GWINNETT LIVABLE CENTERS INITIATIVE

10 -year Update

Baseline Report

New Ideas
For The Next Level

BOARD OF COMMISSIONERS OF GWINNETT COUNTY GEORGIA

ARC

GWINNETT PLACE COMMUNITY IMPROVEMENT DISTRICT

JACOBS

Bleakly Advisory Group

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1. Introduction

The intent of this Baseline Conditions report is to provide a thorough review of the existing state of the Gwinnett LCI study area from a **quality of life** perspective – including the capacity to handle **diverse** travel modes, **new** housing and employers, and additional **live-work-play** options that can continue to **foster** the Gwinnett Place and adjoining areas as a **sustainable** and **attractive** activity center within Gwinnett County.

A. Study Context

The Gwinnett Livable Centers Initiative (LCI) study area encompasses a critical portion of the I-85 corridor between Pleasant Hill Road and Sugarloaf Parkway and contains two important sub-areas – the Gwinnett Place Mall area and the Gwinnett Arena/Civic Center area. For the purposes of this study, the Primary Tier is the Gwinnett Place Mall area (western portion) and the Secondary Tier is the Gwinnett Arena/Civic Center area (eastern portion). See **Figure 1.1**.

This 12-square-mile study area has long constituted the economic core of Gwinnett County and is framed by the most prominent crossroads in Gwinnett County – the junction of I-85 and GA 316. It plays this prominent role for at least four reasons as described below.

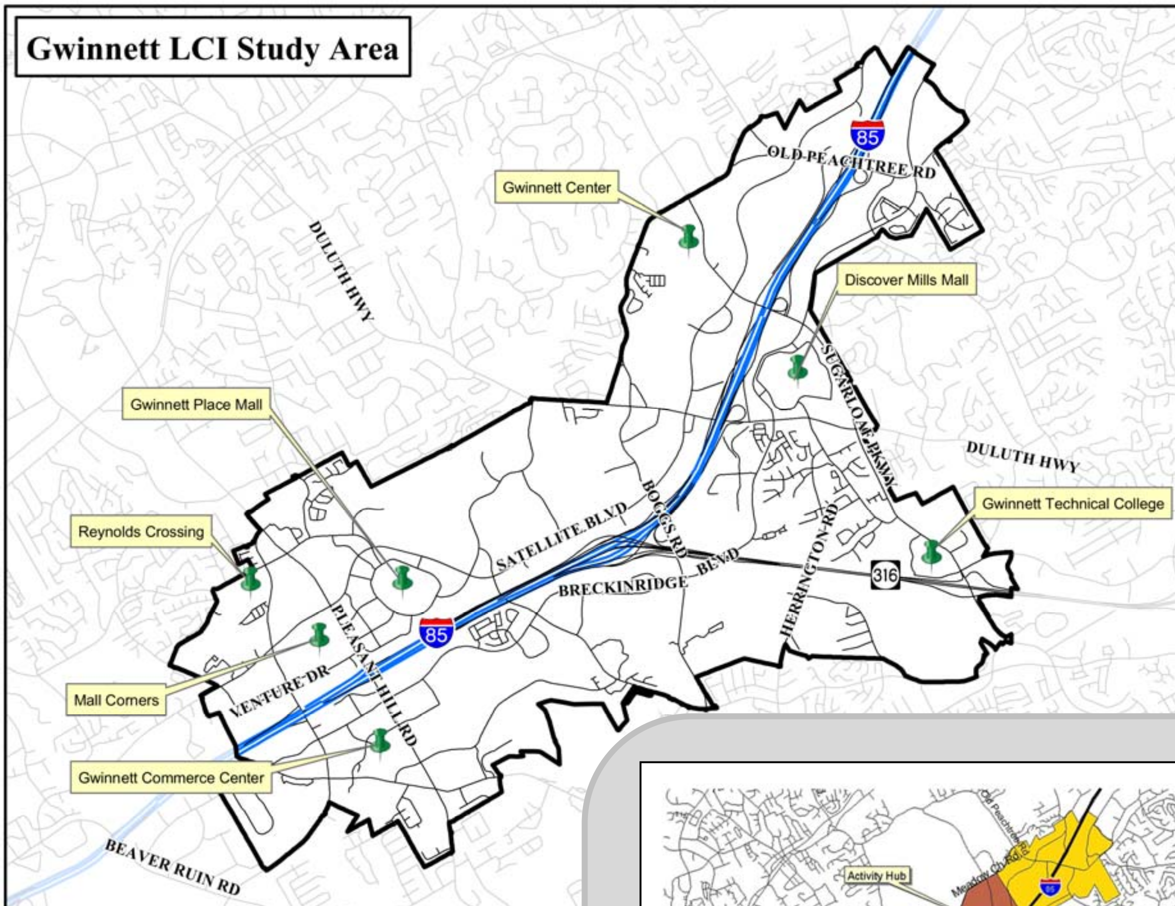
1. Transportation Access

The study area's location near the center of Gwinnett County and the many regional connections to this location provide it great access to the surrounding population and labor force. Most of the study area is within five minutes of an interchange with one or both of two freeways - I-85 and GA 316. These freeways bisect the study area in the shape of a wishbone. I-85 carries over 230,000 vehicles per day and is now twelve lanes wide as it passes under Pleasant Hill Road. The GA 316 corridor is a very heavily traveled route for statewide traffic from I-285 to Athens, with approximately 85,000 vehicles per day just east of I-85.

The study area is also served by two of the busiest east-west arterials in the region – Pleasant Hill Road and Sugarloaf Parkway, which respectively carry approximately 50,000 and 30,000 vehicles per day within the study area.

With the leadership of the Gwinnett Place CID, funds are now being committed to build a new diverging diamond interchange bridge on Pleasant Hill and I-85—one of the first in the southeast United States. A potential light rail transit system is being studied to serve the heart of the study area and an Alternatives Analysis under the federal New Starts program is also underway.

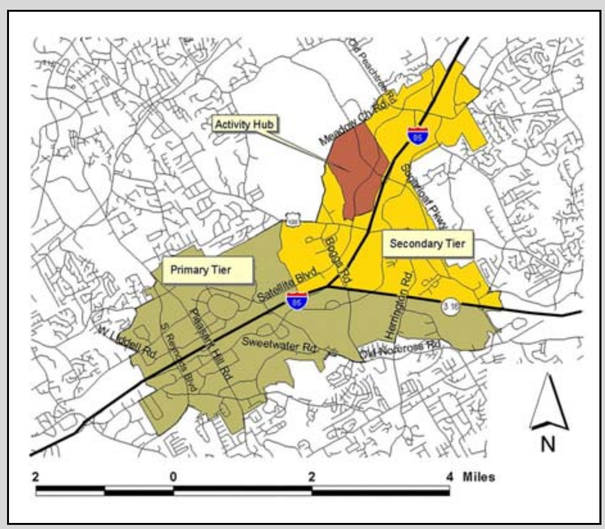
Figure 1.1



2. Economic Impact

The Gwinnett Place Activity Center accounts for a significant share of the entire Gwinnett County economy. Almost 500,000 people live inside or within a five-mile radius of this study area. This trade area makes it the pre-eminent business location in the northeast quadrant of the Atlanta region. However, many socioeconomic changes are taking place:

- Both the commercial development and housing stock are aging.
- There is rapidly increasing racial and cultural diversity.



Primary & Secondary Tiers of Study Area

- Both the housing and retail markets are in transition – portions of the study area are facing economic stagnation and are in critical need of fresh redevelopment strategies.

- Two newer malls (Discover Mills and Mall of Georgia) are now competing with Gwinnett Place.
- There are too few “rooftops” in the immediate area for economic growth.

Although there are a number of economically distressed properties in the study area, there are also signs of renewal in a new form that is responding directly to the changing marketplace and using the demographic transition as an opportunity. This provides evidence that there is positive economic value that only needs to be properly channeled.

3. Land Use

The study area contains a number of important office parks, shopping centers, businesses, and community institutions. At present, major destinations are split by the gulch formed by the two freeways and the heavy traffic on Sugarloaf Parkway and Pleasant Hill Road. There is a need for better local circulation for non-auto travel in these corridors. There are also several key parcels – large, now vacant commercial properties that, if redeveloped in a new way, could provide the catalysts needed to drive significant land use changes for the better.

Although there is housing in the area, little housing can be found within a convenient walk from the employment, shopping or services in the area. For a strong housing market, it will be necessary to add new housing that is attractive to the “X” and “Y” generations and also to seniors who will form the majority of new households in the next ten years – part of a Lifelong Communities approach to good community design.

4. Leadership

The strong and determined leadership of the Gwinnett Place CID is a crucial factor to leveraging these resources for the revitalization of the economy in this unique place. Over the past five years, the Gwinnett Place CID has provided the proactive base of operations that has brought the business community and public sector together to share the necessary costs of planning, designing, and constructing the improvements needed to restore the strength of this area to serve as the “downtown core” of Gwinnett County for the 21st century. Many studies have already been prepared by the Gwinnett Place CID and Gwinnett County (see **Chapter 2**). There is a strong desire by the leadership to update these plans, set priorities for the next five years, and locate funding for implementation.

An improved activity center offers abundant possibilities for Gwinnett County, the Gwinnett Place CID, local businesses, area neighborhoods, and other surrounding communities. For example, enhancing transit linkages and pedestrian connections between the major retailers, office parks, and neighborhoods would improve mobility, employment, and shopping options for the study area’s residents and businesses. In conjunction with attractive, safe streetscapes, the transit improvements could reinforce the activity center’s image as a business and service destination of choice.

Appropriately-scaled, transit oriented, mixed-use developments can support a vital live-work-play center, while also reducing auto dependence. Innovative redevelopment of housing and retail through public-private partnerships can help re-weave the social fabric of the community. Traffic management, multi-modal improvements and urban design strategies can reclaim the activity center for people. Clearly defined gateways at major interchanges of I-85 and SR 316 can signal renewal and sense of place. Greater involvement of the stakeholders should yield a greater collaboration in support of the study area's new functions and image.

The Gwinnett Place Activity Center, the primary focus of the study area, has great potential for redevelopment long-term vitality. Given recent economic and demographic shifts, the time for initiating proactive change in this study area is urgent. The timing of the Gwinnett LCI 10-Year Update could not be better.

B. Purpose of Study

The purpose of this 10-Year Update is to update and refresh the original 2001 "Connect Gwinnett" LCI Study by evaluating the changed context, identifying new needs, and clarifying opportunities—particularly as they relate to economic development, land use, transportation, and urban design. The ultimate goal is to solidify new ideas for the next level. While the study area is the same, the context and needs of the area have evolved, as original study recommendations have been implemented and other changes to the area have occurred—including new development, new regulatory changes, and increasing diversity of the area's population.

Major policy changes since the original study include: the adoption of Gwinnett County's 2030 Unified Plan, including policy recommendations consistent with the stated goals of the LCI program; new zoning districts and processes that integrate recommendations of the 2001 study; and greater focus on the need for more transit options. Please see **Chapter 2** for more details on existing plans, studies, and regulations.

The 10-Year Update will place new focus on the principles of "green communities" and lifelong communities. The latter of which is a phrase coined by ARC to describe places that offer a high quality of life and opportunities to both the young and the old and everyone in between. The Update will also emphasize economic development, redevelopment, and enhancing transportation options.

The 10-Year Update will achieve the LCI Program goals as defined by the Atlanta Regional Commission (ARC), who identifies the following primary goals of the LCI Program:[1]

- Encourage a diversity of mixed-income residential neighborhoods, employment, shopping and recreation choices at the activity center, town center and corridor level.
- Provide access to a range of travel modes including transit, roadways, walking and biking to enable access to all uses within the study area.
- Develop an outreach process that promotes the involvement of all stakeholders.

[1] Source: Atlanta Regional Commission. *2011 Livable Centers Initiative Implementation Report*.

C. Methodology

Analysis of Existing Conditions

This Baseline Conditions Report provides a detailed analysis of each of the following major planning areas:

- Real estate (**Chapter 3**)
- Land use (**Chapter 4**)
- Transportation (**Chapter 5**)
- Urban design (**Chapter 6**)

Each of these elements was evaluated by considering the findings and recommendations provided in existing and past studies and also reviewing new data available as a result of land use and real estate changes, new and ongoing public investments, and the overall changing context, influenced by the metropolitan Atlanta economy and overall demographic shifts. The work effort included site visits, review of secondary data, discussions with area stakeholder and experts, and synthesis of new information collected.

Chapter 2 provides a broad summary of existing plans and **Chapter 7** identifies implementation issues associated with shortcomings in achieving the original 2001 Study recommendations.

Ultimately, the Base Conditions Analysis was intended to provide a critical knowledge transfer of lessons learned. The Baseline Conditions report is one of the first of several milestones in carrying out and completing the 10-Year Update to the Study. Other major activities include Visioning and Scenario Development, Concept Plan Development, and Final Study Recommendations.

Visioning & Scenario Development

This process provides a needed bridge from understanding and educating the community on existing conditions and leaping forward to the probable and preferred outcome or vision for the area. Several activities contribute to this:

- Stakeholder Interviews – Meetings held with real estate interests within the study area.
- Core Team – A group of stakeholders meeting throughout the process to flesh out the big ideas and guide the planning process.
- Community Design Workshop – Two day workshop to facilitate scenario discussion.

A key goal of the LCI update is to arrive at an understanding of the cumulative preferred future outcome or vision for the study area.

Concept Plan Development

The concept plan will provide an updated graphic depiction of the vision for the study area – including desirable development prototypes, recommended transportation improvements, and urban design recommendations. It will reflect the major findings and recommendations from the Baseline Conditions Report and visioning and scenario development activities

Final Study Recommendations

Final recommendations will be delivered in the form of a Final Study Report and Master Plan (a finalized version of the Concept Plan). Associated steps include:

- Open House – Presentation of final report recommendations; provides an opportunity for the public to provide final comments on the plan.
- Approval of the Final Report and recommendations by ARC.
- Adoption by the Final Report by the Gwinnett County Board of Commissioners.

Most sources of community pride start with an idea, a vision, and then a plan, implementation steps, and the will to make it happen.

2. Existing Plan Assessment

A. Development since the 2001 "Connect Gwinnett" LCI Study

This section addresses development activity in the Connect Gwinnett LCI Study area in two subsections. The first concerns development activity the private sector. The second section summarizes public improvements made in the study area since 2001.

1. Private Projects

For purposes of evaluating historic development trends, the Gwinnett County Department of Planning and Development divides the county into seven Planning Areas. The Planning Area that best approximates the Gwinnett LCI Study area is the Duluth/ Suwanee Planning Area. The table below outlines the total building permits, total housing units, and total square feet for non-residential building permits issued in the Duluth/Suwanee planning area for the years 2001-2010. These totals are compared to the Gwinnett County yearly totals. Over the past 10 years, the number of permits, housing units, and the total non-residential square footage has declined significantly, with steady overall decline from 2005-2010.

Table 2.1 Duluth/Suwanee Planning Area Permits, Housing Units, & Non-residential Square Footage

	Duluth/ Suwanee Planning Area			Gwinnett County Total		
	Total Permits	Housing Units	Non-Res. Sq. Ft.	Total Permits	Housing Units	Non-Res. Sq. Ft.
2001	789	750	1,139,887	8,831	9,453	4,248,857
% County	8.9%	7.9%	26.8%			
2002	815	773	1,832,861	8,715	9,316	6,263,917
% County	9.4%	8.3%	29.3%			
2003	911	840	968,928	8,393	8,562	4,790,206
% County	10.8%	9.8%	20.2%			
2004	809	764	1,010,389	8,682	8,753	4,793,445
% County	9.3%	8.7%	21.1%			
2005	777	733	1,011,473	8,582	8,261	5,470,630
% County	9.1%	8.9%	18.6%			
2006	543	489	1,174,266	6,976	7,793	5,703,673
% County	7.8%	6.3%	20.6%			
2007	244	206	718,514	3,890	3,640	5,350,058
% County	6.3%	5.8%	13.4%			
2008	115	471	1,406,377	1,369	1,529	4,150,404
% County	8.4%	30.8%	33.9%			
2009	43	34	298,544	558	554	1,315,328
% County	7.7%	6.1%	22.7%			
2010	72	63	54,280	826	1098	406,911
% County	8.7%	5.7%	13.3%			

Source: Gwinnett County Planning and Development Department.

i. Total Permits

Consistent with the County trend, the total number of building permits for the Duluth/Suwanee planning area has also dropped over the past 10 years, with the greatest decline beginning after 2005—however, the share relative to the county total has remained relatively stable with an average of 8.6%.

ii. Housing Units

The total number of housing units in Gwinnett County also began a sharp decline after 2005—and Duluth/Suwanee's percent share of the County's total declined as well, with the exception of 2008. In 2008, Duluth/Suwanee's total housing units suddenly rose to 471 units, which accounted for over 30% of the County's total units. (The 2008 Development Activity Report states that 400 of these were attributable to one apartment complex). After this jump in 2008, the total housing units dropped into the double digits and accounted for approximately 6% of the County's total housing units for 2009 and 2010. Duluth/Suwanee's 6% County share in 2009 and 2010 is lower than its 2001-2010 average share of 9.8%. Some of the largest residential developments to occur in the study area during the period 2001-2010 included:

2001 – Wesley Herrington Apartments – Herrington Road – 376 units (Multi-family)

2003 – Breckinridge Development – Breckinridge Boulevard – 399 units (Mixed use)

2004 – Highway 120 Tract Homes – SR 120 (Duluth Highway) 130 units (SF Subdivision)

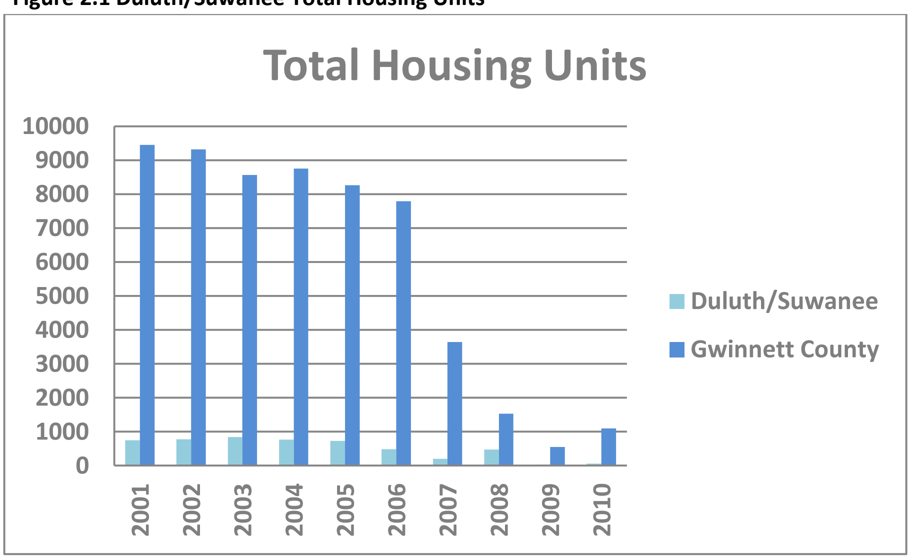
2005 – Menlo Creek Apartments – Satellite Boulevard – 372 units (Multi-family)

2005 – Riverdance Townhouses – Satellite Boulevard – 142 units (Multi-family)

2005 – Brentwood at Sugarloaf – SR 120 (Duluth Highway) – 251 units (SF Subdivision)

2005 – Brookhaven at Sugarloaf – SR 120 (Duluth Highway) – 140 units (Multi-family)

Figure 2.1 Duluth/Suwanee Total Housing Units



Source: Gwinnett County Planning and Development Department.

iii. Non-Residential Square Footage

As with the County's totals, the total square feet for non-residential building permits in Duluth/Suwanee held steady until 2009, when Duluth/Suwanee's total non-residential square footage experienced a 78.8% drop. The County's total dropped significantly as well; therefore, Duluth/Suwanee's non-residential square feet still accounted for almost 23% of the County's total. On average for the years 2001-2010, Duluth/Suwanee's non-residential square footage accounted for approximately 22% of the County's total. With only a 13.3% share in 2010, this number is significantly lower than the average.

Examples of the larger non-residential developments to be approved in the study area during the period 2001-2010 included:

2001 – Satellite Place – Satellite Boulevard – 274,000 sq. ft.

2002 - Huntcrest Office – North Brown Road – 170,190 sq. ft.

2002 - Fry's Electronics – Breckinridge Boulevard – 144,100 sq. ft.

2003 - Shawnee Ridge – Satellite Boulevard – 135,050 sq. ft.

2004 – Asian Business Center – Steve Reynolds Blvd. – 121,116 sq. ft.

2004 - Newpoint Commons – Breckinridge Boulevard – 167,850 sq. ft.

2005 – Intellicenter Atlanta Offices- Sever Road - 158,514 sq. ft.

2005 – Northmont Building 700 & 900 – Northmont Parkway – 355,000 sq. ft.

2005 – Best Software – North Brown Road – 162,160 sq. ft.

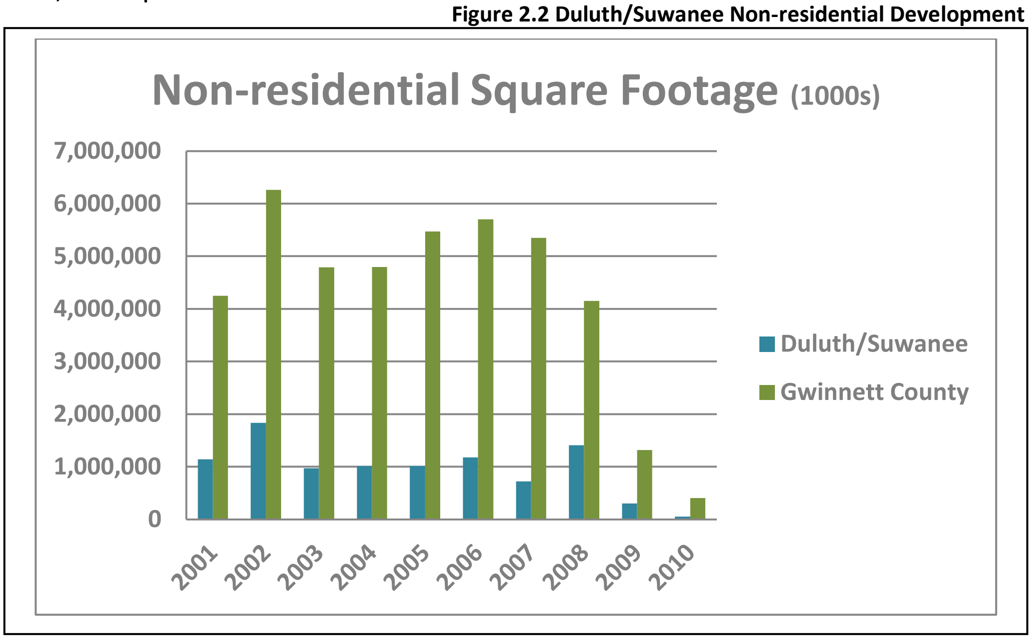
2006 – Gates at Sugarloaf – Satellite Boulevard – 204,834 sq. ft.

2006 – Paragon at Satellite – Satellite Boulevard – 211,014 sq. ft.

2006 – Georgia Baptist Convention Headquarters – Sugarloaf Parkway – 139,000 sq. ft.

2007 - Embassy Suites Hotel – Satellite Boulevard - 205,971 sq. ft.

Figure 2.2 Duluth/Suwanee Non-residential Development



Although not a “new” facility, the NCR Headquarters made development news in April, 2010 when it announced that it was moving 1,250 employees from Dayton, OH to its offices on Satellite Boulevard. NCR already occupied about 150,000 square feet at its Satellite Boulevard operation, but leased an additional 100,000 to 200,000 square feet at that facility.

Additionally, Primerica recently announced its plans to relocate to a new 350,000-square-foot headquarters in Gwinnett County. This new development will be located near Ga. 120 and Meadow Church Road.

2. Public Projects

Gwinnett Center

Known as The Gwinnett Civic and Cultural Center when it opened in 1992, Gwinnett Center changed its name after The Arena and Grand Ballroom opened in 2002 and 2003. It was one of the projects built with funds from a four-year sales tax approved by voters in 1988. Gwinnett Center has four major areas:

- *The Arena at Gwinnett Center* is a 13,000 seat state-of-the-art facility perfect for events from Broadway shows to ECHL hockey games to music concerts in the round.
- *The Convention Center* offers exhibit space, meeting rooms, and a Grand Ballroom. Anchoring the Convention Center is the 50,000 square foot Exhibit Hall. The Exhibit Hall is host to trade shows, conventions, concerts, and sporting events. The Convention Center has 23 meeting rooms that can accommodate up to 1,000 attendees for business gatherings, seminars, elegant banquets and receptions.
- *The "five-star" Grand Ballroom* is the crowning touch for the Convention Center. The 21,600 square foot Grand Ballroom also meets the demand for additional exhibit and break out space.
- *The Performing Arts Center* is the ideal place to showcase stage productions, musical performances or civic events. The 702-seat theatre setting provides excellent visibility and acoustics from anywhere in the house.

A Master Plan for Gwinnett Center was completed in 2007. It envisions expanding the Convention Center to 125,000 sq. ft., including a food court, enlarging the Performing Arts Center to 1,200 seats, constructing a full service hotel with 450 rooms on site suitable for tradeshows, and constructing parking decks for the Hotel and Arena. Three new driveway entrances are also contemplated, including two new entrances from Satellite Boulevard and a new entrance from Meadow Church Road, which would be created by extending Premiere Parkway. Internal traffic circulation improvements are also being studied.

Club Drive Park

Gwinnett County Parks & Recreation dedicated their 40th County park, Club Drive Park, on Tuesday, December 2, 2008. The 25 acre park is located east of the intersection of Club Drive with Pleasant Hill Road and features a lake, fountain, pier, multi-purpose trail, picnic tables, basketball court and playground.

Transportation Projects

Traffic congestion has long been a primary issue and concern in the LCI Study area. Gwinnett County Department of Transportation, along with Georgia DOT, the Atlanta Regional Commission and the Gwinnett Place CID have collaborated on a long list transportation improvement projects that are summarized here.

I-85 / SR 316 interchange reconstruction

The $147 million project included construction of 13 bridges, including two flyover structures, widening to add HOV lanes, and construction of more than 10 miles of new collector-distributor lanes. Opened to traffic October 2008.

I-85 HOV lanes

23.6 miles of High Occupancy Vehicle lanes opened on I-85 in Gwinnett County on October 31, 2001. These lanes are currently being converted to High Occupancy Toll lanes.

Pleasant Hill Road ATMS

Installation of fiber and other communication infrastructure from US 29 (Lawrenceville Highway) to US 23 (Buford Highway), 2011.

Satellite Boulevard ATMS

Installation of fiber and other communication infrastructure from SR 378 (Beaver Ruin Road) to SR 317 (Lawrenceville Suwanee Road), 2008.

Old Norcross Road ATMS

Installation of fiber and other communication infrastructure from Breckinridge Boulevard to SR 120 (Pike Street), 2008.

Illuminated Street Sign project

In December, 2009 the CID installed the first phase of illuminated street signs on traffic light mast arms in the District. Additional illuminated signs are planned.

Traffic Signal Timing Project

During January 2009 the CID funded a detailed evaluation of traffic signal timing along major corridors in the Gwinnett Place business community that helped improve the efficient flow of traffic in the district. The project included equipment upgrades, retiming of traffic signals along Pleasant Hill Road. This project is on-going with monthly maintenance checks and corrective actions.

Pleasant Hill Road median painting project

Completed July 19, 2007 along Pleasant Hill Road to improve safety and visibility of medians.

CID’s various sidewalk projects

Gwinnett Place CID's first sidewalk project was Venture Parkway completed April 2006.

Gwinnett Place CID sidewalk installation project along Crestwood Parkway from Pleasant Hill Road to Pineland Road was completed on July 2006.

Pleasant Hill Road / Venture Parkway area was landscaped in July 2006.

The CID installed a sidewalk along the entire length of Market Street, which extends from Satellite Boulevard to Venture Parkway on August 2006.

The CID installed sidewalks on Satellite Boulevard between Commerce Avenue and Tandy Key Lane in October 2007.

In December 2008 the CID completed a sidewalk project along Old Norcross Road in front of Atlanta Toyota. It extends east along Steve Reynolds Boulevard to the rear entrance of Atlanta Toyota. This project provides safe and convenient pedestrian access from Atlanta Toyota and other businesses on the north side of Pleasant Hill Road to the new Kroger and other stores located at Reynolds Crossing.

During February 2009, the Gwinnett Place CID completed a sidewalk project along the Old Norcross Road extension between Satellite Boulevard and Ring Road This project provides safe and convenient pedestrian access from the Bus Transit Hub on Satellite Boulevard to Gwinnett Place Mall.

<u>I-85 interchange landscaping projects</u>

In Fall 2007, the CID funded preparation of the I-85 Interchange Beautification Landscaping Plan and implemented Phase I which landscaped the Pleasant Hill Road and Steve Reynolds Boulevard Interstate access ramps, framing a “front door” into the greater Gwinnett Place area to welcome those visiting and working in the district. During January and February 2009, the CID implemented Phase II of the plan to landscape the northbound ramp exit and southbound collector-distributor lanes at the Pleasant Hill Road interchange, funded by the Georgia Department of Transportation's GATEway program.

<u>Commerce Avenue Plaza Park and Gwinnett Place's First Gateway</u>

In December 2006, the CID transformed a vacant and neglected “right of way” and utility area into a gathering place for people. The plaza park is a valuable asset in this first phase of the Satellite Boulevard Streetscape Master Plan that will guide the beatification and renovation of Satellite Boulevard from Steve Reynolds Boulevard to Old Norcross Road. This pocket park functions as a gateway into the CID area and is the first of several designated gateways. Park amenities include lighting, seating areas, sidewalks, plantings/trees and grassy open spaces for gatherings, picnics and recreational activities.

<u>Local Bus Service</u>

Gwinnett County Transit was formed in 2000 to provide express, local and paratransit services for the people of Gwinnett County. Express bus service operates Monday through Friday and includes six routes using the HOV lanes on I-85. Local bus service operates five routes Monday through Saturday connecting neighborhoods and businesses to Gwinnett County's many cultural, shopping and educational opportunities. Paratransit service for qualifying persons with disabilities operates in conjunction with the local bus service.

Gwinnett County Transit provides local bus service to much of the southern portion of the I-85 corridor including service to Norcross, Duluth, Lawrenceville, Buford, the Gwinnett Place Mall area, the Discover Mills Mall area, and the Mall of Georgia area. Service is along four routes with headways ranging from 15 minutes to 30 minutes in the peak period.

Commuter Bus Service

In addition to local service, Gwinnett County Transit, along with the Georgia Regional Transportation Authority (GRTA), provides commuter bus service in the County. Gwinnett County Transit offers three commuter bus routes in the peak direction and three in the reverse commute direction. These routes originate at the I-985 Park and Ride lot, the I-85 Indian Trail Park and Ride lot, and the Discover Mills Park and Ride lot and serve Downtown and Midtown with headways ranging from 10 minutes to 30 minutes. GRTA also offers four routes. Two of the routes originate at Discover Mills and one of the routes terminates service at the Lindbergh MARTA station.

Since completion of the Gwinnett LCI Study in 2001, Gwinnett Transit service has been improved. A transit center was created adjacent to Gwinnett Place Mall, where transfers can be made among four of the five routes. A 562-space park and ride lot was completed in 2004 at the I-85/ Sugarloaf Parkway interchange. The Park and Ride lot serves as the northern terminal point for the Gwinnett Transit express routes, two local routes, and one GRTA Express route. These transit upgrades are a critical element of the LCI area, serving both a local and regional transit-dependent population that make up a large proportion of the workforce for the Gwinnett Arena, Gwinnett Civic Center, and area hotels.

Major Projects in Planning Stages

HOV to HOT Conversion

On October 2, 2011, the Georgia DOT initiated a major interstate traffic management project on I-85. It converted the existing High Occupancy Vehicle (HOV) lanes to High Occupancy Toll (HOT) lanes and provided priority capacity that is priced according to congestion levels on the interstate highway. The first HOT lanes span from Chamblee Tucker Road to Old Peachtree Road on I-85. Additionally HOT lanes will be implemented along SR 316 between its intersection with I-85 and Riverside Parkway.

Transportation Plan for Gwinnett Place CID

The Gwinnett Place CID Board of Directors has identified traffic congestion and efficient traffic flow and management as priority issues. In order to clearly identify the best projects to mitigate traffic congestion and enhance the efficient flow of traffic in the district area, the Gwinnett Place CID, along with funding from the Gwinnett County Board of Commissioners, completed a comprehensive transportation study to determine viable traffic relief strategies that could be implemented. The planning effort includes a detailed set of projects for connectivity, traffic operations, pedestrian facilities, transit improvements and signage.

I-85 / Pleasant Hill Road interchange modifications

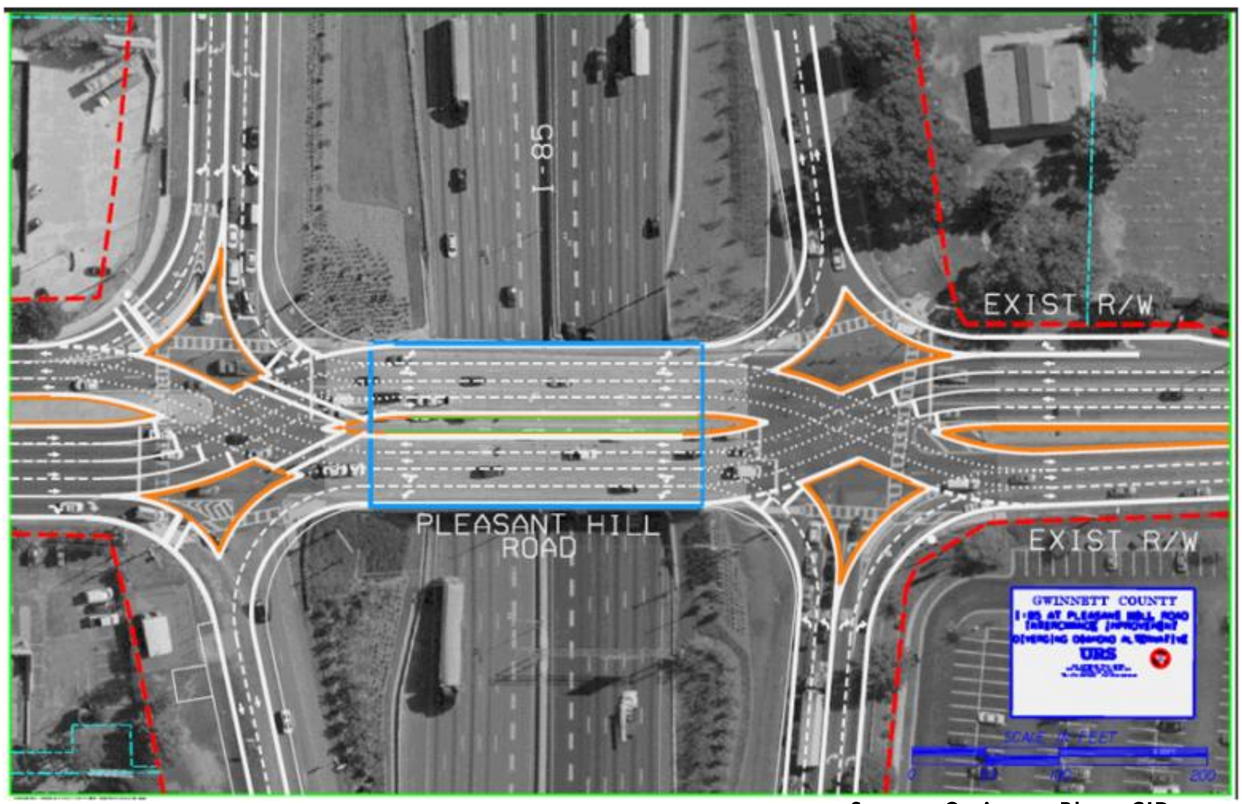
Improvement of the I-85/Pleasant Hill Road Interchange is the CID's highest priority project. The CID is currently implementing a short-term approach that would enhance the traffic mobility at the I-85 interchange- the Diverging Diamond Interchange (DDI).

