

# LUCC

**April 20, 2022**

Arc

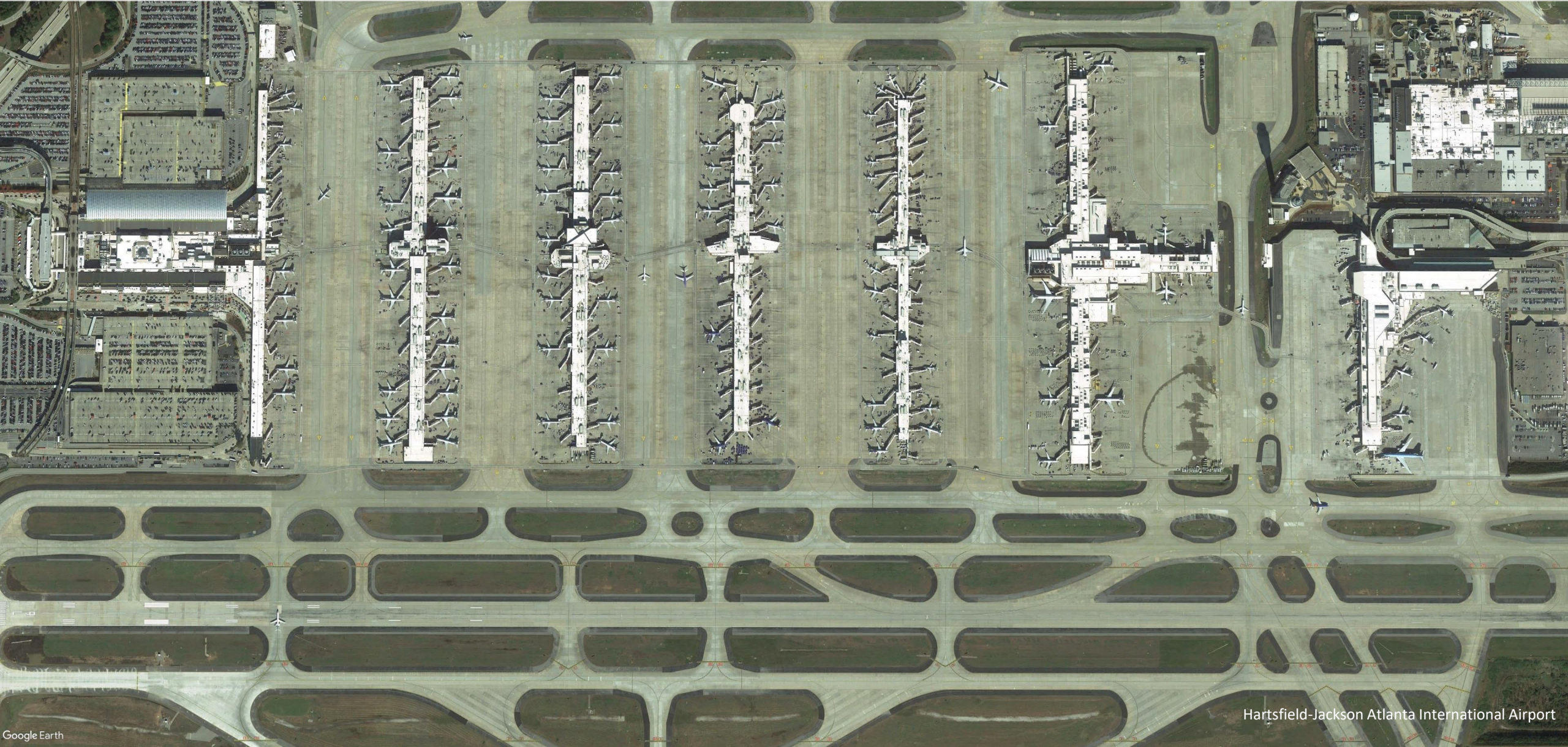
# TODAY'S AGENDA

1. Welcome & Announcements
2. Introduction to Peer Review
3. Unified Growth Policy Map
5. Metro Atlanta Speaks
6. Comprehensive Economic Development Strategy





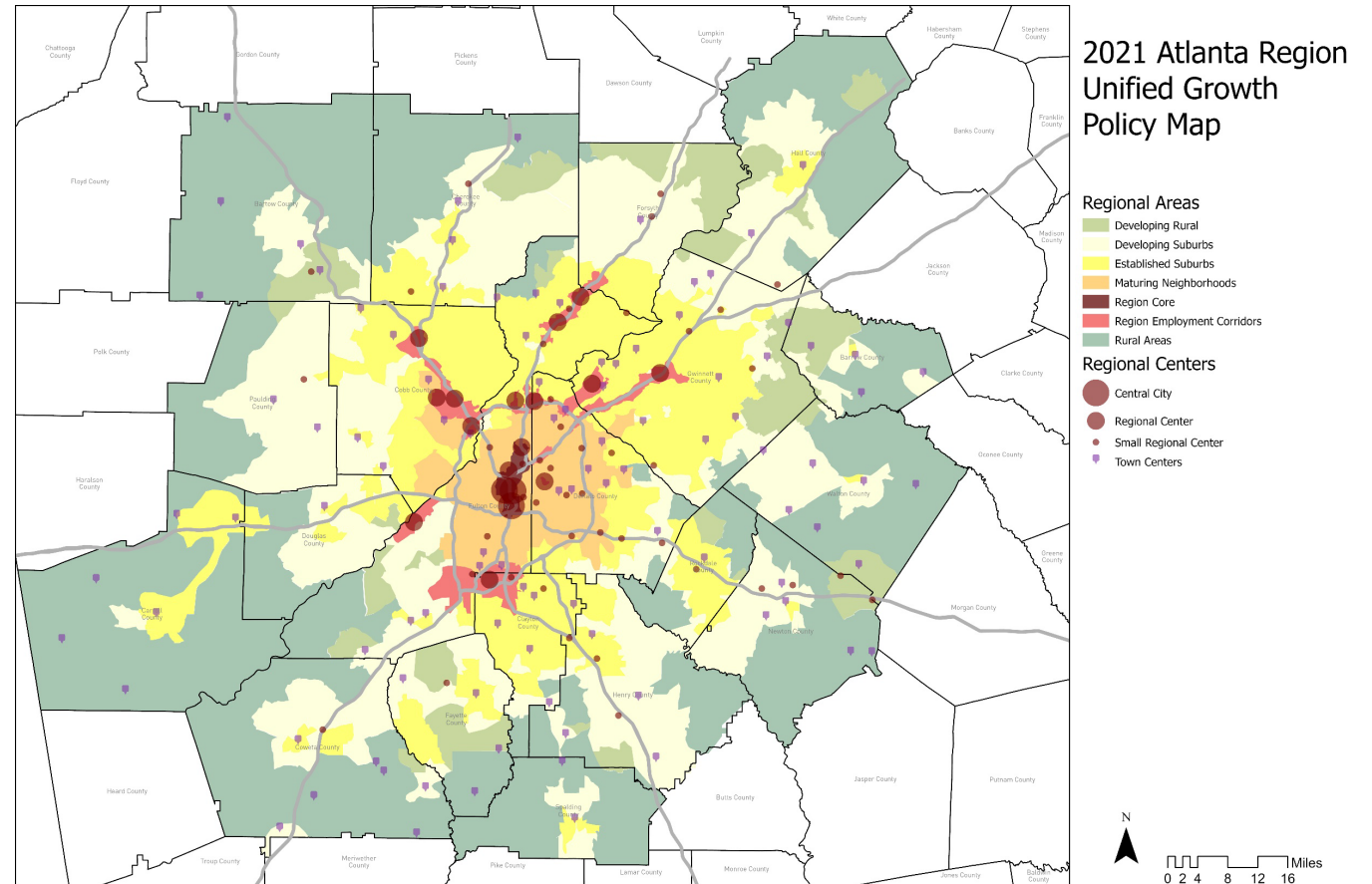
# Unified Growth Policy Map Discussion





# So what is the UGPM???

- Regional Growth Vision
  - Illustrates regional land use policy
  - Provides a spatial policy framework
  - Provides recommendations for forecasting

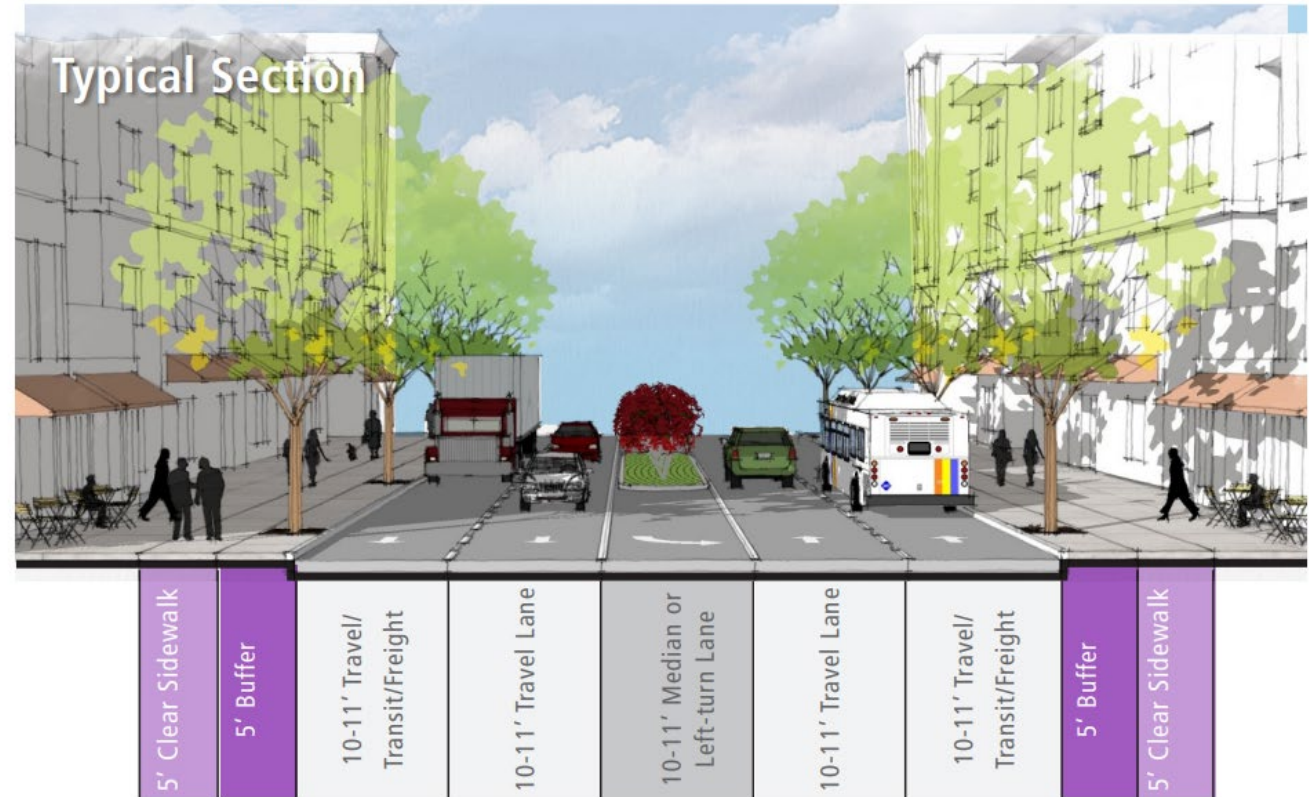




# Uses of the UGPM

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

## Urban Thoroughfare Design *Level I Thoroughfares*



### Urban Areas

- Region Core
- Regional Employment Corridors
- Maturing Neighborhoods

# Questions for Today

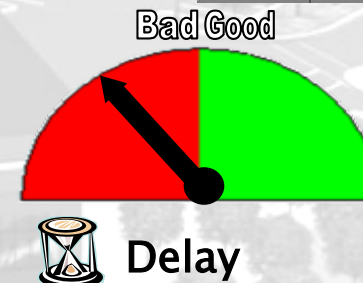
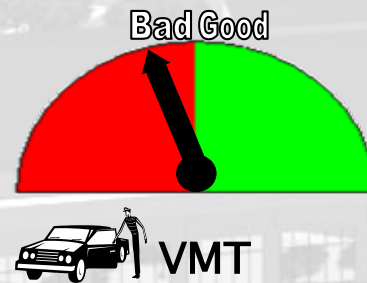
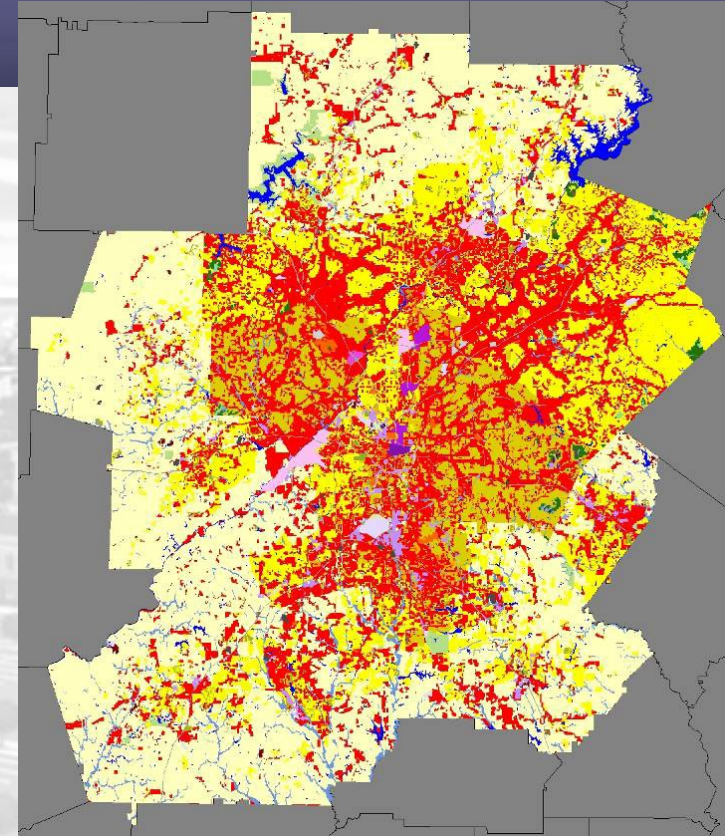
- Does the UGPM reflect the planning challenges of the Atlanta region?
- Should the UGPM be tied stronger to local plans or be a regional aspiration?
- How should ARC work to tie regional investments to the UGPM?



# Mobility 2030 Forecast

## Outcomes

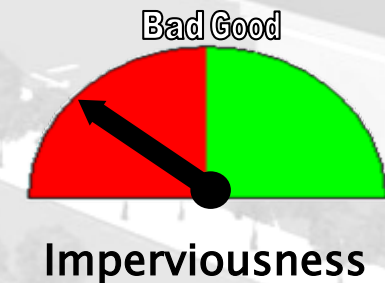
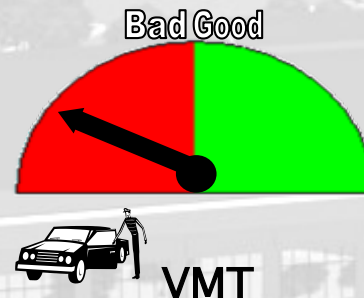
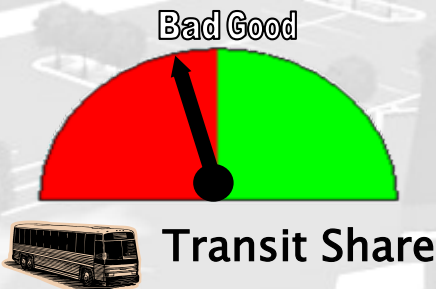
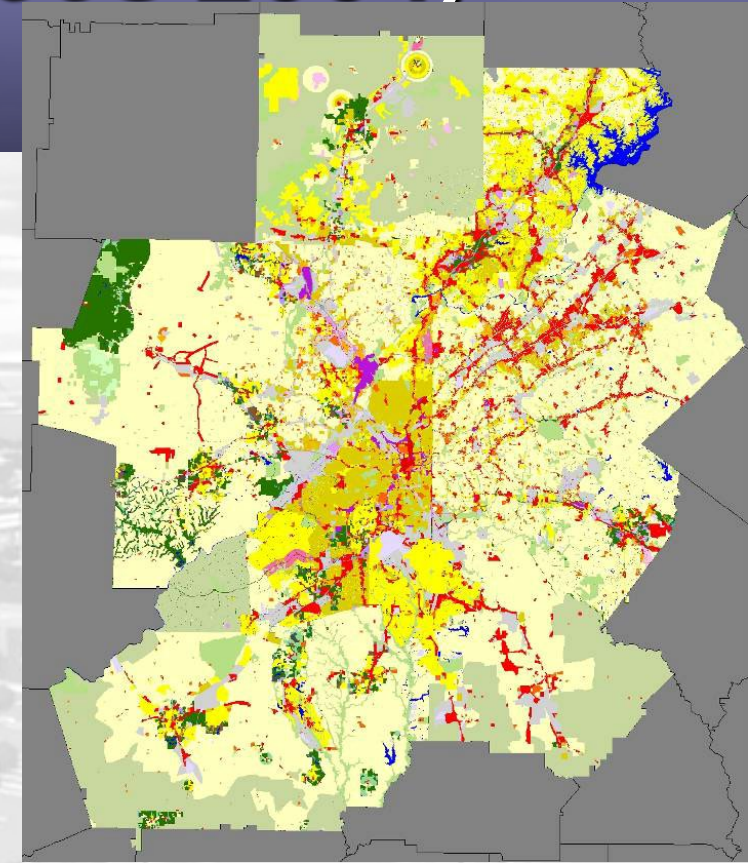
- Growth Distributed Based on Available Land, Trends and Policy
- Many Jobs Proportionally Allocated with New Households
- Small Amount of Land Available in 2030
- Low Density Employment evenly Distributed



# 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



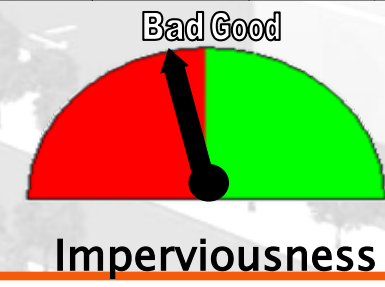
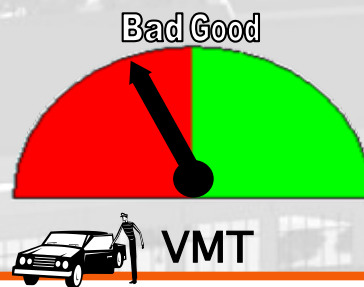
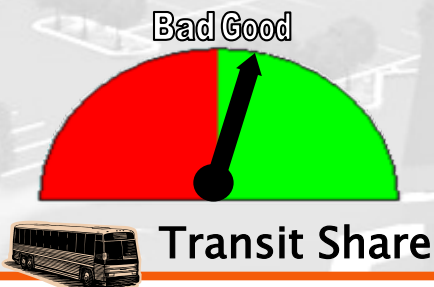
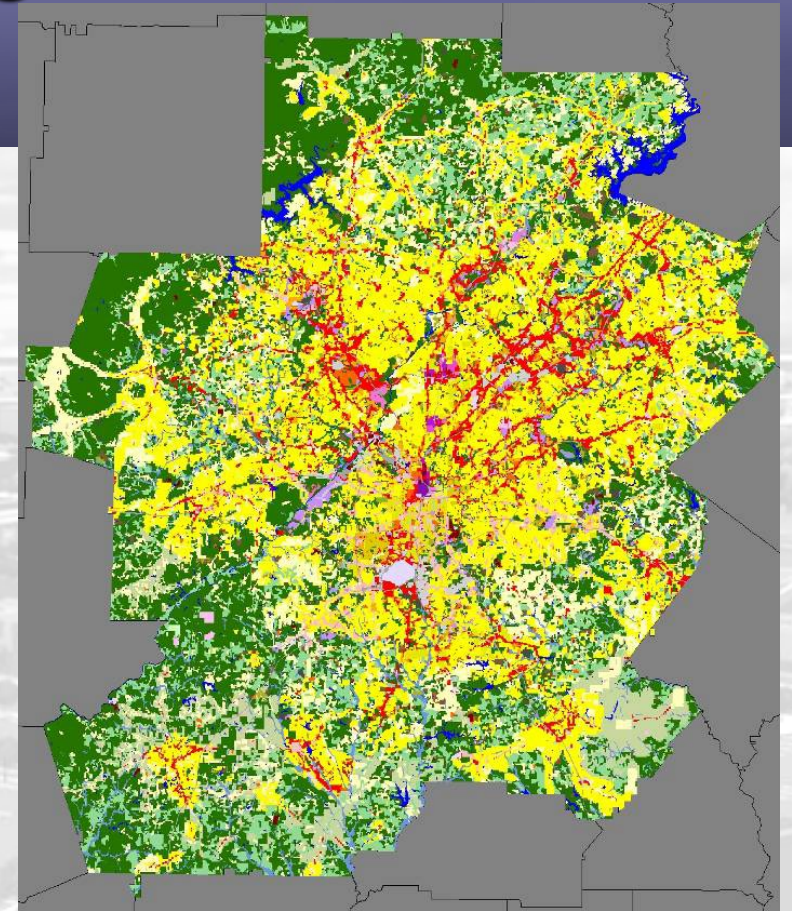




