TODAY’S AGENDA

1. Welcome & Announcements
2. Introduction to Peer Review
3. Unified Growth Policy Map
5. Metro Atlanta Speaks
6. Comprehensive Economic Development Strategy
Unified Growth Policy Map Discussion
Regional Growth Vision
- Illustrates regional land use policy
- Provides a spatial policy framework
- Provides recommendations for forecasting

So what is the UGPM???
Uses of the UGPM

- DRI Determination
- Forecast development with Research and Analytics
- Roadway design recommendations
- Transportation project selection
- LCI Study selection
- Regional Housing Strategy
Questions for Today

• Does the UGPM reflect the planning challenges of the Atlanta region?
• Should the UGPM be tied stronger to local plans or be a regional aspiration?
• How should ARC work to tie regional investments to the UGPM?
Outcomes

- Growth Distributed Based on Available Land, Trends and Policy
- Many Jobs Proportionally Allocated with New Households
- Small Amount of Land Available in 2030
- Low Density Employment evenly Distributed
Compilation of Local Land Use (1998-2004)

Outcomes

- Similar Population Forecast as Mobility 2030 and Many More Jobs
- Separates Jobs from Households
- Transit Share Decreases
- Delay 36% Higher than to Mobility 2030

Graphs showing:
- Transit Share: Bad, Good
- VMT: Bad, Good
- Delay: Bad, Good
- Imperviousness: Bad, Good
In search of a regional cure

"Sprawl!" still key word in real estate

"Sprawl!" still key word in real estate

Looking to the future: Traffic the top priority

WHO'S IN CONTROL?

Here is the percentage of poll respondents who rated these groups as very influential in the development process:

- Ga. Department of Transportation: 65%
- Land development companies: 60%
- County governments: 43%
- Industry & business associations: 34%
- Georgia Legislature: 27%
- Atlanta news media: 24%
- Environmental agencies: 23%
- Georgia Department of Industry, Trade and Tourism: 22%
- Atlanta Regional Commission: 16%
- Homeowners associations: 11%

Source: AJC poll of 197 metro Atlanta business and political leaders conducted March 5 - April 9, 2016 by the Marketing Workshop.
Local Aspirations

Outcomes

- Reflects Diverse Vision of Local Leaders
- Preserves Forecasted Growth at the County Level
- Locates Higher Density Residential Close to Jobs Along Corridors and In Centers
- Higher Percentage Housing Accessible to Transit
- More Rural Land and Greenspace
- Less Low Density Housing Construction

[Maps and charts showing outcomes related to transit share, VMT, delay, and imperviousness]
Residential Density by UGPM Area Type

- Region Core
- Regional Employment Corridors
- Maturing Neighborhoods
- Established Suburbs
- Developing Suburbs
- Developing Rural Areas
- Rural Areas

Gross Units Per Acre

- 2000
- 2010
- 2019
Activity Center Density Change

- Midtown: 141% increase from 2000 to 2019
- Buckhead: 142% increase from 2000 to 2019
- West Midtown: 262% increase from 2000 to 2019
- City Center: 46% increase from 2000 to 2019
- Cumberland: 50% increase from 2000 to 2019
- Perimeter: 139% increase from 2000 to 2019
- Sandy Springs: 78% increase from 2000 to 2019
- Gwinnett: 68% increase from 2000 to 2019
- Town Center: 49% increase from 2000 to 2019
- North Point: 162% increase from 2000 to 2019

Number of Housing Units

- 2000
- 2010
- 2019
• Each local plan must identify what community classification and density standards from the regional plan
San Francisco

- Local Governments nominate Priority Development Areas that meet criteria about future growth planning, and those areas are eligible for funds
Seattle

- Detailed certification process similar to the Local Implementation Standards from The Atlanta Region’s Plan
- Plan is updated before all Comprehensive Plan Cycle
Questions for Today

• Does the UGPM reflect the planning challenges of the Atlanta region?
• Should the UGPM be tied stronger to local plans or be a regional aspiration?
• How should ARC work to tie regional investments to the UGPM?
A LUCC (Not-That-Long) Look
2021 MAS Results