A diverging diamond interchange will use the existing bridge, but redirect traffic flow to a more efficient pattern. Lanes for two directions of traffic on the non-freeway road will cross over to the opposite side on both sides of the bridge at the freeway. Traffic will briefly travel on the *opposite* side of the road from what they are accustomed. The DDI allows for two-phase operation at all signalized intersections within the interchange. See **Figure 2.3**.

This is a significant improvement in safety, since no left turns must clear opposing traffic and all movements are discrete, with most controlled by traffic signals. The proposed Pleasant Hill Road DDI will accommodate more traffic and move it faster, decrease congestion, and increase safety.

This is an interim solution with the long-term goal being to completely replace the existing interchange with a single point urban interchange (SPUI) that would greatly enhance mobility and safety in this heavily congested corridor and require only one traffic signal. The project has recently received approval from the Federal Highway Administration on the Interchange Modification Report, which is the first step in replacement of a bridge over an Interstate.

Figure 2.3 Proposed I-85/Pleasant Hill Road Interchange Modifications



Source: Gwinnett Place CID

Redesign of Pleasant Hill Road/Gwinnett Place Drive/Venture Drive intersection

In 2009, the CID prepared a Traffic Impact Study for the implementation of access management along Pleasant Hill Road and the re-construction of Venture Drive, which has an intersection that is dangerously close to the I-85 interchange. Now the CID proposes to relocate Venture Drive to intersect with Gwinnett Place Drive at Pleasant Hill Road in a new location to the north, aligned with Gwinnett Place Drive in order to improve safety and operations on Pleasant Hill Road and increase connectivity. In addition to the intersection realignment, plans call for Venture Drive to be widened to five lanes, a two-way center left turn lane, and upgraded pedestrian facilities. Preliminary engineering was completed in fall 2010. Meetings with property owners and representatives were held in November 2010 and April 2011.

New Overpass North of Pleasant Hill Road

As shown in **Figure 2.4**, one option for providing additional access into the area that was identified in the Gwinnett Place CID Transportation Plan is to construct another overpass across I-85. In the future, once outside funding is secured, the CID will oversee a feasibility study to develop a conceptual plan and profile for a proposed overpass north of Pleasant Hill Road to connect Venture Parkway and Breckinridge Blvd. The study will provide:

- a conceptual plan and profile of a potential overpass
- an overview of the feasibility of the project and possible constraints
- necessary steps to be take for the coordination with Georgia DOT, Gwinnett County DOT, and others.

Figure 2.4 Pleasant Hill Road Overpass

Source: Gwinnett Place CID

West Liddell Road/Club Drive Connector
This planned project involves a new alignment and overpass at I-85 North. Construction is planned for 2018-2030 at an estimated cost of $39 million.

Streetscape and Landscape Improvements

Pleasant Hill Road Streetscape Projects

The Georgia Department of Transportation is providing Transportation Enhancement (TE) grant funds to implement the streetscape projects on Pleasant Hill Road. The first phase of streetscaping will begin in early 2012 with the acquisition of right of way and easements for installation of new sidewalks and pedestrian-friendly elements from Venture Parkway to Satellite Boulevard. Concept plans were developed for the second phase of streetscaping enhancements from Club Drive to Breckinridge Boulevard, with construction planned for early 2012.

Satellite Boulevard Streetscape Projects

The CID Board of Directors has adopted the final plans for installing decorative street lamps, benches, trashcans and landscaping to accompany new sidewalks along Satellite Boulevard connecting the Gwinnett Transit Center to Tandy Key Lane. During 2010, concept plans were developed and construction plans are now being reviewed by the Georgia Department of Transportation. It is anticipated that the Satellite Boulevard, Phase One project will be under construction in early 2012. In June 2011, the CID was awarded $450,000 in TE grant funds to begin planning and constructing the Satellite Boulevard, Phase Two streetscape project.

Source: Gwinnett Place CID

Planned Transit Improvements Along the I-85 Corridor

The I-85 corridor remains one of the most congested corridors in the Atlanta region. New mobility options are needed to improve connectivity between major activity centers in Gwinnett and provide a high capacity transportation alternative to automobile travel. In order to help improve the quality of life and the livelihood of Gwinnett County and other metro Atlanta residents, communities, businesses, and the environment, a light rail transit study was conducted to address these needs.

The I-85 Corridor Light Rail Transit Feasibility Study was initiated in September, 2008 to evaluate the technical and financial viability of a light rail transit (LRT) line in Gwinnett County. The project co-sponsors, Gwinnett Village Community Improvement District and Gwinnett Place Community Improvement District, began the study to explore the potential benefit of serving the I-85 corridor with light rail transit. The proposed LRT system would enhance connectivity both within Gwinnett County and throughout the region by interfacing with the MARTA rail system at a proposed intermodal station in Norcross. This study also contributes to the region's vision for a comprehensive transit network that serves not only local Gwinnett County citizens, but also commuters throughout the Atlanta metropolitan region who travel to the I-85 corridor for employment, shopping and entertainment. LRT will provide much needed congestion relief and spur economic development, making Gwinnett an even more attractive place to live, work and play.

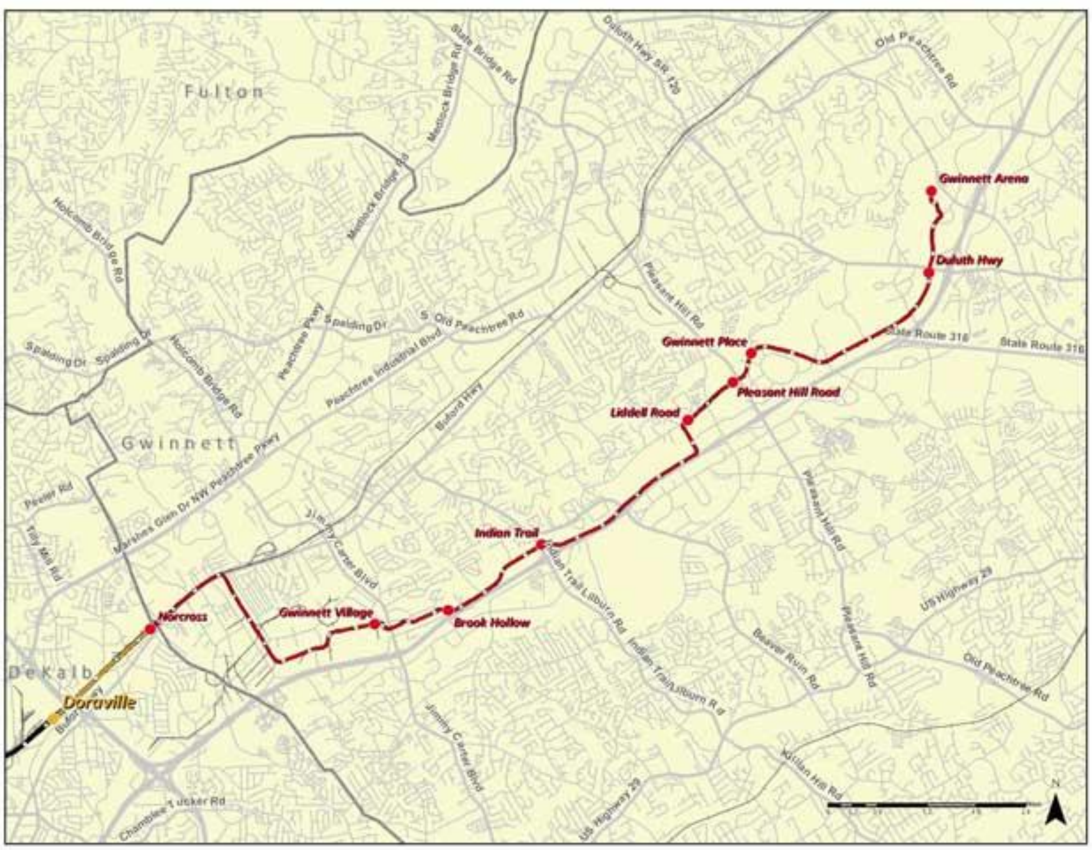
Source: Gwinnett Place CID

LRT was initially determined as the recommended transit mode. Light rail provides a balance between heavy rail transit (i.e. MARTA rail) and streetcar, as it offers operating speeds and capacity that can compete with heavy rail at a fraction of the cost to build. The I-85 Corridor LRT system is approximately 14 miles in length with limits extending from a proposed intermodal station in Norcross, northeast to the Gwinnett Center to serve the Performing Arts Center, Convention Center and Arena. Nine potential stations have been identified to directly serve office, retail and residential in the corridor. The anticipated travel time on a light rail train from end to end is approximately 30 minutes. By 2030, the ridership for the I-85 Corridor LRT system is projected to be 11,000 riders per day.

The primary funding for fixed guideway transit projects is the federal Section 5309 New Starts program. It is a highly competitive discretionary grant program administered by the Federal Transit Administration (FTA). The next phase required for continuing in the federal New Starts process is to conduct an Alternatives Analysis (AA) study and this process began in mid-2011.

Projects funded through the FTA New Starts program must undergo lengthy New Starts Planning and Development processes, as well as an Alternatives Analysis. Such a project typically takes anywhere from 6 to 12 years to complete.

Figure 2.5 Proposed Light Rail Transit for I-85 Corridor



Source: Gwinnett Place CID

B. Planning since the 2001 "Connect Gwinnett" LCI Study

Since 2001 when the "Connect Gwinnett" Livable Centers Initiative Project was completed, many planning and implementation studies and projects have been completed through partnerships between Gwinnett County, the Gwinnett Place Community Improvement District, the Atlanta Regional Commission, the Georgia Department of Transportation, and MARTA. It is quite possible that this is the most studied and planned area of Gwinnett Count—and, since its inception in March 2005, the Gwinnett Place CID has been the principal initiator of both the planning and project implementation process.

Below is a brief listing and synopsis of these planning efforts and the resulting projects.

Gwinnett County LCI 5-Year Update

This 5-Year Update report was a requirement of the Atlanta Regional Commission for all recipients of Livable Centers Initiatives Study funds. It reviewed the conditions of land use, development, and transportation infrastructure in the study area at the time. In summary, the 5-year Update states the following:

"Completed actions and developments consistent with the goals of the Atlanta Regional Commission's LCI program have taken place throughout the study area, and future implementation projects could be implemented throughout the study area, including the Secondary Tier (Gwinnett Place area)."

In terms of land use patterns in the Primary Tier (Civic Center area), the 5-year Update reported on the success of the Civic Center and surrounding corporate office development, but cited the area's prevailing low density housing pattern as one of the greatest obstacle. Most residential development in the area is not connected or convenient to employment centers or commercial centers. The 5-year Update predicts that "unless density increases, and residential is integrated into the mix of uses, a thriving livable center is unlikely."

The 5-Year Update also relates that the most serious obstacle to making progress towards LCI goals in the Primary Tier (Civic Center area) is the lack of a 'champion' and the lack of collaboration between organizations in the area. The report suggests that the Gwinnett DOT and Gwinnett Center have not acted as advocates to pursue implementation strategies and recommended projects from the LCI study. While the Gwinnett DOT and Department of Planning and Development collaborated to prepare Traffic Calming Guidelines, a similar effort to prepare guidelines for pedestrian mobility and access management has not occurred.

Additionally, the 5-Year Update recommends that the Secondary Tier area (Gwinnett Place area) be "ground zero" for high-rise development and points to the formation of the Gwinnett Place CID and the Gwinnett Transit Hub near the Gwinnett Place Mall as justification. Completed actions to support this premise are the zoning amendments creating two new zoning districts: High Rise Residential (HRR) and Mixed Use Development (MUD). Nonetheless, the Update notes that financial institutions do not appear ready to finance mixed use developments in the area.

In terms of the transportation network in the Primary Tier area (Civic Center), the 5-year update reports that although the area is still “automobile-centric,” with large surface parking lots and fragmented pedestrian infrastructure, Gwinnett Transit now has a 562 space park and ride lot adjacent to Discover Mills on Sugarloaf Parkway. Additionally, there is a bike lane on Sugarloaf Parkway.

At the end of the 5-Year Update is an inventory of accomplishments. This inventory outlines the transportation projects listed in the 2001 LCI plan and reports progress on each project. Some transportation projects were added or redefined. For instance, the two proposed transit/pedestrian overpasses of I-85 were eliminated and the pedestrian underpass of I-85 at Sugarloaf Parkway was transferred to Long Range due to costs.

Additionally, implementation of a new “perimeter sidewalk plan” and “park and ride lot connector sidewalk” replaced some other pedestrian projects. The update pushed forward the engineering and construction dates of the various greenway and trails projects in the study area and did not report on the status of the housing initiatives and other implementation strategies identified in 2001.

Gwinnett County 2030 Unified Plan

The Gwinnett County 2030 Unified Plan was adopted in February, 2009 and replaced the previous Gwinnett County Comprehensive Plan 2020, which was adopted in 2002 and updated in 2005.

The new comprehensive plan was named the Unified Plan because it combined and coordinated the update of the Comprehensive Plan with the Gwinnett County Consolidated Plan for housing and community development, as well as the Comprehensive Transportation Plan. The Comprehensive Plan was found to be consistent with the Atlanta Regional Commission’s Regional Development Plan, as well as the Local Planning Standards of the Georgia Department of Community Affairs. It also won an award from the Georgia Chapter of the American Planning Association.

The 2030 Unified Plan was based on an extensive public involvement process focused on solutions to four primary issues:

- The approaching "buildout" of the county;
- The increasing need for redevelopment;
- Increased congestion, but decreased highway funding; and
- The increasing diversity of the county's population.

The planning process included extensive evaluation of existing data, projected trends, and regional forecasts. It also featured extensive public involvement that directed local visioning and policy considerations Five planning themes or future goals were emphasized:

1. Maintain Economic Development and Fiscal Health
2. Foster Redevelopment
3. Maintain Mobility

4. Provide More Housing Choice
5. Keep Gwinnett a 'Preferred Place'

The recommendations of the plan were crafted from weighing the implications of three possible scenarios for the future:

1. Middle of the Pack Scenario that was based on continuation of momentum following the patterns and trends of growth, development and investment that were prevalent in the recent past.
2. Regional Slowdown Scenario that considered the consequences to Gwinnett County of an overall slowdown in the regional economy.
3. International Gateway Scenario that anticipates an acceleration of regional growth within the Atlanta Region with a diverse international population attracted toward Gwinnett County as its economy builds a more tech-based and service-based foundation.

The recommended policies of the 2030 Unified Plan are based primarily on the Middle of the Pack and International Gateway Scenarios with a future population of over one million persons and an employment base of almost 500,000 jobs. In all three scenarios, and in the recommended plan, the Gwinnett Place area is recognized as an important regional center and the Civic Center/Arena area is also recognized as a supporting center.

All scenarios indicated an increased level of congestion and a need for substantial transportation investments. While the Middle of the Pack scenario was fiscally constrained, the International Gateway Scenario included extensive public transportation improvements including a potential extension of rapid transit service to the Gwinnett Place area, HOV facilities with tolls along I-85, and a "super-arterial" along Satellite Boulevard.

The Future Land Development Map is an important component adopted as part of the 2030 Unified Plan and serves as a guide for future land use changes and necessary zoning amendments. According to the Future Development Map, the Gwinnett Place area and the Gwinnett Civic Center area would be two of four Regional Mixed Use Centers in Gwinnett County and would be considered key locations for future transit lines.

According to the Future Development Map, Regional Mixed Use Centers would be characterized by intense development and redevelopment, using incentives to encourage both horizontal and vertical mixtures of residential, office and commercial uses in patterns that integrate high density development with open space. Minimum residential density is set at 30 dwellings per acre. Non-residential development density is recommended to be up to 2.0 Floor Area Ratio (FAR) with greater density allowed in return for desirable amenities, including significantly increased open space and LEED certified buildings. The Unified Plan also envisioned the use of transferable development rights to further increase the density of development proposals in Regional Mixed Use Centers.

Several other implementation policies of the 2030 Unified Plan that are related to the future development of the Gwinnett LCI study area include:

- Institute a variety of redevelopment incentives and bonuses
- Enhance development aesthetics through use of design standards
- Protect large well-located parcels for office use through proactive rezoning
- Obtain an appropriate balance of retail
- Provide venues to celebrate growing cultural diversity
- Preserve existing workforce housing
- Establish a more extensive transit system
- Improve walkability of activity centers and neighborhoods
- Provide incentives for neighborhood parks and enhanced open space/trails dedication
- Promote shared infrastructure facilities such as stormwater ponds and parking decks
- Create Transit Oriented Development at appropriate sites through proactive zoning
- Establish a road connectivity requirement for new development
- Support expanded housing opportunities for seniors
- Use Tax Allocation Districts (TAD) to promote mixed use development or redevelopment

These policies are reinforced with recommendations to amend the Gwinnett County 1985 Zoning Resolution and rezone property using mixed use development zoning districts.

Gwinnett County Comprehensive Transportation Plan (CTP)

The CTP provides both technical and policy-based direction for planning Gwinnett's transportation facilities in accordance with the ARC Regional Transportation Plan and Transportation Improvements Program. The Gwinnett CTP is based on an assessment of the county's long term growth and makes recommendations for all transportation modes, including roadway projects, transit routes, bicycle amenities, and pedestrian facilities.

Together with the Unified Plan's Land Use Element, the CTP examines alternative land use and transportation scenarios that outline transportation investment strategies consistent with the likely land use and economic development future of the County. Transportation alternatives considered a full range of transportation improvements and strategies that would enhance the mobility, accessibility and safety performance of the County's transportation system.

Alternatives were evaluated using state of the art modeling techniques to compare performance in terms of safety, capacity, congestion relief, costs, funding, and maintenance to the year 2030. The CTP also included extensive public involvement to provide Gwinnett County with a plan to accommodate travel demand through the year 2030. It is not surprising that expansion of road capacity and improved traffic operations top the list of priority projects. This plan, however, also recommends improvements in other modes of transportation, such as transit, bicycles, and walking.

Gwinnett County Open Space and Greenway Master Plan

This plan was adopted by the Board of Commissioners in May 2002 to promote the following primary goals:

- Increase recreation opportunities
- Protect and improve water quality
- Increase connectivity via a system of greenway trails
- Reduce environmental impacts of development.

Some of the recommendations that are relevant to the update of the Gwinnett LCI are

- The county should examine the feasibility of establishing a system for the Purchase of Development Rights focused on acquiring easements for stream banks and floodplains
- The county should consider providing incentives for development projects that provide a public access greenway consistent with the Greenway System Plan.
- The county should work to increase public awareness of the economic and quality of life benefits of mixed-use development, greenways, and higher density residential developments.
- The county should consider providing redevelopment incentives
- The county should consider a program to provide highway buffers.

The projects in the Open Space and Greenway Master Plan emphasize implementation of three primary trail corridors: the Ivy Creek, Harbins, and Sweetwater Creek Greenways. The plan does not reflect the greenways and trails that were identified in the *Connect Gwinnett* LCI study and does not prioritize the implementation of the Sweetwater Creek Greenway located within the study area.

In addition to these recommendations, this plan includes an assortment of typical design standards and location criteria that might affect future projects within the LCI study area.

Gwinnett County Zoning Ordinance Amendments

Since the *Connect Gwinnett* LCI Study in 2001, Gwinnett County has made a series of amendments to the 1985 Zoning Resolution responding to interest in mixed-use development. The following is a summary of these amendments.

High Rise Residential District

The High Rise Residential (HRR) district was the first zoning district to be approved in Gwinnett County that allowed multifamily development to be constructed at a density exceeding 13 units per acre. Its use was restricted to the Major Activity Centers identified in the 2005 Comprehensive Plan (the study area would be one). The standards of the HRR district include:

- Maximum height: 25 stories, and 300 feet
- Mixed use permitted: Up to 40% accessory retail, commercial and office uses
- Setbacks: front yard reduced to 10 feet and side and rear yards reduced to 0 feet

- Buffers: buffer next to residential use varies from 50 ft. to 200 ft.
- No design standards; no open space requirements.

One property in the Gwinnett LCI study area was zoned HRR, but that property has not been developed.

As proposed, the Bella Verde HRR development had the following features:

- 4.7 acre site fronting on Steve Reynolds Boulevard
- 2 towers, maximum 25 stories
- 283 dwellings at 58 dwelling units per acre
- 112,000 Sq. ft. retail
- 630 parking spaces (80% in deck)

A second proposal in 2006 (RZM-06-029), which was ultimately not approved, sought to construct two 25 story residential towers (with 312 multifamily units at 77 units per acre) in the parking lot of the Gwinnett Place Mall. In addition to the residential towers, the proposal sought to build a five story office building on a base of retail space and a parking deck for 868 vehicles.

Mixed Use Redevelopment District

The Mixed Use Redevelopment (MUR) district was adopted in 2002. It requires either vertically or horizontally mixed uses (office, residential and/or commercial) subject to an approved Concept Plan for a site of at least 10 acres, where all but 25 percent of the proposed development takes place as redevelopment of previously developed properties. The standards of the MUR district include:

- Permits a variety of residential uses including zero lot-line, live-work, lofts, and multifamily residential
- Maximum residential density 32 units per acre; height limits as per underlying zoning
- A single land use can represent only 75% of land area
- Minimum of 20% common area (includes sidewalks and plazas)
- Minimum 75 ft. buffers where mixed use abuts residential on the perimeter
- Shared parking and on-street parking is allowed
- Reduced setbacks
- Architectural design standards are included

As of yet, the MUR district has not been applied to any property. However, an application was denied in 2007 to construct the Atlanta Global Station, a 42 acre development on Pleasant Hill Road at Satellite Boulevard. This mixed use development proposal sought to redevelop the sites of two older strip shopping centers – Gwinnett Station and Gwinnett Prado. The proposed development consisted of a convention center with a 320 room hotel, 1,294 multi-family residential units, 524,000 sq. ft. of office space, 552,000 sq. ft. of retail space, and 7,850 parking spaces. Not including the parking, the proposed density was approximately 80,000 sq. ft. per acre.

Mixed Use Development Ordinance

The MUR district was amended in 2006 to create the MUD - Mixed Use Development district. The MUD, like the MUR is limited to locations on Major Thoroughfares and redevelopment of sites within Major Activity Centers. Development standards parallel the MUR standards and also require an approved Concept Plan.

In 2006, the Board of Commissioners also enacted the “70% rule,” which limited residential density to 32 units per acre of residential land use and limited the residential component of a mixed use project to no more than 70% of the gross site acreage, exclusive of common area.

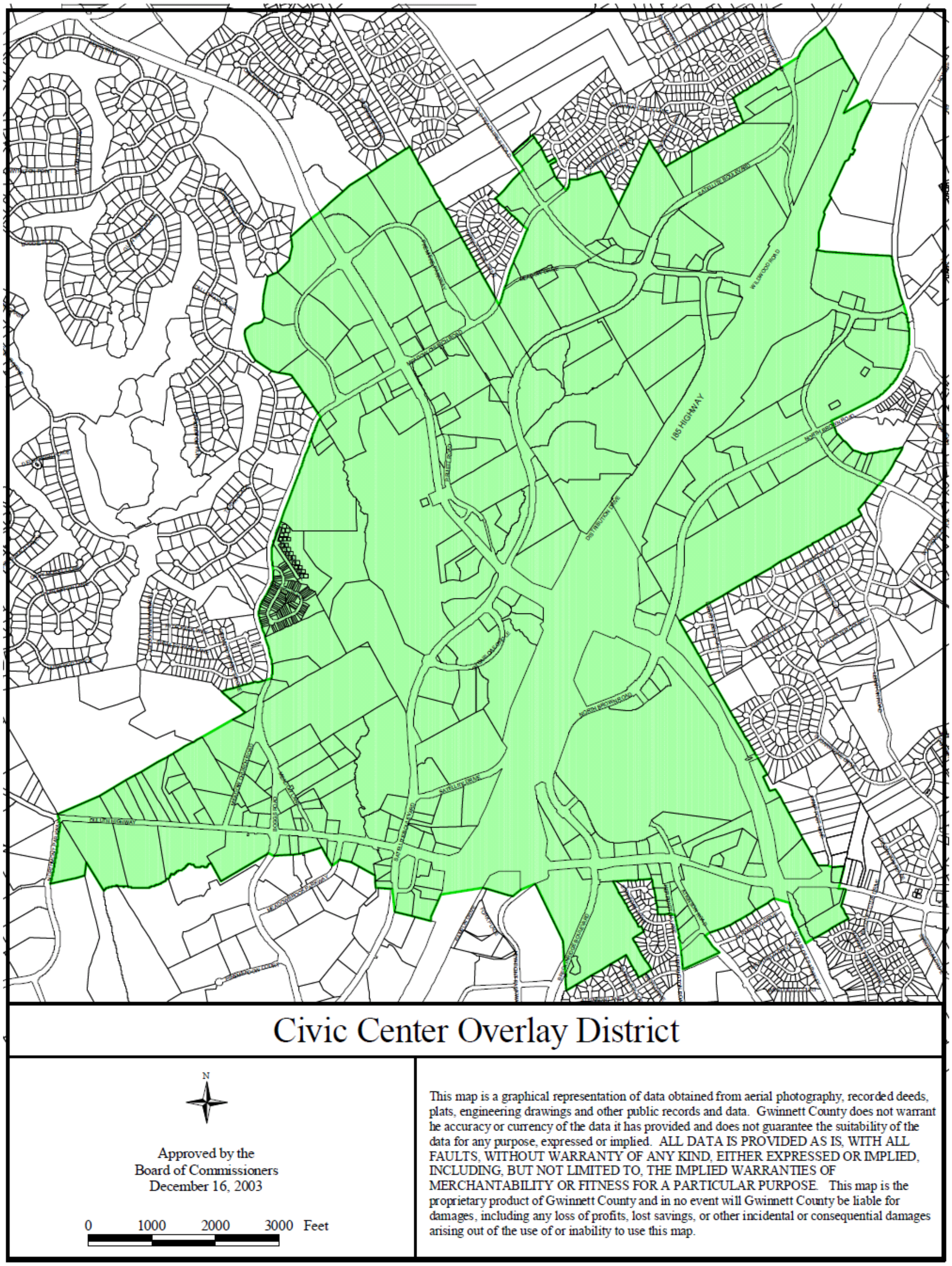
Mixed-Use Overlay District

In 2008, the Board of Commissioners renamed the Mixed-Use Redevelopment Overlay to become the Mixed Use Overlay (MUO) District.

Civic Center Overlay District

The Civic Center Overlay was adopted in December 2003 and provides urban design standards to guide new development in the area centered on the I-85 / Sugarloaf Parkway interchange, including the Gwinnett Center and a large portion of the Primary Tier of the original LCI study area. The Civic Center Overlay is a sub-set of the larger Section 1315 – Activity Center Overlay. The provisions of the overlay require streetscapes for major thoroughfares, including underground utilities, sidewalks, decorative lighting, benches, landscaping, sign controls, reduced building setbacks, and Architectural Design Standards. See **Figure 2.6** for a map of the boundaries of the Civic Center Overlay District.

Figure 2.6 Civic Center Overlay District



Source: Gwinnett County

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Gwinnett County Unified Development Ordinance

Gwinnett County is currently in the process of preparing a new Unified Development Ordinance that will update and combine the provisions of the 1985 Zoning Resolution, the Development Regulations, and a number of supporting development-related ordinances of Gwinnett County. It will incorporate a number of new zoning districts and overlay districts, along with Architectural Design Standards and Development Guidelines to encourage mixed-use development and walkable neighborhoods.

Of particular interest to this project is the proposed Urban Center Form-Based Overlay District that is proposed for the Gwinnett Place area. It will be patterned in large measure on the proposed CID-RAD ordinance and will allow horizontally and vertically mixed use development.

Gwinnett County is also investigating the feasibility of a Transfer of Development Rights program that will encourage use of the Gwinnett Place area as a receiving area for development rights in order to further intensify the area and prepare it for possible regional transit service.

ARC Lifelong Communities Initiative

The rapid growth of the older adult population demands new and diverse housing options, transportation alternatives, and community designs that promote active living. Therefore, the Atlanta Regional Commission (ARC) sponsored the Lifelong Communities Initiative that brings together design, architecture, planning, aging, and health experts to craft master plans. These plans are designed to meet the needs of the aging population, while at the same time attracting people of all ages. Gwinnett Place is one of the project sites selected by the ARC.

By exploring ways to integrate housing for older adults into existing Gwinnett Place area neighborhoods, the initiative illustrated the opportunities this demographic shift will bring. The Final Report focuses on the core principles of creating a Lifelong Community: connectivity, good pedestrian access and transit, neighborhood services and retail, opportunities for social interaction, an array of dwelling types, community design that promotes active living, and consideration of existing residents. The report shows how each of the sites studied by the design team incorporate the principles into its master plan.

Studies by the Gwinnett Place CID

The Gwinnett Place CID was organized in March of 2005; however, in previous years, the County Planning and Development Department and Gwinnett County's Revitalization Task Force played an active role in developing planning studies that have a direct impact on the Gwinnett Place business community.

Gwinnett Place Area Redevelopment Plan

"Gwinnett Place Mall has the opportunity to become a vibrant mixed use regional center or 'mini city' and a metro core that serves as an anchor for Gwinnett County. It has the potential to evolve into a significant concentration of office space, higher density housing, a variety of retail formats, all in an

aesthetically appealing environment with the support of appropriate and necessary infrastructure, pedestrian and automotive mobility." -- Gwinnett County Revitalization Taskforce, 2004

A comprehensive redevelopment strategy has been created by the CID to chart future land use, pedestrian/traffic circulation options, infrastructure, urban design, and steps necessary for stimulating reinvestment in the area. Priorities for the plan include:

- Attractive, unified design theme
- Connective improvements
- Public places and green spaces
- Parking management structures and share parking options
- Area wide storm water facilities
- Transit-oriented, mixed-use developments

CID-RAD Ordinance

During 2008, the CID utilized LCI funds provided by the Atlanta Regional Commission to complete a redevelopment district ordinance with the goal of breaking the economic cycle of disinvestment using flexible incentives.

Input from stakeholders and property owners, as well as county officials, developers, and other business representatives, was included in the writing of a redevelopment ordinance for the area. The proposed ordinance, jointly composed and submitted by the Gwinnett Place and Gwinnett Village CIDs, is under evaluation with the staff of Gwinnett County government. The ordinance is intended to offer design standards and density incentives, as well as other tools to bring new life to key areas.

Gwinnett Place TAD

Initiated by the CID, Gwinnett County has created a Tax Allocation District (TAD) for Gwinnett Place. The CID's Board of Directors recognizes TADs as one of the most powerful economic development tools to help boost revitalization. Area property owners also understand that a TAD can help them achieve their redevelopment vision for the future.

Gwinnett Place TAD Goals:

- Increase transportation accessibility and mobility options and improve traffic flow
- Expand and strengthen the area by building on its current successes, accessibility and central location in Gwinnett
- Increase the viability of live, work and entertainment choices within the Gwinnett Place area
- Provide a major component of the funding for the new bridge for Pleasant Hill Road/I-85 interchange
- Make streetscape enhancements to improve the experience of shoppers, residents, and visitors
- Provide funds to support site-specific development activities including site preparation, environmental remediation, and the construction of structured parking facilities to support redevelopment.

Gwinnett Place Parking Management Study

Funded by a grant from the Atlanta Regional Commission, the Gwinnett Place CID commissioned a parking management study to examine current and future parking issues in the greater Gwinnett Place area. The study examines not only the current situation, but is also forward-thinking and addresses challenges that may occur as the area redevelops. The document offers a proactive approach to ensuring that parking will play a positive role in the redevelopment of the area and not detract from it. It provides guidance for the appropriate application of strategies through a public-private partnership, including shared parking, on-street parking, and locating large shared parking decks at central locations.

Gwinnett County Walkable Communities Workshop

Sponsored by the Atlanta Regional Commission and Gwinnett County, the Gwinnett Place CID was the site for a Walkable Communities Workshop. The workshop focused on developing strategies to make communities safer and more inviting for pedestrians and bicyclists. As a direct result of the recommendations developed during the Workshop, new sidewalks were installed throughout the area.

Gwinnett Place Mall Pilot Study

Gwinnett County's Revitalization Task Force commissioned a study titled: Gwinnett Place Mall Pilot Study as one of three studies conducted in Gwinnett County for areas identified by the Task Force as needing revitalization. The study includes very comprehensive short-term and long-term recommendations in these key areas: enhanced mobility, need for updated development policies, capturing job growth, promoting diverse housing, promoting high-quality design and integrating County plans for parks and green space.

Signage and Way-finding Master Plan

Together with the Gwinnett Department of Transportation, the CID completed a multi-year, multi-million dollar signage and way-finding master plan as part of an overall “branding campaign” designed to enhance Gwinnett Place’s overall image.

Phase III of the master plan includes the construction of ten directional signs along and around Pleasant Hill Road, four more gateway monuments along Steve Reynolds Boulevard, Old Norcross Road, and Satellite Boulevard; 15 illuminated street signs attached to existing traffic signal mast arms and branding 17 medallions at six intersections in the CID; and “Welcome” banners along Crestwood Parkway, Shackleford Road, Breckinridge Boulevard, Market Street, and Old Norcross Road.

Currently, the Gwinnett Place CID Board is reviewing plans for another gateway monument into the district, additional secondary gateway monuments, vehicular directional signage, and more illuminated street signs at many major intersections along Pleasant Hill Road.

Gwinnett Citizen Survey

The Gwinnett Place CID continues to plan, prioritize, and execute major decisions aimed at revitalizing the Gwinnett Place area. The focus of a recent survey was to determine how those revitalization efforts are perceived and to identify which solutions are actually being requested by the public.

C. 10-Year Action Plan Review

Table 2.2 below provides the Report of Accomplishments for the ten year period 2001-2011 for the Gwinnett Livable Centers Initiative plan. It reports the status and implementation schedule for all projects that were either slated in the 2001 LCI plan as 5-year priority projects or outlined in the implementation strategies section. Some of the projects have been modified based on the LCI 5-Year Update prepared for ARC by Gwinnett County in 2006.

It is obvious from the previous section of this report that much has been accomplished in the LCI Study area. The major public investment in the northern end of the study area, the Primary Tier for the original LCI study, was the completion of Gwinnett Center and an extensive perimeter sidewalk system surrounding the Center.

In the southern end of the study area, now the Primary Tier, the formation of the Gwinnett Place CID and Tax Allocation District has enabled a very extensive degree of public improvements. The CID has been the instigator of many of the major improvements and used its technical and financial support to leverage substantial public investments. However, the majority of these projects were not included in the 2001 LCI study, but were determined from priorities set by the Board of Directors of the Gwinnett Place CID.

