

Central
Atlanta
Progress



Atlanta
Downtown
Improvement
District



City
of
Atlanta



JSA-McGill Livable Centers Initiative (LCI) Study

EXECUTIVE SUMMARY

*Submitted:
December 2003*

Prepared by:
Urban Collage, Inc.
Cooper Carry, URS Corp., ZVA, ZHA, HPE, Verge Studios, Biscuit Studios and PEQ



OVERVIEW

In 2003, the Atlanta Regional Commission granted Central Atlanta Progress a planning grant through its Livable Centers Initiative (LCI) to focus on developing a long-range plan for the Jones-Simpson-Alexander-McGill Corridor (JSA-McGill). The Livable Centers Initiative promotes the development of action plans to enhance livability, connectivity and mobility within existing town centers throughout the Atlanta region, while identifying development and redevelopment opportunities.

The JSA-McGill Study provides Downtown residents, property owners and business owners with an opportunity to reevaluate their neighborhood, envision improvements to strengthen the area and develop an action plan for achieving that vision. The JSA-McGill process included four phases: Inventory and Assessment, Visioning, Framework Plan and Action Plan.

INVENTORY AND ASSESSMENT

The Inventory and Assessment included documentation of existing conditions within the JSA-McGill corridor in the summer of 2003. This included demographics, existing land uses, existing zoning, historic resources, character and building conditions, building occupancy, existing transportation and circulation, existing market conditions, susceptibility to change and Study Area issues and opportunities.

The JSA-McGill LCI Study Area focuses on an east-west corridor in north Downtown Atlanta comprised predominately of surface parking lots, but poised to capitalize and connect with developments surrounding its boundaries. The area is anchored on the east by the Boisfeuillet Jones Atlanta Civic Center, SciTrek and Georgia Power complexes, on the south by Baker Street, on the west by the Northside Drive, and on the north by Mills Street through to Williams Street, and then Pine Street east to Courtland Street. The JSA-McGill study area includes the Georgia Aquarium (currently under construction) and World of Coca-Cola projects, newly built high-rise condominiums, the underutilized Civic Center MARTA station, and the pedestrian barrier defined by the I-75/85 Downtown Connector overpass.

DEMOGRAPHIC INFORMATION

The JSA-McGill Study area has seen significant changes in its demographic profile since 1990. New residential developments around Centennial Olympic Park have resulted in an increase in population numbers. Based on Census data, the population has grown by 8.6%. There are currently 1,202 housing units in the study area (based on survey) and about 2,404 people (2.0 persons/household). 15,564 people are employed within the study area (based on a survey by ZHA, Inc.)

KEY ISSUES (as defined by the JSA-McGill Stakeholders)

Land Use and Development

- There are significant development opportunities in the corridor
- Compatible development along Luckie street is important to the Aquarium
- Municipal parking might be used as a development incentive

Economic Development

- There is little demand for Class A office space downtown at the present time
- There is demand for small-to-medium sized exhibition space at the Civic Center

Housing

- There are ongoing development plans and strong support for new housing in the Centennial Hill area
- Condominium developments require secure, dedicated parking

Historical and Natural Resources

- Marietta Street is a historic resource but will face development pressure

Transportation and Circulation

- Baker Street should remain open to vehicles except for special events
- Parking on Baker Street is a potential problem due to poor pedestrian visibility
- School bus staging for the Aquarium/World of Coca-Cola requires multiple solutions
- Shuttle buses from the Georgia World Congress center to the hotel districts will use JSA as part of a loop route
- I-75/85 access and egress needs to be improved

Community Facilities

- The Peachtree-Pine homeless shelter is a serious problem for the area
- Renaissance Park is being used by the homeless and vagrants as an encampment

Urban Design

- The Centennial Olympic Park 'spine' is very important to the Aquarium
- The pedestrian environment on JSA faces challenges especially behind the Aquarium and World of Coca-Cola Development
- An open space bridging I-75/85 at Peachtree Street has been proposed as a civic improvement and a development catalysts



EXISTING CONDITIONS

The JSA-McGill study area is made up of about 329 parcels covering approximately 145 acres of land. The land use categories derived for this study are a compilation of the City of Atlanta's land use classification system and Fulton County's land use categorization.

Commercial uses make up about 12% of the land use in terms of acreage. The character of commercial development ranges from the low-density historic to office towers. Institutional uses dominate the corridor with the Boisfeuillet Jones Atlanta Civic Center and Georgia World Congress Center occupying about 29 acres of land. Historic churches and the Emory Crawford Long Hospital are additional institutions located within the study area. Private and public open spaces combined provide less than 2% of the total acreage. A wide variety of residential uses are scattered throughout the study area. Finally an astounding 64 acres, nearly 43% of the study area land is either vacant or occupied by surface parking lots.

Over three-fourths of the buildings in the study area are found to be in **very good** condition. Buildings found to be in **good** condition are mostly smaller commercial establishments along Marietta Street, Baker Street and Peachtree Street. They require minor repairs. Very few buildings are found to be in **fair** condition and there are no **deteriorated** buildings.

A majority of the buildings in the study area are **occupied**. The **unoccupied** buildings include the Boomershine building (under renovation at the time of the survey) and the Medical Arts building. Some of the high-rise office towers were evaluated to be partially unoccupied based on office occupancy data in Downtown Atlanta (occupancy rate less than 90%).

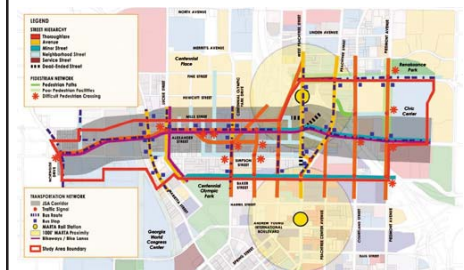
The City of Atlanta regulates the development of all real property through the use of zoning districts. Central Atlanta Progress and City of Atlanta is currently in the process of reviewing and updating the zoning code for Downtown Atlanta.

The vehicular grid in the corridor is reinforced by a network of transit options. About one-third of the study area is within walking distance of two MARTA rail stations. The City's 'Commuter On-street Bike Plan' identifies Luckie Street as a potential bike path connecting Georgia Tech to Downtown. The JSA corridor has also been identified for a proposed bike path connecting to the Freedom Parkway trail. Given Downtown's complex street grid, traffic signalization and timing are an important issue in the study area, a detailed traffic study will be required to maintain the vehicular flow while supporting the additional pedestrian activity within the corridor.

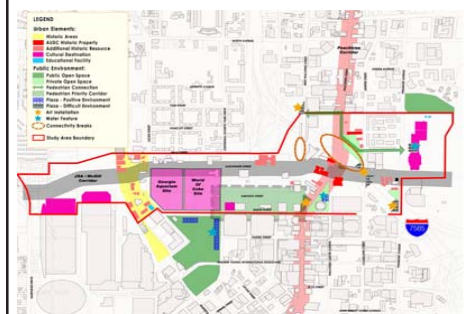
Land Use Type	No. of Parcels	Acreage
Commercial H.D.	5	7.63
Commercial L.D.	37	7.64
Commercial M.D.	6	2
Industrial	4	1.8
Institutional	34	37.42
Lodging	4	3.1
M.U-Residential	8	6.73
Multifamily H.D.	1	.25
Multifamily M.D.	1	8.47
Open Space	1	.45
Parking Deck	4	2.15
Parking Lot	135	50.29
Private Open Sp.	11	2.23
Utility	18	1.78
Vacant	60	13.74
Total	329	145.68



Existing Land Use



Existing Circulation



Urban Design Framework



MARKET CONDITIONS

Housing Trends

Based on Zimmerman/Volk Associates' field investigation, analysis of migration and mobility data, and assessment of the assets and opportunities of Downtown Atlanta, new housing units within Downtown are likely to attract potential renters and buyers from elsewhere in the City of Atlanta as well as other states. The JSA-McGill LCI Study Area could support, and the market could absorb up to 1,500 new dwelling units within the next five years.

For the multifamily market, younger singles and couples (childless households) have been identified as the largest general market (about 70% of the market for housing units). Empty nesters and retirees are the next group most likely to locate in Downtown (just under 25%). The preferred building types includes; loft apartments, conventional apartments and mansion apartment buildings.

Retail Trend:

The JSA-McGill Study Area's retail potential will be driven by proximate markets. These markets are employees, residents, and hotel guests within easy walking distance (one-quarter mile) to the Study Area and visitors to the new Aquarium and World of Coca-Cola projects.

To capture a proportion of these sales will require that retail be clustered to create enough critical mass. Eating and drinking sales make up a vast majority of the retail sales potential and the most strategic location is Simpson Street. Additionally, stand alone retail will have potential on Alexander Street. The retail market consultant ZHA concludes that between 75,000 and 100,000 square feet of retail are likely supportable in the JSA-McGill Study Area through 2010.

Office Trend:

The JSA-McGill Study Area is well positioned for office development. Recent trends suggest that Downtown office space is struggling, therefore, it is unrealistic to assume that office uses will rapidly absorb the available land in the JSA-McGill corridor between now and 2010. Conclusions regarding supportable office square feet are based on an assumption that the JSA-McGill corridor evolves into a mixed-use district with significant housing and retail and entertainment land uses.

The product could be moderately priced, new office space in a non-high-rise building. Loft office product would contribute to a neighborhood environment. This type of product would target the Class-B office user, priced out of Midtown and Buckhead. ZHA concludes that 350,000 to 500,000 square feet of this office product is likely supportable in the JSA-McGill Study Area between now and 2010.



Housing and Retail



Institutional



Office and Transit



Open Space



COMMUNITY PARTICIPATION

A significant portion of the work done on the JSA-McGill LCI study involved public participation in many different forms. As part of the *Imagine Downtown* process, JSA was publicized as one of five focus areas requiring planning attention. Dates and times of all public events were posted on the Central Atlanta Progress website as well as the website dedicated to *Imagine Downtown*. Public participation and input opportunities included:

- One-on-one stakeholder interviews
- Project Management team meetings
- Public Workshops, Meetings and Presentations

Stakeholder Interviews

In August, approximately 20 stakeholder interviews were conducted. The interviews were conducted to promote an open forum for candid conversation between community members and the planning team before any planning concepts or alternatives were considered.

Public Workshops

The centerpieces of the public involvement process were three public workshops, the second being a three-day long 'Charette Week' designed to build awareness and excitement through an intense set of collaborative exercises.

Over 200 persons attended the first public workshop. The purpose was to kick off the JSA-McGill LCI process by introducing the project and the team, and to conduct interactive exercises to gauge the initial level of consensus on issues and priorities. Participants were encouraged to visit each of three stations to take part in both an 'issues' exercise and a 'community mapping' exercise.

The second public workshop was held over the course of three days. This 'Charette Week' was intended to provide the public with an opportunity for a focused, structured dialogue on key planning issues for the corridor including land use, circulation and urban design, followed by a team working session culminating in a third-day public presentation of the consensus plan. Both the initial session and the public recap were well-attended with over 100 persons at each.

The third and final public workshop was structured as an open house, where all of the graphic products were on display, approximately 60 people attended. Members of the planning and project management teams were on hand to explain the plan and the choices made, as well as answer any questions that might arise. As a final exercise, note cards were distributed to those who wanted to comment in writing on the plans.



Proposed Residential Character



Proposed Avenue Character



Proposed Plaza Character



Workshop #2



JSA-McGill LCI Plan

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LCI CONCEPT PLAN

The Land Use Framework Plan

The land use framework plan is essentially two interwoven elements – a future land use plan, and an open space plan which order future development. The corridor is bracketed by major institutional uses with a scattering of high-density commercial and medium-density residential. Developable land aggregates into five distinct districts.

Each district's future land use and development strategy are reflective of themes either present in existing development or resulting from public consensus during Charette Week. Each future land use and development 'district' has an associated public/open space that serves to give the area an urban design focus and reassure private sector developers of significant public commitment. A 'live-work' future land use classification is proposed in buildings that are double-fronted along Mills Street. Additionally, a widened streetscape or 'linear plaza' on the north side of JSA provides a workable foreground to the commercial space. At the eastern extreme of the corridor, developable parcels around the Civic Center and Peachtree Street are targeted for residential and retail mixed use.



Land Use Framework Plan



Illustrative Plan

The JSA-McGill Illustrative Plan

The JSA-McGill Illustrative Plan builds a vision of the future that is based upon input from many sources, both inside and outside the community. The overriding goals and objectives throughout this process seek to create an identity for JSA-McGill, restore and improve the public realm to create a place for the pedestrian, and to create new neighborhoods and strengthen connections.

The five districts are identified as: the Marietta Street corridor; the JSA-Centennial Place spine; the area known as Centennial Hill; the district around the Peachtree / McGill / I-75/ 85 intersection; and the Civic Center surroundings.



Civic Center Plaza



The Village



JSA Linear Park and Plaza



LCI CONCEPT PLAN

The Transportation Framework Plan

The most extensive transportation improvement in the corridor is the one that spurred the LCI project from the start – the new JSA-McGill. First proposed in 1999, the project has completed the conceptual design phase and been approved by the Georgia Dept. Of Transportation. The project will be constructed in phases to provide critical transportation improvements prior to the opening of the Georgia Aquarium in 2005. Construction of the segment between Luckie Street and West Peachtree Street is scheduled in 2004.

The need for the project arises from several issues in the area including the ongoing development activity, the lack of sufficient connections across the railroad between the neighborhoods to the east and west sides of Downtown, and the importance of providing a direct route between the Georgia World Congress Center and the hotel district that is designed to accommodate bus and pedestrian traffic. The basic design features four 11' travel lanes, two in either direction, with a variable width median and single turn lanes at key intersections and includes bike lanes, planting strips and new sidewalks. While generally following the path of Alexander Street, the design breaks from the existing street grid west of Marietta Street to gently sweep southward to the Simpson Street – Northside Drive intersection. As part of the improvement the one-way sections of JSA and West Peachtree Place would be converted to two-way operation.



Transportation Framework Plan



COP Drive Entry Park Plan



Baker Street Improvements



Luckie Street Path Option 1



Luckie Street Path Option 2



JSA-McGill LCI Plan

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LCI CONCEPT PLAN PRIORITY PROJECTS

Short-Tem Projects within 3 Years

Marietta – JSA Plaza – a landscaped / hardscaped plaza that serves as a focus for the Marietta Street neighborhood and the Georgia Aquarium district

Spring – COP Plaza – the regularization of the Georgia Dept. Of Transportation parcels at the termination of the Spring Street tunnel and the intersection of JSA and COP Drive

Luckie Street Improvements – on-street parking and the incorporation of a multi-use path (an ongoing project of the PATH Foundation)

Simpson – West Peachtree Streetscapes – new streetscapes extending from the Civic Center MARTA station to the World Of Coca-Cola site along West Peachtree and Simpson Streets

COP Drive / Williams Street Improvements – ‘road diets’ for COP and Williams by the introduction of on-street parking; provide visible parking to incite retail uses, and provide better pedestrian environments

Mid-Tem Projects 3-7 Years

The JSA Linear Plaza – the widening and enhancement of the north side of JSA between COP Drive and Luckie Street

Civic Center Plaza – an expanded and improved entry court to the Civic Center complex and adjoining development; serves to terminate the principal pedestrian approach

Reconfiguration of the I-75/85 Interchange Ramps – exit ramp realignment to penetrate the Spring Street ‘tunnel’ feeding to COP Drive, and entry ramp relocation to Spring Street north of JSA for single-occupancy vehicles

Baker – Harris Two-Way – conversion of one-way pairs to two-way movement by restriping; provides additional route flexibility between the Aquarium and World of Coca-Cola and I-75/85 as well as additional routes for local traffic

Municipal Parking Structures – parking decks built as stand-alone or part of larger projects, either as publicly funded or under a public-private partnership

Long-Tem Projects 7-25 Years

Expanded Mayor’s Park – new open space bridging I-75/85 at Peachtree flanking both sides of street and extending to the McGill – Courtland intersection

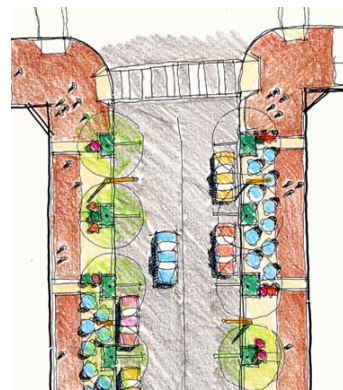
Georgia World Congress Center Phase V Mall – new landscaped promenade on northern flank of JSA from Northside Drive to the railroad viaduct, with widened median and tower elements; serves as a western gateway

The Baker Street PATH Project – streetscape and sidewalk improvements to Baker Street featuring a dedicated, traffic-separated bicycle path along the south side from Piedmont Avenue to Centennial Olympic Park

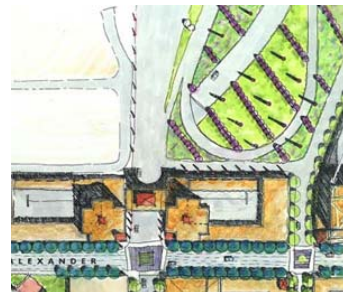
Piedmont Improvements – streetscaping and on-street parking provision for Piedmont Avenue between Harris Street and North Avenue



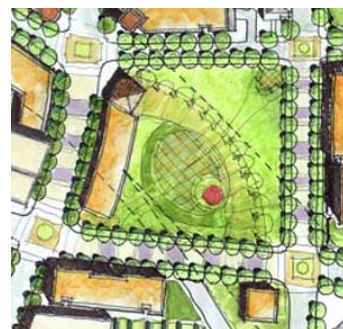
Simpson Street



Simpson Streetscape



I-75/85 Reconfiguration



Expanded Mayor's Park



IMPLEMENTATION

Strategic Recommendations

As described earlier, the JSA-McGill LCI Study forms a critical piece of an overall planning and development strategy being created for all of Downtown Atlanta as part of the *Imagine Downtown* process. This process seeks to build upon past plans for Downtown and its districts and build on the inherent physical and economic strengths of major development "Focus Areas." In the next few years, efforts will be strategically directed towards the construction of the Aquarium, World of Coca-Cola and the support infrastructure needed to support employees, visitors, and residents of the area. Consciously, the JSA-McGill LCI study includes a mix of several thousand new residential units, several million square feet of new office development, and a major new retail corridor along Simpson Street. The public improvements plan provides the opportunity to balance improvements for vehicular access, by both automobiles, shuttles and buses with pedestrians and bicyclists.

How will this be accomplished? The LCI Study and *Imagine Downtown* have brought together all of the key participants in a successful implementation plan: residents, property owners, the City of Atlanta, the Atlanta Development Authority and major institutions. The existing Westside and Eastside Tax Allocation District (TAD) and proposed Eastside TAD provide an opportunity for public sector leverage of planned improvements. Much of the property in the JSA-McGill corridor is in the hands of developers with active plans for new development consistent with the objectives of the LCI plan. It will take public investment in infrastructure, particularly public improvements to area streets and financial assistance in the construction of structured parking, to make these projects feasible. Over time, public investment should, by design, decline as the private sector accelerates its activities. This trend has occurred recently just north of the study area in Midtown and the time is right strategically to instigate comprehensive revitalization in the JSA-McGill corridor.

Regulatory Enhancements

The JSA-McGill study area has a conducive regulatory framework already in place in the form of Special Public Interest (SPI) Zoning Districts 1 and 13. These existing regulations allow and encourage mixed use, pedestrian orientation and good urban design principles of building buildings up to the street, articulating blank facades and hiding service. As part of a comprehensive update to these SPI districts, Central Atlanta Progress and the City of Atlanta have created the Downtown Livability Code (DLC). The DLC offers more definitive standards for streets and streetscapes, allowable uses, and support of transit and alternative transportation. It represents one of the most progressive "smart growth" codes in the Atlanta region and can be a model for other higher-density, mixed use districts.

LIVABLE CENTERS INITIATIVE (LCI) DELIVERABLES:

1. Efficiency/ Feasibility of Land Uses:

- Promotes a mix of retail, residential, office, institutional and open space
- Strategic placement of retail and residential to encourage connectivity
- New live/work land use classification

2. Transportation Demand Reduction Measures:

- Concentration of uses and parking facilities
- Conversion of one-way streets to two-way
- Proposed shuttle/connector to connect major venues

3. Internal Mobility Requirements:

- Implementation of sidewalks, lighting, crosswalks, bike lanes and on-street parking

4. Mixed Income Housing, Jobs-Housing Match:

- Districts with high density housing mix
- Proposed zoning update to encourage mixed-income housing

5. Continuity of Local Streets:

- Reconfiguration of the minor street network will enhance public realm
- Redesign Baker and Harris as two-way vehicular corridor

6. Need/ID of Future Transit Systems

- Routing bus lines to service new development
- New developments around MARTA will promote connectivity

7. Connectivity to Transportation System to Other Centers:

- Linear park increases pedestrian mobility to transit
- Roadway improvements

8. Center Development Organizations and Management:

- Facilitated by CAP
- CAP experience is an asset to the collaboration of entities

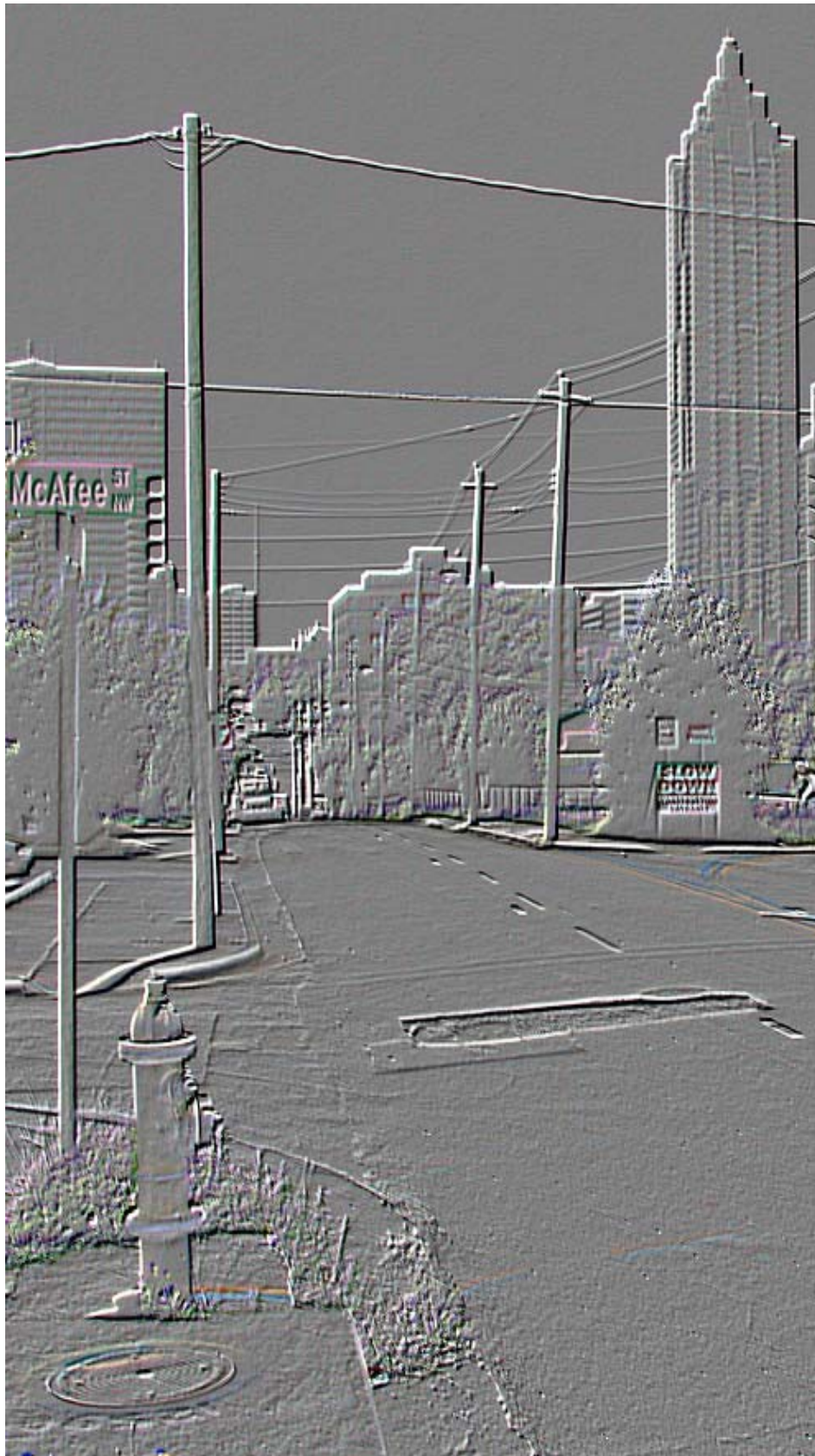
9. Stakeholder Participation/Support:

- Stakeholder interviews
- Project management meetings
- Three public workshops

10. Public/Private Investment Policy:

- CAP connection with private and public entities
- New partnerships with parking authority and developers





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JSA McGill LCI Plan

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JSA McGill LCI Plan

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Preface

1.0 Inventory and Assessment

Section 1.0 summarizes the initial phase of the JSA-McGill LCI Study including documentation of existing conditions within the study area such as study area context, demographics, existing land use, character and building conditions, historic resources, existing transportation and circulation, study area issues and opportunities and potential development opportunities.

2.0 Development Plan

The Development Plan outlines the vision established by the JSA-McGill community through the public outreach process and the future land use and circulation plan for the LCI Study Area. Included in this section are area-specific design concepts and projects, detailed development plans for high-priority projects and proposed transportation improvements for the next 25 years. This section includes the Community Vision, the LCI Study Area Concept Plan (land use and circulation projects) and the Downtown Development Program, including detailed information and data on the proposed LCI development and improvement projects.

3.0 Action Plan

The Action Plan describes mechanisms for implementing the land use and transportation recommendations described in the Development Plan. Elements of this section include Strategic Recommendations (organizational framework and city initiatives), Regulatory Enhancements (zoning amendments) and the 5-Year Action Plan (projects, costs, funding), 25-Year projections of population and employment within the Study Area and descriptions of how the JSA McGill LCI Plan addresses LCI program goals.

4.0 Appendix

The final section of this report provides documentation of public outreach and participation activities and detailed market and planning data alluded to or summarized in the body of the LCI plan.

1.0 Inventory and Assessment

- 1.1 Study Area Context
- 1.2 Demographics
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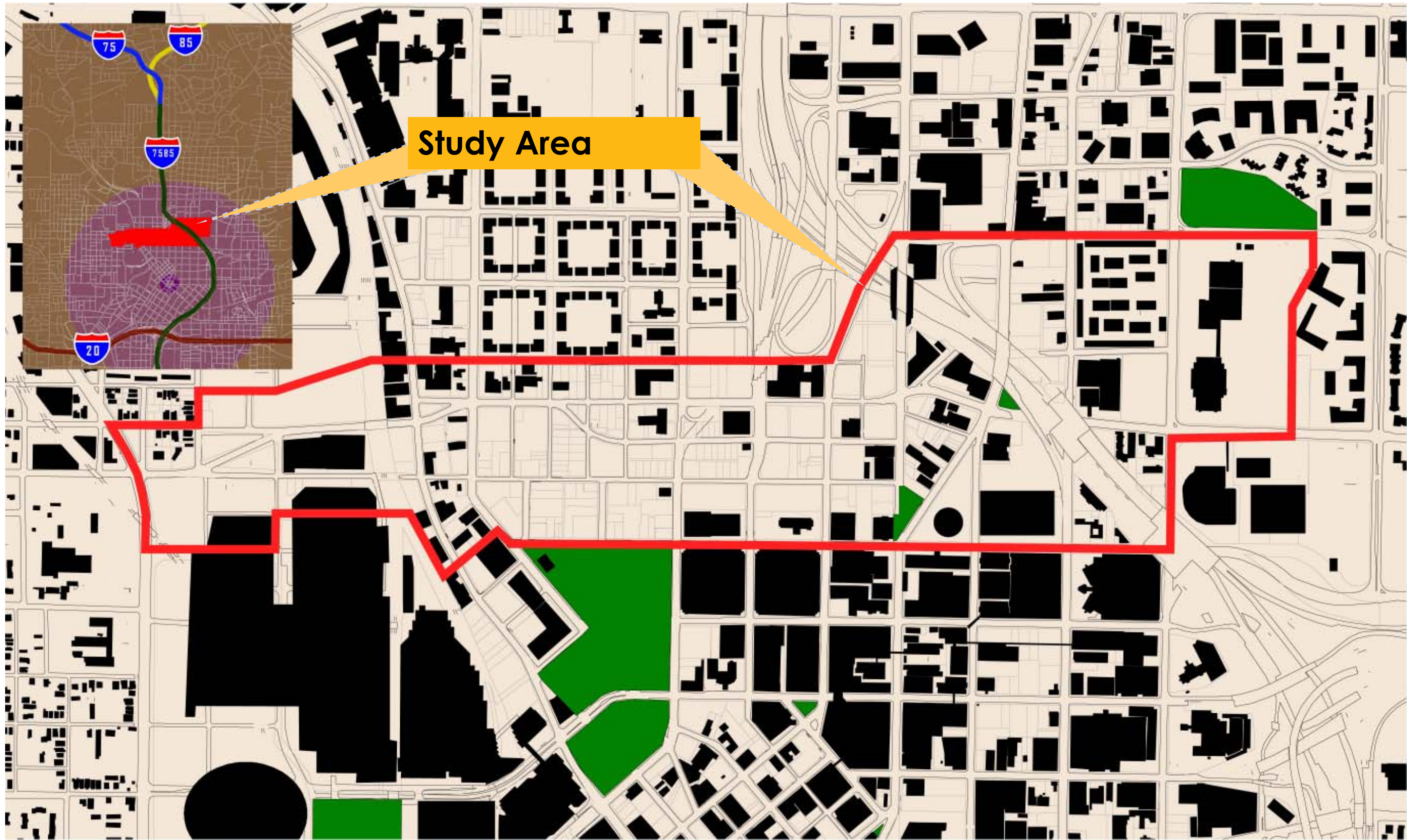
Cooper Carry, URS Corp., HPE, ZVA, ZHA, Verge Studios, Biscuit Studios & PEQ

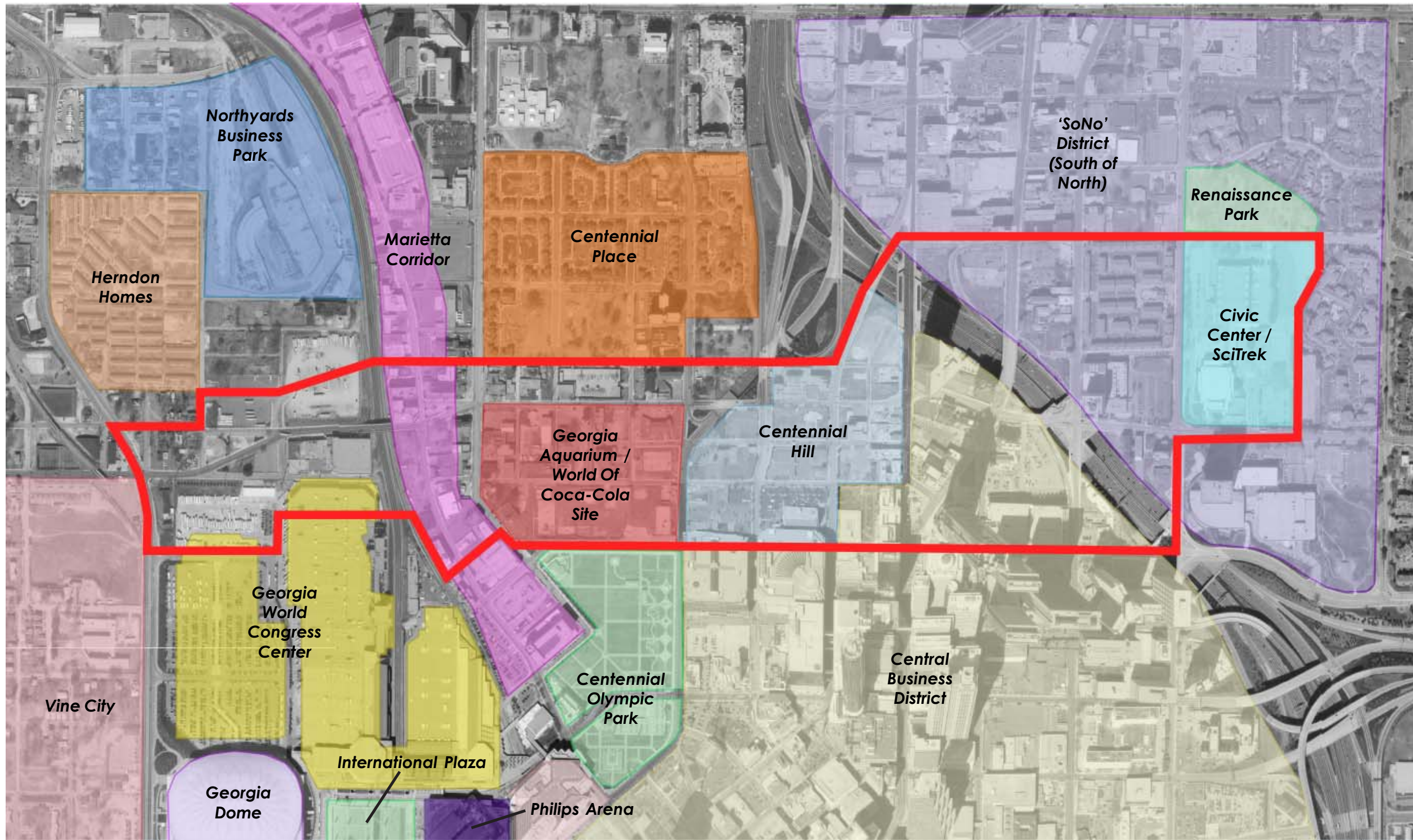
1.1 Study Area Context

The JSA-McGill study area is located in the northern third of 'Downtown Atlanta'. It is midway between the Interstate 75/85 convergence into the Downtown Connector, and the Connector and Interstate 20 interchange (Figure 1.1). The study area is approximately two miles long, from Northside Drive on the west and extending almost to Central Park Drive on the east. At its widest, along Peachtree Street and West Peachtree Street, it is only one-third of a mile across, from Pine Street on the north to Baker Street on the south.

JSA-McGill is the common way to refer to a single east-west transportation artery that traverses a number of different streets. At Northside Drive, the JSA-McGill alignment extends **Simpson Street** until transitioning over to **Jones Street** as it crosses the northbound rail line out of Atlanta. As it intersects Marietta Street, it shifts northward again to become **Alexander Street**. Alexander Street then changes name to honor journalist **Ralph McGill Boulevard** east of Peachtree Street. JSA-McGill has for many years been identified as the main east-west connector across the northern end of Downtown Atlanta, but it is only recently that design and preliminary engineering (the JSA Concept Plan) has been undertaken to improve the alignment, standardize the right-of-way and eliminate the transition between two-way traffic and one-way pairs. The Concept Plan is the genesis of this LCI study, and discussed further in Section 2.0.

Figure 1.2 shows an aerial view of the study area with major physical landmarks identified. Each end of the corridor is anchored by significant public uses; on the west, the Georgia World Congress Center, and on the east, the Boisfeuillet Jones Atlanta Civic Center. The study area's relationship to the Central Business District can also be seen, as can the position of adjacent residential neighborhoods – Centennial Place, Herndon Homes, Vine City and portions of SoNo. At the approximate center of the area are two large districts in flux – the many surface parking lots that constitute Centennial Hill, and the site of the new Georgia Aquarium and World of Coca-Cola complex. Just as the JSA Concept Plan provides the underlying rationale for this study, the development of the Aquarium and the relocated World of Coca-Cola give it a sense of immediacy.





JSA McGill LCI Plan



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Study Area Aerial View

Figure 1.2



1.2 Demographics

The JSA-McGill study area has seen significant changes in its physical form, housing stock and demographic profile since 1990. Most of the change since 1990 was associated with the 1996 Olympic Games including the mixed-income redevelopment of Techwood/Clark Howell Homes to Centennial Place and the wholesale demolition of underutilized commercial property to create Centennial Olympic Park. Now, the Georgia Aquarium and World of Coca-Cola attractions on previously vacated land continue to dramatically change the landscape. On the west end of the corridor, new parking and truck marshalling space for the Georgia World Congress Center removed a large district of existing housing. And on the east, new housing has replaced either underutilized buildings or surface parking. Yet although change is clearly visible to the casual observer, it is not as easy to quantify because the size and shape of the study area does not neatly coincide with the four census tracts – 18, 19, 21 and 22 - it bridges.

Bearing in mind the relationship between study area and the Census tracts, it is useful nevertheless to note some trends occurring in the larger neighborhood between 1990 and 2000. Population has increased by 720 persons or 8.6%, despite demolition of housing units in the area. Tracts 18 and 19, both east of Williams Street, increase by over 1,000 and 1,500 persons respectively. Tracts 20 and 21, both west of Williams, lost population by 1,100 and 730 persons respectively. This locational shift in population is validated by the demolitions occurring in tracts 20 and 21, and the conversions and new construction in 18 and 19. Overall, the population increased at a greater rate than the 5.39% experienced by the city overall (Table 1.1).

	1990	2000	% Change	Atl. 1990	Atl. 2000	% Change
Persons	7,632	8,352	8.62%	394,017	416,474	5.39%
Households	3,431	4,508	23.89%	155,752	168,147	7.37%
Housing Units	4,121	5,198	20.72%	182,754	186,925	2.23%
Avg. Household Size	2.47	1.83	-35.05%	2.53	2.30	-9.99%
Owner Occupied	13.03%	19.85%	6.83%	NA	73,473	NA
Renter Occupied	86.97%	80.15%	-6.83%	NA	94,674	NA
Vacant	1.60%	2.46%	0.86%	5,143	5,620	8.49%

Table 1.1 – general demographic trends for census tracts 18, 19, 21 and 22 compared with Atlanta trends

Housing units and the total number of households also both increased at a much greater rate in the four census tracts than in the city overall. Over 1,000 housing units were added to the area, an increase of almost 24% over the decade; however, this was not a net positive gain distributed evenly throughout the tracts. Tracts 18 and 19 rocketed with almost 2,000 new units built since 1990 while tracts 21 and 22 lost over 700 units. This coincides with the population trends; the 281 units lost in Tract 21 correspond to the land clearance for Centennial Olympic Park and the Coca-Cola Olympic Village, and the 443 units lost in tract 22 parallels the Georgia World Congress Center demolitions along Northside Drive.

Moreover, redevelopment of Techwood Homes into Centennial Place added 1000 units to the housing stock of tract 19, and developments such as 450 Piedmont and Renaissance Lofts boosted housing counts in tract 18 by 802 units. This hypothetical 'replacement' of aged and dilapidated single-family housing by new residential mid- and high-density product is probably reflected in the housing vacancy rate as well. The tract area increased in vacant housing (straight vacancy; does not include property transitioning between occupants) by less than 1%,

well below the 8.5% increase in the city. Condemnations or abandonments may have continued in other areas of tracts 21 and 22 considering other commercial redevelopment projects like the Northyards business park; concurrent housing demolition may have limited vacancies to the marginal rate.

The jump in households was matched by the radical decline in average household size. While in the city as a whole, household size decreased by 10% over the decade, it decreased by over three times that in the tract area. The factor of three applies to the discrepancy between the tract area and the city in number of households as well. The significance of this gap is that while the larger demographic shift of families away from the city to the suburbs is balanced by a returning population of young singles, couples and empty-nesters, in the tract area this trend is highly pronounced. Again, considering the redevelopment of Techwood Homes, a sizeable population of large families – either immediate with children or extended with live-in relatives – may have been relocated to other Atlanta Housing Authority properties or neighborhoods in the city; a significant portion of the population occupying Centennial Place now are single and married students attending Georgia Tech.

The phenomenon of urban families (often poor) and the elderly, many of whom are residents of public housing, being replaced by a younger or more affluent population is partially confirmed by the shift in age that occurred in the tract area between 1990 and 2000. Decreases in population over the decade occurred in the age brackets of 17 years and below, and 70 years and above (Table 1.2, light yellow).

	1990 Aggregation	1990 % Total	2000 Aggregation	2000 % Total	% Change 1990-2000
Under 5 years	833	10.91%	590	7.06%	-3.85%
5 to 9 years	572	7.49%	429	5.14%	-2.36%
10 to 17 years	676	8.86%	430	5.15%	-3.71%
18 to 21 years	400	5.24%	445	5.33%	0.09%
22 to 29 years	1,237	16.21%	1,629	19.50%	3.30%
30 to 39 years	1,496	19.60%	1,739	20.82%	1.22%
40 to 49 years	797	10.44%	1,207	14.45%	4.01%
50 to 59 years	446	5.84%	762	9.12%	3.28%
60 to 69 years	476	6.24%	551	6.60%	0.36%
70 to 79 years	441	5.78%	354	4.24%	-1.54%
80 to 84 years	144	1.89%	122	1.46%	-0.43%
85 years and over	114	1.49%	94	1.13%	-0.37%
Totals	7,632	100.00%	8,352	100.00%	

Table 1.2 – trends in age for census tracts 18, 19, 21 and 22

While part of this is explained by age cohorts moving on to the next bracket or dying, the key ages of below 10 and 70-80 declined significantly indicating that families with young children and retirement-age seniors were looking for housing elsewhere. On the flipside, major increases occurred in population aged between 22 and 29, and between 40 and 60 (Table 1.2, light orange). This clearly corresponds to the notion of young singles and couples – possibly professionals – and empty-nesters replacing the very young and the old. Looking also at the shift in tenure over the decade, a decrease in area rentals is offset by an equal increase in owner-occupied housing. This supports the contention that the area has changed from low- to middle-income groups dependent on rental housing to those with higher incomes – essentially gentrification. This trend is emblematic of the demographic transformation in the entire corridor given the changes visible in the built fabric.

A look at one final demographic measure for the census tract area shows another kind of shift. While the racial makeup of the area is still majority African-American, there was a 16% drop in this racial group and a 26% increase in whites (Table 1.3). Considering that whites constituted less than one-quarter of one percent of the population in 1990, the jump to over 25% in 2000 is very significant. It shows clearly the transition from the 'sixties and 'seventies stereotypical 'inner-city' neighborhoods to the gentrified postmodern downtown of the 'nineties. It bears keeping in mind that in these census tracts, the vehicle of change was rapid and purposeful redevelopment and not a slower, more random process.

	1990	2000	% Change
White	0.16%	26.40%	26.24%
Black	84.50%	68.45%	-16.05%
American Indian, Eskimo or Aleut	0.16%	0.23%	0.07%
Asian or Pacific Islander	1.59%	2.67%	1.08%
Other	0.29%	2.25%	1.96%

Table 1.3 – trends in race for census tracts 18, 19, 21 and 22

Although the demographic analysis above is based on census tracts incorporating a larger area than the JSA-McGill LCI corridor, quantifying the existing development and applying a household size multiplier gives an idea of the total population and employment in 2003. The calculations for these are based on survey counts of residential units and workers within the study area. This methodology has been used to achieve a somewhat more accurate count of the existing population, since the 2000 Census does not reflect developments completed subsequently, the majority of which make up a large number of the housing units within the study area. The figure below indicates that the corridor roughly contains 2,400 residents and employs over 15,000 people. Significant employers include SunTrust, the federal government and the other office uses in the Peachtree Summit building and SunTrust Plaza. Other employers include small commercial establishments along Marietta Street and Peachtree Street in addition to the hotel and civic uses in the corridor.

Population¹	Housing Units	Average Household Size²	Employment in Jobs³
2,404	1,202	2.0	15,564

Table 1.4 – Population and employment approximations for the JSA McGill LCI study area

¹ Assuming 100% occupancy rate

² Average Household size calculations based on Zimmerman Volk and Associates' estimation for 2003.

³ Employment calculations assume 250 SF/person for office, 350 SF/person for retail and 1000 SF/person for hotel and 250 SF/ hotel room – employment estimates per ZHA Inc.

1.3 Existing Land Use

The JSA-McGill study area is made up of about 329 parcels covering approximately 145 acres of land. It is surrounded by the Downtown hotel district, the central business district and residential neighborhoods. Figure 1.3 shows the existing land use within the study area, which were assessed through a windshield survey. The land use categories derived for this study are a compilation of the City of Atlanta's land use classification system and Fulton County's land use categorization. The calculations are based on parcel level data compiled by the City of Atlanta.

Commercial uses are subdivided into three categories based on density and building height and make up about 12% of the land use in terms of acreage. The character of commercial development changes from the low-density historic Marietta Street commercial district on the west to office towers like the SunTrust Plaza and Peachtree Summit on the eastern side of the study area. Though not a part of the study area, major office complexes like the Coca-Cola campus and the Inforum/Apparel Mart surround the JSA-McGill corridor emphasizing its proximity to the Downtown business district core.

Institutional uses dominate the corridor with the Boisfeuillet Jones Atlanta Civic Center and Georgia World Congress Center occupying about 29 acres of land. Historic churches like the Sacred Heart Catholic Church and First United Methodist Church contribute to the changing façade of Peachtree Street. The Crawford Long Hospital is another large institutional use located on the northeastern edge of the study area, at Peachtree Street and Ralph McGill Boulevard, adjacent to the Downtown Connector.

The study area has only about 0.5 acres of public open space which includes two pocket parks – Hardy Ivy Park at the intersection of Peachtree Street and West Peachtree Street and Mayor's Park at Peachtree Street and Ralph McGill Boulevard by the Downtown connector. Private plazas like the SunTrust Plaza and St. Luke's park add to the stock of open space in the study area. Private and public open spaces combined provide less than 2% of the total acreage within the study area. This lack of usable open space is somewhat compensated by two large urban parks, Centennial Olympic Park and Renaissance Park that surround the corridor. Centennial Olympic Park, a 19-acre urban civic space lies south of Baker Street providing Downtown with a large public gathering space, but few amenities for residents in the area. Renaissance Park, north of the corridor mainly serves the Central Park community as a neighborhood park and is not very accessible from much of the study area. Furthermore, these two parks anchor the east and west sides of the corridor creating a need for a large public open space in the central core of the study area.

A wide variety of residential uses are scattered throughout the study area. Downtown Atlanta has seen a trend of increasing new residential activity which is evident through the construction of two new high-rise residential towers like Centennial House and Museum Tower. Marietta Street has more historic loft housing appropriately adjoining the railroads. The eastern side of the corridor covers a small part of the Renaissance Park neighborhood and includes two residential complexes – 450 Piedmont Avenue and Renaissance Lofts.

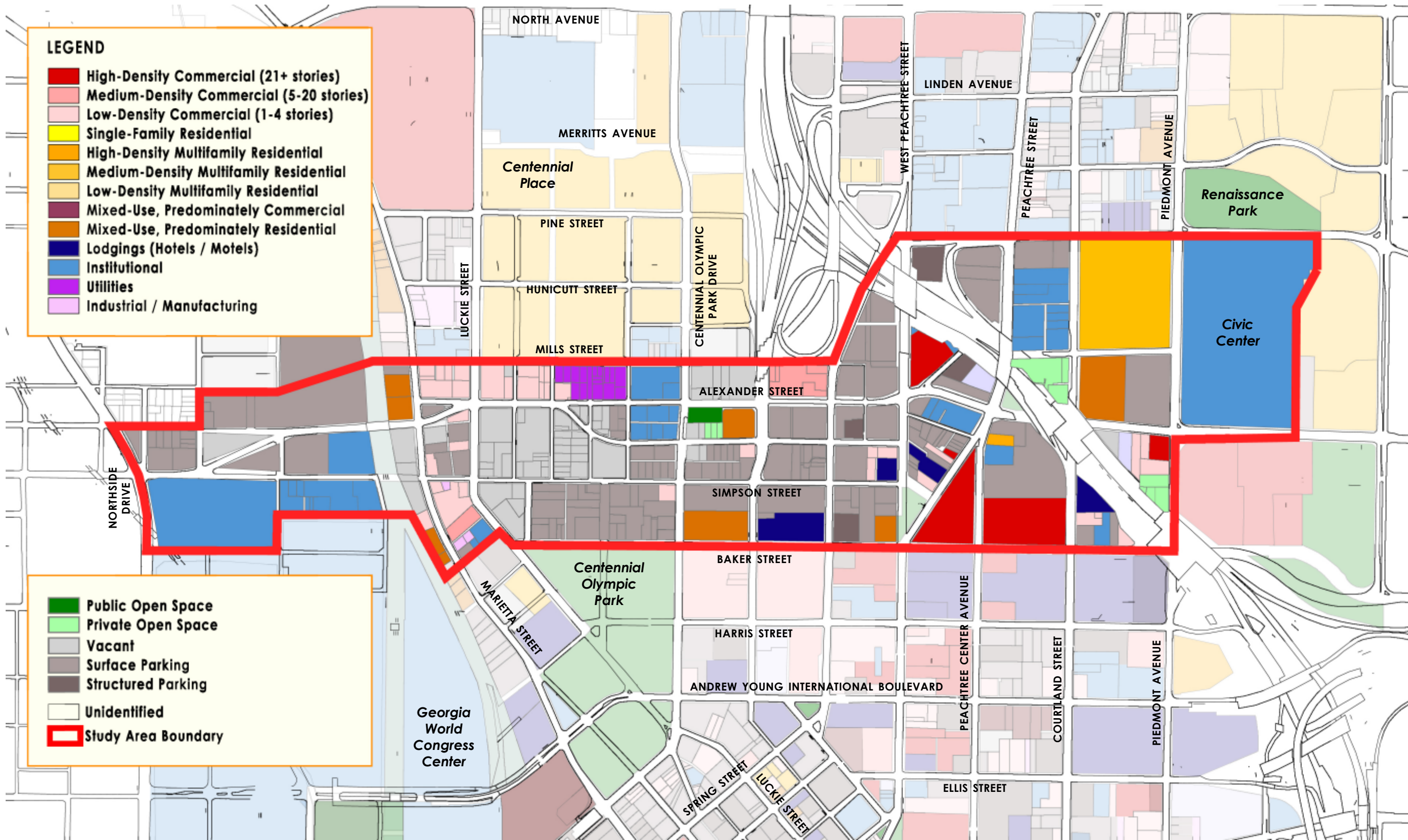
Finally, an astounding 64 acres, nearly 43% of the study area, is either vacant or occupied by surface parking lots. About 20 acres of this vacant/surface parking land is to be occupied by the new Aquarium (presently under construction) and planned World of Coca-Cola. However there remain large concentrations of surface parking lots located between Centennial Olympic Park Drive and West Peachtree Street (in an area known as Centennial Hill) which provide the greatest development opportunities in the study area.

Table 1.5: JSA-McGill LCI Existing Land Use*

Land Use Type	Number of Parcels*	% of Total Parcels	Acreage	% of Total Acreage
Commercial High Density	5	1.52%	7.63	5.24%
Commercial Low Density	37	11.25%	7.64	5.24%
Commercial Medium Density	6	1.82%	2	1.37%
Industrial	4	1.22%	1.8	1.24%
Institutional	34	10.33%	37.42	25.69%
Lodging	4	1.22%	3.1	2.13%
Mixed-Use Predominately Residential	8	2.43%	6.73	4.62%
Multifamily High Density	1	0.30%	0.25	0.17%
Multifamily Medium Density	1	0.30%	8.47	5.81%
Public Open Space	1	0.30%	0.45	0.31%
Private Open Space	11	3.34%	2.23	1.53%
Parking Deck	4	1.22%	2.15	1.48%
Surface Parking Lot**	135	41.03%	50.29	34.52%
Utility	18	5.47%	1.78	1.22%
Vacant	60	18.24%	13.74	9.43%
Total	329		145.68	

* Based on City of Atlanta's parcel data and Fulton County Tax records

** Includes only parcels used solely for parking purposes



- LEGEND**
- High-Density Commercial (21+ stories)
 - Medium-Density Commercial (5-20 stories)
 - Low-Density Commercial (1-4 stories)
 - Single-Family Residential
 - High-Density Multifamily Residential
 - Medium-Density Multifamily Residential
 - Low-Density Multifamily Residential
 - Mixed-Use, Predominately Commercial
 - Mixed-Use, Predominately Residential
 - Lodgings (Hotels / Motels)
 - Institutional
 - Utilities
 - Industrial / Manufacturing

- Public Open Space
- Private Open Space
- Vacant
- Surface Parking
- Structured Parking
- Unidentified
- Study Area Boundary



JSA McGill LCI Plan

1.4 Existing Building Condition and Occupancy

A windshield survey of building conditions and occupancy of both residential and non-residential buildings allows a better understanding of the overall state of repair in the study area (Figure 1.4). The survey also helps in identifying concentrations of buildings that are unoccupied or in a state of disrepair which would warrant a more detailed study of that area. The evaluation of the buildings was restricted to the exterior and assessed based on the condition of the foundation, siding, roof, windows etc. The planning team conducted the survey using four categories to define building conditions:

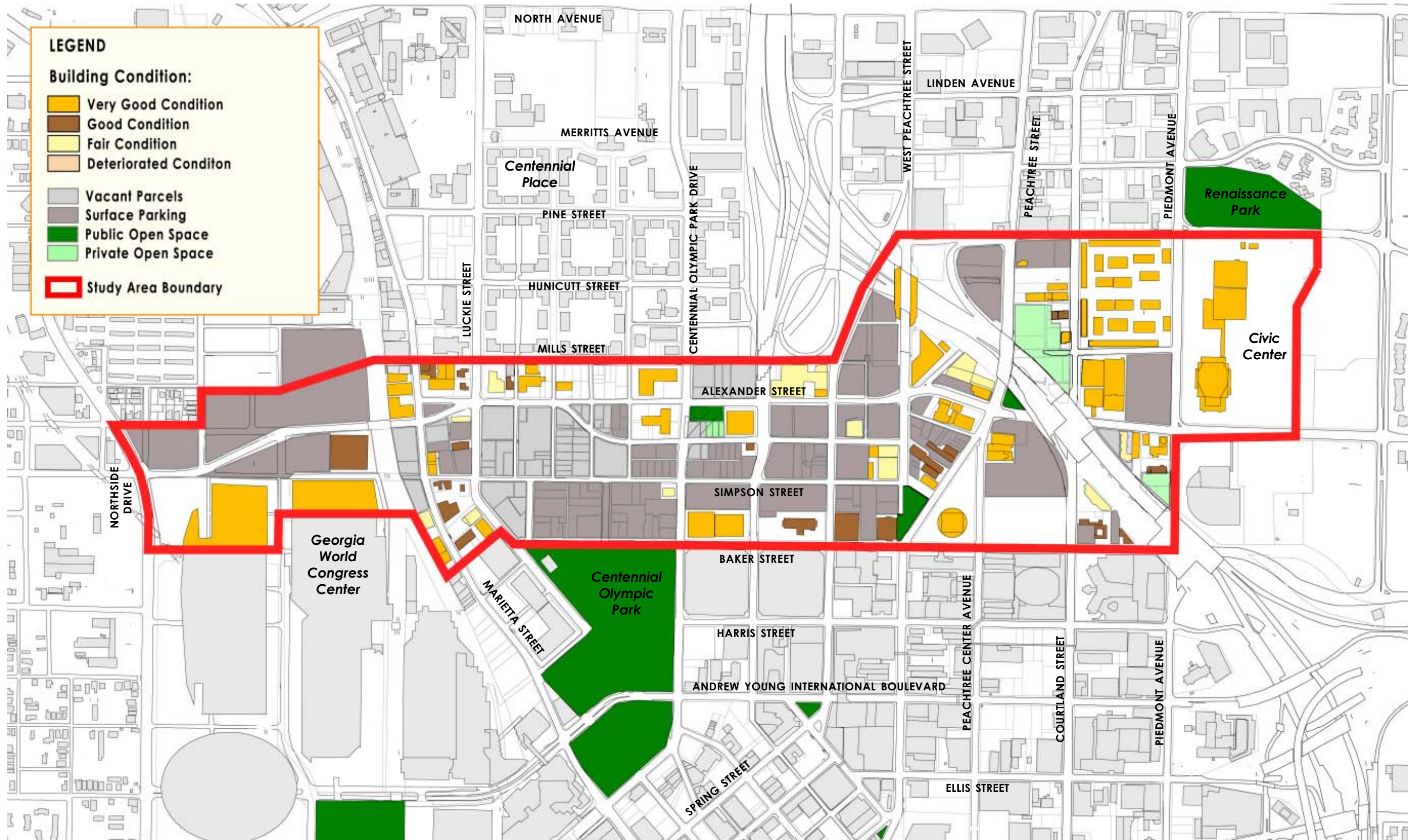
- **Very Good Condition/ Minor Defects**
Good condition, may require minor repairs
- **Good Condition / Moderate Defects**
Minor rehabilitation needed
- **Fair/ Major Defects**
Major rehabilitation needed
- **Deteriorated / Public Safety Hazard**
Extensive rehabilitation necessary, may require demolition

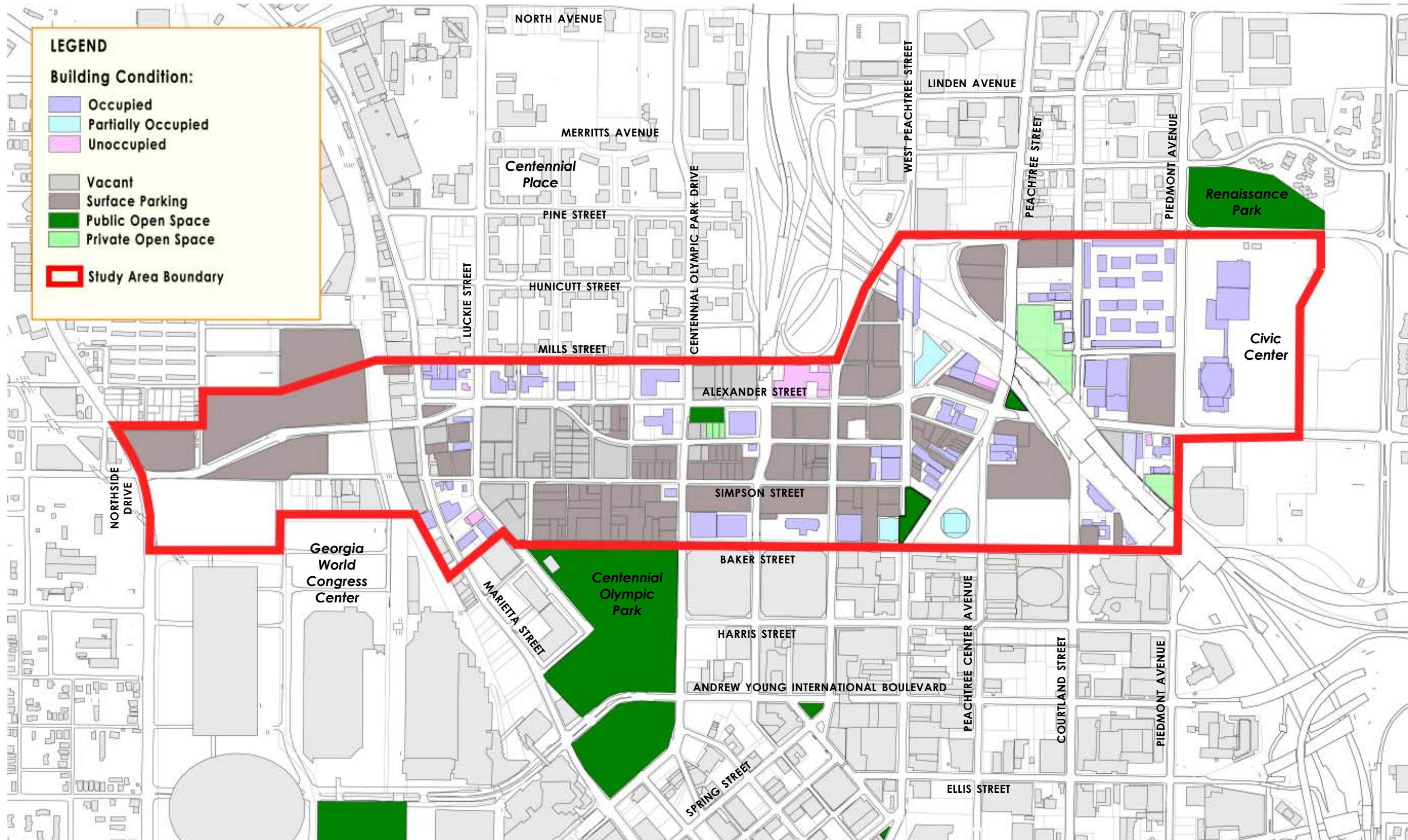
Over three-fourths of the buildings in the study area are found to be in **very good** condition. They include most of the institutional uses like the churches and cultural venues like the Boisfeuillet Jones Atlanta Civic Center. The corridor includes a large number of recently constructed residential towers and high-rise offices which come within this category. Buildings found to be in **good** condition are mostly smaller commercial establishments along Marietta Street, Baker Street and Peachtree Street. They require minor repairs like new windows/doors etc or exterior paint. Very few buildings are found to be in **fair** condition which would require some structural rehabilitation and renovations. Some of the historic buildings in the study area like the Medical Arts Building fall into this category. There are no **deteriorated** buildings in the study area which would require major rehab or demolition.

Building occupancy was also assessed based on a visual survey (Figure 1.5). The following designations describe the standards used to make the determinations:

- **OCCUPIED**
This designation is based on clear evidence of habitation by legitimate occupants, such as cars parked in the driveway/parking lot, curtains in the windows, the presence of deliveries such as mail or newspapers, retail business signs, etc.
- **PARTIALLY OCCUPIED**
This designation is used in cases of multifamily dwellings or larger office buildings. As above, it is based on evidence of habitation by legitimate occupants and uses the same criteria.
- **UNOCCUPIED**
This designation is based on clear evidence of the lack of legitimate occupants. The evidence includes an obviously unoccupied for-sale or for-rent dwelling or structure, missing or broken doors or windows, clear dilapidation, boarded openings, etc.

A majority of the buildings in the study area are occupied. The unoccupied buildings include the Boomershine building (under renovation at the time of the survey) and the Medical Arts Building. Some of the high-rise office towers like the SunTrust Plaza and Peachtree Summit were evaluated to be partially unoccupied based on office occupancy data in Downtown Atlanta (Occupancy rate less than 90%).





LEGEND

Building Condition:

- Occupied
- Partially Occupied
- Unoccupied
- Vacant
- Surface Parking
- Public Open Space
- Private Open Space
- Study Area Boundary



Existing Building Occupancy

Figure 1.5



1.5 Urban Design Framework

The preceding sections have described existing conditions in the study area based on survey and regulatory data. But beyond parcel level analysis, each area has perceptual characteristics which are more subjective and hard to quantify. These characteristics include sub-districts within the study area, connections that unify these districts and individual buildings that contribute to the overall character (Figure 1.6). For the purpose of this study the urban design framework is based on two characteristics – the elements that distinctly contribute to the urban environment and the connections that create the links between these elements.

Urban Elements:

There are several unique "Urban Elements" that contribute the overall character of the JSA-McGill corridor including historic districts/nodes, historic structures, and cultural/civic destinations. In particular, there is an historic node of development centering on the intersection of Marietta and Luckie in which some former warehouses associated with the railroads have been adaptively reused as loft residences and offices. There are also several historic structures considered as 'contributing buildings' by the Atlanta Urban Design Commission scattered throughout the corridor (although they are not numerous). In particular, a group of historic buildings including the Medical Arts Building, the Imperial Hotel, the Sacred Heart Catholic Church and First United Methodist Church create a node of historic resources on Peachtree Street where it spans the interstate. Several large and small scale civic/cultural destinations further provide a sense of character to the corridor including the Civic Center, Georgia World Congress Center, the 'Imagine It' Children's Museum etc. Taken individually, these disparate elements each lend their own defining characteristics and "sense of place." However, for the most part, they operate independently and locally in specific "nodes" or "districts" and do not add up to an overall unified sense of place for the entire corridor.

In terms of density and its corresponding impact on "urban character," the corridor is once again divided into distinct districts. Peachtree Street is characterized by high density mixed use buildings creating an urban environment. This density tapers down as the corridor transitions into the neighborhoods like Vine City on the west and Central Park on the East. These variations in densities once again add to the discontinuous character of the corridor. Thus, the study area feels more like a series of districts linked by a transportation connection.

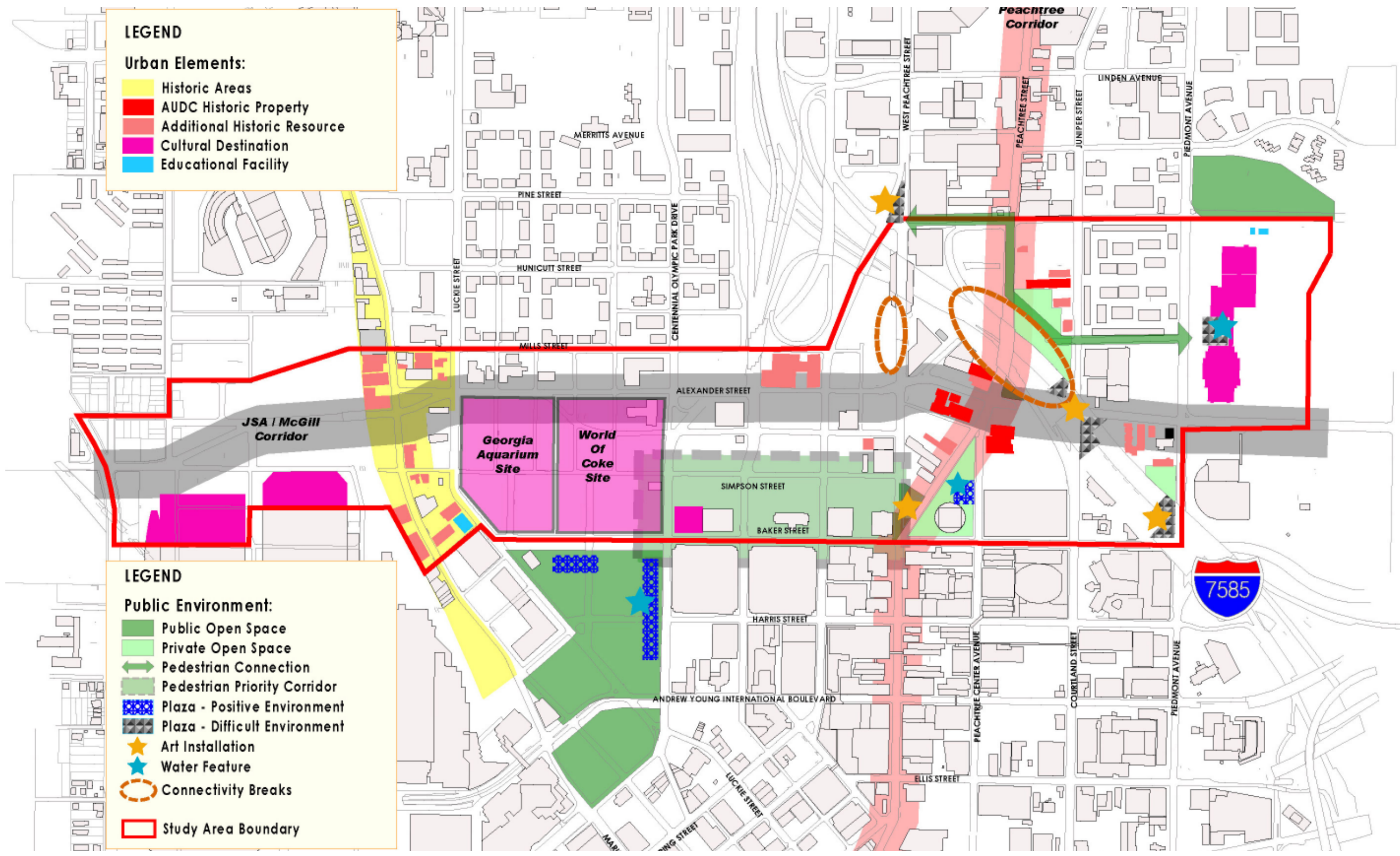
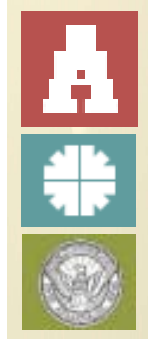
Public Environment:

The public environment includes open spaces like parks and plazas along with the connections that link these spaces. The study area is dotted with pocket plazas featuring public art and water features. Some spaces like Hardy Ivy Park and SunTrust Plaza contribute to the character of the place by acting as gateways into Downtown while others especially the Folk Art parks which span the interstate at Ralph McGill Boulevard need better maintenance. In terms of the complete corridor, these public spaces/art installations are few in number and do not create a major impact in the study area. The western side of the corridor has an opportunity for more open space or public art especially along the Marietta Street artery.

