than a ten-minute drive from the study area. Although smaller, Agnes Scott is within walking distance of the study area and maintains a student body of approximately 945, roughly 90% of whom live on campus. Young, adventurous consumers such as these students have essentially “jump started” shopping districts throughout the nation, largely due to their willingness to shop and/or live in

“undiscovered” areas.

Based on survey findings reported by *American Demographics*, college students most frequently demand the following types of goods and services:

- Books
- Tapes/CDs
- Computers/software
- Gifts/cards
- Apparel
- Sporting goods
- Groceries
- Cosmetics
- Restaurants (deli, bagels, ice-cream/gelato/yogurt, health foods, coffee, pizza, fast food, ethnic foods and bars/grille/pubs)
- Dry cleaning/laundry
- Barber/salon
- Bicycle repair
- Video rental
- Film processing

Resident Shopping Behavior and Needs

A portion of the Character Preference Survey conducted for the Master Plan addressed current shopping habits and needs of survey participants. One hundred and sixty-one (161) people participated in the survey, 91% of whom live in Avondale Estates. Although most new and existing study area businesses will need to draw customers from beyond Avondale Estates, community resident's patronage will be important – especially in the initial phases of redevelopment. Summary findings of the survey follow:

- While there is a limited selection of businesses in the study area, almost one-half of survey respondents conduct business there on a consistent basis (i.e., once or more per week). Restaurants, City Hall, the Post Office and “other services” are the strongest draws.
- Respondents most frequently travel to the Kroger at North Decatur Road and Clairmont for their grocery shopping. Non-grocery shopping is generally not location specific.
- Although respondents dine out in various locations, not surprisingly, downtown Decatur is a popular destination,
- Selection and convenience are strong factors in selecting a place to shop.
- The types of specialty retail that survey respondents would most like to see locate in the study area include women's and men's apparel, shoes, books, gifts/cards, music/CDs, antiques, decorating accessories, garden supplies/hardware and art galleries.
- A grocery store and a pharmacy are highly desirable types of convenience businesses among survey respondents. The types of personal services that survey respondents would most like to see locate in the study area include: video/DVD rental, banking/financial planning, dry cleaning, tailors/alterations and hair/beauty.

- Survey respondents consider restaurants a highly desirable use in the study area, specifically a deli, ethnic cuisine, coffee house, a bakery, fine dining, family restaurants and a bar/grille/pub. Other desired nighttime activities include live theater, concerts/live music and a movie theater.
- Business that survey respondents feel are most inappropriate for the study area are fast food establishments, auto related businesses, and nightclubs.

Recommended Retail Uses

Over the next ten years, Marketek estimates that that the study area will potentially be able to support 142,352 square feet of new retail space. Based on demographic and Lifestyle characteristics of local and greater retail market residents, retail spending and purchasing activity of retail market area households, community input, consideration of target markets, the supply and quality of existing retail establishments in the retail market and study area, physical constraints of the study area and retail trends, the types of specialty retail goods that would be best suited for the study area include:

- Women's Apparel
- Men's Apparel
- Shoes
- Sporting goods
- Jewelry
- Home furnishings and accessories
- Unique garden supplies
- Architectural antiques suited for nearby historic homes
- Bookstore/magazines
- Music/CDs
- Gift/cards
- Toy store with unique products attractive to children and adults

The types of convenience goods and services that would appeal to residents (particularly those living within and immediately surrounding the study area) include:

- Small, urban grocery store or specialty market with a selection of take-home meals
- Drugstore
- Wine/liquor store
- Video rental
- Exercise studio/gym/yoga
- Film processing
- Drycleaner/alterations
- Salon/day spa
- Shoe repair
- Banking
- Mail/copy center

Recruiting restaurants and entertainment related businesses to the study area should be a near-term priority in business recruitment. These types of

businesses appeal to multiple target markets (e.g., community and market area residents, nearby workers and students) and, unlike specialty merchandise, do not rely as heavily on a critical mass of related businesses. Restaurants in nearby East Atlanta, Virginia Highland and downtown Decatur laid the foundation for what later evolved into vibrant business districts. One-of-a-kind restaurants that give target markets a reason to travel to the study area should be recruited, for example: deli/soup/sandwich shop, breakfast spot, bar/grille/pub, family restaurant/diner, barbeque, ethnic (e.g., Mediterranean, Thai/Chinese/Vietnamese, authentic Mexican/Tex-Mex.), desserts/coffee, English tearoom, ice cream/gelato.

Activities that offer area residents and visitors something to do at night and on the weekend will help the study area establish itself as a destination. Activities that attract younger, active market area residents (e.g., *Enterprising Young Singles*, *High Rise Renters*, students, etc.) such as bars/pubs, concerts, theater, art openings will also draw in older markets. Furthermore, a variety of entertainment options will be a major asset in marketing new housing developed in the study area. It is important, however, that entertainment businesses and activities not undermine Avondale Estates' small town charm.

The former cinema represents an opportunity for entertainment and community activities. Currently a "white elephant," the cinema could be redeveloped for multiple uses to increase its likelihood of success. For instance, nighttime activities could include live theater, concerts, dance and art films/film festivals; children's puppet shows, art classes, theater lessons, magic shows could provide weekend afternoon activities; artists could display their work throughout the lobby; and the community or nearby businesses could use the theater for meetings and seminars during the daytime or evenings. There are several approaches to financing and managing the cinema. For instance, a non-profit could be created to acquire, own, renovate and manage the theater, relying on private donations, grants and event revenue; a private developer could be solely responsible for acquisition, renovation and operation; or a non-profit could acquire and renovate the cinema and afterwards convey it to the city to manage.

Small downtowns throughout the nation are increasingly learning that the arts can play a major role their revitalization by not only building upon the community's cultural base and identity but also drawing a variety of related businesses. One of the greatest advantages in promoting arts related activities and businesses is that it can be done incrementally with a combination of public and private investment. For example, one major success story – e.g., the restoration of the former cinema or the development of an outdoor amphitheater – could lead to nearby galleries, restaurants and/or live music. Experience has shown that businesses and activities such as art galleries, theater productions, street performances and art studios have the potential of drawing related businesses such as restaurants, cafes/coffee shops, nightclubs, print/frame stores, specialty retail with evening hours and "creative" businesses such as interior design and web development. Utilizing industrial space for artist

studios is another opportunity to attract “pioneers” or new residents to the study area.

Retail Development Guidelines

The single most important competitive advantage of retail development throughout the study area will be its ability to provide customers with a variety of shopping and entertainment options that are not only convenient but unlike what they can find elsewhere in the area. These principles are rooted in the success of nearby neighborhood businesses districts (e.g., downtown Decatur and Virginia Highland) as experiences are increasingly a driving force behind where consumers shop, eat and do business. As new entertainment, shopping, housing and office uses are developed in the study area, it is imperative to the future success of this development that it adhere to several guiding principles to reinforce and enhance its distinct identity. These principles are reflected in the following guidelines:

- **Work to promote business clustering.** A critical component of retail development is the creation of a unified district with complementary businesses that benefit from each other’s sales, customers and markets. The primary vehicle for developing unified groups of stores and businesses is clustering – creating mutual advantages in terms of pedestrian flow and shared markets between businesses. Successful clustering is dependent upon having the appropriate mix of businesses that will create market synergies and an uninterrupted grouping of businesses that draw customers to and through the entire district. A direct result of successful clustering is that it creates a critical mass of businesses that encourages customer traffic. When compatible or complementary businesses are clustered together, the likelihood increases that customers will go to more than one business and spend more money by making multiple purchases. “One purchase leads to another” is a time-tested, fundamental principle of consumer behavior. Educating business owners, property owners and real estate professionals about the importance of using this business development tool is critical.
 - **Concentrate Redevelopment Activity.** Dispersing redevelopment activity ultimately dilutes its impact. As the focal point of the study area, Tudor Village and its adjacent parcels are the most suitable choice for initial retail development. Only once this core area is stabilized should additional development branch out into the remainder of the study area.
 - **Minimize the Use of the Automobile.** Creating a safe, pleasant and convenient atmosphere for pedestrians should be a priority redevelopment initiative. Although customers will more often than not use their cars to reach the study area, using design and land use planning to encourage pedestrian activity within and between the study area and the adjacent community will enliven the overall area, reduce traffic and invoke a sense of community.
-

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- **Focus on Attracting Unique Businesses and Activities.** Offering unique goods and services is the best way to draw multiple target markets – area employees, residents and students – to the study area. One-of-a-kind mom-and-pop restaurants (e.g., sidewalk cafes, dessert shops, diner, ethnic cuisine, etc.) or shops that focus on customer service and, perhaps, have ties to the community will be the easiest to attract to the study area and will contribute to its sense of place (i.e., “place making” businesses). Smaller, unique stores should be the focus of business recruitment efforts as opposed to national retailers.
 - **Use Land Resources Efficiently.** Work to reuse existing sites and encourage infill development with a mix of residential, commercial, cultural and office uses. Redeveloping existing sites (e.g., auto related businesses, underutilized industrial space, strip development, office uses, etc.) better utilizes underutilized, obsolete and/or vacant space, lowers infrastructure costs and enables developers to fully redevelop an area.
 - **Minimize Community Impact.** Community residents have expressed a concern that redevelopment activity in the study area will result in increased traffic, parking shortages and noise from restaurants and nighttime activities. While a certain level of community impact will be unavoidable as new development occurs, limiting redevelopment to the study area will help reduce negative impacts on the community.
 - **Incorporate Elements of Avondale Estate’s Existing Scale and Style.** Avondale Estate’s small town feel will rely greatly on maintaining its current architectural scale and style. Honoring the historic character of the community through consistent design – including limited references to its Tudor architecture – will elevate the community’s comfort level with new development and provide shoppers with modern day goods and services in a small town setting.
-

RESIDENTIAL MARKET ANALYSIS

The residential market analysis is focused on the for-sale and rental residential markets in the study area. The residential market area (delineated in the Demographic Profile) is comprised of a 10-mile radius from the study area and is considered to be the area from which a majority of potential study area residents will be drawn. Using demographic data presented in the Demographic Profile (e.g., population growth, household income data) and 2000 Census data, estimates of potential demand for the for-sale and rental sectors for the 2003-2013 period are provided. Estimated potential demand for for-sale and rental housing is calibrated with Lifestyle data to help determine the proportion of households in the market area that are realistic target markets for residential development in the study area.