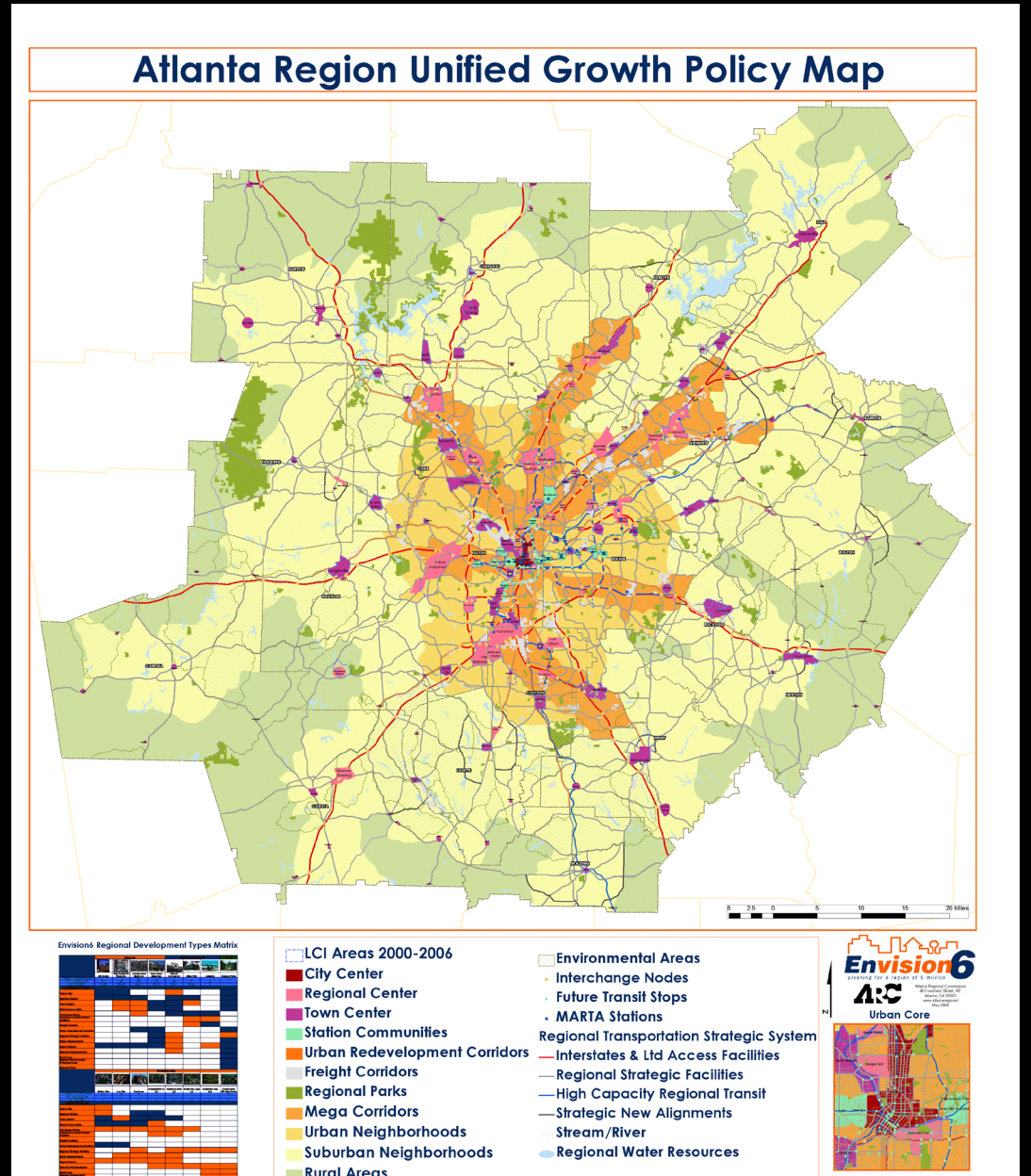
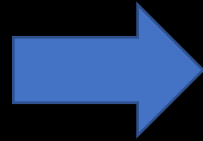
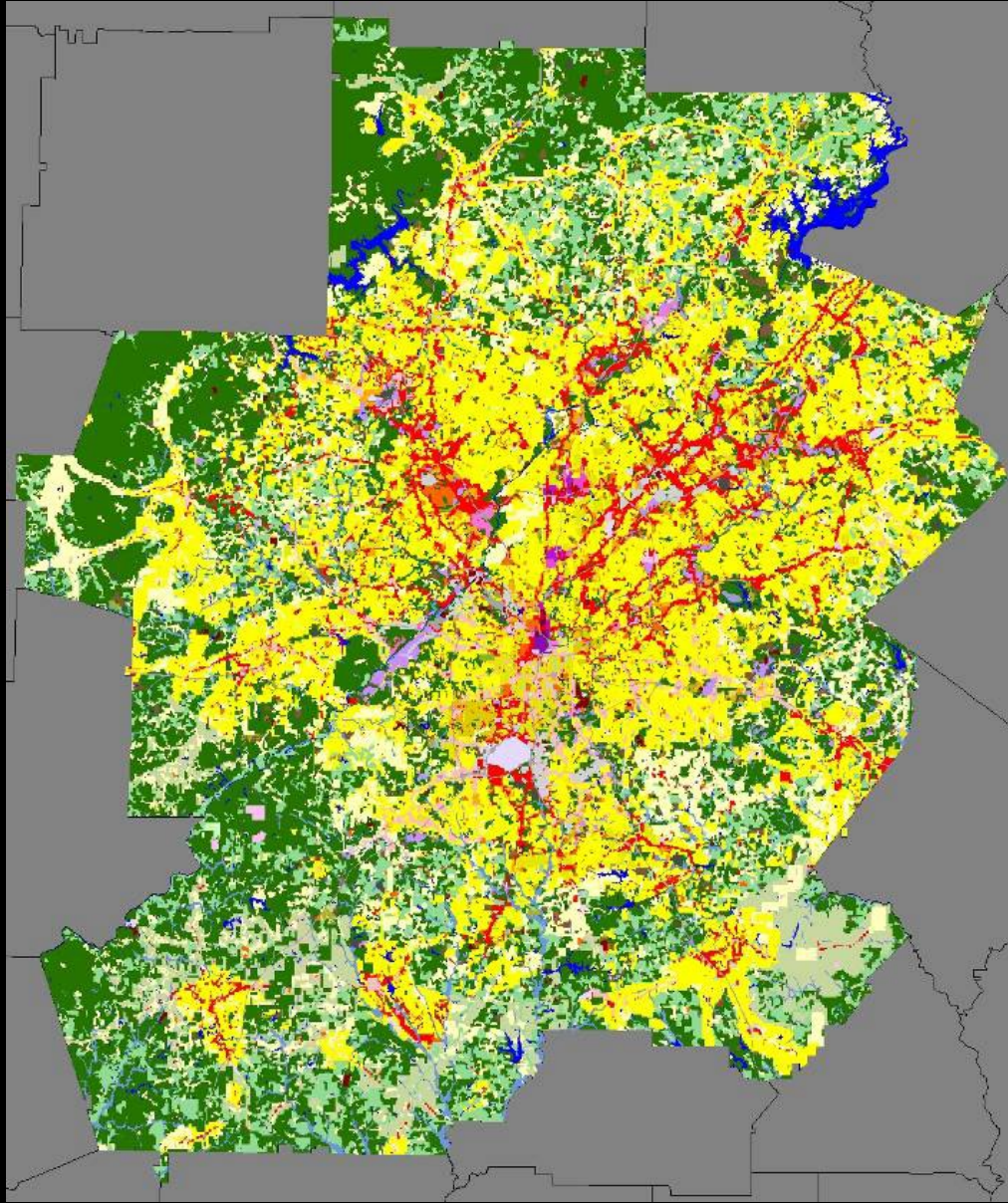
# Local Aspirations

## 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









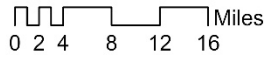
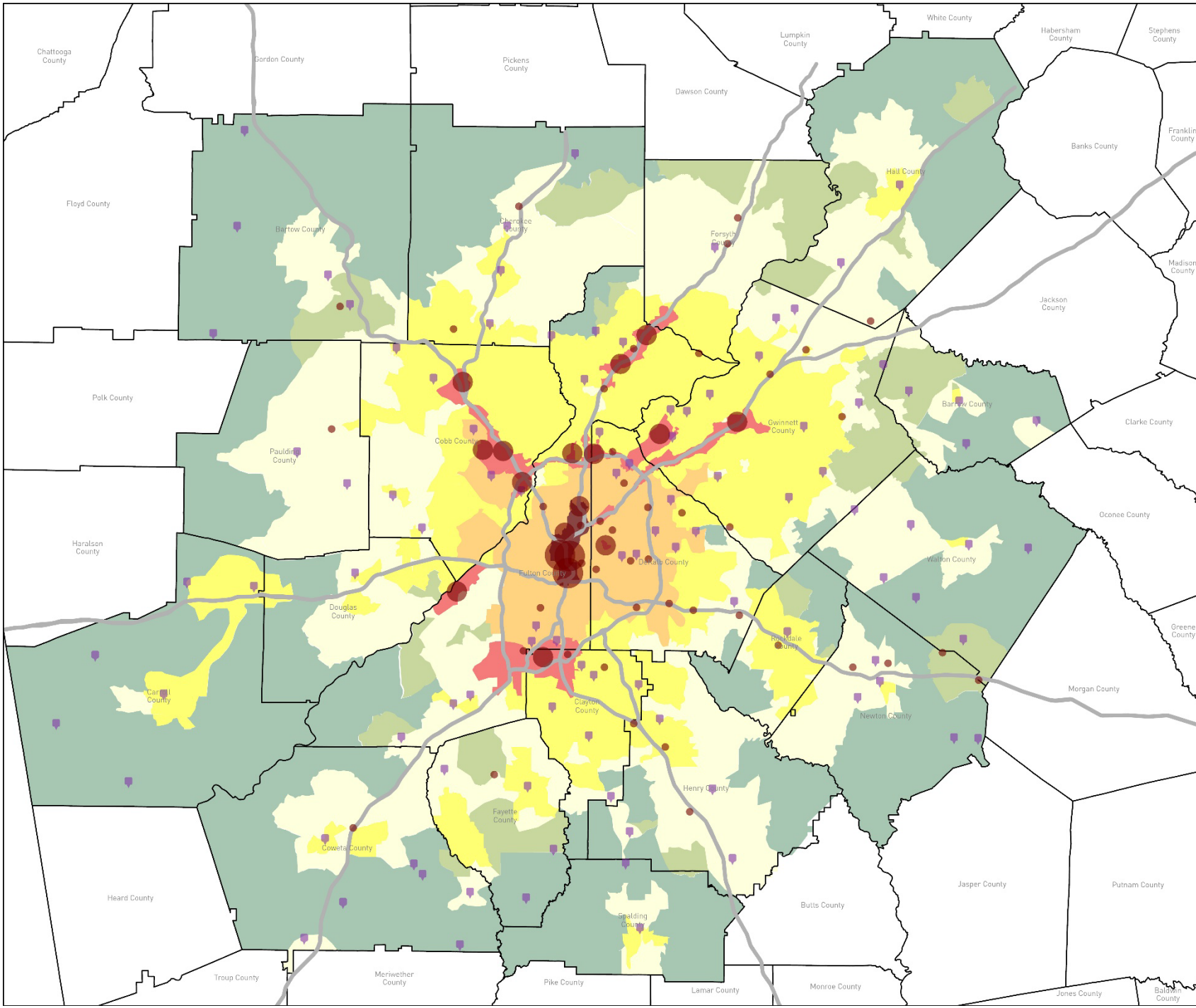
# 2021 Atlanta Region Unified Growth Policy Map