Jim Skinner, Research & Analytics, Center for Livable Communities, ARC
jskinner@atlantaregional.org
• Origin was 2013 LINK Trip to Houston (now in 10th year)

• **Goals:** Assess Perceptions, Gauge Opinions, Define Priorities
  – Demographic Crosstabs Critical

• **Method 2013-2019:** Random digit dial (RDD) sample survey of residents in the Atlanta Region
  – Added subarea-level significance in 2014
  – Added cell phone segment in 2015
  – 5,200 surveyed in 2019

• **New 2020-21 Method: Mixed-Mode**
  – 2021: RDD of 2,700 respondents (targeted); online panel of 2,100 (targeted)
  – 11 counties and City of Atlanta

• **2021 Focus:** Pandemic Impacts and Equity

• **2021 Sponsors:**
  
  CARES
  The Coronavirus Aid, Relief, and Economic Security Act

  Georgia
  Real Possibilities

  METRO ATLANTA SPEAKS
What We Asked....(2021)

Recurring questions, from prior years

- Biggest Problem of the Region
- The Future: Better, Worse, Same?
- Handling a $400 Emergency
- Assistance from a Food Bank?
- Comfort Paying Mortgage

Racial Equity questions

- Discrimination against Blacks is a serious problem" ranking
- Police Response Options
- Relative Wealth of Blacks v. White
- Racial Equity importance ranking

**Economic/ Workforce Equity questions**

- Economic Equity importance ranking
- Increase Minimum Wage
- Extent of Working at Home in Pandemic
- Preferred Method to Improve Workforce

**COVID-19 specific questions (New and Old)**

- Vaccination Status
- Comfort Level with Normal Activity (relative safety)

**Cross-Tabs** include:
  County, Gender, Race, Age, Ethnicity, Income, Kids or Not, Owner/Renter
Crime was top of mind...everywhere and for (almost) everyone

Economic Equity: Some positive signs, and propping (from stimulus), but pressures in some areas

Racial Equity: Is the window for change opening or closing? Results suggest either trend is possible

The pandemic’s presence and past impact clouded beliefs about the future
## The Biggest Problem?: 2021 by County

<table>
<thead>
<tr>
<th>County</th>
<th>Crime</th>
<th>Public Health</th>
<th>Economy</th>
<th>Transportation</th>
<th>Human Services</th>
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</table>

### Regional Impact + Local Relevance

**SOURCE:** Metro Atlanta Speaks
The Biggest Problem?: 2021 by Age Group

- Transportation: 9.5% (18-34), 9.5% (35-49), 6.9% (50-64), 2.8% (65+), 3.8% (Overall)
- Race Relations: 9.5% (18-34), 7.7% (35-49), 6.9% (50-64), 6.9% (65+), 0.0% (Overall)
- Economy: 12.4% (18-34), 12.4% (35-49), 12.4% (50-64), 12.4% (65+), 12.4% (Overall)
- Crime: 46.2% (18-34), 32.3% (35-49), 46.2% (50-64), 46.2% (65+), 46.2% (Overall)
- Public Health: 12.7% (18-34), 9.0% (35-49), 12.7% (50-64), 9.0% (65+), 9.0% (Overall)
- Public Education: 6.5% (18-34), 3.6% (35-49), 6.5% (50-64), 3.6% (65+), 3.6% (Overall)
- Human Services: 5.3% (18-34), 5.3% (35-49), 5.3% (50-64), 5.3% (65+), 5.3% (Overall)
- Taxes: 4.1% (18-34), 2.8% (35-49), 2.8% (50-64), 2.8% (65+), 2.8% (Overall)
- Other: 5.1% (18-34), 2.8% (35-49), 2.8% (50-64), 5.1% (65+), 2.8% (Overall)
- DK: 2.8% (18-34), 2.8% (35-49), 2.8% (50-64), 2.8% (65+), 2.8% (Overall)
Equity and Economy

Reproduced with thanks from Interaction Institute for Social Change | Artist: Angus Maquarie. Original available from interactioninstitute.org and madewithangus.com
"High levels of income inequality have a negative impact on the economy" by Area 2021
"High levels of income inequality have a negative impact on the economy" by Age 2021