Potential Demand for For-Sale and Rental Housing

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

The two main sources of annual potential demand for housing are new household growth and turnover. New household growth⁴ is traditionally used to project market growth and is based on population and household growth projections. The owner and renter analyses use the average annual increase in population beginning with the 2003 estimated household base and the projected 2003-2013 annual increase in new households.

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

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

⁴ New households are those currently living outside of the market area, the majority of which likely reside within the Atlanta MSA.

preferences. For instance, a large family may prefer a house with a big yard in a suburban setting over a loft-style home in a mixed-use setting.

It is assumed that a majority of prospective homebuyers have annual incomes of \$35,000 and higher and live in one to three person households. Based on the estimate that 52% of market area households will own rather than rent and that 67% of new households moving into the market area will own their homes, Exhibit HD-1 estimates that over the next ten years 5,567 households will be potential buyers of higher density, new market rate housing built in the market area each year.

Exhibit HD-1

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

New Household Demand		Turnover	
Annual New Households (1)	6,826	Total Households (1)	370,761
Owner Propensity	67%	Owner Propensity	52%
Number	4,573	Number	192,796
Target Market Adjustment (2)	25%	Turnover Rate (5)	12%
Number	1,143	Number	23,135
Income Qualified (3)	73%	Target Market Adjustment (6)	35%
Number	835	Number	8,097
Household Size Qualified (4)	73%	Income Qualified (7)	67%
Sub-Total	609	Number	5,425
		Household Size Qualified (8)	78%
		Sub-Total	4,232
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			5,567

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

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

Exhibit HD-2

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

New Household Demand		Turnover	
Annual New Households (1)	6,826	Total Households (1)	370,761
Renter Propensity	33%	Renter Propensity	48%
Number	2,253	Number	177,965
Target Market Adjustment(2)	25%	Turnover Rate (5)	45%
Number	563	Number	80,084
Income Qualified (3)	25%	Target Market Adjustment(6)	35%
Number	141	Number	28,030
Household Size Qualified (4)	73%	Income Qualified (7)	27%
Subtotal	103	Number	7,568
		Household Size Qualified (8)	78%
		Sub-Total	5,903
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			6,907

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

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

Exhibit HD-2 presents the potential demand for market rate rental product within the market area. Similar to Exhibit HD-1, households are qualified by Lifestyle group, income and household size. One to three person households with annual incomes between \$25,000 and \$50,000 are represented in Exhibit HD-2. An estimated 6,907 annual households in the market area are potential renters at market rate projects set in a mixed-use setting. The potential demand analysis completed for this study does not include prospective households from outside the market area that would be drawn to the study area as redevelopment progresses.

EXHIBIT HD-3

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

	Potential Demand for New For-Sale Housing Units (1)	Study Area Capture Rate	Total Study Area Capture
Year 1	5,567	2%	111
Year 2	5,567	2%	111
Year 3	5,567	2%	111
Year 4	5,567	2%	111
Year 5	5,567	3%	167
Year 6	5,567	3%	167
Year 7	5,567	3%	167
Year 8	5,567	3%	167
Year 9	5,567	3%	167
Year 10	5,567	3%	167
Total	55,672	3%	1,447

1. As shown in Exhibit HD-1

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

	Potential Demand for New Rental Housing Units (2)	Study Area Capture Rate	Total Study Area Capture
Year 1	6,907	3%	207
Year 2	6,907	3%	207
Year 3	6,907	3%	207
Year 4	6,907	3%	207
Year 5	6,907	3%	207
Year 6	6,907	4%	276
Year 7	6,907	4%	276
Year 8	6,907	4%	276
Year 9	6,907	4%	276
Year 10	6,907	4%	276
Total	69,067	4%	2,417

2. As shown in Exhibit HD-2

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

	Potential Demand for New Rental and For-Sale Housing Units	Percentage of For-Sale Units	Percentage of Rental Units
Year 1	319	35%	65%
Year 2	319	35%	65%
Year 3	319	35%	65%
Year 4	319	35%	65%
Year 5	374	45%	55%
Year 6	443	38%	62%
Year 7	443	38%	62%
Year 8	443	38%	62%
Year 9	443	38%	62%
Year 10	443	38%	62%
Total	3,865	37%	63%

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

Based on an evaluation of the housing market in the Avondale Estates area, planned and proposed physical improvements in the study area, the expansion of the study area's position as a mixed-use center and our experience in facilitating residential development in comparable areas, Marketek estimates that during the first ten years of development, approximately 3,865 units of market rate for-sale and rental housing units could be absorbed in the study area (Exhibit HD-3 on the previous page). Again, this estimate is narrowed by Lifestyle data to include only households that would be most interested in living in a higher density, mixed-use environment.

The projection for the potential demand for housing in the study area assumes that there will exist marketable for-sale and rental housing product and that a marketing program for new housing will be underway. The housing types will be primarily new construction and, possibly, some adaptive reuse

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

- Success of residential development in Atlanta's intown and "close-in" neighborhoods, especially downtown Decatur.
- Strong intown/close-in residential market, fueled by the desire to reduce commuting time.
- Growing desire to live in communities that connect residents to community, culture and a variety of activities.
- Strong absorption rates at nearby for-sale developments.
- A limited amount of newly developed rental product with attractive amenity packages in the area. .
- Avondale Estates' proximity to downtown Atlanta and access to major employment centers via I-285 and MARTA.

Target Markets for Residential Development

Early residents of newly developed housing in the study area are likely to be relatively mobile, well educated, active and somewhat adventuresome. While young professionals and empty nesters remain a primary market segment for downtown or close-in, mixed-use housing development, the demand for this type of housing development is growing. Shorter commutes, lower maintenance and immediate access to a variety of uses are part of the explanation. However, the most significant factor is the growing post 9/11 need of people to feel connected to friends, family and community. This phenomenon, described as "Hiving," supports the type of housing development that is proposed for the study area: development that blends work, community, recreation and living.

Exhibit HD-4 provides a generalized summary of primary target markets for residential development in the study area. Prospective residents will primarily include young people (e.g., *Enterprising Young Singles* and *High Rise Renters*), singles and couples with few or no children (e.g., *Urban Professional Couples*) and empty nesters who are couples or single persons with grown children. Employees working in or close to the study area should be an initial target market for new housing. Empty nesters and

EXHIBIT HD-4

PRIMARY TARGET MARKET CHARACTERISTICS FOR NEWLY DEVELOPED HOUSING IN AVONDALE ESTATES

	For-Sale Product	Rental Product	Live/Work Units For-Sale and Rental
Occupation Age Household Size Income Motivations/Preferences	Entry-Level Professionals 25 to 35 1 to 2 persons, few with children \$35,000-\$50,000 Access to work/downtown/MARTA Location with identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Relatively mobile	Entry-Level Professionals 25 to 35 1 to 2 persons, few with children \$30,000-\$40,000 Access to work/downtown/MARTA Seek vibrant, mixed-use setting Location with identity/sense of place Relatively mobile	Artists/Professionals 25 to 50 1 to 2 persons, few children \$35,000+ Seek urban lifestyle Seek large adaptable spaces Access to suppliers, customers Relatively mobile
Occupation Age Household Size Income Motivations/Preferences	Higher Level Professionals 30 to 50 1 to 2 persons, some with children \$50,000+ Access to work/downtown/MARTA Move-up or move-over buyer Seek vibrant, mixed-use setting Location with identity/sense of place Investment and resale important Relatively mobile	Service, technical, administrative 25 to 50 1 to 2 persons, some with children \$25,000-\$40,000 Access to work/downtown/MARTA Value convenience/security Highly mobile	Creative Advertising, marketing, arts, film & music, software developers, inventors, photographers, designers
Occupation Age Household Size Income Motivations/Preferences	Business Owners/Operators 30 to 60 1 to 2 persons, few with children \$40,000+ Access to work/downtown/MARTA Individualized unit Relatively settled	Higher Level Professionals 30 to 50 1 to 2 persons, few with children \$40,000+ Access to work/downtown/MARTA Location with identity/sense of place Seek vibrant, mixed-use setting Highly mobile	Professionals More traditional fields of accounting/finance, education, law, various types of consulting
Occupation Age Household Size Income Motivations/Preferences	Retirees 55+ 1 to 2 persons \$35,000 or available equity Possibly strong ties to the community Walk to businesses/services/activities Enjoy community/activities Less maintenance, more security Move-over, move-down buyer Highly settled	Retirees 55+ 1 to 2 persons \$30,000+ Possibly strong ties to the community Walk to businesses/services Enjoy community/activities Less maintenance, more security Location with identity/sense of place Relatively settled	
Occupation Age Household Size Income Motivations/Preferences	Entry-Level Professionals 25 to 35 1 to 2 persons, few with children \$35,000-\$50,000 Access to work/downtown/MARTA Location with identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Relatively mobile	Graduate Students 22 to 30 Single with/without roommate Varies Close to school, friends Access to MARTA Seek vibrant, mixed-use setting Highly mobile Security conscience	
Occupation Age Household Size Income Motivations/Preferences		Service, technical, administrative 25 to 50 1 to 2 persons, some with children \$25,000-\$40,000 Access to work/downtown/MARTA Value convenience/security Highly mobile	

Source: Marketek, Inc.

childless individuals who are in their prime career and pre-elderly years will be significantly more flexible in terms of housing and migration patterns than were previous generations at this age. This includes existing empty-nester residents of Avondale Estates who would like to downsize but remain in the community. Experience suggests that these early prospects will have professional, managerial, administrative and clerical occupations.