The pedestrian environment needs immediate attention. Sidewalks along most of the internal streets are in a state of disrepair, thereby discouraging pedestrian activity. This lack of connectivity is a deterrent to the usage of the large number of public transit facilities like the Civic Center MARTA station and MARTA bus routes. Topographical challenges in the corridor also add to the difficult pedestrian environment. Peachtree Street is located on a ridge and the land slopes down substantially west of Williams Street. Walkability between the MARTA station

and the Aquarium could also be impaired by substantial grade changes. The Civic Center MARTA station was located to support the Civic Center, hence this connection needs to be enhanced and improved. The hostile vehicular environment along West Peachtree Street and Spring Street, both high speed one-way roads affects the usability of the MARTA station.

Perhaps the largest physical and psychological barrier to pedestrian movement is the Interstate highway which bisects the study area. Significant attention will have to be paid to this area in order to create a walkable and livable corridor.



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 Prepared by: Urban Collage, Inc. in association with
 Cooper Carry, URS Corp., HPE, ZVA, ZHA, Verge Studios, Biscuit Studios & PEQ

Urban Design Framework

Figure 1.6

1.6 Zoning Framework

The City of Atlanta regulates the development of all real property through the use of zoning, which legally controls the use, height, density, setbacks, parking, etc. Central Atlanta Progress along with the City of Atlanta is currently reviewing and updating the zoning code for Downtown Atlanta. About two-thirds of the study area is a part of this new district boundary. The following discussion describes both the current zoning and the proposed zoning.

Current Zoning:

Special Public Interest (SPI-1) District: This district governs zoning in most of the Downtown Core. With reference to the study area; the parcels east of West Peachtree Street are included in this category. The district allows a high non-residential density with a FAR (Floor Area Ratio) of 25 (which signifies that the total floor area will not exceed an amount equal to 25 times net lot area) along with a smaller percentage of residential uses (FAR of 6.4). These high densities have inflated land values and therefore indirectly discouraged development. Large surface parking lots occupy many parcels zoned SPI-1 within the study area.

SPI-13 District: This district was created in 1998 to enhance and protect Centennial Olympic Park as an Olympic legacy and maintain its character as a civic space. The intent was to create a mixed-use pedestrian-friendly district that would enhance the area around the park. SPI-13 occupies the area north of Centennial Olympic Park and bounded by West Peachtree Street on the east and the railroads on the West. Along with permitted uses, the district also has special regulations for sidewalks and parking requirements.

Central Business Support District (C-5): The intent of this zoning category is to allow for moderate-to high-intensity uses of a broad range in mixed use type development. This category allows a lower density for non-residential uses (FAR of 10) as compared to the SPI-1 district. Within the study area, the blocks between Courtland Street and Piedmont Avenue south of Currier Street are zoned C-5. Also, the area west of the railroads and south of Alexander Street is zoned under the same category.

Central Area Commercial Residential District (C-4): This district is tailored to provide moderate to high-intensity uses that support development in the Downtown core. The objective is to have a mix of high-rise residential, office and mixed use developments. Permitted uses include commercial and retail uses like banks, restaurants, dry cleaners, along with institutional, cultural and educational uses. Multifamily dwellings are permitted. The Civic Center block is the only area zoned C-4 within the study area.

Heavy Industrial District (I-2): I-2 occupies the land west of the railroads and north of Alexander Street. The parcels within this category are mostly owned by the Georgia World Congress Center and are a part of their Phase V expansion plans. Permitted uses include all commercial and industrial uses and storage facilities. Dwelling units are only permitted if they are clearly incidental to the primary use.

Proposed Zoning:

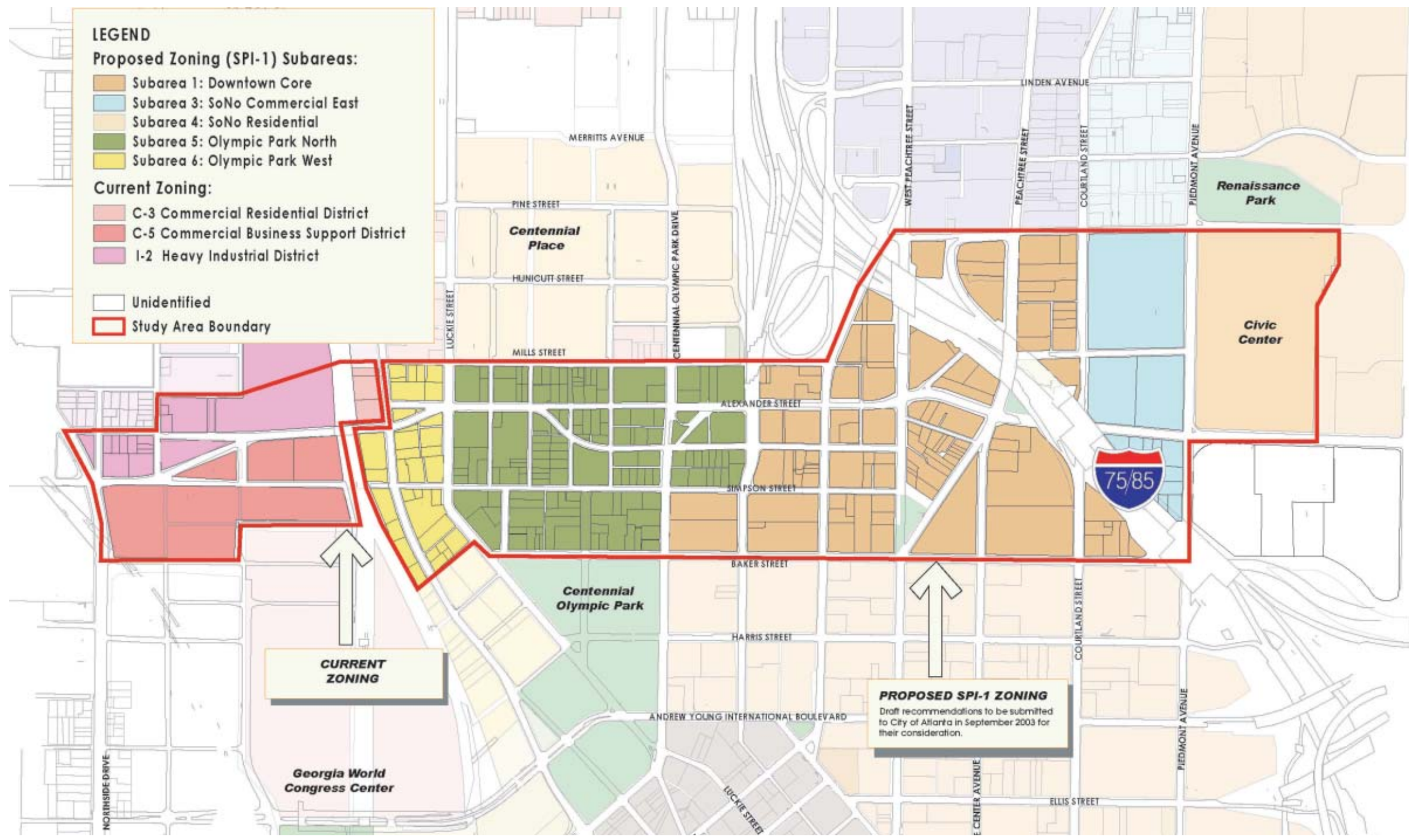
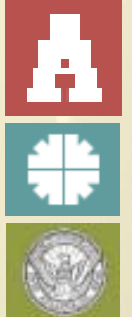
As mentioned above, a process to update the zoning code for Downtown is currently underway. This proposed zoning applies to the area east of the railroads within the study area. SPI-13 and SPI-1 have been consolidated to create a unified Downtown zoning district. SPI-1 is divided into eight subareas with regulations specific to their use and character. Figure 1.7 represents this proposed zoning.

Proposed SPI-1 District: The goal is to create a more pedestrian-friendly, mixed-use environment in Downtown with special incentives to encourage housing. The proposed code is currently under review by the City of Atlanta and interested stakeholders. It recommends an increase in the residential density while maintaining the non-residential FAR. Special incentives are provided for developing new housing and pedestrian-oriented retail. The intention of this update is to provide a 24 hour urban environment within Downtown. Peachtree Street and Marietta Street have been identified as 'Storefront Streets' where active ground floor uses are required for a depth of 20' - the elevation must be 65% clear glass, fenestration of storefront character. Along with new development controls for bulk and density, the proposed code also includes supplemental development standards which will guide the character of the built environment and public realm. The following SPI-1 subareas will govern the zoning in the study area:

Proposed Subarea 1 – Downtown Core: This subarea allows high density commercial and residential encouraging a compatible mix of uses. Without reducing the non-residential FAR of 25, this subarea increases the residential FAR to 21.4 (when in conjunction with the Affordable Housing Bonus) with a maximum FAR of 35. With reference to the study area, parcels between Williams Street and Courtland Street are within this subarea.

Proposed Subarea 4 - SONO Residential: The Civic Center block is included within this subarea. The intent is to protect the character of the increased residential development designated in this area. With a larger FAR for residential uses (6.8) and non-residential FAR of 3.8, the district permits neighborhood oriented commercial uses that would support residential development.

Proposed Subarea 6 – Olympic Park West: This subarea is reminiscent of the original SPI-13 subarea which allows an equal mix of residential and non-residential uses. Designated for the area around Marietta Street, the zoning enhances the trend of medium density mixed-use development compatible with the historic railroad character of the street.



1.7 Existing Transportation & Circulation

Transportation and circulation issues are of great importance to this study as the focus is directed towards pedestrian and vehicular movement on Jones-Simpson-Alexander-McGill along with connectivity around the Civic Center MARTA station. Figure 1.8 illustrates these and other transportation issues which are crucial to bringing new development into this corridor. The map analyzes three circulation aspects – the existing street hierarchy, the vehicular network and the pedestrian network.

Street Hierarchy:

The analysis of the street hierarchy is based on the street widths, sidewalk widths, existing development character and vehicular speeds. The study area has the following categories of street types:

Thoroughfares: Courtland Street, Piedmont Avenue, Centennial Olympic Park Drive, Williams Street, Spring Street and West Peachtree Street are classified as Thoroughfares. These streets carry large volumes of vehicular traffic and are directly connected to the interstate system. Thoroughfares within the study area are mostly one-way pairs that currently contribute to the smooth flow of vehicular traffic within Downtown.

Avenues: These are destination oriented 'main streets' heavily traveled by pedestrians. Peachtree Street, Luckie Street and Marietta Street could be categorized as Avenues within the study corridor. They generally coincide with MARTA routes and are designed for reduced speeds. Avenues are usually two lanes in each direction and may have on-street parking.

Minor Streets: Streets like Baker Street and Alexander Street (east of Centennial Olympic Park Drive) may be minor streets which complete the grid for avenues and thoroughfares. They are one lane in each direction and may have an additional on-street parking lane.

Neighborhood streets: Similar in structure to minor streets, neighborhood streets are located in residential areas. They are created to control vehicular speeds to allow smooth pedestrian movement. The grids of streets inside the Centennial Place residential area (Mills Street, Hunicutt Street, and Pine Street) are examples of residential streets.

Service Streets: Downtown has a network of alleyways connected to service entrances of buildings. These service streets are usually one lane with narrow/no sidewalks. No such service streets are within the study area.

Transit, Sidewalks and Bicycle Facilities:

The vehicular grid in the corridor is reinforced by a network of transit options. Served by trains and buses, about one-third of study area is within walking distance (i.e. approx five minute walk) of two MARTA rail stations, Civic Center and Peachtree Center. Buses running along Peachtree Street, Luckie Street, Marietta Street, Alexander Street, Centennial Olympic Park Drive etc. connect the MARTA stations to residential neighborhoods and offices. The City's 'Commuter On-street Bike Plan' identifies Luckie Street as a potential bike path connecting Georgia Tech to Downtown. The JSA-McGill corridor has also been identified for a proposed bike path connecting to the Freedom Parkway trail.

Although the corridor has a good network of streets, sidewalks in certain parts are in substandard condition. As described in the urban design section, the hilly terrain also makes

pedestrian movement difficult, which may be one of the reasons for the underutilization of the Civic Center MARTA station.

Traffic Signals:

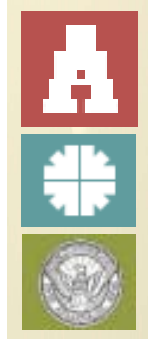
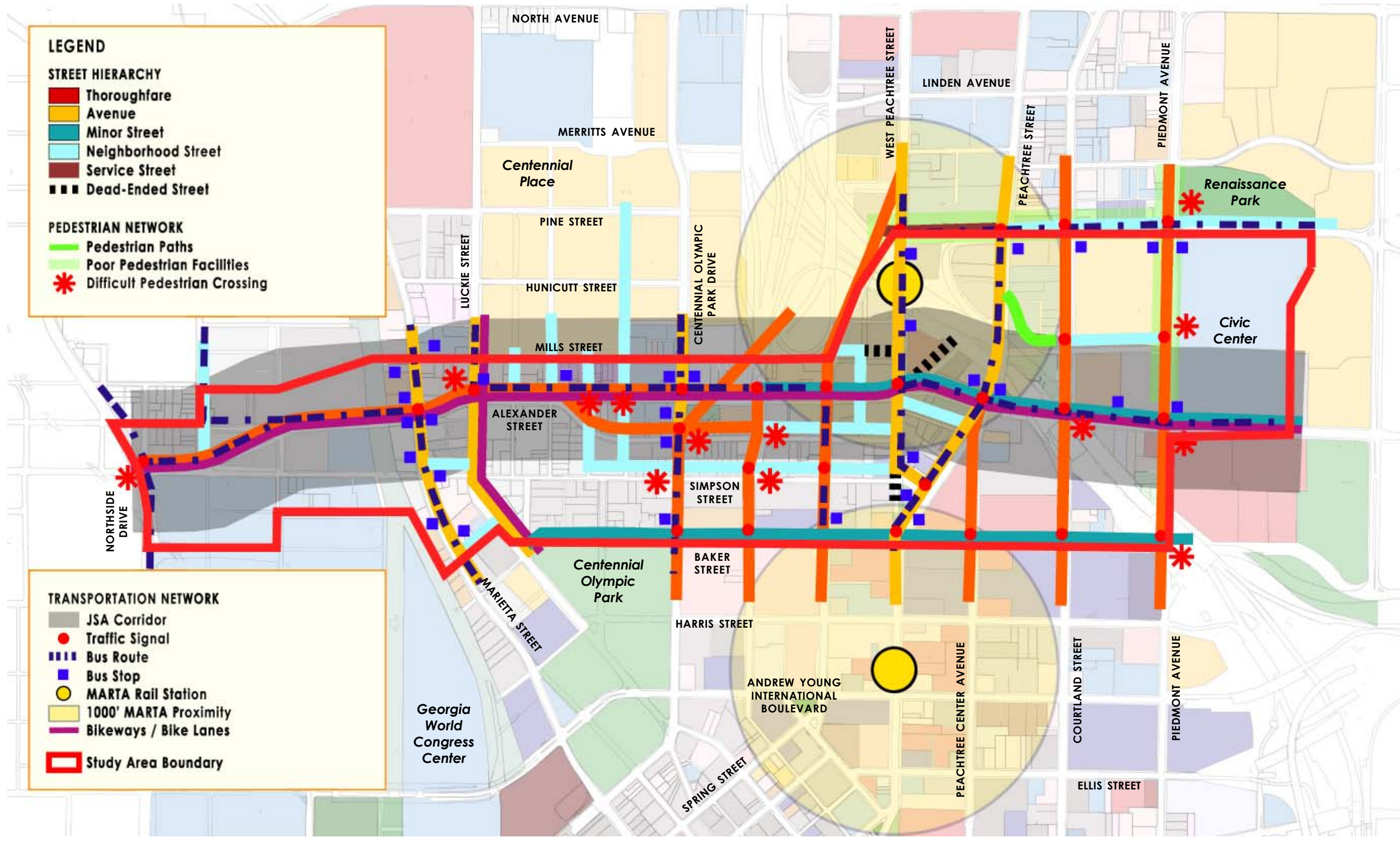
Given Downtown's complex street grid, traffic signalization and timing are an important issue in the study area. As the area develops into a mixed-use center with new office and residential uses, a detailed traffic study will be required to maintain the vehicular flow while supporting the additional pedestrian activity within the corridor.

Parking:

As described in the land use section, surface parking lots occupy nearly 50 acres of land within the study area. They are mainly concentrated between Centennial Olympic Park Drive and Peachtree Street. Some of these surface parking lots have proposals for new developments currently under review. Any plans for such new developments will require the construction of parking decks to accommodate parking needs. There are only two parking decks within the corridor - both along Spring Street.

Planned Transportation Improvements:

The Central Atlanta Transportation Study (CATS) identified the JSA-McGill corridor as a means of increasing east-west mobility through the northern portions of Downtown. The JSA-McGill corridor project, currently underway, is a collaborative effort between the City of Atlanta and Central Atlanta Progress. Plans involve converting the one-way sections of Alexander Street to a continuous two-way corridor, reconstructing and improving the entire transportation corridor between Northside Drive and West Peachtree Street with wider sidewalks, improved pedestrian access, enhanced transit mobility and bike lanes. Funding for the project is being provided by the Georgia Department of Transportation and the Georgia Regional Transportation Authority through a state bond issue, City of Atlanta bond funds, and ADID matching funds. The more detailed preliminary engineering and construction document phase of the project will begin before the end of the year with construction slated to begin fall of 2004.



1.8 Market Conditions

Housing Trends

Based on Zimmerman/Volk Associates' field investigation, analysis of migration and mobility data, and assessment of the assets and opportunities of Downtown Atlanta, new housing units within Downtown are likely to attract potential renters and buyers from elsewhere in the City of Atlanta; the balance of Fulton and DeKalb Counties; other counties in the Atlanta region; and several other Georgia counties. Additional significant draw areas include Miami, Jacksonville, and Tampa, Florida; New York City; Charlotte, North Carolina; Memphis and Nashville, Tennessee; and Dallas and Houston, Texas. This analysis also factors in all other counties represented in City of Atlanta/Fulton County migration. Downtown Atlanta and surrounding area properties included in the survey are described in the completed market study as a part of the appendix section.

From the perspective of draw area target market propensities and compatibility, and within the context of Downtown Atlanta's new housing marketplace, the potential market for new housing units within JSA-McGill LCI Study Area could include the full range of housing types, from higher-density multi-family to lower-density single-family detached. However, it is recommended that new construction within the Study Area concentrate on the higher-density multi-family housing types that support urban redevelopment most efficiently.

For the multifamily market, younger singles and couples (childless households) have been identified as the largest general market segment (about 70%). Empty nesters and retirees are the next group most likely to locate in Downtown and comprise just under 25% of the market for housing units in Downtown. This market though, is expected to grow with the increase in the number in the 'Baby Boom' generation in the next few years. The smallest market is comprised of family-oriented households.

Based on the recommended proportions of multi-family dwelling units and net densities as outlined in the optimum market position below, the JSA-McGill LCI Study Area could support, and the market could absorb, up to 1,500 new dwelling units within the next five years. This includes about 66% of rental units and 34% of for sale multi-family.

At the forecast absorption of 360 units in one year, new residential development within the Study Area would require a capture rate of 10.4 percent of the 3,450 households, identified through target market analysis, that have the potential to rent or purchase new multi-family dwelling units within the Study Area in the year 2003—a rate that is within the target market methodology's parameters of feasibility. The preferred building types include the following:

- Loft Apartment buildings (adaptive reuse of older warehouse buildings or new construction),
- Conventional apartment buildings that would relate to the urban environment, and are often combined with non-residential uses on the ground floor.
- Mansion Apartment buildings (luxury apartments) – Three or four story flexible use buildings which could accommodate both residential and non-residential uses.

Retail Trends:

The JSA-McGill LCI Study Area's retail potential will be driven by proximate markets. These markets are employees, residents, and hotel guests within easy walking distance (one-quarter mile) to the Study Area and visitors to the new Aquarium and World of Coca-Cola projects. Given the proximity of the new Atlantic Station retail center and Downtown's small share in the retail market, a regional mall may not be market supportable. Net of the existing retail supply, proximate employees, hotel guests, residents, and attraction visitors have the potential to spend over \$100 million annually. It is important to note that a small share of this market is actually new. Therefore, most of these sales occur either elsewhere in the Downtown or outside of the Downtown currently.

To capture a proportion of these sales will require that retail be clustered to create enough critical mass to draw the market to the JSA-McGill Study Area. Eating and drinking sales make up a vast majority of the retail sales potential. Moderately priced, "family" restaurants (*Macaroni Grill, TGIFridays*) appear to be lacking in the Downtown. Following the principles of an agglomeration economy, restaurants and clubs thrive in proximity to each other. The most strategic location for eating and drinking establishments is Simpson Street. This street is between the attractions and many Downtown hotels. This street is convenient to the office core, where the very large employee market resides. The street is narrow, making it potentially pedestrian-oriented. This street is also of a scale where a modestly sized development can have a major impact on the street environment. Additionally, stand alone retail will have potential on Alexander Street. Alexander is slated to become a major east-west thoroughfare. Retail will be drawn to the visibility of this location. Convenience retail (food and drug) will likely develop at this location.

The retail market consultant ZHA concludes that between 75,000 and 100,000 square feet of additional retail is likely supportable in the JSA-McGill Study Area through 2010. This projection represents a capture rate between 20 and 25 percent of net sales potential. The remaining potential will be captured outside of the Study Area. The projected JSA-McGill Study Area's supportable retail sales represent 1 percent of the City's net new retail sales potential through 2010.

Office Trends:

The JSA-McGill Study Area is well positioned for office development given its (1) location within easy walking distance to the Core of Downtown Atlanta; (2) its proximity to major public attractions such as Centennial Olympic Park, the Aquarium and World of Coca-Cola; and, (3) a significant supply of developable land. There is nothing inherently wrong with the JSA-McGill Study Area as an office investment location.

The JSA-McGill Study Area's ability to attract office development will largely depend on Downtown's competitiveness as a business location. Recent trends suggest that Downtown is struggling to, or, in fact, losing its competitive position within the metropolitan office market. Therefore, it is unrealistic to assume that office uses will rapidly absorb the available land in the JSA-McGill Study Area between now and 2010.

Instead, the conclusions regarding supportable office square feet are based on an assumption that the JSA-McGill Study Area evolves into a mixed-use sub-district with significant housing and retail/entertainment land uses. As such, office is a contributing land use, but not the dominant land use in the Study Area.

If residential development is feasible, an opportunity exists for the JSA-McGill Study Area to offer a unique Downtown office product. In portions of the Study Area, the product could be moderately priced, new office space in a non-high-rise building. Loft office product would contribute to a neighborhood environment. This type of product would target the Class-B office user, priced out of Midtown and Buckhead.

ZHA concludes that 350,000 to 500,000 additional square feet of this office product is likely supportable in the JSA-McGill Study Area between now and 2010. This is net of the *Park Tower at Centennial Hill* project. This projection assumes significant residential development in the Study Area in the near future creating market momentum and a sense that a new neighborhood is coming on-line. This projection coupled with the *Park Tower* project represents seven to nine percent of the Downtown's office development potential through 2010. The product envisioned is four to eight stories and an average size of 130,000 to 300,000 square feet. Rents would be approximately \$21.00 to \$23.00 per square foot (Class-A-/B+).

1.9 Issues & Opportunities

The JSA-McGill Corridor has several active development interests and major institutions, as well as individuals involved in previous planning studies. Early in the LCI process the team recognized the need to reach out to this wide group of stakeholders and offer them a confidential platform to express their intentions, ideas, and concerns. Fourteen stakeholder interviews were thus conducted over the course of three weeks leading up to the initial public (kick-off) workshop; some additional interviews – such as the World of Coca-Cola – predated the official launch of the LCI process. Stakeholders were encouraged to speak candidly, keeping mindful of relating their experiences to issues and opportunities for the corridor.

The results of the stakeholder interviews were summarized and compiled into an Issues Matrix (Figure 1.9) divided into seven planning categories. These “Issues and Opportunities”, as summarized below, formed the initial basis for most of the plan recommendations that are described in the Development Opportunities section. Highlights of the matrix are presented below.

Land Use and Development

The opening of the new Aquarium and the World of Coca Cola are seen as opportunities to spur more development along the corridor. Stakeholders were concerned about the need for redevelopment along Luckie Street which was now directly affected by the proposed Aquarium. Some other significant prospects were identified in the corridor which are described in detail in the ‘Development Opportunities’ section. Some discussion also focused on the location of cultural venues and moving the SciTrek Museum from its current location to a site closer to the new Children’s museum. Provision for municipal parking was seen as a potential incentive for attracting new development.

Economic Development

The office market in Downtown has seen a downturn in the last few years mostly as an effect of the slow economic market. The lessening demand for Class A office space in Downtown was a concern to some property owners.

Housing

There are ongoing development plans and strong support for new housing in the Centennial Hill area. Residential developments are key to the success of Downtown as they can help in building a 24-hour active environment. Stakeholders were concerned about secured parking options for new housing.

Historic and Natural Resources

Historic buildings along Marietta Street and resources like the Medical Arts building will likely face development pressures in the near future.

Traffic & Transportation

Stakeholders reiterated the need to understand the role of Baker Street as a transportation link, pedestrian connection and on-street parking facility. Tourist and school bus movement around Downtown Atlanta also needed solutions. Stakeholders stressed the issue of Civic Center MARTA being one of the most underutilized stations in the Downtown area.

Community Facilities

The Peachtree-Pine homeless shelter was seen as a deterrent of new development. Residents along with stakeholders identified various locations, including pocket parks and plazas which have problems associated with vagrancy and homelessness. Existing cultural spaces were identified as amenities within the area. Stakeholders saw more opportunity in providing small to medium sized exhibition space at the Civic Center.

Urban Design

Challenges of maintaining the pedestrian character of JSA while efficiently moving traffic were identified in the interview process. Stakeholders identified the need for an open space to the east of the corridor and saw a park space bridging the interstate as a potential location.

Land Use and Development	Economic Development	Housing	Historic and Natural Resources	Traffic and Transportation	Community Facilities / Social Services	Urban Design
<p>There are significant development opportunities in the corridor</p> <p>Compatible development along Luckie Street is important to the Aquarium</p> <p>Municipal parking might be used as a development incentive</p> <p>The development benefits of a TAD are offset by affordability requirements</p> <p>Long-term desirability for relocating the Georgia Power substation</p> <p>Need for retail and restaurant uses to support the large number visitors that will come to the area to visit the new and existing destinations</p> <p>City is currently underway with a long range strategic plan for the future of the Civic Center complex.</p>	<p>There is little demand for Class A office space Downtown at the present time</p> <p>There is a demand for small- to medium-sized exhibition space at the Civic Center</p> <p>Unprecedented opportunity to capitalize on energy and investment of two new world class destinations in close proximity to other existing amenities - GWCC, COP, Imagine It, Civic Center and SciTrek</p> <p>Downtown wide circulator shuttle to connect destinations to one another and to MARTA rail can help promote tourism</p>	<p>There are ongoing development plans and strong support for new housing in the Centennial Hill area</p> <p>Condominium developments require secure, dedicated parking</p> <p>Additional retail in close proximity - particularly a grocery store - would assist in development of new housing</p>	<p>Marietta Street is a historic resource but will face development pressure</p> <p>The Medical Arts Building may be renovated in the future</p>	<p>Baker Street should remain open to vehicles except for special events</p> <p>Parking on Baker Street is a potential problem due to poor pedestrian visibility</p> <p>School bus staging for the Aquarium / World of Coca-Cola requires multiple solutions</p> <p>Shuttle buses from the Georgia World Congress Center to the hotel districts will use JSA as part of a loop route</p> <p>Traffic volume and speed on Williams Street is a deterrent to pedestrian activity and creating a neighborhood in Centennial Hill</p> <p>I-75/85 access and egress needs to be improved particularly at the Williams Street and Spring Street ramps.</p> <p>The Civic Center MARTA station is severely underutilized</p> <p>Pedestrian safety near tourist venues like the Aquarium, World of Coca-Cola, 'Imagine It' Childrens' Museum etc. should be high priority.</p>	<p>The Peachtree-Pine homeless shelter is a serious problem for the area</p> <p>Renaissance Park is being used by the homeless as an encampment</p> <p>Location of Salvation Army Red Shield Lodge and Atlanta Union Mission within area can cause negative perception problems.</p>	<p>The pedestrian environment on JSA faces challenges especially at the World of Coca-Cola and the Georgia Power substation</p> <p>The Georgia Aquarium will tie into the city's wayfinding system</p> <p>An open space bridging over I-75/85 at Peachtree Street has been proposed as a civic improvement and a development catalyst</p> <p>Simpson Street may be the preferable pedestrian connection between Peachtree Street and the World of Coca-Cola / Aquarium complex</p> <p>Currently the Spring/Alexander/COP intersection is a huge disconnect in the pedestrian movement between Centennial Place and Downtown</p>



1.10 Development Opportunities

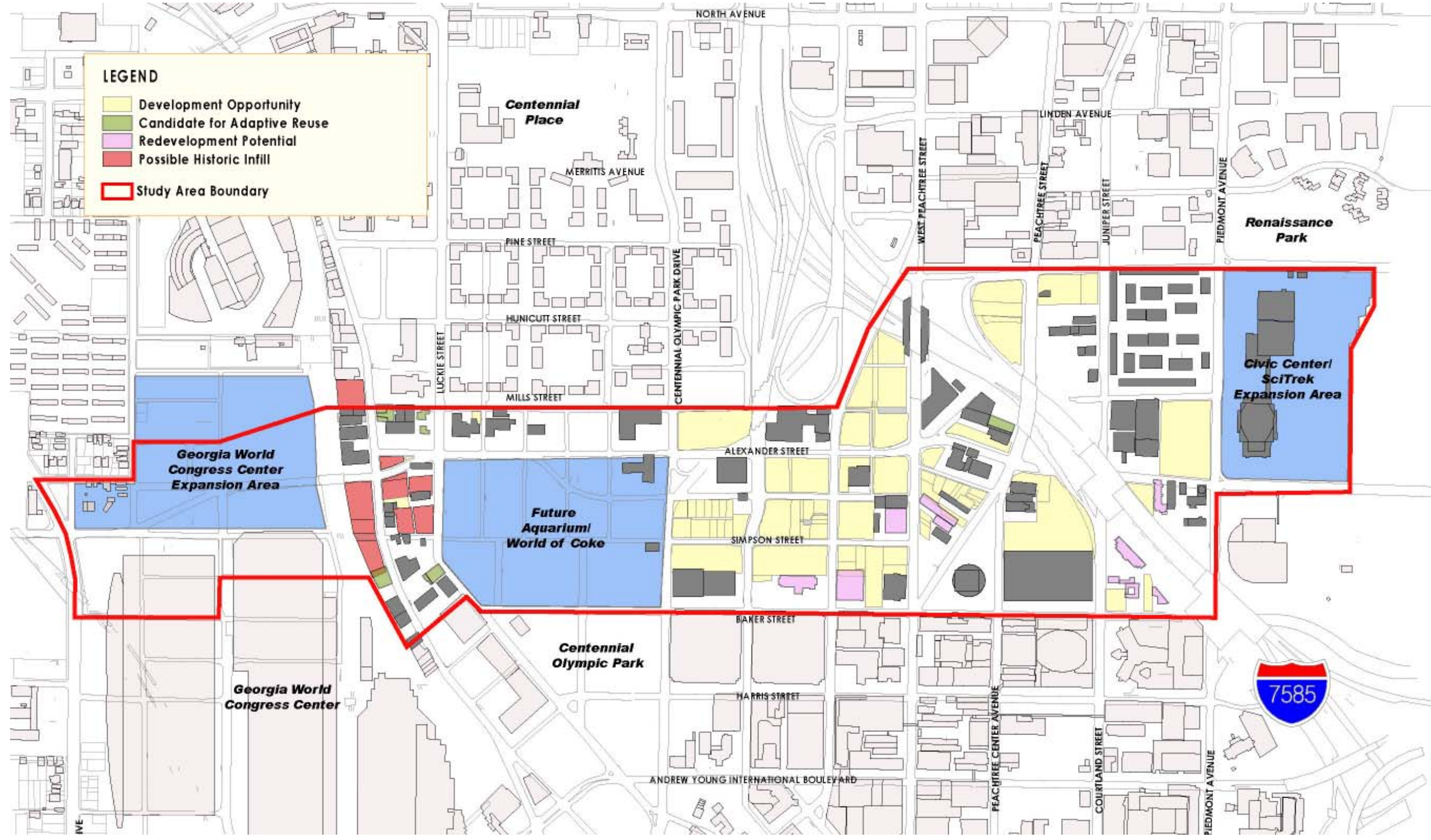
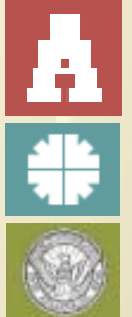
Figure 1.10 represents an assimilation of the planning team's analysis of the existing conditions in the JSA-McGill corridor. The land use, existing densities, building conditions and occupancy and the stakeholder interviews assist in understanding opportunities for new development in the corridor.

In figure 1.10 properties marked red have been identified as potential targets for historic infill. The Marietta Street artery has a stock of buildings that relate to the railroad history of the city. But intermittent vacant parcels and surface parking lots detract from the existing fabric. New development that would be compatible in terms of use and design would contribute in creating a historic mixed-use district. The map also shows properties appropriate for rehab in green color. Recent developments like the Giant Lofts and Hastings Seed Lofts have been pioneer projects for converting older buildings in the district into residential and commercial loft spaces. The local neighborhood association has also played an important role of maintaining the character of Marietta Street. Another rehab opportunity is the Medical Arts Building on Peachtree Street. Currently unoccupied, the building could add to the surrounding historic character highlighted by the Imperial hotel and two historic churches.

Land that is currently vacant or used for surface parking lots is identified as an opportunity and marked in yellow on the map. Such parcels are concentrated in the central core of the corridor between Centennial Olympic Park Drive and Courtland Street. Recent developments like Centennial House and Museum Tower have initiated a trend of high density housing on Centennial Hill. Several other projects are in various stages of planning and design which could contribute to creating a mixed-use district at Centennial Hill. The proposed Aquarium and World of Coca-Cola will also add to Centennial Olympic Park's value as a cultural venue.

The buildings marked in pink are potential redevelopment projects. They are mostly buildings that are lower in density relative to site area and/or the buildings in a state of disrepair. Within the study area, few buildings are included in this category. Some hotels like the Days Inn on Williams Street, the Best Western on West Peachtree Street and the Travelodge on Courtland could potentially be redeveloped at higher densities or for mixed use developments.

Finally large developments like the Civic Center could add density by consolidating their surface parking into decks and developing these parking lots. The Georgia World Congress Center also has plans for their Phase V project on their surface parking lots west of the railroads. The largest development that will change the character of the corridor will be the completion of the Aquarium and World of Coca Cola. These large cultural destinations are demarcated in blue in Figure 1.10.



2.0 Development Plan

- 2.1 Community Vision
- 2.2 LCI Study Area Concept Plan
- 2.3 Short-Term Priorities
- 2.4 Mid-Term Priorities
- 2.5 Long-Term Priorities
- 2.6 Corridor Development Program



JSA McGill LCI Plan

Prepared by: **Urban Collage, Inc.** in association with

Cooper Carry, URS Corp., HPE, ZVA, ZHA, Verge Studios, Biscuit Studios & PEQ

2.1 Community Vision

A significant portion of the work done on the JSA-McGill LCI study involved public participation, and this took many different forms. As part of the *Imagine Downtown* process, JSA was publicized as one of five focus areas requiring planning attention. Dates and times of all public events were posted on the Central Atlanta Progress website (www.atlantadowntown.com). E-mail comments were welcomed and encouraged. Several questions in the online 'Imagine Survey' were directed toward development in the JSA-McGill corridor. The centerpieces of the public involvement process were three public workshops; the second being a three-day long 'Charette Week' designed to build awareness and excitement through an intense set of collaborative exercises.

2.1.1 Public Workshop 1

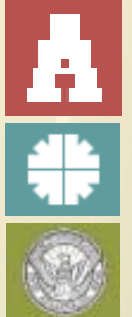
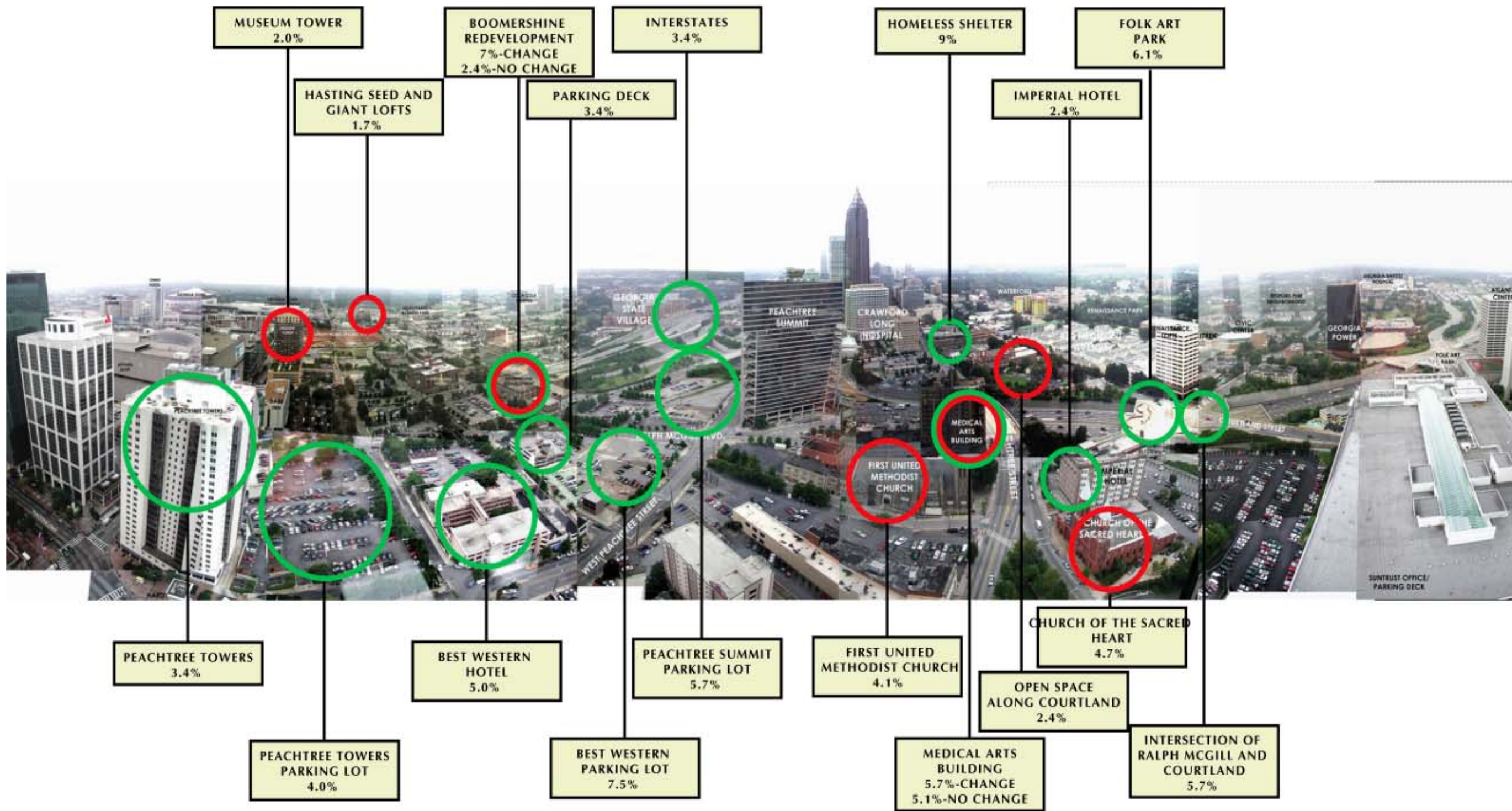
The first public workshop was held on August 19, 2003 on the 27th floor of SunTrust Tower; over 200 persons attended. The purpose was to kick off the JSA-McGill LCI process by introducing the project and the team, and to conduct interactive exercises to gauge the initial level of consensus on issues and priorities. The workshop opened with a welcome and introduction by representatives of Central Atlanta Progress, and continued with words and graphics describing the developing programs and potential impact of both the Georgia Aquarium and the World of Coca-Cola. The presentation session ended with an overview of the planning team and a description of process, schedule, and key questions framing the participatory exercises.

After some general questions were addressed, participants were encouraged to go to each of three stations to take part in both an 'issues' exercise and a 'community mapping' exercise. At each of the two community mapping stations, printed maps reproducing views from the meeting space were mounted adjacent to their respective windows. Each participant was given one red and three green dots with which they could 'vote' for priority action areas, i.e. things that they wanted to see changed or not changed; a green dot meant 'go' or a priority vote for change, while a red dot meant 'no go' or a priority vote for preservation. Participants were not limited to where they could place dots, or how many they could apply to an area. The maps were then compiled into one drawing illustrating priority action areas (Figure 2.1). Of the 'go' votes these areas ranked highest:

- Best Western building and parking lot on West Peachtree Street (12.5% of total green dots) – assumed issues with shoddiness, lack of maintenance, prominence of parking
- The Peachtree–Pine homeless shelter (9% of total) – issues with aggressive panhandling, drug distribution/ use
- The Peachtree Towers residential building and parking lot (7.4% of total) – assumed issues with appearance of building and amount and prominence of surface parking
- Boomershine building (7% of total; also gathered 2.4% of 'no go' votes) – assumed reaction to appearance of lack of maintenance, vacancy

Similarly, among the 'no go' votes, these areas ranked the highest:

- Sacred Heart Catholic Church (4.7% of total) – assumed interest in preservation of historic structure / religious institution
- First United Methodist Church (4.1% of total) – assumed interest in preservation of historic structure / religious institution
- St. Luke's park space along Peachtree and Courtland Streets (2.4% of total) – assumed affirmation of presence of green space, positive response to regular maintenance



The Medical Arts Building also received a substantial number of votes, both green (5.7%) and red (5.1%). Because of the roughly equal percentage and the historic significance of the building, it was assumed that all 'no go' votes and at least some 'go' votes were interested in preservation, the 'go' votes indicating that it could not remain in its current depressed state.

The second exercise tested community feelings regarding opportunities and challenges for the corridor. At this 'issues' station each participant was given two index cards to write a response to each of two strategic questions (Figure 2.2). The responses varied from social issues to circulation infrastructure to marketing. A sample of the perceived opportunities and challenges showed the crossover between the two categories:

- **Parking / Site Underutilization:** The prevalence of unsightly surface parking lots was a big issue for many people, but respondents also saw this as an opportunity in that the lots provide a ready vehicle for new development
- **Pedestrian Activity / Open Space / Walkability:** The generally poor or absent pedestrian environment elicited comments from several respondents as clear challenges for the corridor; yet some saw opportunities for creating new open space and better streetscapes as part of new development
- **Transportation / Traffic / Transit:** The harsh pedestrian environments are partly conditioned by the vehicular bias of the corridor resulting from one-way pairs and the interchange with I-75/85 - many respondents felt that taming traffic was of paramount importance and a challenge. Similarly, some saw the good interstate access and MARTA coverage as definite advantages for the corridor.
- **The Homeless Issue:** The negative perceptions associated with the Peachtree-Pine and other social service facilities in the corridor, as well as the homeless encampments at Renaissance Park, are challenges identified by a significant number of people; a few also saw the problem as an opportunity, presumably because it forces attention and action.

At the conclusion of workshop 1, the results were summarized and presented to the Core Team for validation as well as posted on the Central Atlanta Progress website.

2.1.2 Public Workshop 2 – Charette Week

The second public workshop was held over the course of three days between September 16 and September 18, 2003 at AmericasMart (Building Three - the Apparel Mart). This 'Charette Week' was intended to provide the public with an opportunity for a focused, structured dialogue on key planning issues for the corridor including land use, circulation and urban design, followed by a team working session culminating in a third-day public presentation of the consensus plan. Both the initial session and the public recap were well-attended with over 100 persons at each.

Day one of the workshop opened with a welcome, introduction of the planning team and presentation of a short video orienting attendees to the existing conditions in the corridor and the strategic questions affecting the participatory exercises. The four-hour event was broken into four individual sessions – land use, circulation, open space and identity – each had a warm-up exercise involving choosing images that represented group consensus on the desired appearance of the elements under discussion in each session. There were a total of ten tables with ten to twelve participants at each, guided by two facilitators at each table.

Session one, land use, consisted of two interactive exercises in addition to the image selection. Over a large printed map of the study area boundaries each group was asked to color in the

What do you perceive to be the biggest challenge in the JSA-McGill Corridor?

Transportation, Traffic and Transit (16 Responses)

Many comments on vehicular and pedestrian conflicts, the impact of the interstate, the underutilization of MARTA

The Homeless Issue (16 Responses)

Comments ranged from the negative impression of the area compounded by the homeless, to aggressive behavior of panhandlers, to theft and drug use

Lack of Retail and Local Services (6 Responses)

Most responses focused on increasing the stock of retail, although some were specific about retail tailored to neighborhood residents

Public Improvements (6 Responses)

The big issue was overcoming the impact of the Downtown Connector at Peachtree Street

Lack of Pedestrian Activity / Walkability (5 Responses)

Some of the concerns over pedestrian activity were linked to the poor appearance of the area, noting that streetscapes are fragmented or disconnected

Perception Issues / General Blight (5 Responses)

This issue overlaps with others in that several causes mentioned as contributing to the corridor's derelict appearance are vacant lots, streets empty of pedestrians, and the presence of the homeless

Lack of Housing / Lack of Residents / Affordability (5 Responses)

Cost of living and housing affordability were mentioned as disincentives to prospective residents

Parking (3 Responses)

One response identified the challenge of overcoming too much parking, while the other two were unclear whether parking is an immediate or future problem

Destination / Theming (3 Responses)

Two individuals mentioned the idea of a welcome center, while one felt that the area should be marketed as a destination because of the several attractions

Design / Human Scale (2 Responses)

The scale of 'Big Projects' (Georgia Aquarium, World of Coca-Cola, Connector) was seen as an issue

Other (1 Response Each)

Incentives, difficulty of building consensus with property owners, relocating the Georgia Power substation

What is the greatest opportunity in the JSA-McGill Corridor?

Potential for Open Space Creation / Walkability (15 Responses)

Many comments on public space and the pedestrian environment; implicitly tied to the presence of vacant land and unimproved streets

Clean Slate for Development (12 Responses)

Clearly the area's greatest opportunity, considering the underlying assumptions of the interest in more open space; conversion of surface parking reduces development costs, avoids preservation / environmental conflicts

Potential for New Housing / More Residents (10 Responses)

Similar interpretation as open space / walkability advocacy - tied to stock of development opportunities

Good MARTA Coverage / Good Interstate Access (9 Responses)

Several responses about proximity to Civic Center station, also MARTA bus routing; good vehicular access also seen as a plus

Potential for New Retail / Services (6 Responses)

Similar interpretation as open space / walkability advocacy - tied to stock of development opportunities; also some indication of underserved / captive audience in existing residents

Location / Visibility / Urban Form (5 Responses)

Central location facilitates good connections to other areas, three universities; interstate visibility enhances development opportunities, image of Downtown; small blocks an asset to walkability

Existing Neighborhood Resources (3 Responses)

Vested, committed residents already living Downtown perceived as an asset

Prominence of the Homeless Issue (2 Responses)

Unsure of logic - assumed respondents felt that the magnitude of the homeless issue forces awareness and attention to solutions

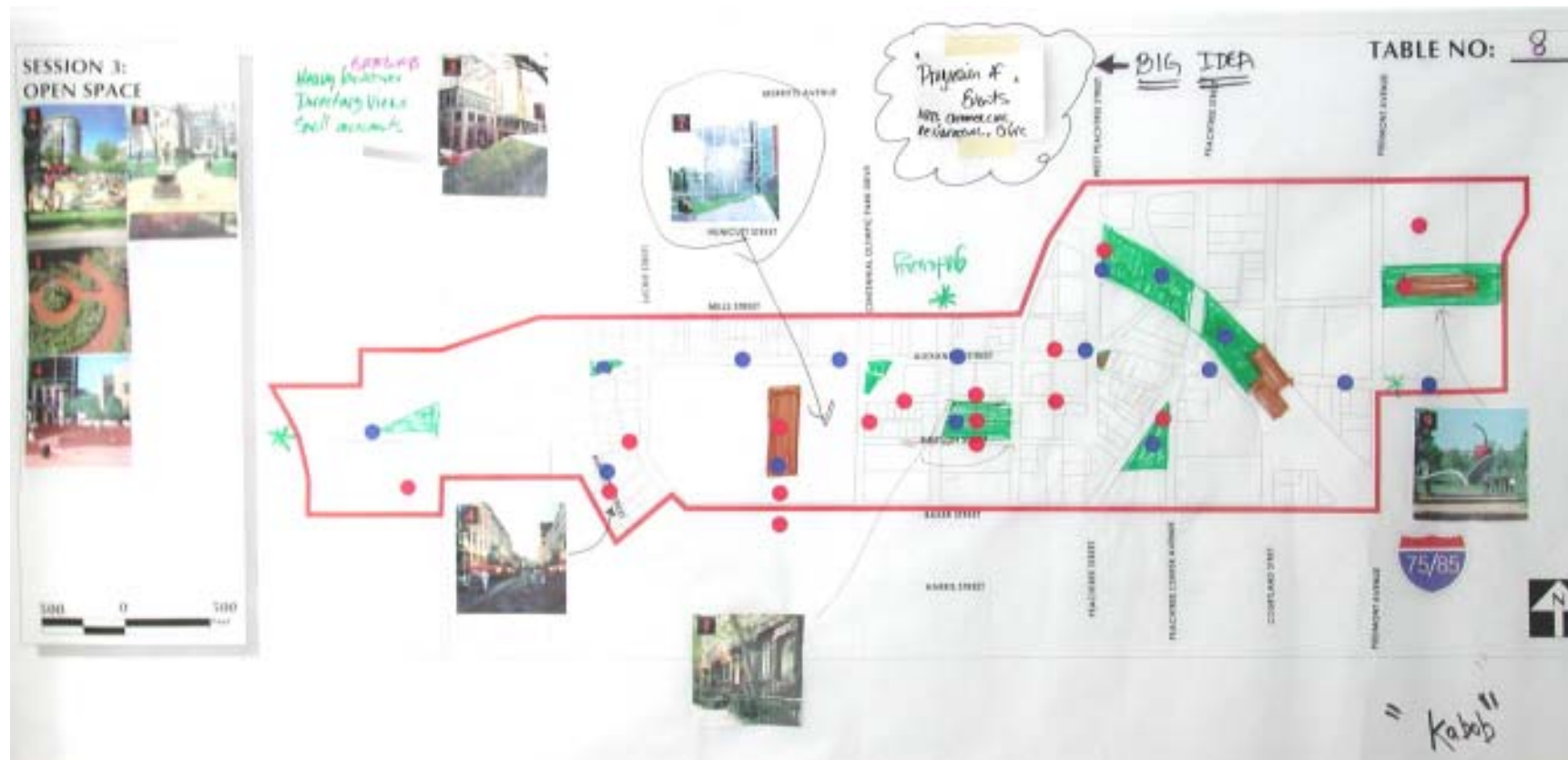
Welcome Center (2 Responses)

Unsure of intention - assumed reference to area as gateway to east and west sides

Other (1 Response Each)

Opportunity for innovative parking solutions; opportunity for historic preservation; opportunity for business start-ups; opportunity to merge business and civic interests; opportunity to provide additional entertainment venues; opportunity to increase property values; proximity to other successful areas an opportunity





Open Space



Land Use



desired future land use of all parcels subject to change. Seven land-use categories – low-density residential, high-density residential, residential mixed-use, commercial mixed-use, office, institutional, and open space – constituted the range of options available to each group. Once consensus was reached on future land use, groups were charged with prioritizing retail locations by sticking a prescribed amount of red adhesive-backed strips down on the colored future land use maps. Though no two tables were alike, several areas of consensus emerged among all ten:

- The Marietta Street corridor biased toward commercial mixed-use, with residential interspersed;
- Centennial Hill as both a residential and commercial mixed-use district;
- Increasing commercial uses toward West Peachtree Street in Centennial Hill;
- Simpson and JSA as the primary retail streets in Centennial Hill;
- The redevelopment of the Civic Center surface parking as either residential mixed-use or institutional, presumably a expansion of the Civic Center; and
- A major new open space bridging the interstate.

In addition, the following images were overwhelmingly popular among all groups as being appropriate representations of the character of development desired in the corridor:

Residential



Office



Retail



Session two, circulation, opened with five categories of images: boulevards, thoroughfares, avenues, neighborhood streets, and pedestrian streets or 'mews'. The idea was not only to get a sense of the street character people desire, but also to get the participants thinking about hierarchies of streets in environmental instead of vehicular terms. Part two of session two charged the groups with classifying each street in the study area as having either light, medium or heavy pedestrian use; heavy pedestrian streets were colored red, medium were colored

orange, and light were colored yellow. By having to consider both the ways streets currently serve pedestrians and how each might change in the future, the groups were forced to relate street design to the future land use choices they made in session one and consider key linkages.

The final exercise of session two asked each group to mark locations of on-street parking as dashed black lines on the base map overlay, and indicate where they would like to see structured parking facilities. The planning team hoped that by the process of layering character images, pedestrian volumes and parking over land use, a clear picture of each group's priorities for the study area circulation system might emerge; for example, intersections of heavy pedestrian streets might suggest locations for bus transit stops.

From all the groups' individual exercises in session two, these ideas represented areas of consensus:

- West Peachtree Street was identified as a heavy pedestrian street by all groups;
- JSA-McGill varied in pedestrian use, with Centennial Olympic Park Drive dividing a heavy eastern from a light western half;
- Streets such as Spring and Courtland currently carrying heavy traffic volumes remaining as such, with low pedestrian activity (with the exception of Piedmont); and
- On-street parking placed throughout Centennial Hill.

In addition, the following images showed some consensus about appropriate street character:

Boulevard



Thoroughfare



Avenue



Neighborhood Street



Session three, open space, tested feelings about the character of open space with images in five categories: parks, gardens, plazas, sidewalks and squares. Although open space was a category in the future land use exercise of session one, it was intended to allow groups the

flexibility to suggest large parks, typically the size of an entire city block. In the second exercise of session three, groups were asked to be more discriminating about open space by locating parks and plazas with cut-out pieces of green construction paper. Each group was also given a vellum circle that was sized to represent a quarter-mile radius at the scale of the land use base map, 1" to 50'. Groups were encouraged to provide open space amenities throughout the study area, but in no case more than a quarter-mile walk from each other.

Exercise three returned to the idea of pedestrian uses; groups were given sheets of red dots and asked to stick them on the base map to represent concentrations of pedestrians. There was no limitation on where the dots could be applied – groups could choose to animate their open spaces of exercise two, or reinforce particular portions of streets marked in session two. Once the groups had placed their red dots, they were given a limited amount of blue dots to represent pedestrian enhancements such as fountains, public art or outdoor dining. Groups again used the base map to show locations of enhancements by affixing the blue dots.

Areas of consensus on open space included the following:

- A new park flanking Peachtree Street, built over the interstate;
- A park at the intersection of the Spring Street connector and Centennial Olympic Park Drive;
- A park or plaza in the vicinity of JSA and Marietta Street;
- An expansion or enhancement of the Civic Center plaza; and
- Pedestrian concentration in Centennial Hill, especially at the intersections along Simpson.

These images showed the type of open space character the participants tended to agree on:

Gardens



Parks



Plazas



Squares



Session four, identity, opened with four categories of images: street edges, gateways, landmarks, and neighborhood character. Once all groups had chosen their images and applied them to their base maps, a key question was posed regarding whether the study area required a singular, homogeneous identity or whether it was a sequence of districts, each with its own distinct character. Participants were challenged to reflect on all the previous exercises before answering the question. Each group discussed this amongst themselves before writing the answer on their sheets; along with the decision of homogeneity or plurality groups were asked to write down some of the identity themes that might apply.

The final exercise in the workshop required each group to use wooden blocks to 'build out' the mass, height and density of the study area. Again, groups were asked to consider all they had done previously, and work over the land use base map to realize their plans in three dimensions. There were different results depending on group for this exercise, but some common ideas were strikingly apparent:

- JSA-McGill between Centennial Olympic Park and Peachtree was depicted as a very dense, urban street – almost like an urban 'canyon';
- A notion of 'gateways' to Centennial Hill and Downtown visible from the interstate;
- Low- to medium-density buildings along Marietta;
- Medium-density (eight- to ten-story) buildings in the center of Centennial Hill; and
- High-density towers framing the park over the interstate

Groups chose the following images to represent their ideas of identity for the study area:

Street Edge



Gateway



Landmark



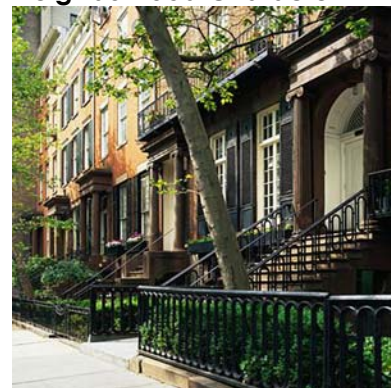
Landmark



Neighborhood Character



Neighborhood Character



While no two tables were completely alike, there were many similarities both in large-scale strategies (mixing land uses) and specific improvement projects (the interstate park). After reviewing all the group 'collages' against each other, the planning team set out to refine the visions into a draft concept plan. As the team worked within the parameters of actual block dimensions and street alignments, these design themes materialized to order the plan:

- **Centennial Hill as an Urban Village:** The combination of mixed-use medium-density buildings at the core of Centennial Hill with the focus on Simpson Street as a significant pedestrian destination led to the idea of Centennial Hill as a unique district or an 'urban village'. Simpson becomes the main neighborhood street of Centennial Hill, with shops and restaurants clustered around its intersections with Spring Street, Williams Street and West Peachtree Street. The notion of Simpson as a kind of 'restaurant row' serving not only the neighborhood but visitors to the Aquarium and the World of Coca-Cola is reinforced by its location at the midpoint of two MARTA stations, and park space anchoring each end. The team chose to recommend expanding the Children's Museum in the second phase of Museum Tower, supporting the critical mass of destinations at Simpson's western end.
- **A succession of open spaces along JSA:** The reconstruction of JSA in line with the completion of the Georgia Aquarium will transform what is now a derelict right-of-way into a major urban avenue. Visibility, access, market preference and projects on the verge of implementation will almost certainly guarantee that the portion crossing Centennial Hill will be the equivalent of what Park Avenue is to the Upper East Side. Every group saw the potential in JSA, and its connective ability between unique districts. To capitalize on this quality, the team used central points in each district to create parks and plazas that define the character of the street. Each park or plaza also acts as a gathering place for its neighborhood.
- **A reinforcement of the Civic Center MARTA station:** All groups recognized the underutilization of the Civic Center MARTA station and placed an emphasis on improving connections and encouraging development to optimize the station's potential. The design team responded by giving high-priority status to both West Peachtree Street streetscape improvements and physical linkages to the open space bridging the interstate and Peachtree Street. As a long-term possibility, the interstate cap might extend to and incorporate the MARTA station; the cost of this extension could be offset somewhat by private development of interstate air-rights.
- **Revitalization of the Civic Center and surrounding property:** The possibility of redeveloping the surface parking lot at the rear of the Civic Center has been around for many years. The slow pace of development in the area south of North Avenue ('SoNo') coupled with the unintended externalities from the social service centers has stalled serious redevelopment efforts; the effects have spilled over to the public spaces around the Civic Center so that what was once an open forecourt is now fenced and gated. Built during the era of monumental civic complexes, the Civic Center and plaza was inspired by the magnetism of Lincoln Center in New York. The design team recognized that rebuilding the plaza was a key step in moving the Civic Center closer to its redevelopment future.
- **Preservation of the small-scale context of Marietta Street:** Marietta is one of three historic railroad corridors leading into Downtown, and has over the years acquired a stock of small-scale former light industrial and warehouse buildings. Keeping some of this fabric intact is important to understanding the growth of the city as well as making it desirable

for the urban loft residential market. The design strategy for Marietta involves preservation and infill, as well as creation of a centralized open space.

- **Orienting future land use almost exclusively toward mixed-use:** The planning work associated with the updating of the SPI-1 zoning district opened discussions on the appropriateness and benefits of mixing uses on single development parcels. The JSA Charette Week validated the public interest in diversifying development away from single-use projects. Development opportunities in the JSA concept plan lean heavily toward mixed-use to bring goods and services into residential neighborhoods and equalize the jobs-housing balance.

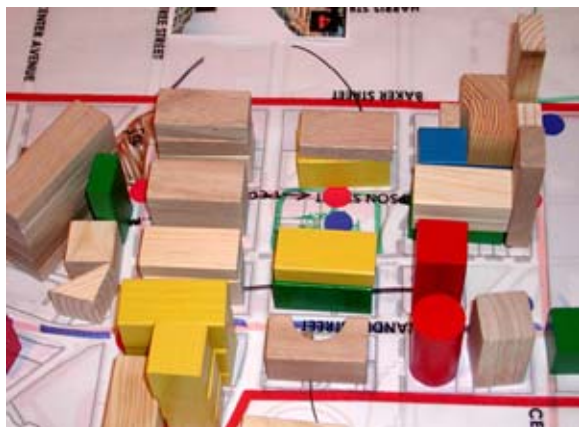
These ideas formed the basis for assembling the draft framework and illustrative plans, and translated into five vision statements:

- **A place of arrival...** Downtown gateways
- **A place to live...** Centennial Hill Urban Village
- **A place to relax...** a new park over the Interstate
- **A place to walk...** Marietta, McGill, Simpson, West Peachtree
- **A place to eat and shop...** Simpson, Luckie, Marietta and Alexander

As the details of the plans were discussed and refined, several specific transportation, public space and development projects emerged; these projects are discussed further in Section 2.2

The final event of Charette Week was the presentation of the workshop results and draft plans on the evening of Thursday, September 18 (see Appendix A for the hard-copy version of the presentation). About one hundred persons attended, roughly half of whom participated in the previous workshop. Questions from the audience were addressed, and as a parting exercise each attendee was given several \$5 million-dollar bills to prioritize by 'paying for' their preferred projects that had been identified as possible corridor investments. The projects in order of participants' responses include:

1. Simpson Street Improvement - 46 votes
2. Gateways into Downtown - 41 votes
3. Park Bridging Interstate - 31 votes
4. Interstate Ramp Improvements - 27 votes
5. Park at Marietta Street and Alexander Street - 20 votes
6. Municipal Parking Structures - 16 votes
7. Baker Street Streetscape – 14 votes
8. GWCC Phase V – Entry Park - 12 votes
9. Civic Center Plaza – 3 votes
10. Piedmont Avenue Streetscape Improvement - 3 votes
11. Baker Street-Harris Street Two Way – 2 votes



2.1.3 Public Workshop 3

The third and final public workshop was held on the evening of Tuesday, November 18 at the Atlanta Civic Center. The workshop was structured as an open house, where all of the graphic products generated during the planning process were on display. A self-cycling PowerPoint presentation featured each project identified during Charette Week, with photographs of the existing context fading into illustrations of the future development. Members of the planning and project management teams were on hand to explain the plan and the choices made, as well as answer any questions that might arise.

Approximately sixty persons attended the workshop over the course of two hours. Feedback was positive, as many of the attendees were participants in Charette Week and complimentary of that process. As a final exercise, note cards were distributed to those who wanted to comment in writing on the plans. A few cards were collected at the conclusion of the evening, with these points noted:

- The block bounded by West Peachtree, Baker, Spring and Simpson should be identified as mixed-use residential
- Development at the intersection of Centennial Olympic Park Drive and Alexander Street should feature ground-level storefront treatment with active uses to animate the pedestrian space
- All parking structures, including municipal parking, should have street-level and street-fronting active uses
- Parking should be located underground wherever possible, for example under new public open spaces
- On-street parking should be maximized on all streets on Centennial Hill
- On-street, off-peak parking should be considered for thoroughfares like Piedmont Avenue and Courtland Street.

2.2 LCI Study Area Concept Plan

The JSA-McGill LCI Concept Plan is a direct outgrowth of the 'Charette Week' workshop process, and of the parameters defined by both extensive field analysis of existing conditions and the exhaustive series of stakeholder interviews underlying the Issues Matrix. In addition, the Concept Plan is supported by both transportation and market studies that, while specifically and carefully considering the needs of the corridor, also benefit from parallel work on the broader Downtown Atlanta context. The utility of an expanded context – in this case, the import of the Central Area Transportation Study (CATS) into the Jones-Simpson-Alexander transportation concept plan, and the market 'benchmarking' as part of Imagine Downtown – is registered in projects that are realistic in their assumptions and part of a web of improvements working together to benefit the entire extent of Downtown.

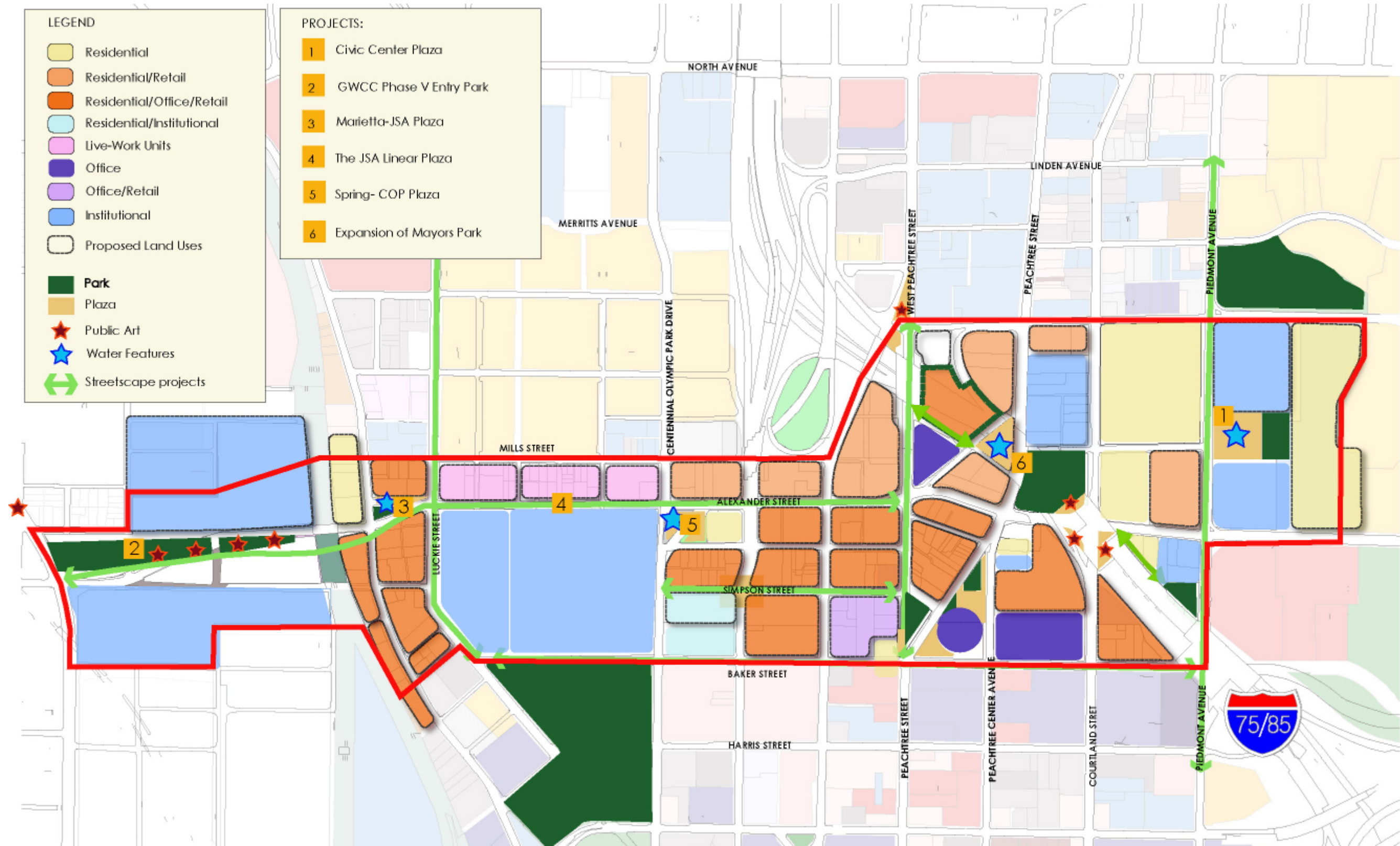
The Concept Plan is composed of two layers – a land use framework plan and a transportation framework plan. The land use framework plan deals specifically with the nature of future development and public spaces, while the transportation framework plan deals with improvements to mobility and connectivity.