## Regional Areas

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

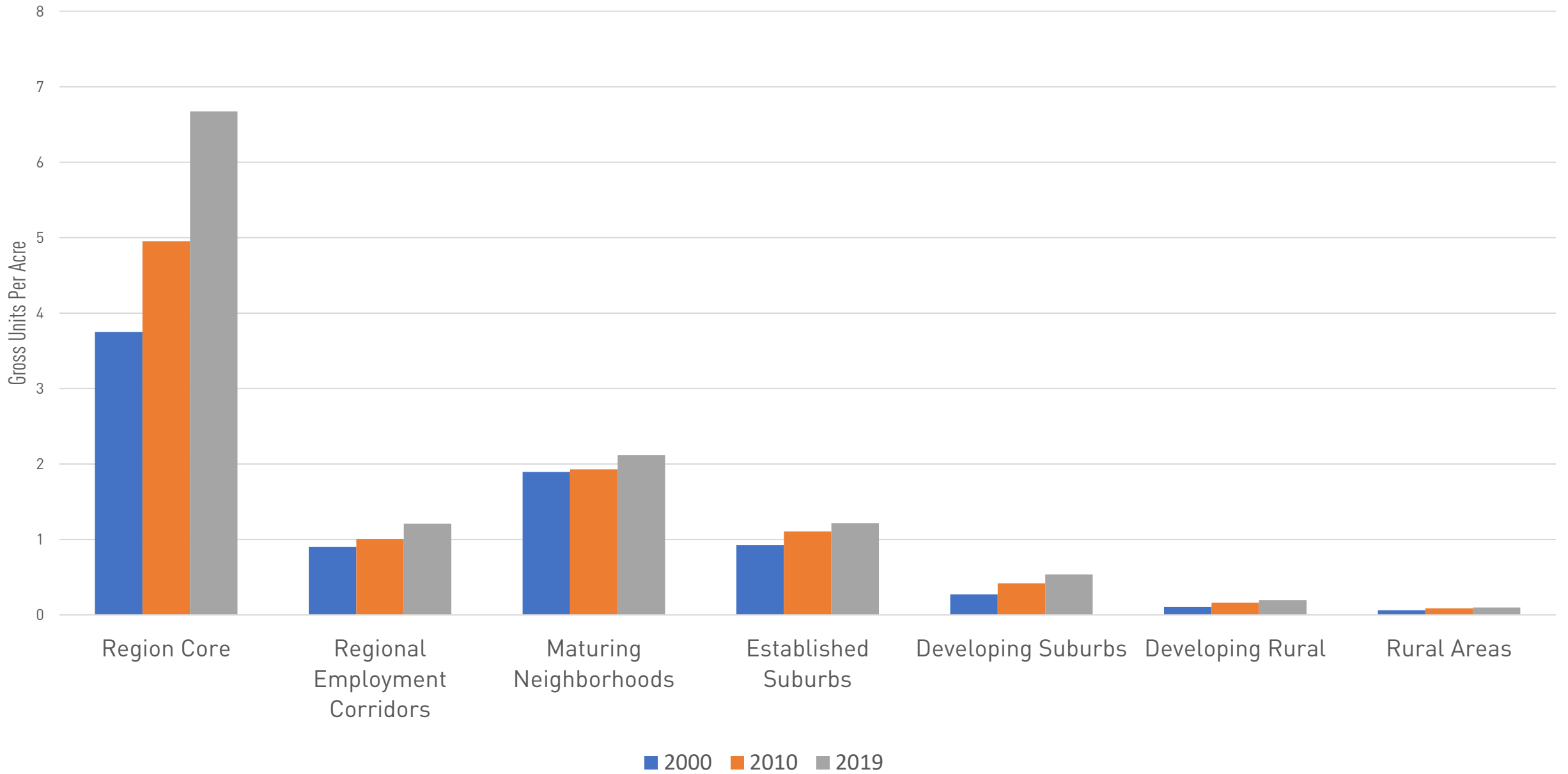
## Regional Centers

- Central City
- Regional Center
- Small Regional Center
- Town Centers

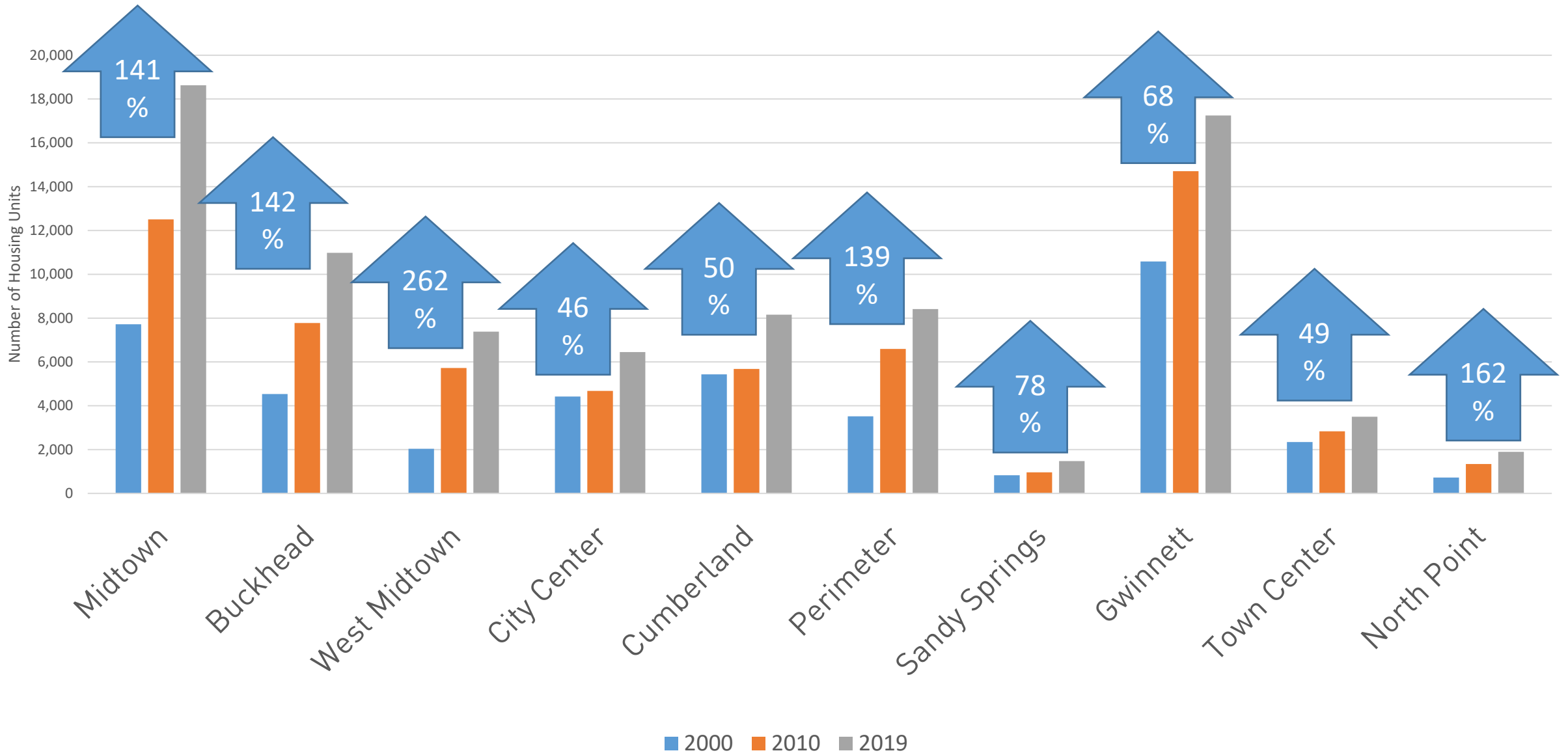




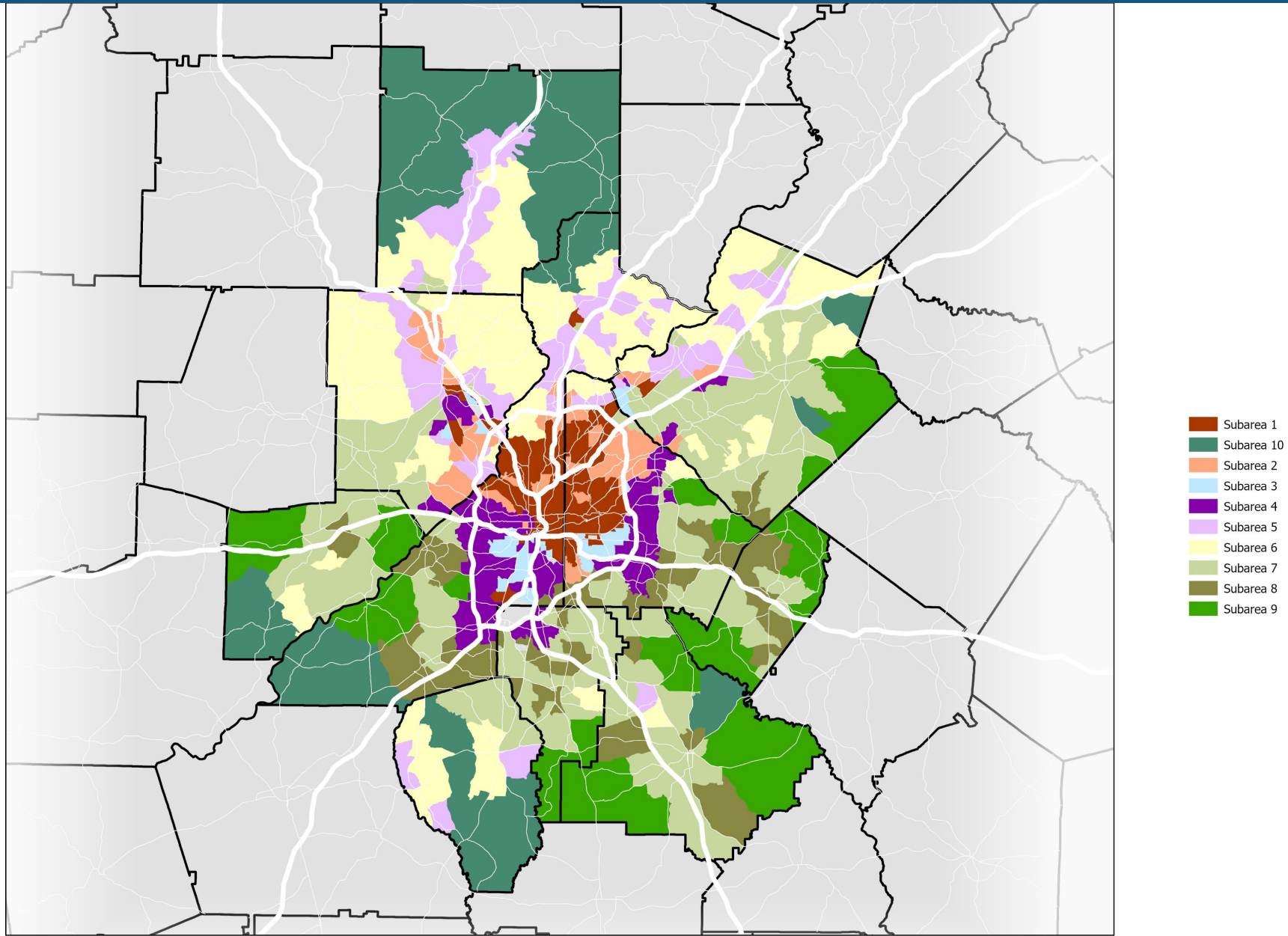
# Residential Density by UGPM Area Type



# Activity Center Density Change

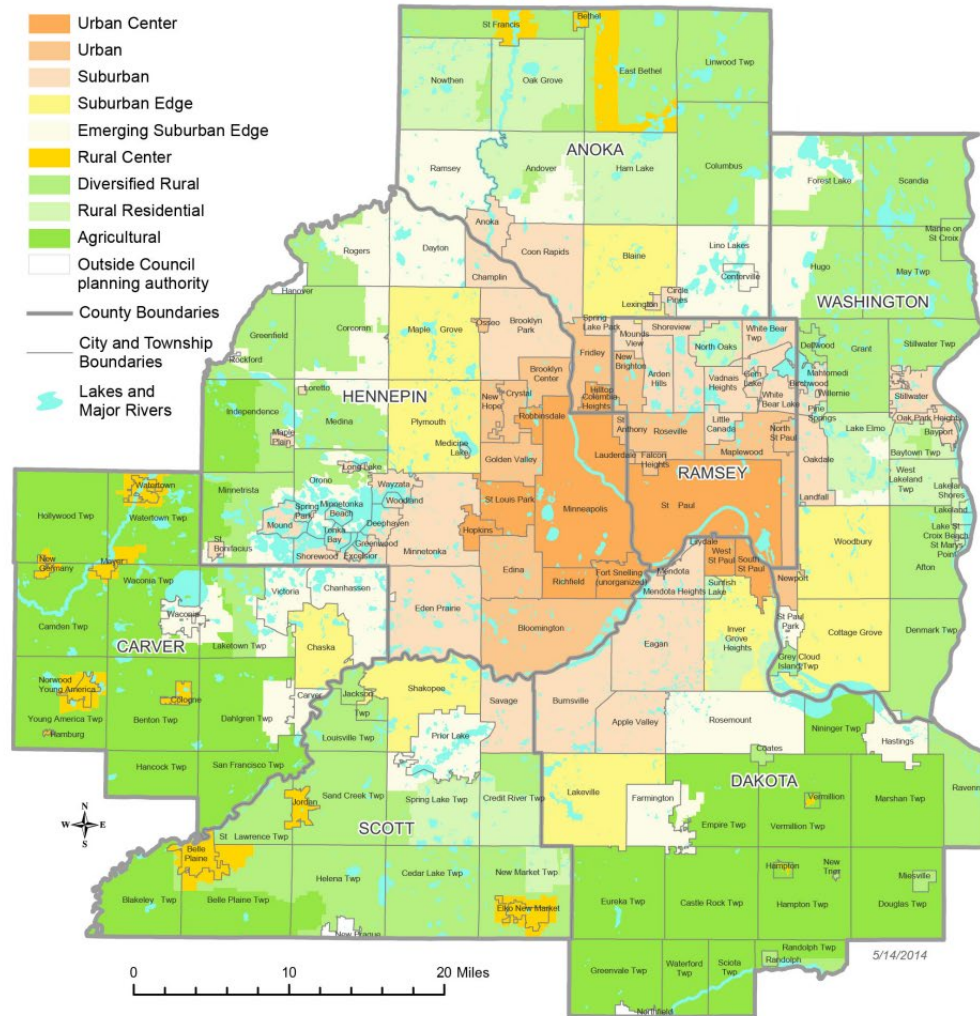


# Metro Atlanta Housing Strategy



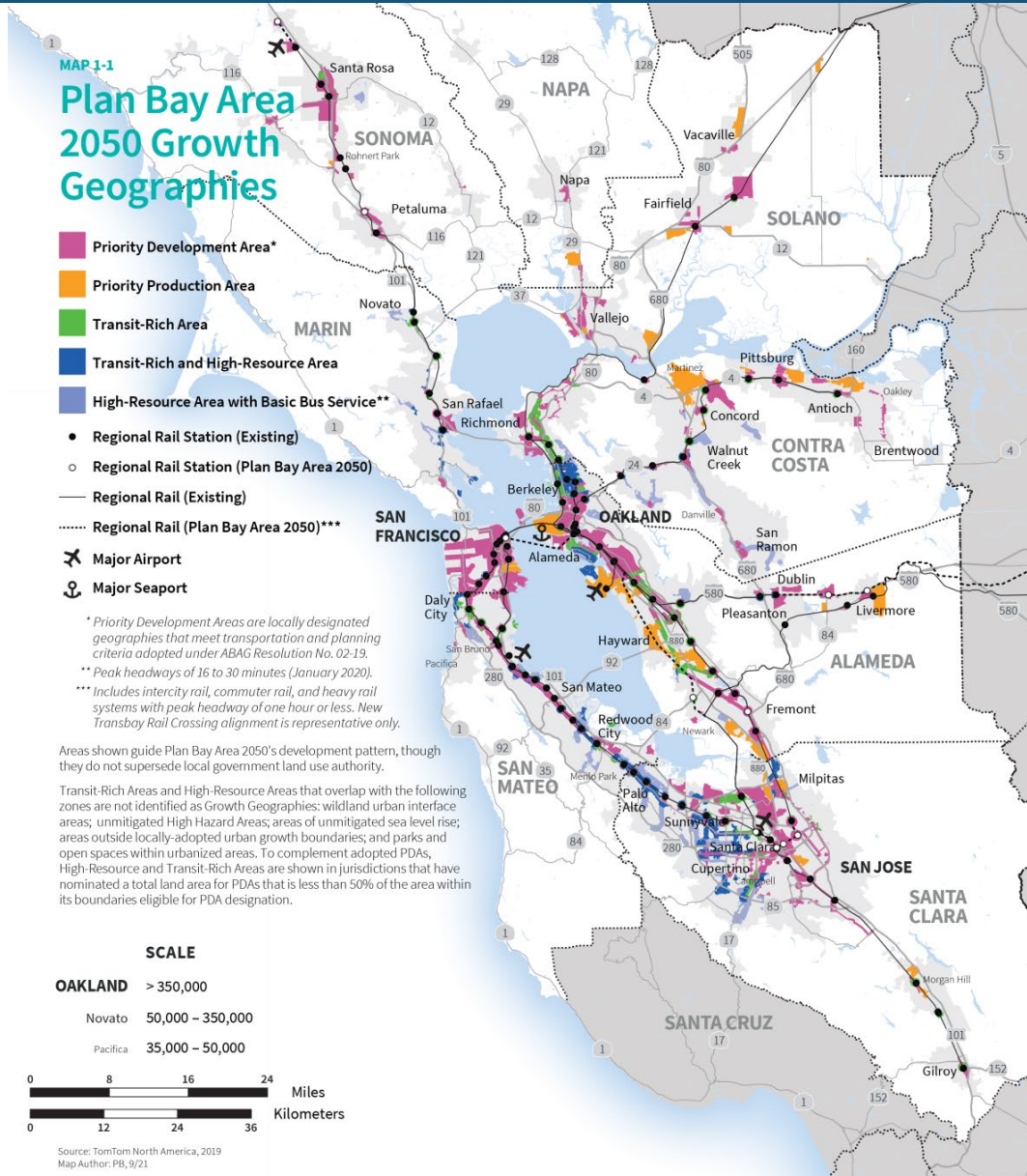


# Minneapolis



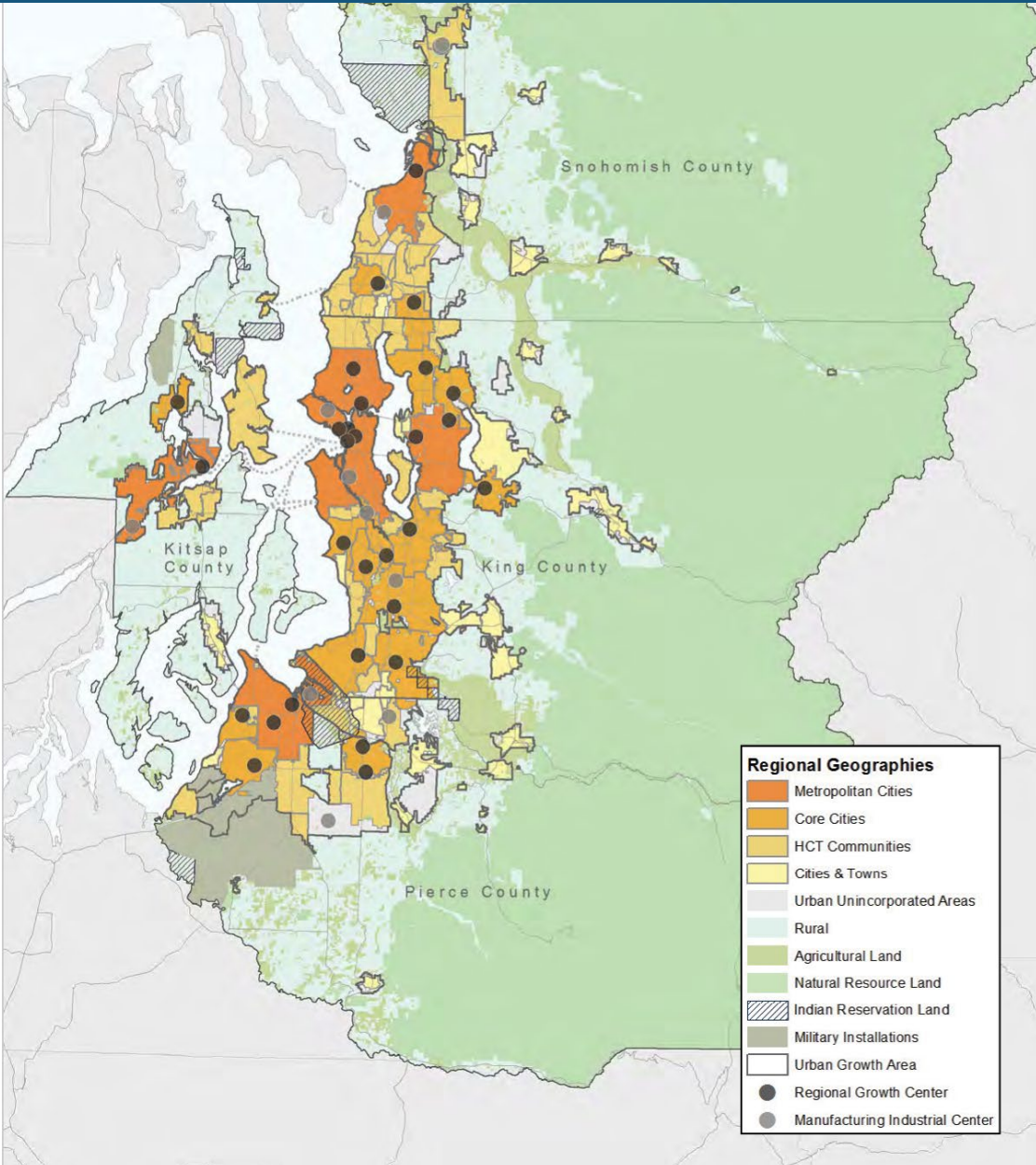
- Each local plan must identify what community classification and density standards from the regional plan

# 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](mailto: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:**



# 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





# 2021 Highlights

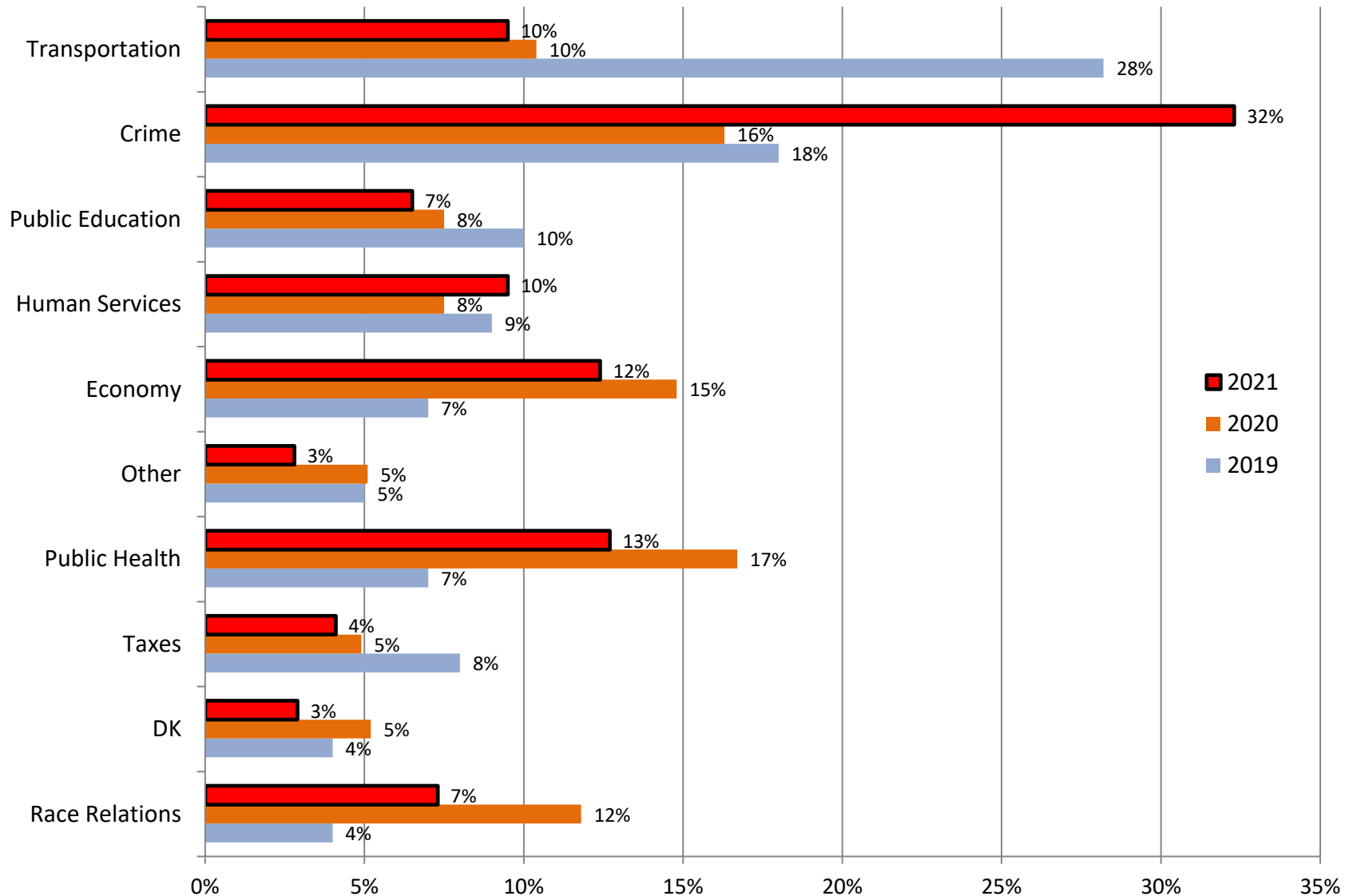
Crime was top of mind...everywhere and for (almost) everyone

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?: *The Last Few Years*



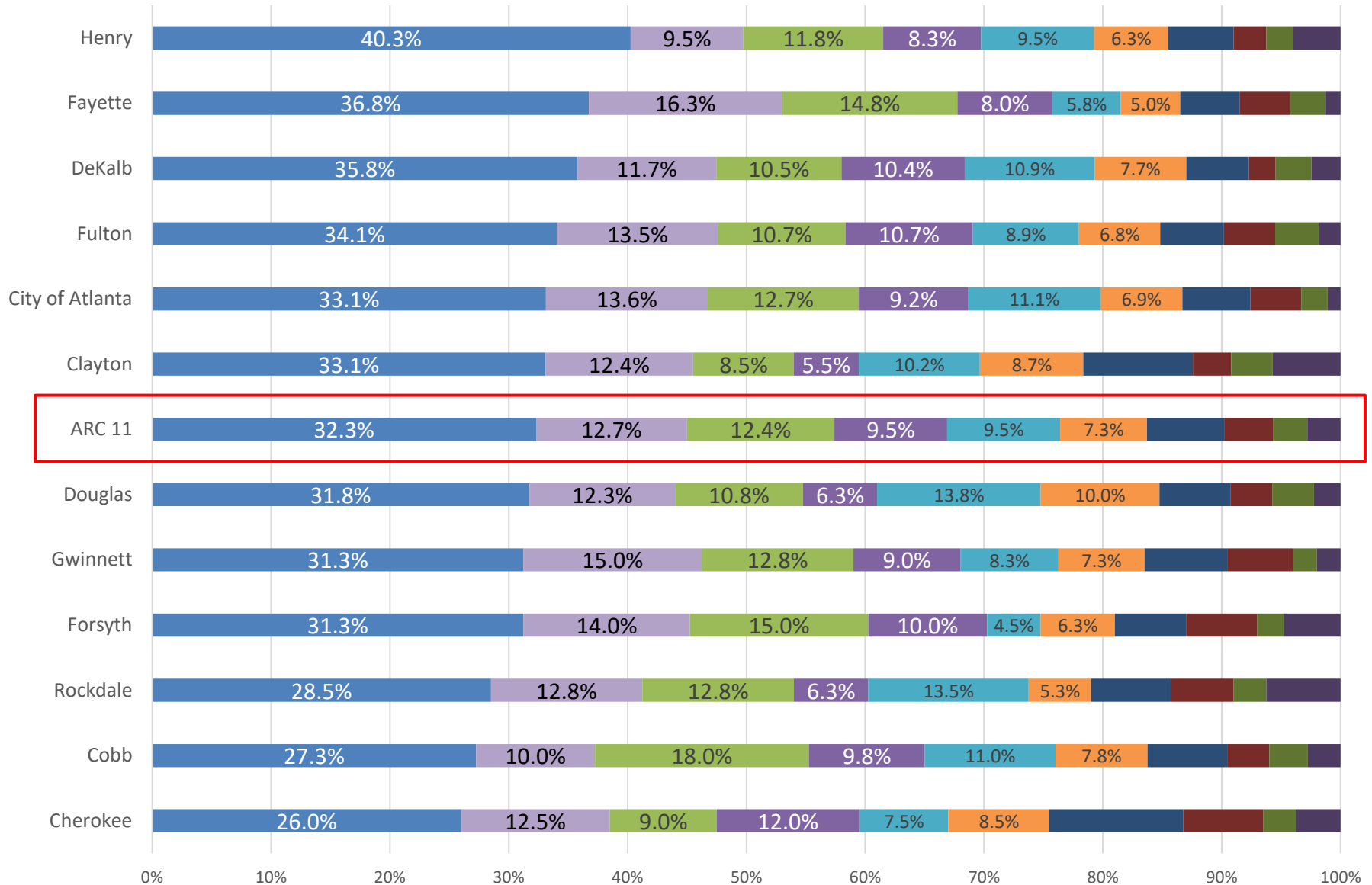
regional impact + local relevance

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# The Biggest Problem?: 2021 by County

■ Crime
■ Public Health
■ Economy
■ Transportation
■ Human Services
■ Race Relations
■ Public Education
■ Taxes
■ DK
■ Other



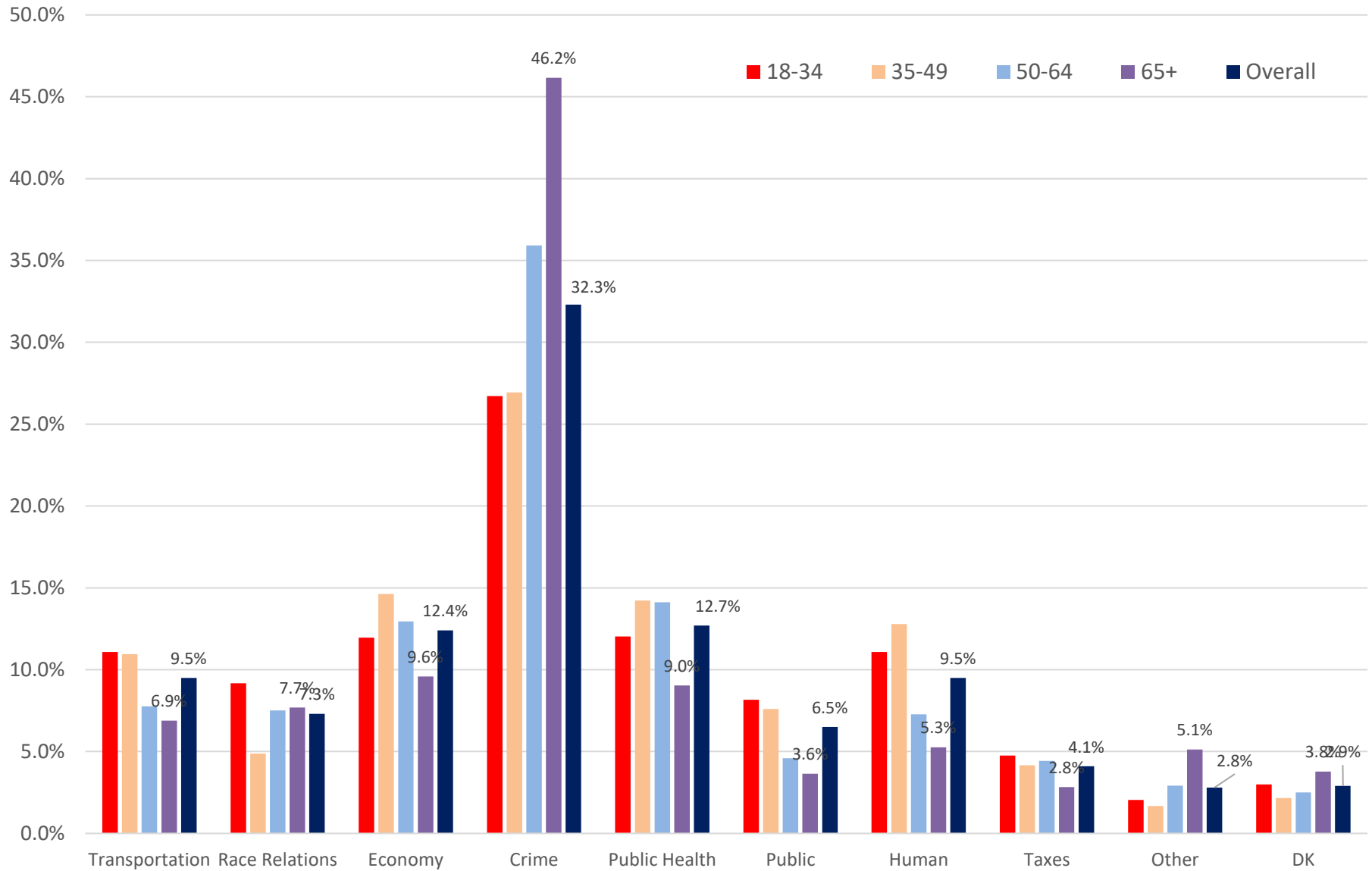
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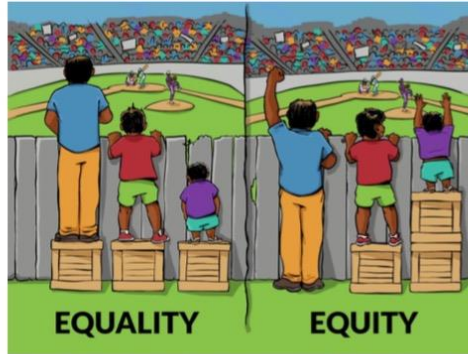
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# The Biggest Problem?: 2021 by Age Group