86.6% agree
13.4% disagree

Distribution by Age Group:
- 65+: 22.1%
- 50-64: 37.7%
- 35-49: 37.3%
- 18-34: 26.9%

Strongly agree: 37.7%
Agree: 32.9%
Disagree: 26.9%
Strongly disagree: 10.4%
DK: 5.4%
"High levels of income inequality have a negative impact on the economy“ by Race 2021
"Increasing the minimum wage would be good for the local economy" by Area 2021
"Increasing the minimum wage would be good for the local economy" by Age 2021

Strongly agree: 47.7%
Agree: 32.2%
Disagree: 30.7%
Strongly Disagree: 10.9%
DK: 6.5%

18-34: 31.2%
35-49: 30.7%
50-64: 31.5%
65+: 22.0%

Strongly Disagree: 10.8%
DK: 4.3%

Participants were asked to rate their agreement with the statement on a scale of 0% to 50%.
"Increasing the minimum wage would be good for the local economy" by Race/ Ethnicity 2021

<table>
<thead>
<tr>
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<th>White</th>
<th>Latino</th>
<th>Other</th>
<th>Black</th>
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<tbody>
<tr>
<td>Strongly agree</td>
<td>31.3%</td>
<td>45.4%</td>
<td>42.1%</td>
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<tr>
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<td>32.5%</td>
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<td>28.1%</td>
<td>42.1%</td>
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<tr>
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<td>19.5%</td>
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<td>8.0%</td>
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<tr>
<td>Strongly Disagree</td>
<td>12.3%</td>
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<td>8.9%</td>
<td>3.4%</td>
</tr>
<tr>
<td>DK</td>
<td>0.0%</td>
<td>4.3%</td>
<td>4.8%</td>
<td>6.1%</td>
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</table>
Teleworking (Remote Occasionally or More) 2020 and 2021:

- Cobb: 2020 - 43.1%, 2021 - 61.9%
- Fulton: 2020 - 39.2%, 2021 - 62.6%
- City of Atlanta: 2020 - 37.7%, 2021 - 69.7%
- Cherokee: 2020 - 34.1%, 2021 - 50.4%
- Fayette: 2020 - 34.0%, 2021 - 45.2%
- ARC*: 2020 - 33.0%, 2021 - 58.2%
- DeKalb: 2020 - 31.6%, 2021 - 59.9%
- Rockdale: 2020 - 29.5%, 2021 - 46.0%
- Gwinnett: 2020 - 26.8%, 2021 - 43.7%
- Henry: 2020 - 26.4%, 2021 - 42.4%
- Douglas: 2020 - 24.3%, 2021 - 40.8%
- Clayton: 2020 - 18.8%, 2021 - 52.5%
<table>
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<th>County</th>
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<th>2021</th>
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<td>58.9%</td>
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<tr>
<td>Henry</td>
<td>56.0%</td>
<td>52.1%</td>
</tr>
<tr>
<td>Cherokee</td>
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<td>52.9%</td>
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<tr>
<td>Gwinnett</td>
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<td>50.1%</td>
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<td>DeKalb</td>
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<td>46.0%</td>
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<tr>
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<tr>
<td>Douglas</td>
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<td>49.9%</td>
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<td>Cobb</td>
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<td>Fulton</td>
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<td>City of Atlanta</td>
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<td>Rockdale</td>
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<tr>
<td>Clayton</td>
<td>43.5%</td>
<td>41.0%</td>
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</table>

* ARC Region 10 Counties in 2020; 11 counties in 2021
Could Pay for a $400 Emergency with…by Race/Ethnicity: 2021

- **White**: 56.4%
- **Other**: 49.4% (Cash, Check, Debit), 50.6% (Other Options)
- **Latino**: 45.4%
- **Black**: 43.9% (Cash, Check, Debit), 43.9% (Other Options)
Share Less Than Confident in Ability to Pay Next Mortgage or Rent Payment...2020 and 2021