As housing development in the study area gains momentum, the demand for new housing will be augmented by groups outside of the market area such as married couples with and without children, empty nesters, retirees and professionals that work within commuting distance of their jobs. Avondale Estates' reputation as an affluent, historic, small town community within a short drive of downtown Atlanta will be a key strength in marketing new study area housing.

Recommended Housing Program

Within the estimated demand for 3,865 residential units in the study area, 37% (or 1,477 units) is for-sale product and 63% (or 2,417 units) is rental product. Marketek estimates that the study area has the potential to capture 3% of market area demand for higher density, for-sale product between 2003 and 2013 and 4% of demand for rental product.

In keeping with the residential character of the surrounding neighborhood and accommodating a limited supply of land available for new housing development, small lot, detached single-family units (i.e., cluster homes) and townhouses are recommended for the study area. Based on recent home sales in Avondale Estates and a sample of nearby cluster home listings (*Existing Conditions*), opening price points of cluster homes should range from \$250,000-\$350,000 with townhouses priced from \$180,000-\$250,000. More affordable townhouse units will appeal to first time homebuyers who may work in the area or commute to jobs throughout the MSA. Larger, more expensive cluster homes will appeal to move-up or move-over buyers as well as empty nesters/retirees. Linking new housing to green space and common areas will not only help compensate for small lots but also enhance Avondale Estates' pastoral image and promote connectivity. A handful of homes could also offer "in-law" units to increase density and housing options while preserving the area's single-family character. While there is clearly demand for units priced above \$350,000, it is our opinion that when unit prices rise above this level – particularly in the early phase of redevelopment – demand will begin to thin out.

Based on current monthly rents at market rate rental communities surveyed in the competitive market area, market rents in the range of \$950 to \$1,100 for a two-bedroom unit would be achievable in the study area. These rents justifiably exceed average rents at several of the projects surveyed (including Avondale Station located in the study area) as the type of rental product envisioned for the study area will be new, developed in a mixed-use setting, accessible to MARTA and have amenities not offered at many of the nearby apartment communities. Community and unit amenities at competitive rental projects as well as a

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

Live/work units, both for-sale and rental, should be considered to accommodate growing numbers of people who are seeking larger than average space that is adaptable to living and working. Existing industrial/warehouse space could be redeveloped as live/work units, averaging in size from 1,200 to 1,500 square feet and priced according to finish.

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

Residential Development Guidelines

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

- **Environment.** Significant challenges to ensuring a high quality of life are not only economic but also environmental. Environmental issues relate to public image, safety, parking, traffic flow, design and architecture, street life and creating a sense of community.
- **Security.** Security features such as alarm systems, controlled access to parking and interior areas, exterior lighting, intercoms, illumination of all areas where residents circulate and design features that discourage crime will be a requirement of new housing located in the study area. Housing units that are elevated above retail and parking foster a sense of security. While security features are a prime marketing asset, it is vitally important that they are not so overwhelming that they create a feeling of fortification between the development and the surrounding community.
- **Parking.** Secured, convenient parking is a requirement for housing development. Experience in other communities has shown that many prospective residents see a possible lack of parking as a disadvantage of mixed-use living. While parking is a necessity for housing development, it can be financially draining especially in dense, mix-use settings. Shared parking and providing cars for temporary use are examples of how to reduce resident parking demand. New parking should be well designed and integrated into the community (e.g., underground parking or landscaped surface parking hidden from the street).

-
- **Public Relations.** Working with the local media to highlight success stories and monitoring construction throughout the study area will help convince target markets that new housing in the study area is an attractive and unique lifestyle choice. Other effective forms of communication include newsletters and websites that keep potential residents up-to-date on special events and redevelopment activity.
 - **Quality Product.** New housing must offer high quality product in terms of design and amenities. The challenge is balancing what consumers can pay with what they want. The most frequently desired unit amenities will likely include: washer/dryer, security system, on-site parking, patio or balcony, storage space, interesting views/architecture, hardwood floors and windows/natural light.
 - **Design Qualities.** The design of new construction should be distinctive and relate to Avondale Estates. New housing development should be diverse in terms of materials, finishes and elevations. Niche projects that have a small number of units and unique architectural style have proven popular in other comparable areas, particularly in the for-sale market. Many successful rental projects incorporate features that were once reserved for owner-occupied homes. Developers have used the following techniques to enable residents of rental communities to feel less like renters: design private street level entrances, assign street addresses to individual units, provide garages and storage with direct access to the unit, incorporate courtyards and use building materials and architectural styles consistent with surrounding single-family homes.
 - **Support Services.** Although study area residents will more than likely use their cars or MARTA to commute to work, the promise of being able to walk to shop, eat out or do errands is a significant selling point for new housing. Besides proximity to restaurants and shopping, study area residents will desire access to groceries and convenience goods, pharmaceutical services, a post office and a range of services such as dry cleaner/laundry, apparel and footwear repair, video rental, film processing, hairstyling, etc.
 - **Local Commitment to Residential Development.** The city of Avondale Estates will need to make a strong commitment to housing development in the study area with appropriate land use regulatory policies, assistance with land acquisition, creative financing to bridge economic gaps, tax incentives and adequate infrastructure. A continuing commitment to support new housing is critical to nurture developer and resident confidence, as well as to enhance financial feasibility.
-

Block 24

Residential Price per Acre: \$406,870
 Demolition Cost Per Acre \$54,450
 Development Price per Acre: \$461,320

Units/ Acre	Per Unit Land Cost	Unit Price
4.5	\$102,515.57	\$569,531
8	\$57,665.01	\$320,361
10	\$46,132.01	\$256,289
12	\$38,443.34	\$213,574
14	\$32,951.43	\$183,064
18	\$22,603.89	\$125,577
20	\$20,343.50	\$113,019
24	\$16,952.92	\$94,183
28	\$14,531.07	\$80,728
30	\$13,562.34	\$75,346
36	\$11,301.95	\$62,789

Block 21

Residential Price per Acre: \$348,787
 Demolition Cost Per Acre \$54,450
 Development Price per Acre: \$403,237

Units/ Acre	Per Unit Land Cost	Unit Price
4.5	\$89,608.31	\$497,824
8	\$50,404.67	\$497,824
10	\$40,323.74	\$280,026
12	\$33,603.12	\$186,684
14	\$28,802.67	\$160,015
18	\$22,402.08	\$124,456
20	\$20,161.87	\$112,010
24	\$16,801.56	\$93,342
28	\$14,401.34	\$80,007
30	\$13,441.25	\$74,674
36	\$11,201.04	\$62,228

Block 18

Residential Price per Acre: \$596,661
 Demolition Cost Per Acre \$54,450
 Less Retail Land Allocation: **-\$55,000**
 Development Price per Acre: \$596,111

Units/ Acre	Per Unit Land Cost	Unit Price
4.5	\$132,469.18	\$735,940
8	\$74,513.91	\$735,940
10	\$59,611.13	\$413,966
12	\$49,675.94	\$275,977
14	\$42,579.38	\$236,552
18	\$33,117.29	\$183,985
20	\$29,805.56	\$165,586
24	\$24,837.97	\$137,989
28	\$21,289.69	\$118,276
30	\$19,870.38	\$110,391
36	\$16,558.65	\$91,992

Block 20

Residential Price per Acre:	\$536,966
Demolition Cost Per Acre	\$54,450
Less Retail Land Allocation:	-\$55,000
Development Price per Acre:	\$536,416

Units/ Acre	Per Unit Land Cost	Unit Price
4.5	\$119,203.64	\$662,242
8	\$67,052.05	\$662,242
10	\$53,641.64	\$372,511
12	\$44,701.37	\$248,341
14	\$38,315.46	\$212,864
18	\$29,800.91	\$165,561
20	\$26,820.82	\$149,005
24	\$22,350.68	\$124,170
28	\$19,157.73	\$106,432
30	\$17,880.55	\$99,336
36	\$14,900.46	\$82,780

AVONDALE ESTATES TASK FORCE MEETING AGENDA
OCTOBER 23, 2003
7:00 – 8:30 pm

Introductions

Project Overview

Information Gathering Session: Introductory Questions

- Questionnaire
- Q & A

Conduct Beta Visual Preference Survey

(Continue) Information Gathering Session: Downtown District
Focus

First Impressions of Commercial Status/Prospects

Summary and Wrap-up



City of Avondale Estates
"A haven of health and happiness!"