REPORT OF ACCOMPLISHMENTS

Table 2.2 Gwinnett County LCI – 10 Yr Update September 2010

Transportation Initiatives				STATUS				
Project	**Description**	**PE Year**	**Construction Year**	**Complete**	**Underway**	**Not Started**	**Not Relevant**	**Notes**
I-85 Crossing 1 Transit/Ped.Bridge	Over I-85 south of Old Norcross Rd.	2005	2006				x	
I-85 Crossing 2 Transit/Ped.Bridge	Over I-85 south of Old Peachtree Rd.	2006	2007				x	
I-85 Crossing 2	underpass of I-85 along Sugarloaf Parkway	2006	2007				x	Determined to be infeasible ($3 million cost); funding used to construct sidewalks at perimeter of Gwinnett Center and on Sugarloaf Parkway.
Satellite Reliever	Northmont-Commerce Connector to Sugarloaf Pkwy	2005	2007			x		
Connector Streets	Reconstruct in existing developments	2003	2005			x		
Connector Streets	New Construction	2003	2005			x		
Streetscape Improvements	Sugarloaf Parkway and Satellite Blvd	2003	2004		x			Partially completed.
Sidewalks in Overlay District	Inside 1500 ft. radius around GTS bus stops	Annual	Annual			x		
Roadway								
Pedestrian Underpass 150'	Satellite Boulevard	2010	LR			x		SPLOST
Intersection improvements	Safety	2007	2008	x				LCI Implementation Grant/ SPLOST
Sidewalks in Overlay District								
Perimeter Sidewalk Plan	5' Sidewalks	2007	2008	x				LCI Implementation Grant/ SPLOST
Park & Ride Lot Connector	Sidewalk	2007	2008	x				LCI Implementation Grant/ SPLOST

Transportation Initiatives (continued)	STATUS	

Project	Description	PE Year	Construction Year	Complete	Underway	Not Started	Not Relevant	Notes
Multi-Use Path/Trail A-A’	Trail through open space	2010	2008			x		
Multi-Use Path/Trail B-B’	Trail through open space	2010	2008			x		
Multi-Use Path/Trail C-C’	Trail through floodplain	2010	2008			x		
Multi-Use Path/Trail D-Z	Trail along road	2010	2011			x		
Multi-Use Path/Trail E-E’	Trail through parking lot of Arena/Civic Ctr	2007	2008				X	
Multi-Use Path/Trail E’-F’	Trail along road	2007	2008				X	
Multi-Use Path/Trail E’-G	Trail along road	2010	2011				X	
Multi-Use Path/Trail G-H	Trail along proposed Satellite reliever	2010	2011				x	
Multi-Use Path/Trail GG-GG’	Trail connector to Shorty Howell Park	2008	2011			x		
Multi-Use Path/Trail H-H’	Along proposed Transit-Pedestrian Bridge Connector	2008	2011				x	
Multi-Use Path/Trail A’-A”	Through private easement	2010	2011			x		
Multi-Use Path/Trail P-JJ	Trail along road	2010	2011				x	
Multi-Use Path/Trail J-J’	Along proposed Transit-Pedestrian Bridge Connector	2010	2011				x	

Transportation Initiatives (continued)				STATUS				
Project	**Description**	**PE Year**	**Construction Year**	**Complete**	**Underway**	**Not Started**	**Not Relevant**	**Notes**
Multi-Use Path/Trail K-K”	Trail through open space	2008	2009				x	
Multi-use Path/Trail L-K”-M	Trail along road	2008	2009				x	
Multi-use Path/Trail CC-N’	Trail along Duluth Highway	2008	2009				x	
Multi-use Path/Trail O’-P	Trail along road	2008	2009				x	
Multi-use Path/Trail V-V’	Trail through private easement	2007	2008			x		
Multi-use Path/Trail Q-Q’	Along Herrington Road	2008	2009				x	
Multi-use Path/Trail B’-R	Trail along road	2008	2009				x	
Multi-use Path/Trail T-T’	Along McDaniel’s Rd. to new park	2007	2008			x		
Multi-use Path/Trail A’-AA Satellite Blvd	Demonstration Site N. of Sugarloaf Pkwy	2004	2005				x	
Multi-use Path/Trail Y’-O Civic Center along floodplain	From Satellite Reliever to Sugarloaf Pkwy.	2004	2005				x	
Multi-use Path/Trail R-EE’ Singleton Crk	Singleton Crk Trail to Old Norcross Road	2005	2006				x	
Multi-use Path/Trail G-EE’ Singleton Crk	From Singleton Creek To McDaniel F. Park	2005	2006				x	
Multi-use Path/Trail W-W’ Sweetwater Crk	From McDaniel Farm Park across SR 120	2005				x		
Multi-use Path/Trail BB-BB’	Trail on street	2007					x	

Housing Initiatives				STATUS				
Project	**Description**	**PE Year**	**Construction Year**	**Complete**	**Underway**	**Not Started**	**Not Relevant**	**Notes**
Promote Job-Housin g Balance	Set goal of 1 housing unit for 1.5 jobs and/or institute mixed-use zoning to make sure that zoning would not preclude this balance		2002			x		
	Perform research to identify housing options and prices that are appropriate to the types of jobs in the activity center		2003		x			Recommended in Unified Plan.
Promote housing choices	Allow Accessory Units in single-family housing stock within the study area		2012		x			UDO project is proposed to allow this,

Other Local Initiatives				STATUS				
Project	**Description**	**PE Year**	**Construction Year**	**Complete**	**Underway**	**Not Started**	**Not Relevant**	**Notes**
Park/Greenspace/ Trail Head	New county park site on eastern end of study area	2004	NA					
Prepare Activity Center Plan	Activity Center Guidelines in Comprehensive Plan	2002			x			Unified Plan began to look at this. UDO project will further define.
	Adopt LCI Overlay District Ordinance	2002			x			Proposed for UDO project.
	Hire development review staff to administer overlay ordinance	2003					x	One new staff was hired in the development review section in 2003 to review final plats and wait on customers. I don't think it was to review and administer Activity Center Corridor Overlay's specifically. No new staff can be hired due to hiring freeze.
Make new transportation connections	Prepare multi-modal access/connectivity plan for Overlay District	2003		x				Multi-modal plans were required as a result of a zoning condition if a large scale project was in for rezoning (it was not Activity Center Corridor Overlay District specific)
Amend Development Regulations	Standards for multi-modal streets (transit/bike/ped)	2002		x				There was an amendment to the Development Regulations in October 2002 to require Concept plans in Mixed Use Redevelopment (MUR). If a site was rezoned MUR it may have a zoning condition to require multi-modal streets but zoning research would need to be done for that time period to determine such.
	Street connections and interparcel access	2002		x				The Development Regulations were not amended but the Zoning Resolution was amended in 2005 to require inter-parcel access
	Multi-modal access plans	2002		x				Required only by zoning condition
Transportation Connections	Feasibility study for transit-pedestrian bridges	2004				x		DOT
Increase transportation options	Prepare a phased operations plan for a transit circulator	2005				x		DOT

Other Local Initiatives(continued)

Project	Description	PE Year	Construction Year	STATUS: Complete	STATUS: Underway	STATUS: Not Started	STATUS: Not Relevant	Notes
Amend Zoning Resolution	Design Standards for TOD and provide incentives	2012			x			UDO project
	Incentives for implementing travel demand measures (TMA)	2004					x	Clean Air Campaign accomplishes TMA goals
Greenway and Open Space Plan	Refine conceptual plan for greenways and trails	2003				x		Concept planning expected to begin in fall 2011
Amend Zoning Resolution and Develop. Regs.for LCI Overlay District	Flexible landscape standards to encourage open space and conservation of significant greenspace areas.	2002		x	x			CSO adopted in Zoning Resolution in May of 2011. CSO revised in March 2004 to require primary and secondary conservation space dedication.
	Limit impervious surfaces, maximum parking ratios, require pervious surface for excess parking	2002		x	x			Zoning Resolution, Article X revised September 2005 to reduce impervious surface by reducing driveway widths, parking stall size, and require pervious surface when surplus parking is proposed. Being revised with UDO project.
Forge new public-private partnerships for Economic Development and Public Finance within the study area	Form a CID	2003		x				Gwinnett Place Mall CID
	Reorganize Development Authority to promote economic development in the LCI area	NA				x		
	Investigate feasibility of CID and Devel. Authority to finance parking structures serving multiple property owners							
	Form a TMA	2004					x	Clean Air Campaign accomplishes TMA goals
	Hire a van pool coordinator to work with the TMA	2004					x	Clean Air Campaign accomplishes TMA goals

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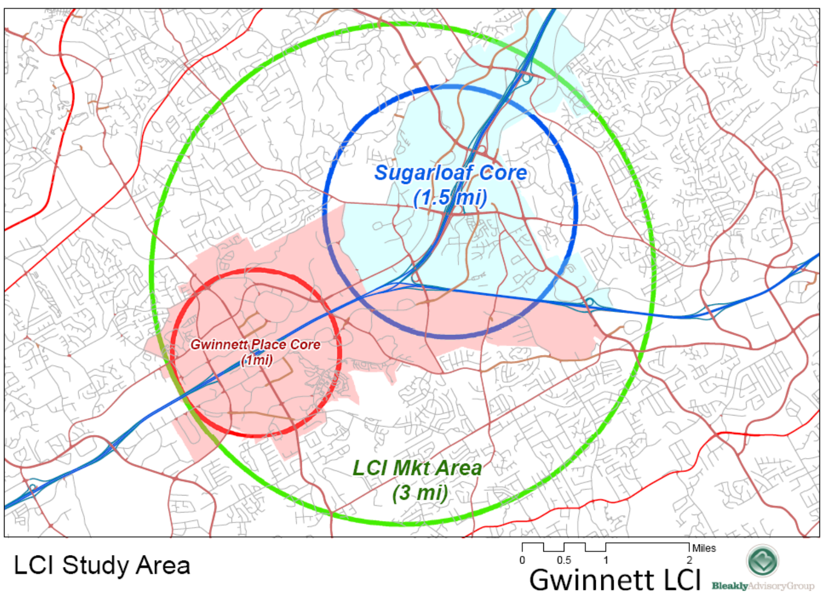
3. Real Estate Market Analysis

As part of the Gwinnett Livable Centers Initiative (LCI) 2011 Update Study, this Market Analysis chapter provides an inventory and assessment of real estate and demographic trends affecting historical and future development patterns in the study area. This analysis provides a framework for the consulting team's recommendations regarding land use and development policy recommendations in the future. Additional figures, tables, and supporting data are located in the Market Analysis Appendix.

Figure 3.1: Study Area Radii for Demographic Analysis



Source: BAG

A. Demographics and Household Characteristics

Population Growth

- The LCI study area's population in 2010 was 81,348 up from 27,615 in 1990.
- The LCI area has experienced phenomenal growth in the 1990s. Population in the LCI study area increased at an overall rate of 8.1% annually in the 1990s, with the Sugarloaf Core expanding even more rapidly, at a rate of 10.6% rate annually.
- If the study area were incorporated, it would be the 9th largest city in Georgia, between Roswell and Albany.

- Population growth slowed dramatically from 2000 to 2010, growing at a 2.8% annual rate since 2000, slightly ahead of the region's 2.5% growth rate.
- Population in the area is projected to continue to increase at a steady 2.2% over the next five years, still exceeding county-wide, region-wide and State-wide growth. The study area population is projected to grow to 103,000 by 2020.
- There are approximately 29,500 households in the LCI study area, with 3,170 households in the Primary Tier and nearly 5,000 in the Secondary Tier. The remaining households are located in residential neighborhoods outside of the two COREs, at the edges of the study area.
- Roughly one-in-ten Gwinnett residents currently live in the LCI study area.

Transition

- Gwinnett County in general, and the LCI study area in particular, have seen a remarkable shift in racial and ethnic composition over the past ten years.
- In 2000, whites accounted for 55% of the study area's population. By 2010, Non-whites accounted for the majority of residents in the study area (65%), with 29% African-Americans, 18% Asians, and 18% other racial groups. In contrast, non-whites represent 46% of the population of Gwinnett County and 42% of the Atlanta region.
- Hispanics and Latinos have a substantial presence in the LCI study area, with 31% of the total population. Compared to 20% of the population of Gwinnett County and 10% of the Atlanta region.
- From 2000 to 2010, the overall population of the study area increased by 10,073. The white population in the area declined by 3,761 people while the non-white population increased by 13,834.

Household Characteristics

- Study area households are less likely to be married couples and more likely to be singles or other non-family households than is typical county-wide.
- Study area residents tend to be well educated and significantly younger, than county-wide residents.

Housing and Income

- Household incomes in the study area tend to be lower than county and regional averages, with a median household income of $53,084 compared to $64,304 for Gwinnett County and $60,647 for the metro region. This is most likely attributable to the prevalence of smaller, younger households in the study area, particularly in the Gwinnett Place Core.
- The Gwinnett Place area has more lower-income households, while the Sugarloaf area has more upper- income households.
- In the study area, 53% percent of homes are owner-occupied, compared to 73% county-wide and 69% region-wide.

- Multi-family housing accounts for 44% of all units in the study area, a significantly higher share than the 20% county-wide.
- Home values are more modest in the LCI study area than in Gwinnett County as a whole.

Employment

- The LCI study area contains the largest concentration of employment in Gwinnett County. It is home to 3,399 firms employing over 50,000 people.
- The study area economy is highly diversified, with significant numbers of firms and employees in a wide range of employment sectors.
- The study area is a major regional job center, with a jobs-to-housing ratio of 1.6 jobs per housing unit.

B. Residential Real Estate

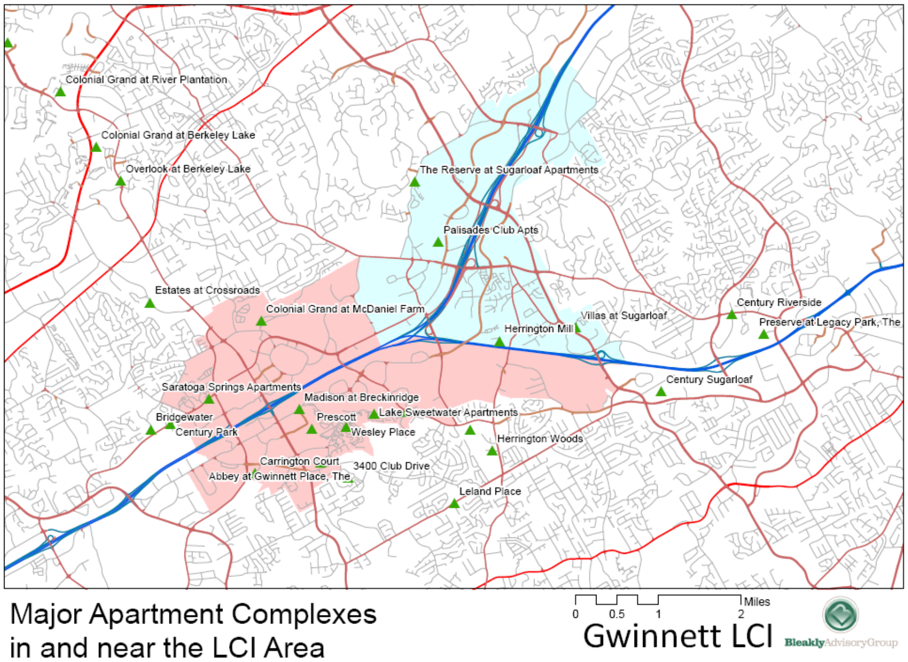
Home Sales

- New home sales volumes and prices have declined significantly in Gwinnett County due to the lingering effects of the Great Recession.
- Townhomes represented 24% of Gwinnett's new home market in 2006, and that share has since declined to 16%, with only 204 new townhomes sold in 2010, a decline of 89% since 2006.
- As in the County, home sales volumes and prices in the study area have declined significantly since the market peak in 2007.
- Median home prices peaked in 2007, at $196,000, and have since declined to $137,000, a decrease of 30% in three years.
- Gwinnett County currently has an estimated 7,488 homes in foreclosure, or 2.6% of its total housing inventory. This rate is comparable to other counties in the Atlanta metro region but higher than the statewide average of 1.9% or the national average of 1.2%. The study area has a reported 2,463 homes, or 2.7%, currently in foreclosure.

Apartments

- The LCI study area's apartments are a substantial component of the housing inventory. The study area contains 13,994 multi-family housing units, most in structures of 5 or more units.
- Rents in Gwinnett are generally lower than the broader Atlanta rental market.
- The median vacancy rate 7.8% in the North Gwinnett submarket, and 6.2 % in the South Gwinnett submarket compared to an average of 8.7% for the Atlanta Region. Average vacancy rates in both the Atlanta region and both Gwinnett submarkets have declined between 2.5 to 3 percentage points over the past 12 months, reflecting a strong rental market.

Figure 3.2: Major Apartment Complexes in and Near the LCI Area



Source: BAG.

C. Commercial Real Estate

- The LCI area contains over 33 million SF of commercial real estate in 664 buildings, Including:
  - 10.2 million SF of retail space, currently 6.7% vacant,
  - 18.8 million SF of industrial space, currently 13.6% vacant.
  - 7.0 million SF of office space, currently 15.3% vacant

Retail

- The study area is a super-regional retail center with over 10 million SF of retail space, with 7.7 million SF in the Gwinnett Place area and 2.5 million SF in the Sugarloaf area.
- The study area contains two super-regional malls: Gwinnett Place Mall and Discover Mills, with a combined 2.5 million SF of space.
- It contains many national discount retailers, including Target, Wal-Mart, Best Buy, Fry's and the region's only Bass Pro Shop.
- It has 24 shopping centers of 50,000 SF or more, representing a total of 4.8 million SF.
- It is home to a growing retail industry serving the area's growing Asian and Latino populations, with malls such as the Santa Fe Mall and Mega Mart, as well as numerous stores and restaurants.
- In 2011 retail outlets in the study area generated $2.4 billion in annually retail sales.

- Retail demand from households in the study area is estimated to be $1.1 billion annually.
- The retail sales generated in the study area has a major impact on sales tax revenues—the $2.4 billion in annual retail sales generates approximately $135 million in sales tax revenue for the State, Gwinnett County and the Gwinnett County Schools.

Industrial

- The study area contains a major concentration of industrial development with 15.7 million SF of industrial space, divided evenly between the two tiers.
- The industrial vacancy is estimated to be 13.5 %, with 2.1 million SF of available space.
- The study area has 62 buildings over 100,000 SF, with 28 in the Gwinnett Place area and 34 in the Sugarloaf area.

Office

- The study area has a substantial inventory of office space.
- There is approximately 7 million SF of space in the study area in 182 buildings.
- There are 28 Class A buildings, with 3.5 million SF of space
    - 2.5 million SF of office space is in the Gwinnett Place area , averaging an 81% occupancy;
    - 1 million of office space SF is in the Sugarloaf area, averaging a 75% occupancy rate.
- There are 81 Class B buildings, with 3.1 million SF of office space in the study area, averaging 83% vacancy in the Gwinnett Place Core and 92% in the sugarloaf core.
- There are 32 Class C buildings, with 560,000 SF of space, with a reported occupancy of 96%.
- The study area has 1.1 million SF vacant office space.
- Roughly one-in-ten Gwinnett residents currently live in the LCI study area.

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4. Land Use

A. Comparison of the LCI Future Land Use Plan with the County Future Land Use Plan

It would be difficult to make precise comparisons between the land use recommendations of the 2001 *Connect Gwinnett* LCI study and the current Future Development Map adopted in the new Gwinnett 2030 Unified Plan. Since that time, the standards for the practice of land use planning have changed. The new Future Development Map for Gwinnett County is not a parcel specific map, which was the typical mapping practice in 2001. Instead, it relies on broad definitions of land use called "character areas" that are drawn more-or-less at the neighborhood scale. Nonetheless, it is useful to consider how the new Future Development Map reflects the general land use recommendations of the 2001 *Connect Gwinnett* LCI study.

Land Use Recommendations of the Original Gwinnett LCI Study

The original Gwinnett LCI study conducted in 2001 reported on the adopted Future Land Use Plan for the study area but did not recommend detailed changes to that pattern. Instead, the plan included a future land use plan that split the study area into different character areas, or "pods." **Figure 4.1** illustrates the 2001 Gwinnett LCI Recommended Future Land Use plan and reflects the idea that the study area should develop with multiple activity centers, each with its own character.

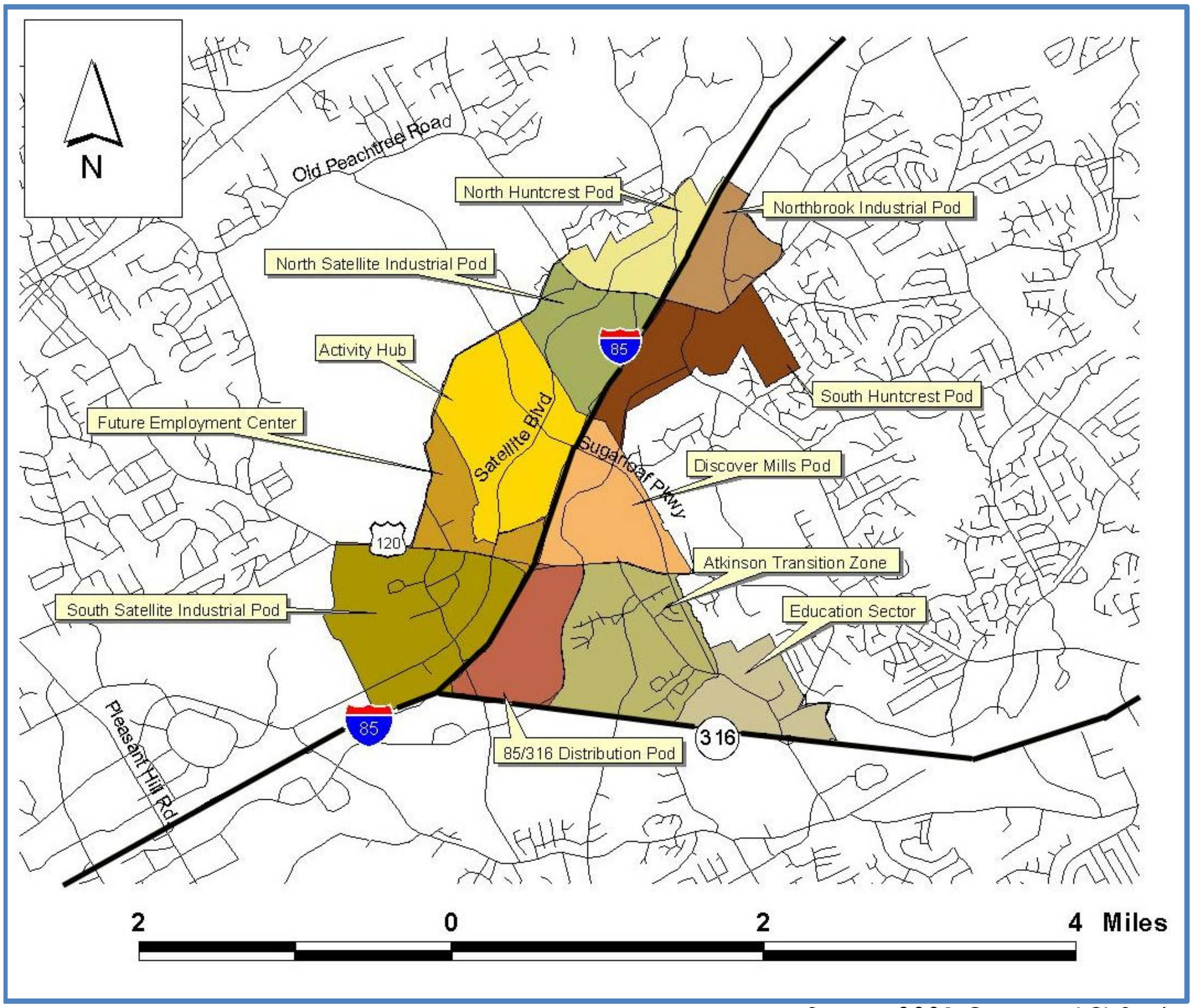
The recommendations contained in the 2001 Future Land Use Plan focused solely on what was then the primary study area (the Sugarloaf Parkway area) and included a set of recommended future land use policies. These policies focused on improving transportation mobility and reducing auto-dependence. Below is a brief synopsis of how these policy recommendations were described in the original LCI Study.

Gwinnett County should amend its Comprehensive Plan by adding a policy encouraging development patterns that include a balance of jobs and appropriate housing with a variety of well-planned land uses that provide the complete functions needed for daily living within a compact area accessible by a variety of transportation modes:

- *Housing*
- *Employment*
- *Retail and commercial services*
- *Entertainment*
- *Public services and amenities*
- *Open space and recreation*
- *Interconnected system of streets, sidewalks, bicycle paths, and transit*

Within the study area, most of the 'pods' are employment centers and commercial areas that would need to be retrofitted to include more housing. Likewise, new development would be encouraged to infill with complementary uses rather than continuing to concentrate the same uses. Doing this could be a fundamental first step towards reducing the length, and number of automobile trips needed during the course of a routine day's activity.

Figure 4.1: Gwinnett LCI (2001) Recommended Future Land Use (Pod Map)



Source: 2001 Gwinnett LCI Study.

The 2001 Gwinnett LCI also recommended the creation of a zoning overlay district for the "Activity Hub" portion of the study area around the Gwinnett Cultural and Arts Center. Recommended provisions of this overlay included:

- allowing a compatible mix of uses,
- flexible setbacks and buffers,
- urban parking options,
- standards and incentives for transit oriented development ,
- standards and incentives for travel demand management,
- the provisions of transit, bike and pedestrian amenities,
- flexible landscape standards that encourage open space conservation, and
- limitations on impervious surfaces.

A Civic Center Overlay was adopted since the completion of the original LCI and was incorporated into Section 1315 "Activity Center/Corridor Overlay District Requirements" of the Gwinnett County

Zoning Resolution. This overlay does not include all of the recommended provisions outlined in the LCI study, but it is a noteworthy milestone nonetheless. The Civic Center overlay is designed to address aesthetic issues, such as signage, street lighting, sidewalks, and landscape requirements. However, it does not address the introduction of mixed use. As shown on the Zoning Map depicted in **Figure 4.4**, the overlay only applies to Tier 2 of the study area.

Most recently, the Gwinnett Center CID proposed new zoning regulations for the CID portions of the study area. These regulations are currently part of an ongoing effort by the County to revise the current Zoning Resolution and incorporate it into an overall Unified Development Ordinance. This effort should be completed in 2012.

Adopted Future Development Map

Since the completion of the original Gwinnett LCI, the County has adopted a new Comprehensive Plan as part of the Unified Plan. Like the original LCI, the Gwinnett 2030 Unified Plan did not include a traditional parcel-based Future Land Use Plan Map, but rather a Future Development Map that divided the county into character areas. See **Figure 4-2** below. **Table 4.1** below outlines the total and relative land areas occupied by each character area within the study area.

According to the 2030 Unified Plan, the predominate character area for the study area is regional mixed-use. This character area includes the most intensive land uses envisioned for Gwinnett County. At build-out, Regional Mixed-Use Centers will resemble high density districts of major metropolitan cities such as Atlanta's Atlantic Station. Buildings will have a mix of uses and higher density to enhance pedestrian activity. (Unified Plan, p. 185)

A second character area in the study area is Mixed Housing Types. This character area encourages a blending of a variety of housing types, including apartments,

Table 4.1: Gwinnett Future Development Map, Area Calculations

Character Area	Acres in Tier 1	Percentage of Total Area in Tier 1	Acres in Tier 2	Percentage of Total Area in Tier 2	Total Acres	Percentage of Total Area
Regional Mixed-Use	1,927.0	41.0%	1,767.1	46.8%	3,694.1	43.6%
Mixed Housing Types	1,575.9	33.6%	100.0	2.6%	1,675.9	19.8%
Preferred Office	764.3	16.3%	1,121.6	29.7%	1,885.9	22.3%
R & D Corridors	368.7	7.9%	195.1	5.2%	563.7	6.7%
Existing/Emerging-Suburban	59.5	1.3%	592.9	15.7%	652.4	7.7%
Total	**4,695.4**	**100.0%**	**3,776.7**	**100.0%**	**8,473.1**	**100.0%**

Source: Jacobs, September 2011

townhomes, and single-family detached housing, which currently make up the vast majority of the county housing stock. The Unified Plan recommends that single-family detached houses only make up 30% or less this housing stock.

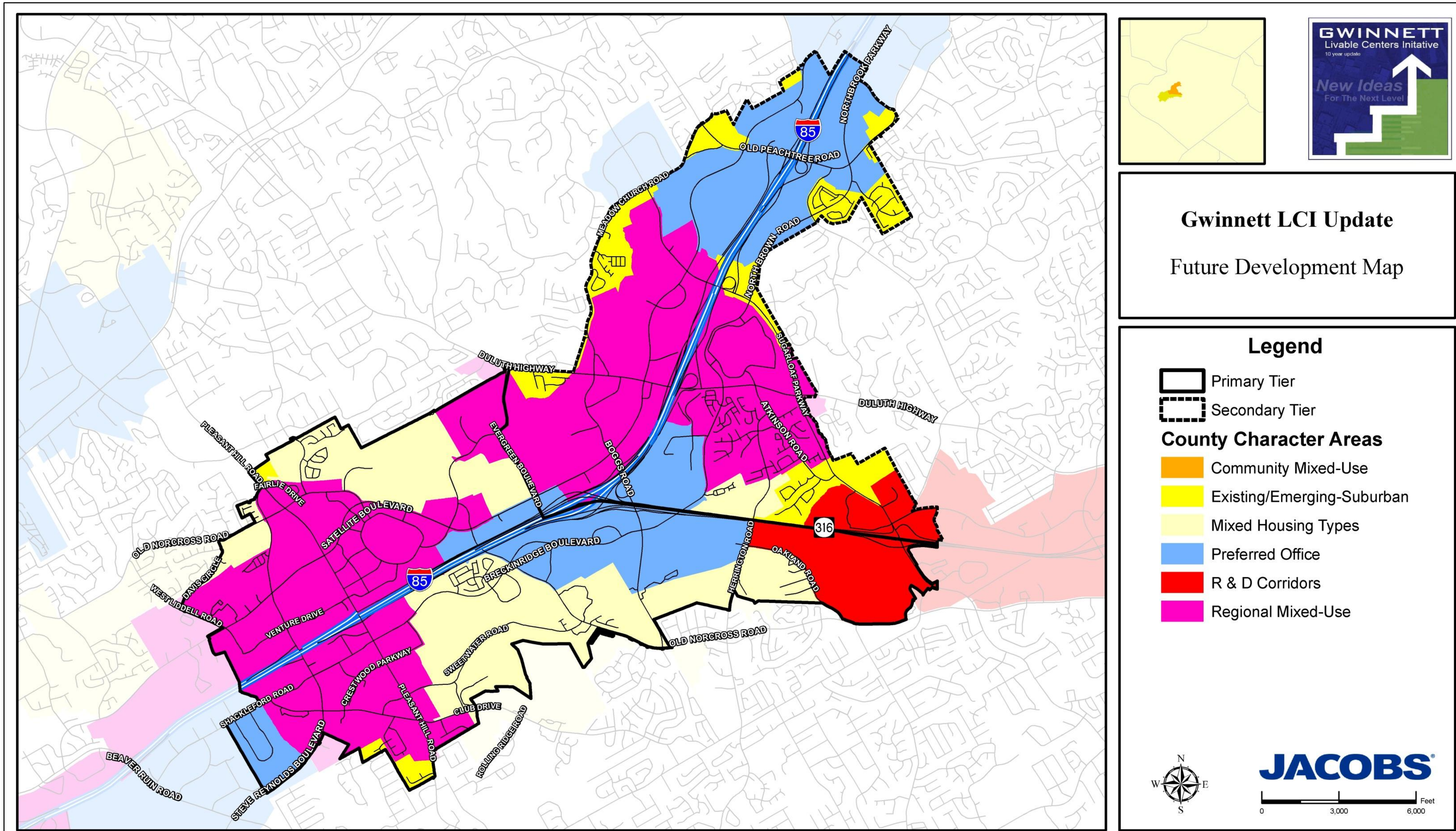
The promotion of professional office development was identified as a primary goal of the Unified Plan; therefore, the Preferred Office character areas are intended to preserve key sites for such uses and also promote the redevelopment of light industrial and commercial areas into high quality office uses.

Like the Preferred Office character area, the R&D (Research and Development) Corridor is intended to promote the preservation and redevelopment of key areas for economic development. As it develops, the R&D Corridor will encourage the development of the County's employment sector and contribute to the County's future economic success.

The remainder of the study area is designated as Existing or Emerging Suburban. This character area is viewed as the prime location for single-family detached housing and supporting commercial, service and public/institutional uses.

A variety of uses currently makes up the LCI study area, although the mixture of uses typically does not occur in one building.

Figure 4.2: Future Development Map (2008)



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B. Existing Land Use

Figure 4.3 illustrates the existing land use patterns within the study area. **Table 4.2** demonstrates that the commercial/retail uses occupy the largest percentage of the land area, at around 17%. In all, the employment based uses, such as industrial and office, occupy over 40% of the total study area. Less than 10% of the study area is undeveloped.

Table 4.2: Existing Land Use, Gwinnett LCI Study Area

Existing Land Use	Acres in Tier 1	Percentage of Total Area in Tier 1	Acres in Tier 2	Percentage of Total Area in Tier 2	Total Acres	Percentage of Total Area
Commercial/ Retail	988.5	21%	445.2	12%	1,433.6	17%
Office/ Professional	587.9	12%	227.9	6%	815.9	10%
Light Industrial	555.1	12%	573.9	15%	1,129.0	13%
Heavy Industrial	9.9	<1%	52.2	1%	62.1	1%
Mixed Use	25.9	1%	17.5	<1%	43.4	1%
Total Commercial/ Industrial	**2,167.3**	**46%**	**1,316.7**	**35%**	**3,484.0**	**41%**
Estate Residential	15.8	<1%	29.6	1%	45.4	1%
Low Density Residential	43.2	1%	91.8	2%	135.0	2%
Medium Density Residential	75.6	2%	145.4	4%	221.0	3%
High Density Residential	24.7	1%	17.6	<1%	42.3	<1%
Multi-family Residential	900.6	19%	265.3	7%	1,165.8	14%
Total Residential	**1,059.9**	**23%**	**549.7**	**15%**	**1,609.5**	**19%**
Institutional/ Public	256.2	5%	439.8	12%	696.1	8%
Public Park	133.4	3%	0.0	0%	133.4	2%
Park/Recreation/ Conservation	98.4	2%	114.9	3%	213.3	3%
Rights-of-way	642.8	14%	817.7	22%	1,460.5	17%
Transportation/ Communication/ Utilities	68.0	1%	27.8	1%	95.8	1%
Total Supportive Infrastructure	**1,198.8**	**25%**	**1,400.2**	**37%**	**2,599.1**	**31%**
Undeveloped	267.7	6%	468.0	12%	735.7	9%
Agricultural	0.0	0%	26.7	1%	26.7	<1%
Water	14.1	<1%	7.1	<1%	21.2	<1%
Total Other	**281.8**	**6%**	**501.8**	**13%**	**783.6**	**9%**
Total	**4,708.0**	**100%**	**3,768.3**	**100%**	**8,476.3**	**100%**

Source: Jacobs, September 2011

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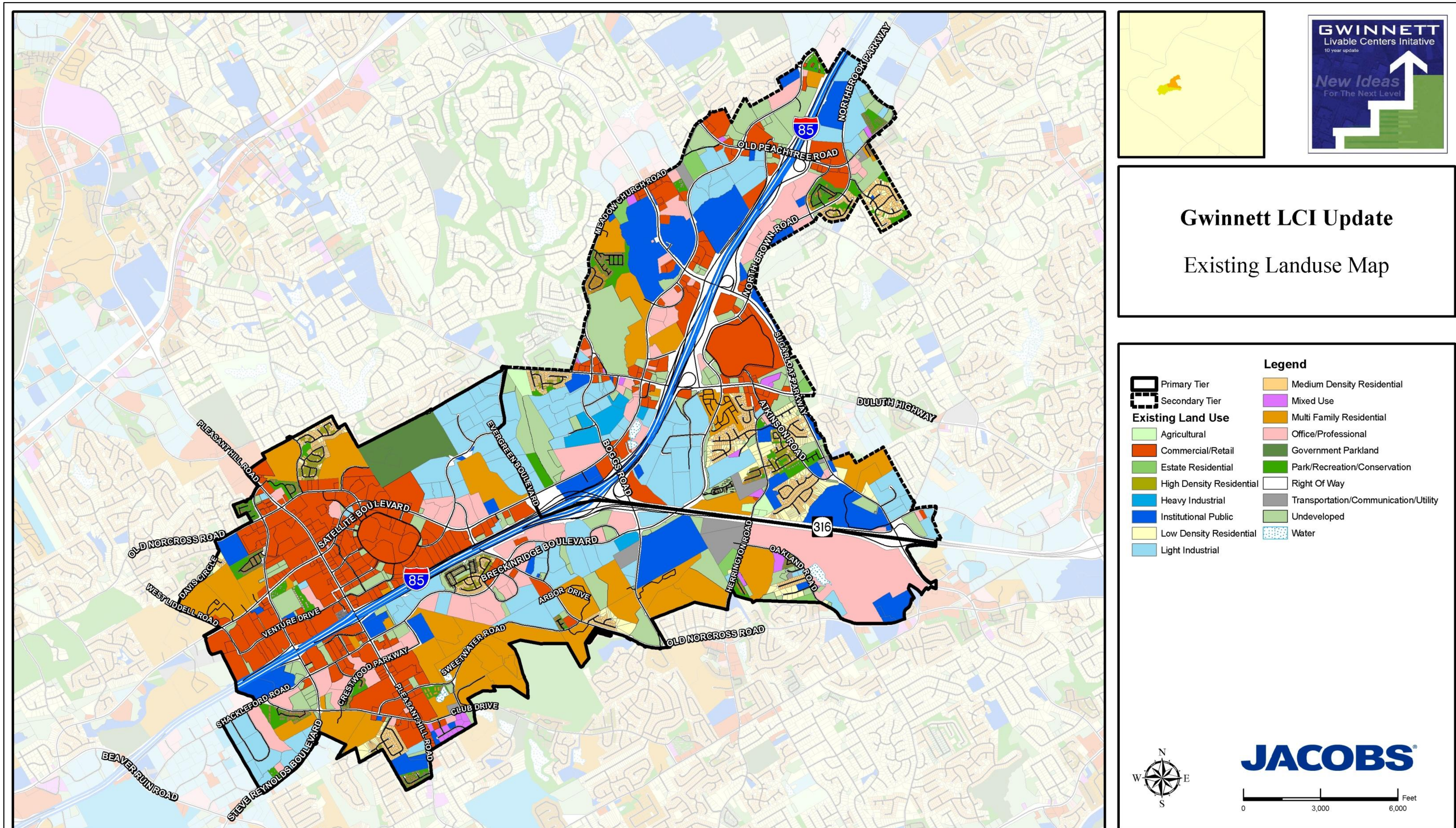
Figure 4.3: Existing Land Use Map (2011)



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C. Zoning

Zoning within the study area primarily supports commercial and industrial activity. As shown in **Table 4.3**, 70% of the total study area is zoned for such activity. Of this total, only a small portion—approximately 100 acres—is currently zoned for mixed-use.