# Equity and Economy



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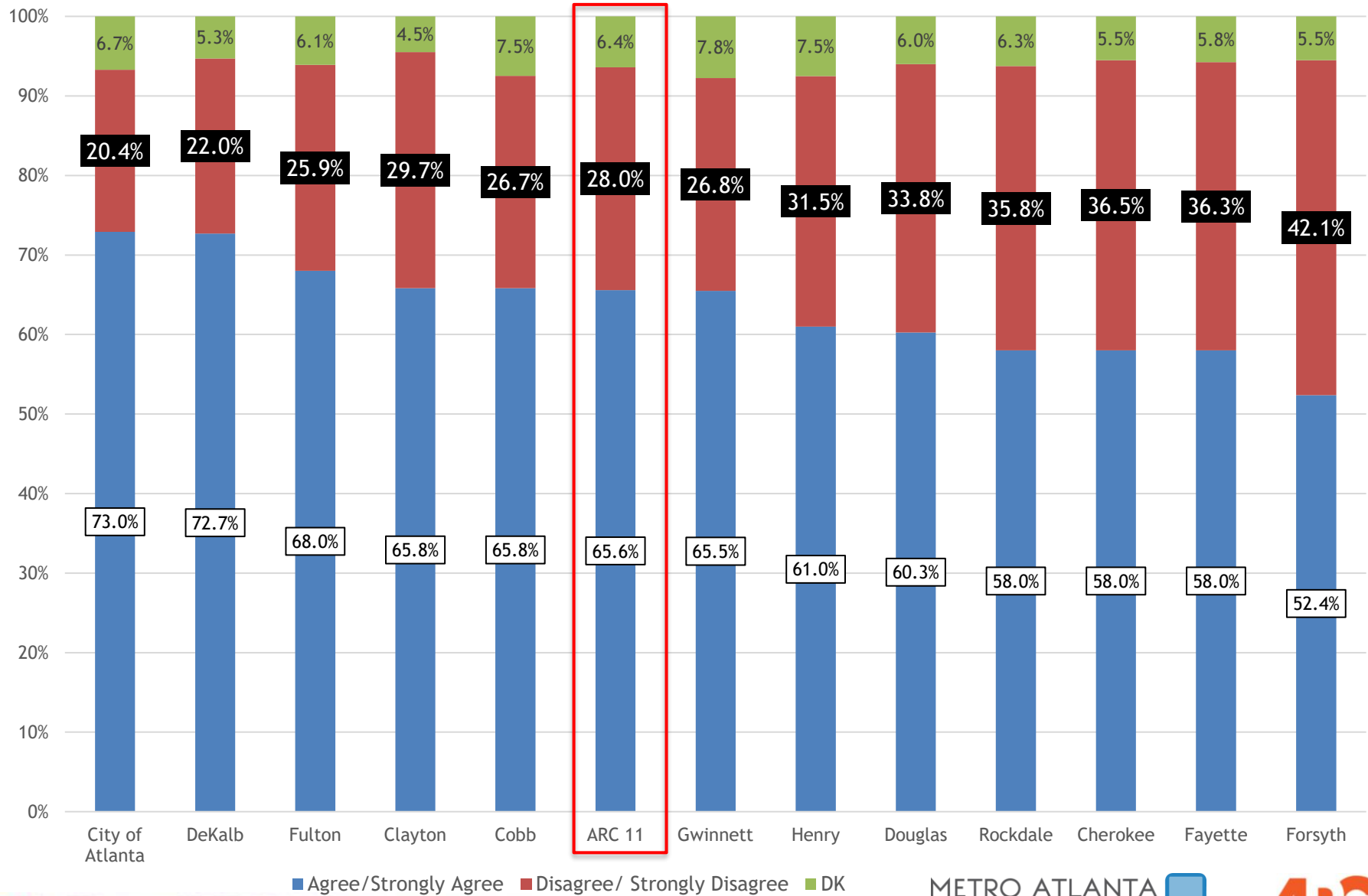


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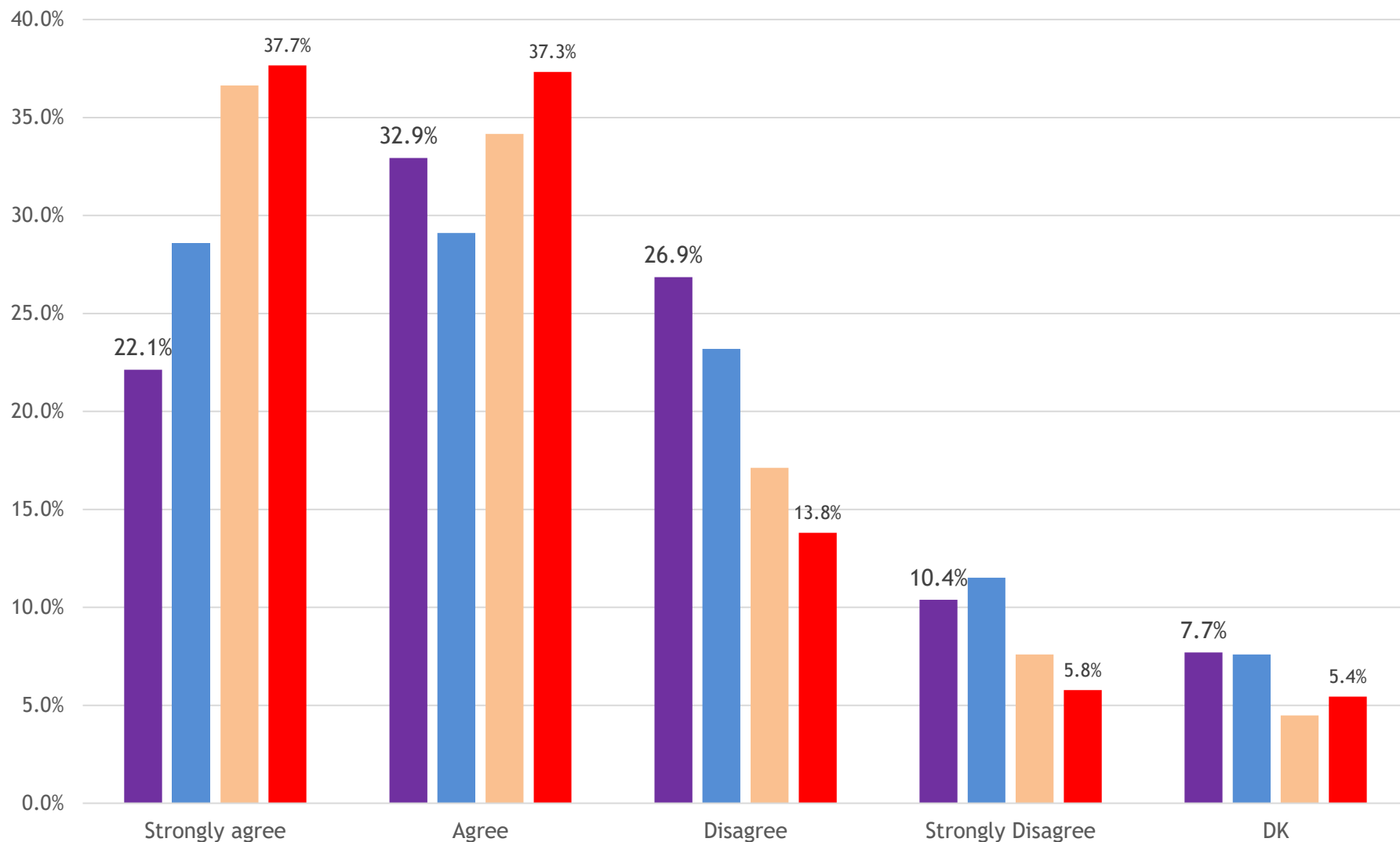
# "High levels of income inequality have a negative impact on the economy" by Area 2021





# "High levels of income inequality have a negative impact on the economy" by Age 2021

65+ 50-64 35-49 18-34

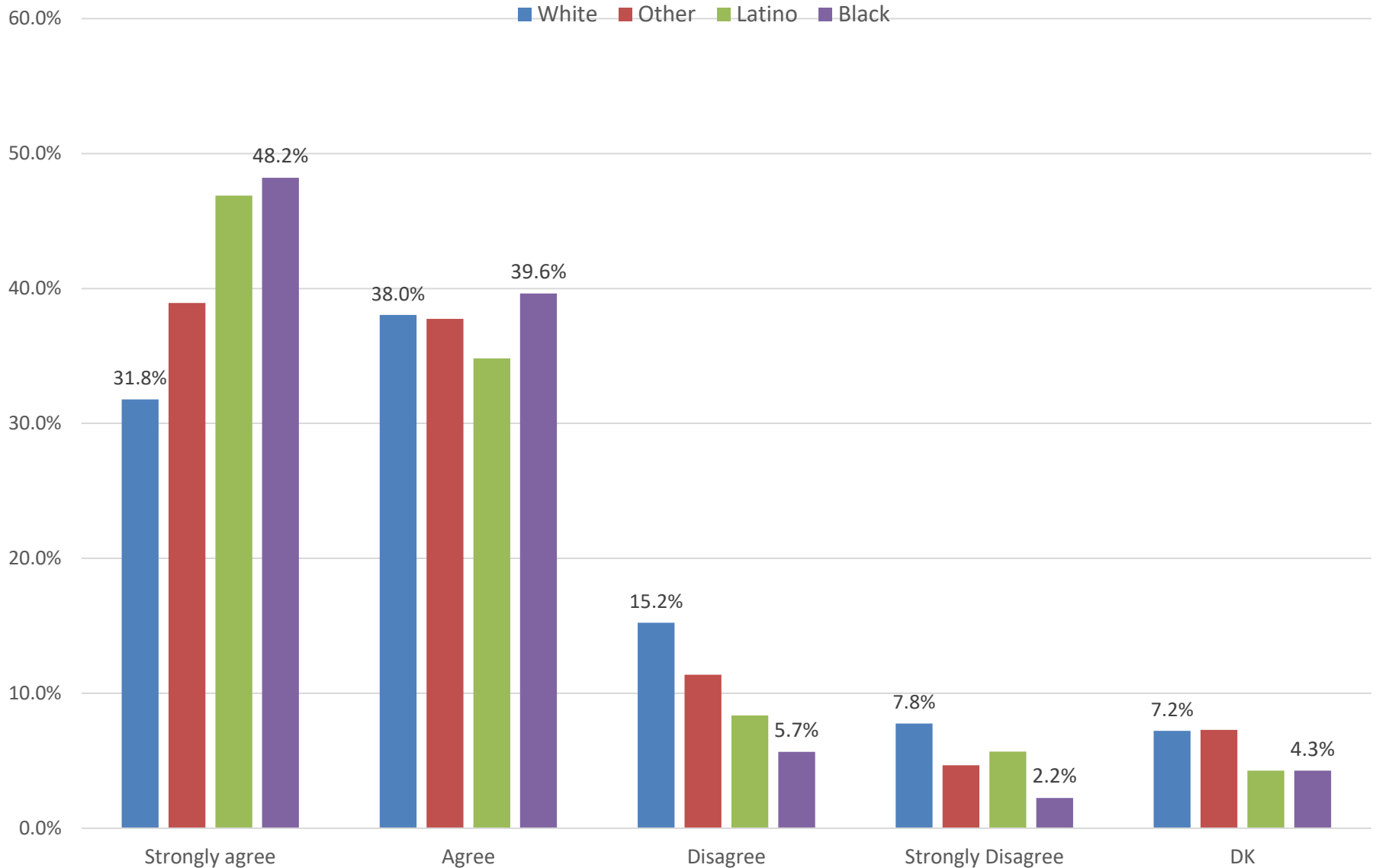


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# "High levels of income inequality have a negative impact on the economy" by Race 2021



# "Increasing the minimum wage would be good for the local economy" by Area 2021



■ Agree/Strongly Agree ■ Disagree/Strongly Disagree ■ DK



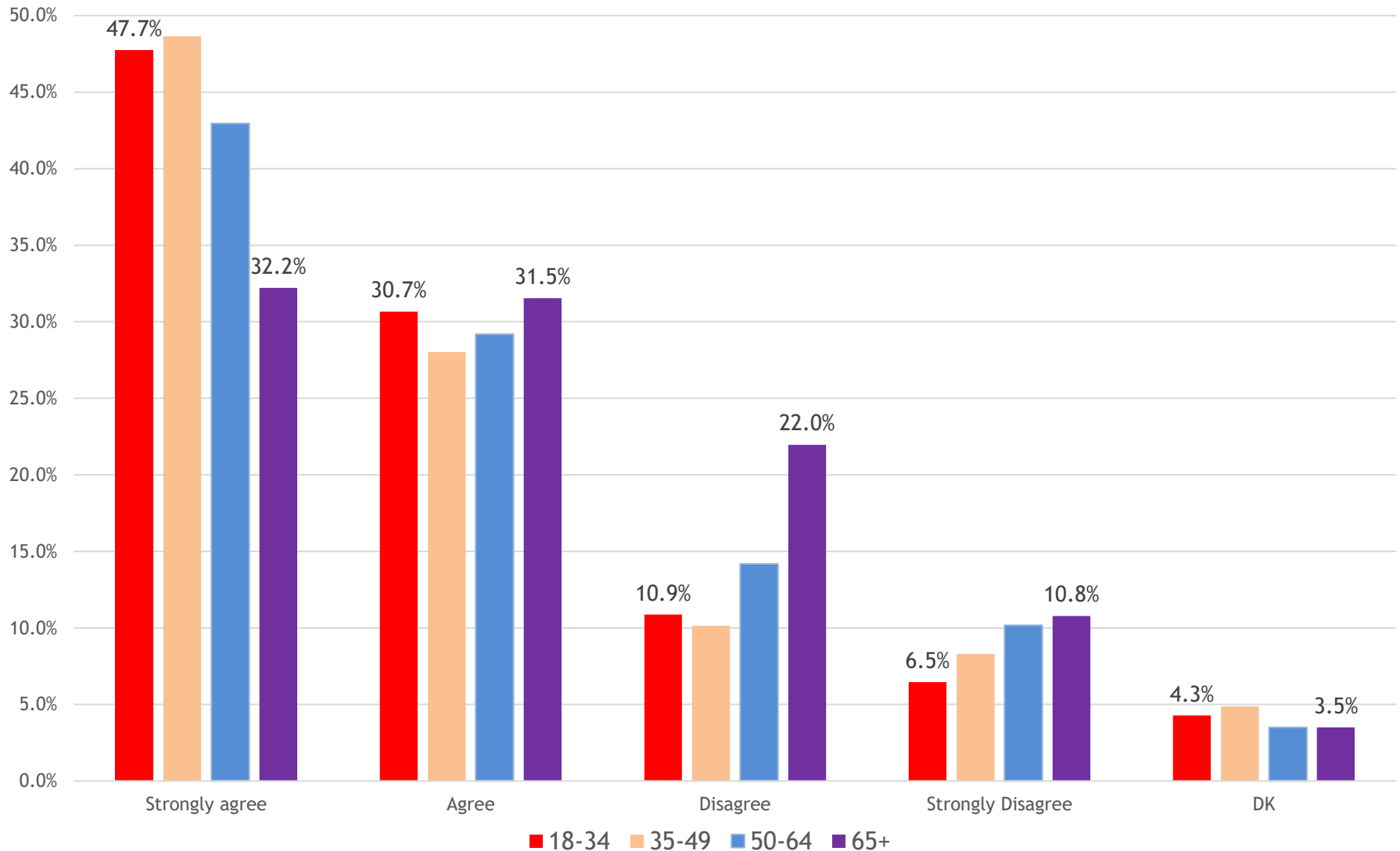
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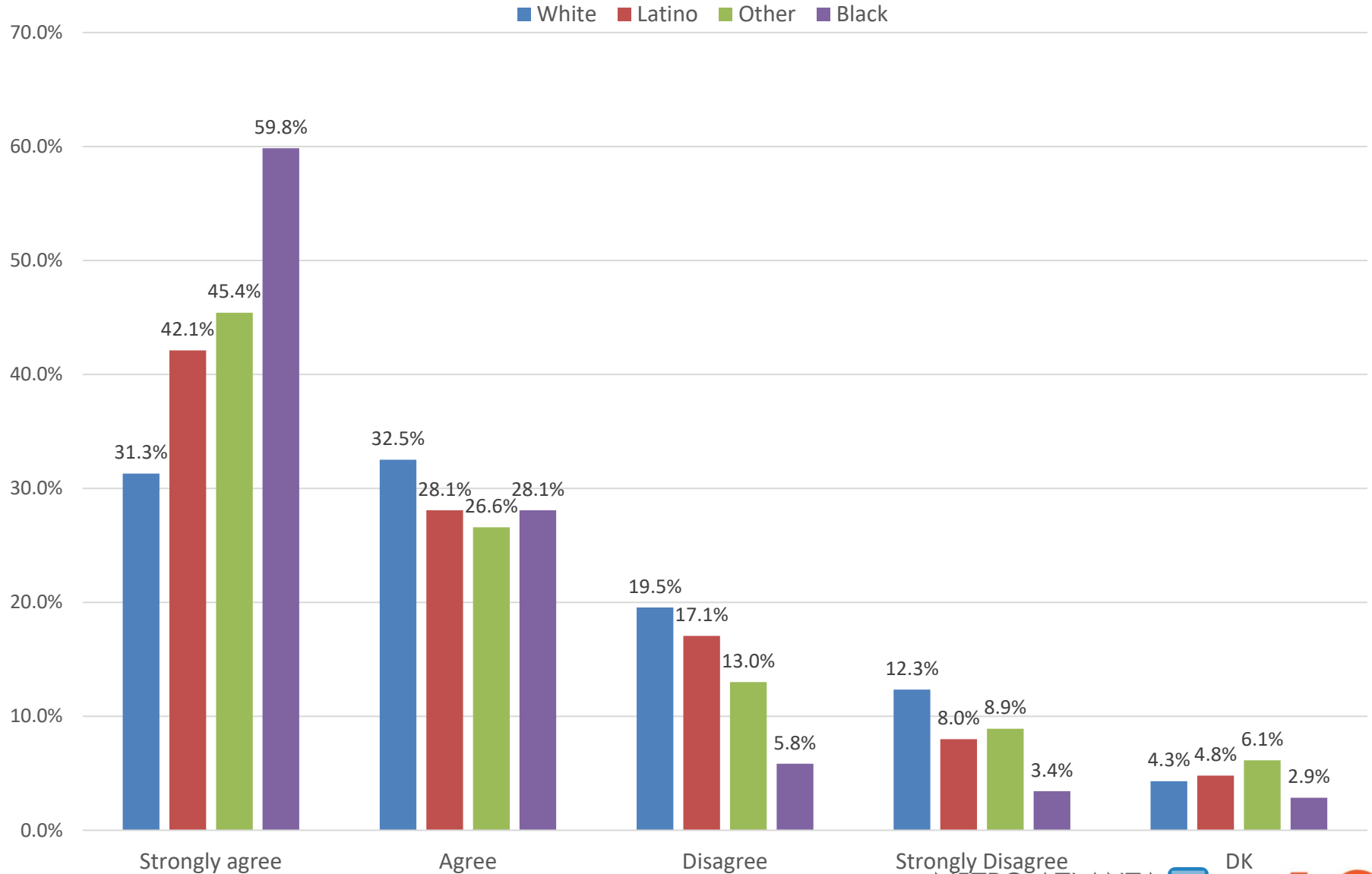
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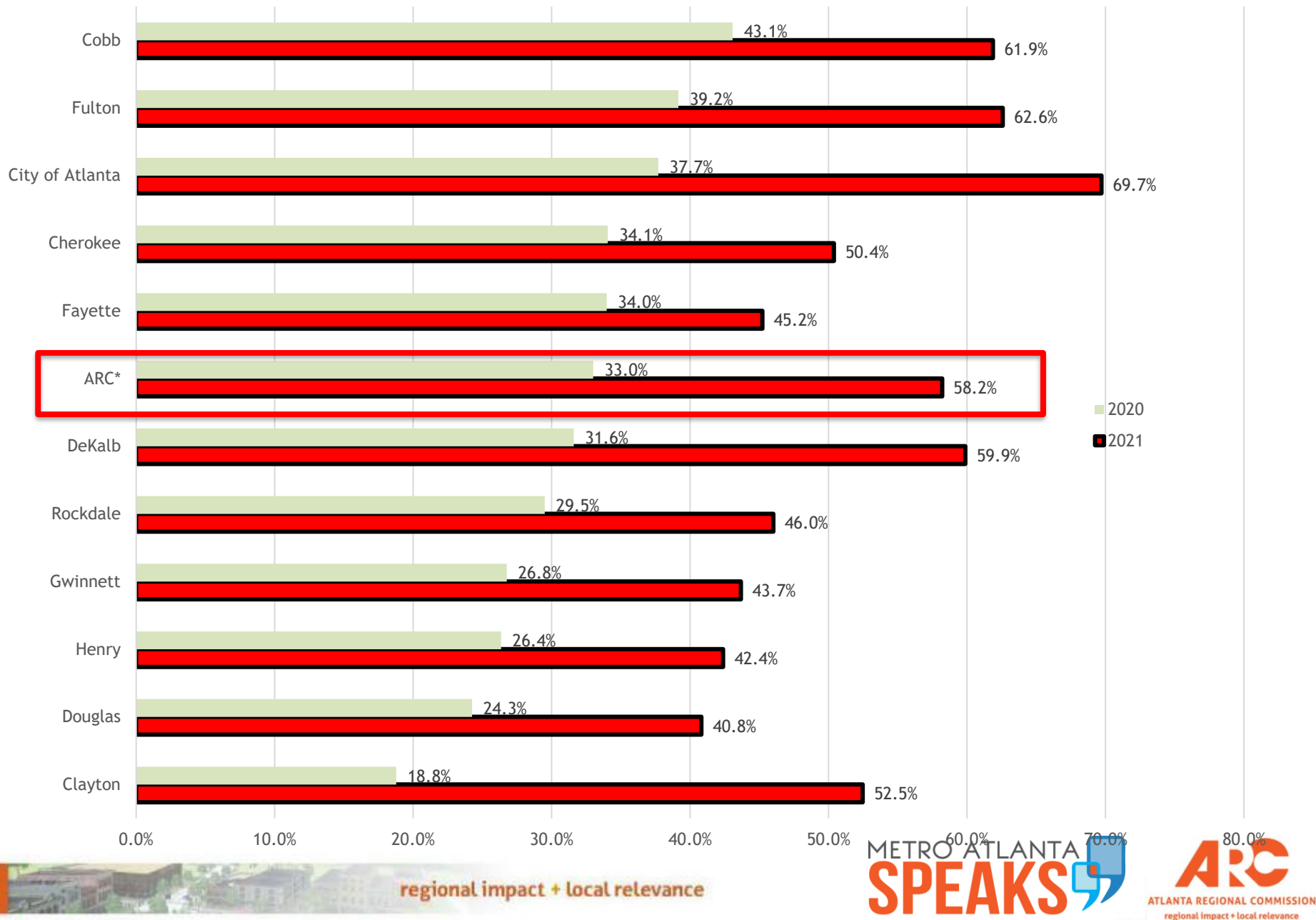
# "Increasing the minimum wage would be good for the local economy" by Age 2021