Please take an on-line survey prior
to this workshop.
Visit: www.tunspan.com/avondale

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INVITE YOU TO ATTEND A UNIQUE WORKSHOP TO
HEAR YOUR INPUT ON THE FUTURE OF THE
COMMERCIAL BUSINESS DISTRICT

JANUARY 14TH, 2004 FROM 5pm - 9pm



AVONDALE ESTATES CITY HALL
21 NORTH AVONDALE PLAZA
AVONDALE ESTATES, GA 30002

BRING YOUR NEIGHBORS.....
REFRESHMENTS SERVED

PLEASE RSVP BY JANUARY 5, 2004

(404) 294-5400 kholmes@avondaleestates.org

AVONDALE ESTATES WORKSHOP AGENDA DOWNTOWN MASTER PLAN

January 14, 2004: 5:00 – 9:00 p.m.

- Introductions and Study Overview
- Interactive Presentations
 - “Creating a Successful Shopping District”
 - Results of Image Preference Survey
- Introduction to Opportunities and Constraints

Break and Refreshments

- Breakout Groups
 - Land Use Preferences
 - Transportation and Circulation Proposals
 - Building Massing
- Group Presentations
- Next Steps

AVONDALE ESTATES WORKSHOP AGENDA
January 14, 2004: 5:00 – 9:00 pm

Minutes (Total Time: 3.5 hrs)

- Introduction of Team + Brief Overview of the Project 10
 - o Show PP slide of study area boundary
- “Elements of Place” PP Presentation 30
 - o “Free form” (integrated presentation by all)
 - o Include archetypes of elements, then compare with specific examples found within AE
 - o Include examples of “good” shopping districts
 - Compatible in scale to AE
 - Photos and note elements that make them successful
- Results of the IPS PP Presentation 40
 - o Summary of question responses
 - o Summarize/show images of most and least preferred by category
 - o Probe/ask WHY? the images were liked or disliked
 - o Have supporting data on boards that may address issues they bring up
 - E.g. Traffic count data at intersections at various times of day
 - Impact on traffic from added density
 - Retail and housing demand
- Break: Have refreshments, set up tables for breakout groups 20
(optimally 8-10 people at a table)
- Consultant team presents (to all) already prepared maps: 20
 - o Constraints Map (PP slide)
 - o Opportunities Map (PP slide)
- Breakout group work 60
 - o Have participants draw desired land uses on overlay of study area
 - Educate on meaning/opportunities for some residential and mixed use advantages
 - o Have participants then draw in transportation and circulation improvements
 - o Then participants to do “mass placement” of blocks exercise
 - Take photo of results
- Rep from each group presents highlights/results to entire group 30
- Summary: Let everyone know next steps and date of presentation of full report

PREPARATION FOR WORKSHOP

- | | |
|---|----------------------------|
| 1. Create PP “Elements of Place” presentation | Caleb |
| 2. Create “IPS Results” PP presentation | Laura/Chris |
| a. Need to stop survey taking on January 11 | |
| b. Question portion must be tabulated manually | |
| 3. Buy aerial of study area | Caleb |
| a. Also get topo map from Warren | |
| 4. Create figure ground map when aerial received | Laura or Chris |
| 5. Pre-meetings with subs week of January 5 + January 12 | All |
| a. Wed Jan 7 at 9:00 | |
| b. Mon Jan 12 at 3:30 | |
| 6. Get Eleanor/Stuart issue resolved before sub meetings | Caleb/Tom |
| 7. Measure curb-to-curb and blocks of study area | Chris |
| 8. Do rough concept alternatives of land use/density | Laura/Caleb |
| a. Get subs input | |
| b. Use as guide in steering workshop discussions | |
| 9. Create 2 maps and add to PP presentation | Team input (Laura to draw) |
| a. Constraints | |
| b. Opportunities | |
| c. Have 11x17 versions for each table (10 sets) | |
| 10. Assemble props | |
| a. 50 scale Base Maps with trash overlay already adhered: | Caleb/Chris |
| i. Qty: 10 ? | |
| b. 10 sets of markers (add to what we have as necessary) | Chris |
| c. 10 Flip chart tablets and black markers | Chris |
| i. need to buy more | |
| d. As many easels as we have | Chris |
| e. Name tags | Chris |
| f. List of questions and procedures for table facilitators | Laura |
| i. Create this | |
| g. 10 sets of blocks | Laura |
| i. need to buy | |
| h. Extra trash | Chris |
| i. <u>Bring camera</u> | Laura |

11. Define who needs to attend the workshop from TSW and subs

- a. Table facilitators (dependent upon expected turnout – bring up at 1/5 staff mtg)
 - (1) Tom
 - (2) Caleb
 - (3) Laura
 - (4) Eleanor
 - (5) Dan
 - (6) Alycen
 - (7) Christopher
 - (8) Stuart
 - (9) Clint
 - (10) Bill

12. Who is providing refreshments/dinner? **City of Avondale/Warren – confirm**

13. When will we get estimate of number of attendees? – **ask Warren**

14. Where will the workshop be held? Need tables and chairs to accommodate turnout. – **ask Warren**

BREAKOUT TABLE AGENDA

1. First ask: What uses do you want to see in the Downtown District? How much of each do you think is appropriate? (If they don't want residential, probe on why. Educate on benefits of residential + various alternatives they may not have considered (e.g living on 2nd floor of retail shops or offices, or live-work type complexes)
2. Use the following colors/markers and ask where the land uses they discussed in a. should go within the Downtown area. Draw bubble diagrams on overlay.
 - a. Red: Commercial/retail only
 - b. Orange: Mixed Use
 - i. Retail with housing above
 - ii. Retail with office above
 - iii. Office with housing above
 - c. Yellow: Residential
 - d. Blue: Industrial
 - e. Purple: Civic
 - f. Green: Open space, greenspace, or gathering areas
 - g. Brown: Small/professional office
3. Use the following colors/markers - ask where these should go. Draw on overlay.
 - a. New roads (black solid line)
 - b. New sidewalks (gray solid line)
 - c. Bus routes or stops (dashed black lines)
 - d. Circle intersection improvement areas and what the improvement is supposed to remedy
 - e. Note any other changes desired regarding circulation.
4. Have participants take blocks and mass proposed buildings in appropriate areas on map. Colors do not have meaning. Shape, height is important, relative to each other.
5. Photograph the map with the blocks on it – take several angles.
6. Ask for volunteer to present group's maps

downtown estates master Plan

Downtown Estates Downtown Master Plan

Workshop

5:00 - 9:00 PM, Wednesday, January 14, 2004

Sign-In

Name

1. CHRIS FISK ✓
2. HOLLY LAUBMANN RECTOR ✓
3. David Greenberg ✓
4. TISH MC ELROY ✓
5. Ted Waters ✓
6. Olympia F. Manning
7. Michael Halson
8. Mick Smith ✓
9. David Wyse ✓
10. Christina Salviski ✓
11. JUANITA (NITA) D'ARCA ✓
12. Marji McCullough ✓
13. Sandra Nere
14. Janet Williams ✓
15. TALIA BLANCHARD ✓

Downtown Estates Downtown Master Plan

Workshop

5:00 – 9:00 PM, Wednesday, January 14, 2004

Sign-In

Name

1. Algon Wilder
2. Jennifer Topinka ✓
3. William Hovet ✓
4. Robert Cross
5. Leanne Valentine + Kevin Morris
6. Sandra Elek ✓
7. Renee Kirlin ✓
8. Walt Thornton ✓
9. Kathy Bellamy
10. Scott Vossato ✓
11. Bryan Gontz ✓
12. JOE GARGIULO
13. Ken and Julie Feely ✓
14. Norma PRUS ✓
15. _____

Downtown

Downtown Estates Downtown Master Plan

Workshop

5:00 – 9:00 PM, Wednesday, January 14, 2004

Sign-In

Name

1. Jim Glover
2. Jim Ann Harrell
3. STACIE BEARDEN ✓
4. Frank Putnam ✓
5. DAVID SKOLSKY ✓
6. Les Coffey ✓
7. MARION MUNAGIAN ✓
8. Michael Payne ✓
9. SANDRA VARIAN (COMMISSIONER)
10. GAIL RONAN ✓
11. DAVID BECKNER ✓
12. Owen Beckner ✓
13. Peggy Roney ✓
14. Mike T. Baylon ✓
15. Bert Estes

Downtown Estates Downtown Master Plan

Workshop

5:00 – 9:00 PM, Wednesday, January 14, 2004

Sign-In

Name

1. Betty Jones
2. Larry Jones ✓
3. Allan Kirwan
4. John Tolmach ✓
5. Alice Thornton ✓
6. Patricia Calcagno ✓
7. TIM DAY / BRIAN SALTER ✓
8. Sam Rochman ✓
9. RICHARD STEINER ✓
10. FRED KEENEY ~
- 11.
- 12.
- 13.
- 14.
- 15.