2.2.1 The Land Use Framework Plan

The land use framework plan (Figure 2.4) is essentially two different but interwoven elements – a future land use plan that prescribes the desired development on private land, and an open space plan that identifies new plazas, parks and connecting streetscapes which order future development. Section 1.0 categorized the corridor as bracketed by major institutional uses – the Georgia World Congress Center and the Atlanta Civic Center – with a scattering of high-density commercial and medium-density residential. With twenty acres of vacant land being utilized for two additional institutional 'destinations', the balance of developable land aggregates into five distinct districts: the Marietta Street corridor; the JSA / Centennial Place spine; the area known as Centennial Hill; the district around the Peachtree / McGill / I-75/85 intersection; and the Civic Center surroundings.

Each district's future land use and development strategy is reflective of themes either present in existing development or resulting from public consensus during Charette Week. Marietta Street, a historic railroad and industrial corridor with existing buildings redeveloping as mixed-use lofts, preserves its orientation with an even coverage of residential, office and retail mixed-use. The exception to this pattern is the northward expansion of the Hastings Seed and Giant lofts, identified as single-use residential. New developments are envisioned to maintain the spirit of the industrial vernacular. On the other side of the Georgia Aquarium and World of Coca-Cola complex, Centennial Hill reflects the mixed-use diversity of Marietta Street, but in a different development package. While on Marietta the loft typology allows for commercial, residential or retail in undifferentiated space, in Centennial Hill the mixture of uses are accommodated in 'zoned' buildings; that is, certain areas – such as office - with independent circulation and mechanical systems are functionally separated from residential areas. Retail typically occupies strategic locations like corners on the ground floor. This pattern shifts north of JSA-McGill where higher visibility encourages higher concentrations of retail, this time in high-density residential projects (including towers marking the northern entry to Downtown) with continuous and significant ground level retail.

The blocks north of JSA between Marietta Street and Centennial Hill are unusually shallow and underutilized. Across Mills Street, Centennial Place mixes townhouses and apartments in a very placid residential setting, while the south frontage of JSA will likely contain most if not all of the loading and service entrances to the Aquarium and World of Coca-Cola. These 'transitional'



blocks require uses that adapt to the physical and contextual constraints of the site. A 'live-work' future land use classification is proposed in buildings that are double-fronted, with ground-floor commercial uses exposed to JSA and residential entries and garages along Mills Street; upper floors would be reserved for residential uses. Along with this specific development type a widened streetscape or 'linear plaza' on the north side of JSA provides a workable foreground to the commercial space.

At the eastern extreme of the corridor, developable parcels around the Civic Center and along Peachtree Street are targeted for residential and retail mixed-use of the kind proposed for the north end of Centennial Hill. Finally, the blocks straddling Courtland Street adjacent to the SunTrust offices are envisioned as a residential, office and retail mix, with high-density office on the Peachtree Center Avenue and Baker Street; high-density residential along McGill; and storefront retail at all street frontages.

Each future land use and development 'district' has an associated public space or open space improvement that serves to give the area an urban design focus and reassure private sector developers that there is a significant public commitment to create a world-class urban neighborhood. The proposed new public spaces are, from west to east:

- **Marietta – JSA Plaza** – a landscaped and hardscaped plaza created from the combination of a short redundant extension of Alexander Street to Marietta and the adjacent vacant triangular-shaped parcel; serves as a focus for the Marietta Street neighborhood and the Georgia Aquarium district
- **The JSA Linear Plaza** – the widening and enhancement of the north side of JSA between Centennial Olympic Park Drive and Luckie Street; serves to counteract the predominately service elevations of the Georgia Aquarium and World Of Coca-Cola, and incite development on difficult blocks
- **Spring – COP Plaza** – the regularization and improvement of the Georgia Department of Transportation (GDOT) parcels at the termination of the Spring Street tunnel and the intersection of JSA and Centennial Olympic Park Drive; serves as the transition between Centennial Place and Centennial Hill as well as a gateway to Downtown
- **Expanded Mayor's Park** – new open space 'cap' over I-75/85 at Peachtree Street flanking both sides of street and extending to the McGill – Courtland intersection; serves to mitigate the impact of the interstate and reconnect the 'SoNo' (South of North) portion of Downtown with Centennial Hill and the Aquarium area

In addition, two public space projects on either end of the corridor respond to future institutional development which, collectively with existing components, are large enough to be considered urban 'districts' in their own right:

- **Georgia World Congress Center Phase V Mall** – new landscaped promenade on northern flank of JSA from Northside Drive to the railroad viaduct, with widened median and tower elements similar to those present in International Plaza; serves as a western gateway to the JSA corridor and as a ceremonial space for the future Phase V expansion of the Georgia World Congress Center
- **Civic Center Plaza** – an expanded and improved entry court to the Civic Center complex and adjoining development; serves to terminate the principal pedestrian approach down Currier Street, provides an exterior complement to lobby space similar to Lincoln Center in New York City, and acts as a transition to future development on the Civic Center parking lot.

Additional descriptions of development character and public space components are included in section 2.2.3

2.2.2 The Transportation Framework Plan

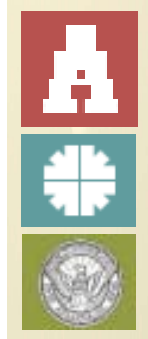
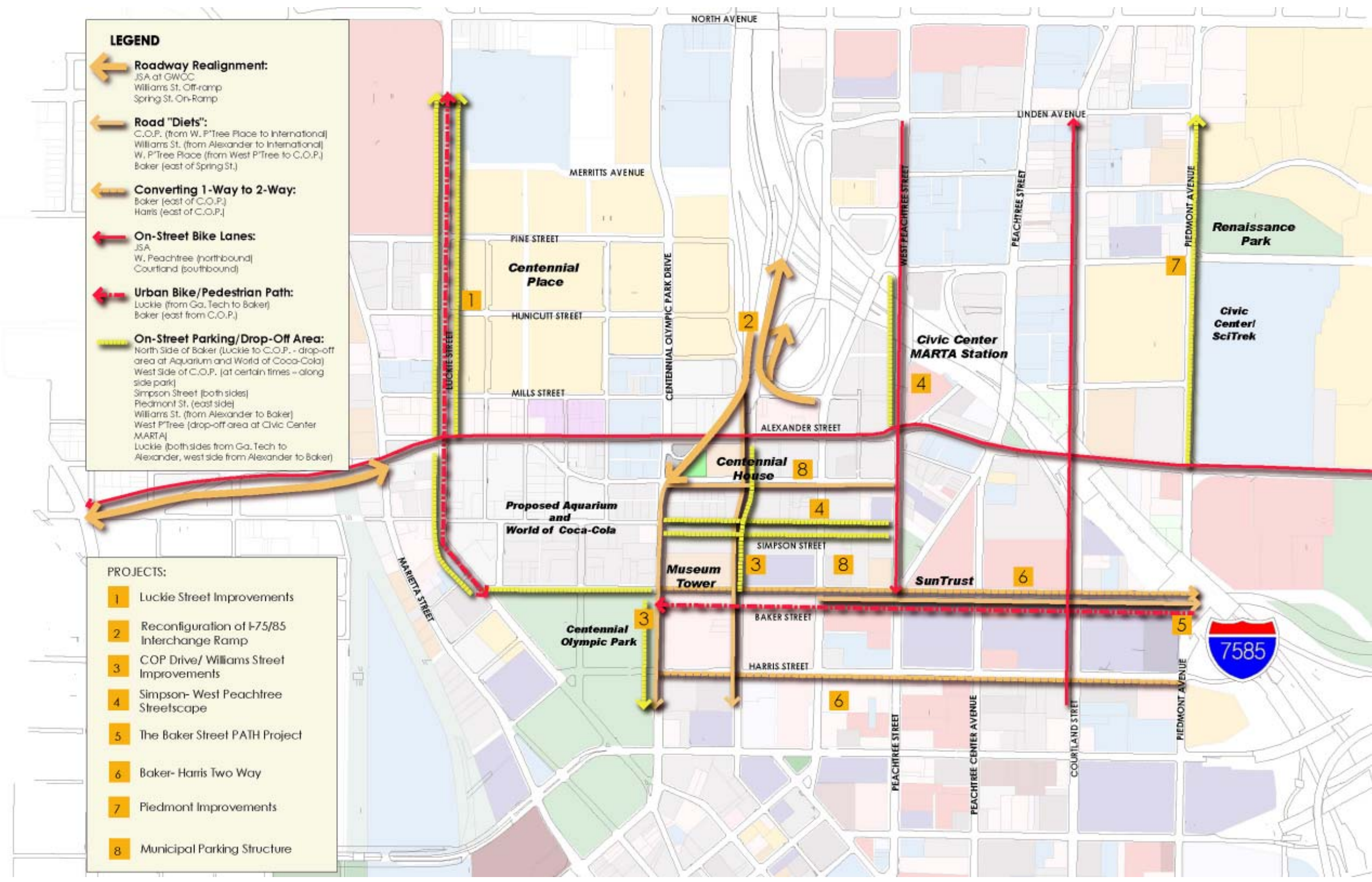
The most extensive transportation improvement in the corridor is the one that spurred the LCI project from the start – the new JSA-McGill. First proposed in 1999, the project has completed the conceptual design phase and been approved by the GDOT. The project will be constructed in phases to provide critical transportation improvements prior to the opening of the Georgia Aquarium in 2005. Construction of the segment between Luckie Street and West Peachtree Street is scheduled in 2004.

The need for the project arises from several issues in the area including the ongoing development activity, the lack of sufficient connections across the railroad between the neighborhoods to the east and west sides of Downtown, and the importance of providing a direct route between the Georgia World Congress Center and the hotel district that is designed to accommodate bus and pedestrian traffic. The basic design (see appendix for alignment illustrations) features four 11' travel lanes, two in either direction, with a variable width median and single turn lanes at key intersections and includes bike lanes, planting strips and new sidewalks. While generally following the path of Alexander Street, the design breaks from the existing street grid west of Marietta Street to gently sweep southward to the Simpson Street – Northside Drive intersection. As part of the improvement the one-way sections of JSA and West Peachtree Place would be converted to two-way operation.

Validating the concept design was an early priority in the LCI process given the schedules of the Georgia Aquarium and World of Coca-Cola projects. The concept plan was first tested for applicability and vehicle capacity based on the development programs and available site plans of the projects. With some minor changes, the concept plan was then presented as a given future condition for Charette Week.

The lively dialogue and exercises in Charette Week resulted in several additional transportation-related projects that enhance the JSA concept, improve corridor access for alternate modes, and adjust some streets for broader roles as urban spaces:

- **Luckie Street Improvements** – a multi-use path (an ongoing project of the PATH Foundation); provides a dedicated pedestrian and bicycle right-of-way from Atlantic Station and Georgia Tech to Centennial Olympic Park as well as parking and traffic calming for the Marietta / Centennial Place neighborhoods
- **Reconfiguration of the I-75/85 Interchange Ramps** – exit ramp realignment to penetrate the Spring Street 'tunnel' feeding to Centennial Olympic Park (COP) Drive, and entry ramp relocation to Spring Street north of JSA for single-occupancy vehicles; serves to reduce traffic volume and speed on Williams Street, reduce intersection congestion at Williams and JSA, and direct vehicles more efficiently to the Baker Street entrance / drop-off of the Aquarium
- **COP Drive / Williams Street Improvements** – 'road diets' (narrowing road width to become leaner, safer and more efficient) for COP Drive and Williams Street by the introduction of on-street parking; serves to reduce traffic speeds, provide visible parking to incite retail uses, provide better pedestrian environments, and offer a potential staging area (on COP Drive) for visitor buses feeding the Aquarium



- **Simpson – West Peachtree Streetscapes** – new streetscapes extending from the Civic Center MARTA station to the World Of Coca-Cola site along West Peachtree and Simpson Streets; serves to encourage transit ridership by connecting MARTA with the attractions of the Aquarium and World Of Coca-Cola, also to encourage mixed-use, pedestrian-oriented development along Simpson Street as the center of Centennial Hill
- **The Baker Street PATH Project** – streetscape and sidewalk improvements to Baker featuring a dedicated, traffic-separated bicycle and pedestrian path along the south side from Jackson Street to Centennial Olympic Park; provides missing connection between Freedom Parkway trail to Centennial Olympic Park and serves to calm traffic speeds on Baker as well as improve the pedestrian environment
- **Baker – Harris Two-Way** – conversion of one-way pairs to two-way movement by restriping; provides additional route flexibility between the Aquarium and World of Coca-Cola and I-75/85 as well as additional routes for local traffic
- **Piedmont Improvements** – streetscaping and on-street parking provision for Piedmont Avenue between Harris Street and North Avenue; exchanges excess vehicular capacity for better pedestrian environments and visible parking to assist fledgling businesses, while reducing notably high traffic speeds overall

One final project is tied to both land use and traffic but a distinct enough to be its own category:

- **Municipal Parking Structures**– parking decks built as stand-alone or part of larger projects, either as publicly funded or under a public-private partnership; serves to rationalize parking strategies and wayfinding throughout the corridor, and provides an incentive for redevelopment of surface parking lots through both reducing development hard costs for the private sector and introducing increased parking competition to reduce rates for better land utilization

2.2.3 The JSA- McGill Illustrative Plan

The JSA-McGill Illustrative Plan builds a vision of the future that is based upon input from many sources, both inside and outside the community (Figure 2.6). The Plan carries the hopes and dreams communicated through words and drawings at the public workshop, and physically translates them into a vision plan. This vision is then checked against economic reality from the independent market analyses performed by the consultant team. The three overriding goals and objectives throughout this process that are reflected in the plan include:

1. Create an Identity:

The JSA-McGill corridor forms one of the prominent entry points into Downtown and currently has no gateways or landmarks celebrating this entry. The plan proposes landscape improvements at I-75/85 to establish an identifiable place of arrival along with building portals forming a physical and symbolic threshold that mark the entry point to the JSA-McGill corridor. This portal would be supported by a plaza with a fountain or public art.

2. Create New Neighborhoods and Strengthen Connections:

New residential development within the corridor will create the 24-hour environment envisioned for the area. The plan proposes the redevelopment of land currently vacant or underutilized to

create these residential communities in the JSA-McGill Corridor. Prominent examples of such residential districts are described below:

The Village at Simpson Street

A new mixed-use urban neighborhood at Alexander Street and West Peachtree Street will redevelop existing surface parking lots. New residential, cultural, office and retail uses will build a 24-hour pedestrian oriented environment. Simpson Street forms the heart of the retail pedestrian core, and creates an inviting path from the Peachtree corridor to Centennial Olympic Park, the new World of Coca-Cola, and the Georgia Aquarium. A municipal parking deck is proposed to financially support new residential and neighborhood retail development in this area. SciTrek is relocated from its current location beside the Civic Center, to a new location adjacent to the Children's Museum. This creates a synergistic cluster of family oriented cultural venues that work with the Georgia Aquarium and World of Coca-Cola.

SoNo

The area south of North Avenue, commonly known as 'SoNo' (or South of North) is poised for new urban residential, retail, and office development. New development will support ridership for the underutilized Civic Center MARTA station. The development will also begin to strengthen and reknit the connections between Midtown and Downtown Atlanta.

Civic Center

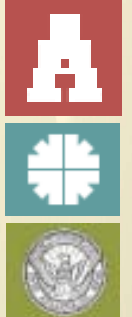
Underutilized surface parking lots that surround the Civic Center will be developed to build a new residential core on the east side of the JSA-McGill corridor. The existing SciTrek buildings transform into a new neighborhood school. The neighborhood school helps to attract new residents with families.

3. Restore and Improve the Public Realm

Along with new mixed-use developments and transportation linkages, an improved pedestrian environment is essential for attracting people to this area. Streetscape improvements, including wider sidewalks, street trees, and on-street parallel parking, to support and encourage pedestrian activity are planned along a majority of streets in the study area, described in detail in Section 2.3, 2.4 and 2.5. Focus will be on enhancing critical pedestrian paths to and from activity centers that support new land uses, such as retail and cultural venues. The pedestrian path from the Civic Center and Peachtree Center MARTA stations to Centennial Olympic Park should concentrate improvements on Simpson Street as a major pedestrian amenity street.

Parks form an integral part of the plan. Mayor's Park, located adjacent to the Interstate will be extended to bridge the Interstate and will reconnect the east and west sides of the JSA-McGill corridor, adding value by providing a new major public park amenity. A new linear park at JSA-McGill and Northside Drive will forge a new connection to the neighborhoods on the west side, and frame a gateway to the GWCC convention district. The linear park will extend east along the JSA-McGill right-of-way as development occurs over time. Smaller pocket parks, like a pocket plaza at Marietta Street will provide for the additional recreation needs of the residents in this area.

Hence the JSA-McGill Plan will successfully integrate existing and proposed development with open space improvements and transportation linkages, creating a pedestrian-friendly mixed use environment.



2.3 Short-Term Priorities (within 3 Years)

Open Space and Parks

A. Marietta – JSA Plaza

The Marietta Street artery has received new impetus to its development with the ongoing construction of the Aquarium and proposal for World of Coca-Cola. Already seen as an intown loft district, recent loft conversion projects like Giant Lofts and the Hastings Seed Lofts have contributed towards enhancing the railroad character prevalent in this district. In addition, some new developments like Uptown Lofts have been well received as infill projects. Though the historic nature of the buildings defines Marietta Street's character, the public environment does not contribute towards unifying the district.

The proposed plaza would also serve as a public gathering space for the new residents moving into this area. Centennial Olympic Park, located at a short distance from the Marietta Street, currently provides the necessary active recreation space. Hence a moderately sized plaza with features such as benches and public art would be adequate in providing for the passive recreation needs of these residents. This new pocket plaza located on Marietta would enhance the visual character of the area and create an entry gateway into the district. In addition to seating, this plaza would include some type of public art like a water fountain or sculpture.



Figure 2.7: Marietta – JSA Plaza looking west

Located at the junction of Marietta Street and Alexander Street, the plaza would be created on the 0.17 acre wedge-shaped property, currently used as surface parking. The traffic on Alexander Streets is diverted on to Jones Avenue before it dead-ends into Marietta Street. This short redundant length of Alexander Street would be included into the plaza or converted into a pedestrian walkway. Though presently a high-speed vehicular street, on-going plans for JSA corridor improvements include making the street a continuous two-way vehicular connection along with wider sidewalks, improved pedestrian access, enhanced transit mobility and bike lanes. The new plaza along with the streetscape improvements would increase pedestrian activity and help support the retail surrounding this area.

Recommendations:

- Provide a new plaza on the property at the intersection of Marietta Street and Alexander Street
- Reconfigure the western part of Alexander Street (where it intersects Marietta Street) to be pedestrian only and divert the traffic along Jones Avenue.
- Provide passive recreation facilities like seating along with public art and water features.

B. Spring – COP Plaza

Spring Street, as it proceeds southbound from Midtown, swings west to dip below Williams and Alexander Streets and merges into Centennial Olympic Park (COP) Drive at the point where COP Drive changes from two-way to one-way traffic. This arrangement, though efficient in moving vehicles, has resulted in major problems for the urban environment. Five traffic lanes are rarely filled beyond two cars deep, and crossing them is a dangerous proposition for pedestrians. The abrupt transition from two-way to one-way traffic is confounding to first-time visitors; and in concert with the one-way bias of West Peachtree Place frustrating for residents of Centennial House. The tunnel / bridge structure and the GDOT right-of-way on either side is an extension of the vernacular of the interstate, and not reflective of the urban space it should be. The tunnel often floods; and there is no indication once through that one has arrived in Downtown.

Some of these issues can be addressed by two moves: taking better advantage of the tunnel width and direct connection to COP by allowing some southbound exiting interstate traffic to drop down into the tunnel (see Project 4 below); and redesigning the intersection and bridge area to be an urban plaza and a gateway to Downtown. Currently, Spring Street Connector traffic looking to travel northbound on COP Drive can use a dedicated right-turn lane to arrive at the JSA / COP intersection. While this option is still necessary, especially with the realignment of the interstate exit ramping, the lane can be reconfigured to avoid bisecting the GDOT landscaped embankment. A more conventional 'T' intersection with a hard-right turning movement on to a single northbound lane would free up land area for plaza improvements. Likewise, the southbound merge onto COP would also require additional study to calm traffic and provide a better pedestrian crossing environment at West Peachtree Place.

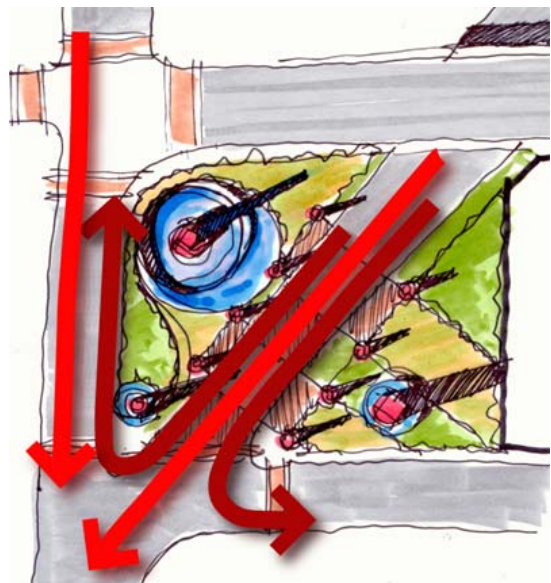


Figure 2.8: Spring – COP Plaza showing conceptual traffic movements

The Spring Street – COP Plaza is particularly important given the development that will occur on the World of Coca-Cola site, and for two additional reasons. First, pedestrian movement from the Civic Center MARTA station along JSA heading for the Aquarium and the World of Coca-Cola will be forced to navigate this intersection. The plaza will mark the point where pedestrians either turn north for the Centennial Place neighborhood and Georgia Tech, south for Baker and the Aquarium, or continue west for the historic Marietta district. As a point of reference for wayfinding and as a visible symbol of the surrounding neighborhood, the Spring Street – COP Plaza is second only to the extension of Mayor’s Park over the interstate. The plaza also serves

the important function of anchoring the eastern end of the proposed JSA linear plaza (see Item C below), which attempts to mitigate the presence of the Georgia Power substation and the service entries of the Aquarium and World of Coca-Cola. Second, the plaza will be the first point of contact with Downtown for vehicles destined for the attractions around Centennial Olympic Park or the Georgia World Congress Center. Just as signature development is critical for sites on the north side of JSA as markers for Downtown, so is the Spring – COP Plaza and its surrounding development key to signaling arrival and establishing an identity for COP and the emerging museum district.

The plaza is envisioned as a formally landscaped space centering on a water feature that links it to other fountains in the JSA open space sequence. Portions of the JSA bridge would be reconstructed to eliminate unusable space, extend and widen the JSA sidewalk to link to West Peachtree Place, and give Centennial House a fourth frontage and an incentive for storefront retail to wrap the southwest corner of the building.

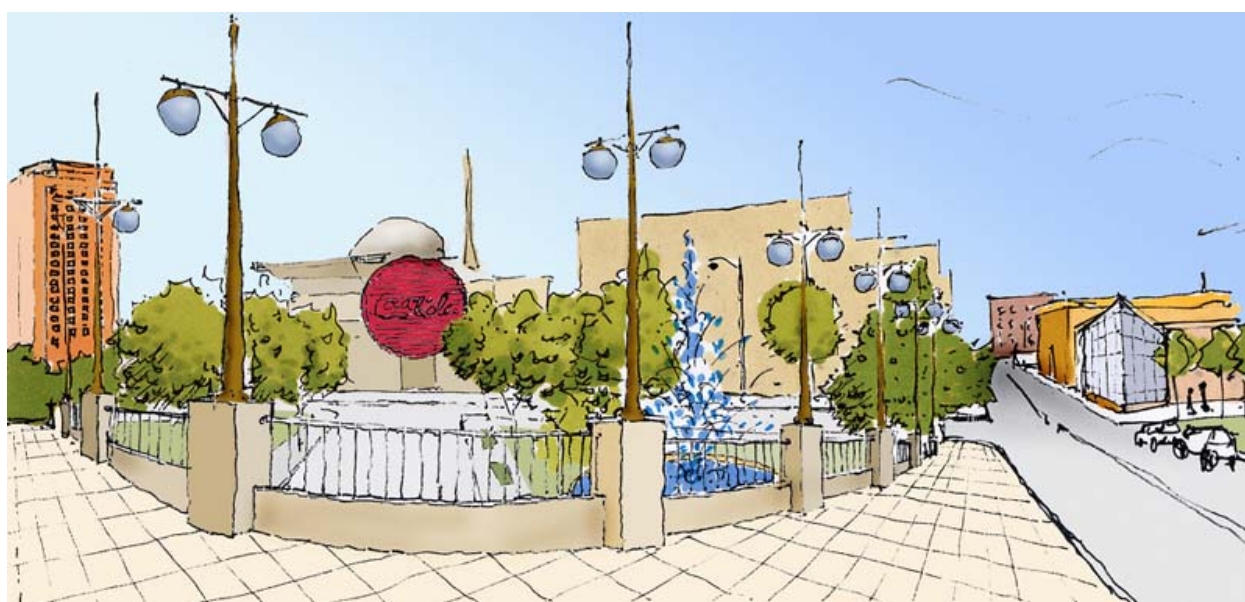


Figure 2.9: Spring – COP Plaza looking southwest from the JSA bridge

Recommendations:

- Study the potential traffic impacts of reworking the Spring Street Connector – COP intersection and the dedicated northbound deceleration lane
- Redesign the JSA bridge to eliminate unused spaces and provide a pedestrian connection to West Peachtree Place
- Acquire right-of-way from GDOT or arrange a lease agreement to construct a water feature and paving in the section of embankment between the Spring Street Connector and COP Drive
- Investigate the possibility of design regulations for new development around the plaza to ensure active pedestrian uses and architectural compatibility

Transportation/Circulation Improvements

1. Luckie Street Improvements

The City of Atlanta completed The Atlanta Commuter On-Street Bike Plan in 1995, with recommendations for on-street and off-street bikeway connections throughout the City. Luckie Street was identified as a part of this plan for the Downtown Loop project which would create a multi-use bicycle-pedestrian path connecting Georgia Tech, Midtown, Downtown, the Freedom Trail and the Westside Trail. Central Atlanta Progress conducted a supplementary study, 'The Central Atlanta Bicycle Facility Transportation Study' to identify priority transportation projects in 2000. This study also identified Luckie Street for a Multi-use Urban Bike-Pedestrian Path.

Along with being an important north-south street, Luckie Street is also one the shortest routes connecting Georgia Tech with Centennial Olympic Park and Downtown. In addition to the Coca-Cola Complex, recent developments like Centennial Place apartments, Centennial Place Elementary School, the YMCA and the Aquarium have increased pedestrian activity in the area, requiring better facilities. Currently a four-lane street (with one additional on-street parking lane), Luckie Street is underutilized except during peak office hours, when vehicular traffic entering the Coca-Cola Complex creates some congestion at the intersection of Pine Street and Luckie Street.

The streetscape improvements suggested for Luckie Street are focused on an urban multi-use bike-pedestrian path running through the center of the street. This 'Coca-Cola Parkway' concept considers two options for the location of this multi-use path. The first option incorporates a central bikeway with landscaped buffers on both sides while the second option recommends widening existing sidewalks into urban trails with enhancements such as landscape and way-finding signage. Both options have their advantages – Luckie Street is currently under consideration for a transit connection between northwest Atlanta and Downtown. A dedicated lane for an urban-trail could be converted into a transit lane. However this would require removing the on-street parking lane or reducing one vehicular lane going north. The second option may be more financially feasible as it requires using existing sidewalks. In addition, the on-street parking lane could be preserved and continued up to the new Aquarium to support new retail that is proposed at the Alexander – Luckie node. Additional pedestrian intersection improvements are recommended at the corner of Alexander and Luckie Streets and at the corner of Mills and Luckie Streets.



Figure 2.10: Luckie Street looking north



Figure 2.11: Luckie Street looking north

The PATH foundation, a non-profit organization dedicated to developing a metrowide trail system for Atlanta, has shown keen interest in providing funds for the multi-use trail on Luckie Street. Additional support from the City and other governmental organization can expedite the process of creating this important link into Downtown.

Recommendations:

- Create an urban bike-pedestrian trail along Luckie Street.
- Providing streetscape improvements along Luckie Street
- Pedestrian Intersection improvements at the corner of Alexander and Luckie and at the corner of Mills and Luckie
- Studying the option for creating an additional parking lane on Luckie Street

2. Simpson – West Peachtree Streetscapes

Since the Olympic Games and the construction of Centennial Olympic Park in 1995, the area bounded by Alexander Street, West Peachtree Street, Baker Street and Centennial Olympic Park Drive has been discussed and positioned as a medium- to high-density residential neighborhood called Centennial Hill, its primary champion being COPA (Centennial Olympic Park Area – an affiliate of Central Atlanta Progress). Its abundance of vacant land make it a prime development target; but the expensive land and development costs for residential uses in Downtown and the stagnation of activity on the Aquarium and World of Coca-Cola property dampened plans for new residential projects. Only two mixed-use developments – Museum Tower and Centennial House, both built by public-private partnerships – moved forward to give the area its first stock of major new housing since the construction of Peachtree Towers in 1962.

COPA has been retired, but the development interest still exists. With both the construction of the Aquarium and the improvements to JSA, developers are taking new notice of Centennial Hill; one mixed-use project is in design scheduled for a 2004 groundbreaking at this writing. Indeed, Centennial Hill and the Aquarium and World of Coca-Cola complex are dependent on each other – Centennial Hill for the visitors the attractions will bring to new retail, and the Aquarium and World of Coca-Cola for a renewed and dynamic neighbor that can offer added value and entertainment for patrons.

As demonstrated in other places in Atlanta, investing in public improvements is one way to jump-start development by giving the private sector confidence in the city's commitment to the area. Public improvements – if sensitively located and carefully designed – can also give an area an urban focus and an identity. As it became apparent that pedestrian traffic from MARTA to the Aquarium would most likely pass through Centennial Hill, Simpson Street began to emerge as the target corridor for urgently-needed pedestrian improvements. Not only is Simpson at the mid-point of the distance between the Civic Center and Peachtree

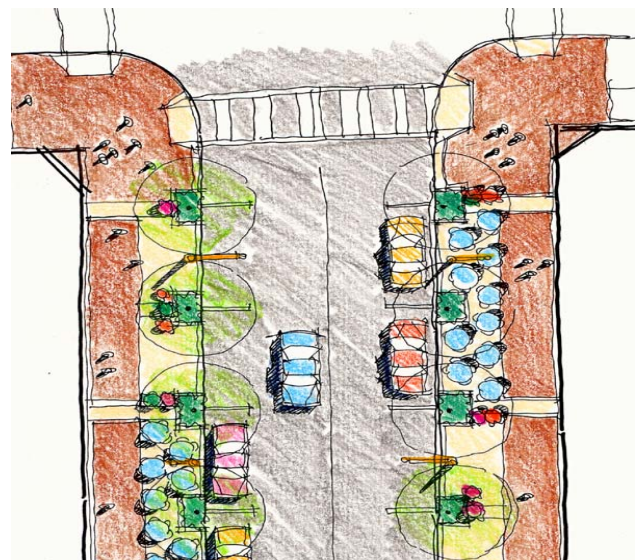


Figure 2.12: Plan of proposed Simpson Street improvements showing possible pavement treatment and dining areas

Center MARTA stations, it is the approximate north-south center of Centennial Hill.

The improvements suggested for Simpson Street include on-street parking (9' each side) with two 11' lanes of traffic, one in either direction. A minimum 30' wide sidewalk is recommended, with 5' street furniture, 15' clear zone and 10' supplemental zone. Street trees should be consistently spaced at 30' on center to form an even canopy for outdoor dining, which could take place in the furniture zone. 'Bulb-outs' at intersections would allow more space for outdoor dining, and all crosswalks would be constructed or accented with unit pavers to match the treatment of the clear zone.

New streetscaping should be provided along West Peachtree Street as well, extending from the Civic Center MARTA station to Hardy Ivy Park. The West Peachtree roadway section would be kept as currently designed, except for the addition of on-street bike lines in the zone normally occupied by parking. Sidewalks would be repaired or reconstructed as needed; and a 5' clear zone added with street trees spaced 30' to 40' on center. The intersection of West Peachtree and Simpson should be given special emphasis as the entrance to the symbolic center of Centennial Hill; intersection treatment should at a minimum match the standard used elsewhere along Simpson. Intersection improvements are also recommended at Simpson and Centennial Olympic Park Drive.



Figure 2.13: The view down Simpson Street toward the World of Coca-Cola showing the proposed streetscape and development character

Development along Simpson Street is envisioned to have six to ten stories with ground-floor storefront retail and restaurant space, if not continuous then concentrated in the vicinity of the intersections. Buildings should adhere to a consistent right-of-way line and should be designed to maximize the base-shaft-top expression stipulated in the proposed SPI-1 zoning district. Towers or tower-like elements, when present, should be located at corners facing intersections.

Recommendations:

- Provide new streetscaping including pavement repairs, street trees and lighting on both sides of West Peachtree Street between the Civic Center MARTA station and Hardy Ivy Park
- Provide pedestrian intersection improvements at the West Peachtree Street and Alexander Street, West Peachtree Street and West Peachtree Place and West Peachtree Street and Simpson intersections
- Reconfigure the Simpson Street cross-section to conform to the dimensions discussed above

- Provide new streetscaping including pavement repairs, street trees and lighting on both sides of Simpson Street between West Peachtree Street and Centennial Olympic Park Drive
- Provide pedestrian intersection improvements at the Simpson / Spring, Simpson / Williams and Simpson / COP intersections

3. COP Drive – Williams Street Improvements

As Centennial Hill evolves into its future as an ‘urban village’, it becomes increasingly important to transition streets from simple traffic conduits to public spaces. Williams Street was identified by a majority of stakeholder as requiring both traffic calming and an enhanced pedestrian environment. Because Williams is the major north-south ‘avenue’ through Centennial Hill, and because a great deal of southbound traffic would be redirected in the future on to Centennial Olympic Park Drive with the reconfiguration of the I-75/85 ramps, Williams is a prime candidate for a ‘road diet’. This project would convert existing travel lanes – at a minimum one lane on the east side of the street - to on-street parallel parking. The change would improve the pedestrian environment by reducing vehicle speeds, increase the available sidewalk area for streetscaping and outdoor dining, and allow shorter crossing distances at the Simpson and JSA intersections. It would also stimulate retail by providing convenient parking for existing and future land uses in the corridor.

Centennial Olympic Park Drive is also quite wide between Baker Street and Andrew Young International Boulevard. The spacing of intersections, the timing of signals and the frequency of southbound movements from Baker and International often result in pedestrian confusion as to crossing privileges; and traffic accelerating to make signals is intimidating to those trying to cross. Several stakeholders felt that a reduction in size of COP would benefit visitor traffic attempting to reach Centennial Olympic Park and would also improve the physical appearance of the parks’ eastern edge. The similarities between Williams and COP suggest another road diet; here the concept is to convert the western curbside lane on COP to parking from the Spring Street tunnel to Andrew Young International Boulevard. On-street parking would be limited to off-peak periods due to heavy vehicle traffic demands associated with events at Downtown venues, such as Phillips Arena. Some portion of the parking lane would be considered as a bus staging area for the Georgia Aquarium. The road diet would not have a negative impact on traffic flow, because the existing and future levels of off peak traffic are not anticipated to fully utilize the existing roadway capacity.

Recommendations:

- Convert the eastern (northbound) lane of Williams Street to on-street parking
- Convert the western (southbound) lane of Williams Street to on-street parking as permitted by roadway capacity
- Widen sidewalks on both sides of Williams Street and improve with street trees, landscaping and pedestrian lighting
- Improve the Williams-Simpson and Williams-JSA intersections with improved markings, signals and paving at crosswalks to improve pedestrian safety
- Specify storefront retail and restaurant future land uses at the intersections of Williams, Simpson and JSA, and stipulate that future development recognize these corners with architectural features such as towers or bays
- Convert the western lane of Centennial Olympic Park Drive to on-street parking between Baker Street and Andrew Young International Boulevard, utilized during off-peak hours

2.4 Mid-Term Priorities (3-7 Years)

Open Space and Parks

C. The JSA Linear Plaza

Alexander Street abuts an existing residential neighborhood to the north between Williams to Marietta Street. The new World of Coca-Cola and Georgia Aquarium visitor attractions both place their back door parking and service facilities along this stretch of Alexander. These developments will generate heavy truck and visitor traffic, adding to the traffic loads already in place on this important east/west connection. A proposed linear park, or greenway, through this corridor will help to improve the pedestrian walkability along JSA-McGill. The park will also help to soften the impact of increased traffic on the adjoining residential district.

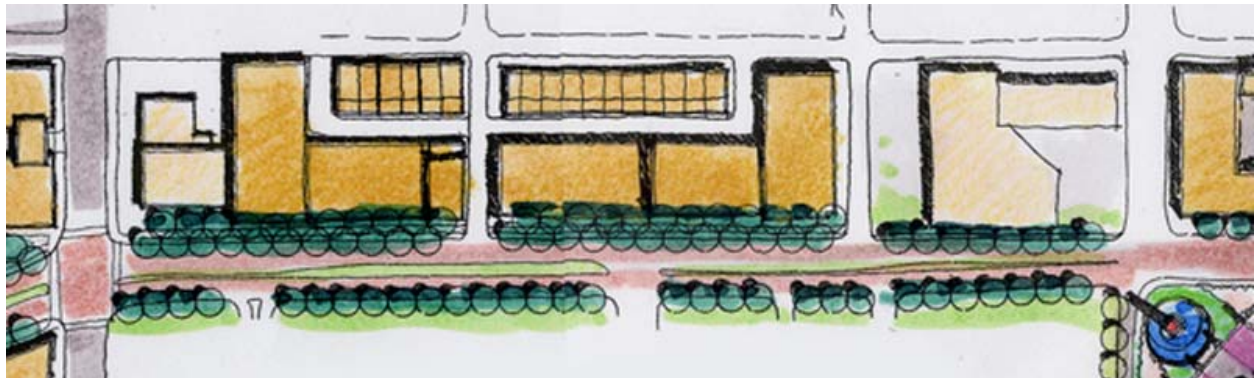


Figure 2.14: The JSA Linear Park / Plaza

A wide lawn with specimen trees and a generous sidewalk will provide needed greenspace and help to beautify JSA-McGill. It will also link to the Luckie Street PATH bikeway, improving the network of east/west pedestrian and bicycle connections, and to the Civic Center MARTA station. As the corridor redevelops over time, additional right-of-way purchases can implement the linear park system.

Recommendations:

- Establish a linear park and/or plaza with a pedestrian and bicycle path along the north edge of Alexander where sufficient right-of-way exists
- Incorporate consistent landscape details and streetscape elements with the JSA corridor construction and future redevelopment sites along JSA to the east to West Peachtree Street.

D. Civic Center Plaza

The current Civic Center plaza is seldom used and features an inhospitable design. The proposed Civic Center Plaza is the terminus of a larger pedestrian corridor running from MARTA's Civic Center Station, past Peachtree Street and the proposed park over the Interstate, and

down Currier Street to the Civic Center. This pedestrian-friendly corridor will establish the necessary level of synergy between each of these elements.

Specifically, the proposed plaza is envisioned as a public forecourt for a redeveloped Civic Center block. This plaza would be surrounded by new and revitalized uses: a new school in the current SciTrek building, a renovated Civic Center, and a new hotel, residential buildings and structured parking on the current parking lots. The plaza would feature a mix of hardscape and softscape elements arranged to provide an inviting entrance to the buildings as well as a pleasant passive-use space. It will be designed to accommodate the heavy but intermittent traffic of a school and the Civic Center.

Recommendations:

- Redevelop the Civic Center Plaza as the terminus of the Currier Street connection to MARTA and the forecourt to a redeveloped Civic Center block
- The City owns the land and thus maintains some degree of control over the site. The redevelopment of the plaza becomes a priority during the redevelopment of all or part of the block
- Design the plaza as both an inviting entrance to the buildings and a pleasant passive-use space. Design it to accommodate the heavy but intermittent traffic of a school and the Civic Center

Transportation/Circulation Improvements

4. Reconfiguration of the I-75/85 Interchange Ramps

I-75/85 (the Downtown Connector) is a major asset for the JSA-McGill corridor, but also a major detriment. Besides the fact that it breaks the street grid and severs connectivity between blocks, it imposes a high volume of traffic – both entering and exiting the interstate – on the JSA and Williams Street intersection. To mitigate this problem and to improve access to and from the study area, the proposed project would reconfigure the Williams Street ramps to provide new connections between the study area roadway network and the interstate.

The existing ramp configuration focuses all traffic entering and exiting the freeway system into a single intersection - Williams Street and Alexander Street (JSA). This results in traffic congestion and high travel speeds along Williams Street from traffic exiting and entering the freeway. The proposal would reconfigure the ramps through several major improvements. First, the existing Williams Street interstate exit would be reconfigured so that two lanes would drop down into the Spring Street Connector tunnel redirecting traffic to COP Drive. One lane would peel off to the left to maintain access to Williams Street southbound. Second, a new single-occupancy vehicle entry ramp would be built to the north of JSA on northbound Spring Street for access to both northbound and southbound interstate lanes. Finally, the existing Williams Street on-ramp would be converted to HOV-



Figure 2.15: Reconfiguration of the interstate access ramps

access only, effectively redistributing current on-ramp traffic to two access points. Spring Street northbound through Downtown – one-half of a one-way pair with COP Drive – would more logically feed directly to an interstate access point.

This reconfiguration would reduce traffic volume and speed on Williams Street, reduce intersection congestion at Williams and JSA, and direct vehicles more efficiently to the Baker Street entrance and drop-off of the Aquarium. As an associated improvement, the ramp approaches and embankments could be landscaped in formal manner to indicate the northern approach into Downtown.

Recommendations:

- Realign two lanes of the single occupant vehicle (SOV) exit ramp from Downtown Connector southbound to penetrate the Spring Street tunnel feeding to COP Drive (the third existing exit lane would continue to connect directly to Williams Street); and
- Relocate the single-occupancy vehicle entry ramp to the northbound Downtown Connector to Spring Street north of JSA (behind the existing Boomershine Building)
- Reconfigure the interstate landscaping to respond to the new ramping arrangement and mark the entry to Downtown

5. Baker – Harris Two-Way Conversion

The future traffic load imposed on local streets by the opening of the Georgia Aquarium and the World of Coca-Cola will function best if distributed over as many streets as possible in the study area. Just as an additional interstate ramp will relieve traffic congestion on the Williams and Alexander intersection, additional flexibility in routes out of the area will reduce congestion on any one street. Key to utilizing the local street network is the notion of converting Baker and Harris to allow two-way travel from COP Drive to Piedmont Avenue.



Figure 2.16: Baker Street Improvements

Currently, these streets function as a one-way pair with Baker providing four travel lanes westbound and Harris providing four travel lanes eastbound. Under the proposal, both streets would be restriped to provide two travel lanes in each direction. This improvement would allow for additional routes connecting Centennial Olympic Park and the surrounding attractions to the Downtown Connector and the hotel district to the east, as well as improve the pedestrian environment by reducing travel speeds. Depending on level of service, on-street parking could be figured into portions of the restriping. Since Baker is identified as the candidate for a multiuse-path connection to Freedom Park, this would likely leave little space for parking. Harris, however, could incorporate on-street parking with one lane of traffic in either direction, at least at the western end where vehicular volumes are less than those feeding Piedmont and Courtland.

Recommendations:

- Restripe Baker Street from one-way to two-way traffic east of COP Drive, taking into account a future multiuse path connection to Freedom Park on the south side of the street
- Restripe Harris Street from one-way to two-way east of COP Drive
- Investigate the possibility of providing on-street parking on all or portions of Harris Street

6. Municipal Parking Structures

A key determinant of the success of proposed new development, particularly within the Centennial Hill mixed-use village, will be the financial feasibility to provide structured parking. The physical dimensions of many of the blocks within the JSA-McGill LCI study area provide challenges on the ability to sensitively fit new structured parking decks within proposed projects. More importantly, the scale and financial returns of proposed projects, particularly housing, need a more comprehensive approach to provide needed parking within an economical framework. The idea behind the proposed project is that public/private joint use structured parking would be built as part of new development at strategic locations within 2 blocks of major new developments. Ideally, residential projects in particular could share structured parking outside of their development footprint.

It is suggested that a strategy of creating municipal parking, perhaps with financial assistance from the Tax Allocation Districts, be pursued. Given the implications of the amount of parking needed for all of Downtown, it is suggested that the creation of a Municipal Parking Authority that could construct and operate public parking decks throughout Downtown, including JSA-McGill, should be studied. A less involved strategy could be the provision of banks of public parking within new developments that are utilizing structured parking in exchange for financial assistance for the parking decks.

Recommendations:

- Study of Municipal Parking Authority
- Use of Tax Allocation Bonds for financing of public/private joint use structured parking decks

2.5 Long-Term Priorities (7-25 Years)

Open Space and Parks

E. Expanded Mayor's Park

The most significant and far-reaching proposal to emerge from the stakeholder interviews and the public workshops during the JSA-McGill LCI process was the idea of bridging the interstate on both sides of Peachtree Street with a new city park. Several factors suggest that this is the logical conclusion to public improvements in the area. First, although the Civic Center MARTA station was, in part, identified and built to serve the Civic Center, the street connection between the two was disadvantaged by a lack of wayfinding clarity, a forlorn built environment and the presence of aggressive panhandlers. CODA improvements before the Olympics sought to rectify this by creating a better, more gracious route across a new park at St. Luke's Episcopal Church and down an intimate tree-lined Currier Street. Despite this, few Civic Center patrons use MARTA; the negative perceptions have lingered.

CODA also attempted to lessen the impact (or at least celebrate) the presence of the interstate by creating two 'folk art parks' at the intersections of Ralph McGill and Courtland and Baker and Piedmont. The parks feature whimsical kinetic folk sculpture but suffer from the hard environment and a lack of shade. A similar attempt at softening the interstate edge is the tiny Mayor's Park on the northeast corner of McGill and Peachtree. Hardly one-fifth of an acre in size, the park is little more than a landscaped shoulder patronized only by the homeless. On the other side of Peachtree Street, the old alignment of Alexander – which turned north to intersect with Peachtree – abruptly ends in a chain-link barrier with the interstate beyond.

The idea of uniting these disparate parts with a new park has been around for several years, gaining some momentum after the Olympics between its sponsors and some members of the philanthropic community. The idea – and the \$20 million price tag - was floated to GDOT, with mixed reaction; GDOT supported the idea in concept but not in funding. Since then, the project has been put aside, waiting for public circumspection of the surrounding area to catch up.

The looming improvements to JSA-McGill cast the interstate cap project in a new light. The emerging importance of JSA-McGill as the principal east-west connector at the north end of Downtown flares at its most symbolically important intersection, Peachtree Street. The open swath cut by the interstate has created – unwittingly – a marked entry point into Downtown from the north; the vistas unimpeded by development have given the intersection the feeling of a natural center or a place of departure similar to the infrastructural radiance of Five Points. Yet, approaching Downtown from the north, the severed Alexander Street tempts with a view of Centennial Hill; the Medical Arts building suggests the beginnings of an urban edge.



Figure 2.17: the expanded Mayor's Park

The proposal for the expanded Mayor's Park is essentially a great lawn filling in the void between St. Luke's, McGill and Peachtree. The existing folk art plazas would remain at the McGill and Courtland intersection but would be improved with shade structures and raised plantings. The park's northern edge is formed by an extension of Currier Street, paved in brick to match the entry to St. Luke's, and defined by future development on the St. Luke's property. The 1878 Gay House, occupying pride of place in the northeast corner, could return to the type of program it had as the former home of the Atlanta Shakespeare Company.

Across Peachtree to the west, Alexander is proposed to be extended over the interstate in the same small profile as Currier, either as a limited-access or a pedestrian-only street. The triangular plaza bounded by Peachtree and Alexander is envisioned to contain a significant monument or fountain, foregrounding a restored Medical Arts Building. This plaza marks the entry to Downtown, and could contain a low-rise signature building housing an ACVB welcome center. The plaza might be paved with the same brick as Currier Street, forming the design linkage to the Civic Center.

The western edge of Alexander overlooking the interstate is treated as a broad promenade and might contain reproductions of the original Hamburg Friendship Light on display at the Civic Center. A portion of the promenade would continue into Centennial Hill, while the balance would turn and hug the southern flank of the interstate, framing the void and leading to the MARTA station. A long-term option would be the continuation of the cap to the station leveraged by private air-rights development. The south side of McGill, currently occupied by surface parking, is intended to develop as high-density residential completing the urban enclosure of the park.



Figure 2.18: *Looking south on Peachtree at Mayor's Park, with Centennial Hill and the Alexander promenade and plaza at the left*

Recommendations:

- Construct a new park over I-75/85 between Peachtree, McGill and Courtland
- Extend Currier Street to the west to form the northern boundary of the park
- Extend Alexander Street north over I-75/85 to intersect with Peachtree and Currier

- Construct a new plaza between Peachtree and the extended Alexander Street that contains elements of other parks and plazas along JSA-McGill
- Renovate the Medical Arts Building and investigate the possibility of a visitor's or welcome center in the plaza
- Encourage future high-density residential development on the surface parking frontage south of McGill

F. Georgia World Congress Center Phase V Mall

GWCC's strategic expansion north along Northside Drive presents the opportunity to create a gateway into the convention district and the JSA-McGill corridor on the west side. The new bridge and road alignment open up a central foreground space that visually links Phase IV with the Phase V expansion. The new open space introduces a park amenity that complements both the convention district and the residential neighborhoods to the west.

Plantings and civic monuments along the new mall work to knit a strand of park into the length of the JSA-McGill corridor. Ultimately, the mall helps to build a sense of arrival into the JSA-McGill corridor, the convention district, and the Centennial Olympic Park area's many attractions.



Figure 2.19: GWCC Phase V Mall



Figure 2.20: Intersection of Northside Drive and JSA corridor looking northeast with the proposed GWCC Phase V expansion



Figure 2.21: Intersection of Northside Drive and JSA corridor looking northeast with the proposed GWCC Phase V expansion

Recommendations:

- Utilize the abandoned right-of-way between the previous and new alignment of JSA-McGill at Northside Drive for a public mall.
- Build the mall as monumental green space and locate civic fountains and sculptures sequentially along its length.

Transportation/Circulation Improvements

7. The Baker Street PATH Project

As mentioned above, the PATH foundation is actively involved in creating a network of bike and pedestrian trails around Atlanta. As a part of their Downtown project, Baker Street has been identified for a trail connecting Centennial Olympic Park with the Freedom Parkway trail. The proposal recommends widening the sidewalk on the south side of Baker Street and providing a landscaped buffer between the street and sidewalk along with street-trees and pedestrian scaled lighting to improve pedestrian safety. This wide sidewalk will also include a striped bike-lane to separate bicycles from pedestrians. Creating this new trail in addition to converting Baker into a two-way street will completely change the character of this street from a vehicular avenue to a pedestrian supportive street.

New developments like the Aquarium and proposed World of Coca-Cola fronting Baker Street are expected to attract a large number of tourists every year. In addition to these proposed facilities, Centennial Olympic Park and large commercial establishments such as the Inforum and AmericasMart complex located along Baker Street already have considerable pedestrian activity. Investment in this path project will increase this pedestrian activity and encourage transit usage.

Recommendations:

- Provide streetscape improvements including a bike-ped path and new sidewalks to the south side of Baker Street.

8. Piedmont Improvements

Piedmont Avenue was identified through the public participation process as a street that requires immediate attention. Currently a five lane one-way street, it functions as the northbound route of a one-way pair with Courtland Street. Carrying heavy volumes of vehicular traffic at high speeds, Piedmont Avenue creates a difficult and unsafe pedestrian environment as it moves through the study area. With growing residential, retail and institutional uses along this street, improving the pedestrian environment is of utmost importance. In particular, residents at 450 Piedmont and other housing developments around Renaissance Park will benefit from this pedestrian environment. Georgia State University is proposing a 1000-bed student housing project just south of the study area, which would add to the pedestrian activity in the Piedmont corridor.

The plan proposes streetscape improvements along Piedmont Avenue including additional pedestrian street lighting, utility relocation, new sidewalks, bike lanes and enhanced transit stops. Bulb-outs at intersections decrease crossing distance for pedestrians. Transportation studies have shown that Piedmont Avenue has excess vehicular capacity making it an ideal candidate for a “road diet” (narrowing road width to become leaner, safer and more efficient). Converting one lane into an on-street parking lane would provide traffic calming and increase the perception of pedestrian safety. In addition, on-street parking will help support existing retail at Piedmont and Linden Avenue and encourage future retail establishments along the corridor. Intersection improvements with redesign for pedestrian crossings and signal efficiency would be required at Piedmont and Ralph McGill Boulevard.

Recommendations:

- Provide streetscape improvements along Piedmont Avenue.
- Provide intersection improvements at Piedmont at Ralph McGill Boulevard.
- Create a lane for on-street parking along Piedmont.

2.6 Corridor Development Program

The JSA-McGill LCI Corridor Development Program provides summary information regarding each land use initiative including:

- Approximate acres of development and redevelopment
- Approximate number of residential units
- Expected residential density
- Amount of retail and commercial square footage
- Amount of new office space
- Complementary transportation improvements
- Necessary regulatory changes

The information included in the corridor development program leads to the 25-year population and employment projections in Section 3.0 Action Plan

In total, the JSA-McGill LCI Plan includes:

- Approximately 4,710 proposed residential units
- Approximately 250,625 square feet of new retail / commercial establishments
- Approximately 2,223,725 square feet of new office space

Table 2.1: Corridor Development Program

CORRIDOR DEVELOPMENT PROGRAM										
District	Proposed Residential Units	Proposed Retail Area (sq.ft.)	Proposed Office Space (sq.ft.)	Live/Work (sq.ft.)	Proposed # of Hotel Rooms	Proposed School (sq.ft.)	Proposed Number of Private Parking Spaces	Proposed Number of Public Parking Spaces	Convention Space*	Projects
A. GWCC			125,000		500		8,000		1,383,000	
Short-Term Projects										
Mid-Term Projects										
Long-Term Projects										Phase V Mall
B. Aquarium/Marieita	155	16,000		131			401			Marieita-JSA Plaza, Luckie St. Improvements JSA Linear Plaza
Short-Term Projects										
Mid-Term Projects										
Long-Term Projects										
C. The Village	3,214	117,000	1,992,500				6,556	3,004		Spring-COP Plaza, COP Drive/Williams St. Improvements, Simpson-W. P-tree Streetscape Reconfiguration of I-57/85, Baker/Harris two-way, Municipal Pkg. Expanded Mayor's Park, Baker PATH Project
Short-Term Projects										
Mid-Term Projects										
Long-Term Projects					200	167,000		3,277		
D. SoNo	1,314	117,625	106,225							
Short-Term Projects										
Mid-Term Projects										
Long-Term Projects										
Grand Total	4,683	250,625	2,223,725	131	700	167,000	18,234	3,004	1,383,000	Civic Center Plaza Piedmont Improvements

* Includes Exhibit Space (500,000 sq.ft.), Meeting Rooms (90,000 sq.ft.), Ballroom (43,000 sq.ft.) and Business Center (up to 750,000 sq.ft.)

3.0 Action Plan

- 3.1 Strategic Recommendations
- 3.2 Regulatory Enhancements
- 3.3 Five- Year Action Plan
- 3.4 25-Year Projections
- 3.5 LCI Goals



JSA McGill LCI Plan

Prepared by: **Urban Collage, Inc.** in association with

Cooper Carry, URS Corp., HPE, ZVA, ZHA, Verge Studios, Biscuit Studios & PEQ

3.1 Strategic Recommendations

As described earlier, the JSA-McGill LCI Study forms a critical piece of an overall planning/development strategy being developed for all of Downtown Atlanta as part of the "Imagine Downtown" process. This process seeks to build upon past plans for Downtown and its districts and build on the inherent physical and economic strengths of major development "Focus Areas." The JSA-McGill LCI study area is thought of as the "most ready for primetime" Focus Area. With the immediate improvements to the Georgia Aquarium and World of Coca-Cola block and the transportation improvements associated with those new destinations, the JSA-McGill LCI study area represents a very short-term priority for investment and a true opportunity for public/private partnership.

In the next few years, efforts will be strategically directed towards the construction of the Georgia Aquarium, World of Coca-Cola and the infrastructure needed to support employees, visitors, and residents of the area. The number of the visitors that will populate the Centennial Olympic Park area surrounding these destinations provides a huge opportunity for the creation of supportive retail development. Consciously, the JSA-McGill LCI study includes a mix of several thousand new residential units, several million square feet of new office development, and a major new retail corridor along Simpson Street. This mixed-use development is designed to take advantage of the physical development opportunities within the study area to create an active 24-hour urban environment with activity at all times of the day.

The JSA-McGill LCI study also contains one of the rarest of opportunities to create a new urban neighborhood at Centennial Hill, stretching across Peachtree Street to the parking lots of the Civic Center, possibly supported by a first-class Downtown school to serve residential development. This new neighborhood surrounding Simpson Street can provide the opportunity for new housing for over 4,000 new residents in the area.

The public improvements plan provides the opportunity to balance improvements for vehicular access, by both automobiles, access to and from shuttles/buses with pedestrians and bicyclists. The plan contains:

- 1) Improvements to the Downtown Connector (I-75/85);
- 2) The enhancement of east-west circulation through reconstruction of the JSA corridor;
- 3) Consideration for new on-street parking;
- 4) The creation of a pedestrian corridor system along JSA, Baker, West Peachtree, and Simpson including key intersections and sidewalks;
- 5) Improvements for regional bus access to the Civic Center area;
- 6) Study of the possibility of re-instituting two-way streets on Baker and Harris;
- 7) Enhancements to utilization of the Civic Center and Peachtree Center MARTA Stations;
- 8) Development of the City's first "urban bike/ped path" along Luckie and Baker;
- 9) Pedestrian and vehicular wayfinding signage improvements as part of the area-wide effort for Downtown and Midtown.

How will this be accomplished? The LCI Study and Imagine Downtown have brought together all of the key participants in a successful implementation plan: residents, property owners, the City, the Atlanta Development Authority and major institutions. The existing Westside Tax Allocation District (TAD) and new Eastside TAD provide an opportunity for public sector leverage of planned improvements and private investment.

Much of the property in the JSA-McGill corridor is in the hands of developers with active plans for new development consistent with the objectives of the LCI plan. These are not property owners

holding property for speculation, which bodes well for short-term development projects. The first step, a consensual physical vision, is now in place through the LCI Study. However, it will take public investment in infrastructure, particularly public improvements to area streets and financial assistance in the construction of structured parking, to make these projects feasible. Over time, public investment should by design decline as the private sector accelerates its activities. This trend has occurred recently just north of the study area in Midtown and the time is right strategically to instigate comprehensive revitalization in the JSA-McGill corridor.

The key players in implementation are:

- 1) Central Atlanta Progress - the sponsoring organization will continue its focus on Downtown-wide improvements and its role in facilitating study and implementation of planned recommendations;
- 2) Downtown Transportation Management Association (TMA) – this organization will continue to focus on transportation issues in Downtown
- 3) Atlanta Downtown Improvement District- this self-taxing district that encompasses most of the study area provides a mechanism for continuing ongoing beautification and safety programs and the local funding match that can leverage other local, state and federal infrastructure programs;
- 4) The City of Atlanta- the city's role will be passage and enforcement of new regulatory improvements and support for new public infrastructure investment;
- 5) Atlanta Development Authority- as part of its focus on Downtown development, ADA can play a critical role in the financing of new development through City financial programs and the implementation of the TAD's;
- 6) Regional Agencies- the Atlanta Regional Commission, Georgia Regional Transportation Authority, Metropolitan Atlanta Rapid Transit Authority (MARTA) and the Georgia Department of Transportation all have roles in the funding and implementation of key public improvements recommended;
- 7) Institutions- faith-based institutions, public institutions and other non-profits add to the vitality and activity of the district through their activities, programs and outreach;
- 8) Property Owners- the area property owners will bear the greatest responsibility for the implementation of major new development on vacant/underutilized property;
- 9) Atlanta Downtown Neighborhood Association- the emerging and strong Downtown residential association can continue its role in increasing housing opportunities and supportive services as well as communications among Downtown's growing residential population.

All of the entities working together towards the vision established can quickly help create one of Atlanta's most desirable new urban district- a place to live, work, shop, recreate and be entertained.

3.2 Regulatory Enhancements

Unlike many LCI study areas, the JSA-McGill study area has a conducive regulatory framework already in place in the form of Special Public Interest (SPI) zoning districts #1 and #13. These existing regulations allow and encourage mixed use, pedestrian orientation and good urban design principles of building buildings at the street, articulating blank facades and hiding service uses. As part of a comprehensive update to these SPI districts, Central Atlanta Progress and the City of Atlanta have created the Downtown Livability Code (DLC), as described earlier. The DLC was begun a year and a half ago and is set to go to City Council for adoption at the beginning of 2004. The DLC offers more definitive standards for streets and streetscapes, allowable uses, and support of transit/alternative transportation. It represents one of the most progressive "smart growth" codes in the Atlanta region and can be a model for other higher-density, mixed use districts.

3.3 Five-Year Action Plan

The JSA-McGill LCI Plan contains a heavy focus on immediate five-year actions to take advantage of the momentum that is being created with the investment of the Georgia Aquarium and World of Coca-Cola on the western end of the corridor and rejuvenation of the Civic Center block on the eastern end. Many of the public improvements planned in the first five years support transportation mobility improvements, particularly east-west movement in support of the major regional destinations under construction. They also lay the foundation for private investment that is planned in the corridor. Five-year projects include the following:

- New streetscapes on West Peachtree Street and Simpson Streets;
- New gateway parks and plazas along JSA-McGill corridor;
- Downtown Connector (I-75/85) and William Street interchange improvements;
- Traffic calming and on-street parking in Centennial Hill;
- Multiuse trails connecting Downtown to regional destinations;
- Downtown Livability Code regulatory enhancement, and;
- The Eastside Tax Allocation District (TAD) projects

Table 3.1: Five- Year Action Plan

JSA MCGILL FIVE YEAR IMPLEMENTATION PLAN

Transportation Projects

#	Description	Type of Improvement	Engineering Year	Engineering Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Match Source & Amount
1	Luckie Street Improvements New traffic-separated multiuse trail with landscaped shoulders down center of right-of-way (priced); alternately on-street parking on one or both sides of street with multiuse trail on west side as part of sidewalk reconstruction	Vehicular / Pedestrian (3,386 lf)	2004	\$230,248	2005-2006	\$2,302,480	\$2,532,728	City / Private (PATH)	City / PATH	City / PATH TBD
2	Simpson - West Peachtree Streetscapes New streetscapes to connect MARTA rail stations with Georgia Aquarium / World of Coca-Cola / Children's Museum and Centennial Hill residential neighborhood; extends on West Peachtree from Civic Center station to Hardy Ivy Park and on Simpson from West Pea	Pedestrian (6,000 lf)	2004	\$270,000	2005-2006	\$2,700,000	\$2,970,000	City / Private (CAP)	ARC / City / Private (CAP)	City / Private (CAP) TBD
3	COP Drive - Williams Street Improvements On-street parking on one or both sides of Williams Street from Baker to Alexander, with accompanying streetscape improvements; Off-peak on-street parking on west side of COP Drive from Baker to Andrew Young International	Vehicular / Pedestrian (1,770 / 930 lf)	2005	\$88,748	2005-2006	\$887,475	\$976,223	City	City	City TBD
4	Reconfiguration of Interstate Ramping Realigning I-75/85 southbound exit ramp to penetrate Spring Street Connector tunnel; new SOV northbound / southbound entry ramp from Spring north of Alexander; conversion of existing northbound / southbound entry ramp to HOV only; new median / embankment	Vehicular / Landscape (1,500 lf)	2006 - 2007	\$559,000	2008 - 2009	\$5,590,000	\$6,149,000	GDOT	GDOT	GDOT TBD
5	Baker - Harris Two-Way Convert Baker Street and Harris Street to 2-way operation from COP Drive to Piedmont Avenue	Vehicular / Intersection (6,036 lf)	2006	\$140,000	2006-2007	\$1,400,000	\$1,540,000	City	City	City TBD
6	Municipal Parking Structures New municipal parking authority; public and/or public/private structured parking projects at various locations in Centennial Hill and throughout JSA-McGill corridor	Vehicular (3,000 sp)	2007 (Authority)	\$4,500,000	2008 and on	\$45,000,000	\$49,500,000	City / Private	City / Private	City / Private TBD
7	Baker Street PATH Project Streetscapes on Baker Street from COP Drive to Piedmont Avenue (one side only); new multiuse path / streetscape along the south side of Baker Street from Luckie Street to Freedom Parkway	Pedestrian (3,018 / 6,800 lf)	2007	\$640,410	2007-2009	\$6,404,100	\$7,044,510	City / Private (PATH)	ARC / City / PATH	City / PATH TBD
8	Piedmont Improvements Streetscapes on both sides of Piedmont from Baker to Pine (to continue to North Avenue); on-street parking on east side of Piedmont from McGill to Pine (possibly to continue to North Avenue)	Vehicular / Pedestrian (3,864 lf)	2008	\$173,880	2008-2009	\$1,738,800	\$1,912,680	City	ARC / City	City TBD
Totals				\$6,602,286		\$66,022,855	\$72,625,141			TBD

Land Use / Housing Projects / Initiatives
Public / Open Space Projects

Description/Action	Cost	Year	Responsible Party	Funding Source
A Marietta / JSA Plaza New public park / plaza and fountain at vacant triangular parcel between Luckie and Marietta along JSA	TBD	2005-2007	State / City / Private	State / City / Private
B Spring - COP Plaza New plaza at intersection of Spring Street / COP Drive eliminating northbound deceleration lane; includes bridge enhancements and embankment landscaping	TBD	2005-2008	State / City / Private	State / City / Private
C JSA Linear Plaza New greenway / plaza in expanded right-of-way on north side of JSA between Luckie and COP Drive	TBD	2005-2006	State / City / Private	State / City / Private
D Civic Center Plaza Reconstructed / expanded entry court / drop-off as part of Civic Center repositioning, future site intensification	TBD	2007-2009	City / Private	City / Private
E Expanded Mayor's Park New open space 'cap' over I-75/85 on both sides of Peachtree Street bounded by Currier, Courtland, McGill and Alexander	TBD	2008-2010	State / City / Private	State / City / Private
F GWCC Phase V Mall New linear greenspace along JSA realignment from Northside Drive to railroad viaduct; part of Phase V expansion of GWCC with sculptural pylons similar to International Plaza	TBD	2009 - ?	State / City / Private	State / City / Private

Other Local Initiatives

Description/Action	Cost	Year	Responsible Party	Funding Source
Eastside TAD Create tax-allocation district incorporating portions of JSA McGill corridor to leverage public improvements such as streetscapes and municipal parking structures and encourage redevelopment	Complete	2003	City / County	City / County
Downtown Livability CodeZoning Review and update Special Public Interest (SPI) district 1	Ongoing	2003-2004	City / Private	City / Private

3.4 25-Year Projections

The following table displays 25-year population and employment projections for the LCI study area as requested by the Atlanta Regional Commission. These tables estimate the projected population and employment growth within the study area based on the development program proposed for this corridor in addition to the market absorption analyzed by the market consultants ZHA, Inc. and ZVA, Inc. The tables assume the successful implementation of the LCI land use and transportation initiatives described in the previous sections.