# "Increasing the minimum wage would be good for the local economy" by Race/ Ethnicity 2021



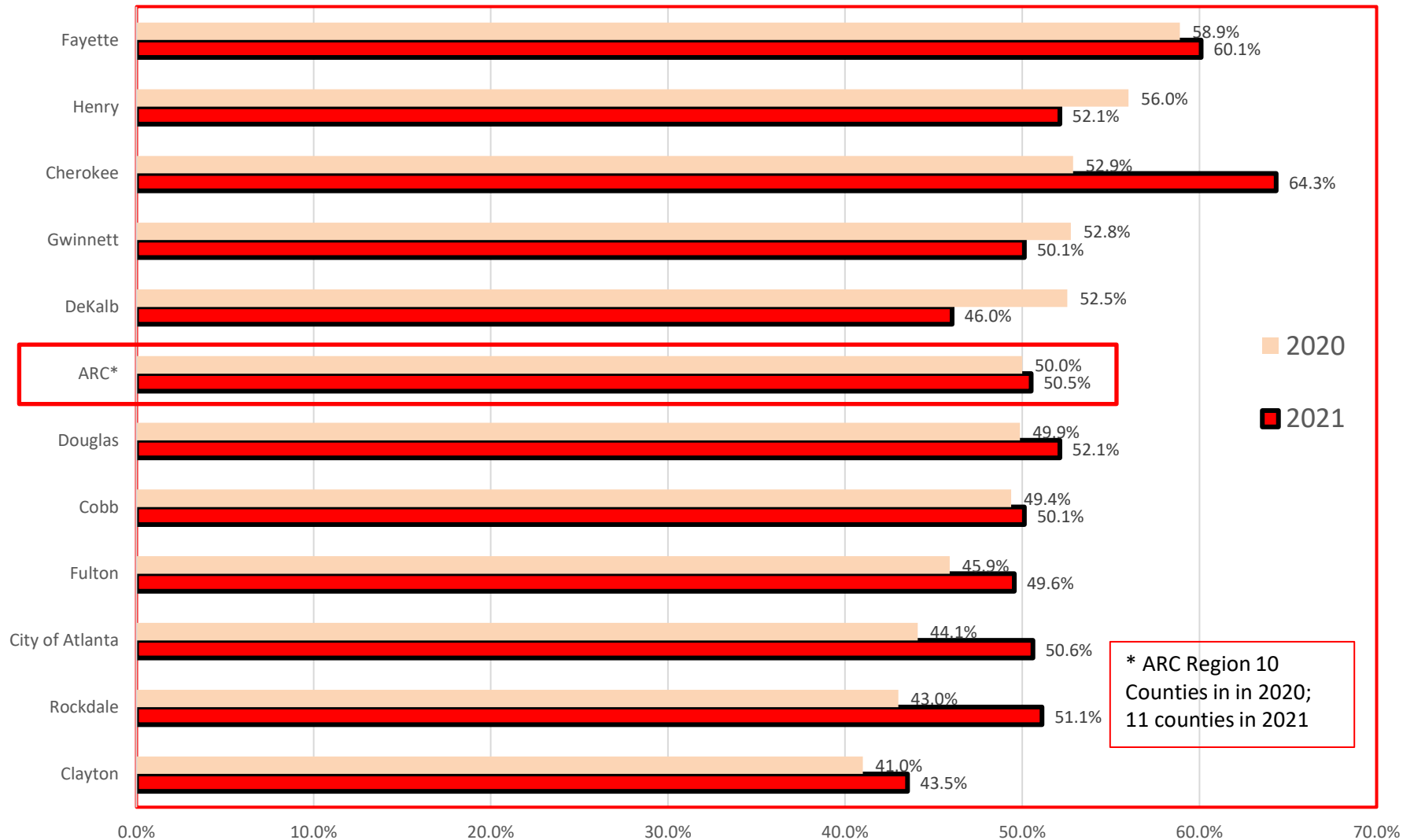
# Teleworking (Remote Occasionally or More) 2020 and 2021:



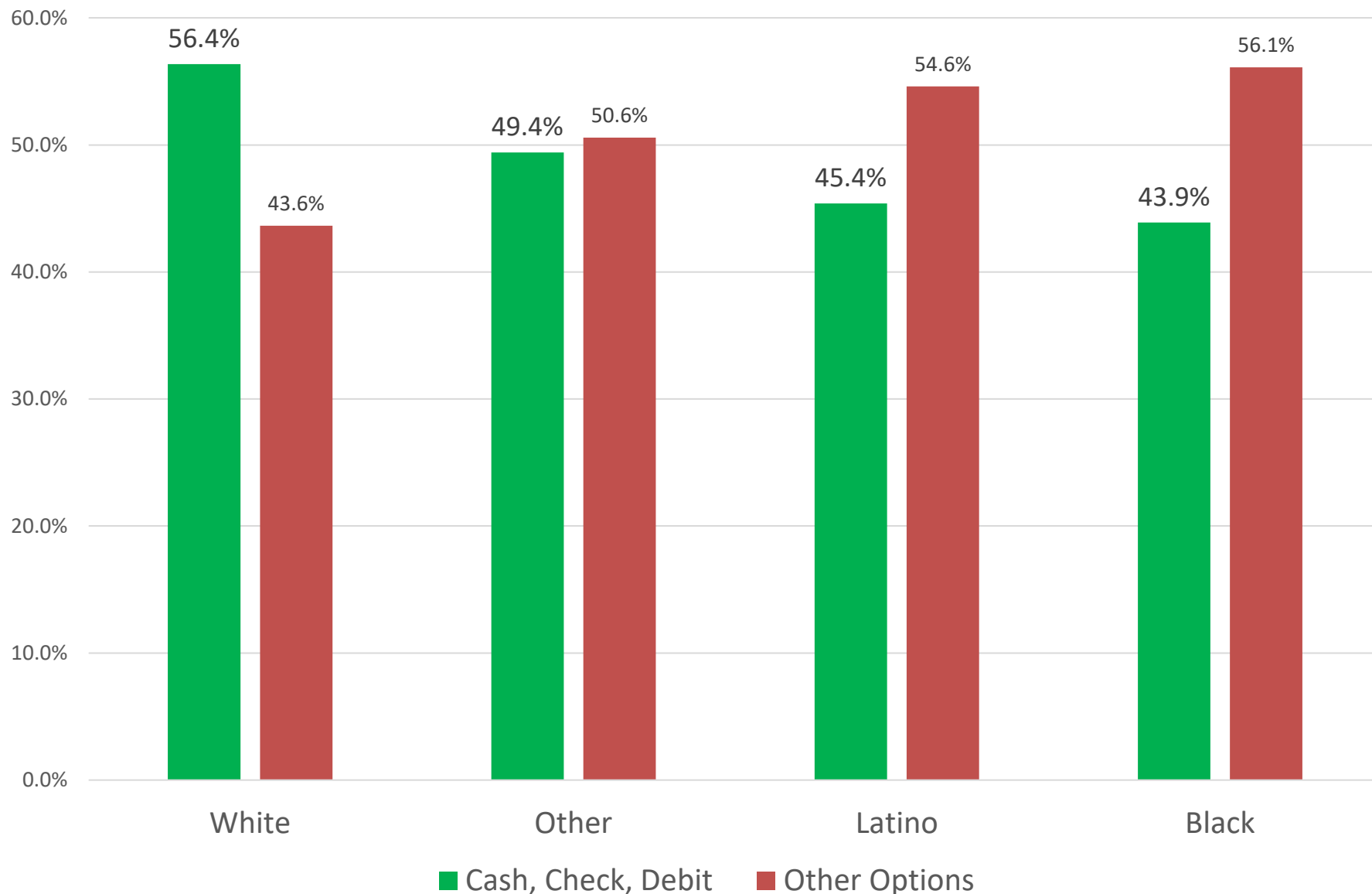


# Could Pay for a \$400 Emergency with Cash/ Debit...

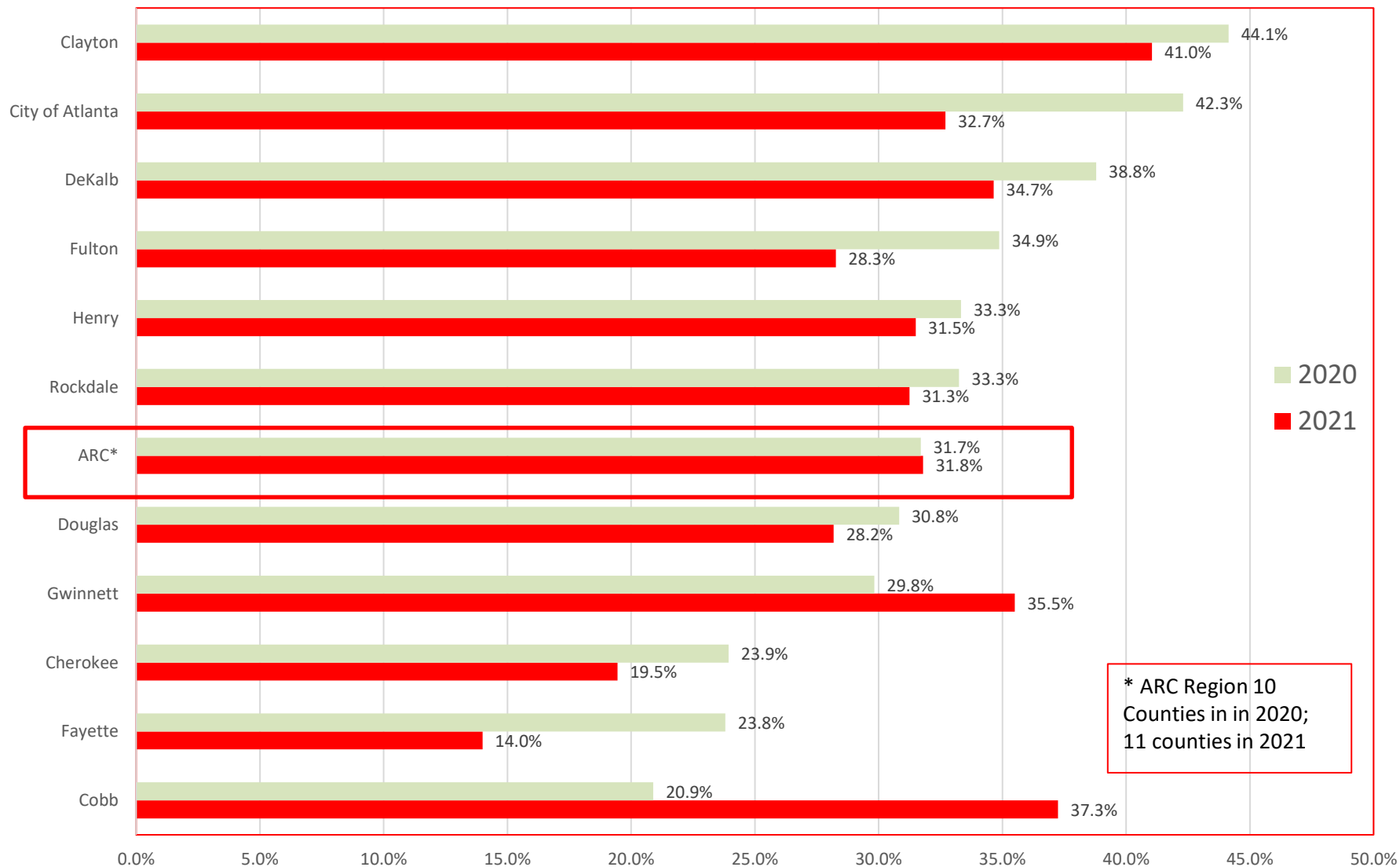
## Comparing 2021 to 2020



# Could Pay for a \$400 Emergency with...by Race/Ethnicity: 2021



## Share Less Than Confident in Ability to Pay Next Mortgage or Rent Payment...2020 and 2021



# Confidence in Ability to Pay Mortgage or Rent...By Race/ Ethnicity: 2021

■ Less than Very Confident ■ Very confident ■ Other\*



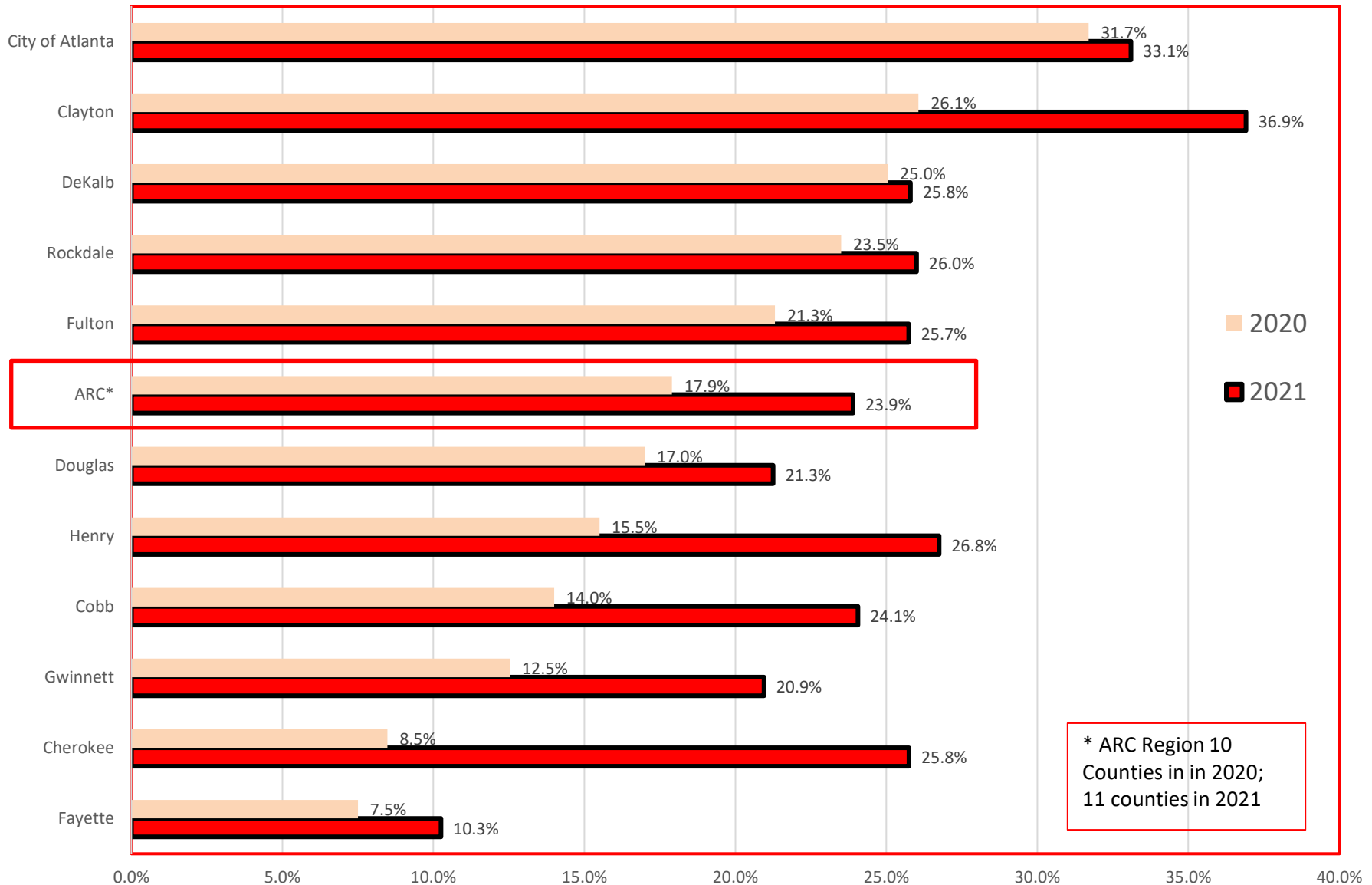
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# Received Food from a Food Bank: Comparing 2020 and 2021



\* ARC Region 10  
Counties in in 2020;  
11 counties in 2021



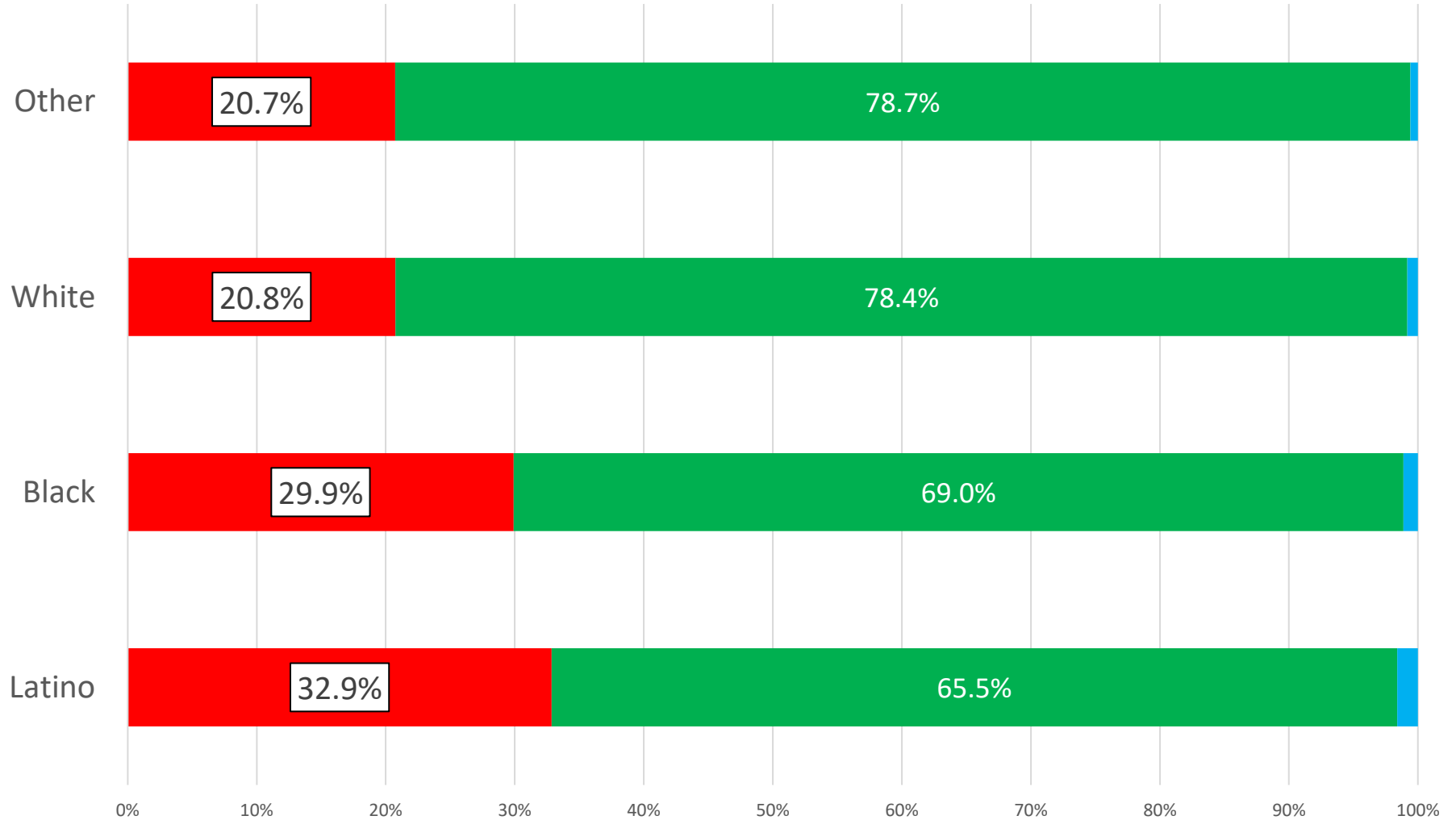
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# Received Food from a Food Bank: By Race/ Ethnicity, 2021

■ Yes ■ No ■ DK

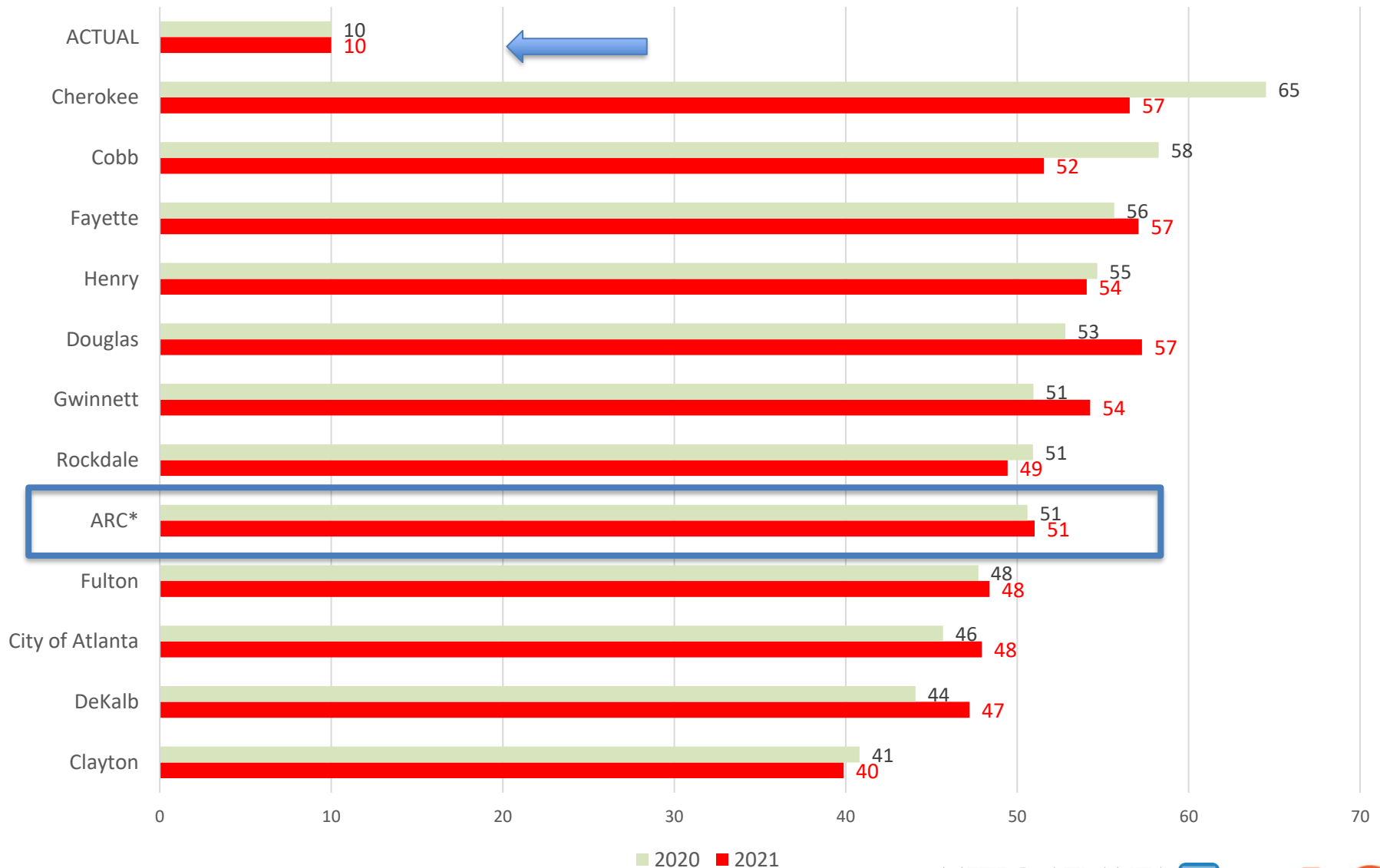


# Question: For All Respondents...

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 Comparing 2020 and 2021 MAS Responses