Avondale Estates Downtown Master Plan

Task Force Meeting
April 14, 2004

AGENDA

- I. Introductions
- II. Community Vision
- III. Market Realities
- IV. Favorite Images
- V. Draft Concept Plan
- VI. Questions and Answers
- VII. Adjourn

Avondale Estates Downtown Master Plan

Task Force Meeting

7:00 – 9:00 PM, Wednesday, April 14, 2004

Sign-In

Name

1. Jason Rooks

2. BLAKE BREWSTER

3. FRANK PUTMAN

4. Jane Howe

5. HOLLY LAUBMANN RECTOR

6. MIET MARTIN

7. DON CONNELLY

8. Michael Payne

9. TIM GIBARD

10. SANDRA VARIAN

11. Bonnie Kallenberg

12. JERRY MCCUMBER

13. Bob Gross

14. SAM COLLIER

15.

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. BOBKY BREEN & STEVE TRAVIS

2. Jerry Gager

3. Diane Fisk

4. Chris Fisk

5. Kate Harper

6. LEONARD BENUCCI

7. Maji McLough

8. Amy Leonard

9. GUATAM RESIDE

10. DAVID LANKSHEAR

11. KEVIN GEESLIN

12. Bob Ewing

13. Norman Paterson

14. Jo Ann Gerson

15. Carol Rowe

16. Doug & Bonnie Chafin

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. GARRY CARSON

2. JOHN F. ELLISON

3. Barbara Swint

4. Mary Swint

5. Sidney & Red Murphy

6. Marshall Murphy

7. DAVID LEE JONES

8. Anya Cutrufo

9. SAM COLLIER

10. Revell Sanson

11. Leonard Sanson

12. Olympia Manning

13. Beth Worlage

14. Kevin Fay

15. Bonnie Kallenberg

Davis Fox

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. *Laura A. Goldband*
2. *Howard H. Witz*
3. *Clark V. Sunford*
4. *DOUG GLASGOW*
5. *Teff LaRocco*
6. *Robin LaRocco*
7. *Wendy Cromwell*
8. *Sherrie J. Hunt*
9. *CHRIS KINGSBURY*
10. *Kathy Kingsbury*
11. *Kristi Holbensen*
12. *Dale Mooney*
13. *Maira Bucciarelli*
14. *Deanna McArthur*
15. *Herbert Gilchrist*

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Frank Taylor
2. DAVE + TALIA BLANCHARD
3. Danella Mable
4. EDWARD O. TRAVE
5. Roy Abernathy
6. Kate Lesser
7. Dennis Burns
8. Patricia Calcagno
9. Greg Nott
10. Ben Bell
11. AMY Noack
12. ALAN DION
13. JEHANI CHRISTOPHER
14. Norma Masters
15. Julian L. Davis

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Mark NUNES
2. Rapley & Yvonne
3. JOE GARGIULO
4. DANA RECTOR
5. Jason Kelly Richardson
6. Hank Clark
7. Norman Hume
8. Jane Howe
9. MARK WATKINS
10. Ed & Lucille Huggins
11. Rachel Rustin
12. Margaret J. Rolley
13. Ann Finley
14. Fran Davis
15. Bryan Kord

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. HOLLY LAUBMAN/IN RECTOR
 2. Lin Inlow
 3. Tom Delaney
 4. Sondra Elek
 5. Matt Cornick
 6. Jack Reimer
 7. Renelle Massey
 8. Mike & Linette Barber
 9. Sandra Marc
 10. BOB MEANS
 11. Mel Myer
 12. Tim Monacell
 13. Stephany Cross
 14. Anne Kerner
 15. Denise & Steve Forrester
- Alivia LeRusso

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Tom Shoup
2. TED KEENEY
3. Lindy Newman-Charles Absher
4. Walter M. Thronton
5. Lois C. Kelly
6. Charles E. Kelly
7. Eve Jones
8. Phil Jones
9. Bonnie May
10. Jerry L. Rash
11. Jeffrey Brickman
12. Jeanine Parker
13. Michael O'Keefe
14. DAVID J. SKOLSKY
15. Brenda Shugart

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Kathryn King/Sam Bearden
2. Bill Adams
3. Richard Yelton
4. Kingsbury
5. Karen Gowden
6. Virginia Kinchen
7. 
8. Gilda Jones
9. Elizabeth Ahlquist
10. Ran Bransford
11. Deirdre Wilson
12. Christina Salvski
13. William B. Lyons
14. Dave Boyea
15. Linda Wolf

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Anthony & Alexandra
2. KIM HUMMER
3. GINA HILL
4. Margaret Lunsford
5. Sally WALKER
6. Bob DICKENS
7. Fredrick Foster St John
8. John W. Paul
9. Guess Tochu
10. Lawrence Shaw
11. Thurston Cooke
12. Jeff Mitchell
13. K. Covington
14. GREG CHANDORS
15. Carlos & Luz Monge

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Ann Wilson
2. BLAKE BREWSTER
3. Jim Whately
4. JEFF LASHLEY
5. Janelle Dixon
6. Matt & Sarah Miller
7. Melissa Kelly
8. Dot Smith
9. BILL KALLENBERG
10. Amanda Absher
11. Ulric P. Thompson
12. Carol Webb
13. Donna Fay
14. Dor Coatsworth
15. Linac Coatsworth

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Tim & Susan Williams Roy
2. Chesley Woods
3. Patrick O'Connor
4. Rebecca Burns
5. Amy B. Kover
6. KIRK CHRISTENSEN & JENNIFER KEEN
7. Pattn Rollins
8. Matt Rollins
9. RICK PATE
10. James Tolmach
11. Casey Sambers
12. SUSAN BARTON
13. Denise Crawford
14. Jennifer DeWeese
15. David Schunk

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Jean Orentyoon
2. Jay Rockman
3. Jeff Wolfe
4. Ed Jackson
5. Maritae Jones
6. Carolyn Kennedy
7. PINSLEY MURPHEY
8. John & Kathy Swanner
9. Ken Feely
10. Julie Feely
11. Rutledge Gross
12. Danny Corkran
13. Elisabeth Corkran
14. Joel Truesler
15. BILL CUTTS

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Melitta Hewitt

2. Linda NARDONE

3. Sharon Stokes

4. Allan Kirwan

5. Diane Kirwan

6. George Darden

7. Elizabeth Leonard

8. Nancy Brock

9. Jeanie & Michael Payne

10. J.R. SMITH

11. M. CENOS

12. Todd Pallen

13. Bill Houser

14. Deb Hammacher

15. MICHAEL VANOUS

PHILLIP FEIBISH

SCOTT ERWIN

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. John Mize
2. Harry Skrod
3. Lyda Stradman
4. Julie & Ric Ford
5. TERESA Tucker
6. Mary Smith
7. Janet Wood
8. John Lawan
9. Ruth Osborne
10. Jill Joyner Bush
11. Martin Gada
12. Jackie Mann
13. Bert Ester
14. ~~Erica~~
15. Eric Olson
16. Rhonda Feibish

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. JIM GIRAARD

2. Steve Belford

3. Stephen Sanchez

4. MIKE PARKER

5. Patricia Cooke

6. Roberta Cooke

7. Merrill Shealy

8. Kelly Thompson

9. Mettina van der Veen

10. David Leonard

11. Everett Bronski

12. Tom WATSON

13. Marty Mann

14. J. Elsmoh

15. Mary R. Cunningham

DeMend

Avondale Estates Downtown Master Plan

Public Meeting

7:00 – 9:00 PM, Wednesday, April 28, 2004

Sign-In

Name

1. Renee Kiffin

2. David & Greta Mattingly

3. Ellen Hecken

4. Richard Staruter

5. David Greenberg

6. Raymond & H A Jsie Mooney

7. Jim Davis

8. Karyl Davis

9. Anne Adams Moran

10. Dawn & Pat Maddox

11. Brigitte O'Connor

12. Robin Hughes

13. Chris Hughes

14. Matt Martin

15. RICHARD STEINER

Ted Waters

Ted Penrod

Avondale Estates Downtown Master Plan Character Preference Survey

[[Tunnell-Spangler-Walsh & Associates](#)] [[Entry Form](#)] [[Recommend this to a friend](#)] [[Go Back](#)]

Totals for submitted entries are as follows:

Survey Description:

Part I

The first section includes questions that will be used to gather general background and quantitative data.

Part II

The second section will ask you to rate a variety of photos for your preferences regarding land use and desired character of the Downtown District.

The entire survey should take approximately 30 minutes. Complete the questions in order until you reach the end of the survey.

CONTINUE

 - 14
(100%)
14 - Overall Total

General Information

Do you live in Avondale Estates?

(If you answer No, the next 10 questions will off a 'N.A.' Option.)

Yes

 - 97
(91%)

No

 - 10 (9%)
107 - Overall Total

Do you reside in:

(Non-residents please check N/A)

Single Family home

 - 93 (87%)

N.A

 - 7 (7%)

Townhouse

 - 4 (4%)

Condominium

 - 3 (3%)

107 - Overall Total

How long have you lived in Avondale Estates?