Estimated New Development (Based on LCI Plan):

Residential	4,683 units
Retail	250,625 SF
Office	2,223,725 SF
Live/Work	131 units
Hotel	700 rooms
Convention Space (GWCC Expansion)	1,383,000
Business Center	750,000 SF

Table 3.2: 25- Year Projections:

ASSUMING INVESTMENT WITH LCI GRANTS AND OTHER CITY INFRASTRUCTURE¹						
	2003²	Projected				
		2005	2010	2015	2020	2025
Population³	2,404	3,800	6,700	9,400	10,300	-
Housing Units	1,202	1,900	3,700	5,500	6,016	-
Employment⁴	15,564	17,648	19,732	21,816	23,900	25,983

¹ Assumes equal distribution of new office/retail development

Housing calculations are based on the ZVA Market analysis absorption rates explained in table 3 Appendix section 4.0

Assumes 100% occupancy for projected development

² The calculations for population and employment are based on survey counts of residential units and office space within the study area conducted by Urban Collage, Inc. and ZHA, Inc.

Average household size estimated as 2.0 persons/HH

³ Average household size is projected to decrease from 2.0 in 2003 to 1.71 in 2020.

⁴ Employment calculations assume 250 SF/person for Office, 350 SF/person for Retail and 1000 SF/person for hotel and 250 SF/ hotel room.

3.5 LCI Goals

The following section describes how the JSA-McGill Livable Centers Initiative (LCI) plan addresses each of the 10 study LCI program requirements developed by the Atlanta Regional Commission.

1. Efficiency/feasibility of land uses and mix appropriate future growth including new and/or revised land use regulations needed to complete the development program.

The JSA-McGill LCI Plan promotes a mix of retail, residential, office, institutional facilities and open space throughout the corridor. The development of private land and open space are keys to the future growth of the area. The major institutions that are woven throughout the JSA-McGill Study area are a strength that will enhance the program of a mix of housing and retail (guided by the economic market study). The strategic placement of retail and residential is punctuated by open space that promotes connectivity within the Study Area as well as to adjacent neighborhoods. A new land use classification of live/work space for double frontage buildings will ultimately contribute to the future growth in the area by utilizing mixed-use as a solution for a difficult site.

An update of the current zoning is currently underway. The Study Area lies partially within the SP-1 area which promotes a more pedestrian friendly, mixed-use environment in Downtown with special incentives to encourage housing. The proposed ordinance also includes supplemental development standards, which will guide the character of the built environment and public realm.

2. Transportation demand reduction measures

Concentration of uses within the LCI area and provisions for new connections to MARTA and parking facilities should reduce transportation demand. The realignment of the I-75/85 exit ramp will help to alleviate congestion on JSA. Strategically placed medians and single turn lanes will assist in traffic calming. The conversion of current one-way portions of JSA and West Peachtree Street into a two-way road and the wider reliance on the local street network will also facilitate in the reduction of traffic. By promoting a pedestrian-friendly environment to the currently underutilized MARTA stations, possibility of a circulator/shuttle to link destinations, eliminate multiple parking sites, the need for vehicular transportation within the JSA area will be reduced.

3. Internal mobility requirements- traffic calming, pedestrian circulation, transit circulation, bicycle circulation including safety and security of pedestrians

The implementation of new sidewalks, lighting and crosswalks will enhance pedestrian circulation and safety. In addition to new street furnishings, new bike lanes and on-street parking will encourage various forms of transportation, as well as be a measure for traffic calming. Medians will also be used as a traffic calming tool. The sequence of open spaces along JSA-McGill will provide a basis for pedestrian concentrations and movements along the corridor. The proposed first, unique urban bike-ped path connecting to existing trails will provide better accessibility.

4. Mixed-income housing, jobs/housing match and social issues.

The Plan calls for a mix of high and medium density housing along the corridor to build upon the increasing residential development in Downtown Atlanta. This includes the new mixed-use district along Simpson Street, infill housing along Marietta Street, and multifamily housing on the Civic Center surface parking area.

The proposed zoning code update also provides additional incentives for providing mixed-income or workforce housing in new developments. These proposed housing developments will help reduce the existing jobs to housing ratio and provide an active 24-hour environment in Downtown.

5. Continuity of local streets in study area and development of a network of minor roads

The reconfiguration of the minor street network will enhance the pedestrian realm as well as provide connectivity throughout the corridor. The redesign of Baker and Harris from a one-way to a two-way vehicular corridor will provide additional route flexibility between the Aquarium and World of Coca-Cola and I-75/85, as well as provide additional routes for local traffic.

6. Need/identification of future transit circulation systems and line haul routes

Future transit demand in the area will likely be increased by future development within the corridor. Currently, the two MARTA station within the JSA corridor are underutilized and should gain ridership as the area develops. In addition, the routing of bus lines to service new development around the Aquarium and World of Coca-Cola has been studied to manage traffic flow and identify new traffic routes. The proposed shuttle/circulator will additionally enhance transit connectivity.

7. Connectivity of transportation system to other centers (MARTA rail and bus, auto, shuttle, bike and pedestrian)

The variety of transportation options contained within the JSA-McGill corridor will increase connectivity to adjacent neighborhoods and other areas due to its location near I-75/85. The connection of linear parks allows pedestrian mobility to the various transit nodes. Further, roadway improvements in and around the area will provide for through traffic for commuters, residents, and visitors.

8. Center development organization and management, promotion and economic restructuring

Improvements and implementation of the LCI plan will be managed and developed by Central Atlanta Progress with assistance from ARC and other entities such as the City of Atlanta. CAP has partnered with numerous public and private entities and has gained experience, through collaborations and long-time relationships, to coordinate the steps necessary to turn vision into reality and plans into action.

9. Stakeholder participation/support

A significant portion of the work done on the JSA-McGill LCI study involved public participation, and this took many different forms. As part of the *Imagine Downtown* process, JSA-McGill was publicized as one of five focus areas requiring planning attention. Dates and times of all public events were posted on the Central Atlanta Progress website (<http://www.atlantadowntown.com>) as well as the website dedicated to *Imagine Downtown* (<http://www.imaginedowntown.com>). E-mail comments were welcomed and encouraged. Several questions in the online 'Imagine Survey' were directed toward development in the JSA McGill corridor. The centerpieces of the public involvement process were three public workshops; the second being a three-day long 'Charette Week' designed to build awareness and excitement through an intense set of collaborative exercises. The initial exercises included an 'issues' and 'community mapping' exercise, and an opportunity and challenges exercise for the corridor. The three-day long charette exercises included group consensus on design, land use, circulation, open space and identity with the final public workshop asking the participants to prioritize their preferred projects.

10. Public and private investment policy

Central Atlanta Progress is fortunate to have strong connections with developers in the Downtown area. As such, CAP will work with entities such a proposed municipal parking authority and the private sector to form partnerships that will begin to provide the foundations for new neighborhoods and a revitalized corridor.

4.0 Appendix

- 4.1 Public Participation
- 4.2 Market Study Reports



JSA McGill LCI Plan

Prepared by: **Urban Collage, Inc.** in association with

Cooper Carry, URS Corp., HPE, ZVA, ZHA, Verge Studios, Biscuit Studios & PEQ



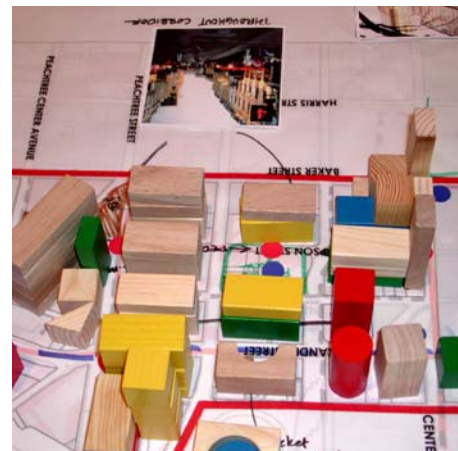
JSA-McGill Livable Centers Initiative (LCI) Study

Planning work for the Jones/Simpson/Alexander-McGill corridor has been completed as a pilot project of the Imagine Downtown process. The effort was supported by a Livable Centers Initiative planning grant from the Atlanta Regional Commission.

**This update information is a summary compiled from the website.
For more details visit the CAP/ADID Initiatives page at www.atlantadowntown.com**

Our first workshop was a great success thanks to excellent participation!

On Tuesday, September 16th, over 100 people came to AmericasMart to participate in a hands-on workshop to determine the best ways to revitalize the neighborhoods within the Jones-Simpson-Alexander/Ralph McGill Corridor LCI study area. Attendees included Downtown residents, real estate developers, government officials, business owners and landowners.



The Process

Participants broke up into small groups to work together to brainstorm and collectively decide on the type of neighborhood that the JSA-McGill corridor should become. Four separate exercises focused on land use, transportation/circulation, parks and open space and neighborhood identity and image. Participants had to jump in with scissors, tape, markers, dots and building blocks to:

- Identify building types and forms that were appropriate
- Locate where ground floor retail uses should be concentrated
- Classify streets by the level of desired pedestrian activity
- Locate appropriate locations for on-street parking
- Designate land for parks, green space and open space
- Identify significant gateways and gathering places

Ideas

The creative ideas that came out of the workshop were presented on Thursday afternoon, September 18th, to another large crowd. The participants unanimously want to see the JSA-McGill corridor become a dense neighborhood, filled with more mid- to high-rise residential buildings, as well as independent

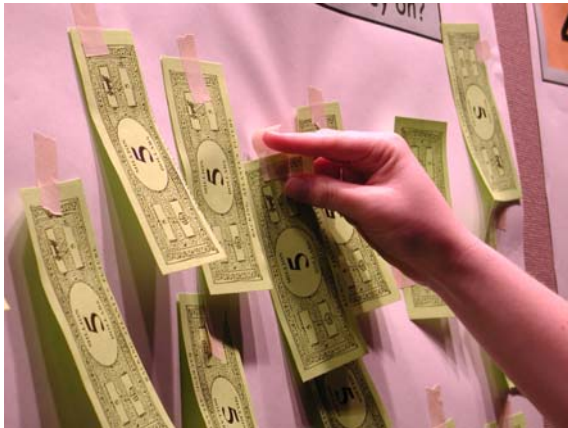
retailers. The goal is to turn this area into a comfortable, livable place that creates a sense of community. Among the ideas introduced were: a new private school, a circulator shuttle system to serve the Civic Center MARTA station and area attractions and a park to bridge across I-75/85 between Peachtree and Courtland.

The Vision

Overall the vision for the corridor can be described as:

- A place of arrival...Downtown gateways
- A place to live...Centennial Hill village
- A place to relax...a new park over the Interstate
- A place to walk...Marietta, McGill, Simpson, West Peachtree
- A place to eat and shop....Simpson, Luckie, Marietta

After the presentation, participants were asked to help the consultant team prioritize which improvement projects should be started first by using play \$5 million dollar bills to "pay for" their preferred projects.



Priorities

The list of potential projects in order of the participant's preferences includes:

1. Simpson Street Improvement – 46 votes
2. Gateways into Downtown – 41 votes
3. Park Bridging Interstate – 31 votes
4. Interstate Ramp Improvements – 27 votes
5. Park at Marietta/Alexander – 20 votes
6. Municipal Parking Structures – 16 votes
7. Baker Street Streetscape – 14 votes
8. GWCC Phase V – Entry Park – 12 votes
9. Civic Center Plaza – 3 votes
10. Piedmont Ave. Streetscape Imp. – 3 votes
11. Baker and Harris streets 2-Way – 2 votes

Everyone was excited and optimistic about the positive changes that are soon to occur in their neighborhood. The involvement of this diverse crowd has provided CAP/ADID with wonderful and innovative ideas that will significantly shape the plan for the future of Downtown.



OFFICE AND RETAIL MARKET ANALYSIS

JSA-McGILL STUDY AREA

Submitted to:

Central Atlanta Progress, Inc.

Submitted by:

ZHA, Inc.
Annapolis, Maryland

September 2003



I. INTRODUCTION

A. STUDY PURPOSE

This report evaluates the potential to develop office and retail space in the JSA-McGill Study Area. The conclusions reached herein are a product of market analysis. Supportable square feet are projected between now and 2010. The conclusions are preliminary and intended to provide information to guide the planning process. As a development plan is created the market analyses will be refined to reflect the mix of uses contemplated.

B. SUMMARY OF CONCLUSIONS

1. Office

The JSA-McGill Study Area is well positioned for office development given its (1) location within easy walking distance to the Core of Downtown Atlanta; (2) its proximity to major public attractions such as Centennial Park, the Aquarium and World of Coke; and, (3) a significant supply of developable land. There is nothing inherently wrong with the JSA-McGill Study Area as an office investment location.

The JSA-McGill Study Area's ability to attract office development will largely depend on Downtown's competitiveness as a business location. Recent trends suggest that Downtown is struggling to, or, in fact, losing its competitive position within the metropolitan office market. Therefore, it is unrealistic to assume that office uses will rapidly absorb the available land in the JSA-McGill Study Area between now and 2010.

Instead, the conclusions regarding supportable office square feet are based on an assumption that the JSA-McGill Study Area evolves into a mixed-use sub-district with significant housing and retail/entertainment land uses. As such, office is a contributing land use, but not the dominant land use in the Study Area.

If residential development is feasible, an opportunity exists for the JSA-McGill Study Area to offer a unique Downtown office product. In portions of the Study Area, the product could be moderately priced, new office space in a non-high-rise building. Loft office product would contribute to a neighborhood environment. This type of product would target the Class-B office user, priced out of Midtown and Buckhead.

ZHA concludes that 350,000 to 500,000 square feet of this office product is likely supportable in the JSA-McGill Study Area between now and 2010. This is net of the *Park Tower at Centennial Hill* project. This projection assumes significant residential development in the Study Area in the near future creating market



momentum and a sense that a new neighborhood is coming on-line. This projection coupled with the *Park Tower* project represents seven to nine percent of the Downtown's office development potential through 2010.

The product envisioned is four to eight stories and an average size of 130,000 to 300,000 square feet. Rents would be approximately \$21.00 to \$23.00 per square foot (Class-A-/B+).

2. Retail

Atlantic Station will be a regional mall less than 10 minutes from the JSA-McGill Study Area. Given this pending project and the fact that the Downtown currently commands such a small share of the City's retail potential, ZHA concludes that a regional mall in the Study Area is not market supportable.

Given this conclusion, the JSA-McGill Study Area's retail potential will be driven by proximate markets. These markets are employees, residents, and hotel guests within easy walking distance (one-quarter mile) to the Study Area and visitors to the new Aquarium and World of Coke projects. At this time, the retail program for the World of Coke is unknown. This analysis assumes minimal retail on-site at the Aquarium and World of Coke.

Net of the existing retail supply, proximate employees, hotel guests, residents, and attraction visitors have the potential to spend over \$100 million. It is important to note that a small share of this market is actually new. Therefore, most of these sales occur either elsewhere in the Downtown or outside of the Downtown currently.

To capture a proportion of these sales will require that retail be clustered to create enough critical mass to draw the market to the JSA-McGill Study Area. Eating and drinking sales make up a vast majority of the retail sales potential. Moderately priced, "family" restaurants (*Macaroni Grill*, *TGIFridays*) appear to be lacking in the Downtown. Following the principles of an agglomeration economy, restaurants and clubs thrive in proximity to each other.

The most strategic location for eating and drinking establishments is Simpson Street. This street is between the attractions and many Downtown hotels. This street is convenient to the office core, where the very large employee market resides. The street is narrow making it potentially pedestrian-oriented. This street is also of a scale where a modestly sized development can have a major impact on the street environment.



Additional, stand alone retail will have potential on Alexander Street. Alexander is slated to become a major east-west thoroughfare. Retail will be drawn to the visibility of this location. Convenience retail (food and drug) will likely develop at this location.

ZHA concludes that between 75,000 and 100,000 square feet of retail are likely supportable in the JSA-McGill Study Area through 2010. This projection represents a capture rate between 20 and 25 percent of net sales potential. The remaining potential will be captured outside of the Study Area. The projected JSA-McGill Study Area's supportable retail sales represent 1 percent of the City's net new retail sales potential through 2010.



II. OFFICE MARKET ANALYSIS

A. OFFICE MARKET OVERVIEW

The Atlanta office market consists of ten submarkets in over 15 different counties. The Atlanta Office Market is large from both a geographic and development (over 155 million square feet) perspective.

TABLE II-1

OFFICE SUPPLY
MAJOR METRO MARKETS
2003

	<u>Total Inventory (sf)</u>
New York, NY	682,538,000
Washington, DC	313,855,000
Chicago, IL	269,253,000
Dallas, TX	237,177,000
Houston, TX	195,575,000
Los Angeles, CA	174,619,000
Atlanta, GA	157,028,920
Boston, MA	147,629,000
Denver, CO	125,404,000
Seattle, WA	84,053,000

Source: Colliers International North America Office Real Estate Highlights, 2nd Quarter 2003, Costar, and ZHA, Inc.
office/national

Atlanta's office supply is comparable in size to the office markets in Los Angeles and Boston. Atlanta's office market is smaller than New York, Washington, Chicago, Dallas and Houston and larger than Denver and Seattle.



TABLE II-2
OFFICE SUPPLY TRENDS
METROPOLITAN ATLANTA OFFICE MARKET
1998 TO MID-YEAR 2003

<u>Year</u>	<u>Total Sq. Ft.</u>	<u>Vacancy Rate</u> ^{/1}
1988	96,103,407	21.3%
1989	103,077,832	18.1%
1990	106,248,843	18.2%
1991	110,341,639	18.7%
1992	113,679,528	18.7%
1993	114,142,210	17.0%
1994	114,367,740	14.1%
1995	115,381,340	12.1%
1996	117,105,708	11.4%
1997	123,304,457	11.9%
1998	130,693,560	11.3%
1999	137,259,278	12.4%
2000	145,387,482	11.7%
2001	152,660,908	17.8%
2002	155,446,541	20.7%
2003	157,028,920	21.5%

^{/1} Vacancy rate includes sublet space.

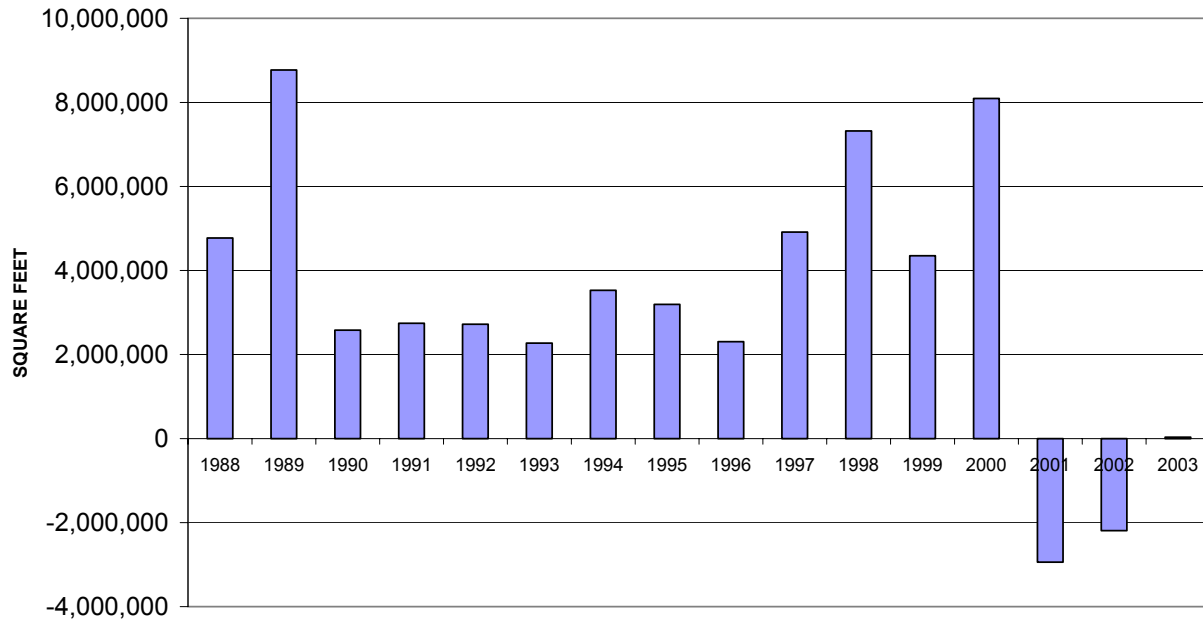
Source: CoStar, Inc.; ZHA, Inc.
office/trend

Atlanta's office supply has increased by over 60 percent over the last 15 years. Most of the increase in office supply occurred between 1996 and 2001 when over 35 million square feet were brought onto the market. Even with this explosive growth in office inventory vacancy rates during these years remained relatively low. As of Midyear 2003, over one-fifth of the office space in the Atlanta market was available.



EXHIBIT II-1

**ABSORPTION TRENDS
METROPOLITAN ATLANTA OFFICE MARKET
1988 - MIDYEAR 2003**



Source: CoStar, Inc.; ZHA
Office/chart 1

As in most metro markets, the Atlanta office market has been impacted by the recent national economic slowdown. Atlanta's office absorption in 2000 and 2001 was negative leading to increased office vacancy and availability.



TABLE II-3

CLASS-A OFFICE SUPPLY TRENDS
METROPOLITAN ATLANTA OFFICE MARKET
1998 TO MID-YEAR 2003

<u>Year</u>	<u>Total Sq. Ft.</u>	<u>Vacancy Rate</u> ^{/1}	<u>Class-A Share of Total Inventory</u>
1988	36,327,735	26.1%	38%
1989	41,783,780	21.4%	41%
1990	44,176,709	19.3%	42%
1991	47,652,255	20.0%	43%
1992	50,665,039	19.7%	45%
1993	51,105,721	17.4%	45%
1994	51,147,121	13.8%	45%
1995	51,510,258	11.2%	45%
1996	52,435,076	10.5%	45%
1997	56,919,739	12.3%	46%
1998	62,147,252	11.1%	48%
1999	65,818,125	11.5%	48%
2000	71,623,839	10.8%	49%
2001	77,156,973	18.5%	51%
2002	79,124,870	23.6%	51%
2003	80,608,249	24.6%	51%

^{/1} Vacancy rate includes sublet space.

Source: CoStar, Inc.; ZHA, Inc.
office/class a trend

As of Midyear 2003, Class-A office represented over one-half of the Metropolitan Area's office supply. As is expected from growing economies, the share of Class-A space in Atlanta has grown over time. Atlanta's Class-A office supply has more than doubled in size since 1988. However, today, one quarter of the Metropolitan Area's Class-A space is available for lease or sub-lease.



TABLE II-4

CLASS-A OFFICE ABSORPTION TRENDS
METROPOLITAN ATLANTA OFFICE MARKET
1998 TO MID-YEAR 2003

<u>Year</u>	<u>Total Sq. Ft.</u>
1988	3,631,710
1989	6,009,059
1990	2,800,042
1991	2,464,469
1992	2,590,938
1993	1,499,585
1994	1,905,508
1995	1,627,469
1996	1,165,248
1997	3,031,340
1998	5,300,245
1999	2,989,723
2000	5,652,379
2001	(986,062)
2002	(2,409,810)
2003	279,862

Source: CoStar, Inc.; ZHA, Inc.
office/A absorp

Class-A supply absorbed at an average annual rate of 4.2 million square feet per year between 1996 and 2000. In 2000 and 2001 there was a net loss of occupied Class-A space in the Atlanta market. To date in 2003, Atlanta is experiencing positive Class A office absorption.



TABLE II-5

OFFICE-INCLINED EMPLOYMENT VS OFFICE INVENTORY GROWTH
US CITIES
1998 TO 2003

City	Office-Inclined Employment Growth ^{/1}	Office Inventory Growth	Difference
Atlanta	14.2%	26.3%	-12.1%
Boston	8.0%	12.0%	-4.0%
Chicago	5.0%	9.3%	-4.3%
Dallas/Ft Worth	12.7%	18.7%	-6.0%
Denver	7.4%	23.2%	-15.8%
Los Angeles	6.7%	4.7%	2.0%
New York City	7.0%	1.7%	5.3%
Seattle/Puget Sound	9.6%	20.6%	-11.0%
South Florida	13.5%	12.3%	1.2%
Washington	15.7%	0.0%	15.7%

^{/1} Office-inclined employment growth is defined as jobs in the finance, insurance, real estate and service industries.

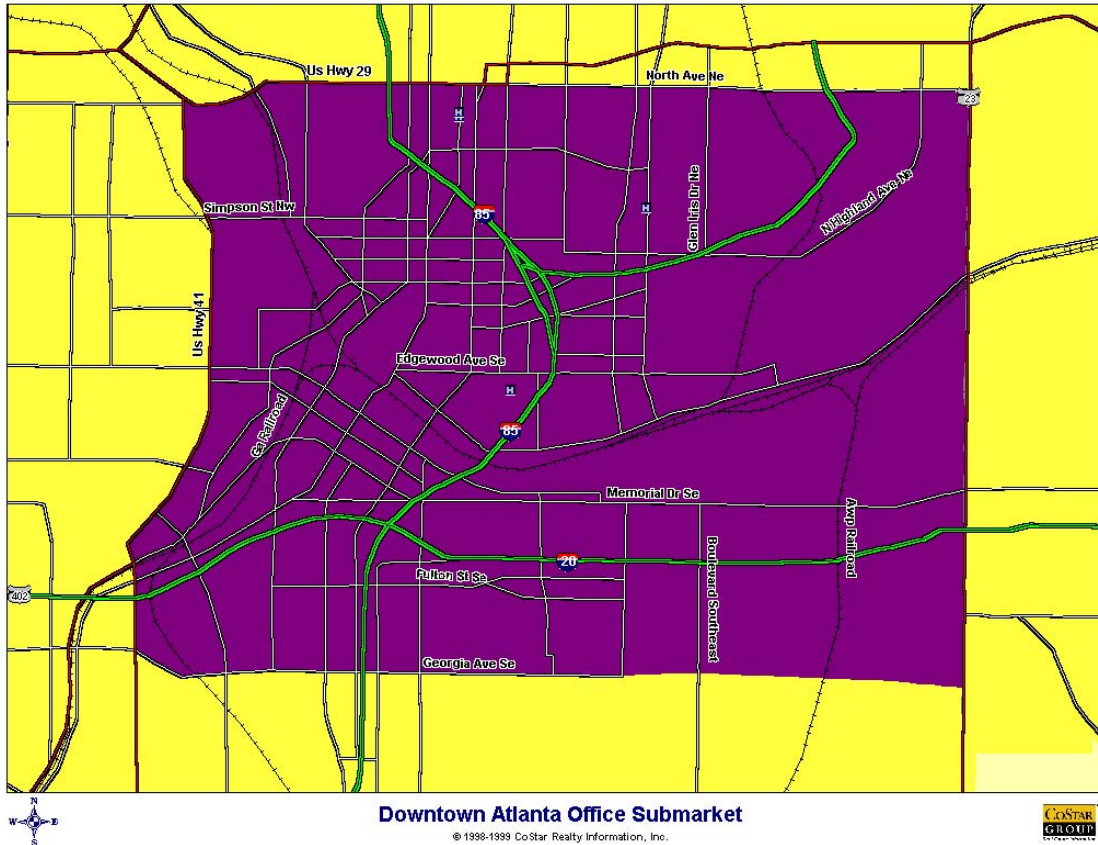
Source: Department of Labor, Bureau of Labor Statistics; CoStar, Inc.; ZHA, Inc.
office/comp cities

It is interesting to note, that as compared to many other large metro markets, Atlanta's office development over the last five years far outpaced its employment growth during the same period.



EXHIBIT II-2

GEOGRAPHIC BOUNDARIES "DOWNTOWN" OFFICE SUBMARKET
MIDYEAR 2003



As defined by CoStar, there are ten submarkets within the Atlanta office market. Downtown is one of these submarkets. The "Downtown Submarket" boundaries are illustrated above.



TABLE II-6

OFFICE INVENTORY
ATLANTA SUBMARKETS
MIDYEAR 2003

<u>Office Submarket</u>	<u>Sq. Ft.</u>	<u>Share of Total</u>	<u>Vacancy</u>
Northwest Atlanta	27,149,040	17.3%	20.6%
Central Perimeter	26,861,867	17.1%	26.2%
Downtown	20,054,800	12.8%	13.6%
North Fulton	19,363,003	12.3%	27.7%
Midtown	14,818,897	9.4%	24.2%
Northeast Atlanta	14,597,260	9.3%	22.8%
Northlake	14,451,632	9.2%	13.8%
Buckhead	13,844,400	8.8%	21.4%
South Atlanta	4,607,534	2.9%	17.1%
West Atlanta	1,280,487	0.8%	27.3%
Total	<u>157,028,920</u>	<u>100.0%</u>	<u>21.5%</u>

Source: CoStar, Inc.; ZHA, Inc.
office/downtown

Downtown Atlanta's office supply represents less than 14 percent of the metro Atlanta office supply. Downtown has the lowest office vacancy rate among the ten office submarkets.



TABLE II-7

DOWNTOWN OFFICE SHARE OF METRO SUPPLY
MAJOR METRO MARKETS
2003

	<u>Metro Inventory (sf)</u>	<u>% Downtown</u>
New York, NY	682,538,000	63.4%
Chicago, IL	269,253,000	46.4%
Seattle, WA	84,053,000	42.1%
Boston, MA	147,629,000	37.9%
Washington, DC	313,855,000	32.9%
Denver, CO	125,404,000	22.7%
Houston, TX	195,575,000	21.5%
Los Angeles, CA	174,619,000	19.1%
Dallas, TX	237,177,000	15.8%
Atlanta, GA	157,028,920	12.8%

Source: Colliers International North America Office Real Estate Highlights, 2nd Quarter 2003, Costar, and ZHA, Inc.
office/natl downtown

According to Colliers International data, as compared to other major cities, Downtown Atlanta has the smallest share of its metro office supply in Downtown. Older cities like New York, Chicago and Boston have a significantly higher share of their office supply in the Downtown. Downtowns in newer cities like Dallas, Houston, and Denver have a smaller share of their office development in the Downtown.



TABLE II-8

DOWNTOWN VACANCY RATE
MAJOR METRO MARKETS
2003

	<u>Vacancy Rate</u>
Dallas, TX	25.2%
Los Angeles, CA	21.3%
Houston, TX	19.8%
Boston, MA	18.4%
Chicago, IL	17.8%
Denver, CO	17.3%
Seattle, WA	15.7%
Atlanta, GA	13.6%
New York, NY	13.0%
Washington, DC	6.2%

Source: Colliers International North America Office
Real Estate Highlights, 2nd Quarter 2003, Costar,
and ZHA, Inc.
office/NATL DT VAC

As compared to many of the large metro markets analyzed, Atlanta's Downtown has a relatively low vacancy rate.



TABLE II-9

OFFICE INVENTORY
ATLANTA SUBMARKETS
MIDYEAR 2003

<u>Office Submarket</u>	<u>Total Sq. Ft.</u>	<u>Class A Sq. Ft.</u>	<u>Class A Share</u>
Northwest Atlanta	27,149,040	13,200,291	48.6%
Central Perimeter	26,861,867	16,763,200	62.4%
Downtown	20,054,800	13,122,165	65.4%
North Fulton	19,363,003	11,541,093	59.6%
Midtown	14,818,897	8,343,278	56.3%
Northeast Atlanta	14,597,260	5,449,784	37.3%
Northlake	14,451,632	1,821,199	12.6%
Buckhead	13,844,400	9,732,246	70.3%
South Atlanta	4,607,534	634,993	13.8%
West Atlanta	1,280,487	-	0.0%
Total	<u>157,028,920</u>	<u>80,608,249</u>	<u>51.3%</u>

Source: CoStar, Inc.; ZHA, Inc.
office/class a share

Approximately two-thirds of Downtown Atlanta's office space is Class-A. The only submarket with a higher ratio of Class-A space to total office space is Buckhead where 70 percent of the office supply is Class-A.

TABLE II-10

CLASS-A OFFICE INVENTORY
ATLANTA SUBMARKETS
MIDYEAR 2003

<u>Office Submarket</u>	<u>Sq. Ft.</u>	<u>Share of Total</u>
Central Perimeter	16,763,200	20.8%
Northwest Atlanta	13,200,291	16.4%
Downtown	13,122,165	16.3%
North Fulton	11,541,093	14.3%
Buckhead	9,732,246	12.1%
Midtown	8,343,278	10.4%
Northeast Atlanta	5,449,784	6.8%
Northlake	1,821,199	2.3%
South Atlanta	634,993	0.8%
Total	<u>80,608,249</u>	<u>100.0%</u>

Source: CoStar, Inc.; ZHA, Inc.
office/A downtown



The Central Perimeter submarket (which is immediately north of Midtown on the Interstate) contains the greatest supply of Class-A office space in the Atlanta market. Approximately one-fifth of all Atlanta's Class A office space is located in this submarket. Downtown's share of Atlanta's Class-A office market is high at 16 percent.

TABLE II-11

CLASS-A OFFICE VACANCY
ATLANTA SUBMARKETS
MIDYEAR 2003

<u>Office Submarket</u>	<u>Vacancy</u>
Central Perimeter	31.0%
Northwest Atlanta	21.7%
Downtown	14.8%
North Fulton	29.1%
Buckhead	24.6%
Midtown	27.0%
Northeast Atlanta	23.5%
Northlake	24.8%
South Atlanta	<u>17.9%</u>
Total	<u>24.6%</u>

Source: CoStar, Inc.; ZHA, Inc.
office/A vacancy

The vacancy rate among all Class A buildings is approximately 25 percent. Class A space in Downtown is 15 percent vacant. Downtown's Class-A vacancy rate is well below all other Atlanta submarkets.



EXHIBIT II-3

**QUOTED CLASS-A RENTAL RATES
ATLANTA SUBMARKETS
MIDYEAR 2003**



Source: CoStar, Inc; ZHA
Office/a rent

Quoted Class-A office rents are \$21.04 per year per square foot in Downtown Atlanta. This rate is comparable to average Class-A rents in the Atlanta metro market. Class-A rents are highest in Buckhead and Midtown (\$23.50 to \$24.00 per square foot).



TABLE II-12

DOWNTOWN CLASS-A RENTS (NNN)
MAJOR METRO MARKETS
2003

	<u>Net Class A Rent</u>
New York, NY	\$19.60-\$35.55
Washington, DC	\$33.15
Boston, MA	\$23.40
Chicago, IL	\$19.00
Seattle, WA	\$17.40
Atlanta, GA	\$12.65
Houston, TX	\$12.60
Denver, CO	\$12.60
Los Angeles, CA	\$10.25
Dallas, TX	\$10.00

Source: Colliers International North America Office
Real Estate Highlights, 2nd Quarter 2003, Costar, and
ZHA, Inc.
office/national rent

Atlanta's Class-A *net* rental rates are well below rates in New York, Washington, DC and Boston. Atlanta's Class-A rental rates are comparable to rates in Houston and Denver.

B. OFFICE DEMAND

For purposes of this analysis, office-inclined employment is defined as jobs in the finance, insurance, real estate, business services, legal services, social service, membership organization and engineering and management service industries. As demonstrated below, Fulton County employment in these industries closely approximates the supply of office in the County.



TABLE II-13

OFFICE INCLINED EMPLOYMENT VS OFFICE SUPPLY
 FULTON COUNTY
2003

Office-Inclined Employment 2003	266,439
Employee /SF	250
Supportable SF	66,609,821
Office Supply SF	68,081,100
Calculated Office vs Office Supply	98%

Note: 2003 employment extrapolated from 2000 - 2010 projections.

Source: Atlanta Regional Commission; ZHA
 office/2003 emp

There is a high correlation between County office-inclined employment and the County's actual office supply.

TABLE II-14

PROJECTED OFFICE-INCLINED EMPLOYMENT AND OFFICE DEMAND
 FULTON COUNTY
2003 TO 2010

	<u>2003</u>	<u>2010</u>	<u>Difference</u>
Office-Inclined Employment	266,439	331,128	64,689
Employee /SF	250	250	250
Net New Office Demand (Square Feet)	66,609,821	82,782,064	16,172,243

Note: 2003 employment extrapolated from 2000 - 2010 projections.

Source: Atlanta Regional Commission; ZHA
 office/proj

Over the next seven years, office-inclined jobs in Fulton County are projected to increase by approximately 64,690. Translating this into office demand results in the demand for 16 million square feet of office space in the County. New demand typically targets Class-A and -B space.



TABLE II-15

CLASS-A AND -B SPACE VACANCY
FULTON COUNTY SUB-MARKETS
MIDYEAR 2003

<u>Fulton County Submarket</u>	<u>Class-A & -B Office Supply SF</u>	<u>Vacant SF</u>	<u>Vacancy Rate</u>
Downtown	17,990,364	2,514,255	14.0%
Midtown	14,081,256	3,382,749	24.0%
Buckhead	13,207,750	2,899,619	22.0%
North Fulton	19,035,229	5,318,524	27.9%
Total County	64,314,599	14,115,147	21.9%

Source: CoStar, Inc.; ZHA, Inc.
office/class a b

There is currently surplus Class-A and -B office supply in Fulton County. Downtown is experiencing the lowest vacancy among the County's submarkets.

TABLE II-16

SURPLUS OFFICE SUPPLY
FULTON COUNTY
2003

		<u>Square Feet</u>
Class-A & -B Space		64,314,599
Current Vacant Space	22%	14,115,147
Equilibrium Vacant	12%	<u>7,717,752</u>
Supply to be Absorbed 2003 - 2010		6,397,395

Source: Atlanta Regional Commission; ZHA
office/surplus supply

Assuming office market equilibrium is 12 percent vacancy, 40 percent of the net new office demand will likely be absorbed in existing office space. Most of this absorption will occur outside of the Downtown where vacancy is highest.



TABLE II-17

OFFICE BUILDINGS UNDER CONSTRUCTION
 FULTON COUNTY
MIDYEAR 2003

	<u>Class</u>	<u>Leaseable SF</u>	<u>Available SF</u>
Downtown		0	0
Midtown			
171 17th St NE	A	500,000	360,856
Atlantic Station - Town Cntr Bldg 10	A	128,000	106,000
Atlantic Station - Town Cntr Bldg 11	A	128,000	111,000
Centargy @ Tech Square	A	488,000	321,200
Sub-Total		<u>1,244,000</u>	<u>899,056</u>
Buckhead		0	0
North Fulton ^{/1}			
Central Plaza	B	<u>15,000</u>	<u>11,000</u>
Total County		<u>1,259,000</u>	<u>910,056</u>

^{/1} There is another building under construction in North Fulton, but it is medical.

Source: CoStar, Inc.; ZHA, Inc.
 office/under construction

Net new office demand will also be absorbed by projects currently under construction in Fulton County. No office projects are currently under construction in the Downtown (the submarket with the lowest vacancy rate). Office buildings are currently being developed in Midtown and North Fulton County. In terms of available leaseable space, these projects amount to almost one million square feet.



TABLE II-18

NET NEW OFFICE POTENTIAL
FULTON COUNTY
2003 TO 2010
(Square Feet)

Projected Class-A and -B Office Demand				16,172,243
	<u>Surplus Space</u>		<u>Space Under Construction</u>	
Downtown	(355,411)	+	-	= (355,411)
Midtown	(1,692,998)	+	(899,056)	= (2,592,054)
Buckhead	(1,314,689)	+	-	= (1,314,689)
North Fulton	(3,034,297)	+	(11,000)	= (3,045,297)
Net New Class-A & -B Office Potential				<u>8,864,792</u>

Source: CoStar, Inc.; ZHA, Inc.
office/net new

Surplus office supply and projects currently under construction will absorb over one-half of the County's office demand between now and 2010. Taking into consideration surplus supply and projects currently under construction, employment growth in Fulton County results in a demand for 8.86 million square feet of net new office space.

While it is unknown where new jobs will be located, it is apparent in the table above that the Downtown submarket is the "tightest" from a supply standpoint.

TABLE II-19

PLANNED CLASS-A AND -B OFFICE SPACE
FULTON COUNTY SUB-MARKETS
MIDYEAR 2003

<u>Fulton County Submarket</u>	<u>Planned SF</u>	<u>Available SF</u>
Downtown	782,549	500,000
Midtown	3,480,361	3,480,361
Buckhead	4,002,262	4,002,262
North Fulton	4,229,802	4,023,552
Total County	<u>12,494,974</u>	<u>12,006,175</u>

Source: CoStar, Inc.; ZHA, Inc.
office/planned



There are a number of office projects planned in Fulton County. It is unknown how many of these projects will actually be developed and when. Atlantic Station at build-out is programmed to contain six million square feet of office space. It is important to note, however, that the Downtown has significantly fewer projects planned than other Fulton County submarkets.

TABLE II-20

SUPPORTABLE OFFICE SQUARE FEET
DOWNTOWN ATLANTA
2003 TO 2010

Net New Supportable Square Feet	8,865,000	8,865,000
Downtown Capture	8%	20%
Downtown Capture	709,000	1,773,000

Source: ZHA, Inc.
office/dt conc

Downtown Class-A and -B space currently accounts for 29 percent of the office space in Fulton County. Among the Fulton County submarkets, Downtown is currently the most supply constrained given comparatively high occupancy, no space in the "pipeline" and relatively little planned space.

The Downtown continues to be a premiere location in the Metro market. ZHA does not think it is unrealistic to assume that the Downtown can absorb 8 to 20 percent of the net new demand for office in Fulton County. The wide spread in capture reflects the importance of large anchor tenants to office development feasibility.

C. JSA-MCGILL STUDY AREA AND MARKET POSITIONING AND SUPPORTABLE OFFICE SQUARE FEET

The JSA-McGill Study Area is well positioned for office development given its (1) location within easy walking distance to the Core of Downtown Atlanta; (2) its proximity to major public attractions such as Centennial Park, the Aquarium and World of Coke; and, (3) a significant supply of developable land. There is nothing inherently wrong with the JSA-McGill Study Area as an office investment location.



The JSA-McGill Study Area's ability to attract office development will largely depend on Downtown's competitiveness as a business location. Recent trends suggest that Downtown is struggling to, or, in fact, losing its competitive position within the metropolitan office market. Therefore, it is unrealistic to assume that office uses will rapidly absorb the available land in the JSA-McGill Study Area between now and 2010.

Instead, the conclusions regarding supportable office square feet are based on an assumption that the JSA-McGill Study Area evolves into a mixed-use sub-district with significant housing and retail/entertainment land uses. As such, office is a contributing land use, but not the dominant land use in the Study Area.

If residential development is feasible, an opportunity exists for the JSA-McGill Study Area to offer a unique Downtown office product. In portions of the Study Area, the product could be moderately priced, new office space in a non-high-rise building. Loft office product would contribute to a neighborhood environment. This type of product would target the Class-B office user, priced out of Midtown and Buckhead.

ZHA concludes that 632,000 to 783,000 square feet of this office product is likely supportable in the JSA-McGill Study Area between now and 2010. This projection assumes significant residential development in the Study Area in the near future creating market momentum and a sense that a new neighborhood is coming on-line. This projection represents seven to nine percent of Fulton County's office development potential through 2010.

The product envisioned is four to eight stories, 130,000 to 300,000 square feet. Rents would be approximately \$21.00 to \$23.00 per square foot (Class-A-/B+).



III. RETAIL

A. OVERVIEW

Three retail markets are evaluated in this overview, the Metropolitan Atlanta retail market, the City retail market, and the Downtown retail market. The analysis refers to "retail sales" which includes motor vehicle sales and service as well as catalogue sales. The analysis also refer to "shopping center-inclined retail sales" which refers only to sales of general merchandise, apparel, furniture/home accessories, and other (music, books, gifts, etc.) products as well as convenience goods (food and pharmacy) and home improvement products. "Shopping center-inclined sales" generally reflect shopper's goods sales.

As of 2002, the Atlanta Metropolitan Area ranked 8th in population among all United States metro areas.

TABLE III-1

RETAIL SALES
MAJOR METROPOLITAN AREAS
2002

<u>Rank</u>	<u>Metropolitan Area</u>	<u>Retail Sales (000's)</u>
1	Los Angeles, CA	\$111,864,575
2	Chicago, IL	\$105,777,233
3	New York, NY	\$90,000,263
4	Philadelphia, PA	\$65,090,000
5	Atlanta, GA	\$64,666,448
6	Washington, DC	\$63,906,171
7	Detroit	\$63,483,990
8	Boston, MA	\$60,831,894
9	Houston, TX	\$57,405,015
10	Dallas, TX	\$54,158,907

Source: Sales, Marketing & Management; ZHA
retail/metro sales

Atlanta ranked 5th among US metro areas in terms of retail sales.



TABLE III-2

RETAIL SALES PER PERSON
MAJOR METROPOLITAN MARKET
2002

<u>Metropolitan Area</u>	<u>Sales</u>	<u>\$/Person</u>
Seattle, WA	\$41,727,842,000	\$17,078
Denver, CO	\$33,750,880,000	\$15,729
Atlanta, GA	\$64,666,448,000	\$15,402
Boston, MA	\$60,831,894,000	\$15,139
Dallas, TX	\$54,158,907,000	\$15,118
Houston, TX	\$57,405,015,000	\$13,533
Washington, DC	\$63,906,171,000	\$12,844
Chicago, IL	\$105,777,233,000	\$12,687
Los Angeles, CA	\$111,864,575,000	\$11,691
New York, NY	\$90,000,263,000	\$9,603

Source: Sales, Marketing & Management; ZHA
retail/metro sales PERSON

As is evident in the table above, Atlanta like Seattle and Denver benefit from being independent centers: they experience high retail sales per metro resident. With little else around them, these types of metro areas do not experience as much retail sales leakage as metropolitan areas in larger consolidated metropolitan regions like Washington, DC and New York.



TABLE III-3

SHOPPING CENTER SPACE
MAJOR METROPOLITAN MARKET
2002

	Shopping Center Sq. Ft. /Person	Shpg Cntr Share of Metro Sales ^{/1}
Atlanta, GA	27.8	54%
Denver, CO	26.7	52%
Washington, DC	22.5	53%
Dallas, TX	22.5	45%
Boston, MA	22.3	45%
Houston, TX	20.7	46%
Chicago, IL	18.2	42%
Seattle, WA	15.4	27%
Los Angeles, CA	12.8	33%
New York, NY	4.9	16%

^{/1} Assumed average sales of \$300 per square foot.

Source: National Research Bureau; Sales, Marketing & Management; ZHA
retail/shpg cntr

The Atlanta Metro Area has more shopping center space per capita than all of the major metro areas evaluated. Assuming average sales of \$300 per square foot, shopping centers capture over half of the Atlanta market's retail sales. Shopping centers often indicate economic decentralization.



TABLE III-4

CITY RETAIL SALES AS A PERCENTAGE OF METRO RETAIL SALES
MAJOR METROPOLITAN MARKETS
2002

<u>Metropolitan Area</u>	<u>Metro Sales</u>	<u>City Sales</u>	<u>Sales City to Metro</u>
Houston, TX	\$57,405,015	\$32,016,318	55.8%
New York, NY	\$90,000,263	\$36,458,929	40.5%
Dallas, TX	\$54,158,907	\$19,733,527	36.4%
Los Angeles, CA	\$111,864,575	\$40,552,103	36.3%
Seattle, WA	\$41,727,842	\$11,489,924	27.5%
Denver, CO	\$33,750,880	\$9,202,677	27.3%
Chicago, IL	\$105,777,233	\$23,919,129	22.6%
Boston, MA	\$60,831,894	\$7,888,351	13.0%
Atlanta, GA	\$64,666,448	\$6,724,147	10.4%
Washington, DC	\$63,906,171	\$3,993,986	6.2%

Source: Sales, Marketing & Management; ZHA
retail/city metro

As compared to other major metropolitan areas, the City of Atlanta captures a small share (10 percent) of metropolitan area retail sales. By comparison, the City of Houston captures over half of its metropolitan area's retail sales.

TABLE III-5

CITY SHARE METRO RETAIL SALES VS POPULATION
MAJOR METROPOLITAN MARKETS
2002

<u>City</u>	<u>Sales City to Metro</u>	<u>Population City to Metro</u>
Houston, TX	55.8%	47.0%
New York, NY	40.5%	16.4%
Dallas, TX	36.4%	32.8%
Los Angeles, CA	36.3%	39.1%
Seattle, WA	27.5%	23.4%
Denver, CO	27.3%	26.1%
Chicago, IL	22.6%	35.4%
Boston, MA	13.0%	14.7%
Atlanta, GA	10.4%	10.3%
Washington, DC	6.2%	11.4%

Source: Sales, Marketing & Management; ZHA
retail/POPcity metro



The City of Atlanta's weak metro sales penetration is partially due to a relatively small City population. The City of Atlanta's share of metro retail sales is consistent with its share of metro population. Atlanta's "balance" can be compared to New York where City sales far surpass the City's share of population. New York City experiences an "inflow" of retail sales from metro residents, visitors and employees.

TABLE III-6

RETAIL SALES PER PERSON
MAJOR US CITIES
2002

<u>City</u>	<u>Sales (000's)</u>	<u>\$/City Resident</u>
New York, NY	\$36,458,929	\$23,661
Seattle, WA	\$11,489,924	\$20,122
Dallas, TX	\$19,733,527	\$16,800
Houston, TX	\$32,016,318	\$16,059
Denver, CO	\$9,202,677	\$16,401
Atlanta, GA	\$6,724,147	\$15,483
Boston, MA	\$7,888,351	\$13,347
Los Angeles, CA	\$40,552,103	\$10,841
Chicago, IL	\$23,919,129	\$8,110
Washington, DC	\$3,993,986	\$7,014

Source: Sales, Marketing & Management; ZHA
retail/city sales PERSON

The City of Atlanta's retail sales per City resident are similar to Atlanta's metro sales per Atlanta Metro resident. The average City retail sales per resident in Atlanta are similar to the average in Houston, TX and Denver, CO. Once again, New York City's high average per City resident demonstrates that it is successfully capturing sales from other markets.



TABLE III-7

RENTAL RATES
PREMIERE DOWNTOWN SHOPPING STREETS
MAJOR US CITIES

<u>City</u>	<u>Location</u>	<u>Rental Rate</u>
New York, NY	Fifth Ave	\$775
Chicago, IL	Michigan Ave	\$200
Los Angeles, CA	Rodeo Drive	\$170
Boston, MA	Newbury	\$145
Houston, TX	Westheimer	\$93
Seattle, WA	6th Ave	\$58
Atlanta, GA	Peachtree	\$30
Denver, CO	Cherry Creek North	\$30
Washington, DC	M Street	\$30
Dallas, TX	Oak Lawn/Fitzhugh	\$28

Source:
retail/rent

Data on Downtown retail sales are not available. However, an evaluation of rental rates does offer insight into the drawing power of a Downtown. As the table above demonstrates, Atlanta's premiere Downtown location commands one of the lowest retail rents among the metro areas evaluated.

In sum, the data indicate that the City of Atlanta and Atlanta's Metro Area are keeping pace with other Metro Areas in terms of retail sales and sales per resident. However, rental rates indicate that *Downtown* Atlanta does not possess the same retail prowess as other major metro area Downtowns.



B. ATLANTA RETAIL MARKET

TABLE III-8

RETAIL SALES INFLOW/OUTFLOW
METRO ATLANTA
2002

Residents	4,327,437
Per Capita Income	<u>\$29,037</u>
Total Buying Income (000's)	\$125,655,788
Retail Sales Potential (000's)	\$67,854,126
Actual Retail Sales (000's)	\$64,666,448
Potential to Sales	105%

Source: Sales, Marketing & Management, 2001; ZHA
retail/metro

As might be expected from a regional center, Atlanta Metro Area retail sales are in equilibrium with the resident market's retail buying potential. There is only a five percent difference between Metro Atlanta's retail sales potential and actual sales.

TABLE III-9

RETAIL SALES INFLOW/OUTFLOW
CITY OF ATLANTA
2002

Residents	423,395
Per Capita Income	<u>\$29,383</u>
Total Buying Income (000's)	\$12,440,615
Retail Sales Potential (000's)	\$6,717,932
Actual Retail Sales	\$6,907,135
Potential to Sales	97%

Source: Sales, Marketing & Management, 2001; ZHA
retail/city



The same is true of the City, where the resident's retail buying power closely approximates actual retail sales.

TABLE III-10

ESTIMATED RETAIL SALES BY CITY SUBMARKET
CITY OF ATLANTA
2003

<u>Sub-Market</u>	<u>Retail Square Feet</u>	<u>Available Space</u>	<u>Sales @ \$300</u>	<u>% of City Total</u>
Downtown	1,012,884	131,592	\$264,387,600	3.8%
Midtown	1,781,620	185,183	\$478,931,100	6.9%
Buckhead	7,498,594	520,459	\$2,093,440,500	30.3%

Source: DOREY's Atlanta, "Retail Space Guide: Spring/Summer 2003"; ZHA retail/dorey submarket

Applying an average of \$300 in retail sales per square foot, it is apparent that the Downtown is not contributing significantly to the City's retail sales volume. Using inventory collected by Dorey's Atlanta and applying the sales average, Downtown represents less than 5 percent of the City's retail sales. Buckhead is a major retail destination.

TABLE III-11

ESTIMATED RETAIL SALES BY CITY SUBMARKET
CITY OF ATLANTA
2003

<u>Sub-Market</u>	<u>Retail Square Feet</u>	<u>Available Space</u>	<u>Sales @ \$300</u>	<u>% of City Total</u>
<i>Downtown</i>	<i>1,600,000</i>	<i>480,000</i>	<i>\$336,000,000</i>	<i>4.9%</i>
Midtown	1,781,620	185,183	\$478,931,100	6.9%
Buckhead	7,498,594	520,459	\$2,093,440,500	30.3%

Source: Bullock Mannelly Partners, Inc (from Central Atlanta Progress Web Site); Dorey's Atlanta; ZHA retail/bmp submarket

Another source, Bullock Mannelly Partners, Inc., concludes that there are 1.6 million square feet of retail in Downtown Atlanta. This same source states that 30 percent of this space is available for rent. Using this source, Downtown Atlanta still captures less than 5 percent of the City's retail sales.



Downtown Atlanta's capture of City sales is low at four to five percent. ZHA estimates that Downtown Boston captures 23 percent of City retail sales. In Denver, (a newer, more suburban city), ZHA estimates that Downtown captures 12 percent of City sales.

TABLE III-12

DOWNTOWN RESIDENT AND EMPLOYEE SALES POTENTIAL
SHOPPING CENTER-INCLINED RETAIL ^{/1}
DOWNTOWN ATLANTA
2002

Residents		21,302
Per Capita Income		\$13,779
Shopping Center-Inclined Retail Sales Potential		\$93,047,121
 Employees		 136,776
Average Retail Expenditure /Year		\$1,250
Shopping Center-Inclined Sales Potential		\$170,970,000
 Overnight Visitors		
Rooms		10,400
Nights @ 62% Occupancy		2,353,520
Overnight Visitors @ 1.2 Visitors /Room		2,824,224
Average Expenditure		\$279
Retail and Eating & Drinking Sales Potential @ 25%		\$69.75
Shopping Center-Inclined Sales Potential		\$196,989,624
 Day Trip Visitors		 na
 TOTAL SHOPPING CENTER-INCLINED RETAIL SALES POTENTIAL		 \$461,006,745

1. Retail net of automotive-related and catalogue sales.

Source: Claritas, Inc.; International Council of Shopping Centers; Central Atlanta Progress; Travel Industry Association of America; Atlanta Convention and Visitors Bureau; ZHA retail/downtown potential

By evaluating the captive Downtown markets alone reveals that there is significantly more Downtown retail sales potential than being realized today. While day trip visitors are not included in the analysis of the retail sales potential, Downtown does receive day visitors (within 50 miles of Downtown) who are not counted in visitor number totals. Expenditures from these visitors, then, would also contribute to the overall Downtown market.



TABLE III-13

DOWNTOWN CAPTURE OF BASE SALES POTENTIAL
SHOPPING CENTER-INCLINED SALES (NON-AUTO)
ATLANTA
2002

Estimated Actual Sales	\$336,000,000
Potential Sales	\$461,007,000
Retail Sales Capture	73%

Source: ZHA
retail/capture

ZHA estimates that Downtown is capturing 73 percent of the retail potential generated by Downtown residents and employees and overnight visitors. This estimate excludes retail spending potential from non-Downtown residents, visitors staying overnight in hotels outside of the Downtown, and day trippers. If the Downtown were to capture all of \$461 million in captive market retail potential, the Downtown would capture 7 percent of the City's sales.

C. RETAIL SALES POTENTIAL 2010

The City's population is projected to grow by an average annual rate of 0.6 per year through 2007. In addition, real income will grow over time. Extrapolating the average annual growth rate to 2010 will result in approximately \$1.3 billion of new retail demand.



TABLE III-14

PROJECTED RETAIL POTENTIAL
CITY OF ATLANTA
2002 TO 2010

	<u>2002</u>	<u>2010</u>	<u>Change</u>
Population	423,395	442,614	19,219
Per Capita Income /1	<u>\$29,383</u>	<u>\$37,164</u>	<u>\$7,781</u>
Total Income (000's)	<u>\$12,440,615</u>	<u>\$16,449,387</u>	<u>\$4,008,772</u>
Retail Sales Potential (000's)	\$6,718,000	\$8,883,000	\$2,165,000
Shopping Center-Inclined Retail Potential (000's)	\$3,944,000	\$5,215,000	\$1,271,000

Note: Extrapolated real income growth by using 1989 to 1999 growth in per capita income discounted by inflation (2.2%).

Source: Claritas, Inc.; ZHA
retail/proj

Projected retail sales potential translates into the potential for approximately 4.2 square feet of retail space (assuming \$300 in sales per square foot) in the City. A significant share of this potential will likely be absorbed by the Atlantic Station project currently under-construction in Midtown.

Atlantic Station is slated to contain 1.2 to 1.6 million square feet of retail space. According to an Atlantic Station representative, the project expects 900,000 to 1,000,000 square feet of retail to be brought on-line by the spring of 2005. The project is under-construction and at completion will capture approximately one-third of the City's net new retail sales potential through 2010.



D. JSA-MCGILL STUDY AREA

Atlantic Station will be a regional mall less than 10 minutes from the JSA-McGill Study Area. Given this pending project and the fact that the Downtown currently commands such a small share of the City's retail potential, ZHA concludes that a regional mall in the Study Area is not market supportable in the Study Area.

Given this conclusion, the JSA-McGill Study Area's retail potential will be driven by proximate markets. These markets are employees, residents, and hotel guests within easy walking distance (one-quarter mile) to the Study Area and visitors to the new Aquarium and World of Coke projects. At this time, the retail program for the World of Coke is unknown. This analysis assumes minimal retail on-site at the Aquarium and World of Coke.



TABLE III-15

RETAIL SALES POTENTIAL OF MARKETS WITHIN WALKING DISTANCE
 JSA-MCGILL STUDY AREA
2003

Employees	40,620	
Avg. Expenditure /Year	\$1,250	
Retail Sales Potential		\$50,775,335
Hotel Guests		
Number of Rooms	7,225	
Est. Occupied Rms @ 62%	4,480	
Est. Room Nights @ 62% Occupancy	1,013,710	
Est. Visitors @ 1.2 /Room	1,216,450	
Est. Expenditure Per Day	\$69.75	
Retail Sales Potential		\$84,847,388
Residents		
Existing and Potential Residents	3,853	
Est. Per Capita Income (2010)	37,164	
Retail Sales Potential		\$45,392,954
TOTAL RETAIL SALES POTENTIAL PROXIMATE MARKETS		\$181,015,676

Source: Claritas, Inc.; International Council of Shopping Centers; Central Atlanta Progress; Travel Industry Association of America; Atlanta Convention and Visitors Bureau; ZHA
 retail/jsa-mcgill

ZHA estimates that employees, residents and hotel guests within a quarter mile radius of the intersection of Spring Street and Simpson Street represent \$181 million in retail sales potential. The resident market includes the 1,500 households projected by the Zimmerman/Volk market analysis. These markets have the potential to spend in the Study Area, in the remainder of Downtown and elsewhere in the City and Metropolitan market.

In addition to these markets are the visitors to the Aquarium, World of Coke and Centennial Park. Visitation estimates for these attractions are detailed in the table below. It is likely that many of the same visitors will go to each of the three attractions. It is also likely that a significant share of the Aquarium visitors will be either City or Metropolitan Area residents.



TABLE III-16

ESTIMATED ATTRACTION VISITOR RETAIL SPENDING
JSA-MCGILL STUDY AREA

<u>Attraction</u>	<u>Projected Attendance</u>
Centennial Park ^{/1}	2,000,000
World of Coke ^{/2}	750,000
Aquarium	1,500,000
Say	<u>1,500,000</u>
Retail Expenditure Potential @ \$3.00	<u>\$4,500,000</u>

^{/1} 2002 attendance figures.

^{/2} Current attendance at existing World of Coke. No projections available.

Source: ZHA, Inc.
retail/aquarium

In an effort to be conservative only 1.5 million visitors are used to calculate spending. No spending data is available from the Aquarium. Once again, in an effort to be conservative, ZHA has assumed that an average retail expenditure per visitor is \$3.00. These attractions are, therefore, projected to generate \$4.5 million in retail sales potential.

TABLE III-17

RETAIL SALES POTENTIAL
JSA-MCGILL STUDY AREA

	<u>Potential Retail Sales</u>
Employees	\$50,775,000
Hotel Guests	\$84,847,000
Residents	\$45,393,000
Attraction Visitors	<u>\$4,500,000</u>
Total	<u>\$185,516,000</u>

Source: ZHA, Inc.
retail/tot pot

Together the markets within easy walking distance to the heart of the JSA-McGill Study Area represent \$185.5 million in retail sales potential. Over 70 percent of this potential is in eating and drinking sales.



TABLE III-18

NET RETAIL SALES POTENTIAL
JSA-MCGILL STUDY AREA

Retail Potential		\$185,516,000
Est. Existing Supply	254,000	
Sales @ \$300 /SF		\$76,200,000
Net Sales Potential		<u>\$109,316,000</u>
Source: ZHA retail/net pot		

Within the same trade area, ZHA estimates that there currently exists approximately 254,000 square feet of retail. Eating and drinking establishments represent a majority of the existing supply. At \$300 per square foot, this existing retail captures approximately 40 percent of the JSA-McGill Study Area's retail potential.

Net of the existing retail supply, proximate employees, hotel guests, residents, and attraction visitors have the potential to spend over \$100 million. It is important to note that a small share of this market is actually new. Therefore, most of these sales occur either elsewhere in the Downtown or outside of the Downtown currently.

To capture a proportion of these sales will require that retail be clustered to create enough critical mass to draw the market to the JSA-McGill Study Area. Eating and drinking sales make up a vast majority of the retail sales potential. Moderately priced, "family" restaurants (*Macaroni Grill, TGIFridays*) appear to be lacking in the Downtown. Following the principles of an agglomeration economy, restaurants and clubs thrive in proximity to each other.

The most strategic location for eating and drinking establishments is Simpson Street. This street is between the attractions and many Downtown hotels. This street is convenient to the office core, where the very large employee market resides. The street is narrow making it potentially pedestrian-oriented. This street is also of a scale where a modestly sized development can have a major impact on the street environment.

Additional, stand alone retail will have potential on Alexander Street. Alexander is slated to become a major east-west thoroughfare. Retail will be drawn to the visibility of this location. Convenience retail (food and drug) will likely develop at this location.



TABLE III-19

SUPPORTABLE RETAIL SPACE
JSA-MCGILL STUDY AREA
2010

Net Potential Retail Sales	\$109,316,000	\$109,316,000
Capture	<u>20%</u>	<u>25%</u>
Supportable Sales	\$21,863,200	\$27,329,000
Supportable Square Feet	75,000	100,000

Source: ZHA
retail/conc

ZHA concludes that between 75,000 and 100,000 square feet of retail are likely supportable in the JSA-McGill Study Area through 2010. This projection represents a capture rate between 20 and 25 percent of net potential. The remaining potential will be captured outside of the Study Area. The projected JSA-McGill Study Area's supportable retail sales represent 1 percent of the City's net new retail sales potential through 2010.

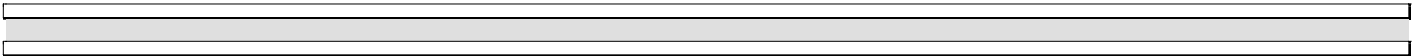
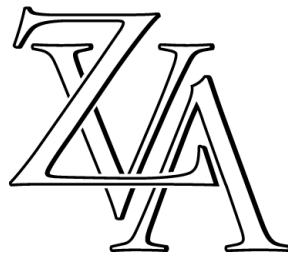
MARKET POSITION ANALYSIS

JSA-McGill LCI Study Area

Downtown Atlanta
City of Atlanta, Georgia

December 18, 2003

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MARKET POSITION ANALYSIS

JSA-McGill LCI Study Area

Downtown Atlanta
City of Atlanta, Georgia

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Tables 1 through 3 outline the optimum market position for new residential development within the JSA-McGill LCI Study Area, in Downtown Atlanta, Georgia. Supply-side data are summarized in Tables 4 and 5. The Appendix Tables contain migration and target market data covering the appropriate draw areas for the study area.

INTRODUCTION

This analysis outlines the optimum market position for new residential development within the JSA-McGill LCI Study Area, located in the northwest section of Downtown Atlanta, Georgia. The JSA-McGill LCI Study Area encompasses the area extending beyond Alexander Street/Ralph McGill Boulevard to the north, Piedmont Avenue in the east, Baker Street in the south, and Marietta Street in the west.

The extent and characteristics of the potential market for new housing units within the Study Area were identified using Zimmerman/Volk Associates' proprietary target market methodology. This methodology was developed in response to the challenges that are inherent in the application of supply/demand analysis to urban development and redevelopment. Historically, many urban neighborhoods have experienced population loss, often severe; since conventional supply/demand analyses generally project the continuation of past trends, the forecasts of "demand" in these neighborhoods are often minimal, if not negative. Supply/demand analysis ignores the potentially-significant impact of newly-introduced housing supply on settlement patterns, particularly when that supply is specifically targeted to match the housing preferences and economic capabilities of the draw area households.

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In contrast to conventional supply/demand analysis, then—which is based on supply-side dynamics and baseline demographic projections—target market analysis determines the depth and breadth of the potential market derived from the housing preferences and socio-economic characteristics of households in the defined draw area, even in locations where no close comparables exist. Because it considers not only basic demographic characteristics, such as income qualification and age, but also less-frequently analyzed attributes such as mobility rates, lifestyle patterns and household compatibility issues, the target market methodology is particularly effective in defining a realistic housing potential for urban development and redevelopment.

This study therefore determined:

- Where the potential renters and buyers for new housing units within the JSA-McGill Study Area are likely to move from (the draw areas);
- Who currently lives in the draw areas and what they are like (the target markets);
- How many are likely to move to the study area if appropriate housing units were to be made available (depth and breadth of the market);
- What their housing preferences are in aggregate (rental or ownership, multi-family or single-family);
- What they will pay to rent or purchase newly-created dwelling units within the study area (market-rate prices); and
- What their alternatives are (new construction or existing housing stock within Downtown Atlanta).

The target market methodology is described in detail in the METHODOLOGY section at the end of this study.