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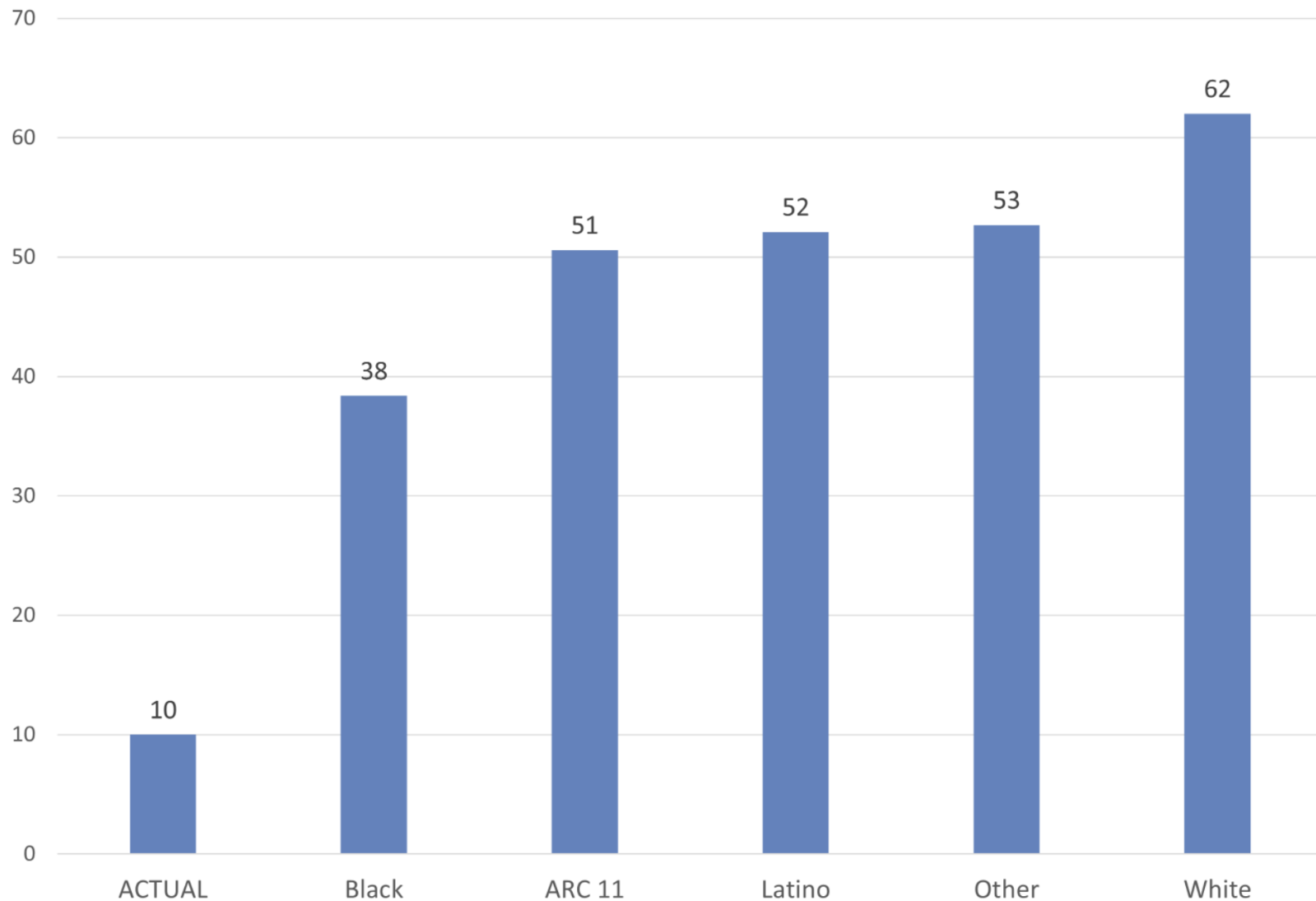
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# Ratio of Black Wealth to White Wealth, By Race

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

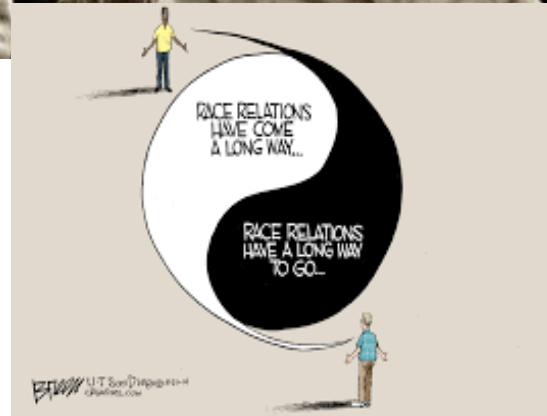
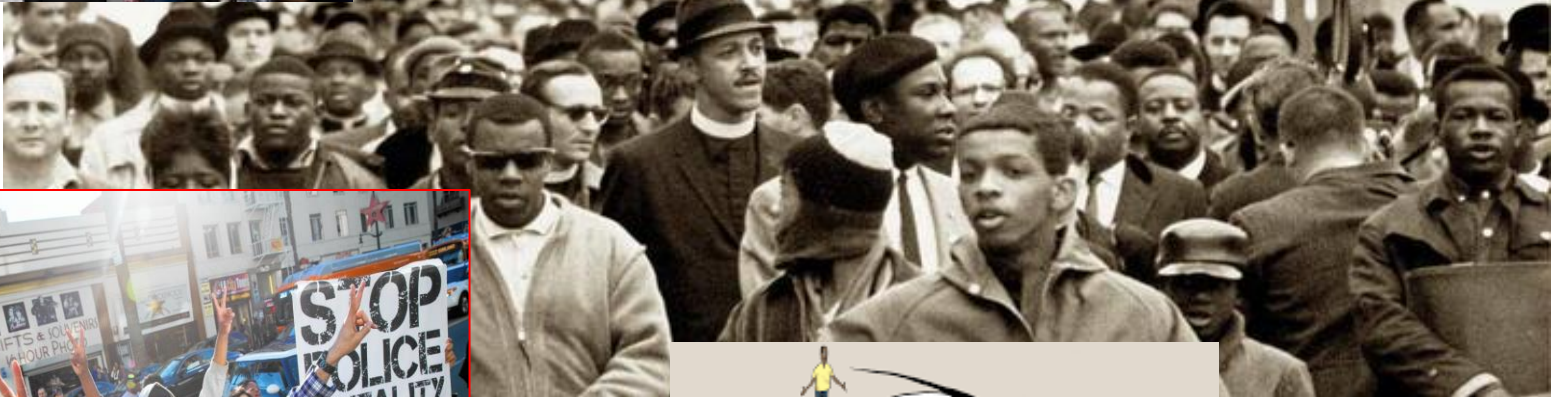


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# Equity and Race

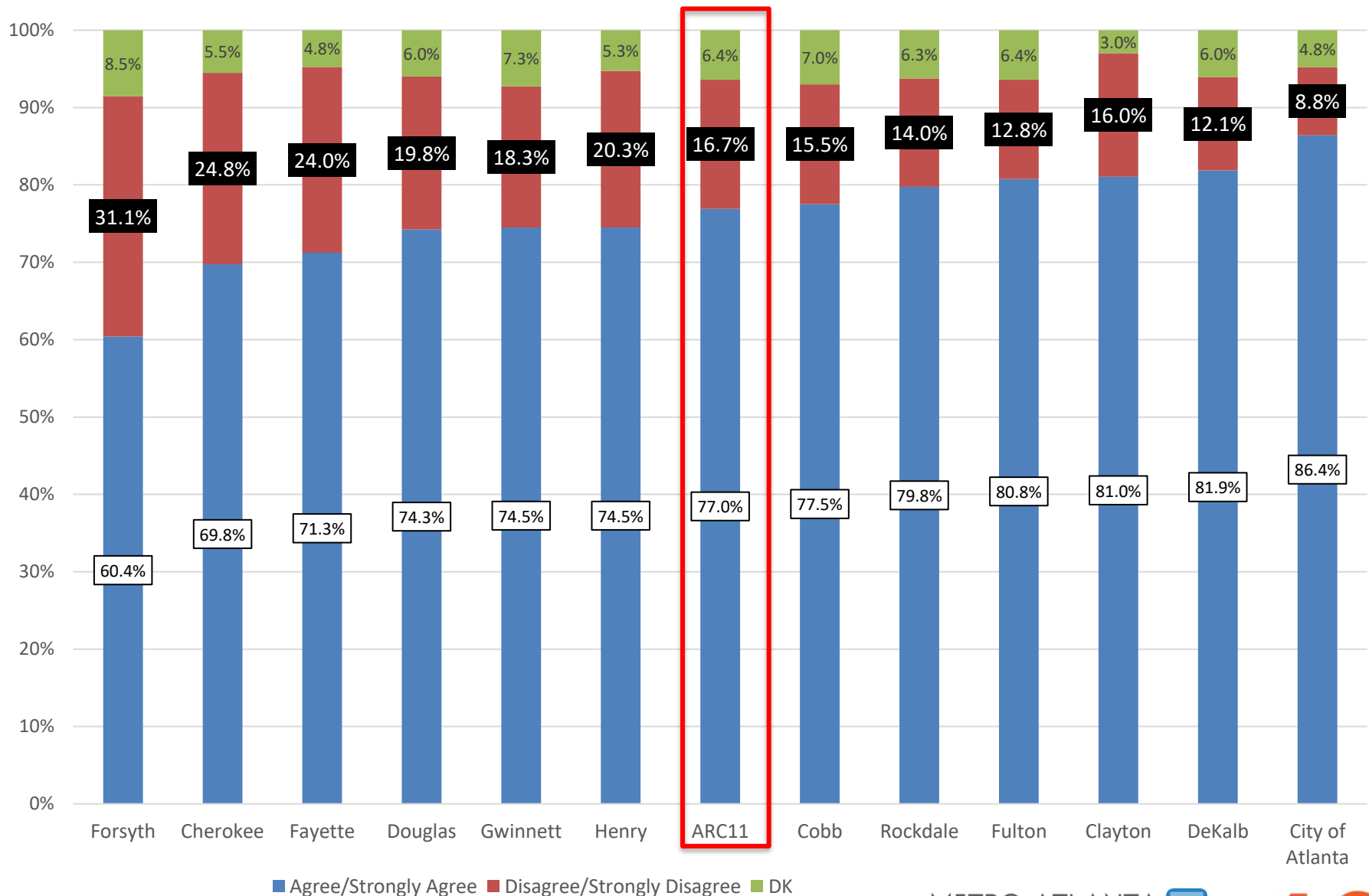


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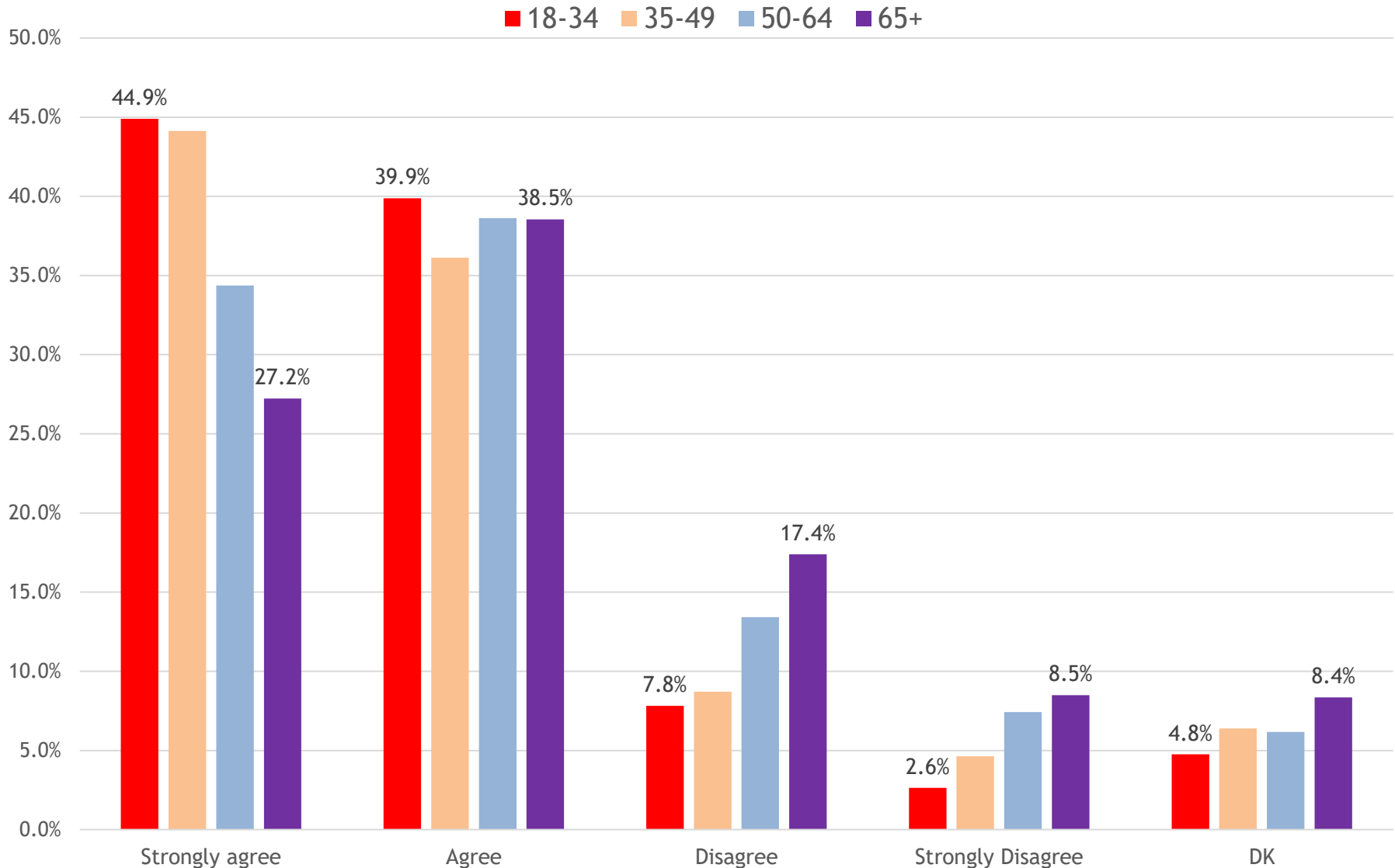
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# “Ensuring racial equity is essential to maximizing economic growth in our region“ by Area: 2021

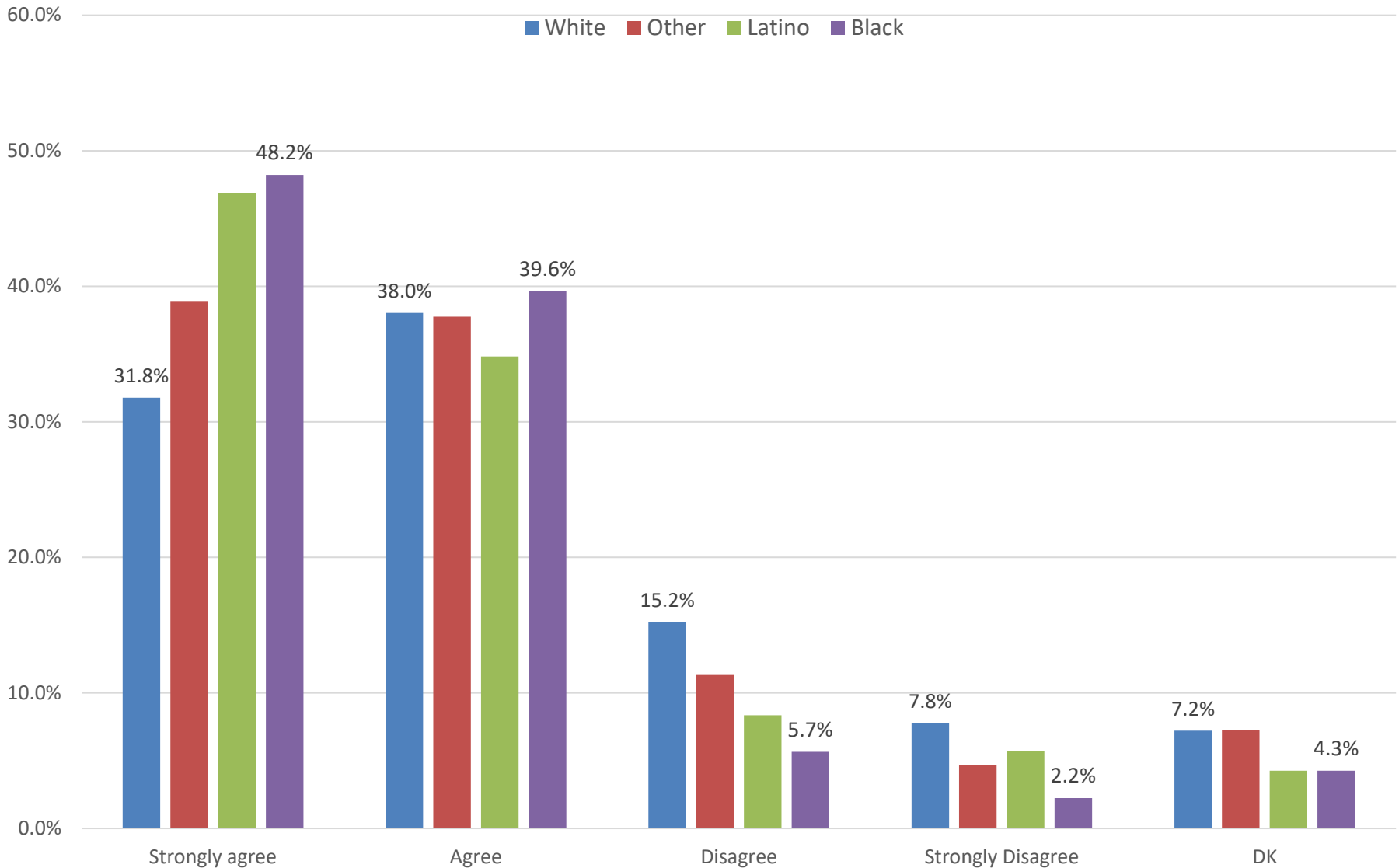


# “Ensuring racial equity is essential to maximizing economic growth in our region“ by Age: 2021

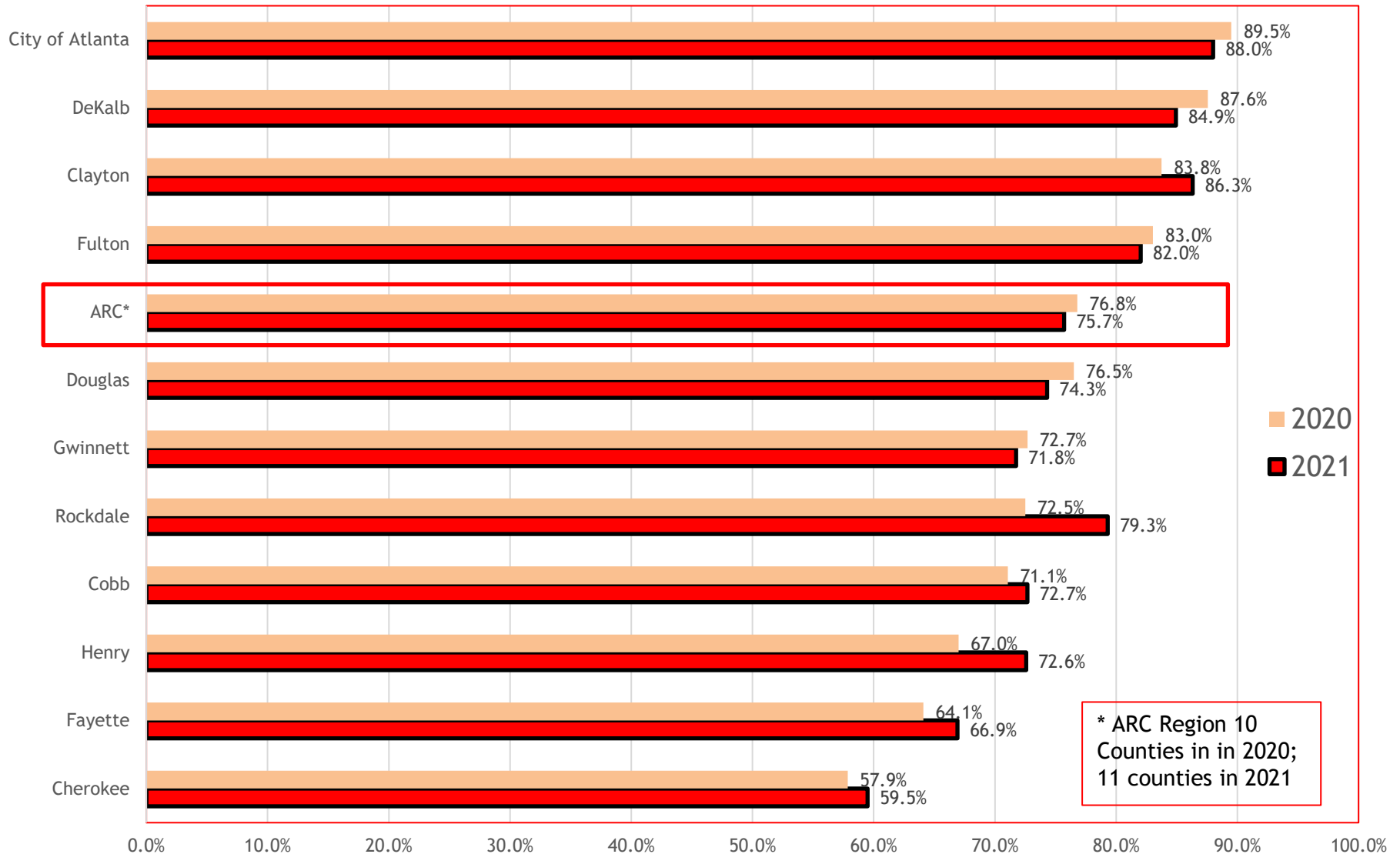




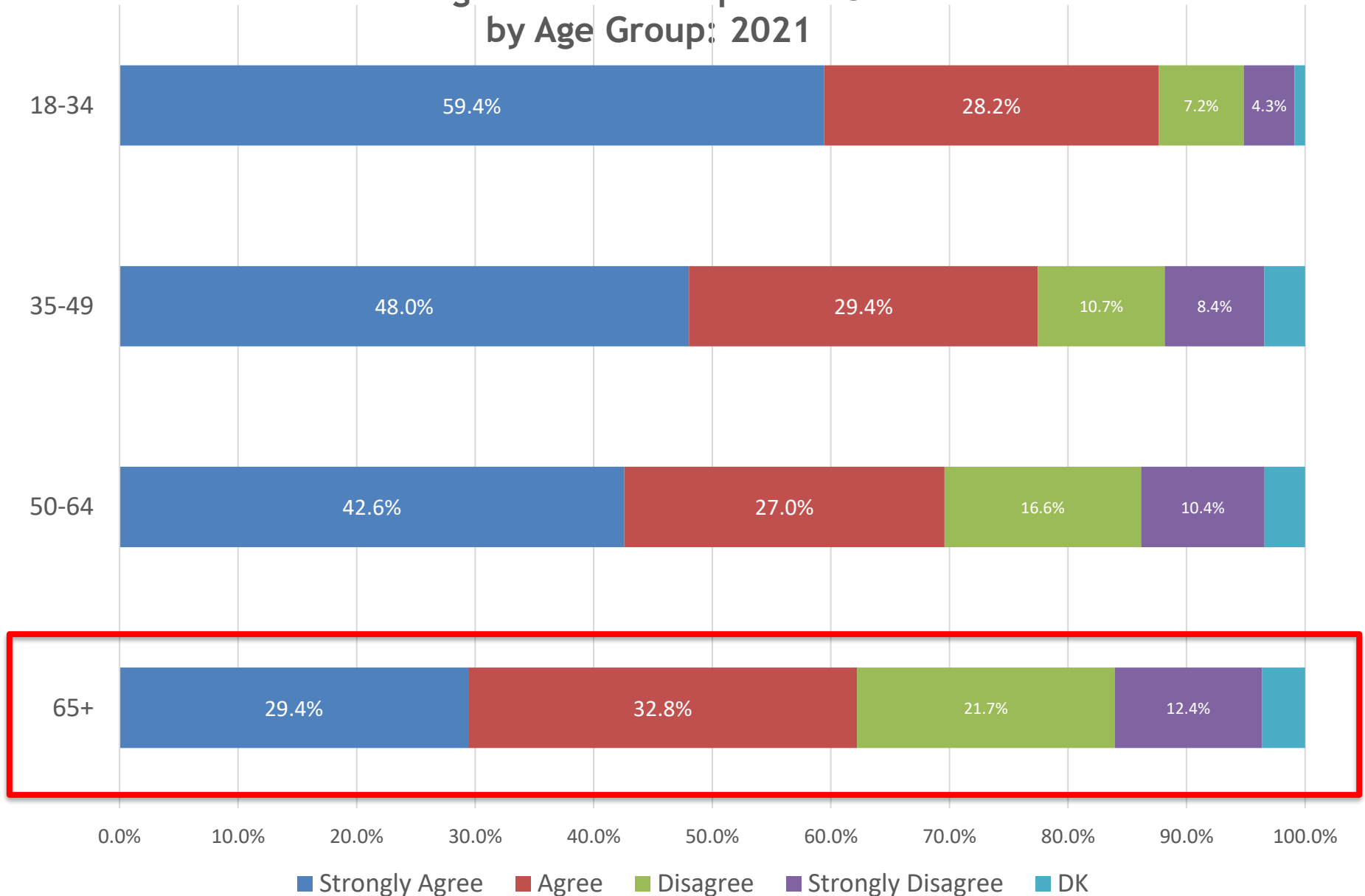
# “Ensuring racial equity is essential to maximizing economic growth in our region“ by Race/ Eth: 2021