As illustrated in **Figure 4.4**, multi-family residential zoning accounts for most land area that is not zoned for commercial or industrial use. And while single-family residential zoning is the predominant category for the County as a whole, it accounts for less than 10% of the land in the study area. Only 1% of the study is zoned for agricultural uses.

Since the adoption of the original LCI in 2001, zoning in the study area has not significantly changed. A Civic Center Overlay District now regulates aesthetics and some transportation elements of the area around the Civic Center (located within Tier 2).

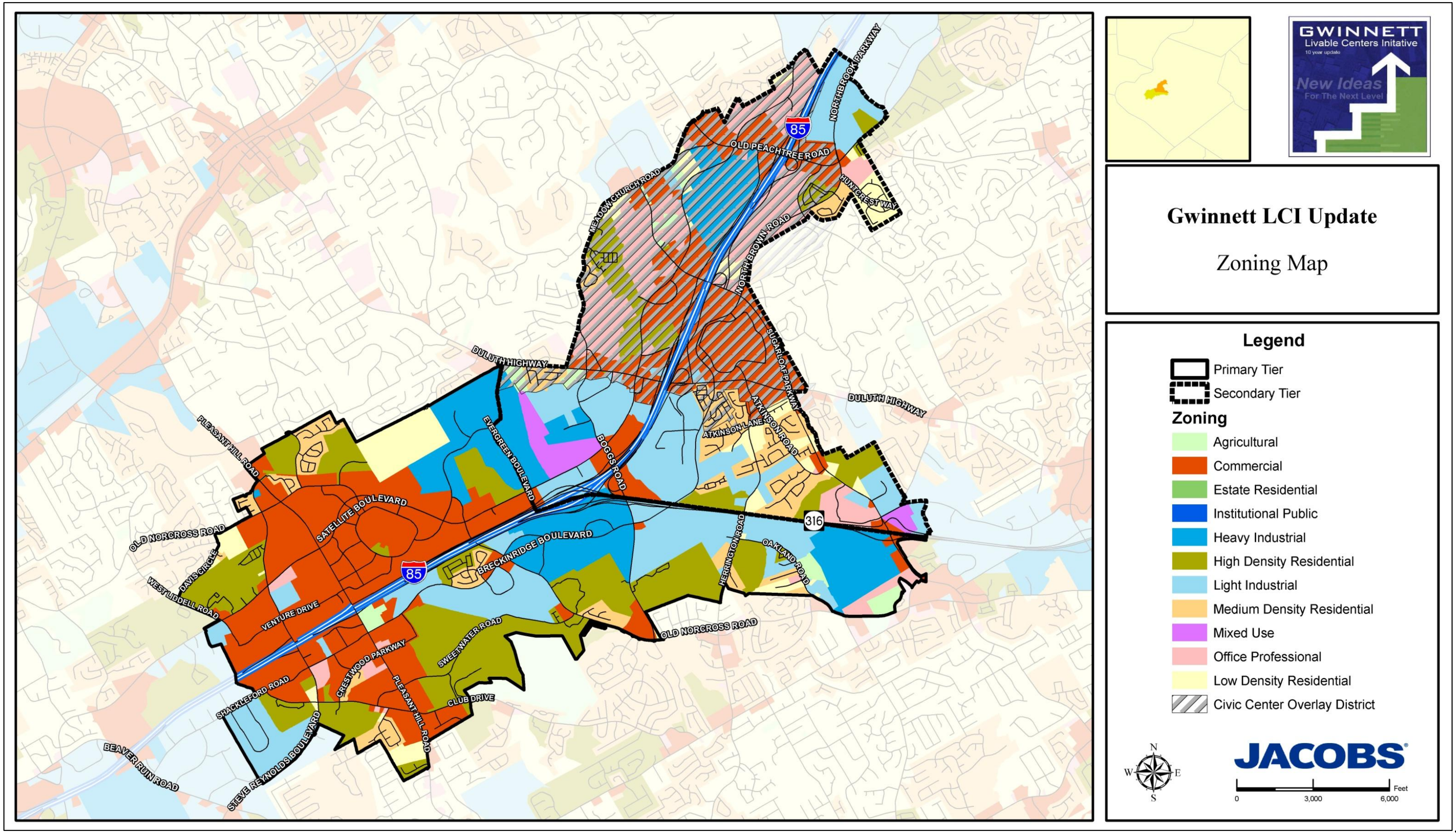
Additionally, a new High-Rise Residential (HRR) District was adopted and some limited areas (10.5 acres) within Tier 1 were rezoned for this use. The HRR District can only be applied in areas designated as Major Activity Centers in the County Comprehensive Plan. Major Activity Centers are tracts of land located adjacent to, or having immediate access to, major thoroughfares and infrastructure able to support intensive land uses. (Section 1303. RM Multi-family Residence District, *Gwinnett County Zoning Resolution*.)

Additionally, there is no maximum project density within the HRR district, although building heights cannot exceed 25 stories or 300 feet without a Special Use Permit. Up to 40% of the gross square footage of a high-rise structure (exclusive of parking) may be occupied by accessory office, retail, and service uses.

Table 4.3: Zoning within the Gwinnett LCI Study Area

Zoning	Acres in Tier 1	Percentage of Total Area in Tier 1	Acres in Tier 2	Percentage of Total Area in Tier 2	Total Acres	Percentage of Total Area
C1	10.6	<1%	0.9	<1%	11.6	<1%
C2	1,095.7	23%	985.9	26%	2,081.7	25%
C3	485.7	10%	14.4	0%	500.1	6%
OI	79.7	2%	628.1	17%	707.8	8%
M1	726.2	15%	759.3	20%	1,485.4	18%
M2	703.0	15%	344.1	9%	1,047.2	12%
MUO	0.0	0%	20.9	1%	20.9	<1%
MUR	0.0	0%	87.2	2%	87.2	1%
PUD	0.1	<1%	0.0	0%	0.1	<1%
Total Commercial/ Industrial Zoned Areas	**3,101.0**	**66%**	**2,840.8**	**75%**	**5,942.0**	**70%**
R140	16.4	<1%	0.0	0%	16.4	<1%
R100	3.3	<1%	164.0	4%	167.3	2%
R100CSO	0.1	<1%	1.4	<1%	1.6	<1%
R75	192.4	4%	55.5	1%	247.9	3%
R75CLU	0.0	0%	1.1	<1%	1.1	<1%
R75MOD	0.0	0%	1.0	<1%	1.0	<1%
R60	10.7	<1%	68.8	2%	79.5	1%
RTH	58.3	1%	2.0	<1%	60.3	1%
RZT	131.7	3%	199.6	5%	331.3	4%
RM	246.0	5%	19.6	1%	265.5	3%
RM6	8.3	<1%	0.0	0%	8.3	<1%
RM8	27.3	1%	35.4	1%	62.8	1%
RM10	234.5	5%	27.4	1%	262.0	3%
RM13	605.5	13%	259.9	7%	865.4	10%
HRR	10.5	<1%	0.0	0%	10.5	<1%
MH	0.0	0%	43.7	1%	43.7	1%
Total Residential Zoned Areas	**1,545.1**	**33%**	**879.5**	**24%**	**2,424.4**	**29%**
RA200 (Agriculture)	**61.9**	**1%**	**48.0**	**1%**	**109.9**	**1%**
Total	**4,708.0**	**100%**	**3,768.3**	**100%**	**8,476.3**	**100%**

Figure 4.4: Zoning Map (2011)



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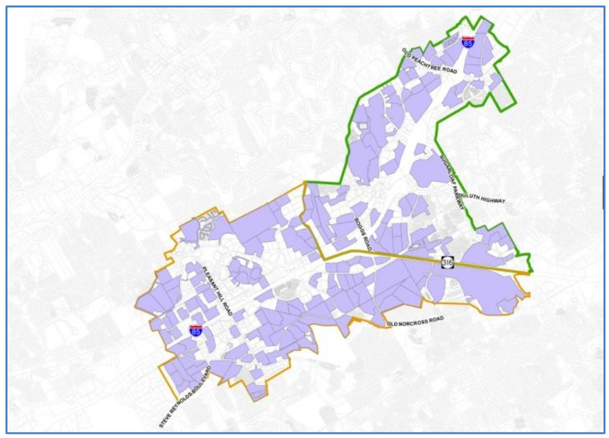
D. Development Opportunities

Parcels offering the best opportunities for redevelopment were identified by analyzing several different factors: large parcels, government owned properties, shopping centers with high vacancy rates, and undeveloped areas. Following is an explanation of the opportunities these parcels offer potential developers, as well maps illustrating the locations of these parcels within the study area.

Large Parcels

Large parcels, over 10 acres in size, have the potential to be redeveloped due to size alone. Little land assembly would be necessary to create a single feasible project. As illustrated by **Figure 4.5**, a majority of the study is comprised of parcels over 100 acres in size.

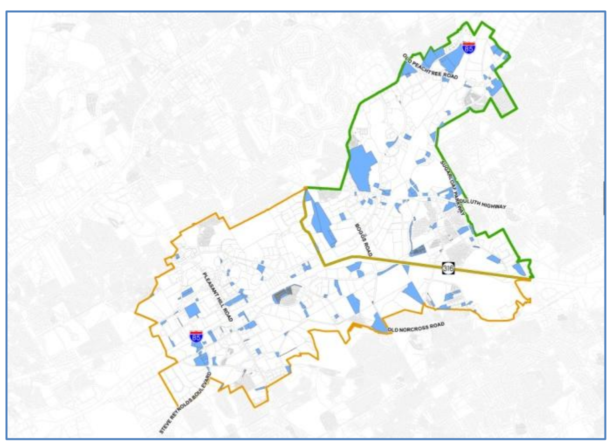
Figure 4.5: Large Parcels Map



Undeveloped Parcels

Construction on undeveloped parcels is almost always easier and less expensive than redevelopment. In older portions of the study area, such as the Gwinnett Place vicinity, undeveloped areas are likely to contain floodplains, utility easements, or poor road access. However, even if these undeveloped parcels are not suitable for retail or residential construction, they may still offer opportunities for open space and green connections

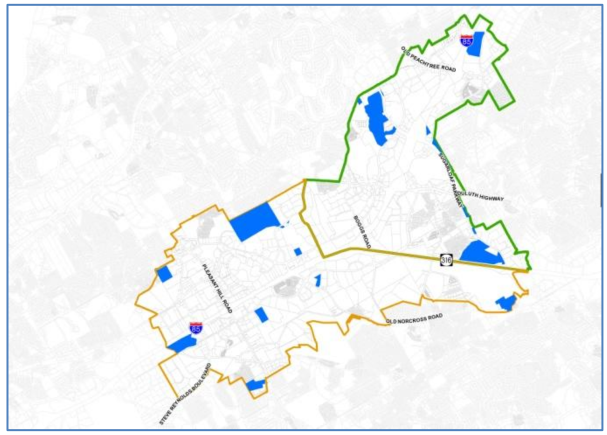
Figure 4.6: Undeveloped Parcels Map



Government Owned Parcels

Government-owned property primarily attract development by providing amenities such as recreation and open space t hat a developer might other-wise feel compelled to provide on their own site to attract buyers. Also government-owned property can more easily be leveraged to encourage private reinvestment than private owned property. The county in consultation with CID should access what properties, if any can be put “in play”.

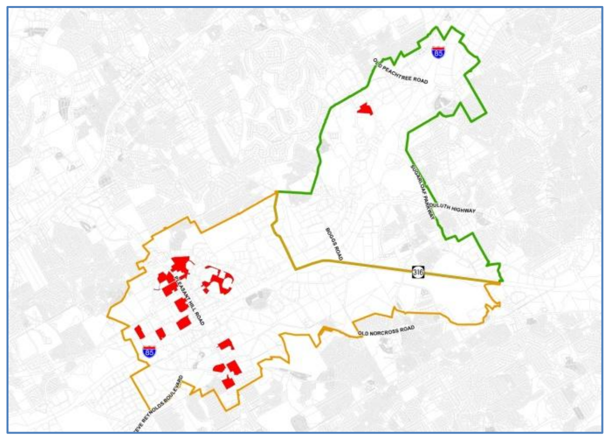
Figure 4.7: Government-owned Parcels



Aging Shopping Centers

With Gwinnett Place Mall being constructed in 1984, the area surrounding the old mall includes a number of aging strip shopping centers that offer an excellent opportunity for redevelopment. Even if the shopping centers themselves are not renovated or redeveloped, the large areas of pavement surrounding or in front of these centers offers available excellent space for new construction. Flat located in areas already developed, they are easy to build upon, and can help increase the density in targeted areas.

Figure 4.8: Aging Shopping Centers



Development Opportunities Map

The Development Opportunities Map depicted in Figure 4.9 combines factors to rate specific parcels by their potential for redevelopment. This map illustrates potential 'go zones' that are most likely to change and identifies possible catalyst sites where redevelopment incentives should be focused. The rating scale is as follows:

Excellent Current Opportunity – Dark green parcels are vacant or underutilized, are in a good location, or have owners who are actively seeking to redevelop.

Good Opportunity – Yellow parcels do not have all the desirable attributes for redevelopment, but might benefit from nearby activity, or a favorable location.

Extended Opportunity - In most cases, these orange parcels are less likely to be redeveloped and would require assemblage or incentives to do so.

Static Parcels – The red parcels are highly unlikely to redevelop in the near or foreseeable future, due active usage that is unlikely to relocate.

Undevelopable Parcels – Light green parcels are not developable due to flood plain restraints or power line easements.

The map illustrates that much of the study area offers potential for redevelopment. This is primarily due to the age of the existing development and the relatively large tract sizes, which make land assemblage easy.

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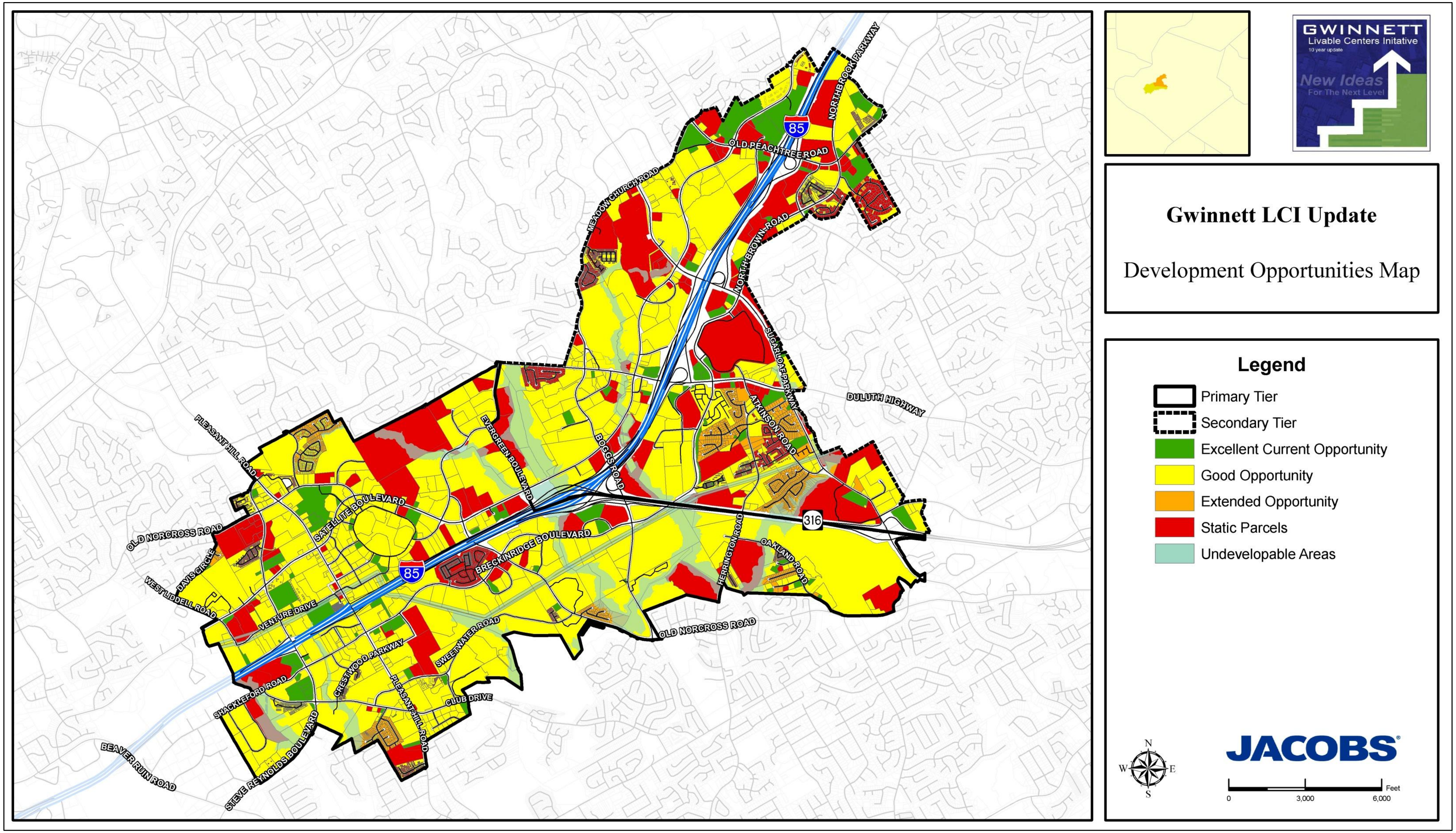
Figure 4.9: Development Opportunities Map



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E. Build Out

The Build Out Land Use Map, **Figure 4.10**, presents a visualization of the study area under current development trends and regulations. It combines information from the Existing Land Use and Zoning maps for the area. Parcels that are currently undeveloped, or used for agricultural or estate residential purposes are shown on the map as their current zoning classification would allow. For example, if a parcel's current use is Estate Residential or Agricultural but it is zoned C-2, it is shown as Commercial/Retail. The remaining parcels are shown as they are currently developed or as they are shown on the Existing Land Use Map. Of the undeveloped land, 58% percent is zoned commercial, office or mixed-use; 23% is zoned residential; and 19% is zoned industrial.

As is illustrated by the map, the zoning and existing land uses in the area are closely matched under current county development policy. The major difference is one of intensity or density.

The current county zoning code does not regulate commercial density directly, so potential build-out of a parcel is regulated by building height, parking requirements, and set-back regulations. Gwinnett County recently reduced the minimum parking required for retail and commercial development from one space per 200 square feet of building area to one space per 500 square feet. Under the current parking regulations, most of the commercial and office sites could legally accommodate almost three times the square footage of development than is currently built in the C-2 and C-3 zoning districts.

Jobs/Housing Balance

The current jobs-housing balance for the study area is weighted towards jobs, as **Table 4.4** shows. This due in part because the majority of the study area is industrial or commercial in character, but also because the existing suburban land form separates commercial and industrial land uses from residential. This might improve with redevelopment to higher density multi-family or more mixed-use development, but very little of the area is currently zoned to allow these uses. Without rezoning, the jobs/housing ratio is more likely to rise as a result of new development.

Table 4.4: Jobs/Housing Balance, 2010

	Gwinnett Place Core (Tier 1)	Sugarloaf Core (Tier 2)	LCI Market Area	Gwinnett County
Population	7,719	14,368	81,348	815,342
Housing Units	3,523	5,434	31,728	287,401
Jobs	14,796	15,311	50,373	288,900
Jobs/Housing Ratio	4.20	2.82	1.59	1.01

Source: Bleakly Advisory Group, 2011.

In 2001, the overall jobs/housing ratio within the study area was 3.97 with a ratio of 4.20 for the Gwinnett Place Core (Tier 1) and 2.82 for the Sugarloaf Core (Tier 2). This indicates that the ratio has changed little in the past 10 years. In the future, if our current buildout model holds true, that ratio is likely to increase. More housing and mixed use is needed in the area to balance the ratios.

Transit Compatibility

Currently, the average residential and employment density in the study area supports bus transit but is not at the level needed to support fixed-rail transit. However, under the Build Out Scenario, the potential for greater commercial and office density, exceeding 30,000 sq. ft./acre, could be "transit-supportive" if the jobs/housing balance were also improved.

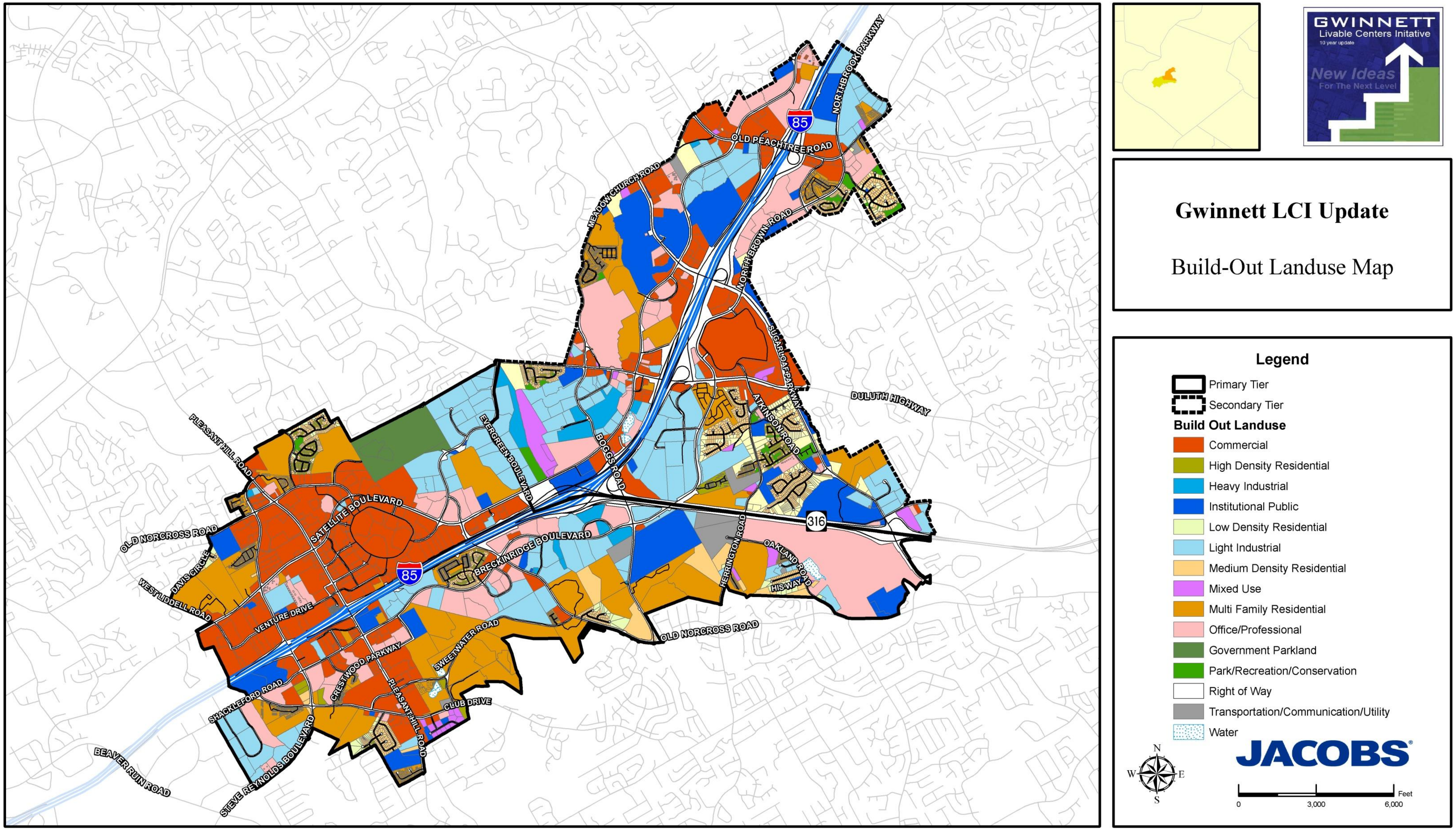
The location and design of future density will be critical to the success of transit-oriented development (TOD). To support fixed-guideway transit, the transit supportive density should be concentrated within walking distance of stations (1,500 ft. radius). Additionally, to be transit supportive, the study area would require re-distribution of the total building square footage in order to establish 5-10 story buildings with a floor area ratio (FAR) greater than 2.0 and residential density of 60-100 units/acre in areas near transit stations. This density would decrease incrementally, down to 1-3 stories at the perimeter, in order to maintain compatibility with the 1-story residential and commercial edges that surround the transit station areas.

or example, when MARTA evaluated the introduction of fixed-rail transit in this area, the study recommended a typical station development profile similar to the TOD prototypical station area plan developed for the NorthPoint Mall Station area of North Fulton. The build out in this area was:

- 4,914 residential units
- 55,000 sq. ft. of local services/convenience retail and restaurants
- 1,088,000 sq ft of office space
- 110,000 sq ft. hotel

The study stressed that, in addition to density, the mixture of land uses around proposed rail stations is also critical to reduce auto-dependence.

.Figure 4.10: Build Out Map (2011)



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F. Lifelong Communities Assessment

The goal of Lifelong Communities is to create communities that accommodate the needs of residents throughout all stages of life. In support of a Lifelong Community, for example, zoning policy should be adopted to facilitate the development of housing for older adults. Such policy might include accessory dwelling units, easy living and visitability standards in new construction, and energy efficiency standards for new construction and home renovations.

The design of a Lifelong Community may also include:

- Senior centers/communities on transit routes
- Develop walkable communities
- Improve design of sidewalk infrastructure to meet older adults needs – curb cuts, wide sidewalks (to accommodate mobility aids) with traffic buffers and shade, countdown crosswalk signals
- Increase neighborhood access to fresh fruit and vegetables
- Accessible recreation options – parks, city facilities
- Expand volunteer opportunities for older adults
- Enhance the design of healthcare facilities to meet the needs of older adults – parking, lighting, waiting areas, drop off areas, etc.

Figure 4.11 is based on data received from the ARC and reflects the location of local personal care homes, nursing facilities, health centers, and access to fixed route transit. As the map illustrates, there are a few senior living facilities in the study area, although the majority of these facilities are concentrated to the south towards Lilburn. Standard local transit service now serves the local shopping and employment needs of younger persons in the community, but does not adequately serve the needs of the elderly. To accommodate the aging population, special on-call para-transit service is needed countywide.

In 2009, ARC and Duany Plater-Zyberk & Company hosted a nine-day Lifelong Communities (LLC) charrette. Gwinnett Place was the subject of one of the charrettes. The results of the charrette were meant to show how the principles of the Lifelong Communities could be applied; however, the recommendations did not consider real life constraints or account for existing market conditions. Ultimately, the charrette was more of an academic exercise than a practical one. The full report is available on the ARC website: *http://www.atlantaregional.com/aging-resources/lifelong-communities-llc/lifelong-charette-outcomes*

It will be the goal of this study to offer a more practical application of the Lifelong Community principles.

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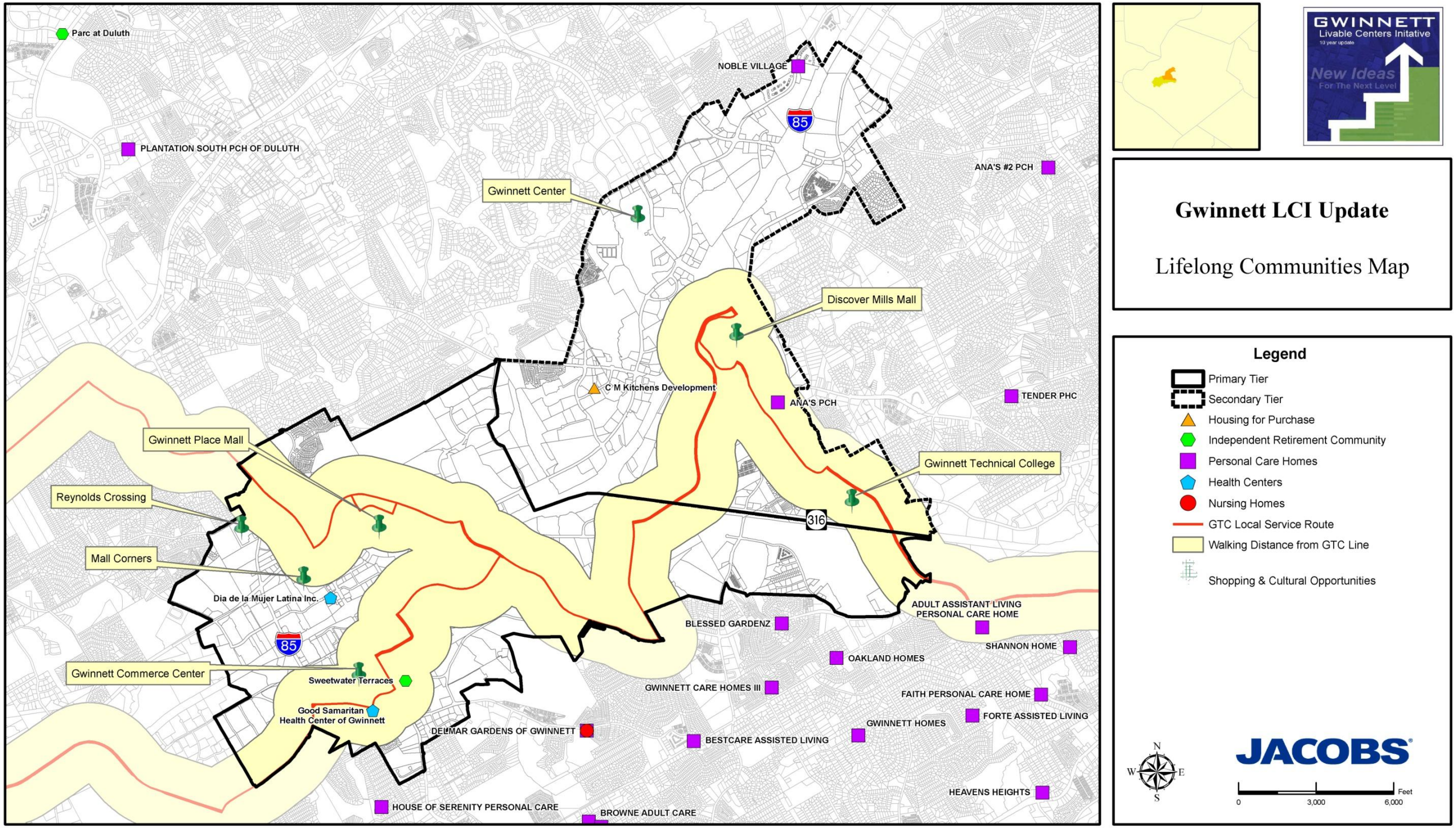
Figure 4.11: Lifelong Communities Map



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5. Transportation

The prominence and growth of the Gwinnett Place area of Gwinnett County can largely be attributed to its location at the crossroads of major north-south and east-west traffic and the high capacity of the existing transportation system. Almost 500,000 motorists pass through the area on a typical weekday. This includes 230,000 vehicles a day using I-85, converging with another 85,000 vehicles per day passing along GA 316. Major arterials with interchanges in the study area include Steve Reynolds Boulevard with about 45,000 vehicles per day, Pleasant Hill Road with about 53,000 vehicles per day, Duluth Highway with 34,000 vehicles per day and Sugarloaf Parkway with about 40,000 vehicles per day.

A. Roadways

As indicated by **Table 5.1**, Historic Traffic Counts, the study area roadways have experienced a decline in average daily traffic (ADT) in the last few years. This decline in ADT is most evident near the Gwinnett Mall area along Satellite Boulevard and is most likely due to the economic recession and associated employment losses.

Even with this recent decline in ADT, the level of service (LOS) of study area roadways is still low in many areas and is projected to further decrease in coming years. In general, roadways providing access to and from I-85 operate at a lower LOS under existing conditions than other study area roadways. The Pleasant Hill Road interchange at I-85 is currently one of the most congested roadway segments in the study area. Short and long-term improvements are planned and are anticipated to greatly improve the traffic flow and safety at this interchange.

Other roadways that also provide access to I-85, such as Duluth Highway, Sugarloaf Parkway, and Old Peachtree Road, were operating at LOS D or below in 2010. These roadways experience their lowest LOS in the immediate vicinity of I-85 and in some areas near SR 316. This indicates that access to and from freeways is one of the more important transportation needs and issues in the study area.

Furthermore, by 2040, I-85 is projected to operate at unacceptable levels through the primary study area and at LOS C in the secondary study area north of SR 316. Likewise, portions of SR 316 near the boundary of the primary and secondary study areas are projected to operate at LOS F by 2040.

For more detail regarding the level of service for study area roads, please see **Table 5.2** and **Figures 5.1** and **5.2**.

Table 5.1 Historic Traffic Counts

	Facility	To	From	2007	2008	2009	2010
Primary Tier	Pleasant Hill Rd	Club Dr	Breckinridge Blvd	46,823	48,614	-	46,807
		Breckinridge Blvd	I-85	62,915	-	55,824	52,983
		I-85	Satellite Blvd	52,100	-	53,331	-
		Satellite Blvd	Old Norcross Rd	43,145	-	-	39,350
	Satellite Blvd	Pleasant Hill Rd	Old Norcross Rd	32,009	-	35,442	33,126
		Old Norcross Rd West	Old Norcross Rd East	54,148	46,279	42,969	41,680
		Old Norcross Rd	Boggs Rd	39,415	-	34,378	31,793
		Boggs Rd	Duluth Hwy	-	21,344	-	22,753
		Duluth Hwy	Sugarloaf Pkwy	-	16,782	-	19,076
		Sugarloaf Pkwy	Old Peachtree Rd	23,326		-	22,491
	Old Norcross Rd	Pleasant Hill Rd	Satellite Blvd	27,505	-	-	30,083
		Satellite Blvd	Breckinridge Blvd	-	21,488	-	23,603
		Breckinridge Blvd	Boggs Rd	-	-	33,645	36,750
	Steve Reynolds Blvd	Beaver Ruin Rd	Club Dr	26,336	21,245	24,334	30,387
		Club Dr	I-85	-	42,860	-	39,912
		I-85	Satellite Blvd	-	40,020	-	45,833
		Satellite Blvd	Old Norcross Rd	33,487	-	-	32,293
	Boggs Rd	Duluth Hwy	Satellite Blvd	13,077	13,746	-	12,651
		Satellite Blvd	I-85	26,194	-	-	23,875
		I-85	Breckinridge Blvd	-	23,903	-	24,931
		Breckinridge Blvd	Old Norcross Rd	14,972	15,872	-	17,411
	Shackleford Rd/ Breckinridge Blvd	Steve Reynolds Blvd	Pleasant Hill Rd	17,358	-	14,466	15,750
		Pleasant Hill Rd	Old Norcross Rd	22,206	-	15,733	16,136

	Facility	To	From	2007	2008	2009	2010
		Old Norcross Rd	Boggs Rd	14,475	10,643		11,480
	West Liddell Rd	Old Norcross Rd	Venture Dr	5,901	-	6,496	-
		Venture Dr	Satellite Blvd	7,908	-	8,495	-
	Venture Drive	West Liddell Rd	Steve Reynolds Blvd	-	12,157	-	14,060
		Steve Reynolds Blvd	Pleasant Hill Rd	-	11,267	-	12,929
	Club Drive	Shackleford Rd	Steve Reynolds Blvd	6,572	-	-	7,510
		Steve Reynolds Blvd	Sweetwater Rd	38,344	-	31,969	33,806
		Sweetwater Rd	Pleasant Hill Rd	31,037	-	-	32,171
		Pleasant Hill Rd	Sweetwater Club Dr	23,555	-	23,879	-
Secondary Tier	Duluth Hwy	Satellite Blvd	I-85	32,513	-	33,831	-
		I-85	Sugarloaf Pkwy	38,077	-	-	-
	Sugarloaf Pkwy	Medow Church Rd	Satellite Blvd	41,834	-	-	39,136
		Satellite Blvd	I-85	48,140	45,952	43,253	41,823
		I-85	Duluth Hwy	40,311	-	36,160	40,492
	Old Peachtree Rd	Satellite Blvd	I-85	33,328	37,202	40,683	39,613
	Sweetwater Rd	Club Dr	Pleasant Hill Rd	-	-	5,698	6,423
		Pleasant Hill Rd	Old Norcross Rd	-	-	11,831	13,065
	North Brown Rd	Duluth Hwy	Sugarloaf Pkwy	6,757	7,949	7,711	-
		Sugarloaf Pkwy	Sever Rd	18,153	13,720	13,385	-

Source: Gwinnett County Traffic Engineering and Planning – ADT Major Facilities.