(Non-residents please check N/A)

More than ten years

 - 41 (38%)

Three to ten years

 - 29 (27%)

One to three years

 - 25 (23%)

N.A

Less than one year

■ - 8 (7%)

■ - 4 (4%)

107 - Overall Total

Approximately how far away do you live from the Downtown District?**(Non-residents please check N/A)**

within a half mile

one half mile to one mile

N.A

more than one mile

■ - 51 (48%)

■ - 44 (41%)

■ - 7 (7%)

■ - 5 (5%)

107 - Overall Total

Have you ever walked from your home to the Downtown District?**(Non-residents please check N/A)**

Yes

N.A

No

■ - 93 (88%)

■ - 7 (7%)

■ - 6 (6%)

106 - Overall Total

Do you have children living at home?**(Non-residents please check N/A)**

No

Yes, 1 child

Yes, 2 children

N.A

Yes, 3 or more children

■ - 67 (63%)

■ - 17 (16%)

■ - 12 (11%)

■ - 10 (9%)

■ - 1 (1%)

107 - Overall Total

What are the ages of your children? (You can check more than one box)**(Non-residents please check N/A)**

do not have children

N.A

older than 18

ages 5 - 12

ages 1-4

ages 13 - 18

less than 1 year old

■ - 49 (46%)

■ - 17 (16%)

■ - 13 (12%)

■ - 9 (8%)

■ - 7 (7%)

■ - 7 (7%)

■ - 4 (4%)

106 - Overall Total

What is your age?**(Non-residents please check N/A)**

35 - 49	██████ - 43 (40%)
50 - 64	██████ - 29 (27%)
22 - 34	██████ - 22 (21%)
N.A	█ - 8 (7%)
65 or greater	█ - 5 (5%)
107 - Overall Total	

How often do you use MARTA?

(Non-residents please check N/A)

a few times per year	██████████ - 71 (66%)
once or more per week	██ - 11 (10%)
one to three times per month	█ - 9 (8%)
N.A	█ - 9 (8%)
never used	█ - 4 (4%)
used once	█ - 3 (3%)
107 - Overall Total	

Which MARTA station do you primarily use?

(Non-residents please check N/A)

Avondale	██████████ - 51 (48%)
Kensington	██████████ - 40 (38%)
N.A	████ - 14 (13%)
have never used MARTA	█ - 1 (1%)
106 - Overall Total	

Where is your primary destination when you use MARTA?

(Non-residents please check N/A)

airport	██████████ - 36 (34%)
sporting venues	██████ - 23 (21%)
other	██████ - 21 (20%)
N.A	██ - 12 (11%)
workplace in Atlanta	██ - 12 (11%)
have never used MARTA	█ - 2 (2%)
workplace not in the City of Atlanta	█ - 1 (1%)
107 - Overall Total	

Where do you work?

other location not in Avondale Estates	██████████ - 69 (65%)
homemaker or retired	████ - 19 (18%)
in a home business in Avondale Estates	██ - 12 (11%)
in a business in Avondale Estates within the Downtown District	█ - 6 (6%)
106 - Overall Total	

Do you own a business located within the Downtown District?

no

 - 100
(93%)

yes

- 7 (7%)

107 - Overall Total

Shopping Information**How often do you go into the Avondale Estates Downtown District excluding going to work or commuting?**

go there occasionally

- 48 (45%)

go more than once a week

- 33 (31%)

go there about once a week

- 25 (23%)

never have

- 1 (1%)

107 - Overall Total

Which of the following types of businesses and services have you used in the Downtown District in the last three months? (Check all that apply)

restaurant

 - 99
(92%)

post office

 - 97
(90%)

City Hall

- 73 (68%)

other services (e.g. dry cleaners, pet grooming, hair salon, etc.)

- 65 (60%)

retail goods (e.g. drugstore, landscape supply)

- 55 (51%)

auto repair/supply

- 21 (19%)

other

- 11 (10%)

professional office (e.g. law office, doctor, etc)

- 9 (8%)

arts/athletic related business

- 5 (5%)

have never used any

- 1 (1%)

bank/credit union

- 1 (1%)

108 - Overall Total

Where do you do most of your grocery shopping?

Kroger at 2875 N. Decatur Road

- 57 (53%)

DeKalb Farmers Market

- 28 (26%)

Publix at 3870 N. Druid Hills Road (Shamrock Plaza)

- 9 (8%)

Other

- 9 (8%)

Kroger at 720 Commerce Drive (Downtown Decatur)

- 4 (4%)

107 - Overall Total

Where do you do most of your dining out?

in Decatur

- 53 (50%)

mixed/go to many different areas

- 37 (35%)

in Avondale Estates
in the City of Atlanta
other area

■ - 9 (8%)

■ - 7 (7%)

■ - 1 (1%)

107 - Overall Total

**Where do you do most of your non-grocery shopping
(e.g. clothing, home furnishings, sporting goods, electronics, etc)**

no primary area/go to many different areas
North DeKalb Mall area
in the City of Atlanta
over the Internet
other area
from catalogs
in Decatur

■ - 64 (60%)

■ - 14 (13%)

■ - 9 (8%)

■ - 9 (8%)

■ - 7 (7%)

■ - 2 (2%)

■ - 2 (2%)

107 - Overall Total

What is your primary reason you go there to shop?

Large selection among several clustered stores
Convenience
Other
Large selection within store
Quality
Atmosphere of the shopping area
Location
Familiarity
Price
Brands carried

■ - 25 (23%)

■ - 25 (23%)

■ - 12 (11%)

■ - 12 (11%)

■ - 9 (8%)

■ - 6 (6%)

■ - 5 (5%)

■ - 5 (5%)

■ - 5 (5%)

■ - 3 (3%)

107 - Overall Total

Your Views on The Downtown District

**Which of the following general types of uses would you like
to see in and think are appropriate for the future Downtown District?
(Check all that apply)**

Restaurants/dining

■ - 98
(91%)

Commercial Retail Goods (e.g. Grocery, clothing, linens, etc.)

■ - 86 (80%)

Services (e.g. dry cleaners, hair salons, etc)

■ - 73 (68%)

Plazas/public gathering places

■ - 70 (65%)

Entertainment (e.g. movie theater, arts venue, etc)

■ - 70 (65%)

Mixed use (apartments over shops)

■ - 69 (64%)

Greenspace/parks

■ - 62 (57%)

Small Offices (e.g. doctors office, law office, etc)

■ - 60 (56%)

Financial (e.g. banks, credit union, etc)

■ - 49 (45%)

Civic functions (e.g. library, school, etc)

■ - 39 (36%)

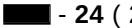
Condominiums

■ - 32 (30%)

Parking Lots	 - 30 (28%)
Townhomes	 - 28 (26%)
Single family homes	 - 14 (13%)
Auto related businesses	 - 8 (7%)
Other	 - 5 (5%)
Large Offices (e.g. multiple tenants or corporate office)	 - 3 (3%)
Apartments (stand alone)	 - 2 (2%)

108 - Overall Total

Regarding stores that sell household furnishings, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Decorating Accessories	 - 67 (62%)
Antiques	 - 67 (62%)
Garden Supplies/Hardware	 - 65 (60%)
Art Gallery	 - 50 (46%)
Bedroom and Bath items (e.g. linens)	 - 39 (36%)
Furniture	 - 24 (22%)
Appliances	 - 4 (4%)

108 - Overall Total

Regarding stores that sell apparel, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Women's	 - 74 (69%)
Men's	 - 56 (52%)
Shoes	 - 49 (45%)
Jewelry	 - 35 (32%)
Children's	 - 34 (31%)

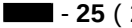
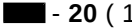
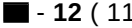
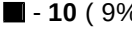
108 - Overall Total

Regarding stores that sell daily needs, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Grocery	 - 82 (76%)
Pharmacy	 - 62 (57%)

108 - Overall Total

Regarding stores that sell specialty, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Books	 - 87 (81%)
Gifts and Cards	 - 83 (77%)
Music/CD's	 - 61 (56%)
Arts and Crafts Supplies	 - 42 (39%)
Toys/Hobbies	 - 27 (25%)
Pet Supplies	 - 25 (23%)
Beauty/Health Supplies	 - 20 (19%)
Computers/Electronics	 - 12 (11%)
Sporting Goods	 - 10 (9%)

Auto Supplies

■ - 4 (4%)

108 - Overall Total

Regarding businesses that provide leisure/entertainment services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Restaurants	■ - 95 (88%)
Live Theater	■ - 56 (52%)
Concerts/Live Music	■ - 52 (48%)
Movie Theater	■ - 44 (41%)
Leisure/Entertainment	■ - 43 (40%)
Exercise/Gym	■ - 33 (31%)
Nightclub/Bar	■ - 29 (27%)

108 - Overall Total

Regarding businesses that provide business/professional services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Bank/Financial Advisor	■ - 57 (53%)
Copy and Mail Center	■ - 53 (49%)
Veterinarian	■ - 48 (44%)
Doctor/Dentist	■ - 46 (43%)
Legal/Accounting	■ - 15 (14%)
Insurance	■ - 13 (12%)

108 - Overall Total

Regarding businesses that provide personal services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Dry cleaner/laundry	■ - 87 (81%)
Tailor/alteration	■ - 79 (73%)
Hair/beauty	■ - 56 (52%)

108 - Overall Total

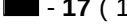
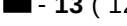
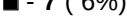
Regarding businesses that provide general services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Video/DVD rental	■ - 77 (71%)
Day Care	■ - 19 (18%)
Repair (appliances, computers, furniture, etc)	■ - 14 (13%)
Auto Repair	■ - 14 (13%)
Education/Training	■ - 11 (10%)