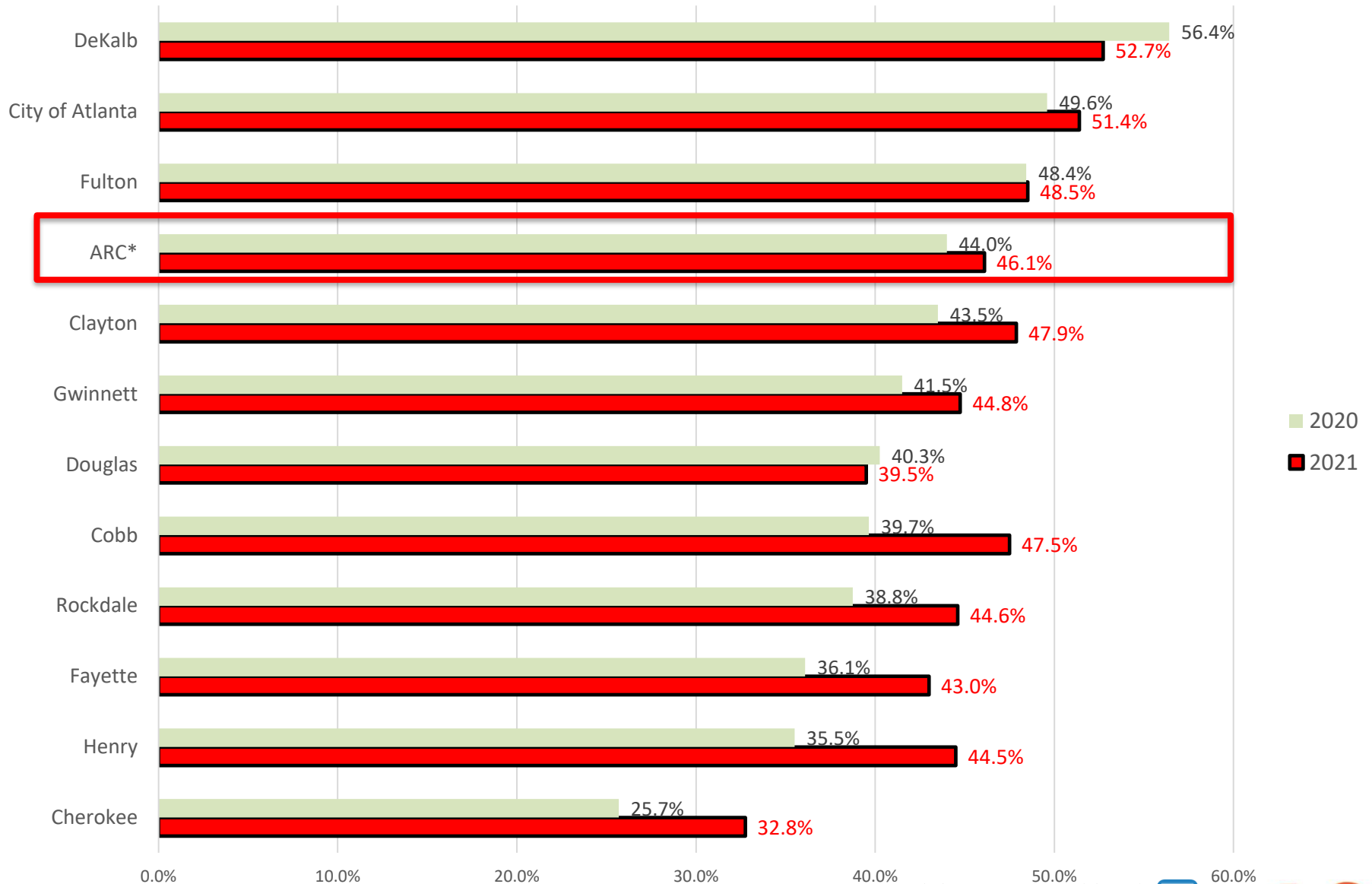
# Discrimination against Black People is a Serious Problem” Comparing 2020 and 2021



# “Discrimination against Black People is a Serious Problem” by Age Group: 2021



# Shares Open to Non-Police Response to Every Call by Area, 2020 and 2021



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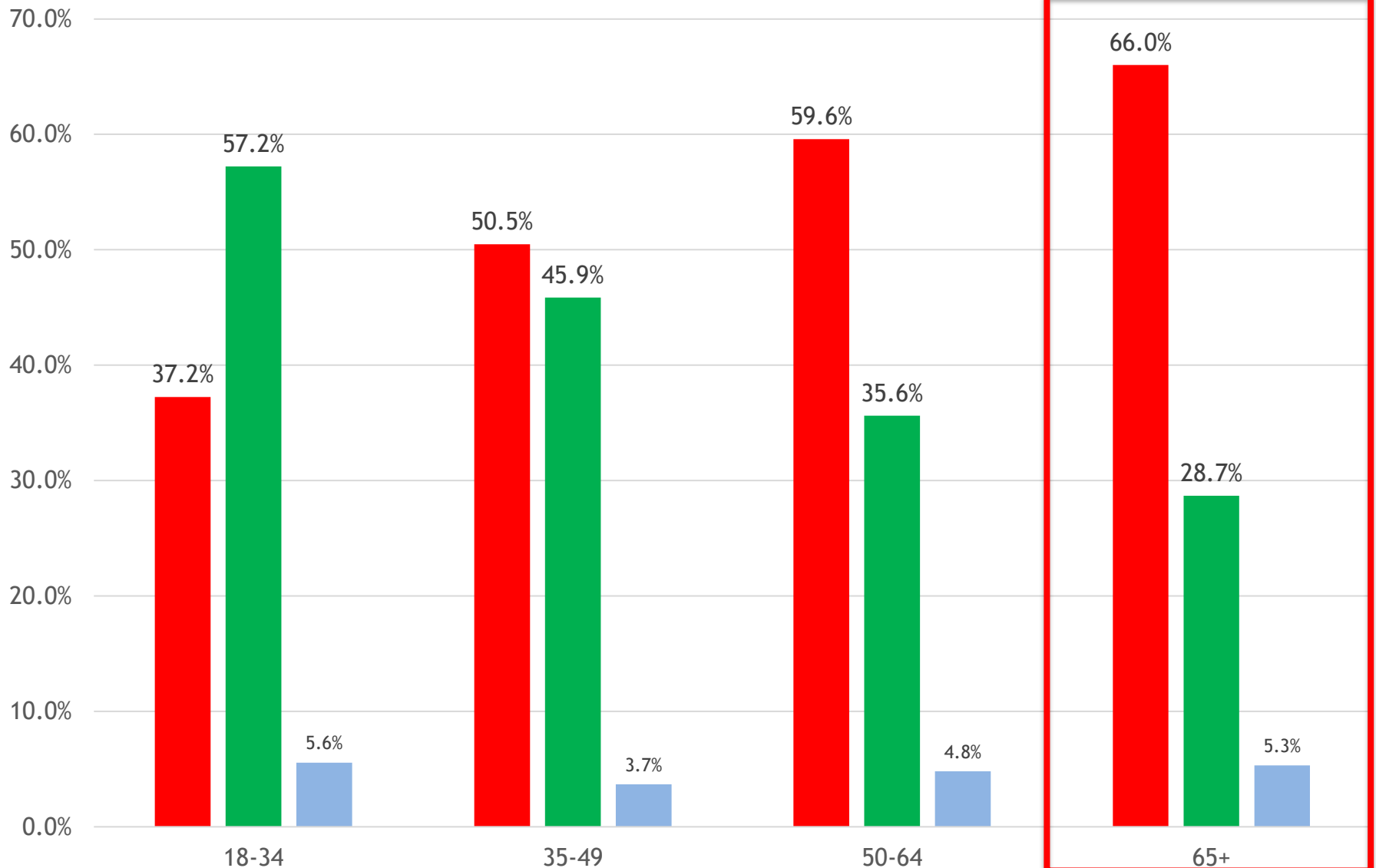
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# “How Should Police Best Be Utilized?: by Age Group: 2020

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



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The Future

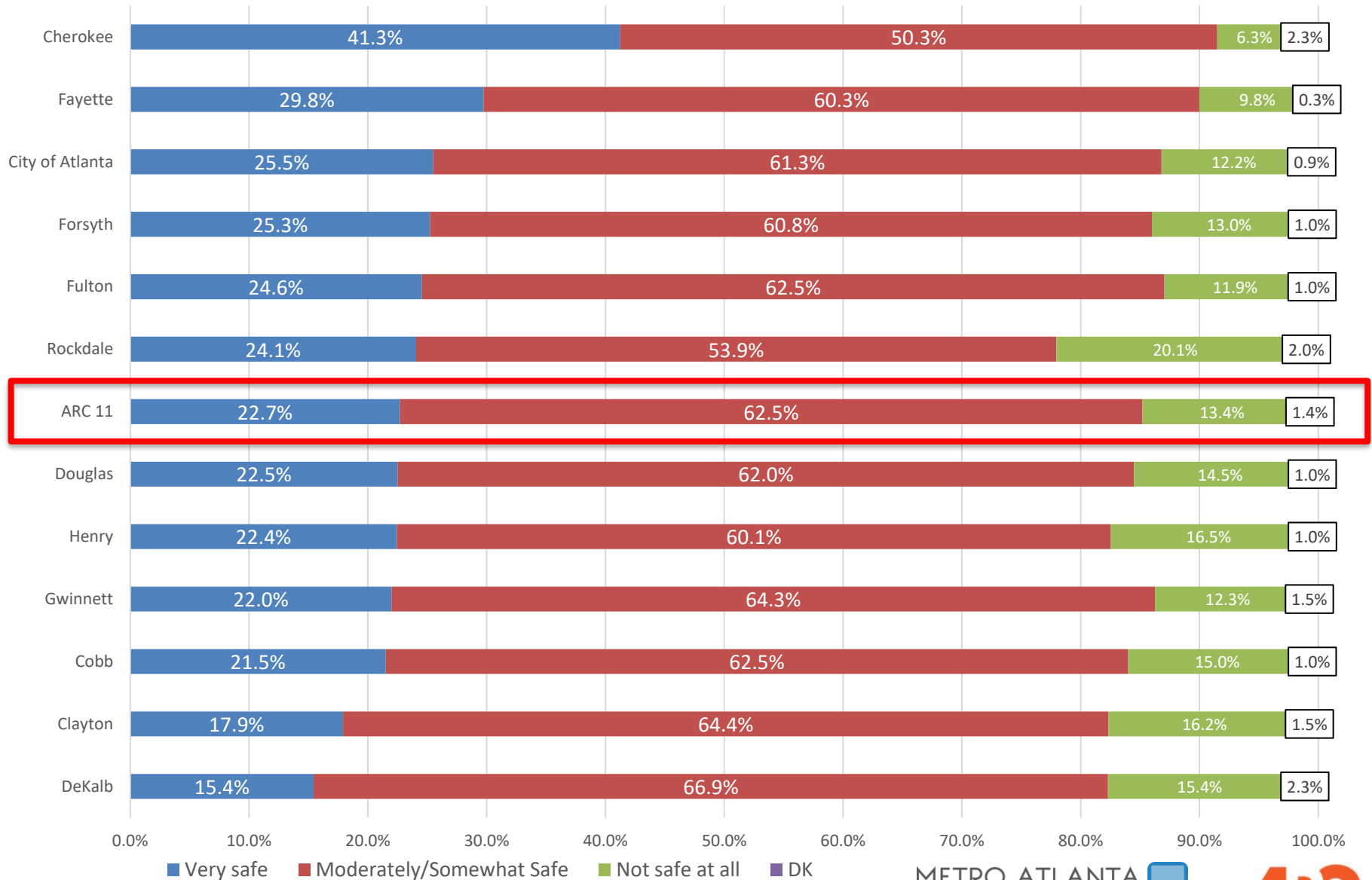


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# How safe does respondent feel resuming normal activities as community recovers from Covid? (Area)...2021

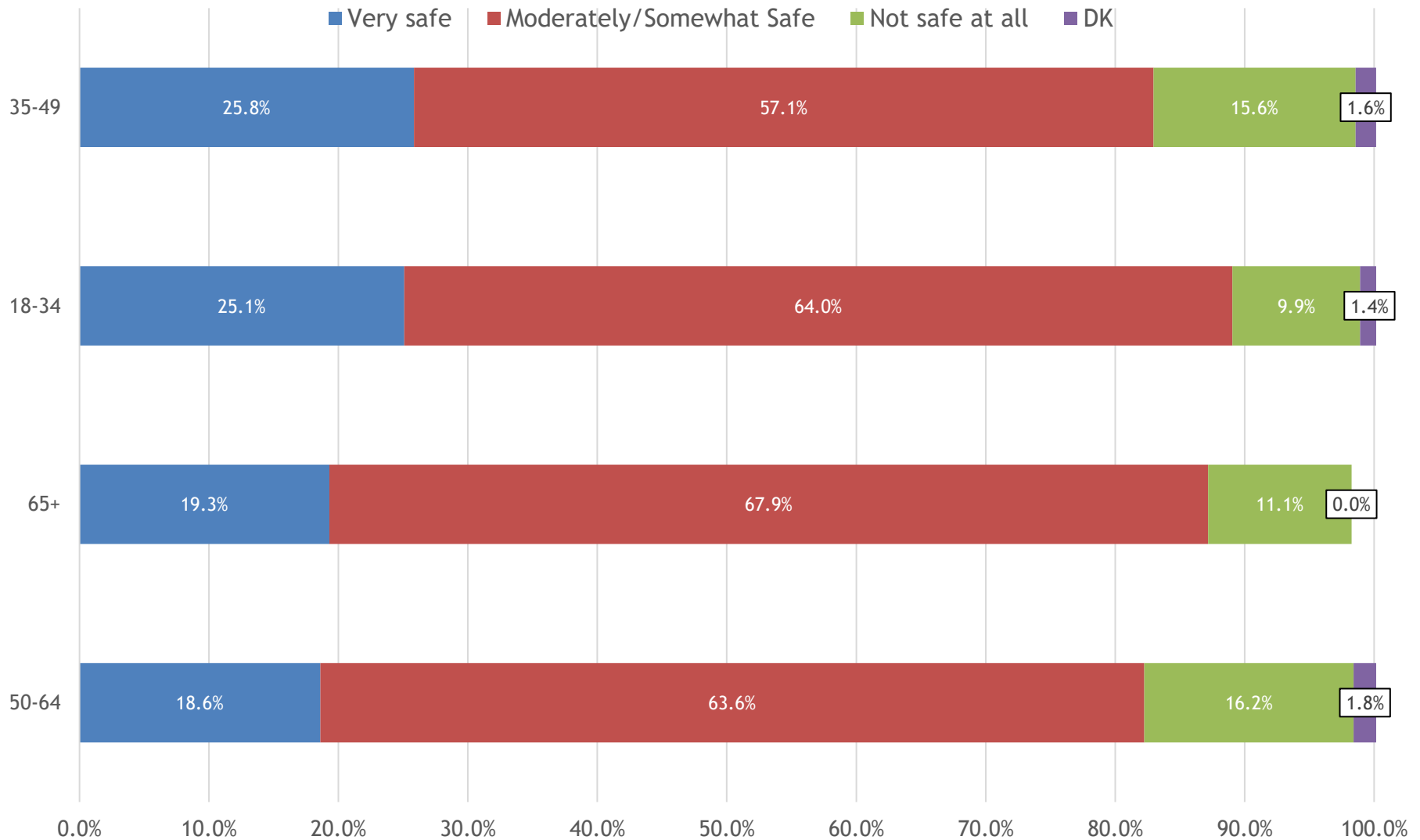


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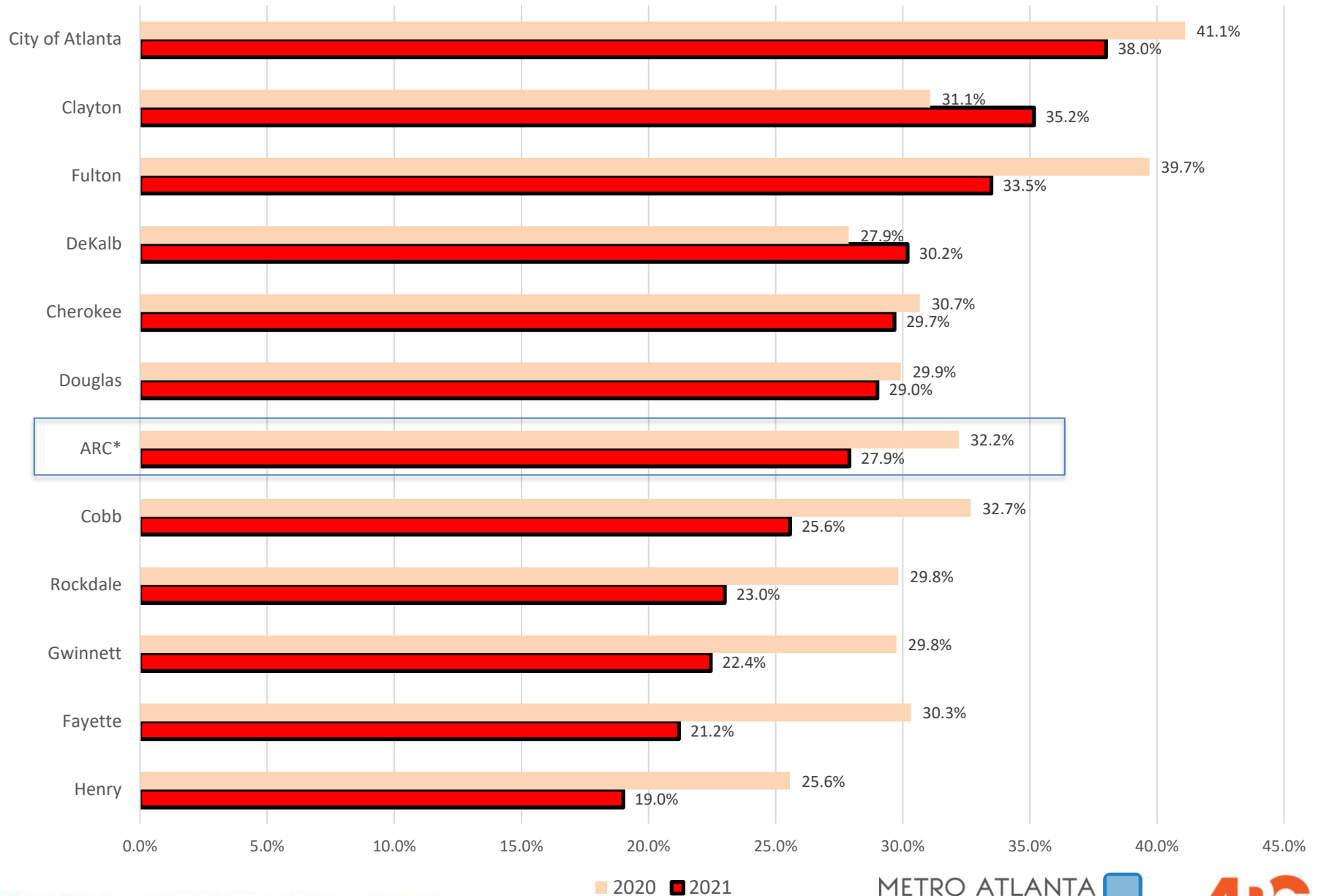
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# How safe does respondent feel resuming normal activities as community recovers from Covid? (Age)...2021



# Looking Ahead 3-4 Years... “Better?” 2020 cf: 2021



2020 2021

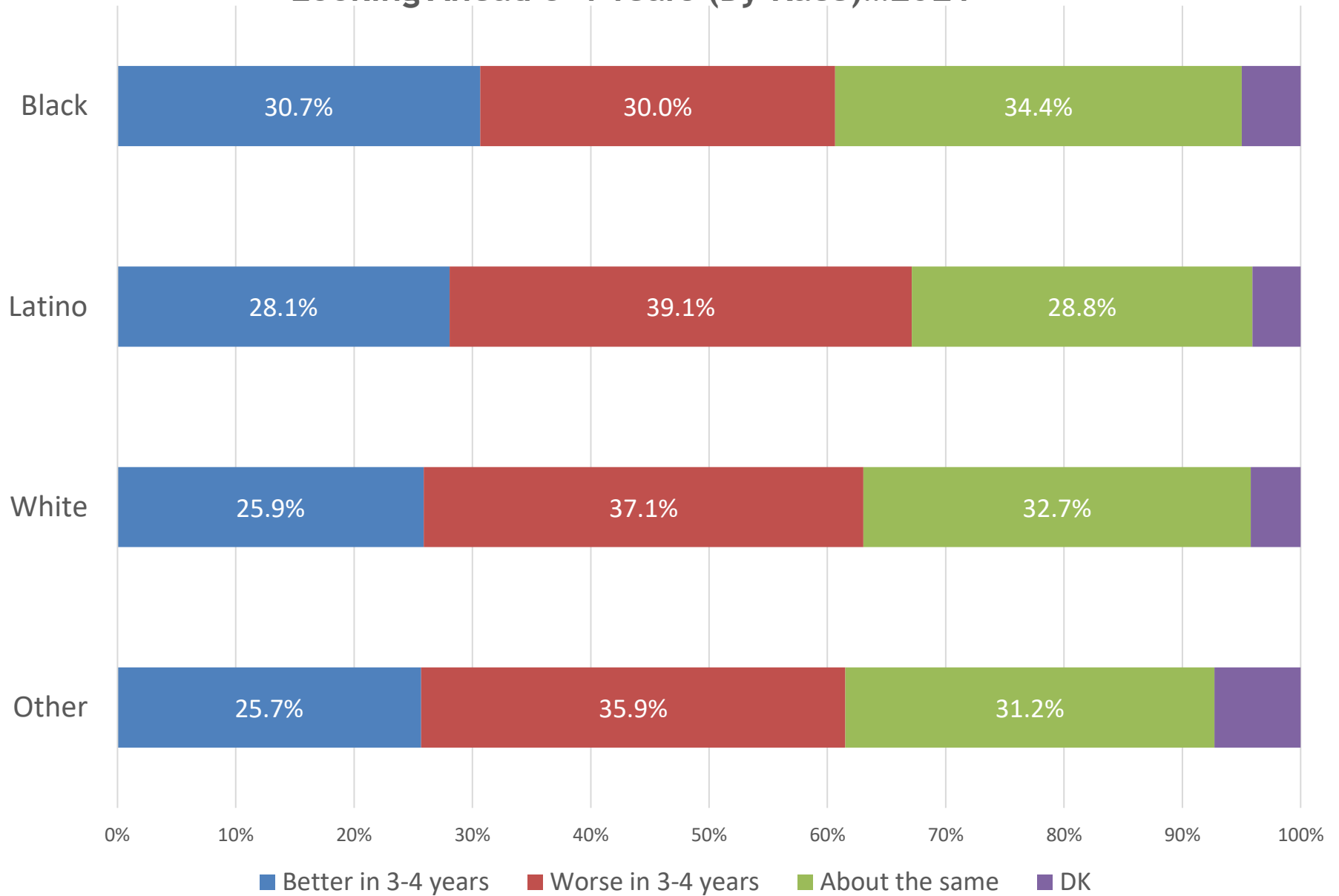
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## Looking Ahead 3-4 Years (By Race) ...2021



# For (Much) More Information...

Special County-Specific Workbooks

Let Us Know About Questions



POSTED BY ATLANTA REGION PLANS & REPORTS

**Metro Atlanta Speaks Survey Offers a Snapshot of Region's Top Concerns**

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.