- Clayton: 44.1% (2020), 41.0% (2021)
- City of Atlanta: 42.3% (2020), 32.7% (2021)
- DeKalb: 38.8% (2020), 34.7% (2021)
- Fulton: 34.9% (2020), 28.3% (2021)
- Henry: 31.5% (2020), 33.3% (2021)
- Rockdale: 33.3% (2020), 31.3% (2021)
- ARC*: 31.7% (2020), 31.8% (2021)
- Douglas: 30.8% (2020), 28.2% (2021)
- Gwinnett: 35.5% (2020), 29.8% (2021)
- Cherokee: 23.9% (2020), 19.5% (2021)
- Fayette: 23.8% (2020), 14.0% (2021)
- Cobb: 37.3% (2020), 20.9% (2021)

* ARC Region 10 Counties in 2020; 11 counties in 2021
### Confidence in Ability to Pay Mortgage or Rent...By Race/ Ethnicity: 2021

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Less than Very Confident</th>
<th>Very Confident</th>
<th>Other*</th>
</tr>
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<tbody>
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<td>Latino*</td>
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<tr>
<td>Black</td>
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<td>54.8%</td>
<td>9.2%</td>
</tr>
<tr>
<td>Other</td>
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<td>55.7%</td>
<td>9.3%</td>
</tr>
<tr>
<td>White</td>
<td>27.9%</td>
<td>54.9%</td>
<td>17.1%</td>
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</table>
Received Food from a Food Bank: Comparing 2020 and 2021

- City of Atlanta: 31.7%, 33.1%
- Clayton: 26.1%, 36.9%
- DeKalb: 25.0%, 25.8%
- Rockdale: 23.5%, 26.0%
- Fulton: 21.3%, 25.7%
- ARC*: 17.9%, 23.9%
- Douglas: 17.0%, 21.3%
- Henry: 15.5%, 26.8%
- Cobb: 14.0%, 24.1%
- Gwinnett: 12.5%, 20.9%
- Cherokee: 8.5%, 25.8%
- Fayette: 7.5%, 10.3%

* ARC Region 10 Counties in 2020; 11 counties in 2021
Received Food from a Food Bank:
By Race/Ethnicity, 2021

<table>
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<tr>
<th>Race/Ethnicity</th>
<th>Yes</th>
<th>No</th>
<th>DK</th>
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<td>29.9%</td>
<td>69.0%</td>
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<tr>
<td>Latino</td>
<td>32.9%</td>
<td>65.5%</td>
<td>0%</td>
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</table>
Question: For All Respondents...

If a typical white family in the United States has 100 units of overall wealth, how many units of overall wealth does the typical Black family have?

*INTERVIEWER: Code number of units 0 – 100. DK/NA = 999*
Ratio of Black Wealth to White Wealth, **By Race**

Relationship of Mean Perceived Black Wealth to Mean White Wealth ...by Race and Ethnicity

- **ACTUAL**: 10
- **Black**: 38
- **ARC 11**: 51
- **Latino**: 52
- **Other**: 53
- **White**: 62
Equity and Race
“Ensuring racial equity is essential to maximizing economic growth in our region” by Area: 2021

- Forsyth: 8.5% Agree, 5.5% Strongly Agree, 24.8% Disagree, 24.0% Strongly Disagree, 31.1% DK
- Cherokee: 4.8% Agree, 6.0% Strongly Agree, 19.8% Disagree, 18.3% Strongly Disagree, 24.0% DK
- Fayette: 6.0% Agree, 7.3% Strongly Agree, 18.3% Disagree, 20.3% Strongly Disagree, 19.8% DK
- Douglas: 5.3% Agree, 6.4% Strongly Agree, 16.7% Disagree, 15.5% Strongly Disagree, 20.3% DK
- Gwinnett: 6.4% Agree, 7.0% Strongly Agree, 14.0% Disagree, 12.8% Strongly Disagree, 20.3% DK
- Henry: 6.4% Agree, 6.3% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- ARC11: 16.7% Agree, 15.5% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- Cobb: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- Rockdale: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- Fulton: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- Clayton: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- DeKalb: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK
- City of Atlanta: 16.0% Agree, 12.1% Strongly Agree, 12.8% Disagree, 16.0% Strongly Disagree, 20.3% DK

Legend:
- Blue: Agree/Strongly Agree
- Red: Disagree/Strongly Disagree
- Green: DK
“Ensuring racial equity is essential to maximizing economic growth in our region” by Age: 2021