108 - Overall Total

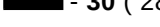
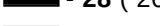
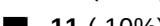
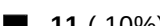
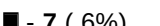
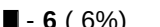
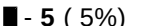
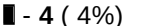
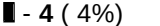
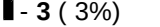
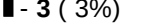
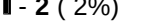
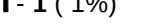
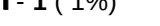
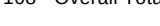
What types of restaurants and eating places are needed in the Downtown District? (Check all that apply)

Deli	■ - 82 (76%)
Bakery	■ - 74 (69%)
Ethnic (Chinese, Italian, Mexican, etc)	■ - 69 (64%)
Coffee House	■ - 68 (63%)

Fine Dining	 - 67 (62%)
Family	 - 60 (56%)
Bar/Grille/Pub	 - 55 (51%)
Pizza	 - 46 (43%)
Cafeteria/Buffer style	 - 17 (16%)
Sports Bar	 - 13 (12%)
Fast Food	 - 7 (6%)

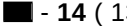
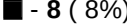
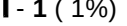
108 - Overall Total

Are there any of the following uses that you do not want to see or think are inappropriate in the future Downtown District? (Check all that apply)

Industrial/manufacturing facilities	 - 84 (78%)
Large office buildings	 - 77 (71%)
Nightclubs	 - 75 (69%)
Fast food restaurants	 - 75 (69%)
Auto related businesses	 - 71 (66%)
Apartments (stand alone)	 - 65 (60%)
Single family homes	 - 42 (39%)
Townhomes	 - 30 (28%)
Parking Lots	 - 28 (26%)
Movie theater	 - 28 (26%)
Condominiums	 - 28 (26%)
Bars/taverns/pubs	 - 17 (16%)
Mixed use (apartments over shops)	 - 12 (11%)
General retail goods	 - 11 (10%)
Grocery	 - 11 (10%)
Civic functions	 - 7 (6%)
Financial services	 - 6 (6%)
Other performing arts venues	 - 5 (5%)
Pharmacy/drugstore	 - 4 (4%)
Plazas/public gathering places	 - 4 (4%)
Small/professional offices	 - 3 (3%)
Personal services (e.g. dry cleaners)	 - 3 (3%)
Parks	 - 2 (2%)
Take-out restaurants (delis, bakeries, etc)	 - 1 (1%)
Table dining/sit -down restaurants	 - 1 (1%)

108 - Overall Total

What is the height for the majority of buildings you would prefer to see in the Downtown District?

two stories	 - 47 (44%)
three stories	 - 35 (33%)
four stories	 - 14 (13%)
don't care or any height	 - 8 (8%)
five to ten stories	 - 1 (1%)

one story

I - 1 (1%)

106 - Overall Total

Several of the Tudor buildings in Avondale Estates are registered as historic buildings. Please describe your feelings about the *existing* Tudor styled buildings in the Downtown District:

Strongly believe these buildings should be retained with their current styling

██████████ - 82 (77%)

Neutral about them

██████ - 22 (21%)

Strongly believe they should be changed to a different style/look

I - 2 (2%)

106 - Overall Total

Please describe your feelings about using the Tudor styling *throughout* the Downtown District:

Don't care either way as long as it's done well

██████████ - 52 (49%)

Should try to make most buildings in same style

██████████ - 47 (44%)

Don't want Tudor styling to go beyond the existing buildings

■ - 7 (7%)

106 - Overall Total

Which of the following words describes your vision for the future of the Avondale Estates Downtown District? (You can check up to three responses)

A small town 'main street' catering to the shopping and services needs of residents and visitors

██████████ - 82 (76%)

A vibrant, dynamic place for residents and visitors for daytime and evening uses

██████████ - 74 (69%)

An urban area that mixes shopping, office, civic and residential uses

██████████ - 42 (39%)

A fun, family oriented destination

██████ - 28 (26%)

A small town 'main street' catering to the shopping and services needs of primarily the residents of Avondale Estates

██████ - 24 (22%)

An area of uses that best increase the tax base for Avondale Estates

■ - 14 (13%)

A predominately residential area with or without some shops

I - 2 (2%)

Something very different than any of the above descriptions

I - 1 (1%)

108 - Overall Total

Which of the following places is most similar to your image of the future of the Avondale Estates Downtown District?

Decatur Square

██████████ - 47 (44%)

Virginia Highlands

██████ - 20 (19%)

Marietta Square

■ - 10 (9%)

Roswell, GA (Historic District area)

■ - 10 (9%)

Don't know

■ - 8 (8%)

Athens, GA

■ - 5 (5%)

None of the above

■ - 5 (5%)

Midtown (Atlanta)

I - 1 (1%)

106 - Overall Total

Instructions:

Avondale Estates Downtown Master Plan Character Preference Survey

[[Tunnell-Spangler-Walsh & Associates](#)] [[Entry Form](#)] [[Recommend this to a friend](#)] [[Go Back](#)]

Totals for submitted entries are as follows:

Survey Description:

Part I

The first section includes questions that will be used to gather general background and quantitative data.

Part II

The second section will ask you to rate a variety of photos for your preferences regarding land use and desired character of the Downtown District.

The entire survey should take approximately 30 minutes. Complete the questions in order until you reach the end of the survey.

CONTINUE

 - 12
(100%)
12 - Overall Total

General Information

Do you live in Avondale Estates?

(If you answer No, the next 10 questions will off a 'N.A.' Option.)

Yes

 - 50
(93%)

No

 - 4 (7%)
54 - Overall Total

Do you reside in:

(Non-residents please check N/A)

Single Family home

 - 51
(94%)

N.A

 - 3 (6%)
54 - Overall Total

How long have you lived in Avondale Estates?

(Non-residents please check N/A)

Three to ten years

 - 17 (31%)

More than ten years

 - 14 (26%)

Less than one year

 - 12 (22%)

One to three years

 - 7 (13%)

N.A

■ - 4 (7%)

54 - Overall Total

Approximately how far away do you live from the Downtown District?**(Non-residents please check N/A)**

one half mile to one mile

■ - 22 (41%)

within a half mile

■ - 21 (39%)

more than one mile

■ - 9 (17%)

N.A

■ - 2 (4%)

54 - Overall Total

Have you ever walked from your home to the Downtown District?**(Non-residents please check N/A)**

Yes

■ - 44 (81%)

No

■ - 8 (15%)

N.A

■ - 2 (4%)

54 - Overall Total

Do you have children living at home?**(Non-residents please check N/A)**

No

■ - 27 (50%)

Yes, 1 child

■ - 13 (24%)

Yes, 2 children

■ - 11 (20%)

N.A

■ - 3 (6%)

54 - Overall Total

What are the ages of your children? (You can check more than one box)**(Non-residents please check N/A)**

do not have children

■ - 19 (35%)

older than 18

■ - 10 (19%)

ages 1-4

■ - 10 (19%)

ages 5 - 12

■ - 7 (13%)

N.A

■ - 4 (7%)

less than 1 year old

■ - 2 (4%)

ages 13 - 18

■ - 2 (4%)

54 - Overall Total

What is your age?**(Non-residents please check N/A)**

35 - 49

■ - 25 (46%)

50 - 64

■ - 14 (26%)

22 - 34

N.A

65 or greater

21 years or less

■ - 9 (17%)

■ - 3 (6%)

■ - 2 (4%)

■ - 1 (2%)

54 - Overall Total

How often do you use MARTA?**(Non-residents please check N/A)**

a few times per year

one to three times per month

never used

once or more per week

N.A

used once

■ - 39 (72%)

■ - 4 (7%)

■ - 4 (7%)

■ - 3 (6%)

■ - 2 (4%)

■ - 2 (4%)

54 - Overall Total

Which MARTA station do you primarily use?**(Non-residents please check N/A)**

Avondale

Kensington

N.A

have never used MARTA

■ - 28 (52%)

■ - 17 (31%)

■ - 6 (11%)

■ - 3 (6%)

54 - Overall Total

Where is your primary destination when you use MARTA?**(Non-residents please check N/A)**

airport

other

sporting venues

workplace in Atlanta

N.A

workplace not in the City of Atlanta

have never used MARTA

■ - 19 (35%)

■ - 13 (24%)

■ - 8 (15%)

■ - 7 (13%)

■ - 3 (6%)

■ - 2 (4%)

■ - 2 (4%)

54 - Overall Total

Where do you work?

other location not in Avondale Estates

homemaker or retired

in a home business in Avondale Estates

in a business in Avondale Estates within the Downtown District

■ - 37 (69%)

■ - 10 (19%)

■ - 5 (9%)

■ - 2 (4%)

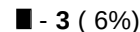
54 - Overall Total

Do you own a business located within the Downtown District?

no


 - 50
(94%)

yes


 - 3 (6%)

53 - Overall Total

Shopping Information**How often do you go into the Avondale Estates Downtown District excluding going to work or commuting?**

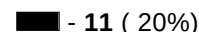
go there occasionally


 - 30 (56%)

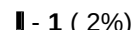
go more than once a week


 - 12 (22%)

go there about once a week


 - 11 (20%)

never have


 - 1 (2%)

54 - Overall Total

Which of the following types of businesses and services have you used in the Downtown District in the last three months? (Check all that apply)

post office


 - 49
(91%)

restaurant


 - 48
(89%)

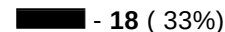
City Hall


 - 33 (61%)

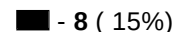
other services (e.g. dry cleaners, pet grooming, hair salon, etc.)