Table 5.2: Existing and Future Level of Service on Major Study Area Roadways

Roadway	Segment	Existing (2010) LOS	Projected 2040 LOS
Primary Tier			
Pleasant Hill Road	Satellite Blvd to Venture Drive	C	D
	Venture Drive to I-85	E/F	E/F
	I-85 to Ronald Reagan Pkwy	D	E/F
Satellite Boulevard	Pleasant Hill Road to Evergreen Blvd	A/B	A/B
Shackleford Road/Breckenridge Boulevard	Club Drive to Pleasant Hill Road	A/B	E/F
	Pleasant Hill Road to Boggs Road	A/B	A/B
Club Drive	Shackleford Road to Pleasant Hill Road	C	E/F
Steve Reynolds Boulevard	Pleasant Hill Road to Shackleford Road	A/B	C
	Shackleford Road to Beaver Ruin Road	C	C/D
Secondary Tier			
Satellite Boulevard	Evergreen Blvd to Wildwood Road	A/B	B/C
Sugar Loaf Parkway	Meadow Church Road to Satellite Blvd	C	D
	Satellite Blvd to North Brown Road	D	E
	North Brown Road to SR 316	C	C
Duluth Highway	Boggs Road/Meadow Church Road to Satellite Blvd	C	D
	Satellite Blvd to I-85	D	E/F
	I-85 to Sugarloaf Pkwy	C	D/E
Old Peachtree Road	Meadow Church Road to Satellite Blvd	A/B	C
	Satellite Blvd to Sever Road NW	C/D	E/F
	Sever Road NW to Dean Road	E/F	E/F

Source: ARC 2010 and 2040 Travel Demand Model Network

Figure 5.1 Existing (2010) Level of Service (LOS) Map

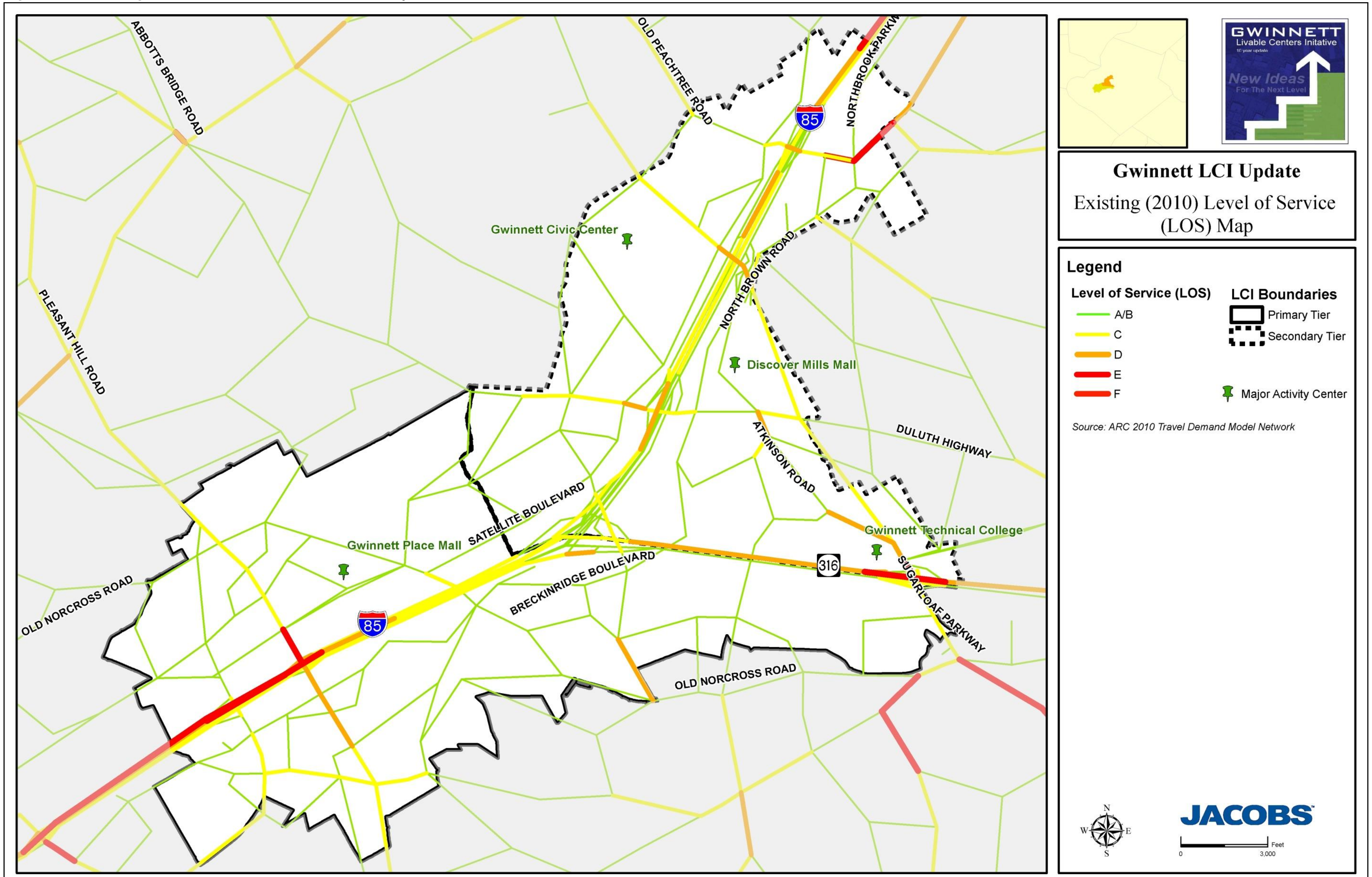

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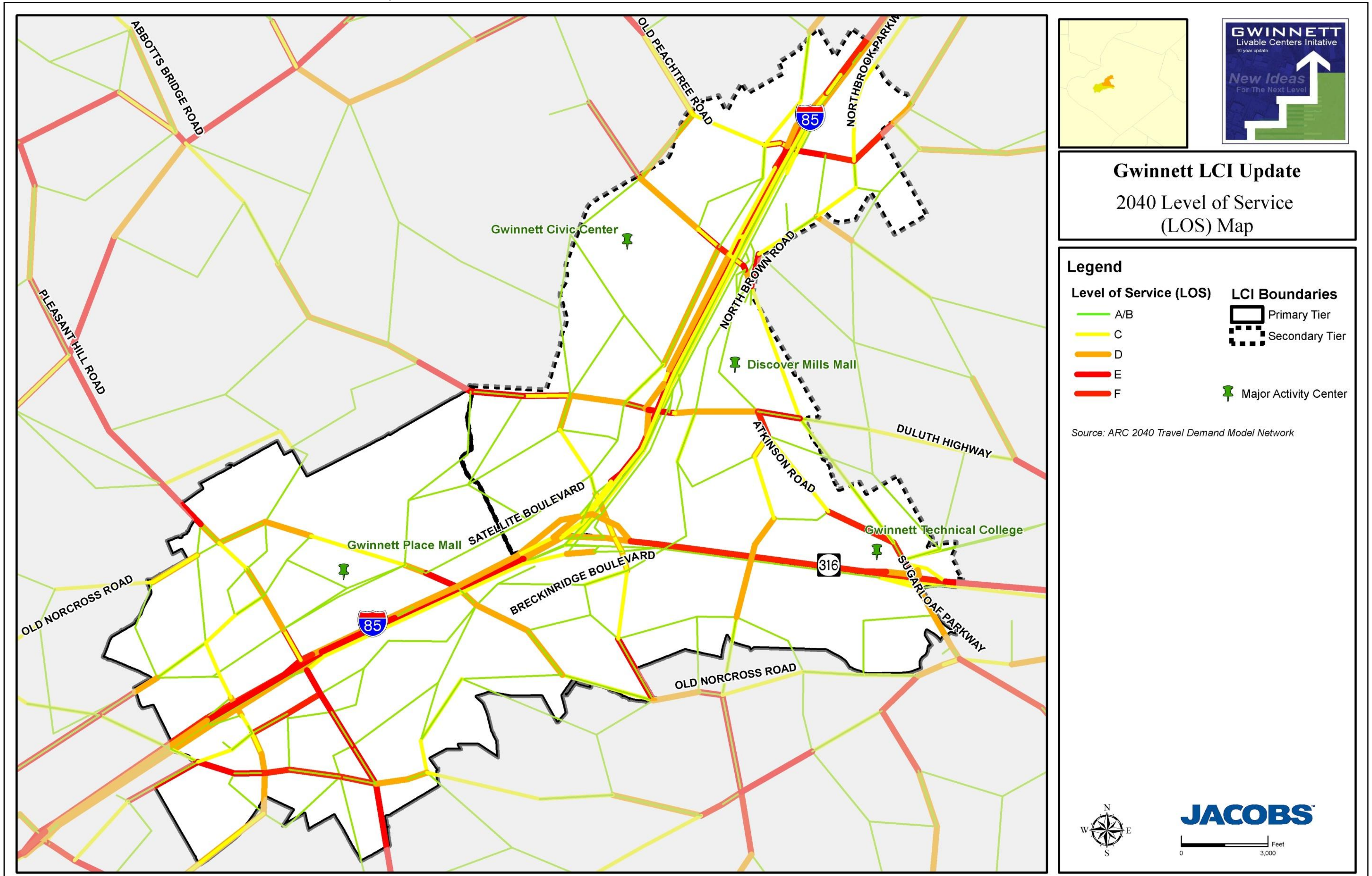
Figure 5.2 Future (2040) Level of Service (LOS) Map



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B. Transit

Existing Service

Existing transit service within the study area includes three circulatory local bus routes and four express commuter routes that originate at study area park-and-ride lots (**Table 5.3**). The local routes are operated by Gwinnett County Transit (GCT) and connect Gwinnett Place and Discover Mills Mall with greater Gwinnett County, the GCT Transit Center, and the MARTA heavy rail system at Doraville Station. Local bus routes also serve the Gwinnett Civic Center vicinity, Gwinnett Technical College, and other major activity centers in the study area.

The express service features limited stops and runs only during prime commuting hours. GCT operates Route 103 with express service from a park and ride lot at Discover Mills Mall to employment centers in central Atlanta. GCT also operates Route 103A, which services the reverse commute for this route. Georgia Regional Transportation Authority (GRTA) operates Routes 410 and 412 with express service from Discover Mills to Lindbergh Center Station in Atlanta (410) and also to Midtown and Downtown Atlanta (412). GRTA does not service reverse commute routes.

Future Service

In conjunction with the Gwinnett Village CID, Gwinnett Place CID completed the I-85 Corridor Light Rail Transit Feasibility Study in 2010. The purpose of the Study was to evaluate the technical and financial viability of a light rail line in Gwinnett County and includes an analysis of mobility alternatives, such as a fixed-guideway transit service along the I-85 Corridor and Satellite Boulevard within the study area. Fixed-guideway refers to any transit service that uses exclusive or controlled rights-of-way or rails.

Additionally, an Alternative Analysis (AA) is currently being conducted as the first step in the Federal project development process to be eligible for New Starts funding. The New Starts program is administered by Federal Transit Agency (FTA) and provides funds for construction of new fixed guideway systems or extensions to existing systems. Any major capital investment funded with FTA funding must be defined and developed through a proscribed process that examines a range of reasonable alternatives and compares the costs and benefits of each alternative.

Table 5.3. Existing Transit

Route	Type	Description	Provider
30	Local	Lilburn/Gwinnett Place/Buford Highway	GCT
40	Local	Lawrenceville/Discover Mills/Gwinnett Place	GCT
10	Local	Discover Mills/Gwinnett Place/Doraville	GCT
103A	Express	Discover Mills Park & Ride Reverse Commute	GCT
103	Express	Discover Mills Park & Ride	GCT
410	Express	Discover Mills/Lindbergh	GRTA
412	Express	Discover Mills/Midtown	GRTA

Source: Gwinnett County Transit, GRTA Xpress

The previous feasibility study proposed a transit line that would extend north along I-85, from the MARTA Doraville station to Gwinnett Mall. The proposed line would then extend along Satellite Boulevard through the study area and connect to the Gwinnett Civic Center. This proposed improvement is consistent with the plan to convert Satellite Boulevard into a "Super Arterial," as described in the planned roadway projects at the end of this chapter. The intent of the AA is to identify a locally preferred alternative that is comprised of a general alignment and technology (e.g., light rail, bus rapid transit, express bus, etc); therefore, the AA will reexamine the recommendations from the feasibility study and conduct a more detailed analysis of the transit need in the study area.

Furthermore, the 2001 LCI included a Transit Circulator Study for the high intensity commercial, office, industrial, and multi-family residential land uses between the Gwinnett Place Mall and Discover Mills Mall areas. It recommended one initial circulator route around Gwinnett Place Mall and two expanded circulator routes, one in the Gwinnett Place Mall area and another in the Discover Mills area. The study determined that fixed guideway options could become viable in the study area as growth continues.

For more details regarding existing and planned transit service in the LCI study area, please see the Current and Planned Transit Service map in **Figure 5.3**.

Pedestrian and Bicycle Facilities

The 2001 LCI Implementation Plan placed significant emphasis on pedestrian mobility in the study area, and anticipated that LCI funds would be used "to construct sidewalks that fill in gaps in the network, as well as reduce the hostile environment for at-grade crossings of roadways by pedestrians." For more detail regarding the existing and proposed bicycle and pedestrian facilities in the study area, please refer to the Bicycle and Pedestrian Feature Map in **Figure 5.4**.

Gwinnett County Transit currently provides connections between Gwinnett Place Mall and Discover Mills.

Figure 5.3 Current and Planned Transit Service

Route	Type	Description	Provider
30	Local	Lilburn/Gwinnett Place/Buford Highway	GCT
40	Local	Lawrenceville/Discover Mills/Gwinnett Place	GCT
10	Local	Discover Mills/Gwinnett Place/Doraville	GCT
103A	Express	Discover Mills Park & Ride Reverse Commute	GCT
103	Express	Discover Mills Park & Ride	GCT
410	Express	Discover Mills/Lindbergh	GRTA
412	Express	Discover Mills/Midtown	GRTA

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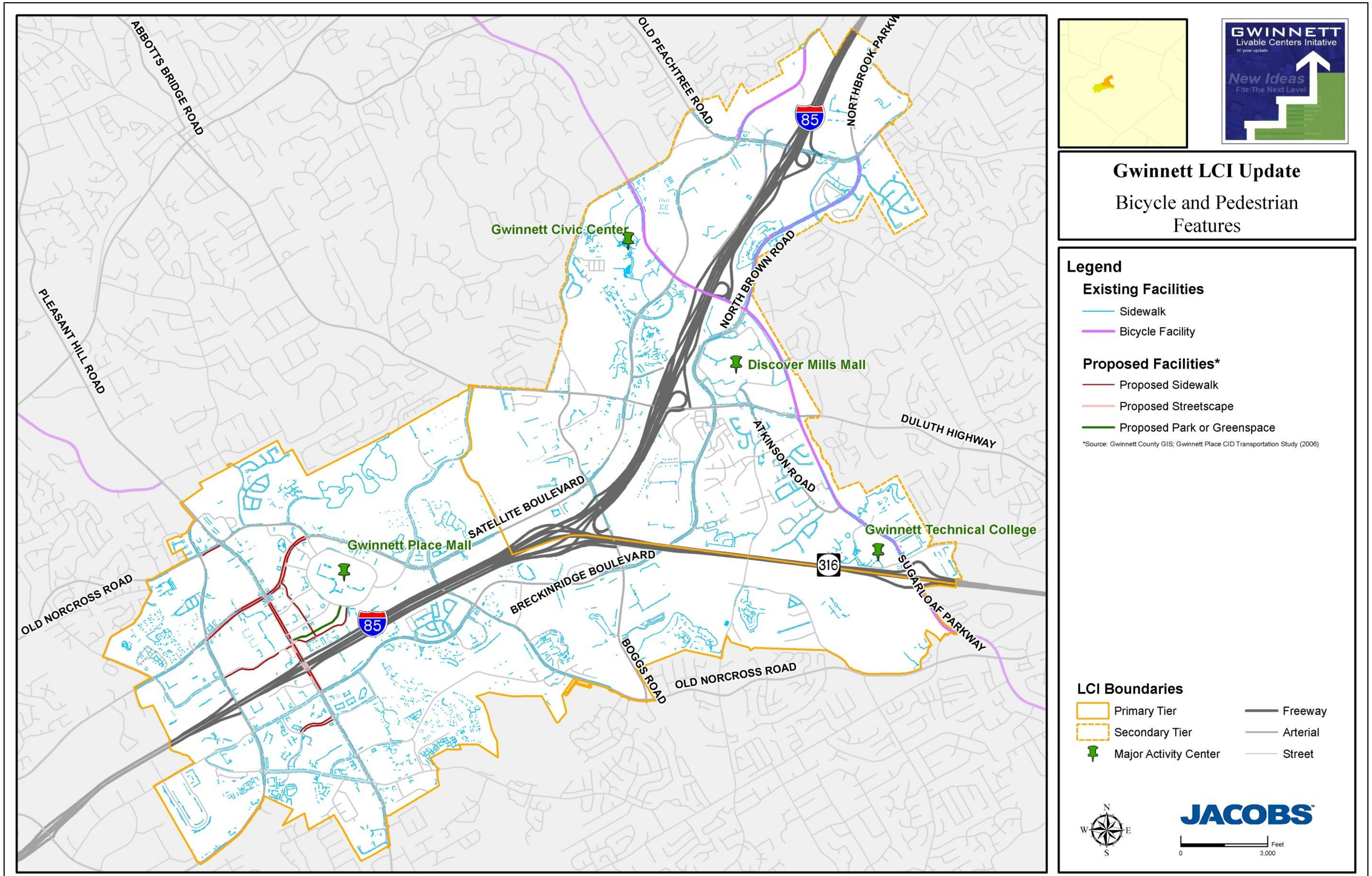
Figure 5.4 Bicycle and Pedestrian Features



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C. Status of Transportation Projects from 2001 Gwinnett LCI

Three roadway projects were identified in the original 2001 “Connect Gwinnett” LCI Study but none have been constructed as of yet. These projects include a new multi-modal arterial to relieve Satellite Boulevard traffic, plus the construction of secondary collector streets and connectors that would relieve local arterials and create a connected secondary system within the LCI Overlay District. The proposed connector system includes new construction projects, as well as retrofits of existing roadways. Although the LCI study did not specify where these roadways would be located, the 2006 Gwinnett Place CID Transportation Study addresses these needs in its recommendations.

The improvements to Satellite Boulevard that were contemplated in the 2001 Gwinnett LCI have been recognized as a regional and countywide need. However, no funding has yet been allocated and this project remains on the list of aspirations. These plans for Satellite Boulevard include widening the roadway to create a “Super Arterial,” which is characterized by grade-separated interchanges at major intersections and limited access.

As part of the 2001 LCI, Gwinnett DOT also evaluated two multi-modal crossing projects and determined that these projects were not cost-effective. These projects crossings would have allowed for transit and pedestrian passage over (or under) I-85. One was to be located north of Pleasant Hill Road and south of Old Norcross Road, while the other was to be either a bridge located north of Sugarloaf Parkway and south of Old Peachtree Road or a transit and pedestrian underpass parallel to Sugarloaf Parkway.

As previously stated, the 2001 Gwinnett LCI emphasized the need for pedestrian improvements. Some of these proposed pedestrian improvements are currently underway as part of the Gwinnett Arena Pedestrian Improvements initiative. These improvements include construction of sidewalks on public streets within 1,500 feet of Gwinnett Transit System (GTS) bus routes.

D. Status of Other Transportation Projects in the Study Area

A number of relevant transportation projects and studies have been completed since the Gwinnett Place LCI Study in 2001. Recommendations from these other studies are described below and presented in **Table 5.4** and **Figure 5.5.**

Completed projects:

<u>Intelligent Transportation System/ Advanced Transportation Management System</u>

A number of Intelligent Transportation System/ Advanced Transportation Management System (ITS/ATMS) projects have been completed along the major routes. These ITS/ATMS projects are cost-effective ways to optimize the operations of existing transportation assets. These projects included the installation of fiber and other communication infrastructure on:

- Pleasant Hill Road from Lawrenceville Highway to Buford Highway, 2011

- Satellite Boulevard from Beaver Ruin Road to Lawrenceville Suwanee Road, 2008
- Old Norcross Road from Breckinridge Boulevard to Pike Street, 2008

I-85 and SR 316 Interchange

The interchange of I-85 and SR 316 reconstruction was a $147 million project that included the construction of 13 bridges, two flyover structures, widening to add HOV lanes, and construction of more than 10 miles of new collector-distributor lanes. The new interchange was opened to traffic on October 2008.

Managed Lanes

Managed lanes in Gwinnett County have been implemented beginning in 2001 with the construction of a 23.6 mile HOV lane. As part of the investment in managed lanes in the study area and beyond, a High Occupancy Toll (HOT) lane is currently underway on I-85 North from Chamblee-Tucker Road south of I-285 to Old Peachtree Road. The HOT lane allows HOV (three persons or more) and bus traffic to travel for free. Other vehicles must pay a toll, which fluctuates with the level of congestion.

ARC PLAN 2040 Planned and Programmed Projects

As with many completed projects, several of the ARC Plan 2040 projects concern the I-85 corridor and/or access to I-85 within the study area. In addition to the completed managed lane project on I-85, many other managed lane projects remain on the list of planned improvements. These managed lanes projects all aim to make the best use of existing lanes on I-85 while also incentivizing carpooling.

Additionally, the following improvements have been recognized as regional needs and are included in ARC's PLAN 2040 Regional Transportation Plan (RTP) or are programmed in the Transportation Improvement Program (TIP).

- I-85 North Diverging Diamond Interchange at Pleasant Hill Rd at I-85 (under construction) – This project involves rebuilding the existing interchange as a diverging diamond (DDI), which will improve the operations and reduce left-turning conflicts. In the long-term, this interchange is proposed to be reconstructed as a Single-Point Urban Interchange (SPUI).
- Bridge Upgrade to SR 120 at Singleton Creek (programmed).
- Intersection Improvements at Pleasant Hill Road at Venture Drive (planning phase).
- West Liddell Rd/Club Drive Connector from Venture Drive to Shackleford Road (RTP and Transportation Investment Act 2010) – This project involves constructing a new alignment providing a connection over I-85 between the Gwinnett Place area and the area south of I-85.
- Managed lanes on I-85 from Old Peachtree Road to SR 211 (long range) – This proposal extends the new managed lanes north to SR 211.

PLAN 2040 Aspirations Projects

The following projects are included in the Aspirations list of ARC's PLAN 2040 Regional Transportation Plan (RTP). They are considered long-term goals and do not have an identified funding source at this time.

- Widening of Satellite Boulevard from Pleasant Hill Road to SR 20 – this project, like the planned project above, would widen Satellite Boulevard to provide relief for I-85.
- Extension of Rail Service from Indian Trail Park and Ride to Gwinnett Arena—this is a long-range fixed-guideway transit project that would connect to the existing MARTA heavy rail system to the south and extend to the Gwinnett Civic Center in the north.
- Collector-Distributor Lanes on I-85 – this project would construct collector-distributor lanes on I-85 to reduce weaving on the Interstate, to enhance safety, and to ensure efficient movement.
- Managed Lanes on SR 316 and I-85 North.
- Extension of Ronald Reagan Parkway from Pleasant Hill Road to Beaver Ruin Drive – this project would extend Ronald Reagan Parkway to improve access between the study area and U.S. 78 in Snellville.

County Comprehensive Transportation Plan Projects

Gwinnett County completed a Comprehensive Transportation Plan (CTP) in 2008 as part of the Gwinnett Unified Plan. The purpose of the CTP was analyze future transportation and land use needs and identify needed improvements. All the projects identified in the CTP are included in the ARC's Aspirations Project list.

Gwinnett Place CID Transportation Study Roadway Capacity Projects

The eight roadway capacity projects recommended by the Gwinnett Place CID Transportation Study (2006) emphasize connectivity as a means of relieving congestion, primarily on Pleasant Hill Road and I-85 near the existing off-ramp. These projects are all located within the primary tier of the study area. Unlike other recommended projects in the area, these projects would primarily benefit local traffic on the surface street network. To this date, none of these recommendations have been implemented. Most are concepts that are subject to further study and funding considerations:

- Venture-Commerce Connector - This new roadway would connect Venture Drive and Commerce Avenue. It would improve connectivity, provide an alternative route to Satellite Boulevard, and allow the opportunity to tie in to the new interstate ramp.
- Breckinridge-Venture Connector - This new roadway would connect Breckinridge Blvd to Venture Drive. It would provide connectivity across I-85 and reduce congestion on Pleasant Hill Road.
- Mall Boulevard Extension/Connector - This new roadway would extend Mall Boulevard to connect with Satellite Boulevard. It would enhance connectivity and reduce congestion on Pleasant Hill Road.
- Merchants Way-Old Norcross Connector - This new roadway would connect Merchants Way to Old Norcross Rd. It would enhance

connectivity and reduce congestion on Pleasant Hill Road.

- Pleasant Hill Steve Reynolds Connector - This new roadway would connect Pleasant Hill Road to Steve Reynolds Boulevard. By providing an alternate route from Pleasant Hill to Steve Reynolds, it would enhance connectivity within the region and mitigate congestion on Pleasant Hill Road.
- Breckinridge-Sweetwater Connector - This new roadway would connect Breckinridge Blvd to the proposed Breckenridge –Venture overpass. It would provide residential and office uses in the area with direct access to the mall area, enhance connectivity within the region, and mitigate congestion on Pleasant Hill Road.
- New Pleasant Hill Ramp Lane - This new ramp lane would provide direct access to the mall from the Interstate. It would separate mall traffic from through traffic and mitigate congestion on Pleasant Hill Road.
- New I-85/316 SB Slip Lane - This new slip lane would provide alternate access to Pleasant Hill Road for southbound motorists. It would also enhance connectivity within the region and mitigate congestion on Pleasant Hill Road.

Regional Thoroughfare Network and the Strategic Thoroughfare Regional Plan

In 2011, ARC adopted the Strategic Regional Thoroughfare Plan. Satellite Boulevard and Pleasant Hill Road are included in the Plan's Regional Thoroughfare Network (RTN). The Plan categorizes the roadways contained in the RTN and provides design and development guidelines for each category. RTN thoroughfares with regional importance may be given funding priority in the future.

Table 5.4 Recommended Transportation Projects from Relevant Studies

Project #	ARCID	PROJECT DECRIPTION	TO/FROM	PROJECT TYPE	STATUS	Source				
						TIP/RTP	ASP	TIA 2010	CID	CTP
1	ASP-GW-377	Satellite Blvd Widening	Pleasant Hill Rd to SR 20	General Purpose Roadway Capacity	Aspirations		X			
2	ASP-AR-403/404	Northeast Corridor High Capacity Rail Service	Indian Trail P&R to Gwinnett Arena	Fixed Guideway Transit Capital	Aspirations		X			
4	ASP-AR-951/952	I-85 North Collector/Distributor Lanes	SR 140 to I-985	General Purpose Roadway Capacity	Aspirations		X			
6	ASP-AR-ML-440	SR 316 Managed Lanes	I-85 to High Hope Road	Managed Lanes (Auto/Bus)	Aspirations		X			
7	AR-ML-410	I-85 North Managed Lanes	Old Peachtree Road to SR 211	Managed Lanes (Auto/Bus)	Long Range	X				
8	ASP-AR-ML-420	I-85 North Managed Lanes	I-285 to I-985	Managed Lanes (Auto/Bus)	Aspirations		X			X
9	GW-309	West Liddell Rd/Club Drive Connector	Venture Drive to Shackleford Road	General Purpose Roadway Capacity	Long Range	X		X		
10	ASP-GW-378	Ronald Regan Parkway Extension	Pleasant Hill Rd to Beaver Ruin Drive	General Purpose Roadway Capacity	Aspirations		X			X
11		I-85 HOV Lanes	Gwinnett County	Managed Lanes (Auto/Bus)	Completed					
12		Satellite Blvd ATMS		ITS-Smart Corridor	Completed					
13		Pleasant Hill Road ATMS		ITS-Smart Corridor	Completed					
14		Old Norcross Road ATMS		ITS-Smart Corridor	Completed					
15		I-85 HOV Lanes	SR 316 to Hamilton Mill Road	Managed Lanes (Auto/Bus)	Long Range		X			X
16		I-85 North Managed Lanes	I-285 to SR 316	Managed Lanes (Auto/Bus)	Completed					
17		Satellite Blvd Super Arterial	Pleasant Hill Rd to SR 20	General Purpose Roadway Capacity	Aspirations		X			X
18	GW-346A	I-85 North Diverging Diamond Interchange	Pleasant Hill Rd at I-85	Roadway Operations	Under Construction	X				
19	GW-290	SR 120 (DULUTH HIGHWAY)	At Singleton Creek	Bridge Upgrade	Programmed	X				
20		Intersection Improvements	Pleasant Hill Rd at Venture Drive	Roadway Operational Upgrades	Planning					
21		Interchange Reconstruction	I-85/SR 316	Interchange Upgrade	Completed					
22		Venture-Commerce Connector	Venture Drive to Commerce Ave	General Purpose Roadway Capacity	Long Range				X	
23		Breckinridge-Venture Connector	Breckinridge Blvd to Venture Drive	General Purpose Roadway Capacity	Long Range				X	
24		Mall Boulevard Extension/Connector		General Purpose Roadway Capacity	Long Range				X	
25		Merchants Way-Old Norcross Connector	Merchants Way to Old Norcross Rd	General Purpose Roadway Capacity	Long Range				X	
26		Pleasant Hill Steve Reynolds Connector	Pleasant Hill Rd to Steve Reynolds Blvd	General Purpose Roadway Capacity	Long Range				X	
27		Breckinridge-Sweetwater Connector	Breckinridge Blvd to Sweetwater Rd	General Purpose Roadway Capacity	Long Range				X	
28		New Pleasant Hill Ramp Lane	I-85 SB Exit Ramp to Venture Pkwy	General Purpose Roadway Capacity	Long Range				X	
29		New I-85/316 SB Slip Lane	I-85 SB before Pleasant Hill Rd Exit	General Purpose Roadway Capacity	Long Range				X	

Sources: ARC PLAN 2040 (2011); Transportation Investment Act of 2010, Constrained List; Gwinnett Place CID Transportation Study (2006); Gwinnett County Comprehensive Transportation Plan (2008).

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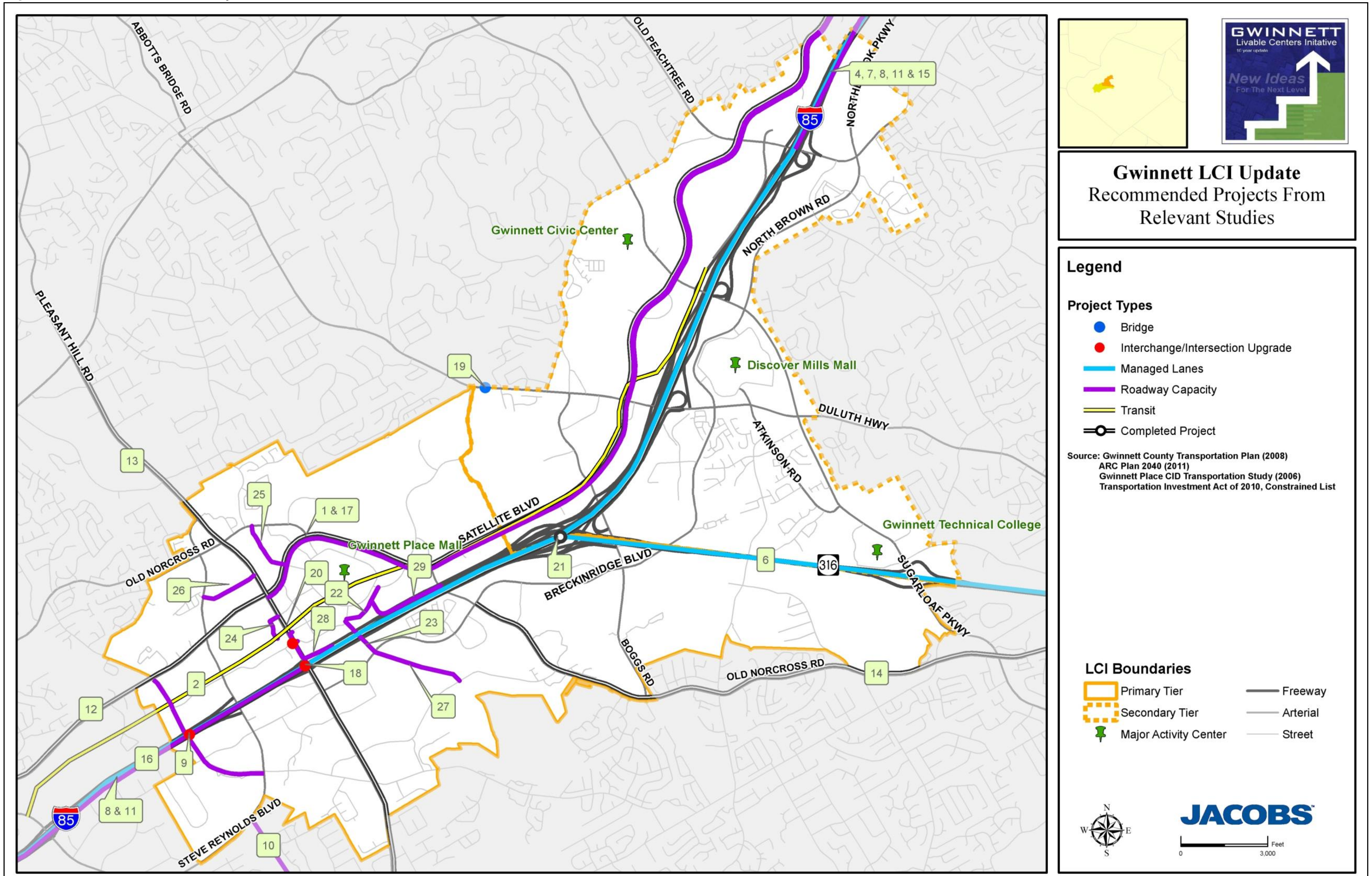
Figure 5.5 Recommended Projects from Relevant Studies



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6. Urban Design Analysis

A. Assessment of Architectural Character

The character areas within the study area consist mostly of commercial, office/industrial, and pockets of multi-family residential. Some uses have a more unified style than others, but there is no unified architectural character or design theme. The Gwinnett Place Community Improvement District has constructed banners and wayfinding signage in the right of way that are intended to begin the branding process at strategically located gateways. Other than this branding and wayfinding initiative, there is an overall deficiency of common design elements. This leaves residents and visitors unable to recognize where Gwinnett Place begins and ends.