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MARKET POTENTIAL

American households, perhaps more than any other nation's, have always demonstrated extraordinary mobility. Last year, depending on region, between 15 and 20 percent of American households moved from one dwelling unit to another. Household mobility is higher in urban areas; a higher percentage of renters move than owners; and a higher percentage of younger households move than older households.

Analysis of migration, mobility and geo-demographic characteristics of households currently living within defined draw areas is therefore integral to the determination of the depth and breadth of the potential market for new units within the JSA-McGill Study Area.

—DRAW AREAS—

Based on Zimmerman/Volk Associates' field investigation, analysis of migration and mobility data, and assessment of the assets and opportunities of Downtown Atlanta, new housing units within Downtown are likely to attract potential renters and buyers from elsewhere in the City of Atlanta; the balance of Fulton and DeKalb Counties; other counties in the Atlanta region; and several other Georgia counties. Additional significant draw areas include Miami, Jacksonville, and Tampa, Florida; New York City; Charlotte, North Carolina; Memphis and Nashville, Tennessee; and Dallas and Houston, Texas. This analysis also factors in all other counties represented in City of Atlanta/Fulton County migration. (*See METHODOLOGY below.*)

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—ANNUAL POTENTIAL MARKET—

As determined by the target market methodology, which accounts for household mobility within the City of Atlanta and Fulton and DeKalb Counties as well as mobility patterns for households currently living in all other counties, in the year 2003, more than 7,800 younger singles and couples, empty nesters and retirees, and traditional and non-traditional families currently living in the draw areas comprise the target markets for new market-rate dwelling units within Downtown Atlanta. The housing preferences of these draw area households—according to tenure (rental or ownership) and broad financial capacity—can be arrayed as follows (*see also* Table 1):

Potential Market For New Housing Units DOWNTOWN ATLANTA City of Atlanta, Georgia		
HOUSING TYPE	NUMBER OF HOUSEHOLDS	PERCENT OF TOTAL
Multi-family for-rent	2,280	29.1%
Multi-family for-sale	1,170	14.9%
Single-family attached for-sale	920	11.7%
Low-range single-family detached	1,130	14.4%
Mid-range single-family detached	1,030	13.3%
High-range single-family detached	<u>1,300</u>	<u>16.6%</u>
Total	7,830	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2003.

From the perspective of draw area target market propensities and compatibility, and within the context of Downtown Atlanta's new housing marketplace, the potential market for new housing units within Downtown could include the full range of housing types, from higher-density multi-family to lower-density single-family detached. However, given high land costs, it is likely that a much lower percentage of new single-family detached dwelling units could be created within Downtown, including the in-town neighborhoods, than within more suburban areas of the city. Based on the tenure preferences and income levels of the draw area households, then, and including a reduction in the proportion of detached dwelling units, the distribution of all housing types would be as follows: (*See again* Table 1.)

Table 1

Potential Housing Market

Derived From New Unit Purchase And Rental Propensities Of Draw Area Households
With The Potential To Move To The Area In 2003

Downtown Atlanta

City of Atlanta, Georgia

Total Target Market Households With The Potential
To Rent/Purchase Market-Rate Dwelling Units In The
City of Atlanta 27,870

Total Target Market Households With The Potential
To Rent/Purchase Market-Rate Dwelling Units In
Downtown Atlanta 7,830

Potential Housing Market

	<i>Multi-Family</i>		<i>Single-Family</i>			<u>Total</u>	
	<u>For-Rent</u>	<u>For-Sale</u>	<i>.. Attached ..</i> <u>All Ranges</u>	<i>..... Detached</i> <u>Low-Priced</u>	<u>Mid-Priced</u>		<u>High-Priced</u>
Total Households:	2,280	1,170	920	1,130	1,030	7,830	
{Mix Distribution}:	29.1%	14.9%	11.7%	14.4%	13.3%	16.6%	100.0%

Target Residential Mix (Including In-Town Neighborhoods)

	<i>Multi-Family</i>		<i>Single-Family</i>			<u>Total</u>	
	<u>For-Rent</u>	<u>For-Sale</u>	<i>.. Attached ..</i> <u>All Ranges</u>	<i>..... Detached</i> <u>Low-Priced</u>	<u>Mid-Priced</u>		<u>High-Priced</u>
Total Households:	2,280	1,170	920	570	520	6,110	
{Mix Distribution}:	37.3%	19.1%	15.1%	9.3%	8.6%	10.6%	100.0%

Target Residential Mix (JSA-McGill Area)

	<i>Multi-Family</i>		<u>Total</u>
	<u>For-Rent</u>	<u>For-Sale</u>	
Total Households:	2,280	1,170	3,450
{Mix Distribution}:	66.1%	33.9%	100.0%

NOTE: Reference Appendix One, Tables 1 through 13.

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

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Target Residential Mix
 (Including In-Town Neighborhoods)
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSING TYPE	NUMBER OF HOUSEHOLDS	PERCENT OF TOTAL
Multi-family for-rent	2,280	37.3%
Multi-family for-sale	1,170	19.1%
Single-family attached for-sale	920	15.1%
Low-range single-family detached	570	9.3%
Mid-range single-family detached	520	8.6%
High-range single-family detached	<u>650</u>	<u>10.6%</u>
Total	6,110	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2003.

Given the JSA-McGill LCI Study Area’s proximity to Atlanta’s core Downtown, it is highly recommended that new construction within the study area concentrate on the higher-density multi-family housing types that support urban redevelopment most efficiently. The distribution of multi-family dwelling units, based on the tenure preferences and income levels of the draw area households that represent the potential market for new residential development within the Study Area each year over the next five years, would be as follows: (*See again* Table 1.)

Annual Potential Market
 For Multi-Family Dwelling Units
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSING TYPE	NUMBER OF HOUSEHOLDS	PERCENT OF TOTAL
Multi-family for-rent	2,280	66.1%
Multi-family for-sale	<u>1,170</u>	<u>33.9%</u>
Total	3,450	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2003

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—TARGET RESIDENTIAL MIX: 1,500 UNITS—

Based on the proportions of multi-family dwelling units and net densities (derived from the building types preferred by participants at the JSA-McGill charrette) as outlined in the optimum market position below, the study area could support, and the market could absorb over five years, at least 1,500 new dwelling units within a redevelopment of the area.

Following the proportions of multi-family rental and for-sale dwelling units as established by the target residential mix, the distribution of 1,500 new housing units would be as follows:

Target Residential Mix—1,500 Units
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSING TYPE	PERCENT OF TOTAL	NUMBER OF UNITS
Multi-family for-rent	66.1%	992
Multi-family for-sale	<u>33.9%</u>	<u>508</u>
Total	100.0%	1,500

SOURCE: Zimmerman/Volk Associates, Inc., 2003

The target mix for the study area contains over 66 percent rental apartments; the proportion of rental and for-sale housing types, outlined above, are appropriate because rental dwelling units, particularly market-rate, are the linchpin of urban redevelopment. Market-rate rentals should be introduced as quickly as possible, for several important reasons:

- Rental apartments are required for the establishment of “critical mass,” because rentals are absorbed at higher rates than for-sale units.
- Rentals are the fastest way to bring a large number of households to a site.
- Rentals allow households to experiment with living in an area without the mortgage commitment of home ownership.
- Renters form a pool of potential purchasers of for-sale housing types in later phases.

Urban Collage and Cooper Carry have designed a master plan for the study area that represents a reconciliation of urban design principles, neighborhood and city objectives, and the preliminary

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market analysis presented during the JSI-McGill LCI Study Area charrette held in September 2003. The master plan accommodates 4,814 new dwelling units in a mix of rental and for-sale multi-family housing types.

The distribution of 4,814 dwelling units, reflecting the proportions of housing types as outlined for the target residential mix above, would therefore be as follows:

Target Residential Mix—4,814 Units
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSING TYPE	PERCENT OF TOTAL	NUMBER OF UNITS
Multi-family for-rent	66.1%	3,182
Multi-family for-sale	<u>33.9%</u>	<u>1,632</u>
Total	100.0%	4,814

SOURCE: Zimmerman/Volk Associates, Inc., 2003

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TARGET MARKETS

As determined by this analysis, the potential market for new multi-family housing units within the JSA-McGill LCI Study Area and Downtown Atlanta can be characterized by general household type as follows (*see also* Table 2):

Potential Market
 By Household and Unit Types
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSEHOLD TYPE	PERCENT OF TOTAL	RENTAL MULTI-FAM.	FOR-SALE MULTI-FAM.
Empty-Nesters & Retirees	24%	23%	26%
Traditional & Non-Traditional Families	7%	7%	6%
Younger Singles & Couples	<u>69%</u>	<u>70%</u>	<u>68%</u>
Total	100%	100%	100%

SOURCE: Zimmerman/Volk Associates, Inc., 2003.

- The largest general market segment is composed of younger, mostly childless households (younger singles and couples).

Younger singles and couples currently represent just under 70 percent of the market for housing in Downtown Atlanta. If the preference for Downtown housing demonstrated by the leading edge of the Millennial generation—those persons born between 1977 and 1996 and the second largest generation after the Baby Boomers—is representative of the entire generation, the market potential from this segment is likely to remain very strong over the next decade.

- The next largest market segment is comprised of older households (empty nesters and retirees).

Empty-nest and retiree households currently comprise just under a quarter of the market for housing units in Downtown. However, over the next several years, this market

Table 2

Potential Housing Market By Household Type
 Derived From New Unit Purchase And Rental Propensities Of Draw Area Households
 With The Potential To Move To The Area In 2003

Downtown Atlanta

City of Atlanta, Georgia

Potential Housing Market

	<i>Multi-Family</i>		<i>Single-Family</i>					
	<u>Total</u>	<u>For-Rent</u>	<u>For-Sale</u>	<i>Attached</i>		<i>Detached</i>		
				<u>All Ranges</u>	<u>Low-Price</u>	<u>Mid-Price</u>	<u>High-Price</u>	
Number of Households:	7,830	2,280	1,170	920	1,130	1,030	1,300	
Empty Nesters & Retirees	42%	23%	26%	27%	49%	59%	77%	
Traditional & Non-Traditional Families	4%	7%	6%	14%	18%	5%	2%	
Younger Singles & Couples	54%	70%	68%	59%	33%	36%	21%	
	100%	100%	100%	100%	100%	100%	100%	

Target Residential Mix (JSA-McGill Area)

	<i>Multi-Family</i>		
	<u>Total</u>	<u>For-Rent</u>	<u>For-Sale</u>
Number of Households:	3,450	2,280	1,170
Empty Nesters & Retirees	24%	23%	26%
Traditional & Non-Traditional Families	7%	7%	6%
Younger Singles & Couples	69%	70%	68%
	100%	100%	100%

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

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segment should comprise a significantly larger proportion of the market for Downtown housing because increasing numbers of the “Baby Boom” generation—the huge population cohort born between 1946 and 1964—will be entering the empty-nest life stage. Baby Boomers have become a significant market for new construction in Downtown neighborhoods, particularly when those new units reflect their changing lifestyles.

- The third, and smallest, general market segment is comprised of family-oriented households (traditional and non-traditional families).

Family-oriented households currently comprise just seven percent of the market for housing units in Downtown Atlanta. Households with school-age children have historically been among the first to leave a city when one or all of three significant neighborhood elements—good schools, safe and secure streets, and sufficient green space—are perceived to be at risk. Although this is the smallest market segment, the target family groups for Downtown have a preference for urban living. Most of the adults in these households were raised in or near an urban center and have rejected the suburban alternative; most will already have made appropriate school accommodations—public, charter, parochial or private.

JSA-McGill LCI Study Area
 Downtown Atlanta
 City of Atlanta, Georgia
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OPTIMUM MARKET POSITION

The optimum market position for new dwelling units within a redevelopment of the JSA-McGill LCI Study Area—which, according to Urban Collage, contains approximately 34 acres of vacant/underutilized property—has been derived from Zimmerman/Volk Associates’ proprietary target market methodology and the company’s extensive experience with urban development and redevelopment.

Based on the tenure preferences of the target draw area households, their income and equity levels, and the relevant residential context in Downtown Atlanta, the general range of rents and prices for newly-created multi-family residential units that could currently be supported by the market is as follows (*see Table 3 for the optimum market position and Tables 4 and 5 for the market context*):

Optimum Market Position
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

NUMBER	AVERAGE NET DENSITY	HOUSING TYPE	BASE RENT/PRICE RANGE	UNIT SIZE RANGE	RENT/PRICE PER SQ. FT.
MULTI-FAMILY FOR-RENT—66.1%					
496	70 du/acre	Loft Apts.	\$700 to \$2,000/mo.	500 to 1,500	\$1.33 to \$1.40
376	70 du/acre	Conventional Apts.	\$850 to \$1,900/mo.	550 to 1,350	\$1.41 to \$1.55
120	50 du/acre	Luxury Apts.	\$1,800 to \$3,000/mo.	900 to 1,650	\$1.82 to \$2.00
MULTI-FAMILY FOR-SALE—33.9%					
254	50 du/acre	Loft Apts.	\$125,000 to \$350,000	500 to 1,500	\$233 to \$250
164	50 du/acre	Conventional Apts.	\$250,000 to \$400,000	850 to 1,500	\$267 to \$294
90	30 du/acre	Luxury Apts.	\$335,000 to \$550,000	1,000 to 1,800	\$306 to \$335
1,500 total units					

SOURCE: Zimmerman/Volk Associates, Inc., 2003

Table 3

Optimum Market Position--1,500 Dwelling Units
JSA-McGill Area
Downtown Atlanta
City of Atlanta, Georgia
September, 2003

<i>Percent of Units</i>	<i>Average Net Density</i>	<i>Housing Type</i>	<i>Unit Type</i>	<i>Base Rent/Price Range*</i>	<i>Base Unit Size Range</i>	<i>Base Rent/Price Per Sq. Ft.*</i>	<i>Annual Average Absorption</i>
66.1%		Multi-Family For-Rent					240
496	70 du	Loft Apartments <i>Open Floorplans</i>		\$700 to \$2,000	500 to 1,500	\$1.33 to \$1.40	108
376	70 du	Conventional Apartments <i>Studios to 3-Bedrooms</i>	Studio 1br/1ba 2br/1ba 2br/2ba 3br/2ba	\$850 \$1,150 \$1,250 \$1,450 \$1,900	550 750 850 1,000 1,350	\$1.55 \$1.53 \$1.47 \$1.45 \$1.41	84
120	50 du	Luxury Apartments <i>1- to 3-Bedrooms</i>	1br/1.5ba 2br/2.5ba 3br/2.5ba	\$1,800 \$2,400 \$3,000	900 1,250 1,650	\$2.00 \$1.92 \$1.82	48
33.9%		Multi-Family For-Sale					120
254	50 du	Loft Apartments <i>Open Floorplans</i>		\$125,000 to \$350,000	500 to 1,500	\$233 to \$250	60
164	50 du	Conventional Apartments <i>1- to 3-Bedrooms</i>	1br/1.5ba 2br/1.5ba 2br/2.5ba 3br/2.5ba	\$250,000 \$275,000 \$325,000 \$400,000	850 950 1,150 1,500	\$294 \$289 \$283 \$267	36
90	30 du	Luxury Apartments <i>1- to 3-Bedrooms</i>	1br/1.5ba 2br/2.5ba 3br/2.5ba	\$335,000 \$450,000 \$550,000	1,000 1,400 1,800	\$335 \$321 \$306	24
100.0%							360
1,500 Dwelling Units							

* Base rents/prices in year 2003 dollars and exclude floor and view premiums, options and upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

Summary Of Selected Downtown And Benchmark Rental Properties

City of Atlanta, Fulton County, Georgia

August/November, 2003

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
<i>..... Fairlie-Poplar</i>					
The Muses (1996) <i>50 Peachtree Street</i>	65				96% occupancy
	Studio	\$685	610	\$1.12	
	1BR/1BA	\$885	720	\$0.94	
		\$1,185	1,255	\$1.23	
	2BR/1BA	\$1,085	1,050	\$1.03	
	2BR/1.5BA	\$1,185	1,050 to 1,100	\$1.13 to \$1.08	
	2BR/2BA	\$1,285 to \$1,585	1,330	\$0.97 to \$1.19	
<i>..... Centennial Place</i>					
Centennial Place <i>Centennial Olympic Park Dr.</i>	738				97% occupancy <i>427 affordable and 311 market rate units.</i>
	1BR/1BA	\$790	688	\$1.15	
	2BR/1BA	\$975	875	\$1.11	
	2BR/2BA	\$1,140	1,050	\$1.09	
	2BR/1.5BA - TH	\$1,150 to \$1,260	1,075 to 1,231	\$1.02 to \$1.07	<i>Larger 2 and 3 bedroom TH's include garage.</i>
	3BR/2.5BA - TH	\$1,465 to \$1,553	1,340 to 1,441	\$1.08 to \$1.09	
Hotel Roxy (1995) <i>768 Marietta Street</i>	18				83% occupancy
	Studio	\$650	650	\$1.00	
	1BR/1BA	\$950	880	\$1.08	
	Flat	\$1,000 to \$1,300	1,000 to 1,300	\$1.00 to \$1.00	
	2BR/1BA	\$1,200 to \$1,500	1,200 to 1,600	\$0.75 to \$1.00	

Summary Of Selected Downtown And Benchmark Rental Properties

City of Atlanta, Fulton County, Georgia

August/November, 2003

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
<i>..... Bedford-Pine</i>					
Overview at Simpsons	130				
	Studio	\$400 to \$450	350 to 490	\$0.92 \$0.92	
Post Renaissance (1993) <i>400 Central Park Place</i>	342				95% occupancy
	Studio	\$725	625	\$1.16	
	1BR/1BA	\$880 to \$1,150	650 to 900	\$1.35 to \$1.44	
	2BR/2BA	\$1,300 to \$1,350	1,300 to 1,380	\$0.98 to \$1.00	
	3BR/2BA	\$1,600	1,580	\$1.01	
450 Piedmont (1997) <i>450 Piedmont</i>	254				96% occupancy
	1BR/1BA	\$730 to \$1,050	587 to 901	\$1.17 to \$1.24	
	2BR/2BA	\$1,425	1,314	\$1.08	
Gables Cityscape (1985) <i>300 Cityline Ave</i>	170				89% occupancy <i>2 months free special.</i>
	1BR/1BA	\$785 to \$1,075	540 to 950	\$1.13 to \$1.45	
	2BR/2BA	\$1,155 to \$1,320	1,100 to 1,250	\$1.05 to \$1.06	
Enclave at Renaissance					
	1BR/1BA	\$925 to \$1,075	850 1,075	\$1.09 to \$1.26	
	2BR/2BA	\$1,455	1,370	\$1.06	
Savannah Midtown (2002) <i>215 North Ave</i>	322				94% occupancy <i>3 months free special on one-bedrooms only.</i>
	1BR/1BA	\$1,180 to \$1,400	747 to 964	\$1.45 to \$1.58	
	2BR/2BA	\$1,680 to \$1,799	1,204 to 1,342	\$1.34 to \$1.40	

Summary Of Selected Downtown And Benchmark Rental Properties

City of Atlanta, Fulton County, Georgia

August/November, 2003

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
. <i>Sweet Auburn</i>					
Auburn Glen (UC)	271				Under Construction
124	1BR/1BA	\$600 or \$850	696	\$0.86 or \$1.22	25% "market-rate" (higher listed rents for each unit type) apartments.
134	2BR/1-2BA	\$730 or \$1,200	1,044	\$0.70 or \$1.15	
13	3BR/2BA	\$950 or \$1,300	1,218	\$0.78 or \$1.07	
. <i>Old Fourth Ward</i>					
Ford Factory Lofts	122				
699 Ponce De Leon Avenue	1BR/1BA	\$695 to \$810	600 to 750	\$1.08 to \$1.16	
	2BR/1BA	\$910	900	\$1.01	
	2BR/2BA	\$950 to \$1,350	1,000 to 1,200	\$0.95 to \$1.13	
. <i>Inman Park</i>					
Studioplex at Auburn *	112				89% occupancy
Auburn Street		\$760 to \$1,200	760 to 1,200	\$1.00	
. <i>Cabbagetown</i>					
Fulton Cotton Mill (1998)	526				89% occupancy - Phase I
170 Boulevard SE	Studio	\$655 to \$1,129	655 to 1,129	\$1.00 to \$1.00	84% occupancy - Phase II
	1BR/1BA	\$780	712	\$0.86	1 1/2 months free.
		\$1,450	1,680	\$1.10	
	2BR/2BA	\$1,030 to \$1,800	1,018 to 2,300	\$0.78 to \$1.01	

* Live/Work building. Total units does not include 26 retail units (350-450 sqft) or 17 commercial units (1,675-2,250 sqft). Retail is 100% occupied, commercial is 88% occupied.

SOURCE: Zimmerman/Volk Associates, Inc.

Summary Of Selected Downtown And Benchmark Rental Properties

City of Atlanta, Fulton County, Georgia

August/November, 2003

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
. <i>Castleberry Hill</i>					
Village at Castleberry Hill (1999)	450				98% occupancy
<i>Northside Drive</i>	1BR/1BA	\$795	710	\$1.12	<i>2 month free special on 1st floor units only.</i>
	2BR/1BA	\$921	890	\$1.03	
	2BR/2BA	\$995 to \$1,300	947 to 1,134	\$1.05 to \$1.15	
	3BR/2BA	\$1,250	1,138	\$1.10	
Legacy Lofts/ Intown Lofts (2002/2003)	73				98% occupancy
<i>170 Northside Drive</i>	1BR/1BA	\$900 to \$1,290	730 to 1,000	\$1.23 to \$1.29	<i>2 months free.</i>
	1BR/1BA - Den	\$1,400 to \$1,505	1,120 to 1,170	\$1.25 to \$1.29	
	2BR/2BA	\$1,190 to \$1,615	985 to 1,260	\$1.21 to \$1.28	

Summary Of Selected Downtown Benchmark For-Sale Properties
City of Atlanta, Fulton County, Georgia
August/November, 2003

<i>Development (Init. Occ.)</i>	<i>Unit Type</i>	<i>Unit Price Range</i>	<i>Unit Size Range</i>	<i>Price Per Sq. Ft.</i>	<i>Total Units</i>	<i>Total Sales (Monthly Average)</i>
<i>Developer/Builder</i>						
<i>..... Fairlie-Poplar</i>						
The William Oliver (10/02)					115	104 (8.6)
<i>Skelton Development</i>	CO	\$65,900 to \$189,900	465 to 1,310	\$142 to \$145		
The Healey Building (2002)					108	81 (6.2)
	CO	\$211,900 to \$314,900	949 to 1,400	\$225 to \$223		
<i>..... Centennial Place</i>						
The Giant (12/02)					47	37 (3.4)
<i>Seed Partners</i>	CO	\$221,500 to \$335,000	1,477 to 2,127	\$150 to \$157		
<i>..... Centennial Hill</i>						
Centennial House (6/02)					101	80 (6.7)
	CO	\$163,900 to \$209,000	899 to 1,032	\$182 to \$203		
Museum Tower (8/02)					162	100 (8.3)
<i>Centennial Hill Development Partners, LLC</i>	CO	\$209,900 to \$649,900	870 to 1,808	\$241 to \$359		
Centennial Park West (7/02)					95	78 (1.9)
<i>Legacy Property Group</i>	CO	\$290,000 to \$2,000,000	1,062 to 4,689	\$273 to \$427		

Summary Of Selected Downtown Benchmark For-Sale Properties
City of Atlanta, Fulton County, Georgia
August/November, 2003

<i>Development (Init. Occ.)</i>	<i>Unit Type</i>	<i>Unit Price Range</i>	<i>Unit Size Range</i>	<i>Price Per Sq. Ft.</i>	<i>Total Units</i>	<i>Total Sales (Monthly Average)</i>
<i>Developer/Builder</i>						
<i>..... Bedford-Pine</i>						
Windsor Over Peachtree (1968:2000)					260	240 (6.7)
<i>American Invsco</i>	CO	\$182,367 to \$334,702	800 to 1,350	\$228 to \$248		
Central Park Lofts (2/02)					35	21 (1.8)
<i>H. J. Russell</i>	CO	\$246,400 to \$351,400	1,285 to 1,531	\$192 to \$230		
<i>..... Sweet Auburn Area</i>						
Cityscape Condos (2003)					38	4 (4.0)
<i>Vision Holdings LLC</i>	CO	\$89,900 to \$128,000	630 to 730	\$143 to \$175		
City View (10/03)					56	
	CO	\$135,000 to \$237,900		\$191 {average}		
Brushworks Lofts (3/03)					20	16 (3.2)
	CO	\$139,900 to \$282,500		\$145 {average}		
Dynamic Metal Lofts (2003)					39	17 (1.6)
<i>HDDC</i>	CO	\$159,000 to \$315,000	850 to 1,790	\$176 to \$187		

Summary Of Selected Downtown Benchmark For-Sale Properties
City of Atlanta, Fulton County, Georgia
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<i>Development (Init. Occ.)</i>	<i>Unit Type</i>	<i>Unit Price Range</i>	<i>Unit Size Range</i>	<i>Price Per Sq. Ft.</i>	<i>Total Units</i>	<i>Total Sales (Monthly Average)</i>
<i>Developer/Builder</i>						
<i>..... Cabbagetown</i>						
Green Street (UC)*					250	
	SF	\$300,000 to	2,000 to	\$133	50	
<i>Builders Guild - TBA</i>		\$400,000	3,000	\$150		
<i>Sales Team - TBA</i>	TH	\$200,000 to	1,800	\$111 to	50	
		\$400,000	2,500	\$160		
	CO	\$150,000 to	600 to	\$231 to	150	
		\$300,000	1,300	\$250		
<i>..... Castleberry Hill</i>						
Century Lofts (2003)					31	8 (2.0)
	CO	\$144,900 to	1,050 to	\$138 to		
		\$349,000	2,200	\$159		

* Prices and Total units are estimates. Total units represent 1st Phase.
 Construction is expected to begin Nov/Dec. 2003

SOURCE: Zimmerman/Volk Associates, Inc.

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The above rents and prices are in year 2003 dollars and apply to the initial units only. The proposed rents and prices are also exclusive of options, upgrades, and floor and view premiums; significant premiums should be achieved on units with skyline views.

—ABSORPTION FORECASTS—

The optimum market position has been designed to maximize values and the potential for escalation, yet achieve sell-out within a reasonable time frame. Absorption of a total of 1,500 dwelling units within the Study Area could be achieved in several buildings within five years from commencement of marketing, depending on phasing and construction, and barring a significant and persistent downturn in the national, regional and local economies over that time frame. The total of 4,814 dwelling units that can be achieved within the master plan would require between 12 and 15 years to achieve full build-out.

Annual Absorption
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

Multi-family for-rent	240
Loft apartments	108
Conventional apartments	84
Luxury apartments	48
Multi-family for-sale	120
Loft apartments	60
Conventional apartments	36
Luxury apartments	24
Total	360

SOURCE: Zimmerman/Volk Associates, Inc., 2003.

At the forecast absorption of 360 units in one year, new residential development within the Study Area would require a capture rate of 10.4 percent of the 3,450 households, identified through target market analysis, that have the potential to rent or purchase new multi-family dwelling units within the Study Area in the year 2003—a rate that is within the target market methodology’s parameters of feasibility.

The annual absorption paces require specific capture rates of those households that, in the year 2003, represent the target markets for multi-family housing within the Study Area, as follows:

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Capture of the Potential Market
 Based on Absorption Forecasts
 THE JSA-MCGILL LCI STUDY AREA
 DOWNTOWN ATLANTA
 City of Atlanta, Georgia

HOUSING TYPE	ANNUAL MARKET POTENTIAL (HHS)	AVERAGE ANNUAL ABSORPTION (UNITS)	CAPTURE RATE
Multi-family for-rent	2,280	240	10.5%
Multi-family for-sale	1,170	120	10.3

SOURCE: Zimmerman/Volk Associates, Inc., 2003

These housing type-specific capture rates are well within the parameters required for feasible development. For a redevelopment within an area of the size and scale of the JSA-McGill LCI Study Area, there is a high degree of confidence in a capture rate of up to 20 percent of the market for each housing type.

NOTE: The target market capture rates of the potential purchaser or renter pool are a unique and highly-refined measure of feasibility. Target market capture rates are not equivalent to—and should not be confused with—penetration rates or traffic conversion rates.

The target market capture rate is derived by dividing the annual forecast absorption by the number of households that have the potential to move to the site in a given year.

The penetration rate is derived by dividing the total number of dwelling units planned for a property by the total number of draw area households, sometimes qualified by income.

The traffic conversion rate is derived by dividing the total number of buyers or renters by the total number of prospects that have visited a site.

Because the prospective market for a property is more precisely defined using target market methodology, a substantially smaller number of households are qualified; as a result, target market capture rates are higher than the more grossly-derived penetration rates. The resulting higher capture rates remain within the range of feasibility.

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PREFERRED BUILDING TYPES

- **Loft Apartment Building**: Either adaptive re-use of older warehouse and manufacturing buildings or a new-construction building type inspired by those buildings. The new-construction version is usually elevator-served with double-loaded corridors.

Hard Lofts: Unit interiors typically have high ceilings and commercial windows and are minimally finished (with limited architectural elements such as columns and fin walls), or unfinished (with no interior partitions except those for bathrooms).

Soft Lofts: Unit interiors typically have high ceilings, are fully finished and often include full or partial interiors. Units may also contain architectural elements reminiscent of “hard lofts,” such as brick walls and iron railings, particularly if the building is an adaptive re-use of an existing industrial structure.

Loft apartments can also be incorporated into multifamily buildings along with conventionally-finished apartment units.

- **Apartment Building (conventional apartments)**: In new construction, an urban, pedestrian-oriented equivalent to conventional garden apartments. An urban apartment building is four or more stories, often combined with non-residential uses on the ground floor. The building should be built to the sidewalk edge and, if there are residential uses on the first floor, the front doors should be elevated significantly above grade to provide privacy and a sense of security. Parking is either below grade or in an integral structure.
- **Mansion Apartment Building (luxury apartments)**: A three- or four-story flexible-use structure with a street façade resembling a large detached house (hence, “mansion”). The building can accommodate a variety of uses—from rental or for-sale apartments, professional offices, or any of these uses over ground-floor retail—and its physical structure complements other smaller-scale buildings within a neighborhood.

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An attached version of the mansion, typically built to a sidewalk on the front lot line, is appropriate for Downtown locations. This version can accommodate the same variety of uses as the detached, lower-density mansion.

Parking behind the mansion buildings can be in open lots, in garages with units above, or integral to the building.

Mansion buildings should be strictly regulated in form, but flexible in use. However, flexibility in use is somewhat constrained by the handicapped accessibility regulations in both the Fair Housing Act and the Americans with Disabilities Act.

JSA-McGill LCI Study Area
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METHODOLOGY

The technical analysis of the market potential for the JSA-McGill LCI Study Area included delineation of the draw areas, which is based on historic settlement patterns, migration trends for the City of Atlanta, and other market dynamics.

The evaluation of the study area's market potential was derived from target market analysis of households in the draw areas, and yielded:

- The depth and breadth of the potential housing market by tenure (rental and ownership) and by type (apartments, attached and detached houses); and
- The composition of the potential housing market (empty-nesters/retirees, traditional and non-traditional families, younger singles/couples).

Target Market Methodology:

The proprietary target market methodology developed by Zimmerman/Volk Associates is an analytical technique, using the PRIZM geo-demographic system, that establishes the optimum market position for residential development of any property—from a specific site to an entire political jurisdiction—through cluster analysis of households living within designated draw areas. In contrast to classical supply/demand analysis—which is based on supply-side dynamics and baseline demographic projections—target market analysis establishes the optimum market position derived from the housing and lifestyle preferences of households in the draw area and within the framework of the local housing market context, even in locations where no close comparables exist.

In geo-demographic segmentation, clusters of households (usually between 10 and 15) are grouped according to a variety of significant factors, ranging from basic demographic characteristics, such as income qualification and age, to less-frequently considered attributes such as mobility rates, lifestyle patterns and compatibility issues. Zimmerman/Volk Associates has refined the analysis of these household clusters through the correlation of more than 500 data points related to housing preferences and consumer and lifestyle characteristics.

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As a result of this process, Zimmerman/Volk Associates has identified 41 target market groups with median incomes that enable most of the households within each group to qualify for market-rate housing. The most affluent of the 41 groups can afford the most expensive new ownership units; the least prosperous are candidates for the least expensive existing rental apartments.

Once the draw areas for specific city, location or site have been defined, then—through field investigation, analysis of historic migration and development trends, and employment and commutation patterns—the households within those areas are quantified using the target market methodology. The potential market for market-rate units is then determined by the correlation of a number of factors—including, but not limited to household mobility rates; median incomes; lifestyle characteristics and housing preferences; and the competitive environment.

Delineation of the Draw Areas (Migration Analysis)—

Taxpayer migration data provide the framework for the delineation of the draw areas—the principal counties of origin for households that are likely to move to the City of Atlanta. These data are maintained at the county and “county equivalent” level by the Internal Revenue Service and provide a clear representation of mobility patterns.

—Migration Trends—

Between 1997 and 2001, the number of households moving into Fulton County/City of Atlanta ranged between a low of just over 39,000 in 2001, the latest year for which data is available, to nearly 41,200 households in 1999. (*See Appendix One, Table 1.*) A significant percentage of the county’s in-migration is regional. Approximately 48 percent of all households who move to Fulton County move from other counties in the Atlanta metropolitan region.

Throughout the 1990s, the county had been gaining significant numbers of households each year through net in-migration; however, in 2001, the county experienced its first significant decline in net migration, losing almost 400 households in that year.

NOTE: Although net migration provides insights into the city or county’s historic ability to attract or retain households compared to other locations, it is those households likely to move into the county or city (gross in-migration) that represent external market potential.

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Based on the migration data, the draw areas for the study area have been delineated as follows:

- The local (or internal) draw area, covering households currently living within the City of Atlanta and the balance of Fulton and DeKalb Counties.
- The regional draw area, covering households currently living in the Atlanta metropolitan region (Cobb, Gwinnett, Clayton, Forsyth, Cherokee, Fayette, Douglas, Coweta, and Henry Counties).
- The Georgia draw area, covering households currently living in other Georgia Counties (Clarke, Muscogee, Chatham, Bibb, Hall and Rockdale).
- The Florida draw area, covering households currently living in major Florida metropolitan areas (Broward, Miami-Dade, Palm Beach, Duval and Hillsborough Counties).
- The national draw area, covering households currently living within all other U.S. counties.

Anecdotal information obtained from real estate brokers, sales persons, market analysts, and other knowledgeable sources corresponded to the migration data.

Migration Methodology:

County-to-county migration is based on the year-to-year changes in the addresses shown on the population of returns from the Internal Revenue Service Individual Master File system. Data on migration patterns by county, or county equivalent, for the entire United States, include inflows and outflows. The data include the number of returns (which can be used to approximate the number of households), and the median and average incomes reported on the returns.

JSA-McGill LCI Study Area
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Determination of the Potential Market for the City of Atlanta (Mobility Analysis)—

Target Market Classification of City and County Households

Geo-demographic data obtained from Claritas, Inc. provide the framework for the categorization of households, not only by demographic characteristics, but also by lifestyle preferences and socio-economic factors. For purposes of this study, only those household groups with median incomes sufficient to qualify for new housing without significant subsidies are included in the tables. An appendix containing detailed descriptions of each of these target market groups is provided along with the study.

Nearly 53 percent, or 90,605 households, of the estimated 171,860 households living in the City of Atlanta in 2003 had the financial capacity to rent or buy new housing without subsidy. Just over 63 percent of these households can be characterized as younger singles and couples, another 27.2 percent are empty nesters and retirees, and the remaining 9.6 percent are traditional and non-traditional families. (See Appendix One, Table 2.)

Just under 72 percent, or 244,545 households, of the estimated 340,470 households living in Fulton County in 2003 had the financial capacity to rent or buy new housing without subsidy. Nearly 48 percent of these households can be characterized as younger singles and couples, another 36 percent are empty nesters and retirees, and the remaining 16.1 percent are traditional and non-traditional families. (See Appendix One, Table 3.)

Of the estimated 261,535 households currently living in DeKalb County, 213,740 households, or just under 82 percent of the total, had the financial capacity to rent or buy new housing without subsidy. More than 52 percent of these households can be characterized as younger singles and couples, another 29.1 percent are empty nesters and retirees, and the remaining 18.8 percent are traditional and non-traditional families. (See Appendix One, Table 4.)

JSA-McGill LCI Study Area
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Internal Mobility (Households Moving Within The City of Atlanta)

The mobility tables, individually and in summaries, indicate the number and type of households that have the potential to move within or to the City of Atlanta in the year 2003. The total number from each draw area county is derived from historic migration trends; the number of households from each group is based on each group's mobility rate.

Zimmerman/Volk Associates uses U.S. Bureau of the Census data, combined with Claritas data, to determine the number of households in each target market group that will move from one residence to another within a specific jurisdiction in a given year (internal mobility).

Using these data, Zimmerman/Volk Associates has determined that up to 10,600 households currently living in the City of Atlanta have the potential to move from one residence to another within the city in 2003. (See Appendix One, Table 5.) Approximately 73 percent of these households are likely to be younger singles and couples (as characterized within nine Zimmerman/Volk Associates' target market groups); another 19.9 percent are likely to be empty nesters and retirees (in nine market groups); and 7.5 percent are likely to be traditional and non-traditional families (in two groups).

Approximately 8,600 households currently living in the balance of Fulton and DeKalb Counties have the potential to move to the City of Atlanta in 2003. (See Appendix One, Table 6.) Just under 57 percent of these households are likely to be younger singles and couples (as characterized within eight Zimmerman/Volk Associates' target market groups); another 25.5 percent are likely to be empty nesters and retirees (in eight market groups); and 17.8 percent are likely to be traditional and non-traditional families (in nine groups).

External Mobility (Households Moving To The City of Atlanta)

These tables determine the number of households in each target market group living in each draw area county that are likely to move to the City of Atlanta in 2003 (again, through a correlation of Claritas data, U.S. Bureau of the Census data, and the Internal Revenue Service migration data). (See Appendix One, Tables 7 through 9 and Appendix Two, Tables 1 through 45.)

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The total potential market for the City of Atlanta includes the local, regional, and national draw areas. (See Appendix One, Table 10.) The numbers in the Total column on page one of this table indicate the depth and breadth of the potential market for new and existing dwelling units in the City of Atlanta in the year 2003 from the draw areas. Nearly 27,900 households have the potential to move within or to the city this year.

Determination of the Potential Market for the Downtown Atlanta—

The total potential market for Downtown Atlanta also includes the above draw areas. Zimmerman/Volk Associates uses U.S. Bureau of the Census data, combined with Claritas data, to determine which target market groups, as well as how many households within each group, are likely to move to Downtown in a given year.

Using these data, Zimmerman/Volk Associates has determined that 9,700 households have the potential to move to Downtown in 2003. (See Appendix One, Table 11.) Just over 55 percent of these households are likely to be younger singles and couples (in 10 market groups); another 35.7 percent are likely to be empty nesters and retirees (in 10 groups); and the remaining 9.3 percent are likely to be traditional and non-traditional families (in four groups).

The 9,700 draw area households that have the potential to move to Downtown Atlanta in 2003 have been categorized by tenure propensities to determine the appropriate renter/owner ratio. Approximately 23.5 percent of these households (or 2,280 households) comprise the potential market for rental units at the rent levels required to support newly-constructed market-rate housing. (See Appendix One, Table 12.) Approximately 57 percent (or 5,550 households) comprise the market for ownership housing units.

Of these 5,550 households, 21.1 percent (or 1,170 households) comprise the market for multi-family for-sale units (condominium apartments and lofts); another 16.6 percent (920 households) comprise the market for attached single-family (townhouse or duplex) units. Just over 62 percent (or 3,460 households) comprise the market for all ranges of single-family detached houses. (See Appendix One, Table 13.)

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—Target Market Data—

Target market data are based on the Claritas PRIZM geo-demographic system, modified and augmented by Zimmerman/Volk Associates as the basis for its proprietary target market methodology. Target market data provides number of households by cluster aggregated into the three main demographic categories—empty nesters and retirees; traditional and non-traditional families; and younger singles and couples.

Zimmerman/Volk Associates' target market classifications are updated periodically to reflect the relentless changes in the composition of American households. Because of the nature of geo-demographic segmentation, a change in household classification is directly correlated with a change in geography, *i.e.*—a move from one neighborhood condition to another. However, these changes of classification can also reflect an alteration in one of three additional basic characteristics:

- Age;
- Household composition; or
- Economic status.

Age, of course, is the most predictable, and easily-defined of these changes. Household composition has also been relatively easy to define; recently, with the growth of non-traditional households, however, definitions of a family have had to be expanded and parsed into more highly-refined segments. Economic status remains clearly defined through measures of annual income and household wealth.

A change in classification is rarely induced by a change in just one of the four basic characteristics. This is one reason that the target household categories are so highly refined: they take in multiple characteristics. Even so, there are some rough equivalents in household types as they move from one neighborhood condition to another. There is, for example, a strong correlation between the *Suburban Achievers* and the *Urban Achievers*; a move by the *Suburban Achievers* to the urban core can make them *Urban Achievers*, if the move is accompanied by an upward move in socio-economic status. In contrast, *Suburban Achievers* who move up socio-economically, but remain within the metropolitan suburbs may become *Fast-Track Professionals* or *The VIPs*.

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Household Classification Methodology:

Household classifications are based on the Claritas PRIZM geo-demographic segmentation system, which was established in 1974 and is the most widely-used neighborhood target marketing system in the United States. Claritas uses 15 unique clustering algorithms to define various domains of affluence and settlement density. These algorithms isolate the key factors in each density-affluence domain that accounted for the most statistical difference among neighborhoods within that group.

Over the past 15 years, Zimmerman/Volk Associates has augmented the PRIZM cluster system for use within the company's proprietary target market methodology specific to housing and neighborhood preferences, with additional algorithms, correlation with geo-coded consumer data, aggregation of clusters by broad household definition, and unique cluster names. For purposes of this study, only those household groups with median incomes that enable most of the households within each group to qualify for market-rate housing are included in the tables.



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Research & Strategic Analysis

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Research & Strategic Analysis

ASSUMPTIONS AND LIMITATIONS—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the methodology employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.



Appendix Two

TARGET MARKET TABLES

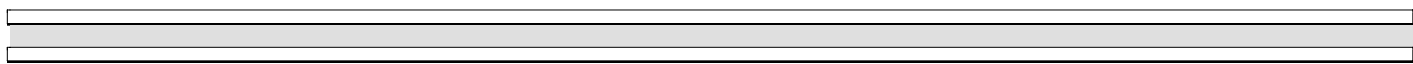
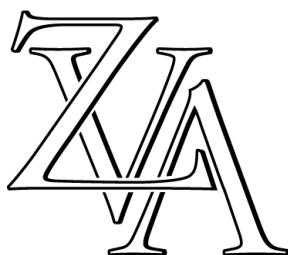
MARKET POSITION ANALYSIS

JSA-McGill LCI Study Area

Downtown Atlanta
City of Atlanta, Georgia

December 18, 2003

Conducted by
ZIMMERMAN / VOLK ASSOCIATES, INC.
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Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Cobb County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	56,300	420	21.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	48,725	360	18.0%
<i>Small Cities/Edge Cities</i>	7,575	60	3.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	113,550	970	48.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	42,670	440	22.0%
<i>Small Cities/Edge Cities</i>	47,845	530	26.5%
<i>Town & Country/Exurbs</i>	23,035	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	49,160	610	30.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	27,760	340	17.0%
<i>Small Cities/Edge Cities</i>	21,400	270	13.5%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	219,010	2,000	100.0%
Total County Households:	237,410		
Classified Households As A Share Of Total County Households:	92.2%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Cobb County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	56,300	420	21.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	6,910	50	2.5%
Nouveau Money	27,035	200	10.0%
Post-War Suburban Pioneers	7,320	50	2.5%
Affluent Empty Nesters	2,110	20	1.0%
Blue-Collar Button-Downs	5,000	40	2.0%
Middle-American Retirees	350	0	0.0%
<i>Subtotal:</i>	48,725	360	18.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	5,470	50	2.5%
Active Retirees	390	0	0.0%
Blue-Collar Retirees	1,715	10	0.5%
<i>Subtotal:</i>	7,575	60	3.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Cobb County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	113,550	970	48.5%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	29,755	290	14.5%
Kids 'r' Us	12,915	150	7.5%
<i>Subtotal:</i>	<u>42,670</u>	<u>440</u>	<u>22.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	3,340	30	1.5%
Unibox Transferees	28,095	320	16.0%
Mainstream Families	16,410	180	9.0%
<i>Subtotal:</i>	<u>47,845</u>	<u>530</u>	<u>26.5%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	7,745	0	0.0%
Full-Nest Exurbanites	8,565	0	0.0%
New-Town Families	2,355	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	4,370	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>23,035</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Cobb County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	49,160	610	30.5%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	4,760	60	3.0%
Fast-Track Professionals	7,345	90	4.5%
Suburban Achievers	10,450	120	6.0%
Generation X	5,205	70	3.5%
<i>Subtotal:</i>	<u>27,760</u>	<u>340</u>	<u>17.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	20,670	260	13.0%
University/College Affiliates	730	10	0.5%
<i>Subtotal:</i>	<u>21,400</u>	<u>270</u>	<u>13.5%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Gwinnett County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	26,870	180	13.8%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	21,965	140	10.8%
<i>Small Cities/Edge Cities</i>	4,905	40	3.1%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	130,470	560	43.1%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	29,485	260	20.0%
<i>Small Cities/Edge Cities</i>	29,475	290	22.3%
<i>Town & Country/Exurbs</i>	70,600	0	0.0%
<i>Agrarian/Rural</i>	910	10	0.8%
Younger Singles & Couples	52,460	560	43.1%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	49,085	520	40.0%
<i>Small Cities/Edge Cities</i>	3,375	40	3.1%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	209,800	1,300	100.0%
Total County Households:	216,465		
Classified Households As A Share Of Total County Households:	96.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Gwinnett County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	26,870	180	13.8%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	2,175	10	0.8%
Nouveau Money	11,465	80	6.2%
Post-War Suburban Pioneers	4,025	20	1.5%
Affluent Empty Nesters	2,685	20	1.5%
Blue-Collar Button-Downs	635	0	0.0%
Middle-American Retirees	980	10	0.8%
<i>Subtotal:</i>	21,965	140	10.8%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	3,490	30	2.3%
Active Retirees	280	0	0.0%
Blue-Collar Retirees	1,135	10	0.8%
<i>Subtotal:</i>	4,905	40	3.1%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Gwinnett County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	130,470	560	43.1%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	25,735	220	16.9%
Kids 'r' Us	3,750	40	3.1%
<i>Subtotal:</i>	<u>29,485</u>	<u>260</u>	<u>20.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	995	10	0.8%
Unibox Transferees	24,725	250	19.2%
Mainstream Families	3,755	30	2.3%
<i>Subtotal:</i>	<u>29,475</u>	<u>290</u>	<u>22.3%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	2,885	0	0.0%
Full-Nest Exurbanites	47,215	0	0.0%
New-Town Families	12,825	0	0.0%
Pillars of the Community	465	0	0.0%
Middle-American Families	7,210	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>70,600</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	910	10	0.8%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>910</u>	<u>10</u>	<u>0.8%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Gwinnett County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	52,460	560	43.1%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	4,540	50	3.8%
Fast-Track Professionals	14,400	150	11.5%
Suburban Achievers	18,770	180	13.8%
Generation X	11,375	140	10.8%
<i>Subtotal:</i>	<u>49,085</u>	<u>520</u>	<u>40.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	3,375	40	3.1%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>3,375</u>	<u>40</u>	<u>3.1%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Clayton County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	10,965	120	13.3%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	4,390	50	5.6%
<i>Small Cities/Edge Cities</i>	6,575	70	7.8%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	48,795	610	67.8%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	5,200	80	8.9%
<i>Small Cities/Edge Cities</i>	35,465	530	58.9%
<i>Town & Country/Exurbs</i>	8,130	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	9,230	170	18.9%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	8,445	160	17.8%
<i>Small Cities/Edge Cities</i>	785	10	1.1%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	68,990	900	100.0%
Total County Households:	85,325		
Classified Households As A Share Of Total County Households:	80.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Clayton County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	10,965	120	13.3%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	945	10	1.1%
Affluent Empty Nesters	1,510	20	2.2%
Blue-Collar Button-Downs	1,935	20	2.2%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	4,390	50	5.6%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	1,805	20	2.2%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	4,770	50	5.6%
<i>Subtotal:</i>	6,575	70	7.8%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Clayton County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	48,795	610	67.8%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	1,605	20	2.2%
Kids 'r' Us	3,595	60	6.7%
<i>Subtotal:</i>	<u>5,200</u>	<u>80</u>	<u>8.9%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	1,280	10	1.1%
Unibox Transferees	8,590	140	15.6%
Mainstream Families	25,595	380	42.2%
<i>Subtotal:</i>	<u>35,465</u>	<u>530</u>	<u>58.9%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	1,900	0	0.0%
Full-Nest Exurbanites	3,550	0	0.0%
New-Town Families	885	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	1,795	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>8,130</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Clayton County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	9,230	170	18.9%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	2,605	40	4.4%
Generation X	5,840	120	13.3%
<i>Subtotal:</i>	<u>8,445</u>	<u>160</u>	<u>17.8%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	785	10	1.1%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>785</u>	<u>10</u>	<u>1.1%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Forsyth County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	23,700	180	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	22,390	180	100.0%
<i>Agrarian/Rural</i>	1,310	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	23,700	180	100.0%
Total County Households:	38,685		
Classified Households As A Share Of Total County Households:	61.3%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Forsyth County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Forsyth County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	23,700	180	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	900	10	5.6%
Full-Nest Exurbanites	2,200	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	19,290	170	94.4%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>22,390</u>	<u>180</u>	<u>100.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,310	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>1,310</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Forsyth County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 1 Through 4
Cobb, Gwinnett, Clayton and Forsyth Counties, Georgia

<u>Household Type/ Geographic Designation</u>	<u>Cobb County</u>	<u>Gwinnett County</u>	<u>Clayton County</u>	<u>Forsyth County</u>	<u>Total</u>
Empty Nesters & Retirees	420	180	120	0	720
<i>Metropolitan Cities</i>	0	0	0	0	0
<i>Metropolitan Suburbs</i>	360	140	50	0	550
<i>Small Cities/Edge Cities</i>	60	40	70	0	170
<i>Town & Country/Exurbs</i>	0	0	0	0	0
Traditional & Non-Traditional Families	970	560	610	180	2,320
<i>Metropolitan Cities</i>	0	0	0	0	0
<i>Metropolitan Suburbs</i>	440	260	80	0	780
<i>Small Cities/Edge Cities</i>	530	290	530	0	1,350
<i>Town & Country/Exurbs</i>	0	0	0	180	180
<i>Agrarian/Rural</i>	0	10	0	0	10
Younger Singles & Couples	610	560	170	0	1,340
<i>Metropolitan Cities</i>	0	0	0	0	0
<i>Metropolitan Suburbs</i>	340	520	160	0	1,020
<i>Small Cities/Edge Cities</i>	270	40	10	0	320
<i>Agrarian/Rural</i>	0	0	0	0	0
Total:	2,000	1,300	900	180	4,380
Percent:	45.7%	29.7%	20.5%	4.1%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 1 Through 4
Cobb, Gwinnett, Clayton and Forsyth Counties, Georgia

	<u>Cobb County</u>	<u>Gwinnett County</u>	<u>Clayton County</u>	<u>Forsyth County</u>	<u>Total</u>
Empty Nesters & Retirees	420	180	120	0	720
<i>Metropolitan Cities</i>					
Urban Establishment	0	0	0	0	0
Rowhouse Retirees	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>					
The Social Register	50	10	0	0	60
Nouveau Money	200	80	0	0	280
Post-War Suburban Pioneers	50	20	10	0	80
Affluent Empty Nesters	20	20	20	0	60
Blue-Collar Button-Downs	40	0	20	0	60
Middle-American Retirees	0	10	0	0	10
Subtotal:	<u>360</u>	<u>140</u>	<u>50</u>	<u>0</u>	<u>550</u>
<i>Small Cities/Edge Cities</i>					
Middle-Class Move-Downs	50	30	20	0	100
Active Retirees	0	0	0	0	0
Blue-Collar Retirees	10	10	50	0	70
Subtotal:	<u>60</u>	<u>40</u>	<u>70</u>	<u>0</u>	<u>170</u>
<i>Town & Country/Exurbs</i>					
Mainstream Retirees	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 1 Through 4
Cobb, Gwinnett, Clayton and Forsyth Counties, Georgia

	<u>Cobb County</u>	<u>Gwinnett County</u>	<u>Clayton County</u>	<u>Forsyth County</u>	<u>Total</u>
Traditional & Non-Traditional Families	970	560	610	180	2,320
<i>Metropolitan Cities</i>					
Full-Nest Urbanites	0	0	0	0	0
Multi-Cultural Families	0	0	0	0	0
Black Urban Families	0	0	0	0	0
Latino Urban Families	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>					
Full-Nest Suburbanites	290	220	20	0	530
Kids 'r' Us	150	40	60	0	250
<i>Subtotal:</i>	<u>440</u>	<u>260</u>	<u>80</u>	<u>0</u>	<u>780</u>
<i>Small Cities/Edge Cities</i>					
Cosmopolitan Families	30	10	10	0	50
Unibox Transferees	320	250	140	0	710
Mainstream Families	180	30	380	0	590
<i>Subtotal:</i>	<u>530</u>	<u>290</u>	<u>530</u>	<u>0</u>	<u>1,350</u>
<i>Town & Country/Exurbs</i>					
Exurban Elite	0	0	0	10	10
Full-Nest Exurbanites	0	0	0	0	0
New-Town Families	0	0	0	0	0
Pillars of the Community	0	0	0	0	0
Middle-American Families	0	0	0	170	170
Young Homesteaders	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>180</u>	<u>180</u>
<i>Agrarian/Rural</i>					
Heartland Families	0	10	0	0	10
Small-Town Families	0	0	0	0	0
Rustic Families	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>0</u>	<u>0</u>	<u>10</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 1 Through 4
Cobb, Gwinnett, Clayton and Forsyth Counties, Georgia

	<u>Cobb County</u>	<u>Gwinnett County</u>	<u>Clayton County</u>	<u>Forsyth County</u>	<u>Total</u>
Younger Singles & Couples	610	560	170	0	1,340
<i>Metropolitan Cities</i>					
Urban Elite	0	0	0	0	0
e-Types	0	0	0	0	0
Urban Achievers	0	0	0	0	0
New Bohemians	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>					
The VIPs	60	50	0	0	110
Fast-Track Professionals	90	150	0	0	240
Suburban Achievers	120	180	40	0	340
Generation X	70	140	120	0	330
Subtotal:	<u>340</u>	<u>520</u>	<u>160</u>	<u>0</u>	<u>1,020</u>
<i>Small Cities/Edge Cities</i>					
Twentysomethings	260	40	10	0	310
University/College Affiliates	10	0	0	0	10
Subtotal:	<u>270</u>	<u>40</u>	<u>10</u>	<u>0</u>	<u>320</u>
<i>Agrarian/Rural</i>					
PC Pioneers	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Cherokee County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	2,315	10	4.2%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	1,945	10	4.2%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	370	0	0.0%
Traditional & Non-Traditional Families	40,950	190	79.2%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	11,850	100	41.7%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	22,310	80	33.3%
<i>Agrarian/Rural</i>	6,790	10	4.2%
Younger Singles & Couples	3,255	40	16.7%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	3,255	40	16.7%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	46,520	240	100.0%
Total County Households:	53,455		
Classified Households As A Share Of Total County Households:	87.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Cherokee County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	2,315	10	4.2%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	330	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	435	0	0.0%
Blue-Collar Button-Downs	1,180	10	4.2%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	1,945	10	4.2%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	370	0	0.0%
<i>Subtotal:</i>	370	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Cherokee County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	40,950	190	79.2%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	11,225	90	37.5%
Kids 'r' Us	625	10	4.2%
<i>Subtotal:</i>	<u>11,850</u>	<u>100</u>	<u>41.7%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	11,040	0	0.0%
New-Town Families	1,580	10	4.2%
Pillars of the Community	0	0	0.0%
Middle-American Families	9,690	70	29.2%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>22,310</u>	<u>80</u>	<u>33.3%</u>
<i>Agrarian/Rural</i>			
Heartland Families	3,040	0	0.0%
Small-Town Families	1,365	10	4.2%
Rustic Families	2,385	0	0.0%
<i>Subtotal:</i>	<u>6,790</u>	<u>10</u>	<u>4.2%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Cherokee County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	3,255	40	16.7%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	1,610	20	8.3%
Fast-Track Professionals	915	10	4.2%
Suburban Achievers	730	10	4.2%
Generation X	0	0	0.0%
Subtotal:	<u>3,255</u>	<u>40</u>	<u>16.7%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Fayette County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	32,965	100	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	31,915	100	100.0%
<i>Agrarian/Rural</i>	1,050	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	32,965	100	100.0%
Total County Households:	33,485		
Classified Households As A Share Of Total County Households:	98.4%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Fayette County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Fayette County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	32,965	100	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	8,120	0	0.0%
Full-Nest Exurbanites	18,695	80	80.0%
New-Town Families	4,090	20	20.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	1,010	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>31,915</u>	<u>100</u>	<u>100.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,050	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>1,050</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Fayette County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Douglas County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	280	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	280	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	24,895	100	76.9%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	21,900	100	76.9%
<i>Agrarian/Rural</i>	2,995	0	0.0%
Younger Singles & Couples	4,270	30	23.1%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	4,270	30	23.1%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	29,445	130	100.0%
Total County Households:	34,395		
Classified Households As A Share Of Total County Households:	85.6%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Douglas County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	280	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	280	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	280	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Douglas County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	24,895	100	76.9%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	7,480	40	30.8%
New-Town Families	0	0	0.0%
Pillars of the Community	7,540	40	30.8%
Middle-American Families	5,055	20	15.4%
Young Homesteaders	1,825	0	0.0%
<i>Subtotal:</i>	<u>21,900</u>	<u>100</u>	<u>76.9%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,910	0	0.0%
Small-Town Families	735	0	0.0%
Rustic Families	350	0	0.0%
<i>Subtotal:</i>	<u>2,995</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Douglas County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	4,270	30	23.1%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	1,210	10	7.7%
Generation X	3,060	20	15.4%
<i>Subtotal:</i>	<u>4,270</u>	<u>30</u>	<u>23.1%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Coweta County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	23,270	70	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	12,850	60	85.7%
<i>Agrarian/Rural</i>	10,420	10	14.3%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	23,270	70	100.0%
Total County Households:	33,845		
Classified Households As A Share Of Total County Households:	68.8%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Coweta County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Coweta County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	23,270	70	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	6,900	40	57.1%
New-Town Families	0	0	0.0%
Pillars of the Community	4,160	20	28.6%
Middle-American Families	0	0	0.0%
Young Homesteaders	1,790	0	0.0%
<i>Subtotal:</i>	<u>12,850</u>	<u>60</u>	<u>85.7%</u>
<i>Agrarian/Rural</i>			
Heartland Families	4,420	0	0.0%
Small-Town Families	1,805	10	14.3%
Rustic Families	4,195	0	0.0%
<i>Subtotal:</i>	<u>10,420</u>	<u>10</u>	<u>14.3%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Coweta County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Henry County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	33,590	50	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	22,485	50	100.0%
<i>Agrarian/Rural</i>	11,105	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	33,590	50	100.0%
Total County Households:	45,925		
Classified Households As A Share Of Total County Households:	73.1%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Henry County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Henry County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	33,590	50	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	7,360	20	40.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	15,125	30	60.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>22,485</u>	<u>50</u>	<u>100.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	6,780	0	0.0%
Small-Town Families	3,425	0	0.0%
Rustic Families	900	0	0.0%
<i>Subtotal:</i>	<u>11,105</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Henry County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 6 Through 10

Cherokee, Fayette, Douglas, Coweta and Henry Counties, Georgia

<u>Household Type/ Geographic Designation</u>	<u>Cherokee County</u>	<u>Fayette County</u>	<u>Douglas County</u>	<u>Coweta County</u>	<u>Henry County</u>	<u>Total</u>
Empty Nesters & Retirees	10	0	0	0	0	10
<i>Metropolitan Cities</i>	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	10	0	0	0	0	10
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	190	100	100	70	50	510
<i>Metropolitan Cities</i>	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	100	0	0	0	0	100
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0
<i>Town & Country/Exurbs</i>	80	100	100	60	50	390
<i>Agrarian/Rural</i>	10	0	0	10	0	20
Younger Singles & Couples	40	0	30	0	0	70
<i>Metropolitan Cities</i>	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	40	0	30	0	0	70
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Total:	240	100	130	70	50	590
Percent:	40.7%	16.9%	22.0%	11.9%	8.5%	100%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 6 Through 10

Cherokee, Fayette, Douglas, Coweta and Henry Counties, Georgia

	<u>Cherokee County</u>	<u>Fayette County</u>	<u>Douglas County</u>	<u>Coweta County</u>	<u>Henry County</u>	<u>Total</u>
Empty Nesters & Retirees	10	0	0	0	0	10
<i>Metropolitan Cities</i>						
Urban Establishment	0	0	0	0	0	0
Rowhouse Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>						
The Social Register	0	0	0	0	0	0
Nouveau Money	0	0	0	0	0	0
Post-War Suburban Pioneers	0	0	0	0	0	0
Affluent Empty Nesters	0	0	0	0	0	0
Blue-Collar Button-Downs	10	0	0	0	0	10
Middle-American Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>10</u>
<i>Small Cities/Edge Cities</i>						
Middle-Class Move-Downs	0	0	0	0	0	0
Active Retirees	0	0	0	0	0	0
Blue-Collar Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Town & Country/Exurbs</i>						
Mainstream Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 6 Through 10

Cherokee, Fayette, Douglas, Coweta and Henry Counties, Georgia

	<u>Cherokee County</u>	<u>Fayette County</u>	<u>Douglas County</u>	<u>Coweta County</u>	<u>Henry County</u>	<u>Total</u>
Traditional & Non-Traditional Families	190	100	100	70	50	510
<i>Metropolitan Cities</i>						
Full-Nest Urbanites	0	0	0	0	0	0
Multi-Cultural Families	0	0	0	0	0	0
Black Urban Families	0	0	0	0	0	0
Latino Urban Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>						
Full-Nest Suburbanites	90	0	0	0	0	90
Kids 'r' Us	10	0	0	0	0	10
<i>Subtotal:</i>	<u>100</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>100</u>
<i>Small Cities/Edge Cities</i>						
Cosmopolitan Families	0	0	0	0	0	0
Unibox Transferees	0	0	0	0	0	0
Mainstream Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Town & Country/Exurbs</i>						
Exurban Elite	0	0	0	0	0	0
Full-Nest Exurbanites	0	80	40	40	20	180
New-Town Families	10	20	0	0	0	30
Pillars of the Community	0	0	40	20	0	60
Middle-American Families	70	0	20	0	30	120
Young Homesteaders	0	0	0	0	0	0
<i>Subtotal:</i>	<u>80</u>	<u>100</u>	<u>100</u>	<u>60</u>	<u>50</u>	<u>390</u>
<i>Agrarian/Rural</i>						
Heartland Families	0	0	0	0	0	0
Small-Town Families	10	0	0	10	0	20
Rustic Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>10</u>	<u>0</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>20</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 6 Through 10

Cherokee, Fayette, Douglas, Coweta and Henry Counties, Georgia

	<u>Cherokee County</u>	<u>Fayette County</u>	<u>Douglas County</u>	<u>Coweta County</u>	<u>Henry County</u>	<u>Total</u>
Younger Singles & Couples	40	0	30	0	0	70
<i>Metropolitan Cities</i>						
Urban Elite	0	0	0	0	0	0
e-Types	0	0	0	0	0	0
Urban Achievers	0	0	0	0	0	0
New Bohemians	0	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>						
The VIPs	20	0	0	0	0	20
Fast-Track Professionals	10	0	0	0	0	10
Suburban Achievers	10	0	10	0	0	20
Generation X	0	0	20	0	0	20
Subtotal:	<u>40</u>	<u>0</u>	<u>30</u>	<u>0</u>	<u>0</u>	<u>70</u>
<i>Small Cities/Edge Cities</i>						
Twentysomethings	0	0	0	0	0	0
University/College Affiliates	0	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>						
PC Pioneers	0	0	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Clarke County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	14,480	30	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	14,110	30	100.0%
<i>Agrarian/Rural</i>	370	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	14,480	30	100.0%
Total County Households:	40,750		
Classified Households As A Share Of Total County Households:	35.5%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Clarke County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Clarke County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	14,480	30	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	7,360	20	66.7%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	6,750	10	33.3%
<i>Subtotal:</i>	<u>14,110</u>	<u>30</u>	<u>100.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	370	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>370</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Clarke County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Muscookee County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	17,410	30	50.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	2,135	0	0.0%
<i>Small Cities/Edge Cities</i>	15,275	30	50.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	22,675	20	33.3%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	2,170	0	0.0%
<i>Small Cities/Edge Cities</i>	10,160	20	33.3%
<i>Town & Country/Exurbs</i>	10,345	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	2,885	10	16.7%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	2,885	10	16.7%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	42,970	60	100.0%
Total County Households:	70,145		
Classified Households As A Share Of Total County Households:	61.3%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Muscooke County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	17,410	30	50.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	1,540	0	0.0%
Blue-Collar Button-Downs	595	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	2,135	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	5,030	10	16.7%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	10,245	20	33.3%
<i>Subtotal:</i>	15,275	30	50.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Muscooke County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	22,675	20	33.3%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	2,170	0	0.0%
<i>Subtotal:</i>	<u>2,170</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	2,805	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	7,355	20	33.3%
<i>Subtotal:</i>	<u>10,160</u>	<u>20</u>	<u>33.3%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	1,330	0	0.0%
Full-Nest Exurbanites	2,040	0	0.0%
New-Town Families	2,245	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	4,730	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>10,345</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Muscogee County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	2,885	10	16.7%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	2,885	10	16.7%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>2,885</u>	<u>10</u>	<u>16.7%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Chatham County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	14,025	30	42.9%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	4,565	10	14.3%
<i>Small Cities/Edge Cities</i>	9,105	20	28.6%
<i>Town & Country/Exurbs</i>	355	0	0.0%
Traditional & Non-Traditional Families	33,075	10	14.3%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	1,175	0	0.0%
<i>Small Cities/Edge Cities</i>	6,260	10	14.3%
<i>Town & Country/Exurbs</i>	20,240	0	0.0%
<i>Agrarian/Rural</i>	5,400	0	0.0%
Younger Singles & Couples	10,875	30	42.9%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	7,450	20	28.6%
<i>Small Cities/Edge Cities</i>	2,975	10	14.3%
<i>Agrarian/Rural</i>	450	0	0.0%
Total:	57,975	70	100.0%
Total County Households:	91,315		
Classified Households As A Share Of Total County Households:	63.5%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Chatham County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	14,025	30	42.9%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	875	0	0.0%
Affluent Empty Nesters	2,510	10	14.3%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	1,180	0	0.0%
<i>Subtotal:</i>	4,565	10	14.3%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	2,345	10	14.3%
Active Retirees	1,110	0	0.0%
Blue-Collar Retirees	5,650	10	14.3%
<i>Subtotal:</i>	9,105	20	28.6%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	355	0	0.0%
<i>Subtotal:</i>	355	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Chatham County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	33,075	10	14.3%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	1,175	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	1,175	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	2,535	0	0.0%
Unibox Transferees	1,030	0	0.0%
Mainstream Families	2,695	10	14.3%
<i>Subtotal:</i>	6,260	10	14.3%
<i>Town & Country/Exurbs</i>			
Exurban Elite	4,470	0	0.0%
Full-Nest Exurbanites	3,575	0	0.0%
New-Town Families	4,220	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	7,975	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	20,240	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	3,810	0	0.0%
Small-Town Families	230	0	0.0%
Rustic Families	1,360	0	0.0%
<i>Subtotal:</i>	5,400	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Chatham County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	10,875	30	42.9%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	830	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	2,780	10	14.3%
Generation X	3,840	10	14.3%
<i>Subtotal:</i>	<u>7,450</u>	<u>20</u>	<u>28.6%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	2,630	10	14.3%
University/College Affiliates	345	0	0.0%
<i>Subtotal:</i>	<u>2,975</u>	<u>10</u>	<u>14.3%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	450	0	0.0%
<i>Subtotal:</i>	<u>450</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Bibb County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	7,030	20	40.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	7,030	20	40.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	25,725	30	60.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	8,420	30	60.0%
<i>Town & Country/Exurbs</i>	16,885	0	0.0%
<i>Agrarian/Rural</i>	420	0	0.0%
Younger Singles & Couples	1,655	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	1,655	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	34,410	50	100.0%
Total County Households:	59,755		
Classified Households As A Share Of Total County Households:	57.6%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Bibb County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	7,030	20	40.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	3,805	10	20.0%
Active Retirees	305	0	0.0%
Blue-Collar Retirees	2,920	10	20.0%
<i>Subtotal:</i>	7,030	20	40.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Bibb County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	25,725	30	60.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	2,890	10	20.0%
Unibox Transferees	1,400	10	20.0%
Mainstream Families	4,130	10	20.0%
<i>Subtotal:</i>	8,420	30	60.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	3,520	0	0.0%
Full-Nest Exurbanites	3,290	0	0.0%
New-Town Families	3,050	0	0.0%
Pillars of the Community	1,495	0	0.0%
Middle-American Families	4,570	0	0.0%
Young Homesteaders	960	0	0.0%
<i>Subtotal:</i>	16,885	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	420	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	420	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Bibb County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	1,655	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	850	0	0.0%
University/College Affiliates	805	0	0.0%
Subtotal:	<u>1,655</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Hall County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	2,440	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	2,440	0	0.0%
Traditional & Non-Traditional Families	32,365	40	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	23,245	40	100.0%
<i>Agrarian/Rural</i>	9,120	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	34,805	40	100.0%
Total County Households:	50,225		
Classified Households As A Share Of Total County Households:	69.3%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Hall County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	2,440	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	2,440	0	0.0%
<i>Subtotal:</i>	2,440	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Hall County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	32,365	40	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	425	0	0.0%
Full-Nest Exurbanites	3,895	0	0.0%
New-Town Families	1,400	0	0.0%
Pillars of the Community	6,465	20	50.0%
Middle-American Families	6,245	20	50.0%
Young Homesteaders	4,815	0	0.0%
Subtotal:	23,245	40	100.0%
<i>Agrarian/Rural</i>			
Heartland Families	395	0	0.0%
Small-Town Families	2,580	0	0.0%
Rustic Families	6,145	0	0.0%
Subtotal:	9,120	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Hall County, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Rockdale County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	19,530	50	100.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	19,530	50	100.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	19,530	50	100.0%
Total County Households:	24,890		
Classified Households As A Share Of Total County Households:	78.5%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Rockdale County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	0	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Rockdale County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	19,530	50	100.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	8,825	0	0.0%
New-Town Families	1,390	10	20.0%
Pillars of the Community	4,910	40	80.0%
Middle-American Families	2,410	0	0.0%
Young Homesteaders	1,995	0	0.0%
<i>Subtotal:</i>	<u>19,530</u>	<u>50</u>	<u>100.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Rockdale County, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	0	0	0.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 12 Through 17