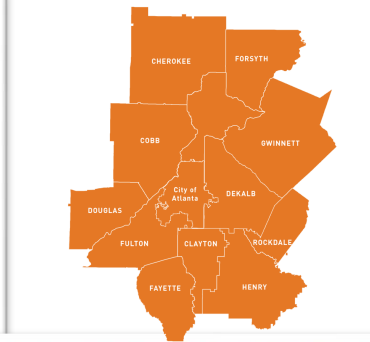
Data stories: The 33N blog has a [page](#) devoted to analysis of Metro Atlanta Speaks results.



Jim Skinner, Data Analyst Administrator  
Research & Analytics, Center for Livable Communities, ARC  
[jiskinner@atlantaregional.org](mailto:jiskinner@atlantaregional.org)

# What's Coming (and *Probably* Going)

- Changes....
  - No 2022 MAS (at least like 2014 to 2021, or maybe not even like 2013)
  - Why? Reason 1: Financial Pressures
  - 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)

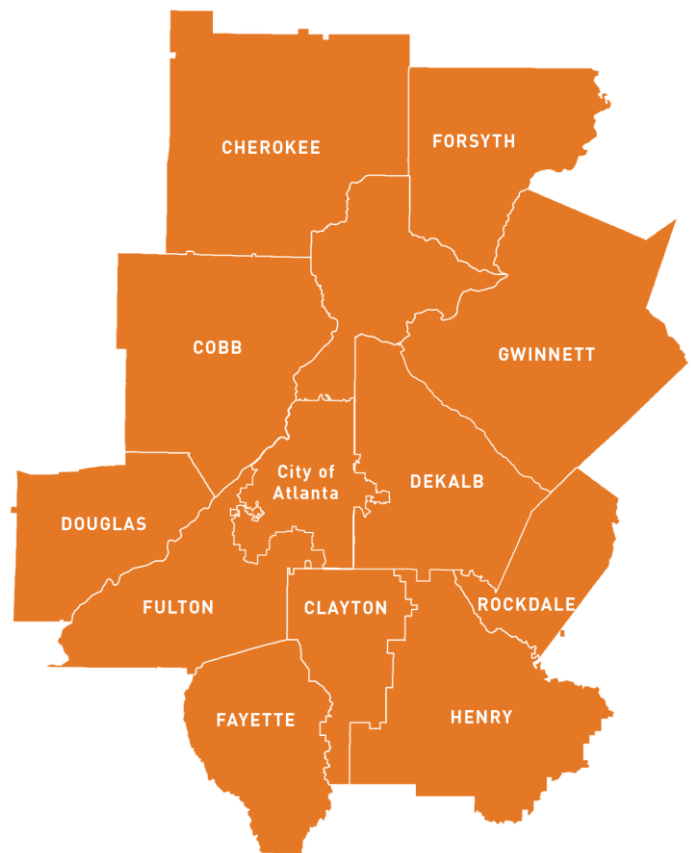
# What is the CEDS?

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](http://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



TASKS	Jan '22		Feb '22		Mar '22		Apr '22		May '22		June '22	
	1/15	1/31	2/15	2/28	3/15	3/31	4/15	4/30	5/15	5/31	6/15	6/30
<b>Task 1- ENGAGEMENT</b>									★		★	
1.1 - Focus Groups												
1.2 - Interviews												
1.3 - Surveys												
1.4 - General Public Engagement												
<b>Task 2- Develop Strategic Direction/Action Plan and Evaluation Framework</b>												
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												
<b>Task 3- Document Format Development</b>												
<b>Task 4- Prepare Project Final Deliverables</b>												
4.1 - Draft CEDS Document									Due 5/6			
4.2 - Final CEDS per Committee and ARC Comment											Due 6/10	

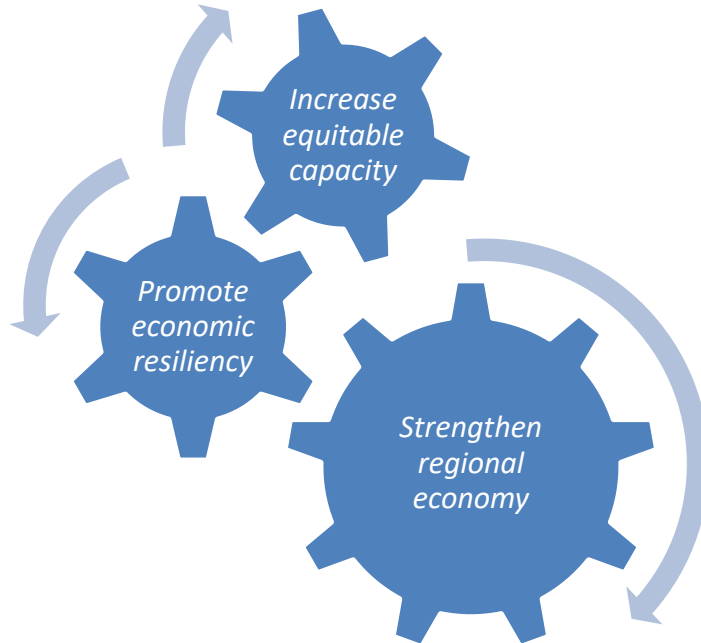
★ Draft CEDS Complete

★ ARC Adoption of CEDS

# SWOT (Data) Analysis Highlights



# Guiding Principles



# CLUSTER ANALYSIS

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

Employer	Full-Time Metro Area Employees (as of 12/31/20)	Employer	Full-Time Metro Area Employees (as of 12/31/20)	
Emory University	32,594	Publix	10,757	Education
Delta Air Lines	27,535	Children's Healthcare of Atlanta	7,711	
Northside Hospital	23,600	Cox Enterprises	7,417	
Gwinnett County Public Schools	21,493	Argenbright Holdings	7,410	
The Home Depot	18,600	State Farm	7,300	Private Business
Wellstar Health Systems	17,740	Georgia Institute of Technology	7,180	
Piedmont Healthcare	16,000	Northeast Georgia Health System	7,035	Medical/Healthcare
Cobb County Public Schools	12,179	Georgia State University	5,550	
UPS	11,300	Cherokee County Public Schools	5,000	
Fulton County Public Schools	11,172	Grady Health System	4,928	

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

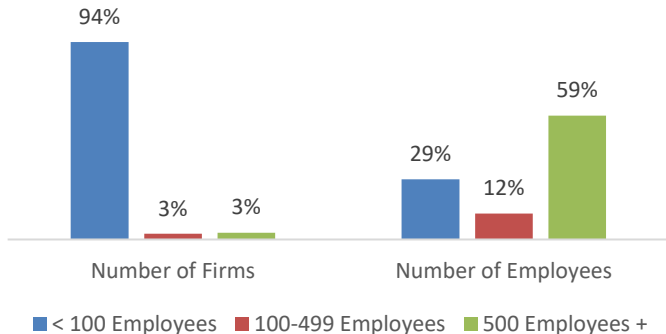
# FIRM SIZE

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

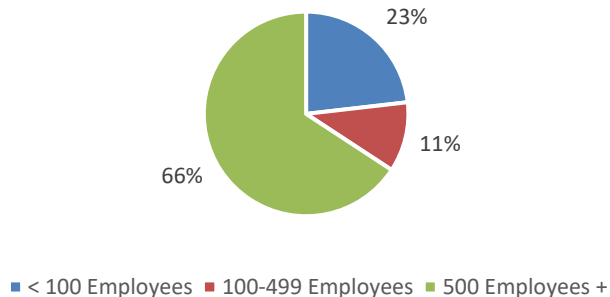
However . . .

- 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.

Share of All Firms (2019)



Annual Payroll (\$1,000, 2019)

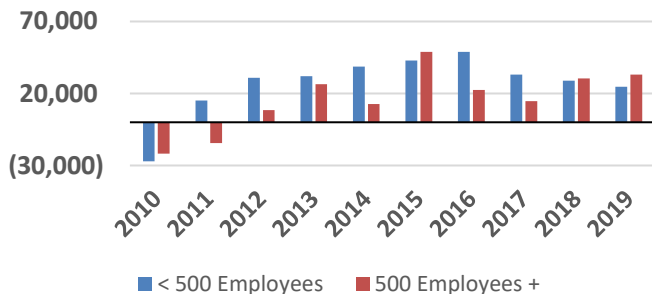


# FIRM SIZE

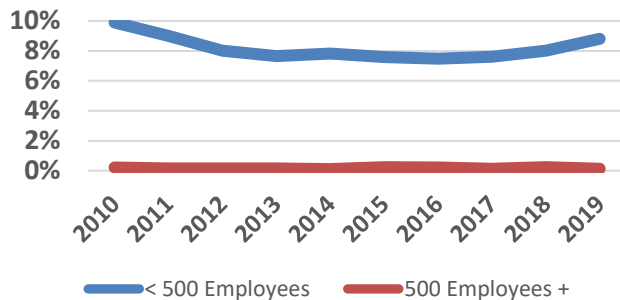
Over the past decade, firms with **less** than 500 employees have been larger net creators of jobs within the region, creating nearly **270,000 jobs vs. 161,000 jobs** created by firms with fewer than 500 employees.

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

## Net Job Creation

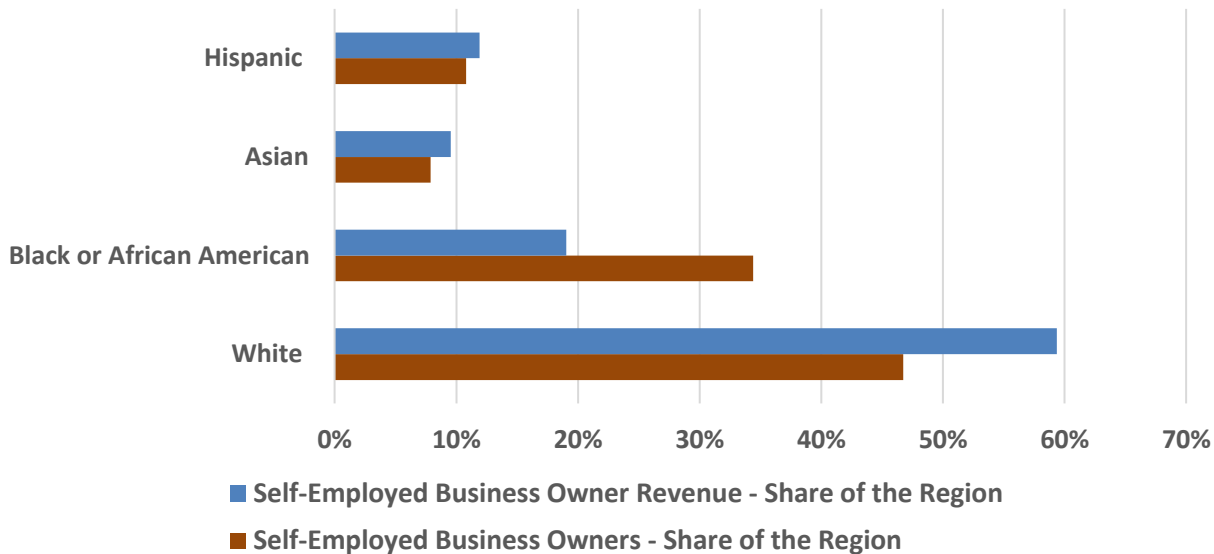


## Annual Closure Rate By Firm Size



Source: KB Advisory Group from U.S. Census Annual Business Survey (2020) and Business Dynamics Survey (2019)

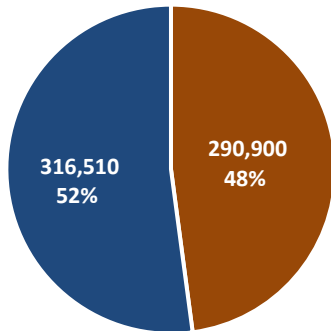
# SELF-EMPLOYED BUSINESS OWNERSHIP



Source: U.S. Census Bureau's Non-Employer Business Statistics

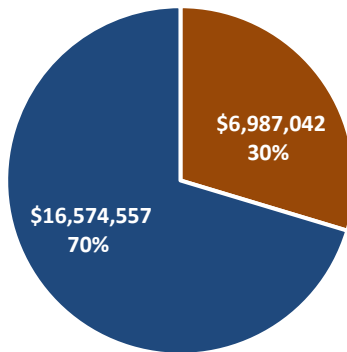
# SELF-EMPLOYED BUSINESS OWNERSHIP

Self-Employed Business Owners by Gender



■ Female ■ Male

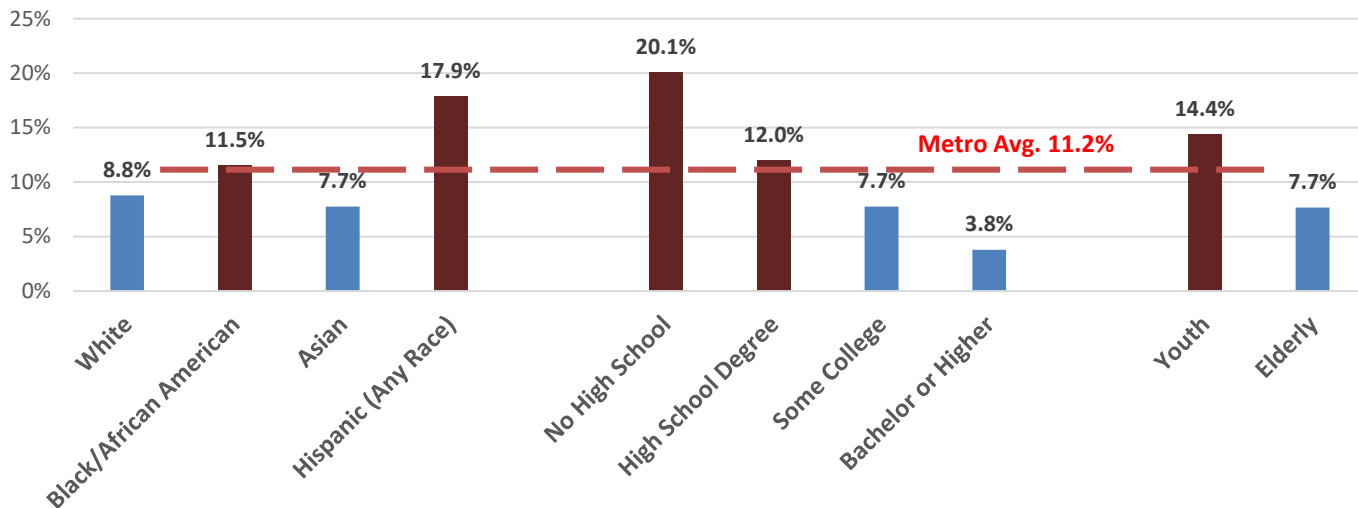
Self-Employed Business Revenue (\$1,000s) by Gender



■ Female ■ Male

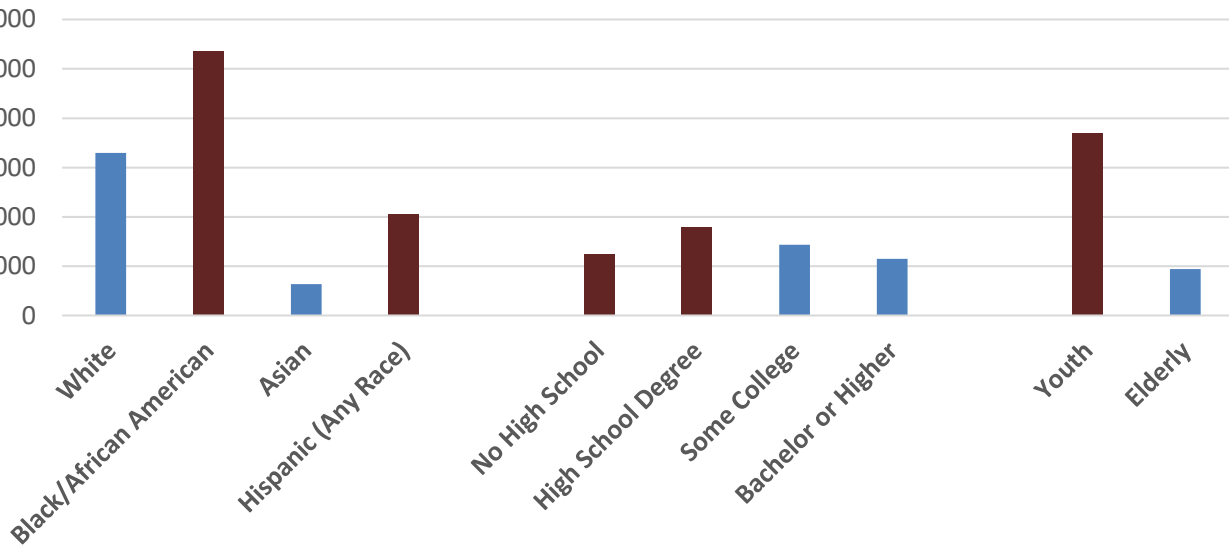


# POVERTY RATE, 2020



Source: U.S. Census Bureau

# CONCENTRATION of POVERTY, 2020



Source: U.S. Census Bureau



# Input Session



The background of the slide is a photograph of a city street scene, likely in New Orleans, featuring historic buildings and a streetcar. A semi-transparent blue rectangular overlay covers the middle portion of the image, serving as a backdrop for the text.

## **What actions are needed to:**

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

## **What partnerships are needed?**



# Outreach Activities

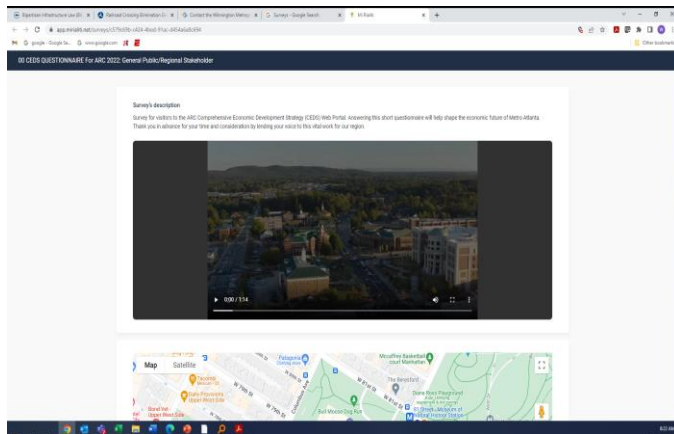
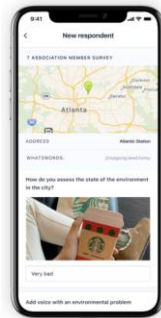


# Targeted Surveys

## 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





# Targeted Survey Links

## **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](http://atlantaregionalceds2022.org)

## HELP US NAME OUR NEXT REGIONAL ECONOMIC DEVELOPMENT PLAN!



ARC is launching the update to the Comprehensive Economic Development Plan. To create the new plan, we will engage people who live, work, learn, and play in the Atlanta area and develop action steps and goals to achieve a more equitable, resilient, and sustainable region which focuses on our greatest asset – Our People.

There's just one problem: our temporary placeholder name has been "**The Comprehensive Economic Development Strategy (CEDS)**" – following the Economic Development Agency (EDA). However, we don't think that name really represents economic development and the spirit of our region. As ARC develops the groundwork for the plan, we need a plan name that will motivate and inspire people from all over the region.

That's where you come in:

Who better to help us name our next big project than the people of our region which will be impacted by the plan? So, we're opening it up to your suggestions.

**CEDS** COMPREHENSIVE ECONOMIC  
DEVELOPMENT STRATEGY



AN INCLUSIVE AND EQUITABLE ECONOMY IS FOUNDATIONAL TO  
THE SUCCESS OF OUR REGION.





# **Thank you!**

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