A 'sense of place' can be achieved by incorporating recurring design elements that encourage the human eye to recognize and associate them. Examples of these elements include: architectural style, building materials, streetscape design, landscape elements, and visual landmarks and wayfinding. For example, one may be able to identify a city or part of town by simply recognizing the style of architecture. A character area that provides a sense of place often incorporates several design elements specific to the area, and often has a cultural or geographical influence.

Downtown Smyrna and Savannah are examples of places that exhibit unique architectural styles and design elements.

Savannah, Georgia

Smyrna, Georgia

A simple way to encourage visitors and residents to feel a sense of place is to incorporate wayfinding elements such as signage and landmarks. The Gwinnett Place CID has done so with the use of banners, signage, and wayfinding markers.

Gwinnett Place CID signage incorporates directional signage cues and recognizable landmarks.

The Gwinnett Place CID has also provided landscape improvements to prominent gateways to I-85 and has implemented several streetscape improvement projects on Pleasant Hill and Old Norcross Roads. These attractive streetscape elements are a promising start to beautifying the study area and providing the framework for a cohesive, unified design theme. These wayfinding and landscape elements could be implemented throughout the entire study area to create a more unified sense of place.

Certain land uses, such as office, do have some common design elements. Many of the midrise offices use similar architectural materials and treatments; however, these materials are typical of office buildings everywhere. In addition, many of the office parks have attractive entry signs, but there is not a common appearance to the signs. A shared design for entry signage would contribute to the character of the area.

Typical mid-rise office building.

The same problem exists for the commercial areas; however, the appearance of this land use is even less cohesive than the office uses. For example, big box retailers on Venture Drive, the Auto Mall area, and the Gwinnett Place Mall vicinity are all viable businesses; however several other shopping centers are outdated or vacant. Buildings are setback too far from the road with huge spans of asphalt in between. This type of development provides poor access and little relief for pedestrians navigating the parking lot or walking store to store.

This half-vacant commercial development exhibits a massive span of asphalt without trees for shade.

B. Design Elements

Walkability

The study area has a familiar trait common to many suburban areas: dependence on the automobile. Large distances separate functionally related uses, making it virtually impossible for alternative travel modes to be feasible to the average person. This auto-dependence is reinforced within the study area because alternative modes of transportation are not available in all areas.

Other "barriers to walkability" also contribute to the auto-dependence within the study area. For example, as previously mentioned, buildings are typically setback too far away from the street and do not create a relationship with the streetscape—instead, these large setbacks only serve as storage space for vehicles. This characteristic of suburban areas often encourages people to drive rather than walk to their next destination, even for short distances.

Providing improved pedestrian access and connections, streetlights, and street trees would encourage people to walk to their destination and would improve pedestrian safety. Sidewalks do not exist at all in some areas within the study area and many are in need of repair. Because many roadways within the study area experience frequent, high speed traffic, pedestrians will not feel safe crossing major intersections without the proper signals, crosswalk markings, and pedestrian refuge islands.

A busy street in Athens, Georgia provides a safe, well-marked crossing for pedestrians.

The refuge island provides a safe zone for pedestrians crossing a busy street.

Signage

Although the Gwinnett Place CID has made much progress in implementing signage and wayfinding elements for the area, there is a very limited amount of pedestrian-oriented signage. In conjunction with sidewalk and crosswalk improvements, providing adequate signage will increase pedestrian safety and attract more pedestrian traffic. Providing clear and navigable pedestrian connections will enhance the comfort of pedestrians and will increase the likelihood that a person will choose to walk from one destination to the next.

Additionally, the overuse of unattractive billboards, utility markers, and business signs can be more distracting than helpful. Too many signs and utilities can clutter views and distract drivers.

Cluttered views on Pleasant Hill Road.

Streetscape Elements

The Gwinnett Place CID has also improved several thoroughfares with the addition of streetscape elements such as streetlights, sidewalks, pavers, and landscaping. However, many streets within the study area have sidewalks that are too narrow, incomplete, broken, or even non-existent. Few sidewalks have streetlights, street trees, or landscaping, which would provide shade and comfort for pedestrians. Furthermore, many crosswalks are not properly marked or signaled, which creates an unsafe crossing environment for pedestrians.

This sidewalk along Pleasant Hill Road is narrow and has no trees to provide shade.

These issues of walkability and pedestrian safety have not gone unnoticed by the Gwinnett Place CID. Many streetscape and pedestrian amenity projects are currently underway or are planned for future construction. See **Chapter 2 Existing Plan Assessment** and **Chapter 5 Transportation** for details on these recent and upcoming sidewalk and streetscape improvements within the Gwinnett Place CID planning area.

Alternate Transportation

Another important element of the public realm is alternate transportation. The study area is already served by a number of bus stops and a bus transit center; however, many stops have inadequate or no shelters and little signage. Additionally, bus stops and transit hubs are often inhospitable to pedestrians and lack sidewalk connections to surrounding areas.

Gwinnett County Transit Center.

Few bicycle lanes currently exist in the study area. Portions of Sugarloaf Parkway near I-85 currently have bicycle lanes; however, these routes are not highly frequented by bicyclists because of safety concerns.

Urban Design Features Map

The Gwinnett LCI Baseline Conditions Map, **Figure 6.1** below, provides an illustrated guide to the urban design features in the Primary Tier of the study area. More specifically, the Baseline Conditions Map illustrates the following:

Major Thoroughfares – One of the most dominant features in the study area is the freeway "wishbone" of I-85 and GA 316. This massive roadway configuration almost completely divides the study area and creates both a physical and visual barrier.

The motorist's view-shed along the I-85 corridor is the primary 'urban scene' that the public associates with the area. More people pass through the study area on these freeways than live, work or play here. Therefore, this "view from the road" is a critical component in the urban design fabric of the study area.

Pleasant Hill Road is also a major thoroughfare that bisects the study area into east and west parts. The many telephone poles, wires and commercial signs along Pleasant Hill create an unpleasant edge condition—and although there are crosswalks at major intersections, the highway is wide and lacks landscaping or other ways to visually frame the corridor.

Land use - Land uses are shown in a variety of colors within the Baseline Conditions Map. The edges of these land use areas form relatively clear "pods" of inwardly directed uses that are surrounded by extensive parking fields. These extensive parking lots are a result of zoning standards that were in effect in previous years. The dominant land use is the commercial core surrounding the Gwinnett Place Mall.

Massing - Massing within the study area is primarily characterized by low, monotonous one-story buildings and featureless parking lots. The majority of commercial buildings are one story. The exceptions on the northeast side of I-85 are the Gwinnett Place Mall, which is not clearly visible from the major thoroughfares, and several mid-rise office buildings. On the southwestern side of I-85, the Marriott Hotel and several high-rise office buildings stand out visually and create points of attraction.

Residential areas are visually and functionally distinct due to their softer landscaped edges. Single family neighborhoods seem to fill the voids between the more severe commercial landscapes of retail, warehouse, and office land uses.

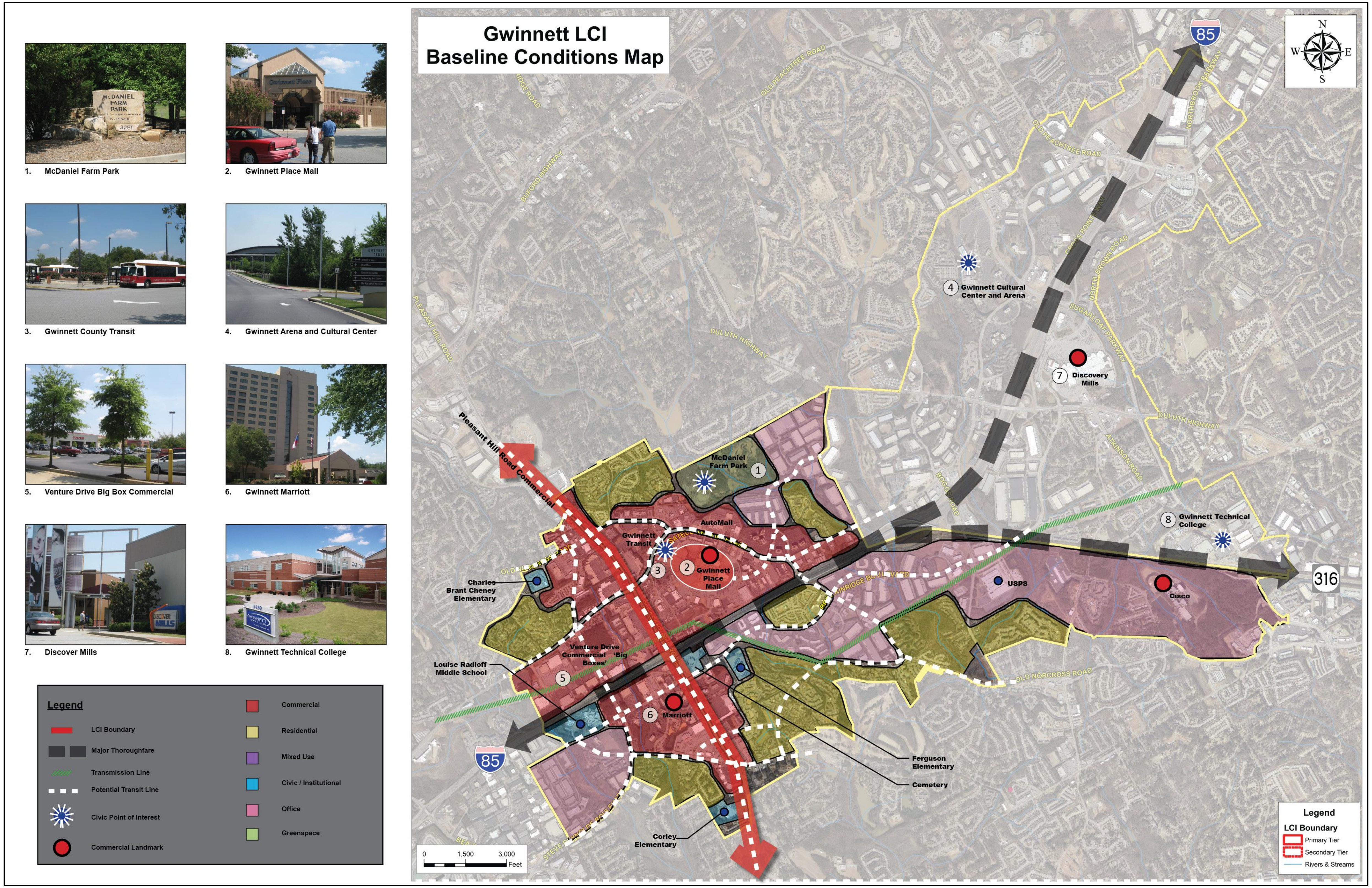
Greenspaces – There are two fundamentally different greenspaces that stand out functionally and visually in the study area. First is the extensive cemetery along Breckinridge Boulevard. This landscape is relatively flat, and has a formal, fenced boundary that is ordered by the broad lawn and punctuated by grave markers and monuments. Trees stand out starkly against this backdrop.

Second is the McDaniel Farm Park. This park is more heavily forested and garden-like, with rolling topography and landscape elements that provide variety and form spaces within the park.

Civic uses – The primary civic use other than parks are schools, including Corley

Elementary School, Ferguson Elementary School, Charles Brant Elementary School, and Louise Radloff Middle School. However, these civic uses are scattered throughout the study area and are often unrelated and detached from abutting uses. The public spaces within the study area lack orderly arrangement and connectivity to surrounding landscapes.

Figure 6.1 Gwinnett LCI Baseline Conditions Map



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7. Implementation Issues

A. Lessons Learned

The Livable Centers Initiative (LCI) Record of Accomplishments for the ten-year period 2001-2011 for the Gwinnett LCI plan was shown in **Chapter 2 Existing Plan Assessment**. It reports the status and schedule of implementation action for all the projects that were part of the original five-year prioritized projects and implementation strategies prepared in 2001. The implementation strategies were identified in terms of three categories established from Atlanta Regional Commission's (ARC) template for preparing a five-year prioritized list of projects:

1. Transportation improvements – these included two transit/pedestrian bridges, one underpass across I-85, and numerous street connections and sidewalk /streetscape projects, some of which were not clearly identified. There was also a list of 27 greenway/trail segments.
2. Park and Greenspace Acquisition – a greenspace trailhead on the eastern end of the study area.
3. Housing Initiatives –broad goals such as jobs-housing balance and a broader mix of housing choices through zoning ordinances and Comprehensive Plan policies.

The cost of these projects totaled over $79 million. Gwinnett County and the Gwinnett Place Community Improvement District (CID), which had not yet been created, were the primary funding sources.

Successes

The LCI Five-Year Update, prepared by Gwinnett County, spoke to the County's success in creating the centerpiece of the Activity Hub - construction of the Gwinnett Center (Civic Center and Arena) and development of a Transit Hub and Park and Ride Lot. In addition, several amendments to the 1985 Zoning Resolution were accomplished that give new opportunities for high density housing and mixed-use development in the study area.

Barriers to Success

The LCI Five-Year Update also listed fundamental barriers to achieving the objectives of a truly Livable Community in the Primary Tier of the Study Area, such as the low density of housing and the isolation of these neighborhoods with respect to jobs, retail and support services. This can be attributable to current zoning and Comprehensive Plan policies and the lack of transportation connectivity between neighborhoods and non-residential development.

The primary barriers to implementation of the listed projects that were discussed included:

- Lack of a formal coordination mechanism to link transportation decision making with land use decision-making

- Lack of an appropriate advocate or "champion" for LCI projects in the Primary Study Area.

In the southern end of the study area, now the Primary Tier, the formation of the Gwinnett Place CID and Tax Allocation District (TAD) in 2001 has enabled an extensive degree of public improvements. The Gwinnett Place CID has been the instigator of many of the major improvements and has used its technical and financial support to leverage substantial public investments; however, the majority of these projects were not included in the 2001 LCI study, but were instead determined from priorities set by the Board of Directors of the Gwinnett Place CID.

In recent discussions with the Gwinnett County staff, it is clear that the biggest problem of all was not stated: the project list was out of scale with realistic funding potential. The large scale projects of the original vision often required modifications of the interstate highway system. Implementing these projects would require a complex process of study, commitment, funding and authorizations at the regional, state and federal levels. For instance, it was determined that constructing bridges and overpasses across I-85 would cost over $25 million dollars. The local match would have required that a disproportionate share of local SPLOST proceeds be committed to a small area of Gwinnett County.

Similarly, the nature and cost of the greenway improvements were out of scale and out of place with the priorities of the Gwinnett County *Open Space and Greenway Master Plan* that came forth a few years after the LCI project. The County's greenspace priorities were placed in less developed areas of the county, where land prices were not as great as in the heart of the developed areas in the I-85 corridor. A number of the trails proposed in the LCI study were to be placed within the property owned by Gwinnett County for the Gwinnett Center, but these trails were not coordinated with the Gwinnett Center Master Plan and never occurred. Constructing these trails at this phase of the Gwinnett Center development would be much more expensive.

Notably, the issues previously discussed are still valid. The original LCI report recommended that a CID be formed for the Sugarloaf Parkway/Gwinnett Center area to serve as a "champion" for the needs of the area and to marshal more resources for implementation. However, this initiative never materialized because there was too little local interest and no point person to organize the proposed CID.

B. Factors for Future Success

There are four reasons why the LCI Update study should be more successful than the first:

1. The LCI Update changes the focus to the Gwinnett Place area. The new Gwinnett Place CID can provide strong leadership to pursue funding and coordinated support for LCI-type projects. This has been demonstrated already by the long list of accomplishments of the Gwinnett Place CID (see **Chapter 2**).

2. Gwinnett County has a new Unified Plan that stresses the importance of developing connected, walkable, mixed use Regional Mixed Use Centers linked to a potential regional transit system.
3. Recent transportation initiatives, such as the re-designed GA 316/I-85 interchange, new HOT lane project on I-85 and the on-going re-construction of the I-85/ Pleasant Hill interchange to a diverging diamond design, will increase traffic access. (However it will cause construction turmoil in the short-term);
4. The Atlanta Region has expressed strong support for regional public transportation system in the I-85 corridor; a new Alternatives Assessment is underway that could open the door to a federally funded regional transit system to serve this part of Gwinnett County and stress the need for walkability.

C. Potential Obstacles

The major issues that may slow implementation of LCI measures are varied. These obstacles discussed below will be among the implementation issues that must be addressed through an invigorated campaign focused on the new Primary Tier of the LCI Update focused in the Gwinnett Place area and relying heavily on the leadership of the Gwinnett Place CID. They include:

1. Physical challenges of the study area:

- A large land mass without a strong focus
- The “barrier effect” of the I-85/GA 316 “wishbone” that divides the study area and makes it harder to achieve local mobility across the study area;

2. The extremely slow economy that began to decline from a peak in 2006 has not shown strong signs of recovery and leads to other major issues related to this “Great Recession”:

- The burst of the real estate “bubble” that led to downward spirals in property values and leases, cancelled real estate deals and increase in vacant property;
- New standards for real estate finance that avoid “high-risk” investments in mixed use development projects; and
- Lack of public revenues resulting from the economic downturn caused austere budget cuts at the local, state, and federal levels that reduce the supply of government grants and makes them harder to win.

3. The virtual “build out” of the study area in a classically low-density suburban framework leads to several related implementation barriers:

- Lack of available land for new development – pressing the need for much more expensive forms of redevelopment of existing developed property:
- Retail competition from the Mall of Georgia and Discover Mills centers has outpaced Gwinnett Place Mall retailers; and
- Rapid demographic changes in the study area, such as increased entry of Asian households and businesses,

require that property managers re-position their offerings.

4. Area merchants lack a collective vision and shared direction for future development. The more established business owners in the area have been unable to “read” the new directions being set by changing demographics and buying patterns in the marketplace. Therefore, they are having difficulty finding an economically viable solution to revive their aging commercial centers. New ethnic owners tend to work independently toward capturing the market of a specific nationality. These businesses will need a cooperative spirit and a common will to establish a truly international market place with a broader, more inclusive market base.

Appendix A: Real Estate Market Analysis

As part of the Gwinnett Livable Centers Initiative (LCI) 2011 Update Study, this Market Analysis Appendix provides an inventory and assessment of real estate and demographic trends affecting historical and future development patterns in the study area. This analysis provides a framework for the consulting team's recommendations regarding land use and development policy recommendations in the future. It includes assessments and analysis of:

- **Demographic Characteristics**- An overview of population, households and housing characteristics in the study area, compared against the background of Gwinnett County and the Atlanta Metropolitan area.
- **Business and Employment:** An overview of businesses and employment in the study area.
- **Real Estate Market Characteristics**- An analysis of the current inventory and recent market trends for residential and commercial uses within the study area.
- **Retail Spending Analysis:** An analysis of retail supply and potential demand in the study area, along with estimates of sales tax estimates resulting from study area retail activity.

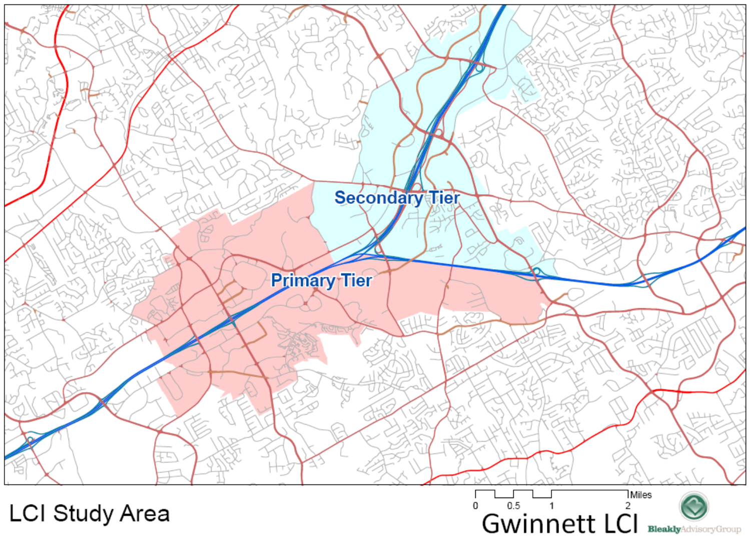
This section was prepared by Bleakly Advisory Group, Inc.

A. Study Area and Demographic Boundary Description

LCI Study Area

The LCI study area was defined in original 2001 study. The study area includes the commercial CORE of Gwinnett County, originally built around the Gwinnett Place Mall, and gradually extending northward. For this update study, the LCI study area is divided into two tiers: The Primary tier (Gwinnett Place) and Secondary tier (Sugarloaf Parkway & Discover Mills). The study area is divided by Interstate 85 and Highway 316.

Figure A-3.1: Gwinnett LCI Study Area Map (Tiers)



Source: BAG

Data Sources and Geographies

Demographic data for this study were obtained primarily from The United States Census Bureau and from Claritas, a national provider of demographic and market data. To best take advantage of the strengths of each data source, the boundaries of the overall study area and its two tiers was approximated to correspond with data collection methodologies.

Demographic Data Sources

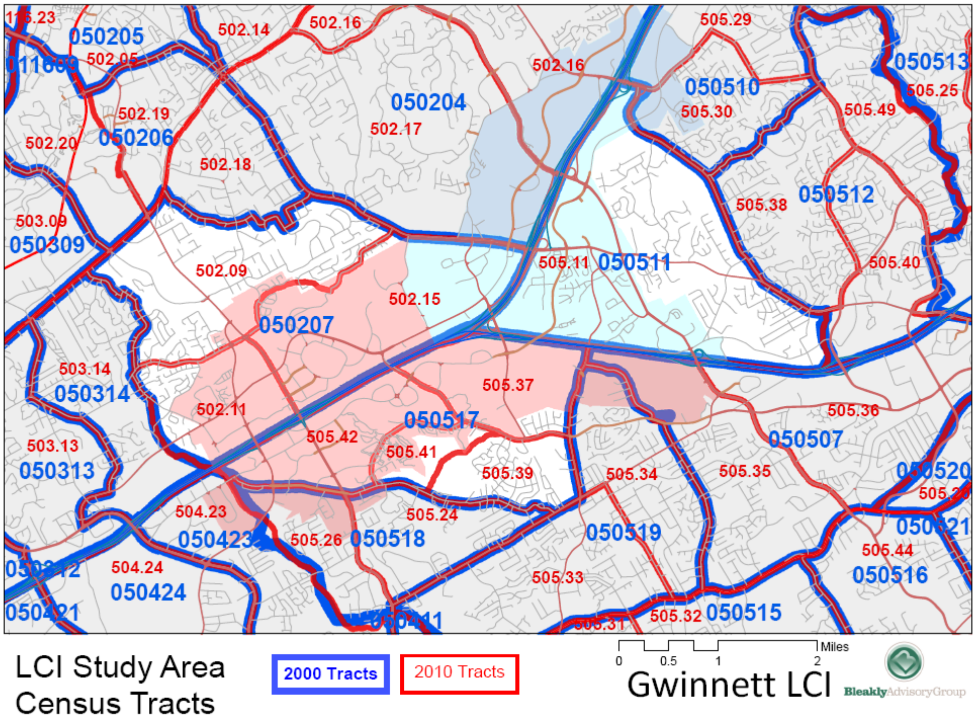
- **Census Data:** Census data provides the most reliable way to track an area's change over a ten-year period.
  - Census-based analysis of the LCI study area combines three year-2000 census tracts 205.07, 505.11, and 505.17. Census data for these three tracts will be compiled to form the basis of the analysis of population and ethnic change over time.
  - These three tracts were subsequently subdivided into eight tracts for the 2010 Census, shown below.

Table A-3.1: LCI Study Area Census Tracts: 2000 & 2010

2000 tract	2010 Tracts
502.07	502.11 , 502.15, 502.09
505.11	505.11
505.17	505.41, 505.42 505.37 505.39

Source: BAG

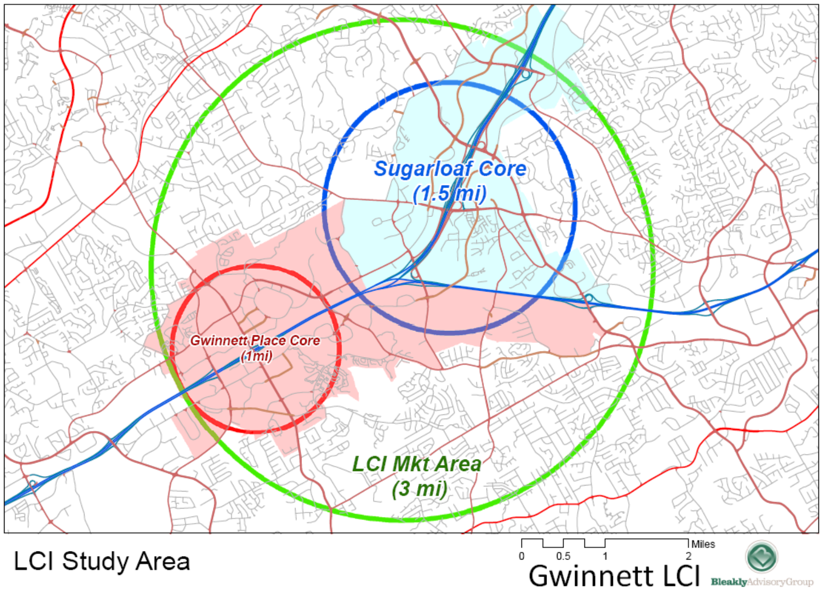
Figure A-3.2: 2000 & 2010 Census Tracts Map



Source: BAG

- **Claritas Data:** Much of the detailed demographic data used in this analysis was obtained from by Claritas, Inc, a national provider of demographic and market data. Claritas data provides the most detailed current estimates of demographic characteristics in the study area.
  - The LCI Area was approximated using radii to approximate the individual study area tiers and the overall study area. For the purposes of this demographic analysis, these radii were:
    - **Gwinnett Place Core**: A 1-mile radius, centered on the intersection of Venture Parkway and Market Street, adjacent to the Hyatt Place Hotel. This area approximates the Gwinnett Place CID boundary, and represents the Primary Tier of the LCI study area.
    - **Sugarloaf Core**: A 1 ½ -mile radius centered at the intersection of Duluth Highway and Interstate 85, to the west of Discover Mills. This radius approximates the Secondary tier of the LCI area.
    - **LCI Study Area**: A 3-mile radius centered at the intersection of Interstate 85 and Hwy. 316 represents the total LCI study area.

Figure A-3.3: Study Area Radii for Demographic Analysis

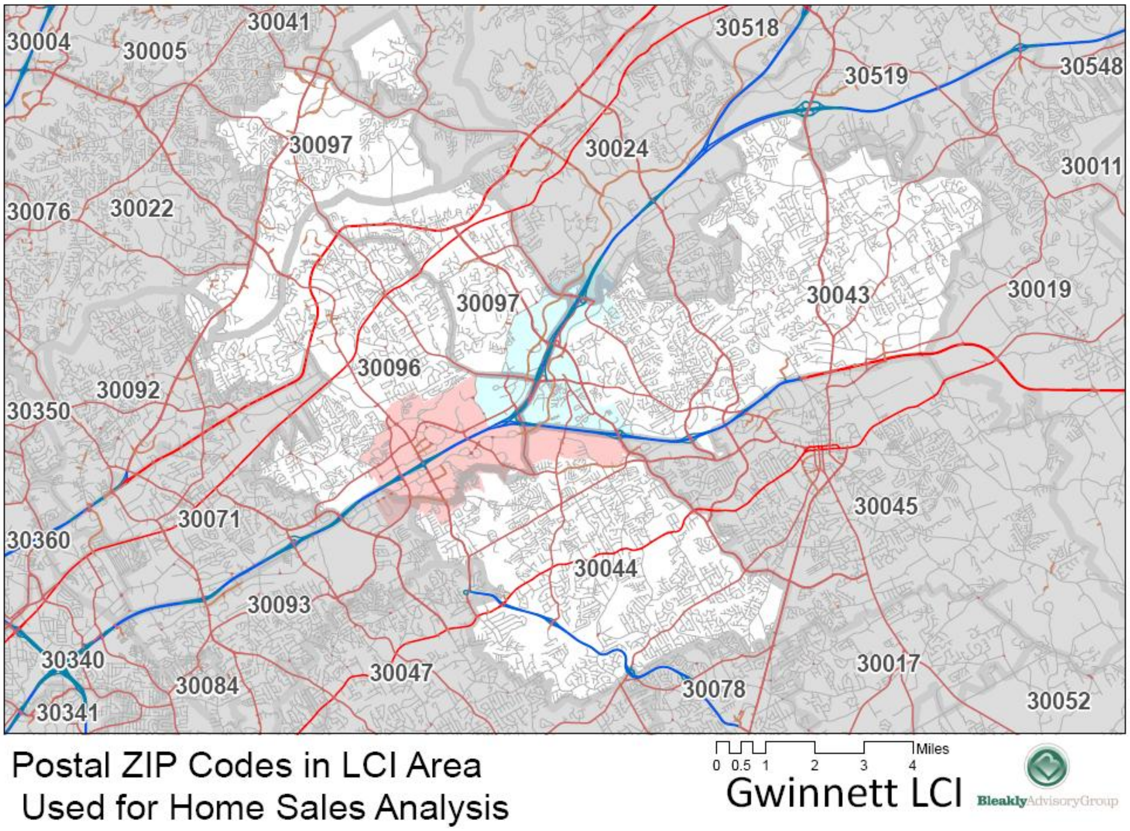


Source: BAG

Real Estate Data

- **Home Sales Data:** Home sales information is provided by SmartNumbers, Inc, a local data research firm which tracts new and existing home sales in the Atlanta region through public filings. SmartNumbers data is compiled by ZIP Codes.
  - Four ZIP codes used to represent the LCI study area are:
    - 30043 (Dacula/ Discover Mills)
    - 30044 (South of study area/East Lilburn/West Lawrenceville)
    - 30096 (Gwinnett Place/Pleasant Hill, W Duluth)
    - 30097 (Sugarloaf)
- **Apartment Data:** was obtained from field data collection and internet research, with trend data provided by Reis Reports.
- **Commercial Real Estate Data** was obtained from CoStar, Inc. A national Real Estate Data firm.

Figure A-3.4: Postal ZIP Codes Used for Home Sales Analysis



Source: BAG

B. Demographic Analysis

This section presents analysis of the key demographic trends that define the residents of the Gwinnett LCI study area.

Population History & Forecast (Claritas)

- The LCI study area's population in 2010 was 81,348 up from 27,615 in1990.
- The LCI area has experienced phenomenal growth in the 1990. Population in the LCI study area increased at an overall rate of 8.1% annually in the 1990s, with the Sugarloaf Core expanding even more rapidly, at a rate of 10.6% rate annually.
- Population growth slowed dramatically from 2000 to 2010, growing at a 2.8% annual rate since 2000, slightly ahead of the region's 2.5% growth rate.
- Population in the area is projected to continue to increase at a steady 2.2% over the next five years, still exceeding county-wide, region-wide and State-wide growth. The study area population is projected to grow to 103,000 by 2020.

- If the study area were incorporated, it would be the 9th largest city in Georgia, between Roswell and Albany.
- Roughly one-in-ten Gwinnett residents currently live in the LCI study area.

Table A-3.2: Population Growth & History

Population1990-2016	Gwinnett Place Core	Sugarloaf Core	LCI study area	Gwinnett County	Atlanta CSA
1990	2,670	3,149	27,615	352,910	3,069,411
2000	6,083	8,623	59,915	588,448	4,247,981
2011 Estimate	7,719	14,368	81,348	815,342	5,569,195
2016 Projection	8,728	16,633	92,518	919,135	6,182,135
2020 Projection	9,669	18,791	102,989	1,015,653	6,744,145
CAGR 1990-2000	8.6%	10.6%	8.1%	5.2%	3.3%
CAGR 2000-2011	2.2%	4.8%	2.8%	3.0%	2.5%
CAGR 2011-2016	2.1%	2.5%	2.2%	2.0%	1.8%

Source: Claritas, Inc. CAGR= Compound Annual Growth Rate

Long Term Population and Household Forecasts

The Atlanta Regional Commission (ARC) has prepared long range projections of population and employment for Gwinnett County and the North Gwinnett Super-District. Based on these forecasts:

- The ARC anticipates that Gwinnett County will increase in population by 54% over the next thirty years, from 758,000 in 2010 to 1,170,600 in 2030, a compound annual growth rate of 1.5%

- Based on this growth rate, the study area's population is projected to increase by nearly 30,000 over 30 years, from 46,063 in 2010 to 71,136 in 2030.

- Households in the study area will grow from 14,988 in 2010 to 24,747 by 2040, with households averaging of 2.8 to 2.9 persons per household over the period.

- Employment will increase in Gwinnett County at a rate of 1.9% compounded annually over the next 30 years. Thus, from a base of 50,373 jobs, the LCI study area will gain over 38.000 jobs by 2040.

Table A-3.3a: Population, Household & Employment Long-Range Forecasts

	2010	2016	2020	2025	2030	2035	2040	2010-2040 CAGR
Population								
Gwinnett County	751,938	832,550	893,661	959,789	1,027,462	1,103,491	1,153,982	1.44%
N Gwinnett Super District	166,412	188,981	207,757	227,321	247,673	270,996	285,557	1.82%
LCI Study Area	81,348*	90,625	99,629	109,011	118,771	129,955	136,938	1.82%
Households								
Gwinnett County	265,100	297,363	320,945	347,218	373,691	404,282	425,050	1.59%
N Gwinnett Super District	57,948	66,661	73,741	81,253	88,992	98,058	103,710	1.96%
LCI Study Area	29,426*	33,207	36,734	40,476	44,332	48,848	51,663	1.96%
Employment								
Gwinnett County	288,930	352,841	380,118	417,719	438,656	482,048	508,847	1.90%
N Gwinnett Super District	53,352	64,366	69,653	76,623	81,057	89,168	94,549	1.93%
LCI Study Area	55,344*	65,501	70,881	77,973	82,486	90,740	96,216	1.93%

Source: BAG, ARC, US Census, Claritas, Inc. * 2011 Data

Households and Household Composition

- There are approximately 29,500 households in the LCI study area, with 3,170 households in the Gwinnett Place Core and nearly 5,000 in the Sugarloaf Core. The remaining households are located in residential neighborhoods outside of the two COREs, at the edges of the study area..
- As with population, the number of households grew most rapidly in the 1990s, with the pace slowing in the 2000s.
- In terms of household composition, married couples both with and without children account for 45% of households, with non-family households (singles and un-related individuals) representing 35% of Households.
- The Gwinnett Place Core has significantly different household characteristics than the Sugarloaf Core and the rest of the metro region:
  - Over half of Gwinnett Place Core households are "Non-Family "households, compared to 23% in the Sugarloaf Core, and 26% regionally.
  - Gwinnett Place households tend to be smaller, with a third of households being singles.

Table A-3.3b: Household Growth & History

Houshold1990-2016	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
1990 Census	1,252	1,156	10,900	126,971	1,140,838
2000 Census	2,567	3,081	22,476	202,317	1,554,154
2011 Estimate	3,170	4,976	29,426	270,188	2,005,649
2016 Projection	3,597	5,787	33,503	304,229	2,215,420
2020 Projection	3,996	6,563	37,329	335,851	2,406,894
CAGR 1990-2000	7.4%	10.3%	7.5%	4.8%	3.1%
CAGR 2000-2011	1.9%	4.5%	2.5%	2.7%	2.3%
CAGR 2011-2016	2.1%	2.5%	2.2%	2.0%	1.7%

Source: Claritas, Inc.

Table A-3.4: Family Household Type 2011

2011 Est. Family HH Type, Presence Own Children	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
Married Without Children	13.3%	23.5%	20.6%	26.4%	26.3%
Married With Children	14.3%	28.4%	24.0%	31.0%	24.4%
Single Parent with Children	12.7%	13.5%	12.5%	10.8%	11.0%
Other Family	8.3%	6.6%	7.8%	7.2%	8.3%
Non-Family	51.3%	28.1%	35.2%	24.6%	29.9%

Source: Claritas, Inc.