Clarke, Muscogee, Chatham, Bibb, Hall and Rockdale Counties, Georgia

<u>Household Type/ Geographic Designation</u>	<u>Clarke County</u>	<u>Muscogee County</u>	<u>Chatham County</u>	<u>Bibb County</u>	<u>Hall County</u>	<u>Rockdale County</u>	<u>Total</u>
Empty Nesters & Retirees	0	30	30	20	0	0	80
<i>Metropolitan Cities</i>	0	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	0	0	10	0	0	0	10
<i>Small Cities/Edge Cities</i>	0	30	20	20	0	0	70
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0	0
Traditional & Non-Traditional Families	30	20	10	30	40	50	180
<i>Metropolitan Cities</i>	0	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	0	0	0	0	0	0	0
<i>Small Cities/Edge Cities</i>	0	20	10	30	0	0	60
<i>Town & Country/Exurbs</i>	30	0	0	0	40	50	120
<i>Agrarian/Rural</i>	0	0	0	0	0	0	0
Younger Singles & Couples	0	10	30	0	0	0	40
<i>Metropolitan Cities</i>	0	0	0	0	0	0	0
<i>Metropolitan Suburbs</i>	0	0	20	0	0	0	20
<i>Small Cities/Edge Cities</i>	0	10	10	0	0	0	20
<i>Agrarian/Rural</i>	0	0	0	0	0	0	0
Total:	30	60	70	50	40	50	300
Percent:	10.0%	20.0%	23.3%	16.7%	13.3%	16.7%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 12 Through 17

Clarke, Muscogee, Chatham, Bibb, Hall and Rockdale Counties, Georgia

	<u>Clarke County</u>	<u>Muscogee County</u>	<u>Chatham County</u>	<u>Bibb County</u>	<u>Hall County</u>	<u>Rockdale County</u>	<u>Total</u>
Empty Nesters & Retirees	0	30	30	20	0	0	80
<i>Metropolitan Cities</i>							
Urban Establishment	0	0	0	0	0	0	0
Rowhouse Retirees	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>							
The Social Register	0	0	0	0	0	0	0
Nouveau Money	0	0	0	0	0	0	0
Post-War Suburban Pioneers	0	0	0	0	0	0	0
Affluent Empty Nesters	0	0	10	0	0	0	10
Blue-Collar Button-Downs	0	0	0	0	0	0	0
Middle-American Retirees	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>10</u>
<i>Small Cities/Edge Cities</i>							
Middle-Class Move-Downs	0	10	10	10	0	0	30
Active Retirees	0	0	0	0	0	0	0
Blue-Collar Retirees	0	20	10	10	0	0	40
<i>Subtotal:</i>	<u>0</u>	<u>30</u>	<u>20</u>	<u>20</u>	<u>0</u>	<u>0</u>	<u>70</u>
<i>Town & Country/Exurbs</i>							
Mainstream Retirees	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 12 Through 17

Clarke, Muscogee, Chatham, Bibb, Hall and Rockdale Counties, Georgia

	<u>Clarke County</u>	<u>Muscogee County</u>	<u>Chatham County</u>	<u>Bibb County</u>	<u>Hall County</u>	<u>Rockdale County</u>	<u>Total</u>
Traditional & Non-Traditional Families	30	20	10	30	40	50	180
<i>Metropolitan Cities</i>							
Full-Nest Urbanites	0	0	0	0	0	0	0
Multi-Cultural Families	0	0	0	0	0	0	0
Black Urban Families	0	0	0	0	0	0	0
Latino Urban Families	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>							
Full-Nest Suburbanites	0	0	0	0	0	0	0
Kids 'r' Us	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Small Cities/Edge Cities</i>							
Cosmopolitan Families	0	0	0	10	0	0	10
Unibox Transferees	0	0	0	10	0	0	10
Mainstream Families	0	20	10	10	0	0	40
<i>Subtotal:</i>	<u>0</u>	<u>20</u>	<u>10</u>	<u>30</u>	<u>0</u>	<u>0</u>	<u>60</u>
<i>Town & Country/Exurbs</i>							
Exurban Elite	0	0	0	0	0	0	0
Full-Nest Exurbanites	20	0	0	0	0	0	20
New-Town Families	0	0	0	0	0	10	10
Pillars of the Community	0	0	0	0	20	40	60
Middle-American Families	0	0	0	0	20	0	20
Young Homesteaders	10	0	0	0	0	0	10
<i>Subtotal:</i>	<u>30</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>40</u>	<u>50</u>	<u>120</u>
<i>Agrarian/Rural</i>							
Heartland Families	0	0	0	0	0	0	0
Small-Town Families	0	0	0	0	0	0	0
Rustic Families	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 12 Through 17

Clarke, Muscogee, Chatham, Bibb, Hall and Rockdale Counties, Georgia

	<u>Clarke County</u>	<u>Muscogee County</u>	<u>Chatham County</u>	<u>Bibb County</u>	<u>Hall County</u>	<u>Rockdale County</u>	<u>Total</u>
Younger Singles & Couples	0	10	30	0	0	0	40
<i>Metropolitan Cities</i>							
Urban Elite	0	0	0	0	0	0	0
e-Types	0	0	0	0	0	0	0
Urban Achievers	0	0	0	0	0	0	0
New Bohemians	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>							
The VIPs	0	0	0	0	0	0	0
Fast-Track Professionals	0	0	0	0	0	0	0
Suburban Achievers	0	0	10	0	0	0	10
Generation X	0	0	10	0	0	0	10
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>20</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>20</u>
<i>Small Cities/Edge Cities</i>							
Twentysomethings	0	10	10	0	0	0	20
University/College Affiliates	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>20</u>
<i>Agrarian/Rural</i>							
PC Pioneers	0	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Broward County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	184,965	40	36.4%
<i>Metropolitan Cities</i>	16,995	0	0.0%
<i>Metropolitan Suburbs</i>	78,840	20	18.2%
<i>Small Cities/Edge Cities</i>	89,130	20	18.2%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	160,320	30	27.3%
<i>Metropolitan Cities</i>	86,025	10	9.1%
<i>Metropolitan Suburbs</i>	56,040	20	18.2%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	18,255	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	135,940	40	36.4%
<i>Metropolitan Cities</i>	87,900	20	18.2%
<i>Metropolitan Suburbs</i>	48,040	20	18.2%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	481,225	110	100.0%
Total County Households:	672,530		
Classified Households As A Share Of Total County Households:	71.6%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Broward County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	184,965	40	36.4%
<i>Metropolitan Cities</i>			
Urban Establishment	6,735	0	0.0%
Rowhouse Retirees	10,260	0	0.0%
<i>Subtotal:</i>	16,995	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	7,365	0	0.0%
Post-War Suburban Pioneers	4,365	0	0.0%
Affluent Empty Nesters	25,230	10	9.1%
Blue-Collar Button-Downs	8,010	0	0.0%
Middle-American Retirees	33,870	10	9.1%
<i>Subtotal:</i>	78,840	20	18.2%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	89,130	20	18.2%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	89,130	20	18.2%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Broward County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	160,320	30	27.3%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	21,945	0	0.0%
Multi-Cultural Families	19,345	0	0.0%
Black Urban Families	37,535	10	9.1%
Latino Urban Families	7,200	0	0.0%
Subtotal:	86,025	10	9.1%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	31,700	10	9.1%
Kids 'r' Us	24,340	10	9.1%
Subtotal:	56,040	20	18.2%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	18,255	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	0	0	0.0%
Subtotal:	18,255	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
Subtotal:	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Broward County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	135,940	40	36.4%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	5,935	0	0.0%
Urban Achievers	56,005	10	9.1%
New Bohemians	25,960	10	9.1%
<i>Subtotal:</i>	<u>87,900</u>	<u>20</u>	<u>18.2%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	7,320	0	0.0%
Fast-Track Professionals	14,740	10	9.1%
Suburban Achievers	21,790	10	9.1%
Generation X	4,190	0	0.0%
<i>Subtotal:</i>	<u>48,040</u>	<u>20</u>	<u>18.2%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Miami-Dade County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	133,300	10	11.1%
<i>Metropolitan Cities</i>	13,370	0	0.0%
<i>Metropolitan Suburbs</i>	90,410	0	0.0%
<i>Small Cities/Edge Cities</i>	29,120	10	11.1%
<i>Town & Country/Exurbs</i>	400	0	0.0%
Traditional & Non-Traditional Families	203,115	40	44.4%
<i>Metropolitan Cities</i>	130,690	20	22.2%
<i>Metropolitan Suburbs</i>	60,050	20	22.2%
<i>Small Cities/Edge Cities</i>	5,890	0	0.0%
<i>Town & Country/Exurbs</i>	5,345	0	0.0%
<i>Agrarian/Rural</i>	1,140	0	0.0%
Younger Singles & Couples	118,980	40	44.4%
<i>Metropolitan Cities</i>	62,465	20	22.2%
<i>Metropolitan Suburbs</i>	55,740	20	22.2%
<i>Small Cities/Edge Cities</i>	775	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	455,395	90	100.0%
Total County Households:	788,590		
Classified Households As A Share Of Total County Households:	57.7%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Miami-Dade County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	133,300	10	11.1%
<i>Metropolitan Cities</i>			
Urban Establishment	10,660	0	0.0%
Rowhouse Retirees	2,710	0	0.0%
<i>Subtotal:</i>	13,370	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	12,275	0	0.0%
Nouveau Money	8,575	0	0.0%
Post-War Suburban Pioneers	12,050	0	0.0%
Affluent Empty Nesters	24,585	0	0.0%
Blue-Collar Button-Downs	18,115	0	0.0%
Middle-American Retirees	14,810	0	0.0%
<i>Subtotal:</i>	90,410	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	1,155	0	0.0%
Active Retirees	26,190	10	11.1%
Blue-Collar Retirees	1,775	0	0.0%
<i>Subtotal:</i>	29,120	10	11.1%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	400	0	0.0%
<i>Subtotal:</i>	400	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Miami-Dade County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	203,115	40	44.4%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	22,425	0	0.0%
Multi-Cultural Families	34,990	10	11.1%
Black Urban Families	22,895	0	0.0%
Latino Urban Families	50,380	10	11.1%
<i>Subtotal:</i>	<u>130,690</u>	<u>20</u>	<u>22.2%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	21,360	10	11.1%
Kids 'r' Us	38,690	10	11.1%
<i>Subtotal:</i>	<u>60,050</u>	<u>20</u>	<u>22.2%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	1,630	0	0.0%
Mainstream Families	4,260	0	0.0%
<i>Subtotal:</i>	<u>5,890</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	1,215	0	0.0%
New-Town Families	980	0	0.0%
Pillars of the Community	2,000	0	0.0%
Middle-American Families	1,130	0	0.0%
Young Homesteaders	20	0	0.0%
<i>Subtotal:</i>	<u>5,345</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	610	0	0.0%
Small-Town Families	530	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>1,140</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Miami-Dade County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	118,980	40	44.4%
<i>Metropolitan Cities</i>			
Urban Elite	6,565	0	0.0%
e-Types	2,155	0	0.0%
Urban Achievers	36,715	10	11.1%
New Bohemians	17,030	10	11.1%
Subtotal:	<u>62,465</u>	<u>20</u>	<u>22.2%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	4,715	0	0.0%
Fast-Track Professionals	22,775	10	11.1%
Suburban Achievers	12,140	0	0.0%
Generation X	16,110	10	11.1%
Subtotal:	<u>55,740</u>	<u>20</u>	<u>22.2%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	775	0	0.0%
Subtotal:	<u>775</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Palm Beach County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	233,245	60	66.7%
<i>Metropolitan Cities</i>	4,395	0	0.0%
<i>Metropolitan Suburbs</i>	117,695	30	33.3%
<i>Small Cities/Edge Cities</i>	111,155	30	33.3%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	107,995	20	22.2%
<i>Metropolitan Cities</i>	25,565	10	11.1%
<i>Metropolitan Suburbs</i>	27,835	10	11.1%
<i>Small Cities/Edge Cities</i>	9,845	0	0.0%
<i>Town & Country/Exurbs</i>	42,820	0	0.0%
<i>Agrarian/Rural</i>	1,930	0	0.0%
Younger Singles & Couples	49,275	10	11.1%
<i>Metropolitan Cities</i>	11,135	0	0.0%
<i>Metropolitan Suburbs</i>	38,140	10	11.1%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	390,515	90	100.0%
Total County Households:	494,105		
Classified Households As A Share Of Total County Households:	79.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Palm Beach County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	233,245	60	66.7%
<i>Metropolitan Cities</i>			
Urban Establishment	2,865	0	0.0%
Rowhouse Retirees	1,530	0	0.0%
<i>Subtotal:</i>	4,395	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	2,365	0	0.0%
Nouveau Money	33,360	10	11.1%
Post-War Suburban Pioneers	20,385	0	0.0%
Affluent Empty Nesters	35,260	10	11.1%
Blue-Collar Button-Downs	9,260	0	0.0%
Middle-American Retirees	17,065	10	11.1%
<i>Subtotal:</i>	117,695	30	33.3%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	3,600	0	0.0%
Active Retirees	100,155	30	33.3%
Blue-Collar Retirees	7,400	0	0.0%
<i>Subtotal:</i>	111,155	30	33.3%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Palm Beach County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	107,995	20	22.2%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	2,265	0	0.0%
Multi-Cultural Families	5,910	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	17,390	10	11.1%
<i>Subtotal:</i>	25,565	10	11.1%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	15,250	10	11.1%
Kids 'r' Us	12,585	0	0.0%
<i>Subtotal:</i>	27,835	10	11.1%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	6,665	0	0.0%
Unibox Transferees	1,315	0	0.0%
Mainstream Families	1,865	0	0.0%
<i>Subtotal:</i>	9,845	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	13,710	0	0.0%
Full-Nest Exurbanites	22,210	0	0.0%
New-Town Families	5,065	0	0.0%
Pillars of the Community	1,555	0	0.0%
Middle-American Families	280	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	42,820	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	1,930	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	1,930	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Palm Beach County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	49,275	10	11.1%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	955	0	0.0%
Urban Achievers	3,685	0	0.0%
New Bohemians	6,495	0	0.0%
<i>Subtotal:</i>	<u>11,135</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	1,500	0	0.0%
Fast-Track Professionals	16,220	10	11.1%
Suburban Achievers	12,340	0	0.0%
Generation X	8,080	0	0.0%
<i>Subtotal:</i>	<u>38,140</u>	<u>10</u>	<u>11.1%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In The Miami Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 19 through 21
Broward, Miami-Dade and Palm Beach Counties, Florida

<u>Household Type/ Geographic Designation</u>	<u>Broward County</u>	<u>Miami-Dade County</u>	<u>Palm Beach County</u>	<u>Total</u>
Empty Nesters & Retirees	40	10	60	110
<i>Metropolitan Cities</i>	0	0	0	0
<i>Metropolitan Suburbs</i>	20	0	30	50
<i>Small Cities/Edge Cities</i>	20	10	30	60
<i>Town & Country/Exurbs</i>	0	0	0	0
Traditional & Non-Traditional Families	30	40	20	90
<i>Metropolitan Cities</i>	10	20	10	40
<i>Metropolitan Suburbs</i>	20	20	10	50
<i>Small Cities/Edge Cities</i>	0	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0
Younger Singles & Couples	40	40	10	90
<i>Metropolitan Cities</i>	20	20	0	40
<i>Metropolitan Suburbs</i>	20	20	10	50
<i>Small Cities/Edge Cities</i>	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0
Total:	110	90	90	290
Percent:	37.9%	31.0%	31.0%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 19 through 21
Broward, Miami-Dade and Palm Beach Counties, Florida

	<u>Broward County</u>	<u>Miami-Dade County</u>	<u>Palm Beach County</u>	<u>Total</u>
Empty Nesters & Retirees	40	10	60	110
<i>Metropolitan Cities</i>				
Urban Establishment	0	0	0	0
Rowhouse Retirees	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>				
The Social Register	0	0	0	0
Nouveau Money	0	0	10	10
Post-War Suburban Pioneers	0	0	0	0
Affluent Empty Nesters	10	0	10	20
Blue-Collar Button-Downs	0	0	0	0
Middle-American Retirees	10	0	10	20
Subtotal:	<u>20</u>	<u>0</u>	<u>30</u>	<u>50</u>
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	0	0	0	0
Active Retirees	20	10	30	60
Blue-Collar Retirees	0	0	0	0
Subtotal:	<u>20</u>	<u>10</u>	<u>30</u>	<u>60</u>
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 19 through 21
Broward, Miami-Dade and Palm Beach Counties, Florida

	<u>Broward County</u>	<u>Miami-Dade County</u>	<u>Palm Beach County</u>	<u>Total</u>
Traditional & Non-Traditional Families	30	40	20	90
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	0	0	0	0
Multi-Cultural Families	0	10	0	10
Black Urban Families	10	0	0	10
Latino Urban Families	0	10	10	20
Subtotal:	10	20	10	40
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	10	10	10	30
Kids 'r' Us	10	10	0	20
Subtotal:	20	20	10	50
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	0	0	0	0
Unibox Transferees	0	0	0	0
Mainstream Families	0	0	0	0
Subtotal:	0	0	0	0
<i>Town & Country/Exurbs</i>				
Exurban Elite	0	0	0	0
Full-Nest Exurbanites	0	0	0	0
New-Town Families	0	0	0	0
Pillars of the Community	0	0	0	0
Middle-American Families	0	0	0	0
Young Homesteaders	0	0	0	0
Subtotal:	0	0	0	0
<i>Agrarian/Rural</i>				
Heartland Families	0	0	0	0
Small-Town Families	0	0	0	0
Rustic Families	0	0	0	0
Subtotal:	0	0	0	0

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 19 through 21
Broward, Miami-Dade and Palm Beach Counties, Florida

	<u>Broward County</u>	<u>Miami-Dade County</u>	<u>Palm Beach County</u>	<u>Total</u>
Younger Singles & Couples	40	40	10	90
<i>Metropolitan Cities</i>				
Urban Elite	0	0	0	0
e-Types	0	0	0	0
Urban Achievers	10	10	0	20
New Bohemians	10	10	0	20
Subtotal:	<u>20</u>	<u>20</u>	<u>0</u>	<u>40</u>
<i>Metropolitan Suburbs</i>				
The VIPs	0	0	0	0
Fast-Track Professionals	10	10	10	30
Suburban Achievers	10	0	0	10
Generation X	0	10	0	10
Subtotal:	<u>20</u>	<u>20</u>	<u>10</u>	<u>50</u>
<i>Small Cities/Edge Cities</i>				
Twentysomethings	0	0	0	0
University/College Affiliates	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>				
PC Pioneers	0	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Orange County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	71,315	10	11.1%
<i>Metropolitan Cities</i>	10,145	0	0.0%
<i>Metropolitan Suburbs</i>	47,065	10	11.1%
<i>Small Cities/Edge Cities</i>	10,945	0	0.0%
<i>Town & Country/Exurbs</i>	3,160	0	0.0%
Traditional & Non-Traditional Families	104,050	30	33.3%
<i>Metropolitan Cities</i>	29,585	10	11.1%
<i>Metropolitan Suburbs</i>	23,185	10	11.1%
<i>Small Cities/Edge Cities</i>	3,895	0	0.0%
<i>Town & Country/Exurbs</i>	44,170	10	11.1%
<i>Agrarian/Rural</i>	3,215	0	0.0%
Younger Singles & Couples	87,785	50	55.6%
<i>Metropolitan Cities</i>	28,755	20	22.2%
<i>Metropolitan Suburbs</i>	53,865	30	33.3%
<i>Small Cities/Edge Cities</i>	5,165	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	263,150	90	100.0%
Total County Households:	356,540		
Classified Households As A Share Of Total County Households:	73.8%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Orange County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	71,315	10	11.1%
<i>Metropolitan Cities</i>			
Urban Establishment	6,950	0	0.0%
Rowhouse Retirees	3,195	0	0.0%
<i>Subtotal:</i>	10,145	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	2,410	0	0.0%
Nouveau Money	770	0	0.0%
Post-War Suburban Pioneers	5,300	0	0.0%
Affluent Empty Nesters	5,800	0	0.0%
Blue-Collar Button-Downs	24,025	10	11.1%
Middle-American Retirees	8,760	0	0.0%
<i>Subtotal:</i>	47,065	10	11.1%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	10,945	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	10,945	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	3,160	0	0.0%
<i>Subtotal:</i>	3,160	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Orange County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	104,050	30	33.3%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	3,095	0	0.0%
Multi-Cultural Families	2,580	0	0.0%
Black Urban Families	6,295	0	0.0%
Latino Urban Families	17,615	10	11.1%
Subtotal:	29,585	10	11.1%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	14,425	10	11.1%
Kids 'r' Us	8,760	0	0.0%
Subtotal:	23,185	10	11.1%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	3,895	0	0.0%
Mainstream Families	0	0	0.0%
Subtotal:	3,895	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	5,405	0	0.0%
Full-Nest Exurbanites	10,720	0	0.0%
New-Town Families	1,440	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	26,605	10	11.1%
Young Homesteaders	0	0	0.0%
Subtotal:	44,170	10	11.1%
<i>Agrarian/Rural</i>			
Heartland Families	2,160	0	0.0%
Small-Town Families	1,055	0	0.0%
Rustic Families	0	0	0.0%
Subtotal:	3,215	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Orange County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	87,785	50	55.6%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	1,935	0	0.0%
Urban Achievers	17,625	10	11.1%
New Bohemians	9,195	10	11.1%
Subtotal:	<u>28,755</u>	<u>20</u>	<u>22.2%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	4,530	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	23,385	10	11.1%
Generation X	25,950	20	22.2%
Subtotal:	<u>53,865</u>	<u>30</u>	<u>33.3%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	1,590	0	0.0%
University/College Affiliates	3,575	0	0.0%
Subtotal:	<u>5,165</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Duval County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	73,605	20	25.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	51,095	10	12.5%
<i>Small Cities/Edge Cities</i>	22,270	10	12.5%
<i>Town & Country/Exurbs</i>	240	0	0.0%
Traditional & Non-Traditional Families	71,665	30	37.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	29,620	20	25.0%
<i>Small Cities/Edge Cities</i>	20,685	0	0.0%
<i>Town & Country/Exurbs</i>	16,000	10	12.5%
<i>Agrarian/Rural</i>	5,360	0	0.0%
Younger Singles & Couples	53,995	30	37.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	50,555	30	37.5%
<i>Small Cities/Edge Cities</i>	3,440	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	199,265	80	100.0%
Total County Households:	315,665		
Classified Households As A Share Of Total County Households:	63.1%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Duval County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	73,605	20	25.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	1,390	0	0.0%
Nouveau Money	5,635	0	0.0%
Post-War Suburban Pioneers	9,740	0	0.0%
Affluent Empty Nesters	9,020	0	0.0%
Blue-Collar Button-Downs	10,920	0	0.0%
Middle-American Retirees	14,390	10	12.5%
<i>Subtotal:</i>	51,095	10	12.5%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	12,045	10	12.5%
Active Retirees	1,635	0	0.0%
Blue-Collar Retirees	8,590	0	0.0%
<i>Subtotal:</i>	22,270	10	12.5%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	240	0	0.0%
<i>Subtotal:</i>	240	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Duval County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	71,665	30	37.5%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	13,905	10	12.5%
Kids 'r' Us	15,715	10	12.5%
<i>Subtotal:</i>	29,620	20	25.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	7,860	0	0.0%
Unibox Transferees	5,370	0	0.0%
Mainstream Families	7,455	0	0.0%
<i>Subtotal:</i>	20,685	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	500	0	0.0%
Full-Nest Exurbanites	1,060	0	0.0%
New-Town Families	1,400	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	13,040	10	12.5%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	16,000	10	12.5%
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	1,370	0	0.0%
Rustic Families	3,990	0	0.0%
<i>Subtotal:</i>	5,360	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Duval County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	53,995	30	37.5%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	1,290	0	0.0%
Fast-Track Professionals	4,460	0	0.0%
Suburban Achievers	17,135	10	12.5%
Generation X	27,670	20	25.0%
Subtotal:	<u>50,555</u>	<u>30</u>	<u>37.5%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	3,440	0	0.0%
University/College Affiliates	0	0	0.0%
Subtotal:	<u>3,440</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Hillsborough County, Florida

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	69,911	10	11.1%
<i>Metropolitan Cities</i>	7,370	0	0.0%
<i>Metropolitan Suburbs</i>	38,096	10	11.1%
<i>Small Cities/Edge Cities</i>	19,360	0	0.0%
<i>Town & Country/Exurbs</i>	5,085	0	0.0%
Traditional & Non-Traditional Families	144,710	40	44.4%
<i>Metropolitan Cities</i>	40,415	10	11.1%
<i>Metropolitan Suburbs</i>	27,025	10	11.1%
<i>Small Cities/Edge Cities</i>	31,310	10	11.1%
<i>Town & Country/Exurbs</i>	42,160	10	11.1%
<i>Agrarian/Rural</i>	3,800	0	0.0%
Younger Singles & Couples	88,040	40	44.4%
<i>Metropolitan Cities</i>	22,995	0	0.0%
<i>Metropolitan Suburbs</i>	50,995	30	33.3%
<i>Small Cities/Edge Cities</i>	13,710	10	11.1%
<i>Agrarian/Rural</i>	340	0	0.0%
Total:	302,661	90	100.0%
Total County Households:	409,700		
Classified Households As A Share Of Total County Households:	73.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Hillsborough County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	69,911	10	11.1%
<i>Metropolitan Cities</i>			
Urban Establishment	5,550	0	0.0%
Rowhouse Retirees	1,820	0	0.0%
<i>Subtotal:</i>	7,370	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	1,850	0	0.0%
Nouveau Money	1,265	0	0.0%
Post-War Suburban Pioneers	10,071	0	0.0%
Affluent Empty Nesters	5,670	0	0.0%
Blue-Collar Button-Downs	5,395	0	0.0%
Middle-American Retirees	13,845	10	11.1%
<i>Subtotal:</i>	38,096	10	11.1%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	2,200	0	0.0%
Active Retirees	14,135	0	0.0%
Blue-Collar Retirees	3,025	0	0.0%
<i>Subtotal:</i>	19,360	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	5,085	0	0.0%
<i>Subtotal:</i>	5,085	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Hillsborough County, Florida

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	144,710	40	44.4%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	650	0	0.0%
Multi-Cultural Families	2,315	0	0.0%
Black Urban Families	5,380	0	0.0%
Latino Urban Families	32,070	10	11.1%
Subtotal:	40,415	10	11.1%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	11,670	0	0.0%
Kids 'r' Us	15,355	10	11.1%
Subtotal:	27,025	10	11.1%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	7,095	0	0.0%
Unibox Transferees	19,330	10	11.1%
Mainstream Families	4,885	0	0.0%
Subtotal:	31,310	10	11.1%
<i>Town & Country/Exurbs</i>			
Exurban Elite	3,855	0	0.0%
Full-Nest Exurbanites	17,135	0	0.0%
New-Town Families	4,835	0	0.0%
Pillars of the Community	1,490	0	0.0%
Middle-American Families	14,845	10	11.1%
Young Homesteaders	0	0	0.0%
Subtotal:	42,160	10	11.1%
<i>Agrarian/Rural</i>			
Heartland Families	805	0	0.0%
Small-Town Families	2,775	0	0.0%
Rustic Families	220	0	0.0%
Subtotal:	3,800	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Kings County, New York

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	236,425	20	40.0%
<i>Metropolitan Cities</i>	233,545	20	40.0%
<i>Metropolitan Suburbs</i>	1,225	0	0.0%
<i>Small Cities/Edge Cities</i>	1,655	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	172,120	10	20.0%
<i>Metropolitan Cities</i>	172,120	10	20.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	158,045	20	40.0%
<i>Metropolitan Cities</i>	158,005	20	40.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	40	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	566,590	50	100.0%
Total County Households:	884,755		
Classified Households As A Share Of Total County Households:	64.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Kings County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	236,425	20	40.0%
<i>Metropolitan Cities</i>			
Urban Establishment	20,745	0	0.0%
Rowhouse Retirees	212,800	20	40.0%
<i>Subtotal:</i>	233,545	20	40.0%
<i>Metropolitan Suburbs</i>			
The Social Register	1,225	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	1,225	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	1,655	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	1,655	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Kings County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	172,120	10	20.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	49,740	0	0.0%
Multi-Cultural Families	9,645	0	0.0%
Black Urban Families	78,235	10	20.0%
Latino Urban Families	34,500	0	0.0%
Subtotal:	172,120	10	20.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	0	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
Subtotal:	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Kings County, New York

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	158,045	20	40.0%
<i>Metropolitan Cities</i>			
Urban Elite	10,915	0	0.0%
e-Types	49,215	10	20.0%
Urban Achievers	75,095	10	20.0%
New Bohemians	22,780	0	0.0%
<i>Subtotal:</i>	<u>158,005</u>	<u>20</u>	<u>40.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	40	0	0.0%
<i>Subtotal:</i>	<u>40</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Hillsborough County, Florida

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	88,040	40	44.4%
<i>Metropolitan Cities</i>			
Urban Elite	670	0	0.0%
e-Types	1,970	0	0.0%
Urban Achievers	10,125	0	0.0%
New Bohemians	10,230	0	0.0%
<i>Subtotal:</i>	<u>22,995</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	5,095	0	0.0%
Fast-Track Professionals	14,830	10	11.1%
Suburban Achievers	13,610	10	11.1%
Generation X	17,460	10	11.1%
<i>Subtotal:</i>	<u>50,995</u>	<u>30</u>	<u>33.3%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	4,450	0	0.0%
University/College Affiliates	9,260	10	11.1%
<i>Subtotal:</i>	<u>13,710</u>	<u>10</u>	<u>11.1%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	340	0	0.0%
<i>Subtotal:</i>	<u>340</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 23 Through 25
Orange, Duval and Hillsborough Counties, Florida

<u>Household Type/ Geographic Designation</u>	<u>Orange County</u>	<u>Duval County</u>	<u>Hillsborough County</u>	<u>Total</u>
Empty Nesters & Retirees	10	20	10	40
<i>Metropolitan Cities</i>	0	0	0	0
<i>Metropolitan Suburbs</i>	10	10	10	30
<i>Small Cities/Edge Cities</i>	0	10	0	10
<i>Town & Country/Exurbs</i>	0	0	0	0
Traditional & Non-Traditional Families	30	30	40	100
<i>Metropolitan Cities</i>	10	0	10	20
<i>Metropolitan Suburbs</i>	10	20	10	40
<i>Small Cities/Edge Cities</i>	0	0	10	10
<i>Town & Country/Exurbs</i>	10	10	10	30
<i>Agrarian/Rural</i>	0	0	0	0
Younger Singles & Couples	50	30	40	120
<i>Metropolitan Cities</i>	20	0	0	20
<i>Metropolitan Suburbs</i>	30	30	30	90
<i>Small Cities/Edge Cities</i>	0	0	10	10
<i>Agrarian/Rural</i>	0	0	0	0
Total:	90	80	90	260
Percent:	34.6%	30.8%	34.6%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 23 Through 25
Orange, Duval and Hillsborough Counties, Florida

	<u>Orange County</u>	<u>Duval County</u>	<u>Hillsborough County</u>	<u>Total</u>
Empty Nesters & Retirees	10	20	10	40
<i>Metropolitan Cities</i>				
Urban Establishment	0	0	0	0
Rowhouse Retirees	0	0	0	0
Subtotal:	0	0	0	0
<i>Metropolitan Suburbs</i>				
The Social Register	0	0	0	0
Nouveau Money	0	0	0	0
Post-War Suburban Pioneers	0	0	0	0
Affluent Empty Nesters	0	0	0	0
Blue-Collar Button-Downs	10	0	0	10
Middle-American Retirees	0	10	10	20
Subtotal:	10	10	10	30
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	0	10	0	10
Active Retirees	0	0	0	0
Blue-Collar Retirees	0	0	0	0
Subtotal:	0	10	0	10
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0	0	0
Subtotal:	0	0	0	0

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 23 Through 25
Orange, Duval and Hillsborough Counties, Florida

	<u>Orange County</u>	<u>Duval County</u>	<u>Hillsborough County</u>	<u>Total</u>
Traditional & Non-Traditional Families	30	30	40	100
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	0	0	0	0
Multi-Cultural Families	0	0	0	0
Black Urban Families	0	0	0	0
Latino Urban Families	10	0	10	20
Subtotal:	10	0	10	20
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	10	10	0	20
Kids 'r' Us	0	10	10	20
Subtotal:	10	20	10	40
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	0	0	0	0
Unibox Transferees	0	0	10	10
Mainstream Families	0	0	0	0
Subtotal:	0	0	10	10
<i>Town & Country/Exurbs</i>				
Exurban Elite	0	0	0	0
Full-Nest Exurbanites	0	0	0	0
New-Town Families	0	0	0	0
Pillars of the Community	0	0	0	0
Middle-American Families	10	10	10	30
Young Homesteaders	0	0	0	0
Subtotal:	10	10	10	30
<i>Agrarian/Rural</i>				
Heartland Families	0	0	0	0
Small-Town Families	0	0	0	0
Rustic Families	0	0	0	0
Subtotal:	0	0	0	0

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 23 Through 25
Orange, Duval and Hillsborough Counties, Florida

	<u>Orange County</u>	<u>Duval County</u>	<u>Hillsborough County</u>	<u>Total</u>
Younger Singles & Couples	50	30	40	120
<i>Metropolitan Cities</i>				
Urban Elite	0	0	0	0
e-Types	0	0	0	0
Urban Achievers	10	0	0	10
New Bohemians	10	0	0	10
<i>Subtotal:</i>	<u>20</u>	<u>0</u>	<u>0</u>	<u>20</u>
<i>Metropolitan Suburbs</i>				
The VIPs	0	0	0	0
Fast-Track Professionals	0	0	10	10
Suburban Achievers	10	10	10	30
Generation X	20	20	10	50
<i>Subtotal:</i>	<u>30</u>	<u>30</u>	<u>30</u>	<u>90</u>
<i>Small Cities/Edge Cities</i>				
Twentysomethings	0	0	0	0
University/College Affiliates	0	0	10	10
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Agrarian/Rural</i>				
PC Pioneers	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

New York County, New York

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	44,560	10	11.1%
<i>Metropolitan Cities</i>	43,855	10	11.1%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	705	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	2,955	0	0.0%
<i>Metropolitan Cities</i>	2,955	0	0.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	512,175	80	88.9%
<i>Metropolitan Cities</i>	510,245	80	88.9%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	1,930	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	559,690	90	100.0%
Total County Households:	737,565		
Classified Households As A Share Of Total County Households:	75.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

New York County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	44,560	10	11.1%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	43,855	10	11.1%
<i>Subtotal:</i>	43,855	10	11.1%
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	705	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	705	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
New York County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	2,955	0	0.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	1,360	0	0.0%
Black Urban Families	890	0	0.0%
Latino Urban Families	705	0	0.0%
Subtotal:	2,955	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	0	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	0	0	0.0%
Subtotal:	0	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
Subtotal:	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
New York County, New York

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	512,175	80	88.9%
<i>Metropolitan Cities</i>			
Urban Elite	332,550	50	55.6%
e-Types	31,570	10	11.1%
Urban Achievers	21,960	0	0.0%
New Bohemians	124,165	20	22.2%
<i>Subtotal:</i>	<u>510,245</u>	<u>80</u>	<u>88.9%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	1,930	0	0.0%
<i>Subtotal:</i>	<u>1,930</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Kings County, New York

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	236,425	20	40.0%
<i>Metropolitan Cities</i>	233,545	20	40.0%
<i>Metropolitan Suburbs</i>	1,225	0	0.0%
<i>Small Cities/Edge Cities</i>	1,655	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	172,120	10	20.0%
<i>Metropolitan Cities</i>	172,120	10	20.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	158,045	20	40.0%
<i>Metropolitan Cities</i>	158,005	20	40.0%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	40	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	566,590	50	100.0%
Total County Households:	884,755		
Classified Households As A Share Of Total County Households:	64.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Kings County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	236,425	20	40.0%
<i>Metropolitan Cities</i>			
Urban Establishment	20,745	0	0.0%
Rowhouse Retirees	212,800	20	40.0%
<i>Subtotal:</i>	233,545	20	40.0%
<i>Metropolitan Suburbs</i>			
The Social Register	1,225	0	0.0%
Nouveau Money	0	0	0.0%
Post-War Suburban Pioneers	0	0	0.0%
Affluent Empty Nesters	0	0	0.0%
Blue-Collar Button-Downs	0	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	1,225	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	1,655	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	1,655	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Kings County, New York

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	172,120	10	20.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	49,740	0	0.0%
Multi-Cultural Families	9,645	0	0.0%
Black Urban Families	78,235	10	20.0%
Latino Urban Families	34,500	0	0.0%
<i>Subtotal:</i>	<u>172,120</u>	<u>10</u>	<u>20.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	0	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Kings County, New York

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	158,045	20	40.0%
<i>Metropolitan Cities</i>			
Urban Elite	10,915	0	0.0%
e-Types	49,215	10	20.0%
Urban Achievers	75,095	10	20.0%
New Bohemians	22,780	0	0.0%
<i>Subtotal:</i>	<u>158,005</u>	<u>20</u>	<u>40.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0.0%
Fast-Track Professionals	0	0	0.0%
Suburban Achievers	0	0	0.0%
Generation X	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	40	0	0.0%
<i>Subtotal:</i>	<u>40</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In The New York City Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 27 And 28

New York and King Counties, New York

<u>Household Type/ Geographic Designation</u>	<u>New York County</u>	<u>Kings County</u>	<u>Total</u>
Empty Nesters & Retirees	10	20	30
<i>Metropolitan Cities</i>	10	20	30
<i>Metropolitan Suburbs</i>	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0
Traditional & Non-Traditional Families	0	10	10
<i>Metropolitan Cities</i>	0	10	10
<i>Metropolitan Suburbs</i>	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0
<i>Agrarian/Rural</i>	0	0	0
Younger Singles & Couples	80	20	100
<i>Metropolitan Cities</i>	80	20	100
<i>Metropolitan Suburbs</i>	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Agrarian/Rural</i>	0	0	0
Total:	90	50	140
Percent:	64.3%	35.7%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The New York City Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 27 And 28

New York and King Counties, New York

	<u>New York County</u>	<u>Kings County</u>	<u>Total</u>
Empty Nesters & Retirees	10	20	30
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0
Rowhouse Retirees	10	20	30
<i>Subtotal:</i>	10	20	30
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0
Nouveau Money	0	0	0
Post-War Suburban Pioneers	0	0	0
Affluent Empty Nesters	0	0	0
Blue-Collar Button-Downs	0	0	0
Middle-American Retirees	0	0	0
<i>Subtotal:</i>	0	0	0
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0
Active Retirees	0	0	0
Blue-Collar Retirees	0	0	0
<i>Subtotal:</i>	0	0	0
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0
<i>Subtotal:</i>	0	0	0

**Draw Area Households In The New York City Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 27 And 28

New York and King Counties, New York

	<u>New York County</u>	<u>Kings County</u>	<u>Total</u>
Traditional & Non-Traditional Families	0	10	10
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0
Multi-Cultural Families	0	0	0
Black Urban Families	0	10	10
Latino Urban Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0
Kids 'r' Us	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0
Unibox Transferees	0	0	0
Mainstream Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0
Full-Nest Exurbanites	0	0	0
New-Town Families	0	0	0
Pillars of the Community	0	0	0
Middle-American Families	0	0	0
Young Homesteaders	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0
Small-Town Families	0	0	0
Rustic Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The New York City Metro Area
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 27 And 28

New York and King Counties, New York

	<u>New York County</u>	<u>Kings County</u>	<u>Total</u>
Younger Singles & Couples	80	20	100
<i>Metropolitan Cities</i>			
Urban Elite	50	0	50
e-Types	10	10	20
Urban Achievers	0	10	10
New Bohemians	20	0	20
<i>Subtotal:</i>	<u>80</u>	<u>20</u>	<u>100</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0
Fast-Track Professionals	0	0	0
Suburban Achievers	0	0	0
Generation X	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0
University/College Affiliates	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Mecklenburg County, North Carolina

<u>Household Type/ Geographic Designation</u>	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	45,995	10	7.7%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	26,520	0	0.0%
<i>Small Cities/Edge Cities</i>	19,475	10	7.7%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	126,210	70	53.8%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	12,185	0	0.0%
<i>Small Cities/Edge Cities</i>	43,450	30	23.1%
<i>Town & Country/Exurbs</i>	69,825	40	30.8%
<i>Agrarian/Rural</i>	750	0	0.0%
Younger Singles & Couples	65,875	50	38.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	40,795	30	23.1%
<i>Small Cities/Edge Cities</i>	25,080	20	15.4%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	238,080	130	100.0%
Total County Households:	286,945		
Classified Households As A Share Of Total County Households:	83.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Mecklenburg County, North Carolina

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	45,995	10	7.7%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	3,950	0	0.0%
Nouveau Money	12,455	0	0.0%
Post-War Suburban Pioneers	4,355	0	0.0%
Affluent Empty Nesters	710	0	0.0%
Blue-Collar Button-Downs	5,050	0	0.0%
Middle-American Retirees	0	0	0.0%
<i>Subtotal:</i>	26,520	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	11,805	10	7.7%
Active Retirees	995	0	0.0%
Blue-Collar Retirees	6,675	0	0.0%
<i>Subtotal:</i>	19,475	10	7.7%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Mecklenburg County, North Carolina

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	126,210	70	53.8%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	5,770	0	0.0%
Kids 'r' Us	6,415	0	0.0%
<i>Subtotal:</i>	<u>12,185</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	12,995	10	7.7%
Unibox Transferees	16,505	10	7.7%
Mainstream Families	13,950	10	7.7%
<i>Subtotal:</i>	<u>43,450</u>	<u>30</u>	<u>23.1%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	14,365	10	7.7%
Full-Nest Exurbanites	32,310	20	15.4%
New-Town Families	6,390	0	0.0%
Pillars of the Community	560	0	0.0%
Middle-American Families	15,175	10	7.7%
Young Homesteaders	1,025	0	0.0%
<i>Subtotal:</i>	<u>69,825</u>	<u>40</u>	<u>30.8%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	750	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>750</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Mecklenburg County, North Carolina

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	65,875	50	38.5%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	13,425	10	7.7%
Fast-Track Professionals	4,065	0	0.0%
Suburban Achievers	16,305	10	7.7%
Generation X	7,000	10	7.7%
<i>Subtotal:</i>	<u>40,795</u>	<u>30</u>	<u>23.1%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	23,685	20	15.4%
University/College Affiliates	1,395	0	0.0%
<i>Subtotal:</i>	<u>25,080</u>	<u>20</u>	<u>15.4%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Wake County, North Carolina

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	28,730	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	16,410	0	0.0%
<i>Small Cities/Edge Cities</i>	11,560	0	0.0%
<i>Town & Country/Exurbs</i>	760	0	0.0%
Traditional & Non-Traditional Families	127,075	50	55.6%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	20,115	10	11.1%
<i>Small Cities/Edge Cities</i>	29,325	10	11.1%
<i>Town & Country/Exurbs</i>	66,455	30	33.3%
<i>Agrarian/Rural</i>	11,180	0	0.0%
Younger Singles & Couples	71,770	40	44.4%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	52,250	30	33.3%
<i>Small Cities/Edge Cities</i>	19,520	10	11.1%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	227,575	90	100.0%
Total County Households:	254,505		
Classified Households As A Share Of Total County Households:	89.4%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Wake County, North Carolina

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	28,730	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	3,870	0	0.0%
Nouveau Money	5,190	0	0.0%
Post-War Suburban Pioneers	1,660	0	0.0%
Affluent Empty Nesters	4,730	0	0.0%
Blue-Collar Button-Downs	560	0	0.0%
Middle-American Retirees	400	0	0.0%
<i>Subtotal:</i>	16,410	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	7,970	0	0.0%
Active Retirees	705	0	0.0%
Blue-Collar Retirees	2,885	0	0.0%
<i>Subtotal:</i>	11,560	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	760	0	0.0%
<i>Subtotal:</i>	760	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Wake County, North Carolina

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	127,075	50	55.6%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	11,970	10	11.1%
Kids 'r' Us	8,145	0	0.0%
<i>Subtotal:</i>	<u>20,115</u>	<u>10</u>	<u>11.1%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	8,135	0	0.0%
Unibox Transferees	18,585	10	11.1%
Mainstream Families	2,605	0	0.0%
<i>Subtotal:</i>	<u>29,325</u>	<u>10</u>	<u>11.1%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	11,605	0	0.0%
Full-Nest Exurbanites	16,465	10	11.1%
New-Town Families	15,830	10	11.1%
Pillars of the Community	0	0	0.0%
Middle-American Families	21,500	10	11.1%
Young Homesteaders	1,055	0	0.0%
<i>Subtotal:</i>	<u>66,455</u>	<u>30</u>	<u>33.3%</u>
<i>Agrarian/Rural</i>			
Heartland Families	7,135	0	0.0%
Small-Town Families	3,460	0	0.0%
Rustic Families	585	0	0.0%
<i>Subtotal:</i>	<u>11,180</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Wake County, North Carolina

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	71,770	40	44.4%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	18,490	10	11.1%
Fast-Track Professionals	14,435	10	11.1%
Suburban Achievers	6,740	0	0.0%
Generation X	12,585	10	11.1%
Subtotal:	<u>52,250</u>	<u>30</u>	<u>33.3%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	14,970	10	11.1%
University/College Affiliates	4,550	0	0.0%
Subtotal:	<u>19,520</u>	<u>10</u>	<u>11.1%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In North Carolina Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 30 And 31
Mecklenburg and Wake Counties, North Carolina

<u>Household Type/ Geographic Designation</u>	<u>Mecklenburg County</u>	<u>Wake County</u>	<u>Total</u>
Empty Nesters & Retirees	10	0	10
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	0	0	0
<i>Small Cities/Edge Cities</i>	10	0	10
<i>Town & Country/Exurbs</i>	0	0	0
Traditional & Non-Traditional Families	70	50	120
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	0	10	10
<i>Small Cities/Edge Cities</i>	30	10	40
<i>Town & Country/Exurbs</i>	40	30	70
<i>Agrarian/Rural</i>	0	0	0
Younger Singles & Couples	50	40	90
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	30	30	60
<i>Small Cities/Edge Cities</i>	20	10	30
<i>Agrarian/Rural</i>	0	0	0
Total:	130	90	220
Percent:	59.1%	40.9%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In North Carolina Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 30 And 31
Mecklenburg and Wake Counties, North Carolina

	<u>Mecklenburg County</u>	<u>Wake County</u>	<u>Total</u>
Empty Nesters & Retirees	10	0	10
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0
Rowhouse Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0
Nouveau Money	0	0	0
Post-War Suburban Pioneers	0	0	0
Affluent Empty Nesters	0	0	0
Blue-Collar Button-Downs	0	0	0
Middle-American Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	10	0	10
Active Retirees	0	0	0
Blue-Collar Retirees	0	0	0
<i>Subtotal:</i>	<u>10</u>	<u>0</u>	<u>10</u>
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Draw Area Households In North Carolina Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 30 And 31
Mecklenburg and Wake Counties, North Carolina

	<u>Mecklenburg County</u>	<u>Wake County</u>	<u>Total</u>
Traditional & Non-Traditional Families	70	50	120
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0
Multi-Cultural Families	0	0	0
Black Urban Families	0	0	0
Latino Urban Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	10	10
Kids 'r' Us	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	10	0	10
Unibox Transferees	10	10	20
Mainstream Families	10	0	10
<i>Subtotal:</i>	<u>30</u>	<u>10</u>	<u>40</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	10	0	10
Full-Nest Exurbanites	20	10	30
New-Town Families	0	10	10
Pillars of the Community	0	0	0
Middle-American Families	10	10	20
Young Homesteaders	0	0	0
<i>Subtotal:</i>	<u>40</u>	<u>30</u>	<u>70</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0
Small-Town Families	0	0	0
Rustic Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In North Carolina Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 30 And 31
Mecklenburg and Wake Counties, North Carolina

	<u>Mecklenburg County</u>	<u>Wake County</u>	<u>Total</u>
Younger Singles & Couples	50	40	90
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0
e-Types	0	0	0
Urban Achievers	0	0	0
New Bohemians	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The VIPs	10	10	20
Fast-Track Professionals	0	10	10
Suburban Achievers	10	0	10
Generation X	10	10	20
<i>Subtotal:</i>	<u>30</u>	<u>30</u>	<u>60</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	20	10	30
University/College Affiliates	0	0	0
<i>Subtotal:</i>	<u>20</u>	<u>10</u>	<u>30</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Shelby County, Tennessee

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	61,560	0	0.0%
<i>Metropolitan Cities</i>	2,365	0	0.0%
<i>Metropolitan Suburbs</i>	56,125	0	0.0%
<i>Small Cities/Edge Cities</i>	2,845	0	0.0%
<i>Town & Country/Exurbs</i>	225	0	0.0%
Traditional & Non-Traditional Families	64,215	10	20.0%
<i>Metropolitan Cities</i>	3,070	0	0.0%
<i>Metropolitan Suburbs</i>	31,450	10	20.0%
<i>Small Cities/Edge Cities</i>	2,575	0	0.0%
<i>Town & Country/Exurbs</i>	22,865	0	0.0%
<i>Agrarian/Rural</i>	4,255	0	0.0%
Younger Singles & Couples	77,980	40	80.0%
<i>Metropolitan Cities</i>	16,975	0	0.0%
<i>Metropolitan Suburbs</i>	57,880	40	80.0%
<i>Small Cities/Edge Cities</i>	3,125	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	203,755	50	100.0%
Total County Households	340,365		
Classified Households As A Share Of Total County Households:	59.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Shelby County, Tennessee

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	61,560	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	1,495	0	0.0%
Rowhouse Retirees	870	0	0.0%
<i>Subtotal:</i>	2,365	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	7,385	0	0.0%
Nouveau Money	9,820	0	0.0%
Post-War Suburban Pioneers	12,070	0	0.0%
Affluent Empty Nesters	11,330	0	0.0%
Blue-Collar Button-Downs	5,620	0	0.0%
Middle-American Retirees	9,900	0	0.0%
<i>Subtotal:</i>	56,125	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	2,845	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	2,845	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	225	0	0.0%
<i>Subtotal:</i>	225	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Shelby County, Tennessee

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	64,215	10	20.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	710	0	0.0%
Black Urban Families	2,360	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>3,070</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	28,855	10	20.0%
Kids 'r' Us	2,595	0	0.0%
<i>Subtotal:</i>	<u>31,450</u>	<u>10</u>	<u>20.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	2,575	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>2,575</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	6,760	0	0.0%
Full-Nest Exurbanites	8,710	0	0.0%
New-Town Families	4,585	0	0.0%
Pillars of the Community	0	0	0.0%
Mainstream Families	2,810	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>22,865</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,285	0	0.0%
Small-Town Families	2,970	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>4,255</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Shelby County, Tennessee

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	77,980	40	80.0%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	3,850	0	0.0%
Urban Achievers	5,785	0	0.0%
New Bohemians	7,340	0	0.0%
Subtotal:	<u>16,975</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	14,735	10	20.0%
Fast-Track Professionals	12,715	10	20.0%
Suburban Achievers	15,445	10	20.0%
Generation X	14,985	10	20.0%
Subtotal:	<u>57,880</u>	<u>40</u>	<u>80.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	3,125	0	0.0%
Subtotal:	<u>3,125</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Davidson County, Tennessee

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	55,210	10	12.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	30,885	0	0.0%
<i>Small Cities/Edge Cities</i>	24,325	10	12.5%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	46,505	0	0.0%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	3,595	0	0.0%
<i>Small Cities/Edge Cities</i>	15,935	0	0.0%
<i>Town & Country/Exurbs</i>	23,765	0	0.0%
<i>Agrarian/Rural</i>	3,210	0	0.0%
Younger Singles & Couples	72,755	70	87.5%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	63,820	60	75.0%
<i>Small Cities/Edge Cities</i>	8,935	10	12.5%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	174,470	80	100.0%
Total County Households:	238,750		
Classified Households As A Share Of Total County Households:	73.1%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Davidson County, Tennessee

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	55,210	10	12.5%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	3,085	0	0.0%
Nouveau Money	1,670	0	0.0%
Post-War Suburban Pioneers	8,340	0	0.0%
Affluent Empty Nesters	4,490	0	0.0%
Blue-Collar Button-Downs	8,670	0	0.0%
Middle-American Retirees	4,630	0	0.0%
<i>Subtotal:</i>	30,885	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	8,380	0	0.0%
Active Retirees	3,455	0	0.0%
Blue-Collar Retirees	12,490	10	12.5%
<i>Subtotal:</i>	24,325	10	12.5%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Davidson County, Tennessee

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	46,505	0	0.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	2,470	0	0.0%
Kids 'r' Us	1,125	0	0.0%
<i>Subtotal:</i>	3,595	0	0.0%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	3,875	0	0.0%
Unibox Transferees	4,615	0	0.0%
Mainstream Families	7,445	0	0.0%
<i>Subtotal:</i>	15,935	0	0.0%
<i>Town & Country/Exurbs</i>			
Exurban Elite	4,095	0	0.0%
Full-Nest Exurbanites	6,700	0	0.0%
New-Town Families	4,130	0	0.0%
Pillars of the Community	440	0	0.0%
Middle-American Families	6,930	0	0.0%
Young Homesteaders	1,470	0	0.0%
<i>Subtotal:</i>	23,765	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	2,095	0	0.0%
Small-Town Families	315	0	0.0%
Rustic Families	800	0	0.0%
<i>Subtotal:</i>	3,210	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Davidson County, Tennessee

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	72,755	70	87.5%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	7,785	10	12.5%
Fast-Track Professionals	12,075	10	12.5%
Suburban Achievers	24,135	20	25.0%
Generation X	19,825	20	25.0%
Subtotal:	<u>63,820</u>	<u>60</u>	<u>75.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	6,565	10	12.5%
University/College Affiliates	2,370	0	0.0%
Subtotal:	<u>8,935</u>	<u>10</u>	<u>12.5%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Draw Area Households In Tennessee Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 33 And 34

Shelby and Davidson Counties, Tennessee

<u>Household Type/ Geographic Designation</u>	<u>Shelby County</u>	<u>Davidson County</u>	<u>Total</u>
Empty Nesters & Retirees	0	10	10
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	0	0	0
<i>Small Cities/Edge Cities</i>	0	10	10
<i>Town & Country/Exurbs</i>	0	0	0
Traditional & Non-Traditional Families	10	0	10
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	10	0	10
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0
<i>Agrarian/Rural</i>	0	0	0
Younger Singles & Couples	40	70	110
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	40	60	100
<i>Small Cities/Edge Cities</i>	0	10	10
<i>Agrarian/Rural</i>	0	0	0
Total:	50	80	130
Percent:	38.5%	61.5%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Tennessee Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 33 And 34

Shelby and Davidson Counties, Tennessee

	<u>Shelby County</u>	<u>Davidson County</u>	<u>Total</u>
Empty Nesters & Retirees	0	10	10
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0
Rowhouse Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0
Nouveau Money	0	0	0
Post-War Suburban Pioneers	0	0	0
Affluent Empty Nesters	0	0	0
Blue-Collar Button-Downs	0	0	0
Middle-American Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0
Active Retirees	0	0	0
Blue-Collar Retirees	0	10	10
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Draw Area Households In Tennessee Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 33 And 34

Shelby and Davidson Counties, Tennessee

	<u>Shelby County</u>	<u>Davidson County</u>	<u>Total</u>
Traditional & Non-Traditional Families	10	0	10
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0
Multi-Cultural Families	0	0	0
Black Urban Families	0	0	0
Latino Urban Families	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	10	0	10
Kids 'r' Us	0	0	0
Subtotal:	<u>10</u>	<u>0</u>	<u>10</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0
Unibox Transferees	0	0	0
Mainstream Families	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0
Full-Nest Exurbanites	0	0	0
New-Town Families	0	0	0
Pillars of the Community	0	0	0
Middle-American Families	0	0	0
Young Homesteaders	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0
Small-Town Families	0	0	0
Rustic Families	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Tennessee Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 33 And 34

Shelby and Davidson Counties, Tennessee

	<u>Shelby County</u>	<u>Davidson County</u>	<u>Total</u>
Younger Singles & Couples	40	70	110
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0
e-Types	0	0	0
Urban Achievers	0	0	0
New Bohemians	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The VIPs	10	10	20
Fast-Track Professionals	10	10	20
Suburban Achievers	10	20	30
Generation X	10	20	30
<i>Subtotal:</i>	<u>40</u>	<u>60</u>	<u>100</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	10	10
University/College Affiliates	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Dallas County, Texas

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	185,325	20	22.2%
<i>Metropolitan Cities</i>	36,545	0	0.0%
<i>Metropolitan Suburbs</i>	136,555	20	22.2%
<i>Small Cities/Edge Cities</i>	12,225	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	193,125	20	22.2%
<i>Metropolitan Cities</i>	50,410	0	0.0%
<i>Metropolitan Suburbs</i>	75,215	10	11.1%
<i>Small Cities/Edge Cities</i>	44,875	10	11.1%
<i>Town & Country/Exurbs</i>	21,930	0	0.0%
<i>Agrarian/Rural</i>	695	0	0.0%
Younger Singles & Couples	192,725	50	55.6%
<i>Metropolitan Cities</i>	105,325	30	33.3%
<i>Metropolitan Suburbs</i>	73,810	20	22.2%
<i>Small Cities/Edge Cities</i>	13,590	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	571,175	90	100.0%
Total County Households:	826,990		
Classified Households As A Share Of Total County Households:	69.1%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Dallas County, Texas

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	185,325	20	22.2%
<i>Metropolitan Cities</i>			
Urban Establishment	27,985	0	0.0%
Rowhouse Retirees	8,560	0	0.0%
<i>Subtotal:</i>	36,545	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	24,345	0	0.0%
Nouveau Money	29,065	10	11.1%
Post-War Suburban Pioneers	20,595	0	0.0%
Affluent Empty Nesters	22,925	0	0.0%
Blue-Collar Button-Downs	34,375	10	11.1%
Middle-American Retirees	5,250	0	0.0%
<i>Subtotal:</i>	136,555	20	22.2%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	4,490	0	0.0%
Active Retirees	4,940	0	0.0%
Blue-Collar Retirees	2,795	0	0.0%
<i>Subtotal:</i>	12,225	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Dallas County, Texas

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	193,125	20	22.2%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	18,130	0	0.0%
Multi-Cultural Families	9,070	0	0.0%
Black Urban Families	7,475	0	0.0%
Latino Urban Families	15,735	0	0.0%
Subtotal:	50,410	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	59,470	10	11.1%
Kids 'r' Us	15,745	0	0.0%
Subtotal:	75,215	10	11.1%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	9,975	0	0.0%
Unibox Transferees	18,790	10	11.1%
Mainstream Families	16,110	0	0.0%
Subtotal:	44,875	10	11.1%
<i>Town & Country/Exurbs</i>			
Exurban Elite	2,135	0	0.0%
Full-Nest Exurbanites	3,505	0	0.0%
New-Town Families	5,755	0	0.0%
Pillars of the Community	2,405	0	0.0%
Middle-American Families	6,540	0	0.0%
Young Homesteaders	1,590	0	0.0%
Subtotal:	21,930	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	345	0	0.0%
Rustic Families	350	0	0.0%
Subtotal:	695	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Dallas County, Texas

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	192,725	50	55.6%
<i>Metropolitan Cities</i>			
Urban Elite	1,930	0	0.0%
e-Types	23,870	10	11.1%
Urban Achievers	19,270	0	0.0%
New Bohemians	60,255	20	22.2%
<i>Subtotal:</i>	<u>105,325</u>	<u>30</u>	<u>33.3%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	11,170	0	0.0%
Fast-Track Professionals	14,270	0	0.0%
Suburban Achievers	26,665	10	11.1%
Generation X	21,705	10	11.1%
<i>Subtotal:</i>	<u>73,810</u>	<u>20</u>	<u>22.2%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	10,170	0	0.0%
University/College Affiliates	3,420	0	0.0%
<i>Subtotal:</i>	<u>13,590</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Harris County, Texas

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	218,175	10	14.3%
<i>Metropolitan Cities</i>	41,355	0	0.0%
<i>Metropolitan Suburbs</i>	158,280	10	14.3%
<i>Small Cities/Edge Cities</i>	17,935	0	0.0%
<i>Town & Country/Exurbs</i>	605	0	0.0%
Traditional & Non-Traditional Families	377,635	30	42.9%
<i>Metropolitan Cities</i>	61,390	0	0.0%
<i>Metropolitan Suburbs</i>	77,870	10	14.3%
<i>Small Cities/Edge Cities</i>	176,410	20	28.6%
<i>Town & Country/Exurbs</i>	59,550	0	0.0%
<i>Agrarian/Rural</i>	2,415	0	0.0%
Younger Singles & Couples	260,000	30	42.9%
<i>Metropolitan Cities</i>	116,010	10	14.3%
<i>Metropolitan Suburbs</i>	108,875	20	28.6%
<i>Small Cities/Edge Cities</i>	35,115	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	855,810	70	100.0%
Total County Households:	1,241,145		
Classified Households As A Share Of Total County Households:	69.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Harris County, Texas

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	218,175	10	14.3%
<i>Metropolitan Cities</i>			
Urban Establishment	22,360	0	0.0%
Rowhouse Retirees	18,995	0	0.0%
<i>Subtotal:</i>	41,355	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	24,010	0	0.0%
Nouveau Money	29,715	0	0.0%
Post-War Suburban Pioneers	18,915	0	0.0%
Affluent Empty Nesters	12,290	0	0.0%
Blue-Collar Button-Downs	65,275	10	14.3%
Middle-American Retirees	8,075	0	0.0%
<i>Subtotal:</i>	158,280	10	14.3%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	10,030	0	0.0%
Active Retirees	3,805	0	0.0%
Blue-Collar Retirees	4,100	0	0.0%
<i>Subtotal:</i>	17,935	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	605	0	0.0%
<i>Subtotal:</i>	605	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Harris County, Texas

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	377,635	30	42.9%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	21,620	0	0.0%
Multi-Cultural Families	9,835	0	0.0%
Black Urban Families	12,620	0	0.0%
Latino Urban Families	17,315	0	0.0%
Subtotal:	61,390	0	0.0%
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	61,310	10	14.3%
Kids 'r' Us	16,560	0	0.0%
Subtotal:	77,870	10	14.3%
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	33,015	0	0.0%
Unibox Transferees	113,665	20	28.6%
Mainstream Families	29,730	0	0.0%
Subtotal:	176,410	20	28.6%
<i>Town & Country/Exurbs</i>			
Exurban Elite	2,350	0	0.0%
Full-Nest Exurbanites	23,910	0	0.0%
New-Town Families	11,905	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	21,385	0	0.0%
Young Homesteaders	0	0	0.0%
Subtotal:	59,550	0	0.0%
<i>Agrarian/Rural</i>			
Heartland Families	545	0	0.0%
Small-Town Families	1,870	0	0.0%
Rustic Families	0	0	0.0%
Subtotal:	2,415	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Harris County, Texas

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	260,000	30	42.9%
<i>Metropolitan Cities</i>			
Urban Elite	9,280	0	0.0%
e-Types	21,560	0	0.0%
Urban Achievers	15,740	0	0.0%
New Bohemians	69,430	10	14.3%
Subtotal:	<u>116,010</u>	<u>10</u>	<u>14.3%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	14,310	0	0.0%
Fast-Track Professionals	32,310	10	14.3%
Suburban Achievers	31,020	0	0.0%
Generation X	31,235	10	14.3%
Subtotal:	<u>108,875</u>	<u>20</u>	<u>28.6%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	25,330	0	0.0%
University/College Affiliates	9,785	0	0.0%
Subtotal:	<u>35,115</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Texas Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 36 And 37

Dallas and Harris Counties, Texas

<u>Household Type/ Geographic Designation</u>	<u>Dallas County</u>	<u>Harris County</u>	<u>Total</u>
Empty Nesters & Retirees	20	10	30
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	20	10	30
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0
Traditional & Non-Traditional Families	20	30	50
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	10	10	20
<i>Small Cities/Edge Cities</i>	10	20	30
<i>Town & Country/Exurbs</i>	0	0	0
<i>Agrarian/Rural</i>	0	0	0
Younger Singles & Couples	50	30	80
<i>Metropolitan Cities</i>	30	10	40
<i>Metropolitan Suburbs</i>	20	20	40
<i>Small Cities/Edge Cities</i>	0	0	0
<i>Agrarian/Rural</i>	0	0	0
Total:	90	70	160
Percent:	56.3%	43.8%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Texas Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 36 And 37