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
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<td>18-34</td>
<td>35-49</td>
<td>50-64</td>
<td>65+</td>
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</table>

Note: DK likely stands for 'Don't Know' or 'Prefer Not to Say'.
“Ensuring racial equity is essential to maximizing economic growth in our region“ by Race/Eth: 2021

- **Strongly agree:***
  - White: 31.8%
  - Other: 48.2%
  - Latino: 48.2%
  - Black: 48.2%

- **Agree:***
  - White: 38.0%
  - Other: 39.6%
  - Latino: 5.7%
  - Black: 7.8%

- **Disagree:***
  - White: 15.2%
  - Other: 7.8%
  - Latino: 7.2%
  - Black: 4.3%

- **Strongly disagree:***
  - White: 7.2%
  - Other: 2.2%
  - Latino: 4.3%
  - Black: 2.2%

- **DK:***
  - White: 0.0%
  - Other: 0.0%
  - Latino: 0.0%
  - Black: 0.0%
Discrimination against Black People is a Serious Problem”
Comparing 2020 and 2021

ARC Region 10 Counties in 2020; 11 counties in 2021
“Discrimination against Black People is a Serious Problem” by Age Group: 2021

18-34:
- Strongly Agree: 59.4%
- Agree: 28.2%
- Disagree: 7.2%
- Strongly Disagree: 4.3%

35-49:
- Strongly Agree: 48.0%
- Agree: 29.4%
- Disagree: 10.7%
- Strongly Disagree: 8.4%

50-64:
- Strongly Agree: 42.6%
- Agree: 27.0%
- Disagree: 16.6%
- Strongly Disagree: 10.4%

65+:
- Strongly Agree: 29.4%
- Agree: 32.8%
- Disagree: 21.7%
- Strongly Disagree: 12.4%
Shares Open to Non-Police Response to Every Call by Area, 2020 and 2021

<table>
<thead>
<tr>
<th>Area</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>DeKalb</td>
<td>52.7%</td>
<td>56.4%</td>
</tr>
<tr>
<td>City of Atlanta</td>
<td>49.6%</td>
<td>51.4%</td>
</tr>
<tr>
<td>Fulton</td>
<td>48.4%</td>
<td>48.5%</td>
</tr>
<tr>
<td>ARC*</td>
<td>44.0%</td>
<td>46.1%</td>
</tr>
<tr>
<td>Clayton</td>
<td>43.5%</td>
<td>47.9%</td>
</tr>
<tr>
<td>Gwinnett</td>
<td>41.5%</td>
<td>44.8%</td>
</tr>
<tr>
<td>Douglas</td>
<td>40.3%</td>
<td>44.6%</td>
</tr>
<tr>
<td>Cobb</td>
<td>39.7%</td>
<td>47.5%</td>
</tr>
<tr>
<td>Rockdale</td>
<td>38.8%</td>
<td>44.6%</td>
</tr>
<tr>
<td>Fayette</td>
<td>36.1%</td>
<td>43.0%</td>
</tr>
<tr>
<td>Henry</td>
<td>35.5%</td>
<td>44.5%</td>
</tr>
<tr>
<td>Cherokee</td>
<td>25.7%</td>
<td>32.8%</td>
</tr>
</tbody>
</table>
“How Should Police Best Be Utilized?: by Age Group: 2020

- Respond to all calls
- Leave non-violent calls to other agencies
- DK

18-34:
- Respond to all calls: 57.2%
- Leave non-violent calls to other agencies: 37.2%
- DK: 5.6%

35-49:
- Respond to all calls: 50.5%
- Leave non-violent calls to other agencies: 45.9%
- DK: 3.7%

50-64:
- Respond to all calls: 59.6%
- Leave non-violent calls to other agencies: 35.6%
- DK: 4.8%