Table A-3.5: Household Size 2011

2011 Est. Households by Household Size	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
1-person household	33%	18%	23%	17%	22%
2-person household	31%	30%	30%	29%	31%
3-person household	16%	20%	19%	20%	19%
4-person household	11%	18%	15%	19%	16%
5-person household	5%	8%	8%	9%	7%
6-person household	2%	3%	3%	3%	3%
7 or more person household	2%	2%	2%	2%	2%
2011 Est. Average Household Size	2.40	2.89	2.75	2.99	2.73

Source: Claritas, Inc.

Race & Ethnicity

Gwinnett County in general and the LCI study area in particular, have seen remarkable shift in racial and ethnic composition over the past ten years.

- Between 2000 and 2010, Gwinnett County has added 219,000 net new residents. White residents accounted for less than 1% of that gain, while non-whites represent 99%, of Gwinnett County's growth, representing 217,000 new residents.
  - County-wide, African Americans showed the largest net gains, with 112,000 new residents increasing their share of the county population from 14% to 24%.

- Asians nearly tripled their presence in Gwinnett County, from 25,000 to over 70,000 residents, increasing their share of the County's population from 4% to 9%.
- During the same period, the percentage of Gwinnett residents identifying as Hispanic or Latino increased from 11% to 20%.

Table A-3.6: Population by Race, Change from 2000 to 2010, Gwinnett County

	Population	Population by Race							Population by Hispanic or Latino Origin	
Year	Total	White	Black /African American	American Indian	Asian	Hawaiian or Pacific Islander	Other Race	More than One Race	Hispanic	Non Hispanic
2000 Total	**571,495**	**427,883**	**78,224**	**1,638**	**25,407**	**263**	**25,407**	**12,673**	**64,137**	**524,311**
2000-2010 Chg	*219,026*	*1,680*	*111,943*	*2,400*	*45,085*	*214*	*45,085*	*12,619*	*97,898*	*118,975*
2010 Total	**790,521**	**429,563**	**190,167**	**4,038**	**70,492**	**477**	**70,492**	**25,292**	**162,035**	**643,286**
2000 Share		75%	14%	0%	4%	0%	4%	2%	11%	89%
2010 Share		54%	24%	1%	9%	0%	9%	3%	20%	80%

Source: US Census

Racial and Ethnic Shifts in Study Area 2000-2010

The racial composition of the LCI study area has become significantly more diverse than the County as a whole.

- In 2000, whites accounted for 55% of the study area's population. By 2010, Non-whites accounted for the majority of residents in the study area (65%), with 29% African-Americans, 18% Asians, and 18% other racial groups. In contrast, non-whites represent 46% of the population of Gwinnett County and 42% of the Atlanta region.
- Hispanics and Latinos have a substantial presence in the LCI study area, with 31% of the total population. Compared to 20% of the population of Gwinnett County and 10% of the Atlanta region.
- From 2000 to 2010, the overall population of the study area increased by 10,073.
  - The white population in the area declined by 3,761 people while the non-white population increased by 13,834.

Table A-3.7: Study Area (3 Tract) Population by Race, Change from 2000 to 2010

Year	Population	Population by Race							Population by Hispanic or Latino Origin	
	Total	White	Black /African American	American Indian	Asian	Hawaiian or Pacific Islander	Other Race	More than One Race	Hispanic	Non Hispanic
2000Total	**35,990**	**19,843**	**7,962**	**112**	**4,644**	**6**	**2,192**	**1,231**	**64,137**	**524,311**
2000-2010 Chg	*10,073*	*(3,761)*	*5,495*	*195*	*3,826*	*28*	*3,772*	*518*	*97,898*	*118,975*
2010 Total	**46,063**	**16,082**	**13,457**	**307**	**8,470**	**34**	**5,964**	**1,749**	**162,035**	**643,286**
2000 Share		55%	22%	0%	13%	0%	6%	3%	11%	89%
2010 Share		35%	29%	1%	18%	0%	13%	4%	31%	69%

Source: US Census

Of the study are population classified as Asian in 2011, the following national origins are represented:

Table A-3.8: Study Area Asian Population segmented by National Origin,

Asian population, National Origin	LCI Market Area
Chinese, except Taiwanese	12%
Filipino	2%
Japanese	2%
Asian Indian	27%
Korean	25%
Vietnamese	20%
Other	13%

Source: Claritas

Age

- LCI study area residents tend to be slightly younger than their regional counterparts, with a median age of 32.3 vs. 33.6 county-wide and 35.3 region-wide.
- Only 6% of Gwinnett Place residents are over 65, two-thirds of the regional average of 9%.
    - The Gwinnett Place CORE skews even younger, with a median age of 30, and only 3% of residents over 65 years.

Table A-3.9: Age Distribution, 2011

Age Distribution	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
Under 18	27%	32%	30%	30%	27%
18-24	8%	9%	8%	9%	9%
25-45	44%	30%	34%	29%	30%
45-65	18%	23%	22%	25%	26%
Over 65	3%	6%	6%	7%	9%
Median Age	30.9	31.9	32.3	33.6	35.3

Source: Claritas, Inc.

Education

Educational attainment in the LCI area is generally consistent with county-wide and regional trends, with almost 25% of study area residents are college graduates, compared to 22.5% for the Atlanta region.

Table A-3.10: Educational Attainment, 2011

2008 Est. Educational Attainment, Age 25+	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
No HS Diploma	13.8%	10.0%	11.7%	12.5%	13.0%
HS Diploma or GED	52.7%	51.4%	52.5%	52.9%	52.8%
4 Yr College Degree	22.8%	26.0%	24.9%	23.6%	22.5%
Advanced Degree	10.7%	12.7%	10.8%	11.0%	11.6%

Source: Claritas, Inc.

Household Income

- Household incomes in the study area tend to be lower than county and regional averages, with a median household income of $53,084 compared to $64,304 for Gwinnett County and $60,647 for the metro region. This is most likely attributable to the prevalence of smaller, younger households in the study area, particularly in the Gwinnett Place Core.
- The Gwinnett Place Core more lower-income households, while the Sugarloaf Core has more upper- income households:
  - In the Gwinnett Place Core 37% of households earn less than $35,000 and 20% are below the federal poverty level.
  - Fewer than 6% of Gwinnett Core households earn more than $100,000 annually, compared to 22% in the Sugarloaf Core.

Table A- 3.11: Households by Household Income and Median Household Income, 2011

2011 Est. Households by Household Income	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
Less than $15,000	7.4%	7.4%	6.0%	5.3%	9.0%
$15,000 - $24,999	12.1%	8.5%	8.6%	6.4%	7.8%
$25,000 - $34,999	17.4%	10.5%	12.2%	8.9%	9.3%
$35,000 - $49,999	24.4%	16.9%	20.2%	15.8%	14.9%
$50,000 - $74,999	22.6%	21.9%	25.0%	23.7%	21.1%
$75,000 - $99,999	10.4%	12.7%	13.7%	17.0%	14.1%
$100,000 - $149,999	4.5%	12.9%	9.9%	15.6%	14.2%
$150,000 and more	1.2%	9.3%	4.4%	7.3%	9.5%
Households earning less than $35K	36.8%	26.3%	26.7%	20.6%	26.1%
Households Earning More than $100K	5.7%	22.2%	14.4%	22.9%	23.8%
2011 Est. Median Household Income	$43,090	$57,729	$53,084	$64,304	$60,647
2011 Est. Per Capita Income	$20,786	$26,717	$23,533	$25,768	$28,777

Source: Claritas, Inc.

Table A-3.12: Households by Poverty Status, 2011

2011 Est. Families by Poverty Status	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
2011 Families at or Above Poverty	80%	87%	87%	91%	92%
2011 Families Below Poverty	20%	13%	13%	9%	8%

Source: Claritas, Inc.

Housing

Housing statistics underline the distinct character of the LCI study area as compared to the rest of the county and metro region. Within the LCI study area, the two individual Cores show significant differences as well.

- In the study area, 53% percent of homes are owner-occupied, compared to 73% county-wide and 69% region-wide.
    - Within the Gwinnett Place Core, only 14% of homes are owner-occupied, which contrasts significantly with 63% in the Sugarloaf Core.
- Multi-family housing accounts for 44% of all units in the study area, a significantly higher share than the 20% county-wide.
    - The Gwinnett Place CORE is dominated by multi-family housing developments, accounting for 83% of units vs. 34% in the Sugarloaf Core.

Table A-3.13: Housing Tenure, 2011

2011 Est. Tenure of Occupied Housing Units	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
Total Homes	3,170	4,976	29,426	270,188	2,005,649
Owner Occupied	14%	63%	53%	73%	69%
Renter Occupied	87%	37%	47%	27%	31%

- Source: Claritas, Inc.

Table A-3.14: Households Units by Unit Type Status, 2011

2011 Est. Housing Units by Units in Structure	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
SF Detached	403	3,263	15,726	208,998	1,469,753
Townhome	182	66	2,008	16,630	105,230
Small Multi-Family (2to 4 Units)	157	40	764	8,382	90,755
Medium Multi-Family (5 to 19 Units)	1,922	1,020	8,086	33,483	290,595
Large Multi-Family 20+ Units	853	778	4,701	15,110	150,286
Other	6	266	443	4,798	74,207
2011 Est. Housing Share by Units in Structure	**Gwinnett Place Core**	**Sugarloaf Core**	**LCI Study Area**	**Gwinnett County**	**Atlanta CSA**
SF Detached	11%	60%	50%	73%	67%
Townhome	5%	1%	6%	6%	5%
Small Multi-Family (2to 4 Units)	4%	1%	2%	3%	4%
Medium Multi-Family (5 to 19 Units)	55%	19%	25%	12%	13%
Large Multi-Family 20+ Units	24%	14%	15%	5%	7%
Other	0%	5%	1%	2%	3%

Source: Claritas, Inc.

Home Values are more modest in the LCI study area than in Gwinnett County as a whole.

- Homes valued at $200,000 or less account for 76% of all study area homes, compared to 66% county-wide.
- Values in the Gwinnett Place Core are even more modest, with 84% of housing units valued at $200,000 or less, compared to, 54% of units in the Sugarloaf Core.
- The Sugarloaf Area has a significant inventory of expensive homes, with 6% of homes valued over $750,000, compared to 2% region-wide and none in the Gwinnett Place Core.

Table A-3.15: Owner-Occupied Housing Values, 2011

2011 Est. All Owner-Occupied Housing Values	Gwinnett Place Core	Sugarloaf Core	LCI Study Area	Gwinnett County	Atlanta CSA
Total Homes	428	3,122	15,564	196,483	1,378,590
Less than $100K	7%	7%	7%	7%	15%
$100K to $200K	77%	47%	69%	59%	48%
$200K to $300K	14%	26%	16%	23%	19%
$300K to $500K	1%	12%	5%	9%	12%
$500K to $750K	0%	5%	2%	4%	7%
$7500K to $1M	0%	3%	1%	0%	1%
Over $1 million	0%	3%	1%	0%	1%

Source: Claritas, Inc.

C. Business & Employment Characteristics.

Employment patterns and trends in the local area workforce are essential indicators of economic growth and vitality in the LCI area. Not only do local businesses generate income and consume goods and services in the local economy, but their employees spend money that they have earned during the workday in the local area, generating revenue for and sustaining local businesses. This section focuses on the employment base and daytime workforce of the Gwinnett LCI study area.

Employment

- The LCI study area contains the largest concentration of employment in Gwinnett County. It is home to 3,399 firms employing over 50,000 people.
    - The Largest employment sectors in the Study Area, in terms of number of firms, are:
        - Services (1,238 Firms)
        - Retail Trade (779 Firms)
        - F.I.R.E. (446 Firms)
    - In terms of employment, the strongest employment sectors in the study area are:
        - Retail Trade (26% of all study area jobs)
        - Services (25%)
        - F.I.R.E. (15%)
- The study area economy is highly diversified, with significant numbers of firms and employees in a wide range of employment sectors.
- The study area is a major regional job center, with a jobs-to-housing ratio of 1.6 jobs per housing unit.
    - The jobs-to-housing balance is even more pronounced in the Gwinnett Place Core (4.2) and the Sugarloaf Core (2.8).
- One out of every six jobs Gwinnett County is located the LCI study area.

Table A-3.16: Study Area Est. Employment by Sector, 2011

Sector	Gwinnett Place Core Employees	Firms	Sugarloaf Core Employees	Employment by Sector	LCI Study Area Firms	Employees
Industrial Sector						
Agriculture	5	238	4	4	36	317
Mining	-	-	-	-	-	-
Construction	24	268	43	703	203	1,654
Manufacturing	24	792	50	1,669	155	4,956
Transp & Public Utilities (TPU)	44	226	27	1,960	122	5,927
Wholesale Trade	27	529	59	994	161	3,408
Retail Trade	315	6,549	164	2,876	779	13,132
Finance, Insurance and Real Estate (FIRE)	140	2,639	145	1,873	446	7,335
Services	374	3,174	342	4,893	1,238	12,655
Public Admin	11	72	1	1	16	106
Unclassified	82	309	74	338	243	883
Total	**1,046**	**14,796**	**909**	**15,311**	**3,399**	**50,373**

Source: Claritas, Inc.

Table A-3.17: Study Area Est. Employment Share by Sector, 2011

Sector	Gwinnett Place Core Employees	Firms	Sugarloaf Core Employees	Employment by Sector	LCI Study Area Firms	Employees
Agriculture	0%	2%	0%	0%	1%	1%
Mining	0%	0%	0%	0%	0%	0%
Construction	2%	2%	5%	5%	6%	3%
Manufacturing	2%	5%	6%	11%	5%	10%
Transp & Public Utilities (TPU)	4%	2%	3%	13%	4%	12%
Wholesale Trade	3%	4%	6%	6%	5%	7%
Retail Trade	30%	44%	18%	19%	23%	26%
Finance, Insurance and Real Estate (FIRE)	13%	18%	16%	12%	13%	15%
Services	36%	21%	38%	32%	36%	25%
Public Admin	1%	0%	0%	0%	0%	0%
Unclassified	8%	2%	8%	2%	7%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Claritas, Inc.

Table A-3.18: Study Area Jobs-Housing Balance, 2011

	Gwinnett Place Core	Sugarloaf Core	LCI Market Area	Gwinnett County
Housing Units	3,523	5,434	31,728	28,7401
Jobs	14,796	15,311	50,373	288,900
Jobs:Housing Ratio	4.20	2.82	1.59	1.01

Source: Claritas, Inc, BAG

Demographic & Housing Summary

Population Growth

- The LCI study area's population in 2010 was 81,348 up from 27,615 in 1990.
- The LCI area has experienced phenomenal growth in the 1990s. Population in the LCI study area increased at an overall rate of 8.1% annually in the 1990s, with the Sugarloaf Core expanding even more rapidly, at a rate of 10.6% rate annually.
- If the study area were incorporated, it would be the 9th largest city in Georgia, between Roswell and Albany.
- Population growth slowed dramatically from 2000 to 2010, growing at a 2.8% annual rate since 2000, slightly ahead of the region's 2.5% growth rate.
- Population in the area is projected to continue to increase at a steady 2.2% over the next five years, still exceeding county-wide, region-wide and State-wide growth. The study area population is projected to grow to 103,000 by 2020.
- There are approximately 29,500 households in the LCI study area, with 3,170 households in the Gwinnett Place Core and nearly 5,000 in the Sugarloaf Core. The remaining households are located in residential neighborhoods outside of the two COREs, at the edges of the study area.
- Roughly one-in-ten Gwinnett residents currently live in the LCI study area.

Transition

- Gwinnett County in general, and the LCI study area in particular, have seen aremarkable shift in racial and ethnic composition over the past ten years.
- In 2000, whites accounted for 55% of the study area's population. By 2010, Non-whites accounted for the majority of residents in the study area (65%), with 29% African-Americans, 18% Asians, and 18% other racial groups. In contrast, non-whites represent 46% of the population of Gwinnett County and 42% of the Atlanta region.
- Hispanics and Latinos have a substantial presence in the LCI study area, with 31% of the total population. Compared to 20% of the population of Gwinnett County and 10% of the Atlanta region.
- From 2000 to 2010, the overall population of the study area increased by 10,073. The white population in the area declined by 3,761 people while the non-white population increased by 13,834.

Household Characteristics

- Study area households are less likely to be married couples and more likely to be singles or other non-family households than is typical county-wide.
- Study area residents tend to be well educated and significantly younger, than county-wide residents.

Housing and Income

- Household incomes in the study area tend to be lower than county and regional averages, with a median household income of $53,084 compared to $64,304 for Gwinnett County and $60,647 for the metro region. This is most likely attributable to the prevalence of smaller, younger households in the study area, particularly in the Gwinnett Place Core.
- The Gwinnett Place Core more lower-income households, while the Sugarloaf Core has more upper- income households.
- In the study area, 53% percent of homes are owner-occupied, compared to 73% county-wide and 69% region-wide.
- Multi-family housing accounts for 44% of all units in the study area, a significantly higher share than the 20% county-wide.
- Home values are more modest in the LCI study area than in Gwinnett County as a whole.

Employment

- The LCI study area contains the largest concentration of employment in Gwinnett County. It is home to 3,399 firms employing over 50,000 people.
- The study area economy is highly diversified, with significant numbers of firms and employees in a wide range of employment sectors.
- The study area s a major regional job center, with a jobs-to-housing ratio of 1.6 jobs per housing unit.

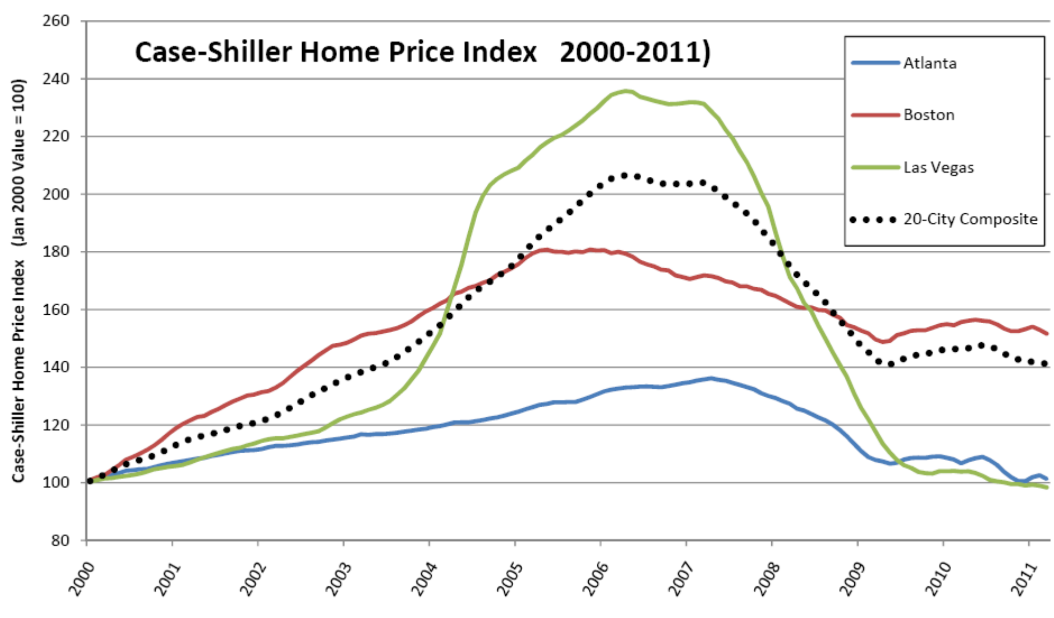
D. Real Estate Market Trends

In this section the performance of the Gwinnett LCI study area real estate market is examined in terms of several key land uses: residential, retail, office, and industrial. The purpose of this section is to present an overview of the study area's real estate market to serve as the basis of project growth and redevelopment potential in order to inform future transportation and land use decisions within the study area.

National Residential Trends

The Atlanta housing market, while volatile, has been less volatile than other metropolitan markets in the United States. Despite the severity of the current recession, the local residential real estate market experienced less of a speculative bubble and less of a crash than other cities. While this tempered the potential for financial losses, it also limited opportunities for gain. The Atlanta metro area had virtually no home value growth over last decade, compared to 40% average growth rate average for major metro areas.

Figure A-3.5: Case Shiller Home Price Index, 2000-2011



Source: Standard & Poor/Case-Shiller Index

Home Sales: Gwinnett County

- New home sales volumes and prices have declined significantly in Gwinnett County due to the impact and lingering effects of the Great Recession.

  - New home sales volumes have declined 87% from a high of 9,390 in 2005 to 1,256 in 2010.
- Townhomes represented 24% of Gwinnett's new home market in 2006, and that share has since declined to 16%, with only 204 new townhomes sold in 2010, a decline of 89% since 2006.
- While sales volumes for new homes in the LCI area fell sharply, an average of 89% off of peak volumes, sales of existing homes declined 34% from peak levels.
- Average new home prices in Gwinnett County peaked in 2007, at $296,334, and have since declined to $239,900, a decrease of 19%.
  - Average new single family home prices peaked in 2007, at $329,745, and have since declined to $255,675, a decrease of 22%.
  - Average new townhome prices peaked in 2007, at $194,373, and have since declined to $158,349, a decrease of 19%.
  - The condominium market declined to zero after 2008.
- The dramatic decline in home sales volume and price has occurred across the board as a result of the Great Recession.

Table A-3.19: New Home Sales History by Home Type Gwinnett County, 2004-2010

	All New Home Sales Gwinnett County	2005	2006	2007	2008	2009	2010
All New Homes	# of Units	9,390	8,276	5,038	2,857	1,832	1,256
	Avg. Sales Price	$259,002	$276,852	$296,334	$290,843	$247,680	239,900
New SF Homes	# of Units	7,396	6,210	3,797	2,179	1,480	1,158
	Avg. Sales Price	$281,226	$305,964	$329,745	$321,979	$266,403	$255,675
New Townhomes	# of Units	1,987	2,016	1,183	672	352	204
	Avg. Sales Price	$176,627	$191,019	$194,373	$190,867	$168,956	$158,349
New Condos	**# of Units**	7	50	58	6	-	-
	Avg. Sales Price	$160,694	$122,022	$188,700	$180,950	$-	$-

Source: SmartNumbers, Inc.

Table A-3.20: New Vs. Existing Home Sale, Gwinnett County, 2004-2010

Home sales in all of Gwinnett County	2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	8,752	9,373	8,285	5,046	2,866	1,836	1,256	-87%
Resale Units Sold	11,177	13,021	13,377	10,189	7,777	8,730	8,762	-34%
Total Units Sold	**19,929**	**22,394**	**21,662**	**15,235**	**10,643**	**10,566**	**10,018**	**-55%**
Median New Price	$197,000	$215,755	$235,000	$245,000	$234,900	$205,113	$205,000	-16%
Median Resale Price	$161,000	$169,000	$174,900	$175,000	$160,000	$134,000	$125,000	-29%
Median Total Price	**$175,700**	**$187,900**	**$199,000**	**$196,011**	**$178,000**	**$147,000**	**$135,000**	**-32%**

Source: SmartNumbers, Inc.

Home Sales: LCI Study Area

- As in the County, home sales volumes and prices in the study area have declined significantly since the market peak in 2007.
    - New home sales volumes have declined 89% from a high of 2,320 units in 2005 to 261 units in 2010.
    - Existing home sales volumes have declined 34% from a high of 4,053 units in 2005 to 2,634 units in 2010.
    - In 2004, there were nearly 2 existing home sales for each new home sale in the study area. Resale homes now dominate the market. By 2010, that share had increased steadily, so by 2010 there were 10 resales for each new sale, indicating a broad drop in new home sales relative to the broader market.
- Median home prices peaked in 2007, at $196,000, and have since declined to $137,000, a decrease of 30% in three years.
    - Median new home prices peaked in 2007, at $248,000, and have since declined to $228,900, a decrease of 8%.
    - Median resale home prices peaked in 2007, at $181,000, and have since declined to $127,900, a decrease of 30%.
- Median home prices in the study generally reflected pricing trends in the County.

Table A- 3.21: New Vs. Existing Home Sale, LCI Area, 2004-2010

Composite of all 4 LCI-Area ZIP Codes	2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	1,915	2,320	1,965	995	545	334	261	-89%
Resale Units Sold	3,613	4,105	4,053	3,168	2,355	2,519	2,634	-36%
Total Units Sold	**5,528**	**6,425**	**6,018**	**4,163**	**2,900**	**2,853**	**2,895**	**-55%**
Ratio of Resales: New	**1.89**	**1.77**	**2.06**	**3.18**	**4.32**	**7.54**	**10.09**	
Median New Price*	$217,786	$200,439	$218,867	$248,286	$243,600	$226,309	$228,065	-8%
Median Resale Price*	$167,131	$176,991	$180,110	$181,253	$165,644	$132,810	$126,961	-30%
Median Total Price*	$176,014	$181,438	$190,491	$196,012	$180,668	$145,672	$137,001	-30%

Source: SmartNumbers, Inc. * Median of compiled ZIPs is mean of component area medians.

Figure A-3.6: New Home Sales Average Price 2004-2010

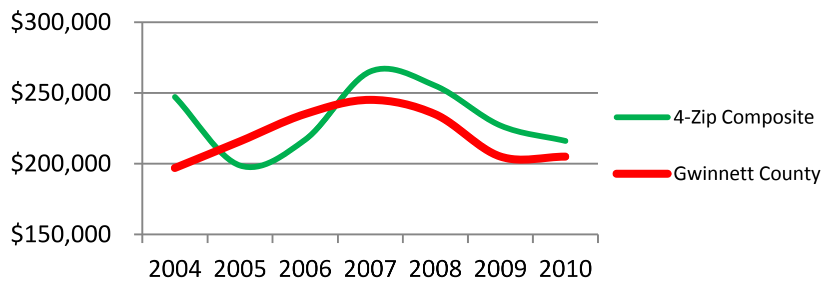


Figure A-3.7: Existing Home Sales Average Price 2004-2010

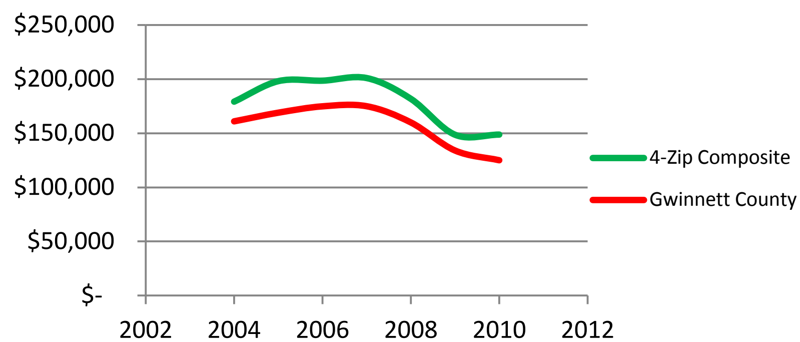
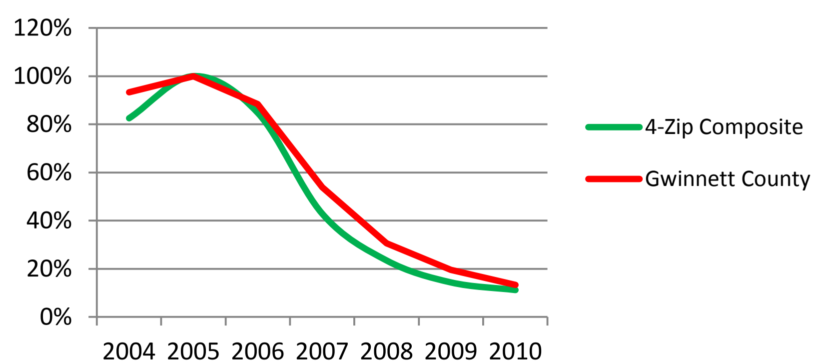


Figure A-3.8: New Home Sales Volume Relative to Peak Year 2004-2010



Source: SmartNumbers, Inc.

Foreclosure Trends

Gwinnett County currently has an estimated 7,488 homes in foreclosure, or 2.6% of its total housing inventory. This rate is comparable to other CORE counties in the Atlanta metro region but higher than the statewide average of 1.9% or the national average of 1.2%. The study area (based on 4 ZIP Codes) has a reported 2,463 homes, or 2.7%, currently in foreclosure.

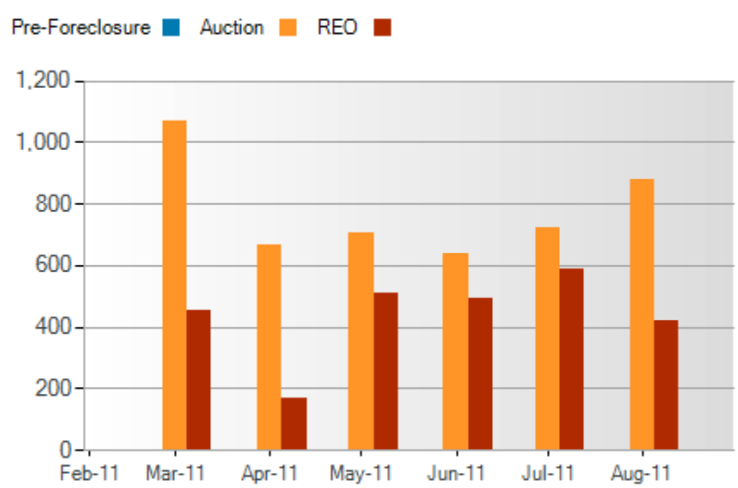
Since February 2001, the average number of foreclosure filings has ranged between 620 and 1,050 per month, with the peak occurring in March of 2011.

Table A-3.22: Foreclosures vs. Total Housing Units, Gwinnett & Neighboring Counties

Area	Homes in Foreclosure (September 2011)	Total Housing Units 2010	%
Study Area	**2,463**	**92,061**	**2.7%**
Gwinnett County	**7,488**	**291,547**	**2.6%**
Barrow County	876	26,400	3.3%
Cherokee	2002	82360	2.4%
Clayton County	2,826	104,705	2.7%
Cobb County	7,806	286,490	2.7%
DeKalb County	7,069	304,968	2.3%
Fulton County,	10,378	437,105	2.4%
Hall County	1,506	68,825	2.2%
Henry County	2,298	76,533	3.0%
Georgia	77,382	4,088,801	1.9%
United States	1.56 mil	131.7 Mil	1.2%

Source: RealtyTrac, US Census, BAG.

Figure A-3.9: Gwinnett County Foreclosures Filings by Month, last six months



Source: RealtyTrac

Apartments

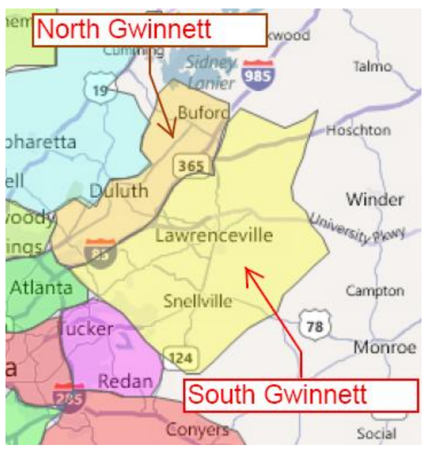
The LCI study areas apartment s are a substantial component of the housing inventory: The study area contains 13,994 multi-family housing units, most in structures of 5 or more units.

Apartment Trends in Gwinnett County

Apartment trend, vacancy and rent data for Gwinnett County was obtained from Reis Reports, Inc, a national real estate data source. Reis divides Gwinnett County into two submarkets:

- North Gwinnett: All portions of County North of Interstate 85 /Interstate 985
- South Gwinnett: All portions of County South of Interstate 85 /Interstate 985
- The LCI study area straddles the two submarkets.

Figure A-3.10: Gwinnett Apartment Submarket Map



Source: Reis Reports, Inc.

- Rents in Gwinnett are generally lower than the broader Atlanta rental market.
  - Median one-bedroom apartment rents average between $677 and $737 in the two Gwinnett submarkets, versus $754 in the Atlanta region.
  - Median two-bedroom apartment rents range from $815 to $894 in Gwinnett County, versus $880 in the Atlanta region.
- The median vacancy rate 7.8% in the North Gwinnett submarket, and 6.2 % in the South Gwinnett submarket compared to an average of 8.7% for the Atlanta Region. Average rates in both the Atlanta region and both Gwinnett submarkets have declined between 2.5 to 3 percentage points over the past 12 months, reflecting a strong rental market.

Table A-3.23: Average Apartment Rents, North & South Gwinnett Submarkets & Atlanta Region

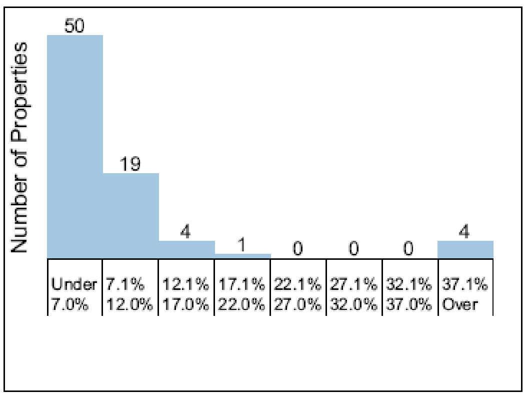
Submarket		Studio	1BR	2 BR	3BR
North Gwinnett	**Per Unit Avg.**	$551	$737	$894	$1052
	Per SF Avg	$1.26	$0.94	$0.78	$0.75
South Gwinnett	**Per Unit Avg.**	$526	$677	$815	1,036
	Per SF Avg	$1.00	$0.88	$0.73	$0.75
Atlanta Metro Avg.	**Per Unit Avg.**	$649	$754	$880	$1.053
	Per SF Avg	$1.22	$0.95	&0.78	&0.75

Source: Reis Reports, Inc. Effective Second Quarter 2011.

Figure A-3.11: Vacancy Rate Distribution & Vacancy Rate Trends Last Four Quarters

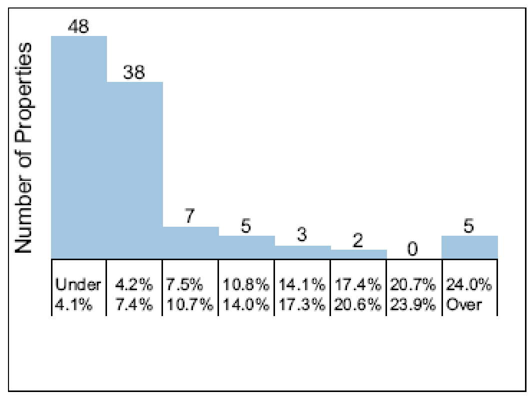
North Gwinnett Submarket

Low	25%	Mean	Median	75%	High
2.0%	3.6%	7.8%	5.0%	7.4%	49.2%



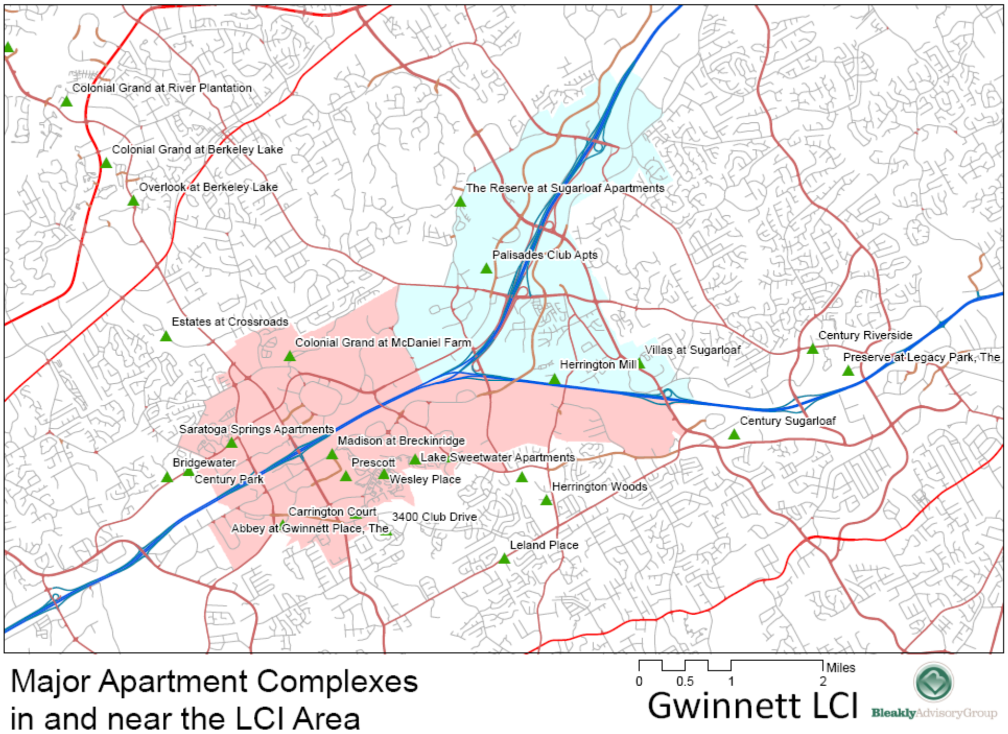
South Gwinnett Submarket

Low	25%	Mean	Median	75%	High
0.8%	2.7%	6.2%	4.8%	7.3%	27.5%



Source: Reis Reports, Inc. Current as of Q2, 2011

Figure A-3.12: Major Apartment Complexes in and Near the LCI Area



Source: BAG.