Dallas and Harris Counties, Texas

	<u>Dallas County</u>	<u>Harris County</u>	<u>Total</u>
Empty Nesters & Retirees	20	10	30
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0
Rowhouse Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0
Nouveau Money	10	0	10
Post-War Suburban Pioneers	0	0	0
Affluent Empty Nesters	0	0	0
Blue-Collar Button-Downs	10	10	20
Middle-American Retirees	0	0	0
<i>Subtotal:</i>	<u>20</u>	<u>10</u>	<u>30</u>
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0
Active Retirees	0	0	0
Blue-Collar Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Draw Area Households In Texas Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 36 And 37

Dallas and Harris Counties, Texas

	<u>Dallas County</u>	<u>Harris County</u>	<u>Total</u>
Traditional & Non-Traditional Families	20	30	50
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0
Multi-Cultural Families	0	0	0
Black Urban Families	0	0	0
Latino Urban Families	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	10	10	20
Kids 'r' Us	0	0	0
Subtotal:	<u>10</u>	<u>10</u>	<u>20</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0
Unibox Transferees	10	20	30
Mainstream Families	0	0	0
Subtotal:	<u>10</u>	<u>20</u>	<u>30</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0
Full-Nest Exurbanites	0	0	0
New-Town Families	0	0	0
Pillars of the Community	0	0	0
Middle-American Families	0	0	0
Young Homesteaders	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0
Small-Town Families	0	0	0
Rustic Families	0	0	0
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Texas Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 36 And 37

Dallas and Harris Counties, Texas

	<u>Dallas County</u>	<u>Harris County</u>	<u>Total</u>
Younger Singles & Couples	50	30	80
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0
e-Types	10	0	10
Urban Achievers	0	0	0
New Bohemians	20	10	30
<i>Subtotal:</i>	<u>30</u>	<u>10</u>	<u>40</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0
Fast-Track Professionals	0	10	10
Suburban Achievers	10	0	10
Generation X	10	10	20
<i>Subtotal:</i>	<u>20</u>	<u>20</u>	<u>40</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0
University/College Affiliates	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Cook County, Illinois

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	568,565	60	30.0%
<i>Metropolitan Cities</i>	169,530	20	10.0%
<i>Metropolitan Suburbs</i>	365,345	40	20.0%
<i>Small Cities/Edge Cities</i>	33,690	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	577,725	70	35.0%
<i>Metropolitan Cities</i>	488,150	60	30.0%
<i>Metropolitan Suburbs</i>	71,985	10	5.0%
<i>Small Cities/Edge Cities</i>	10,375	0	0.0%
<i>Town & Country/Exurbs</i>	7,215	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	436,475	70	35.0%
<i>Metropolitan Cities</i>	313,040	60	30.0%
<i>Metropolitan Suburbs</i>	115,310	10	5.0%
<i>Small Cities/Edge Cities</i>	8,125	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	1,582,765	200	100.0%
Total County Households:	1,976,120		
Classified Households As A Share Of Total County Households:	80.1%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Cook County, Illinois

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	568,565	60	30.0%
<i>Metropolitan Cities</i>			
Urban Establishment	80,550	10	5.0%
Rowhouse Retirees	88,980	10	5.0%
<i>Subtotal:</i>	169,530	20	10.0%
<i>Metropolitan Suburbs</i>			
The Social Register	38,360	0	0.0%
Nouveau Money	65,400	10	5.0%
Post-War Suburban Pioneers	63,550	10	5.0%
Affluent Empty Nesters	59,825	10	5.0%
Blue-Collar Button-Downs	110,655	10	5.0%
Middle-American Retirees	27,555	0	0.0%
<i>Subtotal:</i>	365,345	40	20.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	570	0	0.0%
Active Retirees	33,120	0	0.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	33,690	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Cook County, Illinois

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	577,725	70	35.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	118,990	10	5.0%
Multi-Cultural Families	24,290	0	0.0%
Black Urban Families	142,515	20	10.0%
Latino Urban Families	202,355	30	15.0%
<i>Subtotal:</i>	<u>488,150</u>	<u>60</u>	<u>30.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	66,605	10	5.0%
Kids 'r' Us	5,380	0	0.0%
<i>Subtotal:</i>	<u>71,985</u>	<u>10</u>	<u>5.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	2,070	0	0.0%
Unibox Transferees	6,895	0	0.0%
Mainstream Families	1,410	0	0.0%
<i>Subtotal:</i>	<u>10,375</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	1,365	0	0.0%
Full-Nest Exurbanites	3,440	0	0.0%
New-Town Families	335	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	2,075	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>7,215</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Cook County, Illinois

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	436,475	70	35.0%
<i>Metropolitan Cities</i>			
Urban Elite	55,640	10	5.0%
e-Types	75,095	10	5.0%
Urban Achievers	40,460	10	5.0%
New Bohemians	141,845	30	15.0%
<i>Subtotal:</i>	<u>313,040</u>	<u>60</u>	<u>30.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	26,570	0	0.0%
Fast-Track Professionals	18,300	0	0.0%
Suburban Achievers	64,385	10	5.0%
Generation X	6,055	0	0.0%
<i>Subtotal:</i>	<u>115,310</u>	<u>10</u>	<u>5.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	8,125	0	0.0%
<i>Subtotal:</i>	<u>8,125</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Los Angeles County, California

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	691,640	20	16.7%
<i>Metropolitan Cities</i>	214,275	10	8.3%
<i>Metropolitan Suburbs</i>	449,765	10	8.3%
<i>Small Cities/Edge Cities</i>	26,310	0	0.0%
<i>Town & Country/Exurbs</i>	1,290	0	0.0%
Traditional & Non-Traditional Families	1,163,002	60	50.0%
<i>Metropolitan Cities</i>	926,840	50	41.7%
<i>Metropolitan Suburbs</i>	99,455	10	8.3%
<i>Small Cities/Edge Cities</i>	96,305	0	0.0%
<i>Town & Country/Exurbs</i>	35,480	0	0.0%
<i>Agrarian/Rural</i>	4,922	0	0.0%
Younger Singles & Couples	740,070	40	33.3%
<i>Metropolitan Cities</i>	558,190	40	33.3%
<i>Metropolitan Suburbs</i>	166,170	0	0.0%
<i>Small Cities/Edge Cities</i>	14,765	0	0.0%
<i>Agrarian/Rural</i>	945	0	0.0%
Total:	2,594,712	120	100.0%
Total County Households:	3,207,175		
Classified Households As A Share Of Total County Households:	80.9%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

Los Angeles County, California

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	691,640	20	16.7%
<i>Metropolitan Cities</i>			
Urban Establishment	137,455	10	8.3%
Rowhouse Retirees	76,820	0	0.0%
<i>Subtotal:</i>	214,275	10	8.3%
<i>Metropolitan Suburbs</i>			
The Social Register	101,070	0	0.0%
Nouveau Money	110,275	10	8.3%
Post-War Suburban Pioneers	75,465	0	0.0%
Affluent Empty Nesters	82,585	0	0.0%
Blue-Collar Button-Downs	42,475	0	0.0%
Middle-American Retirees	37,895	0	0.0%
<i>Subtotal:</i>	449,765	10	8.3%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	8,280	0	0.0%
Active Retirees	17,160	0	0.0%
Blue-Collar Retirees	870	0	0.0%
<i>Subtotal:</i>	26,310	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	1,290	0	0.0%
<i>Subtotal:</i>	1,290	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Los Angeles County, California

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	1,163,002	60	50.0%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	234,930	10	8.3%
Multi-Cultural Families	229,835	10	8.3%
Black Urban Families	70,605	0	0.0%
Latino Urban Families	391,470	30	25.0%
<i>Subtotal:</i>	<u>926,840</u>	<u>50</u>	<u>41.7%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	88,465	10	8.3%
Kids 'r' Us	10,990	0	0.0%
<i>Subtotal:</i>	<u>99,455</u>	<u>10</u>	<u>8.3%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	20,110	0	0.0%
Unibox Transferees	64,635	0	0.0%
Mainstream Families	11,560	0	0.0%
<i>Subtotal:</i>	<u>96,305</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	16,600	0	0.0%
Full-Nest Exurbanites	8,420	0	0.0%
New-Town Families	1,960	0	0.0%
Pillars of the Community	4,650	0	0.0%
Middle-American Families	3,100	0	0.0%
Young Homesteaders	750	0	0.0%
<i>Subtotal:</i>	<u>35,480</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	3,582	0	0.0%
Small-Town Families	1,340	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>4,922</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Los Angeles County, California

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	740,070	40	33.3%
<i>Metropolitan Cities</i>			
Urban Elite	30,085	0	0.0%
e-Types	147,940	10	8.3%
Urban Achievers	176,765	10	8.3%
New Bohemians	203,400	20	16.7%
<i>Subtotal:</i>	<u>558,190</u>	<u>40</u>	<u>33.3%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	44,490	0	0.0%
Fast-Track Professionals	60,110	0	0.0%
Suburban Achievers	40,160	0	0.0%
Generation X	21,410	0	0.0%
<i>Subtotal:</i>	<u>166,170</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	4,345	0	0.0%
University/College Affiliates	10,420	0	0.0%
<i>Subtotal:</i>	<u>14,765</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	945	0	0.0%
<i>Subtotal:</i>	<u>945</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Jefferson County, Alabama

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	51,390	20	28.6%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	42,355	20	28.6%
<i>Small Cities/Edge Cities</i>	6,025	0	0.0%
<i>Town & Country/Exurbs</i>	3,010	0	0.0%
Traditional & Non-Traditional Families	63,510	20	28.6%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	3,595	0	0.0%
<i>Small Cities/Edge Cities</i>	6,160	0	0.0%
<i>Town & Country/Exurbs</i>	39,835	20	28.6%
<i>Agrarian/Rural</i>	13,920	0	0.0%
Younger Singles & Couples	40,820	30	42.9%
<i>Metropolitan Cities</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>	26,820	20	28.6%
<i>Small Cities/Edge Cities</i>	14,000	10	14.3%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	155,720	70	100.0%
Total County Households:	261,865		
Classified Households As A Share Of Total County Households:	59.5%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

Jefferson County, Alabama

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	51,390	20	28.6%
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0.0%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	5,010	0	0.0%
Nouveau Money	3,140	0	0.0%
Post-War Suburban Pioneers	9,960	10	14.3%
Affluent Empty Nesters	5,115	0	0.0%
Blue-Collar Button-Downs	5,730	0	0.0%
Middle-American Retirees	13,400	10	14.3%
<i>Subtotal:</i>	42,355	20	28.6%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	2,040	0	0.0%
Active Retirees	495	0	0.0%
Blue-Collar Retirees	3,490	0	0.0%
<i>Subtotal:</i>	6,025	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	3,010	0	0.0%
<i>Subtotal:</i>	3,010	0	0.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
Jefferson County, Alabama

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	63,510	20	28.6%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	0	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	1,600	0	0.0%
Kids 'r' Us	1,995	0	0.0%
<i>Subtotal:</i>	<u>3,595</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	2,310	0	0.0%
Unibox Transferees	1,310	0	0.0%
Mainstream Families	2,540	0	0.0%
<i>Subtotal:</i>	<u>6,160</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	2,420	0	0.0%
Full-Nest Exurbanites	2,185	0	0.0%
New-Town Families	17,485	10	14.3%
Pillars of the Community	0	0	0.0%
Mainstream Families	17,745	10	14.3%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>39,835</u>	<u>20</u>	<u>28.6%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,800	0	0.0%
Small-Town Families	5,895	0	0.0%
Rustic Families	6,225	0	0.0%
<i>Subtotal:</i>	<u>13,920</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Jefferson County, Alabama

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	40,820	30	42.9%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	0	0	0.0%
Urban Achievers	0	0	0.0%
New Bohemians	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	12,430	10	14.3%
Fast-Track Professionals	7,785	10	14.3%
Suburban Achievers	2,325	0	0.0%
Generation X	4,280	0	0.0%
Subtotal:	<u>26,820</u>	<u>20</u>	<u>28.6%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	10,995	10	14.3%
University/College Affiliates	3,005	0	0.0%
Subtotal:	<u>14,000</u>	<u>10</u>	<u>14.3%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

King County, Washington

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	220,590	0	0.0%
<i>Metropolitan Cities</i>	31,480	0	0.0%
<i>Metropolitan Suburbs</i>	178,915	0	0.0%
<i>Small Cities/Edge Cities</i>	9,105	0	0.0%
<i>Town & Country/Exurbs</i>	1,090	0	0.0%
Traditional & Non-Traditional Families	158,890	10	16.7%
<i>Metropolitan Cities</i>	8,735	0	0.0%
<i>Metropolitan Suburbs</i>	63,015	10	16.7%
<i>Small Cities/Edge Cities</i>	29,485	0	0.0%
<i>Town & Country/Exurbs</i>	52,645	0	0.0%
<i>Agrarian/Rural</i>	5,010	0	0.0%
Younger Singles & Couples	256,550	50	83.3%
<i>Metropolitan Cities</i>	105,940	10	16.7%
<i>Metropolitan Suburbs</i>	139,810	40	66.7%
<i>Small Cities/Edge Cities</i>	10,800	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	636,030	60	100.0%
Total County Households:	726,395		
Classified Households As A Share Of Total County Households:	87.6%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

King County, Washington

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	220,590	0	0.0%
<i>Metropolitan Cities</i>			
Urban Establishment	28,535	0	0.0%
Rowhouse Retirees	2,945	0	0.0%
<i>Subtotal:</i>	31,480	0	0.0%
<i>Metropolitan Suburbs</i>			
The Social Register	20,325	0	0.0%
Nouveau Money	26,935	0	0.0%
Post-War Suburban Pioneers	33,865	0	0.0%
Affluent Empty Nesters	42,115	0	0.0%
Blue-Collar Button-Downs	27,840	0	0.0%
Middle-American Retirees	27,835	0	0.0%
<i>Subtotal:</i>	178,915	0	0.0%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	885	0	0.0%
Active Retirees	7,930	0	0.0%
Blue-Collar Retirees	290	0	0.0%
<i>Subtotal:</i>	9,105	0	0.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	1,090	0	0.0%
<i>Subtotal:</i>	1,090	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

King County, Washington

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Traditional & Non-Traditional Families	158,890	10	16.7%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	2,515	0	0.0%
Multi-Cultural Families	2,520	0	0.0%
Black Urban Families	3,700	0	0.0%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>8,735</u>	<u>0</u>	<u>0.0%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	50,460	10	16.7%
Kids 'r' Us	12,555	0	0.0%
<i>Subtotal:</i>	<u>63,015</u>	<u>10</u>	<u>16.7%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	6,975	0	0.0%
Unibox Transferees	15,315	0	0.0%
Mainstream Families	7,195	0	0.0%
<i>Subtotal:</i>	<u>29,485</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	18,885	0	0.0%
Full-Nest Exurbanites	19,910	0	0.0%
New-Town Families	8,295	0	0.0%
Pillars of the Community	1,210	0	0.0%
Middle-American Families	3,615	0	0.0%
Young Homesteaders	730	0	0.0%
<i>Subtotal:</i>	<u>52,645</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	3,770	0	0.0%
Small-Town Families	935	0	0.0%
Rustic Families	305	0	0.0%
<i>Subtotal:</i>	<u>5,010</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
King County, Washington

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	256,550	50	83.3%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	20,300	0	0.0%
Urban Achievers	37,525	0	0.0%
New Bohemians	48,115	10	16.7%
Subtotal:	<u>105,940</u>	<u>10</u>	<u>16.7%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	29,985	10	16.7%
Fast-Track Professionals	29,895	10	16.7%
Suburban Achievers	49,535	10	16.7%
Generation X	30,395	10	16.7%
Subtotal:	<u>139,810</u>	<u>40</u>	<u>66.7%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	1,295	0	0.0%
University/College Affiliates	9,505	0	0.0%
Subtotal:	<u>10,800</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
Subtotal:	<u>0</u>	<u>0</u>	<u>0.0%</u>

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
All Other U.S. Counties

Household Type/ Geographic Designation	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees	480	27.4%
<i>Metropolitan Cities</i>	40	2.3%
<i>Metropolitan Suburbs</i>	270	15.4%
<i>Small Cities/Edge Cities</i>	170	9.7%
<i>Town & Country/Exurbs</i>	0	0.0%
Traditional & Non-Traditional Families	780	44.6%
<i>Metropolitan Cities</i>	130	7.4%
<i>Metropolitan Suburbs</i>	140	8.0%
<i>Small Cities/Edge Cities</i>	160	9.1%
<i>Town & Country/Exurbs</i>	350	20.0%
<i>Agrarian/Rural</i>	0	0.0%
Younger Singles & Couples	490	28.0%
<i>Metropolitan Cities</i>	140	8.0%
<i>Metropolitan Suburbs</i>	220	12.6%
<i>Small Cities/Edge Cities</i>	100	5.7%
<i>Agrarian/Rural</i>	30	1.7%
Total:	1,750	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups
All Other U.S. Counties

	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	480	27.4%
<i>Metropolitan Cities</i>		
Urban Establishment	20	1.1%
Rowhouse Retirees	20	1.1%
<i>Subtotal:</i>	40	2.3%
<i>Metropolitan Suburbs</i>		
The Social Register	20	1.1%
Nouveau Money	50	2.9%
Post-War Suburban Pioneers	40	2.3%
Affluent Empty Nesters	60	3.4%
Blue-Collar Button-Downs	50	2.9%
Middle-American Retirees	50	2.9%
<i>Subtotal:</i>	270	15.4%
<i>Small Cities/Edge Cities</i>		
Middle-Class Move-Downs	60	3.4%
Active Retirees	60	3.4%
Blue-Collar Retirees	50	2.9%
<i>Subtotal:</i>	170	9.7%
<i>Town & Country/Exurbs</i>		
Mainstream Retirees	0	0.0%
<i>Subtotal:</i>	0	0.0%

Households With The Potential To Move To The City Of Atlanta In 2003

Household Classification By Market Groups

All Other U.S. Counties

	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	780	44.6%
<i>Metropolitan Cities</i>		
Full-Nest Urbanites	30	1.7%
Multi-Cultural Families	30	1.7%
Black Urban Families	30	1.7%
Latino Urban Families	40	2.3%
<i>Subtotal:</i>	<u>130</u>	<u>7.4%</u>
<i>Metropolitan Suburbs</i>		
Full-Nest Suburbanites	100	5.7%
Kids 'r' Us	40	2.3%
<i>Subtotal:</i>	<u>140</u>	<u>8.0%</u>
<i>Small Cities/Edge Cities</i>		
Cosmopolitan Families	40	2.3%
Unibox Transferees	70	4.0%
Mainstream Families	50	2.9%
<i>Subtotal:</i>	<u>160</u>	<u>9.1%</u>
<i>Town & Country/Exurbs</i>		
Exurban Elite	50	2.9%
Full-Nest Exurbanites	90	5.1%
New-Town Families	50	2.9%
Pillars of the Community	40	2.3%
Middle-American Families	70	4.0%
Young Homesteaders	50	2.9%
<i>Subtotal:</i>	<u>350</u>	<u>20.0%</u>
<i>Agrarian/Rural</i>		
Heartland Families	0	0.0%
Small-Town Families	0	0.0%
Rustic Families	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;

Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups

All Other U.S. Counties

	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	490	28.0%
<i>Metropolitan Cities</i>		
Urban Elite	10	0.6%
e-Types	30	1.7%
Urban Achievers	50	2.9%
New Bohemians	50	2.9%
Subtotal:	<u>140</u>	<u>8.0%</u>
<i>Metropolitan Suburbs</i>		
The VIPs	50	2.9%
Fast-Track Professionals	60	3.4%
Suburban Achievers	50	2.9%
Generation X	60	3.4%
Subtotal:	<u>220</u>	<u>12.6%</u>
<i>Small Cities/Edge Cities</i>		
Twentysomethings	40	2.3%
University/College Affiliates	60	3.4%
Subtotal:	<u>100</u>	<u>5.7%</u>
<i>Agrarian/Rural</i>		
PC Pioneers	30	1.7%
Subtotal:	<u>30</u>	<u>1.7%</u>

**Draw Area Households In Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 39 Through 43

Cook County, IL; Los Angeles County, CA; Jefferson County, AL; King County, WA; All Other U.S. Counties

<u>Household Type/ Geographic Designation</u>	<u>Cook County</u>	<u>Los Angeles County</u>	<u>Jefferson County</u>	<u>King County</u>	<u>All Other US Counties</u>	<u>Total</u>
Empty Nesters & Retirees	60	20	20	0	480	580
<i>Metropolitan Cities</i>	20	10	0	0	40	70
<i>Metropolitan Suburbs</i>	40	10	20	0	270	340
<i>Small Cities/Edge Cities</i>	0	0	0	0	170	170
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	70	60	20	10	780	940
<i>Metropolitan Cities</i>	60	50	0	0	130	240
<i>Metropolitan Suburbs</i>	10	10	0	10	140	170
<i>Small Cities/Edge Cities</i>	0	0	0	0	160	160
<i>Town & Country/Exurbs</i>	0	0	20	0	350	370
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Younger Singles & Couples	70	40	30	50	490	680
<i>Metropolitan Cities</i>	60	40	0	10	140	250
<i>Metropolitan Suburbs</i>	10	0	20	40	220	290
<i>Small Cities/Edge Cities</i>	0	0	10	0	100	110
<i>Agrarian/Rural</i>	0	0	0	0	30	30
Total:	200	120	70	60	1,750	2,200
Percent:	9.1%	5.5%	3.2%	2.7%	79.5%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 39 Through 43

Cook County, IL; Los Angeles County, CA; Jefferson County, AL; King County, WA; All Other U.S. Counties

	<u>Cook County</u>	<u>Los Angeles County</u>	<u>Jefferson County</u>	<u>King County</u>	<u>All Other US Counties</u>	<u>Total</u>
Empty Nesters & Retirees	60	20	20	0	480	580
<i>Metropolitan Cities</i>						
Urban Establishment	10	10	0	0	20	40
Rowhouse Retirees	10	0	0	0	20	30
Subtotal:	20	10	0	0	40	70
<i>Metropolitan Suburbs</i>						
The Social Register	0	0	0	0	20	20
Nouveau Money	10	10	0	0	50	70
Post-War Suburban Pioneers	10	0	10	0	40	60
Affluent Empty Nesters	10	0	0	0	60	70
Blue-Collar Button-Downs	10	0	0	0	50	60
Middle-American Retirees	0	0	10	0	50	60
Subtotal:	40	10	20	0	270	340
<i>Small Cities/Edge Cities</i>						
Middle-Class Move-Downs	0	0	0	0	60	60
Active Retirees	0	0	0	0	60	60
Blue-Collar Retirees	0	0	0	0	50	50
Subtotal:	0	0	0	0	170	170
<i>Town & Country/Exurbs</i>						
Mainstream Retirees	0	0	0	0	0	0
Subtotal:	0	0	0	0	0	0

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 39 Through 43

Cook County, IL; Los Angeles County, CA; Jefferson County, AL; King County, WA; All Other U.S. Counties

	<u>Cook County</u>	<u>Los Angeles County</u>	<u>Jefferson County</u>	<u>King County</u>	<u>All Other US Counties</u>	<u>Total</u>
Traditional & Non-Traditional Families	70	60	20	10	780	940
<i>Metropolitan Cities</i>						
Full-Nest Urbanites	10	10	0	0	30	50
Multi-Cultural Families	0	10	0	0	30	40
Black Urban Families	20	0	0	0	30	50
Latino Urban Families	30	30	0	0	40	100
<i>Subtotal:</i>	<u>60</u>	<u>50</u>	<u>0</u>	<u>0</u>	<u>130</u>	<u>240</u>
<i>Metropolitan Suburbs</i>						
Full-Nest Suburbanites	10	10	0	10	100	130
Kids 'r' Us	0	0	0	0	40	40
<i>Subtotal:</i>	<u>10</u>	<u>10</u>	<u>0</u>	<u>10</u>	<u>140</u>	<u>170</u>
<i>Small Cities/Edge Cities</i>						
Cosmopolitan Families	0	0	0	0	40	40
Unibox Transferees	0	0	0	0	70	70
Mainstream Families	0	0	0	0	50	50
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>160</u>	<u>160</u>
<i>Town & Country/Exurbs</i>						
Exurban Elite	0	0	0	0	50	50
Full-Nest Exurbanites	0	0	0	0	90	90
New-Town Families	0	0	10	0	50	60
Pillars of the Community	0	0	0	0	40	40
Middle-American Families	0	0	10	0	70	80
Young Homesteaders	0	0	0	0	50	50
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>20</u>	<u>0</u>	<u>350</u>	<u>370</u>
<i>Agrarian/Rural</i>						
Heartland Families	0	0	0	0	0	0
Small-Town Families	0	0	0	0	0	0
Rustic Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 39 Through 43

Cook County, IL; Los Angeles County, CA; Jefferson County, AL; King County, WA; All Other U.S. Counties

	<u>Cook County</u>	<u>Los Angeles County</u>	<u>Jefferson County</u>	<u>King County</u>	<u>All Other US Counties</u>	<u>Total</u>
Younger Singles & Couples	70	40	30	50	490	680
<i>Metropolitan Cities</i>						
Urban Elite	10	0	0	0	10	20
e-Types	10	10	0	0	30	50
Urban Achievers	10	10	0	0	50	70
New Bohemians	30	20	0	10	50	110
Subtotal:	<u>60</u>	<u>40</u>	<u>0</u>	<u>10</u>	<u>140</u>	<u>250</u>
<i>Metropolitan Suburbs</i>						
The VIPs	0	0	10	10	50	70
Fast-Track Professionals	0	0	10	10	60	80
Suburban Achievers	10	0	0	10	50	70
Generation X	0	0	0	10	60	70
Subtotal:	<u>10</u>	<u>0</u>	<u>20</u>	<u>40</u>	<u>220</u>	<u>290</u>
<i>Small Cities/Edge Cities</i>						
Twentysomethings	0	0	10	0	40	50
University/College Affiliates	0	0	0	0	60	60
Subtotal:	<u>0</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>100</u>	<u>110</u>
<i>Agrarian/Rural</i>						
PC Pioneers	0	0	0	0	30	30
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>30</u>	<u>30</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

ZIMMERMAN/VOLK ASSOCIATES, INC.

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Research & Strategic Analysis

ASSUMPTIONS AND LIMITATIONS—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the methodology employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.



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Research & Strategic Analysis

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Appendix One

TARGET MARKET TABLES

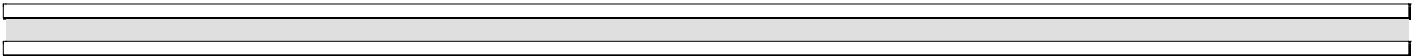
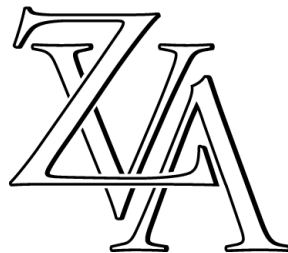
MARKET POSITION ANALYSIS

JSA-McGill LCI Study Area

Downtown Atlanta
City of Atlanta, Georgia

December 18, 2003

Conducted by
ZIMMERMAN / VOLK ASSOCIATES, INC.
6 East Main Street
Clinton, New Jersey 08809



Gross Annual Household In-Migration*Fulton County, Georgia***1997, 1998, 1999, 2000, 2001**

County of Origin	..... 1997 .....		..... 1998 .....		..... 1999 .....		..... 2000 .....		..... 2001	
	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share
De Kalb	8,245	20.3%	8,205	20.0%	7,925	19.2%	8,220	20.8%	8,235	21.1%
Cobb	4,330	10.7%	4,115	10.0%	4,155	10.1%	4,265	10.8%	3,990	10.2%
Gwinnett	2,675	6.6%	2,690	6.6%	2,515	6.1%	2,555	6.5%	2,540	6.5%
Clayton	1,875	4.6%	1,950	4.7%	1,835	4.5%	1,995	5.1%	2,155	5.5%
APO/FPO/Foreign	1,495	3.7%	2,110	5.1%	3,035	7.4%	1,345	3.4%	1,400	3.6%
Forsyth	265	0.7%	440	1.1%	470	1.1%	575	1.5%	565	1.4%
Cherokee	340	0.8%	400	1.0%	420	1.0%	440	1.1%	515	1.3%
Fayette	280	0.7%	330	0.8%	275	0.7%	330	0.8%	350	0.9%
Cook, IL	470	1.2%	450	1.1%	430	1.0%	385	1.0%	345	0.9%
Douglas	210	0.5%	250	0.6%	245	0.6%	295	0.7%	300	0.8%
Broward, FL	300	0.7%	320	0.8%	310	0.8%	265	0.7%	265	0.7%
Los Angeles, CA	240	0.6%	270	0.7%	245	0.6%	265	0.7%	260	0.7%
Coweta	215	0.5%	215	0.5%	210	0.5%	210	0.5%	250	0.6%
Clarke	275	0.7%	285	0.7%	285	0.7%	280	0.7%	275	0.7%
Miami Dade, FL	290	0.7%	320	0.8%	310	0.8%	275	0.7%	250	0.6%
Mecklenburg, NC	285	0.7%	275	0.7%	280	0.7%	270	0.7%	230	0.6%
Henry	170	0.4%	175	0.4%	175	0.4%	215	0.5%	225	0.6%
New York, NY	185	0.5%	195	0.5%	205	0.5%	210	0.5%	195	0.5%
Jefferson, AL	230	0.6%	230	0.6%	245	0.6%	225	0.6%	195	0.5%
Dallas, TX	235	0.6%	215	0.5%	260	0.6%	195	0.5%	185	0.5%
Orange, FL	230	0.6%	235	0.6%	245	0.6%	205	0.5%	195	0.5%
Duval, FL	180	0.4%	235	0.6%	235	0.6%	220	0.6%	190	0.5%
Hillsborough, FL	260	0.6%	220	0.5%	255	0.6%	215	0.5%	175	0.4%
Palm Beach, FL	220	0.5%	215	0.5%	220	0.5%	185	0.5%	170	0.4%
Muscogee	155	0.4%	170	0.4%	160	0.4%	190	0.5%	170	0.4%
Chatham	225	0.6%	175	0.4%	170	0.4%	190	0.5%	165	0.4%
Shelby, TN	175	0.4%	165	0.4%	180	0.4%	155	0.4%	160	0.4%
Harris, TX	215	0.5%	215	0.5%	205	0.5%	195	0.5%	160	0.4%
Davidson, TN	190	0.5%	180	0.4%	205	0.5%	230	0.6%	155	0.4%
Wake, NC	155	0.4%	165	0.4%	160	0.4%	185	0.5%	150	0.4%
Kings, NY	140	0.3%	105	0.3%	135	0.3%	130	0.3%	140	0.4%
Bibb	160	0.4%	125	0.3%	140	0.3%	140	0.4%	135	0.3%
Hall	110	0.3%	120	0.3%	125	0.3%	135	0.3%	130	0.3%
King, WA	90	0.2%	85	0.2%	105	0.3%	85	0.2%	125	0.3%
Rockdale	120	0.3%	125	0.3%	115	0.3%	130	0.3%	125	0.3%
All Other Counties	15,285	37.7%	15,090	36.7%	14,695	35.7%	14,045	35.6%	14,010	35.8%
Total In-Migration:	40,520	100.0%	41,065	100.0%	41,180	100.0%	39,450	100.0%	39,080	100.0%

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;
Zimmerman/Volk Associates, Inc.

Gross Annual Household Out-Migration*Fulton County, Georgia***1997, 1998, 1999, 2000, 2001**

Destination County	..... 1997 .....		..... 1998 .....		..... 1999 .....		..... 2000 .....		..... 2001	
	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share
De Kalb	8,445	22.4%	8,660	22.4%	9,140	22.6%	8,425	21.6%	8,515	21.6%
Cobb	4,465	11.8%	4,770	12.3%	5,000	12.4%	4,640	11.9%	4,865	12.3%
Gwinnett	2,690	7.1%	2,895	7.5%	3,010	7.5%	2,600	6.7%	2,770	7.0%
Clayton	3,240	8.6%	3,335	8.6%	3,735	9.3%	3,655	9.4%	3,540	9.0%
APO/FPO/Foreign	305	0.8%	320	0.8%	340	0.8%	325	0.8%	400	1.0%
Forsyth	2,010	5.3%	1,695	4.4%	1,560	3.9%	1,370	3.5%	1,475	3.7%
Cherokee	1,115	3.0%	1,125	2.9%	1,135	2.8%	1,165	3.0%	1,255	3.2%
Fayette	415	1.1%	440	1.1%	400	1.0%	385	1.0%	405	1.0%
Cook, IL	275	0.7%	310	0.8%	290	0.7%	305	0.8%	310	0.8%
Douglas	415	1.1%	400	1.0%	435	1.1%	475	1.2%	515	1.3%
Broward, FL	185	0.5%	210	0.5%	190	0.5%	225	0.6%	215	0.5%
Los Angeles, CA	290	0.8%	295	0.8%	325	0.8%	300	0.8%	280	0.7%
Coweta	355	0.9%	345	0.9%	375	0.9%	350	0.9%	365	0.9%
Clarke	150	0.4%	115	0.3%	175	0.4%	145	0.4%	160	0.4%
Miami Dade, FL	150	0.4%	165	0.4%	195	0.5%	190	0.5%	225	0.6%
Mecklenburg, NC	200	0.5%	210	0.5%	195	0.5%	220	0.6%	245	0.6%
Henry	355	0.9%	370	1.0%	400	1.0%	435	1.1%	515	1.3%
New York, NY	255	0.7%	280	0.7%	305	0.8%	340	0.9%	245	0.6%
Jefferson, AL	135	0.4%	110	0.3%	115	0.3%	115	0.3%	125	0.3%
Dallas, TX	180	0.5%	170	0.4%	175	0.4%	165	0.4%	135	0.3%
Orange, FL	165	0.4%	150	0.4%	140	0.3%	145	0.4%	140	0.4%
Duval, FL	125	0.3%	135	0.3%	140	0.3%	135	0.3%	160	0.4%
Hillsborough, FL	175	0.5%	195	0.5%	180	0.4%	215	0.6%	155	0.4%
Palm Beach, FL	120	0.3%	130	0.3%	135	0.3%	140	0.4%	160	0.4%
Muscogee	95	0.3%	85	0.2%	75	0.2%	60	0.2%	75	0.2%
Chatham	120	0.3%	145	0.4%	140	0.3%	125	0.3%	145	0.4%
Shelby, TN	110	0.3%	95	0.2%	95	0.2%	95	0.2%	100	0.3%
Harris, TX	180	0.5%	160	0.4%	165	0.4%	170	0.4%	180	0.5%
Davidson, TN	135	0.4%	115	0.3%	145	0.4%	115	0.3%	105	0.3%
Wake, NC	95	0.3%	115	0.3%	115	0.3%	100	0.3%	105	0.3%
Kings, NY	95	0.3%	80	0.2%	105	0.3%	140	0.4%	105	0.3%
Bibb	85	0.2%	80	0.2%	75	0.2%	80	0.2%	70	0.2%
Hall	165	0.4%	155	0.4%	195	0.5%	195	0.5%	170	0.4%
King, WA	115	0.3%	125	0.3%	135	0.3%	140	0.4%	100	0.3%
Rockdale	115	0.3%	110	0.3%	140	0.3%	130	0.3%	140	0.4%
All Other Counties	10,185	27.0%	10,615	27.4%	10,895	27.0%	11,140	28.6%	11,005	27.9%
Total Out-Migration:	37,710	100.0%	38,710	100.0%	40,370	100.0%	38,955	100.0%	39,475	100.0%

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;
Zimmerman/Volk Associates, Inc.

Net Annual Household Migration*Fulton County, Georgia***1997, 1998, 1999, 2000, 2001**

<u>County</u>	<u>..... 1997</u> <u>Number</u>	<u>..... 1998</u> <u>Number</u>	<u>..... 1999</u> <u>Number</u>	<u>..... 2000</u> <u>Number</u>	<u>..... 2001</u> <u>Number</u>
De Kalb	-200	-455	-1,215	-205	-280
Cobb	-135	-655	-845	-375	-875
Gwinnett	-15	-205	-495	-45	-230
Clayton	-1,365	-1,385	-1,900	-1,660	-1,385
APO/FPO/Foreign	1,190	1,790	2,695	1,020	1,000
Forsyth	-1,745	-1,255	-1,090	-795	-910
Cherokee	-775	-725	-715	-725	-740
Fayette	-135	-110	-125	-55	-55
Cook, IL	195	140	140	80	35
Douglas	-205	-150	-190	-180	-215
Broward, FL	115	110	120	40	50
Los Angeles, CA	-50	-25	-80	-35	-20
Coweta	-140	-130	-165	-140	-115
Clarke	125	170	110	135	115
Miami Dade, FL	140	155	115	85	25
Mecklenburg, NC	85	65	85	50	-15
Henry	-185	-195	-225	-220	-290
New York, NY	-70	-85	-100	-130	-50
Jefferson, AL	95	120	130	110	70
Dallas, TX	55	45	85	30	50
Orange, FL	65	85	105	60	55
Duval, FL	55	100	95	85	30
Hillsborough, FL	85	25	75	0	20
Palm Beach, FL	100	85	85	45	10
Muscogee	60	85	85	130	95
Chatham	105	30	30	65	20
Shelby, TN	65	70	85	60	60
Harris, TX	35	55	40	25	-20
Davidson, TN	55	65	60	115	50
Wake, NC	60	50	45	85	45
Kings, NY	45	25	30	-10	35
Bibb	75	45	65	60	65
Hall	-55	-35	-70	-60	-40
King, WA	-25	-40	-30	-55	25
Rockdale	5	15	-25	0	-15
All Other Counties	5,100	4,475	3,800	2,905	3,005
Total Net Migration:	2,810	2,355	810	495	-395

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
City of Atlanta, Fulton and DeKalb Counties, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Estimated Share</i>
Empty Nesters & Retirees	24,610	27.2%
<i>Metropolitan Cities</i>	1,090	1.2%
<i>Metropolitan Suburbs</i>	22,130	24.4%
<i>Small Cities/Edge Cities</i>	1,390	1.5%
<i>Town & Country/Exurbs</i>	0	0.0%
Traditional & Non-Traditional Families	8,665	9.6%
<i>Metropolitan Cities</i>	8,665	9.6%
<i>Metropolitan Suburbs</i>	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0.0%
<i>Town & Country/Exurbs</i>	0	0.0%
<i>Agrarian/Rural</i>	0	0.0%
Younger Singles & Couples	57,330	63.3%
<i>Metropolitan Cities</i>	23,655	26.1%
<i>Metropolitan Suburbs</i>	30,950	34.2%
<i>Small Cities/Edge Cities</i>	2,725	3.0%
<i>Agrarian/Rural</i>	0	0.0%
Total:	90,605	100.0%
Total City Households:	171,860	
Classified Households As A Share Of Total City Households:	52.7%	
Estimated Median Income:	\$39,200	
Estimated National Median Income:	\$44,400	
Estimated Median Home Value:	\$148,400	
Estimated National Median Home Value:	\$127,700	

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups

City of Atlanta, Fulton and DeKalb Counties, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Empty Nesters & Retirees	24,610	27.2%		
<i>Metropolitan Cities</i>				
Urban Establishment	590	0.7%	\$86,100	\$333,300
Rowhouse Retirees	500	0.6%	\$44,800	\$261,800
<i>Subtotal:</i>	<u>1,090</u>	<u>1.2%</u>		
<i>Metropolitan Suburbs</i>				
The Social Register	5,615	6.2%	\$179,100	\$551,000
Nouveau Money	3,140	3.5%	\$116,200	\$386,000
Post-War Suburban Pioneers	3,405	3.8%	\$83,700	\$273,400
Affluent Empty Nesters	270	0.3%	\$68,800	\$180,400
Blue-Collar Button-Downs	6,035	6.7%	\$61,100	\$128,600
Middle-American Retirees	3,665	4.0%	\$43,800	\$128,000
<i>Subtotal:</i>	<u>22,130</u>	<u>24.4%</u>		
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	0	0.0%		
Active Retirees	1,390	1.5%	\$49,700	\$205,200
Blue-Collar Retirees	0	0.0%		
<i>Subtotal:</i>	<u>1,390</u>	<u>1.5%</u>		
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups

City of Atlanta, Fulton and DeKalb Counties, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Traditional & Non-Traditional Families	8,665	9.6%		
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	80	0.1%	\$76,400	\$373,900
Multi-Cultural Families	0	0.0%		
Black Urban Families	8,585	9.5%	\$43,300	\$127,900
Latino Urban Families	0	0.0%		
<i>Subtotal:</i>	<u>8,665</u>	<u>9.6%</u>		
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	0	0.0%		
Kids 'r' Us	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	0	0.0%		
Unibox Transferees	0	0.0%		
Mainstream Families	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		
<i>Town & Country/Exurbs</i>				
Exurban Elite	0	0.0%		
Full-Nest Exurbanites	0	0.0%		
New-Town Families	0	0.0%		
Pillars of the Community	0	0.0%		
Middle-American Families	0	0.0%		
Young Homesteaders	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		
<i>Agrarian/Rural</i>				
Heartland Families	0	0.0%		
Small-Town Families	0	0.0%		
Rustic Families	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups

City of Atlanta, Fulton and DeKalb Counties, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Younger Single & Couples	57,330	63.3%		
<i>Metropolitan Cities</i>				
Urban Elite	1,040	1.1%	\$95,200	\$818,300
e-Types	7,745	8.5%	\$82,200	\$421,800
Urban Achievers	980	1.1%	\$52,400	\$223,500
New Bohemians	13,890	15.3%	\$50,200	\$309,300
Subtotal:	23,655	26.1%		
<i>Metropolitan Suburbs</i>				
The VIPs	11,380	12.6%	\$88,900	\$273,000
Fast-Track Professionals	11,220	12.4%	\$67,100	\$228,200
Suburban Achievers	510	0.6%	\$50,200	\$163,100
Generation X	7,840	8.7%	\$43,800	\$137,000
Subtotal:	30,950	34.2%		
<i>Small Cities/Edge Cities</i>				
Twentysomethings	0	0.0%		
University / College Affiliates	2,725	3.0%	\$45,700	\$126,500
Subtotal:	2,725	3.0%		
<i>Agrarian/Rural</i>				
PC Pioneers	0	0.0%		
Subtotal:	0	0.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
Fulton County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Estimated Share</i>
Empty Nesters & Retirees	88,090	36.0%
<i>Metropolitan Cities</i>	500	0.2%
<i>Metropolitan Suburbs</i>	83,960	34.3%
<i>Small Cities/Edge Cities</i>	3,630	1.5%
<i>Town & Country/Exurbs</i>	0	0.0%
Traditional & Non-Traditional Families	39,445	16.1%
<i>Metropolitan Cities</i>	6,760	2.8%
<i>Metropolitan Suburbs</i>	7,100	2.9%
<i>Small Cities/Edge Cities</i>	0	0.0%
<i>Town & Country/Exurbs</i>	23,030	9.4%
<i>Agrarian/Rural</i>	2,555	1.0%
Younger Singles & Couples	117,010	47.8%
<i>Metropolitan Cities</i>	20,510	8.4%
<i>Metropolitan Suburbs</i>	93,705	38.3%
<i>Small Cities/Edge Cities</i>	2,795	1.1%
<i>Agrarian/Rural</i>	0	0.0%
Total:	244,545	100.0%
Total County Households:	340,470	
Classified Households As A Share Of Total County Households:	71.8%	
Estimated Median Income:	\$52,500	
Estimated National Median Income:	\$44,400	
Estimated Median Home Value:	\$205,600	
Estimated National Median Home Value:	\$127,700	

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
Fulton County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Empty Nesters & Retirees	88,090	36.0%		
<i>Metropolitan Cities</i>				
Urban Establishment	0	0.0%		
Rowhouse Retirees	500	0.2%	\$44,800	\$261,800
<i>Subtotal:</i>	<u>500</u>	<u>0.2%</u>		
<i>Metropolitan Suburbs</i>				
The Social Register	25,545	10.4%	\$176,100	\$763,400
Nouveau Money	24,865	10.2%	\$117,500	\$534,700
Post-War Suburban Pioneers	7,195	2.9%	\$86,900	\$378,800
Affluent Empty Nesters	5,205	2.1%	\$66,600	\$250,000
Blue-Collar Button-Downs	10,770	4.4%	\$61,500	\$178,200
Middle-American Retirees	10,380	4.2%	\$46,100	\$177,400
<i>Subtotal:</i>	<u>83,960</u>	<u>34.3%</u>		
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	0	0.0%		
Active Retirees	3,630	1.5%	\$54,200	\$284,300
Blue-Collar Retirees	0	0.0%		
<i>Subtotal:</i>	<u>3,630</u>	<u>1.5%</u>		
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
Fulton County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Traditional & Non-Traditional Families	39,445	16.1%		
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	80	0.0%	\$76,400	\$373,900
Multi-Cultural Families	0	0.0%		
Black Urban Families	6,680	2.7%	\$45,300	\$177,200
Latino Urban Families	0	0.0%		
<i>Subtotal:</i>	<u>6,760</u>	<u>2.8%</u>		
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	7,100	2.9%	\$89,300	\$293,000
Kids 'r' Us	0	0.0%		
<i>Subtotal:</i>	<u>7,100</u>	<u>2.9%</u>		
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	0	0.0%		
Unibox Transferees	0	0.0%		
Mainstream Families	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		
<i>Town & Country/Exurbs</i>				
Exurban Elite	7,250	3.0%	\$115,300	\$456,400
Full-Nest Exurbanites	10,315	4.2%	\$84,600	\$278,600
New-Town Families	1,145	0.5%	\$68,500	\$205,400
Pillars of the Community	0	0.0%		
Middle-American Families	4,320	1.8%	\$53,800	\$139,300
Young Homesteaders	0	0.0%		
<i>Subtotal:</i>	<u>23,030</u>	<u>9.4%</u>		
<i>Agrarian/Rural</i>				
Heartland Families	1,750	0.7%	\$66,800	\$204,800
Small-Town Families	805	0.3%	\$51,700	\$128,500
Rustic Families	0	0.0%		
<i>Subtotal:</i>	<u>2,555</u>	<u>1.0%</u>		

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
Fulton County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Younger Single & Couples	117,010	47.8%		
<i>Metropolitan Cities</i>				
Urban Elite	1,040	0.4%	\$95,200	\$818,300
e-Types	5,880	2.4%	\$82,100	\$584,400
Urban Achievers	565	0.2%	\$51,800	\$309,600
New Bohemians	13,025	5.3%	\$49,900	\$428,600
Subtotal:	20,510	8.4%		
<i>Metropolitan Suburbs</i>				
The VIPs	24,245	9.9%	\$88,700	\$378,200
Fast-Track Professionals	35,840	14.7%	\$67,000	\$316,100
Suburban Achievers	16,510	6.8%	\$60,100	\$225,900
Generation X	17,110	7.0%	\$46,100	\$189,800
Subtotal:	93,705	38.3%		
<i>Small Cities/Edge Cities</i>				
Twentysomethings	0	0.0%		
University / College Affiliates	2,795	1.1%	\$45,500	\$175,200
Subtotal:	2,795	1.1%		
<i>Agrarian/Rural</i>				
PC Pioneers	0	0.0%		
Subtotal:	0	0.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
De Kalb County, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Estimated Share</i>
Empty Nesters & Retirees	62,190	29.1%
<i>Metropolitan Cities</i>	1,125	0.5%
<i>Metropolitan Suburbs</i>	58,940	27.6%
<i>Small Cities/Edge Cities</i>	2,125	1.0%
<i>Town & Country/Exurbs</i>	0	0.0%
Traditional & Non-Traditional Families	40,285	18.8%
<i>Metropolitan Cities</i>	5,935	2.8%
<i>Metropolitan Suburbs</i>	32,065	15.0%
<i>Small Cities/Edge Cities</i>	0	0.0%
<i>Town & Country/Exurbs</i>	2,285	1.1%
<i>Agrarian/Rural</i>	0	0.0%
Younger Singles & Couples	111,265	52.1%
<i>Metropolitan Cities</i>	5,290	2.5%
<i>Metropolitan Suburbs</i>	104,060	48.7%
<i>Small Cities/Edge Cities</i>	1,915	0.9%
<i>Agrarian/Rural</i>	0	0.0%
Total:	213,740	100.0%
Total County Households:	261,535	
Classified Households As A Share Of Total County Households:	81.7%	
Estimated Median Income:	\$53,100	
Estimated National Median Income:	\$44,400	
Estimated Median Home Value:	\$147,200	
Estimated National Median Home Value:	\$127,700	

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups

De Kalb County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Empty Nesters & Retirees	62,190	29.1%		
<i>Metropolitan Cities</i>				
Urban Establishment	1,125	0.5%	\$88,400	\$330,600
Rowhouse Retirees	0	0.0%		
<i>Subtotal:</i>	1,125	0.5%		
<i>Metropolitan Suburbs</i>				
The Social Register	9,090	4.3%	\$178,100	\$546,600
Nouveau Money	10,535	4.9%	\$118,800	\$382,800
Post-War Suburban Pioneers	13,420	6.3%	\$87,900	\$271,200
Affluent Empty Nesters	10,335	4.8%	\$67,300	\$179,000
Blue-Collar Button-Downs	6,725	3.1%	\$62,200	\$127,600
Middle-American Retirees	8,835	4.1%	\$46,600	\$127,000
<i>Subtotal:</i>	58,940	27.6%		
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	0	0.0%		
Active Retirees	2,125	1.0%	\$54,800	\$203,600
Blue-Collar Retirees	0	0.0%		
<i>Subtotal:</i>	2,125	1.0%		
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0.0%		
<i>Subtotal:</i>	0	0.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
De Kalb County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Traditional & Non-Traditional Families	40,285	18.8%		
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	0	0.0%		
Multi-Cultural Families	0	0.0%		
Black Urban Families	5,935	2.8%	\$45,900	\$126,900
Latino Urban Families	0	0.0%		
<i>Subtotal:</i>	<u>5,935</u>	<u>2.8%</u>		
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	29,265	13.7%	\$90,300	\$209,800
Kids 'r' Us	2,800	1.3%	\$67,100	\$134,300
<i>Subtotal:</i>	<u>32,065</u>	<u>15.0%</u>		
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	0	0.0%		
Unibox Transferees	0	0.0%		
Mainstream Families	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		
<i>Town & Country/Exurbs</i>				
Exurban Elite	0	0.0%		
Full-Nest Exurbanites	1,185	0.6%	\$85,600	\$199,500
New-Town Families	695	0.3%	\$69,300	\$147,100
Pillars of the Community	0	0.0%		
Middle-American Families	405	0.2%	\$54,400	\$99,700
Young Homesteaders	0	0.0%		
<i>Subtotal:</i>	<u>2,285</u>	<u>1.1%</u>		
<i>Agrarian/Rural</i>				
Heartland Families	0	0.0%		
Small-Town Families	0	0.0%		
Rustic Families	0	0.0%		
<i>Subtotal:</i>	<u>0</u>	<u>0.0%</u>		

SOURCE: Claritas, Inc.;
 Zimmerman/Volk Associates, Inc.

2003 Household Classification By Market Groups
De Kalb County, Georgia

	<u>Estimated Number</u>	<u>Estimated Share</u>	<u>Estimated Median Income</u>	<u>Estimated Median Home Value</u>
Younger Single & Couples	111,265	52.1%		
<i>Metropolitan Cities</i>				
Urban Elite	0	0.0%		
e-Types	2,500	1.2%	\$83,100	\$418,400
Urban Achievers	670	0.3%	\$52,400	\$221,600
New Bohemians	2,120	1.0%	\$50,400	\$306,800
Subtotal:	5,290	2.5%		
<i>Metropolitan Suburbs</i>				
The VIPs	6,605	3.1%	\$89,800	\$270,800
Fast-Track Professionals	37,215	17.4%	\$67,700	\$226,300
Suburban Achievers	23,835	11.2%	\$60,800	\$161,800
Generation X	36,405	17.0%	\$46,600	\$135,900
Subtotal:	104,060	48.7%		
<i>Small Cities/Edge Cities</i>				
Twentysomethings	0	0.0%		
University / College Affiliates	1,915	0.9%	\$45,800	\$125,400
Subtotal:	1,915	0.9%		
<i>Agrarian/Rural</i>				
PC Pioneers	0	0.0%		
Subtotal:	0	0.0%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move Within The City Of Atlanta In 2003**

Household Classification By Market Groups
City of Atlanta, Fulton and DeKalb Counties, Georgia

<u>Household Type/ Geographic Designation</u>	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	24,610	2,110	19.9%
<i>Metropolitan Cities</i>	1,090	80	0.8%
<i>Metropolitan Suburbs</i>	22,130	1,890	17.8%
<i>Small Cities/Edge Cities</i>	1,390	140	1.3%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families	8,665	790	7.5%
<i>Metropolitan Cities</i>	8,665	790	7.5%
<i>Metropolitan Suburbs</i>	0	0	0.0%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
<i>Agrarian/Rural</i>	0	0	0.0%
Younger Singles & Couples	57,330	7,700	72.6%
<i>Metropolitan Cities</i>	23,655	2,900	27.4%
<i>Metropolitan Suburbs</i>	30,950	4,370	41.2%
<i>Small Cities/Edge Cities</i>	2,725	430	4.1%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	90,605	10,600	100.0%
Total City Households:	171,860		
Classified Households As A Share Of Total City Households:	52.7%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move Within The City Of Atlanta In 2003**

Household Classification By Market Groups
City of Atlanta, Fulton and DeKalb Counties, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	24,610	2,110	19.9%
<i>Metropolitan Cities</i>			
Urban Establishment	590	40	0.4%
Rowhouse Retirees	500	40	0.4%
<i>Subtotal:</i>	<u>1,090</u>	<u>80</u>	<u>0.8%</u>
<i>Metropolitan Suburbs</i>			
The Social Register	5,615	420	4.0%
Nouveau Money	3,140	270	2.5%
Post-War Suburban Pioneers	3,405	260	2.5%
Affluent Empty Nesters	270	20	0.2%
Blue-Collar Button-Downs	6,035	500	4.7%
Middle-American Retirees	3,665	420	4.0%
<i>Subtotal:</i>	<u>22,130</u>	<u>1,890</u>	<u>17.8%</u>
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	1,390	140	1.3%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	<u>1,390</u>	<u>140</u>	<u>1.3%</u>
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move Within The City Of Atlanta In 2003**

Household Classification By Market Groups
City of Atlanta, Fulton and DeKalb Counties, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	8,665	790	7.5%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	80	10	0.1%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	8,585	780	7.4%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>8,665</u>	<u>790</u>	<u>7.5%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	0	0	0.0%
Kids 'r' Us	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0.0%
Full-Nest Exurbanites	0	0	0.0%
New-Town Families	0	0	0.0%
Pillars of the Community	0	0	0.0%
Middle-American Families	0	0	0.0%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0.0%
Small-Town Families	0	0	0.0%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move Within The City Of Atlanta In 2003**

Household Classification By Market Groups
City of Atlanta, Fulton and DeKalb Counties, Georgia

	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Younger Singles & Couples	57,330	7,700	72.6%
<i>Metropolitan Cities</i>			
Urban Elite	1,040	110	1.0%
e-Types	7,745	890	8.4%
Urban Achievers	980	100	0.9%
New Bohemians	13,890	1,800	17.0%
<i>Subtotal:</i>	<u>23,655</u>	<u>2,900</u>	<u>27.4%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	11,380	1,520	14.3%
Fast-Track Professionals	11,220	1,550	14.6%
Suburban Achievers	510	60	0.6%
Generation X	7,840	1,240	11.7%
<i>Subtotal:</i>	<u>30,950</u>	<u>4,370</u>	<u>41.2%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University / College Affiliates	2,725	430	4.1%
<i>Subtotal:</i>	<u>2,725</u>	<u>430</u>	<u>4.1%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Balance of Fulton and De Kalb Counties, Georgia

Household Type/ Geographic Designation	<i>Estimated Number</i>	<i>Potential</i>	<i>Share of Potential</i>
Empty Nesters & Retirees			
	125,670	2,190	25.5%
<i>Metropolitan Cities</i>	535	10	0.1%
<i>Metropolitan Suburbs</i>	120,770	2,090	24.3%
<i>Small Cities/Edge Cities</i>	4,365	90	1.0%
<i>Town & Country/Exurbs</i>	0	0	0.0%
Traditional & Non-Traditional Families			
	71,065	1,530	17.8%
<i>Metropolitan Cities</i>	4,030	70	0.8%
<i>Metropolitan Suburbs</i>	39,165	880	10.2%
<i>Small Cities/Edge Cities</i>	0	0	0.0%
<i>Town & Country/Exurbs</i>	25,315	540	6.3%
<i>Agrarian/Rural</i>	2,555	40	0.5%
Younger Singles & Couples			
	170,945	4,880	56.7%
<i>Metropolitan Cities</i>	2,145	50	0.6%
<i>Metropolitan Suburbs</i>	166,815	4,770	55.5%
<i>Small Cities/Edge Cities</i>	1,985	60	0.7%
<i>Agrarian/Rural</i>	0	0	0.0%
Total:	367,680	8,600	100.0%
Total County Households:	430,145		
Classified Households As A Share Of Total County Households:	85.5%		

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Balance of Fulton and De Kalb Counties, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Empty Nesters & Retirees	125,670	2,190	25.5%
<i>Metropolitan Cities</i>			
Urban Establishment	535	10	0.1%
Rowhouse Retirees	0	0	0.0%
<i>Subtotal:</i>	535	10	0.1%
<i>Metropolitan Suburbs</i>			
The Social Register	29,020	440	5.1%
Nouveau Money	32,260	550	6.4%
Post-War Suburban Pioneers	17,210	270	3.1%
Affluent Empty Nesters	15,270	280	3.3%
Blue-Collar Button-Downs	11,460	190	2.2%
Middle-American Retirees	15,550	360	4.2%
<i>Subtotal:</i>	120,770	2,090	24.3%
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	0	0.0%
Active Retirees	4,365	90	1.0%
Blue-Collar Retirees	0	0	0.0%
<i>Subtotal:</i>	4,365	90	1.0%
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0.0%
<i>Subtotal:</i>	0	0	0.0%

**Households With The Potential
To Move To The City Of Atlanta In 2003**

Household Classification By Market Groups
Balance of Fulton and De Kalb Counties, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Traditional & Non-Traditional Families	71,065	1,530	17.8%
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0.0%
Multi-Cultural Families	0	0	0.0%
Black Urban Families	4,030	70	0.8%
Latino Urban Families	0	0	0.0%
<i>Subtotal:</i>	<u>4,030</u>	<u>70</u>	<u>0.8%</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	36,365	810	9.4%
Kids 'r' Us	2,800	70	0.8%
<i>Subtotal:</i>	<u>39,165</u>	<u>880</u>	<u>10.2%</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0.0%
Unibox Transferees	0	0	0.0%
Mainstream Families	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	7,250	150	1.7%
Full-Nest Exurbanites	11,500	250	2.9%
New-Town Families	1,840	40	0.5%
Pillars of the Community	0	0	0.0%
Middle-American Families	4,725	100	1.2%
Young Homesteaders	0	0	0.0%
<i>Subtotal:</i>	<u>25,315</u>	<u>540</u>	<u>6.3%</u>
<i>Agrarian/Rural</i>			
Heartland Families	1,750	30	0.3%
Small-Town Families	805	10	0.1%
Rustic Families	0	0	0.0%
<i>Subtotal:</i>	<u>2,555</u>	<u>40</u>	<u>0.5%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Households With The Potential
To Move To The City Of Atlanta In 2003**
Household Classification By Market Groups
Balance of Fulton and De Kalb Counties, Georgia

	<u>Estimated Number</u>	<u>Potential</u>	<u>Share of Potential</u>
Younger Singles & Couples	170,945	4,880	56.7%
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0.0%
e-Types	635	10	0.1%
Urban Achievers	255	10	0.1%
New Bohemians	1,255	30	0.3%
<i>Subtotal:</i>	<u>2,145</u>	<u>50</u>	<u>0.6%</u>
<i>Metropolitan Suburbs</i>			
The VIPs	19,470	530	6.2%
Fast-Track Professionals	61,835	1,740	20.2%
Suburban Achievers	39,835	1,020	11.9%
Generation X	45,675	1,480	17.2%
<i>Subtotal:</i>	<u>166,815</u>	<u>4,770</u>	<u>55.5%</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0.0%
University/College Affiliates	1,985	60	0.7%
<i>Subtotal:</i>	<u>1,985</u>	<u>60</u>	<u>0.7%</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0.0%
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0.0%</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Region/Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 5, 11 And 19

Atlanta Region and Other Georgia Counties

<u>Household Type/ Geographic Designation</u>	<u>Cobb, Gwinnett, Clayton, Forsyth</u>	<u>Cherokee, Fayette, Douglas, Coweta, Henry</u>	<u>Clarke, Muscogee, Chatham, Bibb, Hall, Rockdale</u>	<u>Total</u>
Empty Nesters & Retirees	720	10	80	810
<i>Metropolitan Cities</i>	0	0	0	0
<i>Metropolitan Suburbs</i>	550	10	10	570
<i>Small Cities/Edge Cities</i>	170	0	70	240
<i>Town & Country/Exurbs</i>	0	0	0	0
Traditional & Non-Traditional Families	2,320	510	180	3,010
<i>Metropolitan Cities</i>	0	0	0	0
<i>Metropolitan Suburbs</i>	780	100	0	880
<i>Small Cities/Edge Cities</i>	1,350	0	60	1,410
<i>Town & Country/Exurbs</i>	180	390	120	690
<i>Agrarian/Rural</i>	10	20	0	30
Younger Singles & Couples	1,340	70	40	1,450
<i>Metropolitan Cities</i>	0	0	0	0
<i>Metropolitan Suburbs</i>	1,020	70	20	1,110
<i>Small Cities/Edge Cities</i>	320	0	20	340
<i>Agrarian/Rural</i>	0	0	0	0
Total:	4,380	590	300	5,270
Percent:	83.1%	11.2%	5.7%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Region/Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 5, 11 And 19

Atlanta Region and Other Georgia Counties

	<i>Cobb, Gwinnett, Clayton, Forsyth</i>	<i>Cherokee, Fayette, Douglas, Coweta, Henry</i>	<i>Clarke, Muscogee, Chatham, Bibb, Hall, Rockdale</i>	<u>Total</u>
Empty Nesters & Retirees	720	10	80	810
<i>Metropolitan Cities</i>				
Urban Establishment	0	0	0	0
Rowhouse Retirees	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>				
The Social Register	60	0	0	60
Nouveau Money	280	0	0	280
Post-War Suburban Pioneers	80	0	0	80
Affluent Empty Nesters	60	0	10	70
Blue-Collar Button-Downs	60	10	0	70
Middle-American Retirees	10	0	0	10
<i>Subtotal:</i>	<u>550</u>	<u>10</u>	<u>10</u>	<u>570</u>
<i>Small Cities/Edge Cities</i>				
Middle-Class Move-Downs	100	0	30	130
Active Retirees	0	0	0	0
Blue-Collar Retirees	70	0	40	110
<i>Subtotal:</i>	<u>170</u>	<u>0</u>	<u>70</u>	<u>240</u>
<i>Town & Country/Exurbs</i>				
Mainstream Retirees	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Region/Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 5, 11 And 19

Atlanta Region and Other Georgia Counties

	<i>Cobb, Gwinnett, Clayton, Forsyth</i>	<i>Cherokee, Fayette, Douglas, Coweta, Henry</i>	<i>Clarke, Muscogee, Chatham, Bibb, Hall, Rockdale</i>	<u>Total</u>
Traditional & Non-Traditional Families	2,320	510	180	3,010
<i>Metropolitan Cities</i>				
Full-Nest Urbanites	0	0	0	0
Multi-Cultural Families	0	0	0	0
Black Urban Families	0	0	0	0
Latino Urban Families	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>				
Full-Nest Suburbanites	530	90	0	620
Kids 'r' Us	250	10	0	260
<i>Subtotal:</i>	<u>780</u>	<u>100</u>	<u>0</u>	<u>880</u>
<i>Small Cities/Edge Cities</i>				
Cosmopolitan Families	50	0	10	60
Unibox Transferees	710	0	10	720
Mainstream Families	590	0	40	630
<i>Subtotal:</i>	<u>1,350</u>	<u>0</u>	<u>60</u>	<u>1,410</u>
<i>Town & Country/Exurbs</i>				
Exurban Elite	10	0	0	10
Full-Nest Exurbanites	0	180	20	200
New-Town Families	0	30	10	40
Pillars of the Community	0	60	60	120
Middle-American Families	170	120	20	310
Young Homesteaders	0	0	10	10
<i>Subtotal:</i>	<u>180</u>	<u>390</u>	<u>120</u>	<u>690</u>
<i>Agrarian/Rural</i>				
Heartland Families	10	0	0	10
Small-Town Families	0	20	0	20
Rustic Families	0	0	0	0
<i>Subtotal:</i>	<u>10</u>	<u>20</u>	<u>0</u>	<u>30</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Atlanta Region/Other Georgia Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 5, 11 And 19

Atlanta Region and Other Georgia Counties

	<i>Cobb, Gwinnett, Clayton, Forsyth</i>	<i>Cherokee, Fayette, Douglas, Coweta, Henry</i>	<i>Clarke, Muscogee, Chatham, Bibb, Hall, Rockdale</i>	<u>Total</u>
Younger Singles & Couples	1,340	70	40	1,450
<i>Metropolitan Cities</i>				
Urban Elite	0	0	0	0
e-Types	0	0	0	0
Urban Achievers	0	0	0	0
New Bohemians	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>				
The VIPs	110	20	0	130
Fast-Track Professionals	240	10	0	250
Suburban Achievers	340	20	10	370
Generation X	330	20	10	360
<i>Subtotal:</i>	<u>1,020</u>	<u>70</u>	<u>20</u>	<u>1,110</u>
<i>Small Cities/Edge Cities</i>				
Twentysomethings	310	0	20	330
University/College Affiliates	10	0	0	10
<i>Subtotal:</i>	<u>320</u>	<u>0</u>	<u>20</u>	<u>340</u>
<i>Agrarian/Rural</i>				
PC Pioneers	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area/Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 22 And 26

Miami Area and Other Florida Counties

<u>Household Type/ Geographic Designation</u>	<i>Broward, Miami-Dade, Palm Beach</i>	<i>Duval, Hillsborough</i>	<u>Total</u>
Empty Nesters & Retirees	110	40	150
<i>Metropolitan Cities</i>	0	0	0
<i>Metropolitan Suburbs</i>	50	30	80
<i>Small Cities/Edge Cities</i>	60	10	70
<i>Town & Country/Exurbs</i>	0	0	0
Traditional & Non-Traditional Families	90	100	190
<i>Metropolitan Cities</i>	40	20	60
<i>Metropolitan Suburbs</i>	50	40	90
<i>Small Cities/Edge Cities</i>	0	10	10
<i>Town & Country/Exurbs</i>	0	30	30
<i>Agrarian/Rural</i>	0	0	0
Younger Singles & Couples	90	120	210
<i>Metropolitan Cities</i>	40	20	60
<i>Metropolitan Suburbs</i>	50	90	140
<i>Small Cities/Edge Cities</i>	0	10	10
<i>Agrarian/Rural</i>	0	0	0
Total:	290	260	550
Percent:	52.7%	47.3%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area/Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 22 And 26

Miami Area and Other Florida Counties

	<i>Broward, Miami-Dade, Palm Beach</i>	<i>Orange, Duval, Hillsborough</i>	<u>Total</u>
Empty Nesters & Retirees	110	40	150
<i>Metropolitan Cities</i>			
Urban Establishment	0	0	0
Rowhouse Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>
<i>Metropolitan Suburbs</i>			
The Social Register	0	0	0
Nouveau Money	10	0	10
Post-War Suburban Pioneers	0	0	0
Affluent Empty Nesters	20	0	20
Blue-Collar Button-Downs	0	10	10
Middle-American Retirees	20	20	40
<i>Subtotal:</i>	<u>50</u>	<u>30</u>	<u>80</u>
<i>Small Cities/Edge Cities</i>			
Middle-Class Move-Downs	0	10	10
Active Retirees	60	0	60
Blue-Collar Retirees	0	0	0
<i>Subtotal:</i>	<u>60</u>	<u>10</u>	<u>70</u>
<i>Town & Country/Exurbs</i>			
Mainstream Retirees	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Draw Area Households In The Miami Area/Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 22 And 26