65+:
- Respond to all calls: 66.0%
- Leave non-violent calls to other agencies: 28.7%
- DK: 5.3%
The Future
<table>
<thead>
<tr>
<th>Area</th>
<th>Very safe</th>
<th>Moderately/Somewhat Safe</th>
<th>Not safe at all</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cherokee</td>
<td>41.3%</td>
<td>50.3%</td>
<td>6.3%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Fayette</td>
<td>29.8%</td>
<td>60.3%</td>
<td>9.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td>City of Atlanta</td>
<td>25.5%</td>
<td>61.3%</td>
<td>12.2%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Forsyth</td>
<td>25.3%</td>
<td>60.8%</td>
<td>13.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Fulton</td>
<td>24.6%</td>
<td>62.5%</td>
<td>11.9%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Rockdale</td>
<td>24.1%</td>
<td>53.9%</td>
<td>20.1%</td>
<td>2.0%</td>
</tr>
<tr>
<td>ARC 11</td>
<td>22.7%</td>
<td>62.5%</td>
<td>13.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Douglas</td>
<td>22.5%</td>
<td>62.0%</td>
<td>14.5%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Henry</td>
<td>22.4%</td>
<td>60.1%</td>
<td>16.5%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Gwinnett</td>
<td>22.0%</td>
<td>64.3%</td>
<td>12.3%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Cobb</td>
<td>21.5%</td>
<td>62.5%</td>
<td>15.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Clayton</td>
<td>17.9%</td>
<td>64.4%</td>
<td>16.2%</td>
<td>1.5%</td>
</tr>
<tr>
<td>DeKalb</td>
<td>15.4%</td>
<td>66.9%</td>
<td>15.4%</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

How safe does respondent feel resuming normal activities as community recovers from Covid? (Area)...

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%

Very safe  Moderately/Somewhat Safe  Not safe at all  DK
How safe does respondent feel resuming normal activities as community recovers from Covid? (Age)...2021

- **Very safe**
- **Moderately/Somewhat Safe**
- **Not safe at all**
- **DK**

<table>
<thead>
<tr>
<th>Age</th>
<th>Very safe</th>
<th>Moderately/Somewhat Safe</th>
<th>Not safe at all</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>35-49</td>
<td>25.8%</td>
<td>57.1%</td>
<td>15.6%</td>
<td>1.6%</td>
</tr>
<tr>
<td>18-34</td>
<td>25.1%</td>
<td>64.0%</td>
<td>9.9%</td>
<td>1.4%</td>
</tr>
<tr>
<td>65+</td>
<td>19.3%</td>
<td>67.9%</td>
<td>11.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>50-64</td>
<td>18.6%</td>
<td>63.6%</td>
<td>16.2%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>
Looking Ahead 3-4 Years... “Better?” 2020 cf: 2021

<table>
<thead>
<tr>
<th>County</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Atlanta</td>
<td>38.0%</td>
<td>41.1%</td>
</tr>
<tr>
<td>Clayton</td>
<td>35.2%</td>
<td>39.7%</td>
</tr>
<tr>
<td>Fulton</td>
<td>33.5%</td>
<td>39.7%</td>
</tr>
<tr>
<td>DeKalb</td>
<td>30.2%</td>
<td>32.7%</td>
</tr>
<tr>
<td>Cherokee</td>
<td>29.7%</td>
<td>32.7%</td>
</tr>
<tr>
<td>Douglas</td>
<td>29.9%</td>
<td>32.7%</td>
</tr>
<tr>
<td>ARC*</td>
<td>27.9%</td>
<td>32.2%</td>
</tr>
<tr>
<td>Cobb</td>
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<tr>
<td>Rockdale</td>
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<td>32.7%</td>
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<tr>
<td>Gwinnett</td>
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<td>32.7%</td>
</tr>
<tr>
<td>Fayette</td>
<td>30.3%</td>
<td>32.7%</td>
</tr>
<tr>
<td>Henry</td>
<td>25.6%</td>
<td>32.7%</td>
</tr>
</tbody>
</table>
Looking Ahead 3-4 Years (By Race)...2021

<table>
<thead>
<tr>
<th>Race</th>
<th>Better in 3-4 years</th>
<th>Worse in 3-4 years</th>
<th>About the same</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black</td>
<td>30.7%</td>
<td>30.0%</td>
<td>34.4%</td>
<td></td>
</tr>
<tr>
<td>Latino</td>
<td>28.1%</td>
<td>39.1%</td>
<td>28.8%</td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>25.9%</td>
<td>37.1%</td>
<td>32.7%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>25.7%</td>
<td>35.9%</td>
<td>31.2%</td>
<td></td>
</tr>
</tbody>
</table>
For (Much) More Information...