Table A-3.24: List of Apartments in or near Study Area

Major Apartment Complexes in the Gwinnett LCI Study Area		
Name	**Street**	**Rent Range**
3400 Club Drive	3400 Club Lakes Parkway	$125 - $1,200
Abbey at Gwinnett Place, The	3525 Club Drive	$619 - $959
Bridgewater	1500 Ridge Brook Trail	$696 - $1,205
Carrington Court	3800 Club Drive	From $550
Century Park	2110 Preston Park Dr.	$695 - $1,235
Century Sugarloaf	1595 Old Norcross Road	$720 - $1,380
Charleston at Sweetwater, The	2906 Old Norcross Rd.	$635 - $900
Colonial Grand at McDaniel Farm	3355 McDaniel Road	$725 - $1,385
Herrington Mill	1564 Herrington Road	$625 - $875
Lake Sweetwater Apartments	3100 Sweetwater Rd	$535 - $899
Madison at Breckinridge	3450 Breckinridge Boulevard	$569 - $885
Palisades Club Apts	2255 Satellite Blvd.	$539 - $971
Prescott	1655 Centerview Drive	$620 - $1,295
Saratoga Springs Apartments	4201 Pleasant Lake Village Lane	$414 - $1,070
The Reserve at Sugarloaf Apartments	2605 Meadow Church Road	$722 - $762
Villas at Sugarloaf	4975 Sugarloaf Pkwy.	$775 - $1,419
Wesley Place	Wesley Place 3250 Sweetwater Road	$503 - $1,075

Source: Apartment Finder.com.

E. Commercial Real Estate

The LCI area's commercial real estate market is substantial and dispersed throughout the study area, and is currently reflecting the impacts of the Great Recession.

Detailed real estate Inventory data was obtained from CoStar, Inc. for the areas defined by the LCI study boundaries.

- The LCI area contains over 33 million SF of commercial real estate in 664 buildings, Including:
  - 10.2 million SF of retail space, currently 6.7% vacant,
  - 18.8 million SF of industrial space, currently 13.6% vacant.
  - 7.0 million SF of office space, currently 15.3% vacant

Retail Real Estate

The study area is a super-regional retail center with over 10 million SF of retail space, with 7.7 million SF in the Gwinnett Place Core and 2.5 million SF in the Sugarloaf Core.

- Net absorption has been positive in the study area through 2011, with 70,000 SF absorbed
- The study area contains two super-regional malls: Gwinnett Place Mall and Discover Mills, with a combined 2.5 million SF of space.
- The study area contains many national discount retailers, including Target, Wal-Mart, Best Buy, Fry's and the region's only Bass Pro Shop.
- It has 24 shopping centers of 50,000 SF or more, representing a total of 4.8 million SF.
- It is home to a growing retail industry serving the area's expanding Asian and Hispanic populations, with malls such as the Santa Fe Mall and Mega Mart, as well as numerous stores and restaurants.
- The Gwinnett Place Core has one of the region's largest concentrations of auto dealerships.
- In addition, there is large number of free-standing restaurants and retail outlets in the study area The entire area enjoys excellent regional access and visibility from Interstate 85, one of the nation's busiest interstates, with average daily traffic exceeding 235,000 vehicles. The study area is also contains the termination point of GA 316, which connects the Atlanta metro region to Athens and the University of Georgia.

Table A-3.25: Retail Inventory

Inventory Characteristics	Gwinnett Place Core	Sugarloaf Core	Total LCI Area
Total Inventory (SF)	7,749,830	2,511,430	10,261,260
Buildings	238	93	331
Average Age of Bldg	19	10	16
Vacancy Rate (2011 Q2)	7.5%	4.2%	6.7%
Vacant (SF)	583,896	105,963	689,859
Available (SF)	583,896	105,963	689,859
Net Absorption 2011	23,673	46,384	70,057
Average Rent: (Triple Net)	$15.11	$17.32	$15.65
Rent Range	$8.00-$32.30	$13.00-$24.00	$8.00-$32.30

Source: CoStar, Inc.

Retail Sales and Potential

The study area is one of the Atlanta region's major retail locations with over 10 million SF of retail space across a wide spectrum of retail segments. As a result it generates a great deal of the retail activity in Gwinnett County.

- In 2011 retail outlets in the study area generated $2.4 billion in annually retail sales
- Retail demand from households in the study area is estimated to be $1.1 billion annually.
- Thus, the study area is attracting substantial additional retail sales activity from other parts of Gwinnett and the Atlanta region to shop in the area.
- The top five retail sales categories in the study area are:
    - Motor vehicle dealers
    - General merchandise stores
    - Food and beverage stores
    - Food service and drinking places
    - Gasoline stations.
- If the study area attracts an additional 15,000 households over the next decade it would increase the retail potential in the area by $514 million dollars.

The retail sales generated in the study area has a major impact on sales tax revenues—the $2.4 billion in annual retail sales generates approximately $135 million in sales tax revenue for the State, Gwinnett County and the Gwinnett County Schools.

Table A-3.26: Study Area 2011 Retail Potential vs. Sales (in millions of 2011 dollars)

Retail Stores	Gwinnett Place Core Residential Retail Potential	Gwinnett Place Core Retail Sales	Sugarloaf Core (1.5 Mi) Residential Retail Potential	Sugarloaf Core (1.5 Mi) Retail Sales	LCI Study Area Residential Retail Potential	LCI Study Area Retail Sales
Motor Vehicle and Parts Dealers-441	$15.75	$212.12	$36.19	$84.63	$188.43	$1,165.00
Furniture and Home Furnishings Stores-442	$1.62	$4.45	$4.23	$2.80	$21.25	$20.94
Electronics and Appliance Stores-443	$2.15	$10.98	$4.61	$15.97	$24.60	$97.80
Building Material, Garden Equip Stores -444	$6.66	$29.43	$18.02	$24.47	$92.35	$115.52
Food and Beverage Stores-445	$12.83	$10.02	$26.05	$34.58	$143.16	$185.60
Health and Personal Care Stores-446	$5.28	$15.49	$11.35	$16.86	$62.59	$95.13
Gasoline Stations-447	$10.77	$21.32	$19.55	$6.49	$111.08	$134.74
Clothing and Clothing Accessories Stores-448	$5.03	$17.01	$10.86	$20.20	$57.06	$125.42
Sporting Goods, Hobby, Book, Music Stores-451	$1.81	$4.84	$4.20	$10.67	$21.71	$40.91
General Merchandise Stores-452	$13.10	$50.13	$27.90	$13.23	$150.07	$229.31
Miscellaneous Store Retailers-453	$2.32	$2.81	$5.10	$6.52	$27.28	$26.79
Non-Store Retailers-454	$7.14	$1.27	$15.54	$16.13	$83.18	$33.64
Foodservice and Drinking Places-722	$11.70	$25.94	$22.37	$25.73	$123.69	$158.93
Total	**$96.17**	**$405.82**	**$205.98**	**$278.28**	**$1,106.46**	**$2,429.71**
Ratio of Sales to Potential		**4.22**		1.35		**2.20**

Source: Claritas, Inc.

Table A- 3.27: Study Area Top-5 Categories for Retail Sales

Top 5 Categories for Retail Sales	LCI Study Area (3 Mi)	Share of Sales	Total Sales (Mil $)
1	Motor Vehicle and Parts Dealers-441	48%	$1,165.00
2	General Merchandise Stores-452	9%	$229.31
3	Food and Beverage Stores-445	8%	$185.60
4	Foodservice and Drinking Places-722	7%	$158.93
5	Gasoline Stations-447	6%	$134.74

Source: Claritas, Inc.

Table A-3.28: Study Area Sales Tax Revenue Estimates (in millions of dollars)

Sales Tax Revenue Estimates	Gwinnett Place Core	Sugarloaf Core (1.5 Mi)	LCI Study Area (3 Mi)
Gross Annual Sales	$405.82	$278.28	$2,429.71
Less Not Taxable Sales (Groceries)	$(16.99)	$(39.08)	$(221.54)
Taxable Sales	$388.83	$239.20	$2,208.18
Less Admin	$7.78	$4.78	$44.16
Net Taxable Sales	$396.61	$243.98	$2,252.34
State Revenue (4%)	$15.86	$9.76	$90.09
County Revenue (2%)	$7.93	$4.88	$45.05
Net Sales Tax Revenue	**$23.80**	**$14.64**	**$135.14**

Source: Claritas, Inc, Georgia Dept. of Revenue, BAG

Industrial Real Estate

The study area contains a major concentration of industrial development with 15.7 million SF of industrial space, divided evenly between the two tiers.

- The industrial vacancy is estimated to be 13.5 %, with 2.1 million SF of space available.
- Absorption through 2011 has been negative, with 1% (-147,000) of the area's total inventory going back on the market.
- Average triple-net rents for industrial space range from$ 4.73 to $5.66
- The study area has62 buildings of over 100,000 SF, with 28 in the Gwinnett Place Core and 34 in the Sugarloaf Core.

Table A-3.29: Industrial Inventory

Industrial	Gwinnett Place Core	Sugarloaf Core	Total LCI Area
Total Inventory (SF)	7,389,776	8,402,638	15,792,414
Buildings	84	67	151
Average Age of Bldg	16.7	15.4	16.1
Vacancy Rate (2011 Q2)	13.6%	13.5%	13.6%
Vacant (SF)	1,008,527	1,135,463	2,143,990
Available (SF)	1,008,527	1,135,463	2,143,990
Net Absorption 2011	-78,092	-69,140	-147,232
Average Rent: (Triple Net)	$ 5.66	$ 4.73	$ 5.17
Rent Range	$3.50-$10.50	$2.95-$10.00	$2.95-$10.00

Source: CoStar, Inc.

Major industrial park facilities in the study area include:

- Northwest Distribution Center
- Breckenridge
- Gwinnett Corporate Center
- New Point Place

Office Real Estate

The study area has a substantial inventory of office space.There are approximately 7 million SF of space in the study area across 182 buildings.

- There are 28 Class A buildings, with 3.5 million SF of space
    - 2.5 million SF of office space is in the Gwinnett Place Core , averaging 81% occupancy;
    - 1 million of office space SF is in the Sugarloaf Core, averaging 75% occupancy.
- There are 81 Class B buildings, with 3.1 million SF of office space in the study area, averaging 83% vacancy in the Gwinnett Place Core and 92% in the sugarloaf core.
- There are 32 Class C buildings, with 560,000 SF of space, with a reported occupancy of 96%.
- The study area has 1.1 million SF vacant office space.
- Rents for Class-A office space range from $18.00 to $21.00 in the Gwinnett Place Core and $20.00 to $22.00 in the Sugarloaf Core.
- The study area's office sector experienced a modest increase in occupancy through 2011, with absorption of 15,502 SF (0.2%).
- Major office employers in the study area include :
    - Primerica Financial Services (Insurance), 1,600 employees
    - NCR Corp Global HQ, (ATMs & Other Self-Service Terminal), 1,400 employees
    - Nextel South Corp (Telecommunications Services), 1,400 employees
    - Assurant Specialty (Property Property & Casualty Insurance), 1,175 employees
    - Merial LLC (Biopharmaceuticals & Biotherapeutics), 600 employees

The study area office market is highly dispersed through the area, and generally lacks a strong identity or focus within the market. The majority of buildings are not prominently visible from the interstates or major arterials within the study area..

Table A- 3.30: Office Inventory

Office	Gwinnett Place Core	Sugarloaf Core	Total LCI Area
Total Inventory (SF)	4,434,596	2,751,728	7,186,324
Buildings	100	82	182
Average Age of Bldg	19	11	15
Vacancy Rate (2011 Q1)	18.0%	11.0%	15.3%
Vacant (SF)	796,455	301,380	1,097,835
Available (SF)	796,455	301,380	1,097,835
Net Absorption 2010	-41,081	56,883	15,802
Average Rent: (Triple Net)	$19.32	$20.66	$19.83
Rent Range :	$12.00-$21.50	$16.00-$25.00	$12.00-$25.00

Source: CoStar, Inc.

Table A-3.31: Study Area Office Inventory By tier & Bldg Class

Core	No. of Bldgs	Building Class	Avg Year Built	Avg Stories	Avg. RBA (SF)	% Leased	Average Weighted Rent
Gwinnett Place	17	A	1996	5.2	2,543,482	81%	$18.88
	54	B	2003	1.4	1,347,911	83%	$13.06
	29	C	1982	1.4	543,203	96%	NA
Sugarloaf	9	A	2002	4.1	1,073,962	75%	$21.38
	27	B	2002	1.6	809,752	92%	$14.21
	3	C	1994	2.0	21,100	100%	NA

Source: CoStar, Inc, BAG.

F. Real Estate Market Summary

Residential Real Estate

Home Sales

- New home sales volumes and prices have declined significantly in Gwinnett County due to the lingering effects of the Great Recession.
- Townhomes represented 24% of Gwinnett's new home market in 2006, and that share has since declined to 16%, with only 204 new townhomes sold in 2010, a decline of 89% since 2006.
- As in the County, home sales volumes and prices in the study area have declined significantly since the market peak in 2007.

- Median home prices peaked in 2007, at $196,000, and have since declined to $137,000, a decrease of 30% in three years.
- Gwinnett County currently has an estimated 7,488 homes in foreclosure, or 2.6% of its total housing inventory. This rate is comparable to other CORE counties in the Atlanta metro region but higher than the statewide average of 1.9% or the national average of 1.2%. The study area has a reported 2,463 homes, or 2.7%, currently in foreclosure.

Apartments

- The LCI study area's apartments are a substantial component of the housing inventory. The study area contains 13,994 multi-family housing units, most in structures of 5 or more units.
- Rents in Gwinnett are generally lower than the broader Atlanta rental market.
- The median vacancy rate 7.8% in the North Gwinnett submarket, and 6.2 % in the South Gwinnett submarket compared to an average of 8.7% for the Atlanta Region. Average vacancy rates in both the Atlanta region and both Gwinnett submarkets have declined between 2.5 to 3 percentage points over the past 12 months, reflecting a strong rental market.

Commercial Real Estate

- The LCI area contains over 33 million SF of commercial real estate in 664 buildings, Including:
  - 10.2 million SF of retail space, currently 6.7% vacant,
  - 18.8 million SF of industrial space, currently 13.6% vacant.
  - 7.0 million SF of office space, currently 15.3% vacant

Retail

- The study area is a super-regional retail center with over 10 million SF of retail space, with 7.7 million SF in the Gwinnett Place Core and 2.5 million SF in the Sugarloaf Core.
- The study area contains two super-regional malls: Gwinnett Place Mall and Discover Mills, with a combined 2.5 million SF of space.
- It contains many national discount retailers, including Target, Wal-Mart, Best Buy, Fry's and the region's only Bass Pro Shop.
- It has 24 shopping centers of 50,000 SF or more, representing a total of 4.8 million SF.
- It is home to a growing retail industry serving the area's growing Asian and Latino populations, with malls such as the Santa Fe Mall and Mega Mart, as well as numerous stores and restaurants.
- In 2011 retail outlets in the study area generated $2.4 billion in annually retail sales.
- Retail demand from households in the study area is estimated to be $1.1 billion annually.
- The retail sales generated in the study area has a major impact on sales tax revenues—the $2.4 billion in annual retail sales generates approximately $135 million in sales tax revenue for the State, Gwinnett County and the Gwinnett County Schools.

Industrial

- The study area contains a major concentration of industrial development with 15.7 million SF of industrial space, divided evenly between the two tiers.
- The industrial vacancy is estimated to be 13.5 %, with 2.1 million SF of available space.
- The study area has62 buildings of over 100,000 SF, with 28 in the Gwinnett Place Core and 34 in the Sugarloaf Core.

Office

- The study area has a substantial inventory of office space.
- There is approximately 7 million SF of space in the study area across 182 buildings.
- There are 28 Class A buildings, with 3.5 million SF of space
    - 2.5 million SF of office space is in the Gwinnett Place Core , averaging an 81% occupancy;
    - 1 million of office space SF is in the Sugarloaf Core, averaging a 75% occupancy.
- There are 81 Class B buildings, with 3.1 million SF of office space in the study area, averaging 83% vacancy in the Gwinnett Place Core and 92% in the sugarloaf core.
- There are 32 Class C buildings, with 560,000 SF of space, with a reported occupancy of 96%.
- The study area has 1.1 million SF vacant office space.

Additional Appendix Tables:

Table A-3-32: Study Area Top Employers (by Number of Employees)

Top Employers by Number of Employees

Primary Tier of Study Area

Rank	Employment Sector	Firms	Employees
1	Insurance Agents, Brokers and Service (64)	33	1,959
2	Eating and Drinking Places (58)	86	1,863
3	Automobile Dealers and Gas Service Stations (55)	33	1,344
4	Miscellaneous Retail (59)	71	1,024
5	Eng, Acct, Research and Mgmt Related Services (87)	55	701
6	General Merchandise Stores (53)	8	669
7	Business Services (73)	58	602
8	Home Furniture,Furnishings and Equipment (57)	32	543
9	Hotels and Other Lodging Places (70)	16	504
10	Apparel and Accessory Stores (56)	59	500

Secondary Tier of Study Area

Rank	Employment Sector	Firms	Employees
1	Business Services (602)	62	2,734
2	U.S. Postal Service (11)	2	1,704
3	Home Furniture,Furnishings and Equipment (543)	31	1,054
4	Insurance Agents, Brokers and Service (1959)	38	843
5	Industry and Commercial Machinery and Computers (40)	11	827
6	Wholesale Trade-Durable Goods (493)	53	728
7	Eating and Drinking Places (1863)	32	646
8	Construction-Special Trade Contractors (33)	26	593
9	Real Estate (266)	44	552
10	Eng, Acct, Research and Mgmt Related Services (701)	52	539

Total LCI Study Area

Rank	Employment Sector	Firms	Employees
1	Insurance Agents, Brokers and Service (843)	108	4,371
2	Business Services (2734)	226	4,086
3	Communication (106)	39	3,722
4	Eating and Drinking Places (646)	218	3,713
5	Wholesale Trade-Durable Goods (728)	138	2,860
6	Eng, Acct, Research and Mgmt Related Services (539)	171	2,321
7	Home Furniture,Furnishings and Equipment (1054)	100	2,300
8	Automobile Dealers and Gas Service Stations (180)	75	1,816
9	Miscellaneous Retail (386)	179	1,736
10	U.S. Postal Service (1704)	5	1,717

Source: Claritas, Inc.

Table A-3.33: Home Sales History, ZIP Code 30043, 2004-2010

Home sales in ZIP Code	Dacula, Discover Mills, To East						
30043	2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	625	819	688	362	182	143	64	-92%
Resale Units Sold	1,280	1,391	1,349	1,054	780	782	876	-37%
Total Units Sold	**1,905**	**2,210**	**2,037**	**1,416**	**962**	**925**	**940**	**-57%**
Median New Price	$184,000	$215,900	$234,087	$232,256	$220,416	$200,000	$185,250	-21%
Median Resale Price	$170,050	$179,900	$185,000	$185,700	$169,900	$140,000	$130,000	-30%
Median Total Price	**$174,900**	**$189,000**	**$198,000**	**$199,850**	**$179,078**	**$150,500**	**$135,000**	**-32%**

Source: SmartNumbers, Inc.

Table A-3.34: Home Sales History, ZIP Code 30044, 2004-2010

Home sales in ZIP Code	South of Study Area/East Lilburn/West Lawrenceville							
30044	2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	616	576	596	333	195	95	76	-88%
Resale Units Sold	1,284	1,496	1,450	1,137	812	966	974	-35%
Total Units Sold	**1,900**	**2,072**	**2,046**	**1,470**	**1,007**	**1,061**	**1,050**	**-49%**
Median New Price	$207,650	$181,884	$185,070	$183,000	$203,490	$195,000	$179,950	-13%
Median Resale Price	$150,000	$153,696	$157,750	$157,900	$137,474	$99,950	$90,000	-43%
Median Total Price	**$157,000**	**$158,000**	**$163,200**	**$160,000**	**$143,500**	**$105,000**	**$95,000**	**-42%**

Source: SmartNumbers, Inc.

Table A-3.35: Home Sales History, ZIP Code 30096, 2004-2010

Home sales in ZIP Code	Gwinnett Place/Pleasant Hill, W Duluth							
30096	2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	459	472	288	95	66	26	15	-97%
Resale Units Sold	754	883	918	726	521	501	505	-45%
Total Units Sold	**1,213**	**1,355**	**1,206**	**821**	**587**	**527**	**520**	**-62%**
Median New Price	$187,500	$185,398	$167,800	$275,565	$219,500	$169,450	$208,000	-25%
Median Resale Price	$166,750	$169,000	$171,700	$175,500	$159,000	$142,000	$125,000	-29%
Median Total Price	**$171,900**	**$173,000**	**$170,000**	**$179,450**	**$165,000**	**$145,000**	**$126,955**	**-29%**

Source: SmartNumbers, Inc.

Table A-3.36: Home Sales History, ZIP Code 30097, 2004-2010

Home sales in ZIP Code 30097	Sugarloaf 2004	2005	2006	2007	2008	2009	2010	Peak to 2010 Change
New Units Sold	215	453	393	205	102	70	106	-77%
Resale Units Sold	295	335	336	251	242	270	279	-17%
Total Units Sold	510	788	729	456	344	340	385	-51%
Median New Price	$409,700	$211,752	$280,900	$370,000	$377,240	$343,665	$291,253	-29%
Median Resale Price	$230,000	$290,000	$279,950	$285,000	$260,750	$212,500	$250,000	-14%
Median Total Price	**$260,800**	**$236,372**	**$280,000**	**$330,006**	**$320,650**	**$260,500**	**$270,000**	**-18%**

Source: SmartNumbers, Inc.

Table A-3.37: Major Retail Centers (>75,000 SF), Study Area Gwinnett Place Core

Center Name	Address	Year Built	Rentable Building Area	Average Weighted Rent	Percent Leased	% Leased	Leased SF	Anchor Tenants
Gwinnett Place Mall	2100 Pleasant Hill Rd	1984	1,227,830		95.68	96%	1,174,788	Belk, JCPenney, Macy's, Sears
Gwinnett Prado Shopping Center	2300 Pleasant Hill Rd	1988	322,991	-	100	100%	322,991	OfficeMax, Rooms to Go
Mall Corners Shopping Center	2131 Pleasant Hill Rd	1985	304,260		84.5	85%	257,100	hhgregg, Tuesday Morning
Promenade At Pleasant Hill	1625 Pleasant Hill Rd	1993	228,752		95.17	95%	217,703	Old Time Pottery, Publix
Pleasant Hill Plaza	1630 Pleasant Hill Rd	1994	219,025	$ 18.50	91.15	91%	199,641	Dollar Tree
Gwinnett Market Fair	3675 Satellite Blvd	1987	194,090	$ 16.50	89.46	89%	173,633	Bed Bath & Beyond Inc, Marshalls, Rugged Wearhouse
Plaza Santa Fe	3750 Venture Dr	1985	175,000	$ 13.00	100	100%	175,000	
Pleasant Hill Square	2205-2275 Pleasant Hill Rd	1997	173,273		80.91	81%	140,195	Barnes & Noble Booksellers, JCPenney Home Furnishings Store, JoAnn, Old Navy, Staples, Toys"R"Us
Super Target	3935 Venture Dr	1996	157,857	-	100	100%	157,857	Target
	4000 Venture Dr	1999	156,263	-	100	100%	156,263	
Venture Pointe - Costco Price Club	3980 Venture Dr	1996	139,000	-	100	100%	139,000	
Gwinnett Home Depot	3755 Shackleford Rd	1985	135,000	-	100	100%	135,000	
Pleasant Hill Point Shopping Center	1455 Pleasant Hill Rd	1991	133,690	-	100	100%	133,690	
Pleasant Hill Point	1455 Pleasant Hill Rd	1988	133,176	$ 13.51	69.37	69%	92,384	
Fry's Electronics	3296 Commerce Ave	2004	130,442	-	100	100%	130,442	
Market Place at Pleasant Hill	1500 Pleasant Hill Rd	1990	109,114	$ 15.57	85.57	86%	93,369	Dollar General
Reynolds Crossing	3780 Old Norcross Rd	2005	107,400	$ 19.00	95.47	95%	102,535	Kroger
Gwinnett Station	2180 Pleasant Hill Rd	1984	98,798	-	100	100%	98,798	
Venture Pointe	3875 Venture Dr	1995	93,220	$ 18.00	85.19	85%	79,414	Ashley Furniture Home Store, Hobby Lobby
Venture Pointe	3850 Venture Dr	1994	92,000		14.35	14%	13,202	Anna's Linens
Whole Foods Market	2025 Satellite Pt	1991	90,000	-	100	100%	90,000	
Kohl's	2050 W Liddell Rd	1996	86,584	-	100	100%	86,584	Kohl's
	2205 Pleasant Hill Rd	1997	82,510	-	100	100%	82,510	
	3325 Satellite Blvd	2002	76,220	-	100	100%	76,220	
Prado Exchange Shopping Center	2340 Pleasant Hill Rd	1986	75,674	$ 12.50	47.69	48%	36,089	

Source: CoStar, Inc.

Table A-3.38: Major Retail Centers (>75,000 SF), Study Area the Sugarloaf Core

Center Name	Address	Year Built	Rentable Building Area	Average Weighted Rent	Percent Leased	% Leased	Leased SF	Anchor Tenants
Discover Mills	5900 Sugarloaf Pky	2001	1,173665	NA	99.74	100%	1,170,613	AMC Theatres, Bass Pro Shops, Books-A-million, Burlington Coat Factory, Factory Brand Shoes, Jillian's, Neiman Marcus Last Call Clearance Center, Off 5th, Off Broadway Shoe Warehouse.
	1480 Satellite Blvd NW	2003	103,890	-NA	100	100%	103,890	
Kroger at Sugarloaf Parkway	6555 Sugarloaf Pky	1998	101,942	NA	96.8	97%	98,680	Kroger
Lifetime Fitness	1823 N Brown Rd	2007	100,000	-NA	100	100%	100,000	
The Shops at Huntcrest	1030-1032 Old Peachtree Rd	2002	97,040	NA	86.22	86%	83,668	Publix

Source: CoStar, Inc.

Table A-3.39: Major Industrial Buildings(>100,000 SF) in Study Area Gwinnett Place Core

Building Name	Building Address	Year Built	Land Area (AC)	Rentable Building Area	Average Weighted Rent	Avg Pct Leased
U.S. Postal Service Dist. Ctr	1605 Boggs Rd	1990	97.15	643,000	-	100%
Bldg 300	3105 Sweetwater Rd	1995	12.63	225,120	Neg.	43%
Northmont Atlanta - Mercedes	3025 Evergreen Dr	1990	16.7049	199,738	-	100%
Northmont Atlanta - ULine	2165 Northmont Pky	2000	12.9394	183,320	-	100%
	2100 Evergreen Blvd	2000	16.46	182,000	-	100%
	1685 Boggs Rd	1996	11	164,008	-	100%
Northmont Dist Ctr - Bldg 600	2995 Evergreen Dr	2001	10.9823	157,280	-	100%
Bldg 200	3105 Sweetwater Rd	1989	31.39	153,440	-	100%
	2750 Breckinridge Blvd	1995	17.67	152,000	-	100%
Bldg 200	1775 Breckinridge Pky	1997	11.65	151,330	$ 4.35	89%
Bldg 200	3939 Shackleford Rd	1989	35.629	149,000	-	100%
Bldg 400	2222 Northmont Pky	1999	7.84	145,940	-	100%
Northmont Dist Ctr - Bldg 500	2980 Evergreen Dr	1999	8.4497	140,200	-	100%
Northmont Atlanta - McKesson	2975 Evergreen Dr	1999	15.5	139,000	-	100%
Gwinnett Pavilion - Deutz	3883 Steve Reynolds	1990	7.08	137,061	-	100%
	2940 Old Norcross Rd	1994	7.46	132,394	-	100%
Bldg 1	1925 Breckinridge Plz	2001	54	132,000	-	100%
Curtis 1000	1725 Breckinridge Pky	1996	14.4	130,000	-	100%
Bldg 200	1680 Executive Dr S	2000		128,798	-	100%
Breckinridge	2670 Breckinridge Blvd	1996	7.65	124,060	-	100%
Bldg 200	2220 Northmont Pky	1998	9	123,536	-	100%
	2700 Breckinridge Blvd	1995	11.62	120,000	$ 3.05	100%
Bldg 2000	2405 Commerce Ave	1998	12	119,517	-	100%
	2590 Breckinridge Blvd	1987	9.7	118,560	-	100%
Gwinnett Corp Center III - 1770	1770 Corporate Dr	1988	6.8	116,426	$ 5.57	34%
	3357 Breckinridge Blvd	2007	6.1	113,863	-	100%
Bldg 1	2150 Northmont Pky	1990	7.3	103,200	Neg.	80%
Bldg 300	1750 Breckinridge Pky	1996	7.52	100,640	$ 4.50	88%

Source: CoStar, Inc.

Table A-3.40: Major Industrial Buildings(> 100,000 SF) in Study Area the Sugarloaf Core

Building Name	Building Address	Year Built	Land Area (AC)	Rentable Building Area	Average Weighted Rent	Avg Pct Leased
Panasonic Building	1225 Northbrook Pky	1995	36	495,455	-	100%
Bldg 3	2150 Breckinridge Blvd	2000	20.61	451,200	-	100%
Bldg 1	4005 Newpoint Pl	1997	33.96	414,160	-	100%
Bldg 2A	4505 Newpoint Pl	1999	18.83	350,350	$ 3.63	100%
Sugarloaf 85	1800 Satellite Blvd		70	346,000	-	100%
Newpoint Place V	2499 Newpoint Pky	2007	21	262,500	-	100%
Satellite Distribution Center - 1	1600 Cross Pointe Way	1997	16.28	260,000	Neg.	76%
Peachtree North Four	1327 Northbrook Pky	1998	15.62	232,359	$ 4.11	38%
Nexpak-Deluth	2444 Meadowbrook Py	1991	23.4	222,524	Neg.	0%
Peachtree North One	1300 Northbrook Pky	1997	27.11	201,429	-	100%
Peachtree North Two	1200 Northbrook Pky	1997	27.11	187,638	$ 3.95	86%
Bldg 5	1630 Satellite Blvd	1999	12.2515	182,400	-	100%
	2600 Pinemeadow Ct	1989	17.01	176,910	$ 4.99	70%
Northmont Dist Ctr - Bldg 700	2221 Northmont Pky	2006	35.36	170,000	Neg.	100%
Bldg 300	2160 Breckinridge Blvd	2005	13.66	168,200	$ 3.25	0%
Northmont Dist Ctr - Bldg 900	2205 Northmont Pky	2006	14.2	167,000	-	100%
	2100 Boggs Rd	1991	5.62	150,000	-	100%
Bldg 2B	4205 Newpoint Pl	2000	14.25	150,000	-	100%
	2625 Pinemeadow Ct	1994	9.57	139,540	-	100%
Newpoint Place IV	3505 Newpoint Pky	2001	14.24	135,372	-	100%
Newpoint Place II	2105 Newpoint Place	1999	14.24	131,400	-	100%
MacLeod Industrial Park - Bldg F	1775 MacLeod Dr	1987	10.02	130,410	-	100%
Corporate Lake Intl - 1700	1700 Belle Meade Ct	1987	8.1	123,000	-	100%
Bldg 3	1645 Satellite Blvd	1999	11.98	120,000	-	100%
Newpoint Place I	2000 Newpoint Place	1998	30	118,800	-	100%
Bldg 400	2150 Boggs Rd	1997	8	118,060	Neg.	100%
	1725 MacLeod Dr	1996	15.96	116,522	-	100%
Bldg 2	1620 Satellite Blvd	1999	11.94	115,518	-	100%
Bldg 3	1610 Satellite Blvd	1998	18.18	114,718	-	100%
Bldg 200	2160 Breckinridge Blvd	2001	8	108,720	$ 2.93	100%
Bldg 100	2160 Breckinridge Blvd	2001	9	104,180	$ 3.95	57%
	2660 Pinemeadow Ct	1996	6	104,000	-	100%
	2450 Satellite Blvd	1994	5.87	102,862	-	100%
Bldg 1	1790 Satellite Blvd	1999	11.4756	101,000	-	100%

Source: CoStar, Inc.

Table A-3.41: Class A Office Buildings: Gwinnett Place Core

Building Address	Building Name	Building Class	Year Built	Number Of Stories	Rentable Building Area	Percent Leased	Average Weighted Rent
5030 Sugarloaf Pky	Scientific Atlanta Complex	A	1999	4	600,000	100%	-
3700 Crestwood Pky	Gwinnett Commerce Center	A	1985	10	213,563	83%	$ 19.50
3175 Satellite Blvd	Bldg 600	A	1999	6	149,967	76%	$ 21.35
3235 Satellite Blvd	Bldg 400	A	1998	6	141,371	54%	$ 21.19
3239 Satellite Blvd	Bldg 500	A	2000	6	137,328	100%	-
3097 Satellite Blvd	Bldg 700	A	2002	6	134,785	100%	-
3095 Satellite Blvd	Bldg 800	A	2002	6	133,832	86%	$ 18.18
3237 Satellite Blvd	Bldg 300	A	1998	6	132,177	76%	$ 21.22
3950 Shackleford Rd	Hampton Green I	A	2000	5	125,280	85%	$ 18.50
3473 Satellite Blvd	The Crescent	A	1985	3	113,368	73%	$ 17.00
3805 Crestwood Pky	Crestwood Pointe I	A	1997	5	109,940	91%	$ 18.50
3885 Crestwood Pky	Crestwood Pointe II	A	1998	5	109,760	63%	$ 18.50
3505 Koger Blvd	Gwinnett Center-Duluth	A	2000	4	98,723	39%	$ 19.00
3575 Koger Blvd	Gwinnett Center-Gwinnett	A	1990	4	93,353	31%	$ 17.50
3675 Crestwood Pky	Crestwood Building	A	1986	5	92,050	53%	$ 18.00
2675 Breckinridge Blvd	Park Summit	A	1987	5	86,199	100%	-
3555 Koger Blvd	Gwinnett Center-Clarkston	A	1998	3	71,786	69%	$ 17.05

Source: CoStar, Inc, BAG.

Table A-3.42: Class A Office Buildings: Sugarloaf Core

Building Address	Building Name	Building Class	Year Built	Number Of Stories	Rentable Building Area	Percent Leased	Average Weighted Rent
Sever Rd	Built to Suit	A			175,000	100%	
2055 Sugarloaf Cir	Overlook at Sugarloaf	A	2000	6	157,486	59%	$ 20.50
2530 Sever Rd	IntelliCenter - Atlanta	A	2006	3	150,063	75%	$ 21.75
2050 Sugarloaf Cir		A		4	123,000	2%	Neg.
1960 Satellite Blvd	One Sugarloaf Centre	A	2009	4	108,686	89%	Neg
6340 Sugarloaf Pky		A	2003	4	103,742	97%	$ 21.50
2160 Satellite Blvd		A	2000	4	85,343	89%	$ 21.50
2180 Satellite Blvd		A	1998	4	85,330	77%	$ 21.50
2170 Satellite Blvd		A	1999	4	85,312	94%	$ 21.50

Source: CoStar, Inc, BAG.

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