Miami Area and Other Florida Counties

	<i>Broward, Miami-Dade, Palm Beach</i>	<i>Duval, Hillsborough</i>	<u>Total</u>
Traditional & Non-Traditional Families	90	100	190
<i>Metropolitan Cities</i>			
Full-Nest Urbanites	0	0	0
Multi-Cultural Families	10	0	10
Black Urban Families	10	0	10
Latino Urban Families	20	20	40
<i>Subtotal:</i>	<u>40</u>	<u>20</u>	<u>60</u>
<i>Metropolitan Suburbs</i>			
Full-Nest Suburbanites	30	20	50
Kids 'r' Us	20	20	40
<i>Subtotal:</i>	<u>50</u>	<u>40</u>	<u>90</u>
<i>Small Cities/Edge Cities</i>			
Cosmopolitan Families	0	0	0
Unibox Transferees	0	10	10
Mainstream Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Town & Country/Exurbs</i>			
Exurban Elite	0	0	0
Full-Nest Exurbanites	0	0	0
New-Town Families	0	0	0
Pillars of the Community	0	0	0
Middle-American Families	0	30	30
Young Homesteaders	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>30</u>	<u>30</u>
<i>Agrarian/Rural</i>			
Heartland Families	0	0	0
Small-Town Families	0	0	0
Rustic Families	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In The Miami Area/Other Florida Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 22 And 26

Miami Area and Other Florida Counties

	<i>Broward, Miami-Dade, Palm Beach</i>	<i>Duval, Hillsborough</i>	<u>Total</u>
Younger Singles & Couples	90	120	210
<i>Metropolitan Cities</i>			
Urban Elite	0	0	0
e-Types	0	0	0
Urban Achievers	20	10	30
New Bohemians	20	10	30
<i>Subtotal:</i>	<u>40</u>	<u>20</u>	<u>60</u>
<i>Metropolitan Suburbs</i>			
The VIPs	0	0	0
Fast-Track Professionals	30	10	40
Suburban Achievers	10	30	40
Generation X	10	50	60
<i>Subtotal:</i>	<u>50</u>	<u>90</u>	<u>140</u>
<i>Small Cities/Edge Cities</i>			
Twentysomethings	0	0	0
University/College Affiliates	0	10	10
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>
<i>Agrarian/Rural</i>			
PC Pioneers	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>

**Draw Area Households In All Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 29, 32, 35, 38 And 44

New York Area Counties; North Carolina Counties; Tennessee Counties; Texas Counties; All Other U.S. Counties

<u>Household Type/ Geographic Designation</u>	<u>New York, King</u>	<u>Mecklenburg, Wake</u>	<u>Shelby, Davidson</u>	<u>Dallas, Harris</u>	<u>App. Two Table 44</u>	<u>Total</u>
Empty Nesters & Retirees	30	10	10	30	580	660
<i>Metropolitan Cities</i>	30	0	0	0	70	100
<i>Metropolitan Suburbs</i>	0	0	0	30	340	370
<i>Small Cities/Edge Cities</i>	0	10	10	0	170	190
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	10	120	10	50	940	1,130
<i>Metropolitan Cities</i>	10	0	0	0	240	250
<i>Metropolitan Suburbs</i>	0	10	10	20	170	210
<i>Small Cities/Edge Cities</i>	0	40	0	30	160	230
<i>Town & Country/Exurbs</i>	0	70	0	0	370	440
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Younger Singles & Couples	100	90	110	80	680	1,060
<i>Metropolitan Cities</i>	100	0	0	40	250	390
<i>Metropolitan Suburbs</i>	0	60	100	40	290	490
<i>Small Cities/Edge Cities</i>	0	30	10	0	110	150
<i>Agrarian/Rural</i>	0	0	0	0	30	30
Total:	140	220	130	160	2,200	2,850
Percent:	4.9%	7.7%	4.6%	5.6%	77.2%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In All Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 29, 32, 35, 38 And 44

New York Area Counties; North Carolina Counties; Tennessee Counties; Texas Counties; All Other U.S. Counties

	<u>New York, King</u>	<u>Mecklenburg, Wake</u>	<u>Shelby, Davidson</u>	<u>Dallas, Harris</u>	<u>App. Two Table 44</u>	<u>Total</u>
Empty Nesters & Retirees	30	10	10	30	580	660
<i>Metropolitan Cities</i>						
Urban Establishment	0	0	0	0	40	40
Rowhouse Retirees	30	0	0	0	30	60
<i>Subtotal:</i>	<u>30</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>70</u>	<u>100</u>
<i>Metropolitan Suburbs</i>						
The Social Register	0	0	0	0	20	20
Nouveau Money	0	0	0	10	70	80
Post-War Suburban Pioneers	0	0	0	0	60	60
Affluent Empty Nesters	0	0	0	0	70	70
Blue-Collar Button-Downs	0	0	0	20	60	80
Middle-American Retirees	0	0	0	0	60	60
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>30</u>	<u>340</u>	<u>370</u>
<i>Small Cities/Edge Cities</i>						
Middle-Class Move-Downs	0	10	0	0	60	70
Active Retirees	0	0	0	0	60	60
Blue-Collar Retirees	0	0	10	0	50	60
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>	<u>0</u>	<u>170</u>	<u>190</u>
<i>Town & Country/Exurbs</i>						
Mainstream Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In All Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 29, 32, 35, 38 And 44

New York Area Counties; North Carolina Counties; Tennessee Counties; Texas Counties; All Other U.S. Counties

	<u>New York, King</u>	<u>Mecklenburg, Wake</u>	<u>Shelby, Davidson</u>	<u>Dallas, Harris</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Traditional & Non-Traditional Families	10	120	10	50	940	1,130
<i>Metropolitan Cities</i>						
Full-Nest Urbanites	0	0	0	0	50	50
Multi-Cultural Families	0	0	0	0	40	40
Black Urban Families	10	0	0	0	50	60
Latino Urban Families	0	0	0	0	100	100
<i>Subtotal:</i>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>240</u>	<u>250</u>
<i>Metropolitan Suburbs</i>						
Full-Nest Suburbanites	0	10	10	20	130	170
Kids 'r' Us	0	0	0	0	40	40
<i>Subtotal:</i>	<u>0</u>	<u>10</u>	<u>10</u>	<u>20</u>	<u>170</u>	<u>210</u>
<i>Small Cities/Edge Cities</i>						
Cosmopolitan Families	0	10	0	0	40	50
Unibox Transferees	0	20	0	30	70	120
Mainstream Families	0	10	0	0	50	60
<i>Subtotal:</i>	<u>0</u>	<u>40</u>	<u>0</u>	<u>30</u>	<u>160</u>	<u>230</u>
<i>Town & Country/Exurbs</i>						
Exurban Elite	0	10	0	0	50	60
Full-Nest Exurbanites	0	30	0	0	90	120
New-Town Families	0	10	0	0	60	70
Pillars of the Community	0	0	0	0	40	40
Middle-American Families	0	20	0	0	80	100
Young Homesteaders	0	0	0	0	50	50
<i>Subtotal:</i>	<u>0</u>	<u>70</u>	<u>0</u>	<u>0</u>	<u>370</u>	<u>440</u>
<i>Agrarian/Rural</i>						
Heartland Families	0	0	0	0	0	0
Small-Town Families	0	0	0	0	0	0
Rustic Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households In All Other US Counties
With The Potential To Move To The City of Atlanta In 2003**

Summary: Appendix Two, Tables 29, 32, 35, 38 And 44

New York Area Counties; North Carolina Counties; Tennessee Counties; Texas Counties; All Other U.S. Counties

	<u>New York, King</u>	<u>Mecklenburg, Wake</u>	<u>Shelby, Davidson</u>	<u>Dallas, Harris</u>	<u>App. Two Table 44</u>	<u>Total</u>
Younger Singles & Couples	100	90	110	80	680	1,060
<i>Metropolitan Cities</i>						
Urban Elite	50	0	0	0	20	70
e-Types	20	0	0	10	50	80
Urban Achievers	10	0	0	0	70	80
New Bohemians	20	0	0	30	110	160
<i>Subtotal:</i>	<u>100</u>	<u>0</u>	<u>0</u>	<u>40</u>	<u>250</u>	<u>390</u>
<i>Metropolitan Suburbs</i>						
The VIPs	0	20	20	0	70	110
Fast-Track Professionals	0	10	20	10	80	120
Suburban Achievers	0	10	30	10	70	120
Generation X	0	20	30	20	70	140
<i>Subtotal:</i>	<u>0</u>	<u>60</u>	<u>100</u>	<u>40</u>	<u>290</u>	<u>490</u>
<i>Small Cities/Edge Cities</i>						
Twentysomethings	0	30	10	0	50	90
University/College Affiliates	0	0	0	0	60	60
<i>Subtotal:</i>	<u>0</u>	<u>30</u>	<u>10</u>	<u>0</u>	<u>110</u>	<u>150</u>
<i>Agrarian/Rural</i>						
PC Pioneers	0	0	0	0	30	30
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>30</u>	<u>30</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households
With The Potential To Move Within/To The City of Atlanta In 2003**

Summary: Appendix One, Tables 5 Through 9

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

<u>Household Type/ Geographic Designation</u>	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Empty Nesters & Retirees	2,110	2,190	810	150	660	5,920
<i>Metropolitan Cities</i>	80	10	0	0	100	190
<i>Metropolitan Suburbs</i>	1,890	2,090	570	80	370	5,000
<i>Small Cities/Edge Cities</i>	140	90	240	70	190	730
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	790	1,530	3,010	190	1,130	6,650
<i>Metropolitan Cities</i>	790	70	0	60	250	1,170
<i>Metropolitan Suburbs</i>	0	880	880	90	210	2,060
<i>Small Cities/Edge Cities</i>	0	0	1,410	10	230	1,650
<i>Town & Country/Exurbs</i>	0	540	690	30	440	1,700
<i>Agrarian/Rural</i>	0	40	30	0	0	70
Younger Singles & Couples	7,700	4,880	1,450	210	1,060	15,300
<i>Metropolitan Cities</i>	2,900	50	0	60	390	3,400
<i>Metropolitan Suburbs</i>	4,370	4,770	1,110	140	490	10,880
<i>Small Cities/Edge Cities</i>	430	60	340	10	150	990
<i>Agrarian/Rural</i>	0	0	0	0	30	30
Total:	10,600	8,600	5,270	550	2,850	27,870
Percent:	38.0%	30.9%	18.9%	2.0%	10.2%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Draw Area Households
With The Potential To Move Within/To The City of Atlanta In 2003

Summary: Appendix One, Tables 5 Through 9

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Empty Nesters & Retirees	2,110	2,190	810	150	660	5,920
<i>Metropolitan Cities</i>						
Urban Establishment	40	10	0	0	40	90
Rowhouse Retirees	40	0	0	0	60	100
<i>Subtotal:</i>	80	10	0	0	100	190
<i>Metropolitan Suburbs</i>						
The Social Register	420	440	60	0	20	940
Nouveau Money	270	550	280	10	80	1,190
Post-War Suburban Pioneers	260	270	80	0	60	670
Affluent Empty Nesters	20	280	70	20	70	460
Blue-Collar Button-Downs	500	190	70	10	80	850
Middle-American Retirees	420	360	10	40	60	890
<i>Subtotal:</i>	1,890	2,090	570	80	370	5,000
<i>Small Cities/Edge Cities</i>						
Middle-Class Move-Downs	0	0	130	10	70	210
Active Retirees	140	90	0	60	60	350
Blue-Collar Retirees	0	0	110	0	60	170
<i>Subtotal:</i>	140	90	240	70	190	730
<i>Town & Country/Exurbs</i>						
Mainstream Retirees	0	0	0	0	0	0
<i>Subtotal:</i>	0	0	0	0	0	0

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Draw Area Households
With The Potential To Move Within/To The City of Atlanta In 2003

Summary: Appendix One, Tables 5 Through 9

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Traditional & Non-Traditional Families	790	1,530	3,010	190	1,130	6,650
<i>Metropolitan Cities</i>						
Full-Nest Urbanites	10	0	0	0	50	60
Multi-Cultural Families	0	0	0	10	40	50
Black Urban Families	780	70	0	10	60	920
Latino Urban Families	0	0	0	40	100	140
<i>Subtotal:</i>	<u>790</u>	<u>70</u>	<u>0</u>	<u>60</u>	<u>250</u>	<u>1,170</u>
<i>Metropolitan Suburbs</i>						
Full-Nest Suburbanites	0	810	620	50	170	1,650
Kids 'r' Us	0	70	260	40	40	410
<i>Subtotal:</i>	<u>0</u>	<u>880</u>	<u>880</u>	<u>90</u>	<u>210</u>	<u>2,060</u>
<i>Small Cities/Edge Cities</i>						
Cosmopolitan Families	0	0	60	0	50	110
Unibox Transferees	0	0	720	10	120	850
Mainstream Families	0	0	630	0	60	690
<i>Subtotal:</i>	<u>0</u>	<u>0</u>	<u>1,410</u>	<u>10</u>	<u>230</u>	<u>1,650</u>
<i>Town & Country/Exurbs</i>						
Exurban Elite	0	150	10	0	60	220
Full-Nest Exurbanites	0	250	200	0	120	570
New-Town Families	0	40	40	0	70	150
Pillars of the Community	0	0	120	0	40	160
Middle-American Families	0	100	310	30	100	540
Young Homesteaders	0	0	10	0	50	60
<i>Subtotal:</i>	<u>0</u>	<u>540</u>	<u>690</u>	<u>30</u>	<u>440</u>	<u>1,700</u>
<i>Agrarian/Rural</i>						
Heartland Families	0	30	10	0	0	40
Small-Town Families	0	10	20	0	0	30
Rustic Families	0	0	0	0	0	0
<i>Subtotal:</i>	<u>0</u>	<u>40</u>	<u>30</u>	<u>0</u>	<u>0</u>	<u>70</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Draw Area Households
With The Potential To Move Within/To The City of Atlanta In 2003

Summary: Appendix One, Tables 5 Through 9

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Younger Singles & Couples	7,700	4880	1,450	210	1,060	15,300
<i>Metropolitan Cities</i>						
Urban Elite	110	0	0	0	70	180
e-Types	890	10	0	0	80	980
Urban Achievers	100	10	0	30	80	220
New Bohemians	1,800	30	0	30	160	2,020
Subtotal:	<u>2,900</u>	<u>50</u>	<u>0</u>	<u>60</u>	<u>390</u>	<u>3,400</u>
<i>Metropolitan Suburbs</i>						
The VIPs	1,520	530	130	0	110	2,290
Fast-Track Professionals	1,550	1,740	250	40	120	3,700
Suburban Achievers	60	1,020	370	40	120	1,610
Generation X	1,240	1,480	360	60	140	3,280
Subtotal:	<u>4,370</u>	<u>4,770</u>	<u>1,110</u>	<u>140</u>	<u>490</u>	<u>10,880</u>
<i>Small Cities/Edge Cities</i>						
Twentysomethings	0	0	330	0	90	420
University/College Affiliates	430	60	10	10	60	570
Subtotal:	<u>430</u>	<u>60</u>	<u>340</u>	<u>10</u>	<u>150</u>	<u>990</u>
<i>Agrarian/Rural</i>						
PC Pioneers	0	0	0	0	30	30
Subtotal:	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>30</u>	<u>30</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households
With The Potential To Move To Downtown Atlanta In 2003**

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Household Type/ Geographic Designation	<i>City of Atlanta</i>	<i>Balance of Fulton/De Kalb</i>	<i>Other Georgia</i>	<i>Florida Counties</i>	<i>All Other U.S. Counties</i>	<u>Total</u>
Empty Nesters & Retirees	1,250	1,310	430	100	370	3,460
<i>Metropolitan Cities</i>	40	10	0	0	60	110
<i>Metropolitan Suburbs</i>	1,130	1,250	350	50	230	3,010
<i>Small Cities/Edge Cities</i>	80	50	80	50	80	340
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	600	50	0	50	200	900
<i>Metropolitan Cities</i>	600	50	0	50	200	900
<i>Metropolitan Suburbs</i>	0	0	0	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Younger Singles & Couples	2,690	1,710	520	60	360	5,340
<i>Metropolitan Cities</i>	1,020	10	0	20	140	1,190
<i>Metropolitan Suburbs</i>	1,520	1,680	400	40	170	3,810
<i>Small Cities/Edge Cities</i>	150	20	120	0	50	340
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Total:	4,540	3,070	950	210	930	9,700
Percent:	46.8%	31.6%	9.8%	2.2%	9.6%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

**Draw Area Households
With The Potential To Move To Downtown Atlanta In 2003**

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Empty Nesters & Retirees	1,250	1,310	430	100	370	3,460
<i>Metropolitan Cities</i>						
Urban Establishment	20	10	0	0	20	50
Rowhouse Retirees	20	0	0	0	40	60
<i>Subtotal:</i>	40	10	0	0	60	110
<i>Metropolitan Suburbs</i>						
The Social Register	250	260	40	0	10	560
Nouveau Money	160	330	170	10	50	720
Post-War Suburban Pioneers	160	160	50	0	40	410
Affluent Empty Nesters	10	170	40	10	40	270
Blue-Collar Button-Downs	300	110	40	10	50	510
Middle-American Retirees	250	220	10	20	40	540
<i>Subtotal:</i>	1,130	1,250	350	50	230	3,010
<i>Small Cities/Edge Cities</i>						
Middle-Class Move-Downs	0	0	80	10	40	130
Active Retirees	80	50	0	40	40	210
<i>Subtotal:</i>	80	50	80	50	80	340

**Draw Area Households
With The Potential To Move To Downtown Atlanta In 2003**

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Traditional & Non-Traditional Families	600	50	0	50	200	900
<i>Metropolitan Cities</i>						
Full-Nest Urbanites	10	0	0	0	40	50
Multi-Cultural Families	0	0	0	10	30	40
Black Urban Families	590	50	0	10	50	700
Latino Urban Families	0	0	0	30	80	110
<i>Subtotal:</i>	<u>600</u>	<u>50</u>	<u>0</u>	<u>50</u>	<u>200</u>	<u>900</u>

Draw Area Households
With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

	<u>City of Atlanta</u>	<u>Balance of Fulton/De Kalb</u>	<u>Other Georgia</u>	<u>Florida Counties</u>	<u>All Other U.S. Counties</u>	<u>Total</u>
Younger Singles & Couples	2,690	1710	520	60	360	5,340
<i>Metropolitan Cities</i>						
Urban Elite	40	0	0	0	20	60
e-Types	310	0	0	0	30	340
Urban Achievers	40	0	0	10	30	80
New Bohemians	630	10	0	10	60	710
<i>Subtotal:</i>	<u>1,020</u>	<u>10</u>	<u>0</u>	<u>20</u>	<u>140</u>	<u>1,190</u>
<i>Metropolitan Suburbs</i>						
The VIPs	530	190	50	0	40	810
Fast-Track Professionals	540	610	90	10	40	1,290
Suburban Achievers	20	360	130	10	40	560
Generation X	430	520	130	20	50	1,150
<i>Subtotal:</i>	<u>1,520</u>	<u>1,680</u>	<u>400</u>	<u>40</u>	<u>170</u>	<u>3,810</u>
<i>Small Cities/Edge Cities</i>						
Twentysomethings	0	0	120	0	30	150
University/College Affiliates	150	20	0	0	20	190
<i>Subtotal:</i>	<u>150</u>	<u>20</u>	<u>120</u>	<u>0</u>	<u>50</u>	<u>340</u>

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Tenure (Renter/Buyer) Profile

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Household Type/ Geographic Designation	..... Rental .....		..... Ownership				Total
	<i>Below Median</i>	<i>Above Median</i>	<i>Entry- Level</i>	<i>First-Time Move-Up</i>	<i>Move-Up/ Lateral</i>	<i>Move- Down</i>	
Empty Nesters & Retirees	200	530	0	220	1,400	1,110	3,460
<i>Metropolitan Cities</i>	10	30	0	10	30	30	110
<i>Metropolitan Suburbs</i>	160	430	0	160	1,300	960	3,010
<i>Small Cities/Edge Cities</i>	30	70	0	50	70	120	340
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0	0
Traditional & Non-Traditional Families	170	150	50	140	260	130	900
<i>Metropolitan Cities</i>	170	150	50	140	260	130	900
<i>Metropolitan Suburbs</i>	0	0	0	0	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0	0	0	0
Younger Singles & Couples	1,030	1,600	840	990	550	330	5,340
<i>Metropolitan Cities</i>	280	430	110	140	160	70	1,190
<i>Metropolitan Suburbs</i>	620	1,070	690	820	370	240	3,810
<i>Small Cities/Edge Cities</i>	130	100	40	30	20	20	340
<i>Agrarian/Rural</i>	0	0	0	0	0	0	0
Total:	1,400	2,280	890	1,350	2,210	1,570	9,700
Percent:	14.4%	23.5%	9.2%	13.9%	22.8%	16.2%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Tenure (Renter/Buyer) Profile

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Empty Nesters & Retirees	..... Rental .....		..... Ownership				Total
	<i>Below Median</i>	<i>Above Median</i>	<i>Entry- Level</i>	<i>First-Time Move-Up</i>	<i>Move-Up/ Lateral</i>	<i>Move- Down</i>	
Metropolitan Cities							
Urban Establishment	0	10	0	0	20	20	50
Rowhouse Retirees	10	20	0	10	10	10	60
<i>Subtotal:</i>	10	30	0	10	30	30	110
Metropolitan Suburbs							
The Social Register	0	40	0	0	310	210	560
Nouveau Money	0	50	0	0	370	300	720
Post-War Suburban Pioneers	0	70	0	0	230	110	410
Affluent Empty Nesters	20	50	0	50	70	80	270
Blue-Collar Button-Downs	40	80	0	110	140	140	510
Middle-American Retirees	100	140	0	0	180	120	540
<i>Subtotal:</i>	160	430	0	160	1,300	960	3,010
Small Cities/Edge Cities							
Middle-Class Move-Downs	10	30	0	30	30	30	130
Active Retirees	20	40	0	20	40	90	210
<i>Subtotal:</i>	30	70	0	50	70	120	340
Total:	200	530	0	220	1,400	1,110	3,460
Percent:	5.8%	15.3%	0.0%	6.4%	40.5%	32.1%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Tenure (Renter/Buyer) Profile

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Traditional & Non-Traditional Families	..... Rental .....		..... Ownership				Total
	<i>Below Median</i>	<i>Above Median</i>	<i>Entry- Level</i>	<i>First-Time Move-Up</i>	<i>Move-Up/ Lateral</i>	<i>Move- Down</i>	
Metropolitan Cities							
Full-Nest Urbanites	0	10	0	10	20	10	50
Multi-Cultural Families	0	10	0	10	10	10	40
Black Urban Families	140	90	40	110	220	100	700
Latino Urban Families	30	40	10	10	10	10	110
<i>Subtotal:</i>	170	150	50	140	260	130	900
Total:	170	150	50	140	260	130	900
Percent:	18.9%	16.7%	5.6%	15.6%	28.9%	14.4%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

Tenure (Renter/Buyer) Profile

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Younger Singles & Couples	..... Rental .....		..... Ownership				Total
	<i>Below Median</i>	<i>Above Median</i>	<i>Entry- Level</i>	<i>First-Time Move-Up</i>	<i>Move-Up/ Lateral</i>	<i>Move- Down</i>	
Metropolitan Cities							
Urban Elite	0	40	0	10	10	0	60
e-Types	40	60	40	60	110	30	340
Urban Achievers	20	20	10	10	10	10	80
New Bohemians	220	310	60	60	30	30	710
<i>Subtotal:</i>	280	430	110	140	160	70	1,190
Metropolitan Suburbs							
The VIPs	50	120	140	260	180	60	810
Fast-Track Professionals	170	280	300	330	110	100	1,290
Suburban Strivers	50	210	100	120	40	40	560
Generation X	350	460	150	110	40	40	1,150
<i>Subtotal:</i>	620	1,070	690	820	370	240	3,810
Small Cities/Edge Cities							
Twentysomethings	40	50	20	20	10	10	150
University/College Affiliates	90	50	20	10	10	10	190
<i>Subtotal:</i>	130	100	40	30	20	20	340
Total:	1,030	1,600	840	990	550	330	5,340
Percent:	19.3%	30.0%	15.7%	18.5%	10.3%	6.2%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

New Unit Purchase Propensity By Housing Type

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Household Type/ Geographic Designation	Multi- .. Family ..		Single- Family			Total
	<i>All Ranges</i>	<i>All Ranges</i>	<i>..... Detached</i>			
			<i>.. Attached ..</i>	<i>Low-Range</i>	<i>Mid-Range</i>	<i>High-Range</i>
Empty Nesters & Retirees	310	250	560	610	1,000	2,730
<i>Metropolitan Cities</i>	20	20	10	10	10	70
<i>Metropolitan Suburbs</i>	240	200	470	550	960	2,420
<i>Small Cities/Edge Cities</i>	50	30	80	50	30	240
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
Traditional & Non-Traditional Families	70	130	200	50	30	480
<i>Metropolitan Cities</i>	70	130	200	50	30	480
<i>Metropolitan Suburbs</i>	0	0	0	0	0	0
<i>Small Cities/Edge Cities</i>	0	0	0	0	0	0
<i>Town & Country/Exurbs</i>	0	0	0	0	0	0
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Younger Singles & Couples	790	540	370	370	270	2,340
<i>Metropolitan Cities</i>	200	110	20	30	50	410
<i>Metropolitan Suburbs</i>	550	390	330	330	220	1,820
<i>Small Cities/Edge Cities</i>	40	40	20	10	0	110
<i>Agrarian/Rural</i>	0	0	0	0	0	0
Total:	1,170	920	1,130	1,030	1,300	5,550
Percent:	21.1%	16.6%	20.4%	18.6%	23.4%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

New Unit Purchase Propensity By Housing Type

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Empty Nesters & Retirees	<i>Multi- .. Family ..</i>		<i>Single- Family</i>			Total
	<i>All Ranges</i>	<i>.. Attached ..</i>	<i>..... Detached</i>			
			<i>Low-Range</i>	<i>Mid-Range</i>	<i>High-Range</i>	
Metropolitan Cities						
Urban Establishment	10	10	0	10	10	40
Rowhouse Retirees	10	10	10	0	0	30
<i>Subtotal:</i>	<u>20</u>	<u>20</u>	<u>10</u>	<u>10</u>	<u>10</u>	<u>70</u>
Metropolitan Suburbs						
The Social Register	40	30	0	50	400	520
Nouveau Money	40	30	20	170	410	670
Post-War Suburban Pioneers	30	30	40	130	110	340
Affluent Empty Nesters	20	20	70	70	20	200
Blue-Collar Button-Downs	30	40	220	90	10	390
Middle-American Retirees	80	50	120	40	10	300
<i>Subtotal:</i>	<u>240</u>	<u>200</u>	<u>470</u>	<u>550</u>	<u>960</u>	<u>2,420</u>
Small Cities/Edge Cities						
Middle-Class Move-Downs	10	10	40	20	10	90
Active Retirees	40	20	40	30	20	150
<i>Subtotal:</i>	<u>50</u>	<u>30</u>	<u>80</u>	<u>50</u>	<u>30</u>	<u>240</u>
Total:	310	250	560	610	1,000	2,730
Percent:	11.4%	9.2%	20.5%	22.3%	36.6%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

New Unit Purchase Propensity By Housing Type

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Traditional & Non-Traditional Families	Multi- .. Family ..	Single- Family			Total	
	<i>All Ranges</i>	.. Attached .. <i>All Ranges</i>	..... Detached			
		<i>Low-Range</i>	<i>Mid-Range</i>	<i>High-Range</i>		
Metropolitan Cities						
Full-Nest Urbanites	0	10	10	10	10	40
Multi-Cultural Families	0	0	20	10	0	30
Black Urban Families	60	110	150	30	20	370
Latino Urban Families	10	10	20	0	0	40
<i>Subtotal:</i>	<u>70</u>	<u>130</u>	<u>200</u>	<u>50</u>	<u>30</u>	<u>480</u>
Total:	70	130	200	50	30	480
Percent:	14.6%	27.1%	41.7%	10.4%	6.3%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

New Unit Purchase Propensity By Housing Type

Draw Area Households

With The Potential To Move To Downtown Atlanta In 2003

City of Atlanta; Balance of Fulton and De Kalb Counties, Georgia; All Other U.S. Counties

Younger Singles & Couples	<i>Multi- .. Family ..</i>	<i>Single- Family</i>			<i>High-Range</i>	Total
	<i>All Ranges</i>	<i>.. Attached .. All Ranges</i>	<i>Low-Range</i>	<i>..... Detached</i>		
Metropolitan Cities						
Urban Elite	20	0	0	0	0	20
e-Types	70	50	10	10	30	170
Urban Achievers	10	10	0	10	10	40
New Bohemians	100	50	10	10	10	180
<i>Subtotal:</i>	<u>200</u>	<u>110</u>	<u>20</u>	<u>30</u>	<u>50</u>	<u>410</u>
Metropolitan Suburbs						
The VIPs	140	130	70	100	100	540
Fast-Track Professionals	200	120	100	130	90	640
Suburban Strivers	70	50	90	70	20	300
Generation X	140	90	70	30	10	340
<i>Subtotal:</i>	<u>550</u>	<u>390</u>	<u>330</u>	<u>330</u>	<u>220</u>	<u>1,820</u>
Small Cities/Edge Cities						
Twentysomethings	20	20	10	10	0	60
University / College Affiliates	20	20	10	0	0	50
<i>Subtotal:</i>	<u>40</u>	<u>40</u>	<u>20</u>	<u>10</u>	<u>0</u>	<u>110</u>
Total:	790	540	370	370	270	2,340
Percent:	33.8%	23.1%	15.8%	15.8%	11.5%	100.0%

SOURCE: Claritas, Inc.;
Zimmerman/Volk Associates, Inc.

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Research & Strategic Analysis

ASSUMPTIONS AND LIMITATIONS—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the methodology employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.



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Research & Strategic Analysis

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Appendix Three

TARGET MARKET DESCRIPTIONS

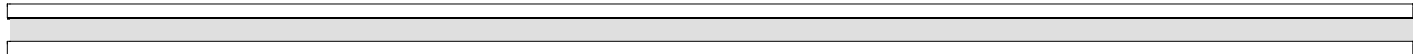
MARKET POSITION ANALYSIS

JSA-McGill LCI Study Area

Downtown Atlanta
City of Atlanta, Georgia

December 18, 2003

Conducted by
ZIMMERMAN / VOLK ASSOCIATES, INC.
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Research & Strategic Analysis

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YOUNGER SINGLES & COUPLES—*Agrarian/Rural*

PC Pioneers

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TARGET MARKET DESCRIPTIONS _____

The following target market lifestyle and values profiles have been developed by Zimmerman/Volk Associates, Inc. based on United States Bureau of Census data, Claritas' geo-demographic segmentation, and Zimmerman/Volk Associates' lifestyle and housing correlation methodology. The target market lifestyle and values profiles have been devised for use by design, marketing, and merchandising professionals in perfecting the position of new housing within the marketplace.





EMPTY NESTERS & RETIREES

– Metropolitan Cities –



THE URBAN ESTABLISHMENT

Configuration: Empty-nest couples; older singles (divorced and widowed).
Average household size—2 persons.
Predominant age range of adults—45 to 64.

Characteristics: Affluent older couples, secure in their power and position.
Success achieved through intelligence, connections and contacts.
Two-thirds attended or graduated from college, remarkable for their older age cohort.
High-ranking professionals in business and finance; arts and entertainment.

Housing preferences: Exclusive urban neighborhoods.
Elegant townhouses (the city version) and condominiums (the high-rise version).
Nearly one-quarter lease large, luxurious apartments.

Consumption patterns: Chauffeured car.
Investment property.
Espresso maker.
World travel.
Watch *Washington Week In Review*.
Read *The Wall Street Journal*.

Icons: Mark Cross appointment book; the blue Tiffany box and the red Cartier box.



“Wealth is the parent of luxury and indolence.”

– Plato



ROWHOUSE RETIREES

Configuration: Empty-nest couples; widows and widowers; children live at home until they get married.

Average household size—2 to 3 persons.

Predominant age range of adults—65 and older.

Characteristics: Middle-income households, often immigrant, Latino or Asian.

First-generation Americans.

High-school educated.

A mix of blue- and white-collar workers.

Housing preferences: Dense, urban neighborhoods built before World War II.

Rowhouses; duplexes; three-story apartment buildings.

Homes are frequently sold or leased to family members. Low property values.

Consumption patterns: Rarely own cars; older Jeep Grand Wagoneer, Buick Century.

Membership in religious organizations; Christmas clubs; unions.

Fans of boxing and bowling.

Caribbean cruises.

Watch *Court TV*.

Read *Entertainment Weekly*.

Icons: Lace curtains; lottery tickets.



“Join the United States and join the family—
But not much in between unless a college.”

– Robert Frost





EMPTY NESTERS & RETIREES

– Metropolitan Suburbs –



THE SOCIAL REGISTER

Configuration: Empty-nest couples; families with high school- and college-aged children.
Average household size—2 to 3 persons.
Predominant age range of adults—45 to 64.

Characteristics: Upper crust, wealthy American families—one in 10 is a multi-millionaire.
Heirs to “old money;” accustomed to privilege and luxury.
Highly educated, with college and graduate degrees.
Judges; medical specialists; chief executive officers.

Housing preferences: Older metropolitan suburban fringe areas.
Estate homes in high-prestige neighborhoods; secluded older estates.
Attached units for resort homes or urban *pieds-à-terre*.

Consumption patterns: A collection of thoroughbred automobiles.
Theater; classical music.
Tennis; golf.
Extended visits to Europe.
Watch *Wall Street Week*.
Read *Architectural Digest*.

Icons: Threadbare Oriental carpets; chipped heirloom Waterford crystal.



“They [the very rich] are different from you and me.”

– F. Scott Fitzgerald



NOUVEAU MONEY

Configuration: Empty-nest couples; families with teen-aged children.
Average household size—2 to 3 persons.
Predominant age range of adults— 45 to 64.

Characteristics: Affluent, family-oriented households.
Conspicuous displays of wealth.
Highly educated, with college and graduate degrees.
Executives, entrepreneurs in technology, consumer services, and
pharmaceuticals; doctors; lawyers, stockbrokers.

Housing preferences: Newer metropolitan suburban fringe areas.
Expensive new mansions with “power façades” and very high property values.
Attached units for second homes.

Consumption patterns: Expensive automobiles—Mercedes-Benzes and Porsches—and SUVs—Land
Rovers or Lincoln Navigators.
Prolific spenders and global travelers.
Country club membership: golf; tennis.
Skiing in Aspen.
Watch *NYPD Blue*.
Read *Kiplinger’s Personal Finance*.

Icons: Housekeeper; Titanium Visa Card.



“That’s it, baby, if you’ve got it, flaunt it.”

– Mel Brooks



POST-WAR SUBURBAN PIONEERS

Configuration: Empty-nest couples; some singles—widows/widowers, divorcés/divorcées.
Average household size—2 persons.
Predominant age range of adults—55 to 64; 65 and older.

Characteristics: Upper-middle-income couples whose last children have just left home.
Parents of the Baby Boom Generation.
Some college education; high-school graduates.
Mostly white-collar workers, with jobs they've held for years.

Housing preferences: Post World-War II suburban subdivisions.
Originally, relatively modest detached houses; however, most have been fitted with various additions and improvements.
Many still live in the houses they bought new, 30 or 40 years ago; when they move, they downsize to an apartment downtown and a resort condominium.

Consumption patterns: Foreign cars, *e.g.*—Saabs, Volvos.
Trips to gambling resorts.
Low-fat food and diet drinks.
Theater and museum attendees.
Watch *Ebert & Roeper and the Movies*.
Read *Money*.

Icons: Suits at work, sweats at home; pasta machines.



“If youth but knew; if old age but could.”

– Henri Estienne



AFFLUENT EMPTY NESTERS

Configuration: Married empty-nest couples.
 Average household size—2 persons.
 Predominant age range of adults—55 to 64; 65 and older.

Characteristics: Older established couples with two incomes.
 Significant financial resources—untapped equity in their homes.
 Two-thirds are college educated.
 Small-business owners; corporate officers; sales directors.

Housing preferences: Older suburban neighborhoods.
 Detached houses with high property values.
 Likely to move to rentals, townhouses, or small-lot singles when last child has left home.

Consumption patterns: Saturns and Suburus.
 An active life of travel, leisure, and entertainment.
 Adult education courses.
 Cruises; travel abroad.
 Watch *Charlie Rose*.
 Read *Golf Digest*.

Icons: Callaway golf clubs; AAA membership card.



“We made our money the old-fashioned way; we earned it.”

– Variation on Advertisement



BLUE-COLLAR BUTTON-DOWNS

Configuration: Married couples with older children, many of whom have left the nest.
Average household size—2 to 3 persons.
Predominant age range of adults—45 to 54; 55 to 64.

Characteristics: Middle-class households with working-class values.
The “white flight” of the post-war years.
Most are high-school grads; many also attended two-year colleges or technical schools.
Small contractors, small business owners, technical or sales workers.

Housing preferences: Post-war subdivisions of “carpenter capes” and ranches.
Most live in older single-family detached houses, although some empty-nest couples have “moved down” to new townhouses or condominiums.
Over 75 percent own their homes.

Consumption patterns: American cars, *e.g.*—Ford Tempos, Buick Skylarks.
Community-oriented activities.
Do-it-yourself home and auto maintenance.
Sports fanatics.
Watch *Providence*.
Read *Reader’s Digest*.

Icons: Above-ground swimming pool; backyard gas grill.



“Nice work if you can get it,
And you can get it if you try.”

– Ira Gershwin



MIDDLE-AMERICAN RETIREES

Configuration: Retired couples and singles.
Average household size—1 to 2 persons.
Predominant age range of adults—55 and older.

Characteristics: Middle-income households with middle-class sensibilities.
Family-, not community-oriented.
Educated at public universities.
Former teachers; social workers; small business owners.

Housing preferences: Older inner-ring suburbs.
Well-kept garden apartments, rowhouses, bungalows.
More than half own their residence and the mortgage is paid off.

Consumption patterns: Suzukis and Nissans.
Clothing from local stores.
Frequent fast-food restaurants, dollar stores.
Gossip with friends.
Watch *NBC Nightly News*.
Read *Ladies Home Journal*.

Icons: Ten-year-old toaster oven; family dinners.



“If I’d known I was going to live this long,
I’d have taken better care of myself.”

– Eubie Blake





EMPTY NESTERS & RETIREES

– *Small Cities/Edge Cities* –



MIDDLE-CLASS MOVE-DOWNS

Configuration: Older married couples, widows/widowers, divorcés/divorcées.
Average household size—2 persons.
Predominant age range of adults—65 and older; 55 to 64.

Characteristics: Older couples in the middle of the socio-economic scale.
Some members of this group have already retired.
Most are high school graduates; some attended college.
Middle managers; professionals; retired military officers.

Housing preferences: Mid-scale satellite cities.
Moderate-value ramblers and ranches; new townhouses as move-down alternatives.
Two-thirds of these households own their homes.

Consumption patterns: Buick Park Avenues, Cadillac DeVilles, Buick LeSabres.
Resort time-shares.
College sports fanatics.
Adult education courses.
Watch *The Today Show*.
Read *Newsweek*.

Icons: Bloody Marys; local university booster apparel.



“So always look for the silver lining
And try to find the sunny side of life.”

– P.G. Wodehouse



ACTIVE RETIREES

Configuration: Empty-nest couples; most are retired.
Average household size—2 persons.
Predominant age range of adults—55 and older.

Characteristics: Well-to-do couples with pensions and portfolios.
Lead a busy, leisure-filled retirement.
Some college educations.
Before retirement, held white-collar jobs.

Housing preferences: Retirement communities, preferably in resort locations.
Attached or small-lot detached houses.
Many live in lifestyle-oriented, age-restricted communities.

Consumption patterns: Long-lasting, luxury sedans, such as Lincolns, Cadillacs or Mercedes-Benz, which they bought with cash.
Convenience foods; items for easy entertaining: cocktail snacks and frozen desserts.
Golf or tennis fanatics.
Overseas tour packages.
Watch *60 Minutes*.
Read *House Beautiful*.

Icons: Passports; matching golf outfits.



“Just enjoy your ice cream while it’s on your plate.”

– Thornton Wilder



BLUE-COLLAR RETIREES

Configuration: Older singles and couples.
Average household size—2 persons.
Predominant age range of adults—65 and older.

Characteristics: Empty-nest, lower-middle-income households.
Former policemen, firemen, repairmen, technicians.
High-school grads.
Most are retired or nearing retirement.

Housing preferences: Bedroom suburbs of industrial cities.
Most stay in their homes, but a few choose to retire in resort locations.
More than a quarter are still living in the same house they bought when they got married.

Consumption patterns: Buick Century.
Easy-listening tapes.
Recreational vehicles; camping equipment.
Library card.
Watch *Tonight Show With Jay Leno*.
Read *Family Handyman*.

Icons: Large-screen TV; “collectible” dolls and plates.



“We’re tenting tonight on the old campground,
Give us a song to cheer
Our weary hearts, a song of home
And friends we love so dear.”

– Walter Kittredge





EMPTY NESTERS & RETIREES

– Town & Country/Exurbs –



MAINSTREAM RETIREES

Configuration: Retired couples.
Average household size—2 persons.
Predominant age range of adults—65 and older.

Characteristics: Lower-middle-income households.
Prefer to spend their “golden years” around people of all ages.
High-school educated.
Earned their living in blue- and white-collar employment.

Housing preferences: Rustic towns and villages.
Small detached houses and cottages; mobile homes.
Near water, mountain, desert or other vacation regions.

Consumption patterns: Older American-made sedans, *e.g.*—Chrysler New Yorkers, Dodge Diplomats.
Knitting; sewing; gardening; bingo; cable TV; reading.
Senior citizen volunteer programs.
Bowling; golf.
Watch *Price is Right*.
Read *Family Circle*.

Icons: Cable TV guide; aluminum folding chair.



“And love can come to everyone,
The best things in life are free.”

– Buddy De Sylva





TRADITIONAL & NON-TRADITIONAL FAMILIES

– Metropolitan Cities –



FULL-NEST URBANITES

Configuration: Multi-generational households—the “extended family.”
Average household size—4-plus persons.
Predominant age range of adults—35 to 54.

Characteristics: Ethnically diverse. Upper-middle-class immigrants.
Well-educated; many pursue adult education.
Multi-racial, multi-lingual.
White-collar professionals; government and health workers.

Housing preferences: Urban neighborhoods.
Relatively settled—more than half have lived in the same house for more than six years.
Nearly three-quarters own their houses.

Consumption patterns: Toyotas, Mazdas, Hondas, Nissans.
Belong to local ethnic organizations.
Foreign movies.
Boats and RVs.
Watch *Showtime*.
Read *People*.

Icons: Neighborhood watch programs; beepers.



“America, the land of unlimited possibilities.”

– Ludwig Max Goldberger



MULTI-CULTURAL FAMILIES

Configuration: Families with lots of children; single-parent families.

Average household size—4-plus persons.

Predominant age range of adults—25 to 54.

Characteristics: Middle-income immigrant families.

High-school graduates.

Lower-level white-collar and upper-level blue-collar workers.

Jobs range from day laborers to management professionals.

Housing preferences: Older urban rowhouse and bungalow neighborhoods.

Two-thirds own their houses.

Dream of moving to larger houses in more affluent neighborhoods.

Consumption patterns: Public transportation.

Bodegas; Czech bakeries; Mexican restaurants; German breweries; Pizzerias.

Home maintenance.

Foreign-language newspapers.

Watch *Cops*.

Read *Us*.

Icons: Gitano jeans; U.S. Savings Bonds.



“America is God’s crucible, the great melting pot where all
the races are melting and reforming.”

– Israel Zangwill



BLACK URBAN FAMILIES

Configuration: Working couples with children; single-parent families.

Average household size—4 persons.

Predominant age range of adults—25 to 44.

Characteristics: Middle-class African-American households.

40 percent are college-educated.

White-collar, blue-collar, and service employment.

Teachers; craftspeople; health care employees; service workers.

Housing preferences: Rowhouses; low-rise apartments in transitional urban neighborhoods.

Mix of long-time residents and newcomers.

More than half own their houses, which they have owned for several years.

Consumption patterns: Pontiac LeMans, Plymouth Acclaim, Chevrolet Corsica, Toyota Corolla.

Saving to give their kids a better chance.

Singing in the church choir.

Volunteer and community involvement.

Watch *The Montel Williams Show*.

Read *Essence*.

Icons: Photograph of Martin Luther King; Mighty Clouds of Joy gospel tapes.



“Before a group can enter the open society,
it must first close ranks.”

– Stokely Carmichael and
Charles Vernon Hamilton



LATINO URBAN FAMILIES

Configuration: Families with children; single-parent families; extended families.

Average household size—4-plus persons.

Predominant age range of adults—25 to 34.

Characteristics: Primarily Spanish-speaking households; many recent immigrants from Latin America and South America.

More than 43 percent did not finish high school.

Blue-collar and service employment.

Manual laborers; maintenance workers; government clerks.

Housing preferences: High-rise and low-rise apartments in older neighborhoods; rowhouses.

Nearly two-thirds are renters.

Highly mobile: more than half have moved within the last six years.

Consumption patterns: Ten-year-old Toyota Tercels, Honda Civics, Nissan Sentras.

Vibrant street life; sitting on the stoop chatting with the neighbors.

Church activities.

Social clubs.

Watch *All My Children*.

Read *Soap Opera Weekly*.

Icons: Our Lady of Guadalupe; Salsa.



“Con pan y vino se anda el camino.
[With bread and wine you can walk your road.]”

– Proverb





TRADITIONAL & NON-TRADITIONAL FAMILIES

– Metropolitan Suburbs –



FULL-NEST SUBURBANITES

Configuration: Families with two or more children.
Average household size—4-plus persons.
Predominant age range of adults—35 to 44; 45 to 54.

Characteristics: Upper-middle-income suburban families.
Significant numbers of stay-at-home Moms.
Well educated—more than two-thirds went to college.
Officers of small corporations; sales managers; communications.

Housing preferences: Upscale suburban subdivisions.
More than half have moved within the past six years.
Relatively high property values.

Consumption patterns: Practical family automobiles—mini-vans for carpooling (*e.g.*—Toyota Sienna) and SUVs for show (*e.g.*—Dodge Grand Caravan).
Family-oriented activities.
Spectator and Little League sports.
Frequent visits to Disney World.
Watch *The Disney Channel*.
Read *USA Today*.

Icons: Weber barbecue grill; “My child is an honor student at ...” bumper stickers.



“Hail wedded love, mysterious law, true source of human offspring.”

– John Milton



KIDS 'R' US

Configuration: Large families with children of all ages.
Average household size—4-plus persons.
Predominant age range of adults—25 to 34; 35 to 44.

Characteristics: Early child-rearing families concerned with cost and convenience.
Nearly all have high-school diplomas; significant number of college degrees.
White-collar employment.
Technicians, executive trainees, public service employees; accountants.

Housing preferences: New subdivisions outside fast-growing metro areas.
Detached houses—two-stories and split-levels.
More than 75 percent own their homes, and have just started payments on a mortgage.

Consumption patterns: Station wagons, minivans, and pick-up trucks.
Maternity clothes.
Kids' toys.
Bargain shopping at Kmart, Sears and JC Penney.
Watch *Mad About You* reruns.
Read *Popular Science*.

Icons: Disposable diapers; garage sales.



“There’s always room for one more.”

– Saying





TRADITIONAL & NON-TRADITIONAL FAMILIES

– Small Cities/Edge Cities –



COSMOPOLITAN FAMILIES

Configuration: Older families with teen-aged children.
Average household size—3-to 4 persons.
Predominant age range of adults—35 to 54.

Characteristics: Upper-middle- to high-income families—oldest of the Baby Boomers.
Pre-empty nesters; professional parents who had their children in their 30s.
Well educated—more than two-thirds attended college.
Prominent professionals and executives in local business, finance, law, and communications industries.

Housing preferences: Single-family neighborhoods within smaller cities.
Detached houses in wealthy enclaves, often near the country club.
More than 40 percent have moved within the past six years.

Consumption patterns: Several automobiles—one for Mom (Chevrolet Suburban), Dad (Mercedes-Benz), and the two teenagers (Volkswagon Jetta and Jeep).
Family membership at the country club.
Involvement in civic activities—historic preservation, beautification programs.
Frequent visits to Europe.
Watch *Frasier*.
Read *Bon Appetit*.

Icons: Full-screen TV in the multi-media room; family membership in English Heritage.



“Wealth is not without its advantages.”

– John Kenneth Galbraith



UNIBOX TRANSFEREES

Configuration: Families with pre-school and school-aged children.
Average household size—4 persons.
Predominant age range of adults—25 to 34; 35 to 44.

Characteristics: Upper-middle-income younger families; both spouses work.
One-third graduated from college.
On the move; frequent transfers for better jobs, better pay.
Career-oriented middle managers; many are computer literate with home offices.

Housing preferences: Single-family detached houses in brand-new subdivisions just outside suburban satellite cities.
Two-story uniboxes, easy to resell when the next transfer comes.
More than 25 percent move every year.

Consumption patterns: New Isuzu Trooper, Mercury Villager.
Heavy business travel, both spouses.
Cleaning service; laundry service; 18-hour babysitters.
Soccer Moms and Dads.
Watch *Frontline*.
Read *Fortune*.

Icons: Car phones; platinum frequent flyer cards.



“They change their clime, not their disposition.”

– Horace



MAINSTREAM FAMILIES

Configuration: Young families with several young children.

Average household size—4-plus persons.

Predominant age range of adults—25 to 34.

Characteristics: Middle-income households; early marriage and parenthood.

High-school educated.

Stable, traditional-style families; mothers rarely work.

Skilled craftsmen and union laborers.

Housing preferences: Outskirts of smaller cities.

Starter-home neighborhoods of ramblers and ranches.

Nearly 60 percent own their homes.

Consumption patterns: Mitsubishi Mirages, Geo Storms.

Pop Tarts, Kool-Aid, and other kid foods, bought in bulk; fast food restaurants.

Clothing from Kmart or Wal-Mart.

Resort campgrounds.

Watch *The Cartoon Network*.

Read *Bride's Magazine*.

Icons: Pop-up camper; Beanie Babies.



“It [tradition] cannot be inherited, and if you want it you must obtain it by great labor.”

– T.S. Eliot





TRADITIONAL & NON-TRADITIONAL FAMILIES

– Town & Country/Exurbs –



EXURBAN ELITE

Configuration: Married couples with children.
Average household size—3 to 4 persons.
Predominant age range of adults—35 to 54.

Characteristics: Wealthy families living in private luxury.
Highly-educated; three-quarters have college degrees.
Former residents of cities or metropolitan suburbs who have “escaped” urban stress.
Executives; professionals; entrepreneurs; freelance consulting businesses.

Housing preferences: “Retreat” locations—the Maine coast; horse farms in Virginia; Taos, New Mexico.
“Estate” homes—custom if new; restored if old.
Among the highest home values in the nation.

Consumption patterns: Saabs, Audis, Volvos.
Extensive travel—England in spring, Nantucket in summer, Paris in fall, the Caribbean in winter.
The children attend boarding school.
Club sports.
Watch *The Late Show With David Letterman*.
Read *Martha Stewart Living*.

Icons: Home offices; private stables.



“Far from the madding crowd’s ignoble strife,
Their sober wishes never learn’d to stray;
Along the cool sequester’d vale of life
They kept the noiseless tenor of their way.”

– Thomas Gray



FULL-NEST EXURBANITES

Configuration: Families with children.

Average household size—3 to 4 persons.

Predominant age range of adults—35 to 44; 45 to 54.

Characteristics: Upper-middle-income families who relocate frequently.

Family- and outdoor-oriented.

Well educated, with college degrees.

Professional and managerial workers, following high-tech companies.

Housing preferences: Rural, upscale boomtowns.

Detached houses in new subdivisions, often on recently-developed farmland.

Close to corporations located along major highway corridors.

Consumption patterns: Minivans (*e.g.*—Plymouth Grand Voyager) and SUVs (*e.g.*—GMC Safari.)

Camping in state forests; hiking; backpacking; canoeing.

Gardens and golf.

Video cameras, VCRs and stereo equipment.

Watch *Home Improvement* reruns.

Read *Golf Magazine*.

Icons: Garden tiller; Newcomers Club membership.



“A piece of land not so very large, which would contain a garden,
and near the house a spring of ever-flowing water,
and beyond these a bit of wood.”

– Horace



NEW-TOWN FAMILIES

Configuration: Families with children of all ages.
Average household size—4 persons.
Predominant age range of adults—25 to 44.

Characteristics: Young, upper-middle-class town families.
High-school graduates, two-thirds have gone to local universities.
Cost-conscious early adopters.
Local white- and blue-collar occupations.

Housing preferences: Upper-middle-class neighborhoods of satellite cities or the metropolitan fringes.
Detached houses, with multi-family in some areas.
Nearly 80 percent own their homes, which are mortgaged to the hilt.

Consumption patterns: Ford Windstar.
Fitness freaks.
Volunteers at schools and sporting clubs.
Little League baseball; children's soccer and football leagues.
Watch *Good Morning America*.
Read *PC Magazine*.

Icons: Home treadmill; maxed-out credit cards.



“The root of the state is in the family.”

– Mencius



PILLARS OF THE COMMUNITY

Configuration: Families with school-age children and teenagers.

Average household size—3 to 4 persons.

Predominant age range of adults—35 to 54.

Characteristics: Well-to-do families with “standing” in the community.

High-school graduates, with some college.

Conservative businesspeople.

Presidents of local banks, mortuaries, department stores; small-business owners;
local doctors and lawyers.

Housing preferences: Semi-rural small towns fast becoming middle-class suburbs.

The nicest house on the nicest street in town.

New subdivisions on the edge of town.

Consumption patterns: Buy “American”—cars, clothes, cameras.

Belong to the country club.

High volunteerism—garden club, hospital, church activities.

The sons play football; the daughters are cheerleaders.

Watch *The Today Show*.

Read *Country Living*.

Icons: Bass-fishing boat; Caribbean cruises.



“Always give your best, never get discouraged, never be petty.”

– Richard M. Nixon



MIDDLE-AMERICAN FAMILIES

Configuration: Families with many children.
Average household size—4-plus persons.
Predominant age range of adults—25 to 44.

Characteristics: Middle-class, middle-American families living in middle-sized towns.
Nearly all are high school graduates; a few went to college.
Worry about maintaining their living standards.
Small shopkeepers; retail workers; salespersons; nurses.

Housing preferences: Mid-sized towns.
Stable neighborhoods.
Mostly three-bedroom ramblers, although mobile homes are an affordable alternative for the younger families.

Consumption patterns: Ford pick-ups and Pontiac Grand Prix.
Lots of pets, including dogs, cats, rabbits, parakeets, gerbils.
Fast food and family barbecues.
Little League baseball and bowling leagues.
Watch *America's Most Wanted*.
Read *Parenting*.

Icons: Hummel figurines on the mantel; bowling league trophies in the den.



“You will be safest in the middle.”

– Ovid



YOUNG HOMESTEADERS

Configuration: Families with children.
Average household size—3 to 4 persons.
Predominant age range of adults—35 to 44.

Characteristics: Middle-class families priced out of suburbia.
Some college educations.
Paramount concern is a safe place for children.
Decent jobs in retail, health and the communications industries.

Housing preferences: In or near rapidly-growing exurban areas.
Bungalows, ranches and Cape Cods.
About 70 percent own their homes.

Consumption patterns: Jeep Grand Wagoneers and GMC Sierras.
Wilderness camping; backpacking.
Halloween.
At-home Saturday nights.
Watch *CBS Evening News*.
Read *National Geographic*.

Icons: Campers; every kind of pet.



“Ah, wilderness were Paradise enow!”

– Omar Khayyám





TRADITIONAL & NON-TRADITIONAL FAMILIES

– Agrarian/Rural –



HEARTLAND FAMILIES

Configuration: Married couples, most with kids.
Average household size—3 to 5 persons.
Predominant age range of adults—35 to 54.

Characteristics: Rural, family-oriented households.
More than half were born and raised in the same place, the rest just arrived from the city.
High-school graduates.
Well-paid skilled craftsmen; machinists; builders; farmers.

Housing preferences: Quiet towns in scenic settings.
New ranch-house developments surrounding old town centers.
Most own their own detached homes, be it two-story, bilevel, ranch, or mobile home.

Consumption patterns: Chevrolet Astros and Plymouth Grand Voyagers.
Hunting; fishing; boating; other outdoor activities.
Needlepoint and photography.
Vegetable gardens.
Watch *Full House* reruns.
Read *Outdoor Life*.

Icons: “His,” “hers,” and “theirs” backpacks and sleeping bags; fly fishing reel.



“His first, best country ever is, at home.”

– Oliver Goldsmith



SMALL-TOWN FAMILIES

Configuration: Married couples, most with children.
Average household size—4 persons.
Predominant age range of adults—35 to 44; 45 to 54.

Characteristics: Solid middle-class citizens.
High-school graduates.
Raising kids in an old-fashioned way of life.
Blue-collar and farming jobs.

Housing preferences: Rural middle-class towns.
Farmhouses, of the front-porch variety; ranches, ramblers, and mobile homes.
Predominantly homeowners.

Consumption patterns: Dodge, Ford and Chevy pick-up trucks; Chevy Lumina.
Friday night football at the local high school.
Boats and campers for fishing and hunting.
Church suppers.
Watch *Family Channel*.
Read *Family Circle*.

Icons: American flag; bib overalls.



“No Farmers, No Food.”

– Bumper Sticker



RUSTIC FAMILIES

Configuration: Married couples with school-age children.

Average household size—4 persons.

Predominant age range of adults—35 to 54.

Characteristics: Lower-middle-income households.

High-school educated.

Respectful children, well-tended gardens, a few cattle for extra money.

Farmers; blue-collar workers, many in the lumber industry; military recruits.

Housing preferences: Rural crossroads villages.

Modest detached houses or mobile homes; ranch houses on small lots.

Over 80 percent own their homes.

Consumption patterns: Chevrolet, Dodge and Ford 4x4 pickup trucks with CD players and gun racks.

Guns; woodworking; auto repair; country music; needlepoint.

Deer hunting; target shooting.

A week in the woods during deer season.

Watch *Family Feud*.

Read *Guns & Ammo*.

Icons: Camouflage hunting outfit; professional chain saw.



“When you’re running down our country, man,
You’re walking on the fightin’ side of me.”

– Merle Haggard





YOUNGER SINGLES & COUPLES

– Metropolitan Cities –



URBAN ELITE

Configuration: Mostly singles; some couples.

Average household size—1 person.

Predominant age range of adults—35 to 44; 45 to 54.

Characteristics: Elite career-oriented urban singles and couples.

Well educated—more than two-thirds are college graduates; many have advanced degrees.

Trend-setters.

Youthful executives and professionals in business, finance, entertainment, and education who have achieved success at an early age.

Housing preferences: In-town and downtown big cities—two-thirds live in New York.

Upscale high-rise apartments.

Two-thirds rent their apartments; the rest own coops or condominiums.

Consumption patterns: Few own cars; most travel by taxi or train. But if they do, Ferraris, Alfa Romeos, and Porsches.

Empty refrigerators.

Early adopters—the first to own Palm Pilots, cell phones.

Work hard and play hard.

Watch *Late Night with Conan O'Brien*.

Read *The New York Times*.

Icons: Conan O'Brien; PC banking.



“The only credential the city asked was the boldness to dream.
For those who did, it unlocked its gates and its treasures,
not caring who they were or where they came from.”

– Moss Hart



E-TYPES

Configuration: Mostly singles, some couples just a few years out of college.
Average household size—1 to 2 persons.
Predominant age range of adults—25 to 44.

Characteristics: High-living, high-energy city-dwellers.
Half have college degrees; another quarter attended some college.
Education, exercise and ecology.
E-businesses, information technologies.

Housing preferences: Upscale urban neighborhoods, often near universities.
Half rent; half own city townhouses or apartments.
Median home value is third highest in the nation.

Consumption patterns: Audi 90s, BMWs, Volkswagens.
Everything on-line.
Frequent movers.
Travel—Club Med.
Watch *The Simpsons*.
Read *Scientific American*.

Icons: Bandwidth; Urban Outfitters.



“Are we having fun yet?”
– Bill Griffith



URBAN ACHIEVERS

Configuration: Singles, couples.

Average household size—2 persons.

Predominant age range of adults—25 to 34.

Characteristics: Well-educated upper-middle-class households.

60 percent college graduates.

Ethnically diverse; many are recent immigrants.

Students; professionals in business, finance, and public service.

Housing preferences: Diverse urban neighborhoods.

Half own, half rent townhouses, rowhouses, or apartments.

Housing stock ranges from SROs to ornate \$600,000 townhouses.

Consumption patterns: Transit cards.

Ethnic clubs and restaurants.

Imported food, newspapers, videos and CDs.

Travel extensively.

Watch *Seinfeld* reruns.

Read *Esquire*.

Icons: Running shoes with business suits; credit cards and green cards.



“¿Qué pasa, dude?”

– Greeting



NEW BOHEMIANS

Configuration: Mostly singles; very few couples.
Average household size—1 person.
Predominant age range of adults—20 to 34.

Characteristics: Unconventional, ethnically-diverse, upper-middle-income households.
“Politically correct” college graduates.
The social and political *avant-garde*; one-third are gay.
Executives; students; actors; artists; writers; boutique owners; public-interest advocates.

Housing preferences: In-town and downtown urban neighborhoods.
Three-quarters rent; the rest own flats in brownstones, older apartment houses, and converted lofts.

Consumption patterns: Transit cards.
Trendy nightspots.
Poetry readings and gallery openings.
Risk-tolerant urban appreciators.
Watch *Nightline*.
Read *Interview*.

Icons: Jean-Michèl Basquiat; state-of the-art haircuts.



“Sacred cows make the tastiest hamburger.”

– Abbie Hoffman





YOUNGER SINGLES & COUPLES

– Metropolitan Suburbs –



THE VIPS

Configuration: Couples and some singles.
Average household size—2 persons.
Predominant age range of adults—25 to 44.

Characteristics: Dual-income, dual-career couples.
Nearly three-quarters have attended or graduated from college.
Yesterday: *Fast-Track Professionals*. Tomorrow: *Nouveau Money*.
White-collar professionals: executive vice presidents; department heads;
partner.

Housing preferences: Upper-middle-class neighborhoods just outside the beltways.
New single-family detached homes in brand-new subdivisions close to *Nouveau Money* neighborhoods.
Upscale condos and townhouses in more urban areas.

Consumption patterns: New Lexus.
Downtown commuters.
Financial planning services.
Racquetball; squash.
Watch *News Hour With Jim Lehrer*.
Read *INC*.

Icons: Espresso maker; digital camera.



“Power is the great aphrodisiac.”

– Henry Kissinger



FAST-TRACK PROFESSIONALS

Configuration: Singles and couples.
Average household size—1 to 2 persons.
Predominant age range of adults—25 to 44.

Characteristics: Upper-middle-income households—young suburban professionals.
Type-A college grads.
Career- and lifestyle-oriented techies.
Employed by software and IT companies, communications firms.

Housing preferences: Upscale inner suburbs of large cities.
Upscale condominiums, townhouses, and apartments.
Half own, half rent their residences.

Consumption patterns: New foreign cars; sport-utility vehicles with roof racks.
High-tech electronics.
Exercise equipment and health clubs.
Coffee bars, clubs, microbreweries.
Watch *Saturday Night Live*.
Read *Vanity Fair*.

Icons: REI; Bayliner ski boat.



“Nothing succeeds like success.”

– Alexandre Dumas, père



SUBURBAN ACHIEVERS

Configuration: Ethnically-mixed married couples, a few children.
Average household size—2 to 3 persons.
Predominant age range of adults—25 to 34.

Characteristics: Multi-lingual, multi-ethnic households in the heart of suburbia.
High-school and college graduates.
First- and second-generation immigrants.
White-collar workers looking for upward mobility.

Housing preferences: Older suburbs near the big city.
Just over half own their homes—starter single-family, townhouses, or
condominiums.
The rest are renters in suburban apartment complexes.

Consumption patterns: Used foreign cars.
Jet skis and snowmobiles.
Shopping at the malls.
Commute to downtown.
Watch *Friends*.
Read *Time*.

Icons: In-line skates; ESL classes.



“What’s up?!”

– Greeting



GENERATION X

Configuration: Mostly singles; some couples; single parents with kids.

Average household size—1 to 2 persons.

Predominant age range of adults—22 to 35.

Characteristics: Young adults in a state of transition.

Sixty percent went to college.

Many divorcés/divorcées and single-parents.

Students, teachers, hospital workers, white-collar and clerical employment.

Housing preferences: Sunbelt Boomtowns.

Apartments, townhouses, and modest single-family houses.

Nearly three-quarters are renters.

Consumption patterns: Inexpensive import, such as Hyundai.

Any kind of social situation, including health clubs, evening classes, sports bars, single-parent groups.

Taco Bell and Burger King.

Mountain bikes; beanbag chairs; and milk-crate shelves.

Watch *Saturday Night Live*.

Read *Spin*.

Icons: McJobs; disposable lighters.



“Oh well, whatever, never mind.”

– Kurt Cobain





YOUNGER SINGLES & COUPLES

– *Small Cities/Edge Cities* –



TWENTYSOMETHINGS

Configuration: Mostly singles; couples.

Average household size—1 to 2 persons.

Predominant age ranges—20 to 34.

Characteristics: Middle-income singles and couples.

Recent college graduates who have moved to “edge city” areas to start their careers.

Good pay for a first job in a relatively inexpensive area.

Starter positions in info-tech start-ups, public and private service industries.

Housing preferences: Fast-growing satellite cities; small-city suburbs.

Sixty percent rent units in apartment complexes, as most of these young people have just moved into the area.

The 40 percent who are owners bought starter houses, townhouses, or condominiums.

Consumption patterns: Old Volkos and BMWs.

Take-out, fast food, and happy hour grazing.

Health clubs and night clubs.

Jeans and t-shirts.

Watch *Comedy Central*.

Read *Rolling Stone*.

Icons: Rollerblades; MTV.



“You can’t always get what you want
But if you try sometimes
You just might find
You get what you need.”

– Mick Jagger and Keith Richard



UNIVERSITY/COLLEGE AFFILIATES

Configuration: Mostly singles and some couples (cohabs), few children.

Average household size—1 to 2 persons.

Predominant age ranges—Under 24; 25 to 34.

Characteristics: Half are still in college; half out, often college employees.

Students and college graduates; the highly-educated professionals that teach them.

“Trust Fund Babies,” who get by on their parents’ largesse.

Recent grads who’ve launched start-up companies, white-collar workers.

Housing preferences: College and university towns.

Three-quarters are renters in apartment complexes or houses.

Students often live off-campus.

Consumption patterns: Compact imports such as VW, Toyota.

Wine, beer, and CDs.

College sports and skiing.

ATM card.

Watch *Friends*.

Read *Sports Illustrated*.

Icons: Birkenstocks; Grateful Dead CDs (same as it ever was).



“Youth is wholly experimental.”

– Robert Louis Stevenson





YOUNGER SINGLES & COUPLES

– Agrarian/Rural –



PC PIONEERS

Configuration: Married couples, a few with one or two children.
Average household size—2 to 3 persons.
Predominant age range of adults—35 to 54.

Characteristics: Well-educated urban-exile couples.
Citified rustics with New Age values.
Home-based businesses; or work-at-home, connected to the office via computer modem.

Housing preferences: An hour's drive from the closest metro in scenic rural areas.
Detached residences in small new housing developments, many at cluster densities.
Wood-burning stoves.

Consumption patterns: Pick-up trucks and Jeeps.
Home recycling center, composter.
Home office.
Organic food.
Watch *NBC Nightly News*.
Read *Country Living*.

Icons: Personal website; satellite dish.



“:-)”

– Cyberspace Smile



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