 - 29 (54%)

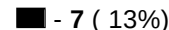
retail goods (e.g. drugstore, landscape supply)


 - 18 (33%)

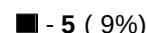
auto repair/supply


 - 8 (15%)

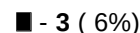
other


 - 7 (13%)

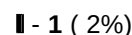
bank/credit union


 - 5 (9%)

arts/athletic related business


 - 3 (6%)

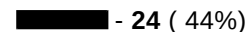
professional office (e.g. law office, doctor, etc)


 - 1 (2%)

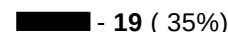
54 - Overall Total

Where do you do most of your grocery shopping?

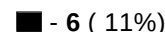
Kroger at 2875 N. Decatur Road


 - 24 (44%)

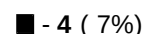
DeKalb Farmers Market


 - 19 (35%)

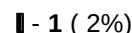
Publix at 3870 N. Druid Hills Road (Shamrock Plaza)


 - 6 (11%)

Other


 - 4 (7%)

Kroger at 720 Commerce Drive (Downtown Decatur)


 - 1 (2%)

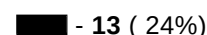
54 - Overall Total

Where do you do most of your dining out?

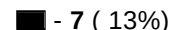
in Decatur


 - 32 (59%)

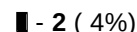
mixed/go to many different areas


 - 13 (24%)

in Avondale Estates


 - 7 (13%)

other area


 - 2 (4%)

54 - Overall Total

**Where do you do most of your non-grocery shopping
(e.g. clothing, home furnishings, sporting goods, electronics, etc)**

no primary area/go to many different areas
in the City of Atlanta
North DeKalb Mall area
other area
over the Internet
in Decatur

■ - 30 (56%)

■ - 7 (13%)

■ - 5 (9%)

■ - 5 (9%)

■ - 4 (7%)

■ - 3 (6%)

54 - Overall Total

What is your primary reason you go there to shop?

Large selection among several clustered stores
Convenience
Atmosphere of the shopping area
Familiarity
Price
Quality
Other
Large selection within store
Location

■ - 18 (33%)

■ - 9 (17%)

■ - 6 (11%)

■ - 5 (9%)

■ - 5 (9%)

■ - 4 (7%)

■ - 4 (7%)

■ - 2 (4%)

■ - 1 (2%)

54 - Overall Total

Your Views on The Downtown District

**Which of the following general types of uses would you like
to see in and think are appropriate for the future Downtown District?
(Check all that apply)**

Restaurants/dining

Entertainment (e.g. movie theater, arts venue, etc)
Plazas/public gathering places
Commercial Retail Goods (e.g. Grocery, clothing, linens, etc.)
Mixed use (apartments over shops)
Greenspace/parks
Services (e.g. dry cleaners, hair salons, etc)
Civic functions (e.g. library, school, etc)
Small Offices (e.g. doctors office, law office, etc)
Financial (e.g. banks, credit union, etc)
Condominiums
Parking Lots
Townhomes
Other
Auto related businesses
Large Offices (e.g. multiple tenants or corporate office)

■ - 53
(98%)

■ - 45 (83%)

■ - 41 (76%)

■ - 41 (76%)

■ - 40 (74%)

■ - 39 (72%)

■ - 38 (70%)

■ - 36 (67%)

■ - 34 (63%)

■ - 26 (48%)

■ - 22 (41%)

■ - 21 (39%)

■ - 16 (30%)

■ - 5 (9%)

■ - 5 (9%)

■ - 4 (7%)

Single family homes

■ - 4 (7%)

Industrial/manufacturing facilities

■ - 3 (6%)

54 - Overall Total

Regarding stores that sell household furnishings, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Antiques

■ - 40 (74%)

Decorating Accessories

■ - 37 (69%)

Garden Supplies/Hardware

■ - 31 (57%)

Art Gallery

■ - 25 (46%)

Bedroom and Bath items (e.g. linens)

■ - 22 (41%)

Furniture

■ - 16 (30%)

Appliances

■ - 4 (7%)

54 - Overall Total

Regarding stores that sell apparel, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Women's

■ - 43 (80%)

Men's

■ - 32 (59%)

Children's

■ - 26 (48%)

Shoes

■ - 22 (41%)

Jewelry

■ - 15 (28%)

54 - Overall Total

Regarding stores that sell daily needs, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Pharmacy

■ - 38 (70%)

Grocery

■ - 36 (67%)

54 - Overall Total

Regarding stores that sell specialty, which type would you be most interested in seeing in the Downtown District? (Check all that apply)

Books

■ - 48
(89%)

Music/CD's

■ - 37 (69%)

Gifts and Cards

■ - 36 (67%)

Arts and Crafts Supplies

■ - 27 (50%)

Toys/Hobbies

■ - 19 (35%)

Beauty/Health Supplies

■ - 15 (28%)

Pet Supplies

■ - 15 (28%)

Computers/Electronics

■ - 8 (15%)

Sporting Goods

■ - 7 (13%)

Auto Supplies

■ - 1 (2%)

54 - Overall Total

Regarding businesses that provide leisure/entertainment services, which type would you

be most interested in seeing in the Downtown District? (Check all that apply)**Regarding businesses that provide business/professional services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)****Regarding businesses that provide personal services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)****Regarding businesses that provide general services, which type would you be most interested in seeing in the Downtown District? (Check all that apply)****What types of restaurants and eating places are needed in the Downtown District? (Check all that apply)**

Pizza	 - 22 (41%)
Sports Bar	 - 12 (22%)
Cafeteria/Buffer style	 - 10 (19%)
Fast Food	 - 2 (4%)
54 - Overall Total	

Are there any of the following uses that you do not want to see or think are inappropriate in the future Downtown District? (Check all that apply)

Industrial/manufacturing facilities	 - 49 (91%)
Large office buildings	 - 40 (74%)
Fast food restaurants	 - 35 (65%)
Nightclubs	 - 33 (61%)
Auto related businesses	 - 32 (59%)
Apartments (stand alone)	 - 32 (59%)
Single family homes	 - 23 (43%)
Townhomes	 - 14 (26%)
Condominiums	 - 13 (24%)
Parking Lots	 - 8 (15%)
Grocery	 - 7 (13%)
General retail goods	 - 5 (9%)
Bars/taverns/pubs	 - 5 (9%)
Mixed use (apartments over shops)	 - 4 (7%)
Civic functions	 - 2 (4%)
Other performing arts venues	 - 2 (4%)
Parks	 - 2 (4%)
Personal services (e.g. dry cleaners)	 - 1 (2%)
Financial services	 - 1 (2%)
Pharmacy/drugstore	 - 1 (2%)
Movie theater	 - 1 (2%)
54 - Overall Total	

What is the height for the majority of buildings you would prefer to see in the Downtown District?

two stories	 - 24 (44%)
three stories	 - 19 (35%)
don't care or any height	 - 6 (11%)
four stories	 - 4 (7%)
one story	 - 1 (2%)
54 - Overall Total	

Several of the Tudor buildings in Avondale Estates are registered as historic buildings. Please describe your feelings about the *existing* Tudor styled buildings in the Downtown District:

Strongly believe these buildings should be retained with their current styling	 - 35 (66%)
--	---

Neutral about them

██████ - 18 (34%)

53 - Overall Total

**Please describe your feelings about using the Tudor styling
throughout the Downtown District:**

Don't care either way as long as it's done well

██████ - 27 (50%)

Should try to make most buildings in same style

██████ - 24 (44%)

Don't want Tudor styling to go beyond the existing buildings

█ - 3 (6%)

54 - Overall Total

**Which of the following words describes your vision
for the future of the Avondale Estates Downtown District?
(You can check up to three responses)**

A small town 'main street' catering to the shopping and services needs of residents and visitors

██████████ - 42 (78%)

A vibrant, dynamic place for residents and visitors for daytime and evening uses

██████████ - 41 (76%)

An urban area that mixes shopping, office, civic and residential uses

██████ - 20 (37%)

A fun, family oriented destination

██████ - 19 (35%)

An area of uses that best increase the tax base for Avondale Estates

█ - 6 (11%)

A small town 'main street' catering to the shopping and services needs of primarily the residents of Avondale Estates

█ - 4 (7%)

Something very different than any of the above descriptions

█ - 1 (2%)

54 - Overall Total

**Which of the following places is most similar to your image
of the future of the Avondale Estates Downtown District?**

Decatur Square

██████████ - 29 (54%)

Virginia Highlands

████ - 11 (20%)

Athens, GA

█ - 3 (6%)

Don't know

█ - 3 (6%)

None of the above

█ - 3 (6%)

The residential area of Avondale Estates south of College Avenue

█ - 2 (4%)

Roswell, GA (Historic District area)

█ - 2 (4%)

Marietta Square

█ - 1 (2%)

54 - Overall Total

Instructions:

Part II: Character Preference Survey

- You are now asked to rate a wide variety of images
- There is no 'right' or 'wrong' answer
- When rating, use your first/initial reaction
 - Is this particular land use appropriate for Avondale Estates Downtown District? Please review the map to see the Downtown District boundary area.
 - Is the character of the image in keeping with your image of the physical environment of the District 10–20 years from now?

CONTINUE

██████████ - 10