The highlights and more complete analysis: The Atlanta Regional Commission site has a Metro Atlanta Speaks page with overviews, slide decks, the question set, and a downloadable report.

The data: Our 33N research blog has a dashboard with questions and responses dating to 2016.

Data stories: The 33N blog has a page devoted to analysis of Metro Atlanta Speaks results.

Jim Skinner, Data Analyst Administrator
Research & Analytics, Center for Livable Communities, ARC
jskinner@atlantaregional.org
What’s Coming (and *Probably Going*)

- Changes....
  - No 2022 MAS (at least like 2014 to 2021, or maybe not even like 2013)
  - Reason 2: Desire to “Transition to Flexibility”

- **Perhaps** a MAS “1.25” for 2022

- **BUT** MAS 2.0 coming in 2023-24
  - Concept is a community engagement panel-based platform
  - Pilot(s) this Summer--GCO
  - Funding options being explored
Comprehensive Economic Development Strategy (CEDS)
What is the CEDS?

The Comprehensive Economic Development Strategy (CEDS) is a locally-based, regionally-driven economic development planning process and document that creates the space for your region to identify its strengths and weaknesses and brings together a diverse set of partners to generate good jobs, diversify the economy, and spur economic growth.

Current CEDS: CATLYST Regional Economic Competitiveness Strategy - ARC (atlantaregional.org)
• Required for EDA designation as an Economic Development District

• Updated every five years

• Submitted to EDA regional office for approval

• Requirement for various EDA funding including Public Works and Economic Adjustment Assistance programs & CARES Act funding
**CEDS Schedule**

<table>
<thead>
<tr>
<th>TASKS</th>
<th>Jan '22</th>
<th>Feb '22</th>
<th>Mar '22</th>
<th>Apr '22</th>
<th>May '22</th>
<th>June '22</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1/15</td>
<td>1/31</td>
<td>2/15</td>
<td>2/28</td>
<td>3/15</td>
<td>3/31</td>
</tr>
</tbody>
</table>

**Task 1 - ENGAGEMENT**

1.1 - Focus Groups
1.2 - Interviews
1.3 - Surveys
1.4 - General Public Engagement

**Task 2 - Develop Strategic Direction/Action Plan and Evaluation Framework**

2.1 - Economic Profile (Summary Background)
2.2 - SWOT Analysis
2.3 - Strategic Direction/Action Plan
2.4 - Evaluation Framework
2.5 - Economic Resilience Documentation

**Task 3 - Document Format Development**

**Task 4 - Prepare Project Final Deliverables**

4.1 - Draft CEDS Document
Due 5/6
Due 6/10

4.2 - Final CEDS per Committee and ARC Comment

- Draft CEDS Complete
- ARC Adoption of CEDS
SWOT (Data) Analysis Highlights
Guiding Principles

- Strengthen regional economy
- Promote economic resiliency
- Increase equitable capacity

Strengthen regional economy

Promote economic resiliency

Increase equitable capacity
The five most concentrated industry clusters within the Atlanta region are:

1. Information
2. Management
3. Transportation & Warehousing
4. Admin. & Waste Management
5. Wholesale Trade

These clusters remained the same throughout the pandemic and in some cases, such as the Information industry, the cluster grew.

Source: KB Advisory Group, based on data from Bureau of Labor Statistics
## Metro Atlanta’s 20 Largest Employers

<table>
<thead>
<tr>
<th>Employer</th>
<th>Full-Time Metro Area Employees (as of 12/31/20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emory University</td>
<td>32,594</td>
</tr>
<tr>
<td>Delta Air Lines</td>
<td>27,535</td>
</tr>
<tr>
<td>Northside Hospital</td>
<td>23,600</td>
</tr>
<tr>
<td>Gwinnett County Public Schools</td>
<td>21,493</td>
</tr>
<tr>
<td>The Home Depot</td>
<td>18,600</td>
</tr>
<tr>
<td>Wellstar Health Systems</td>
<td>17,740</td>
</tr>
<tr>
<td>Piedmont Healthcare</td>
<td>16,000</td>
</tr>
<tr>
<td>Cobb County Public Schools</td>
<td>12,179</td>
</tr>
<tr>
<td>UPS</td>
<td>11,300</td>
</tr>
<tr>
<td>Fulton County Public Schools</td>
<td>11,172</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employer</th>
<th>Full-Time Metro Area Employees (as of 12/31/20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publix</td>
<td>10,757</td>
</tr>
<tr>
<td>Children’s Healthcare of Atlanta</td>
<td>7,711</td>
</tr>
<tr>
<td>Cox Enterprises</td>
<td>7,417</td>
</tr>
<tr>
<td>Argenbright Holdings</td>
<td>7,410</td>
</tr>
<tr>
<td>State Farm</td>
<td>7,300</td>
</tr>
<tr>
<td>Georgia Institute of Technology</td>
<td>7,180</td>
</tr>
<tr>
<td>Northeast Georgia Health System</td>
<td>7,035</td>
</tr>
<tr>
<td>Georgia State University</td>
<td>5,550</td>
</tr>
<tr>
<td>Cherokee County Public Schools</td>
<td>5,000</td>
</tr>
<tr>
<td>Grady Health System</td>
<td>4,928</td>
</tr>
</tbody>
</table>

Source: KB Advisory Group based on data from Atlanta Business Chronicle
FIRM SIZE

Nearly 60% of those employed in the Atlanta region in 2019 were employed by the largest firms (500+ employees).

However . . .

- Only 3% of all firms in the region have at least 500 employees
- These large firms represent just over 66% of the region’s overall payroll.

FIRM SIZE

Over the past decade, firms with less than 500 employees have been larger net creators of jobs within the region, creating nearly 270,000 jobs vs. 161,000 jobs created by firms with fewer than 500 employees.

For the past decade, the largest firms have consistently had longer longevity compared to smaller firms within the region.

SELF-EMPLOYED BUSINESS OWNERSHIP

Source: U.S. Census Bureau’s Non-Employer Business Statistics
**SELF-EMPLOYED BUSINESS OWNERSHIP**

**Self-Employed Business Owners by Gender**
- Female: 316,510 (52%)
- Male: 290,900 (48%)

**Self-Employed Business Revenue ($1,000s) by Gender**
- Female: $6,987,042 (30%)
- Male: $16,574,557 (70%)

Source: U.S. Census Bureau's Non-Employer Business Statistics
POVERTY RATE, 2020

Source: U.S. Census Bureau
CONCENTRATION of POVERTY, 2020

Source: U.S. Census Bureau
Input Session
What actions are needed to:

• Strengthen the economy?
• Increase equitable inclusion?
• Promote economic resiliency?

What partnerships are needed?
We Want To Hear MORE From You!

Take One of Our Surveys and Share with Others

- Economic Development
- City and Regional Planners
- Government Leaders
- Small Business
- Non-profits
- Faith Based Community
- Creative/Arts Community
- Education
General:
https://app.mirialiti.net/surveys/c579c69b-c424-4bed-91ac-d454a6a8c694

Economic Development/Planning - Community Improvement Districts (CIDs):
https://app.mirialiti.net/surveys/3d841d00-e821-4c51-b1bc-cbdccae96b6f

City and Regional Planners:
https://app.mirialiti.net/surveys/dcf24c35-199b-4710-85bc-f0f88424f0b1

Government Leaders:
https://app.mirialiti.net/surveys/b12ad4b0-e614-462d-98b9-d3cecd32f812
Focus Groups

We Want to Hear MORE From You!

Participate in a Focus Group
- Economic Development Professionals/Planners
- Government Leaders
- Small Business/Workforce
- Education
- Non-profits/Faith Based Community (Joint)
- Creative/Arts Community
- Identified Demographics
Website

Information and updates: atlantaregionalceds2022.org
Thank you!

Keri Stevens
Program Manager, Atlanta Regional Commission (ARC)
404-455-4745
kstevens@atlantaregional.org