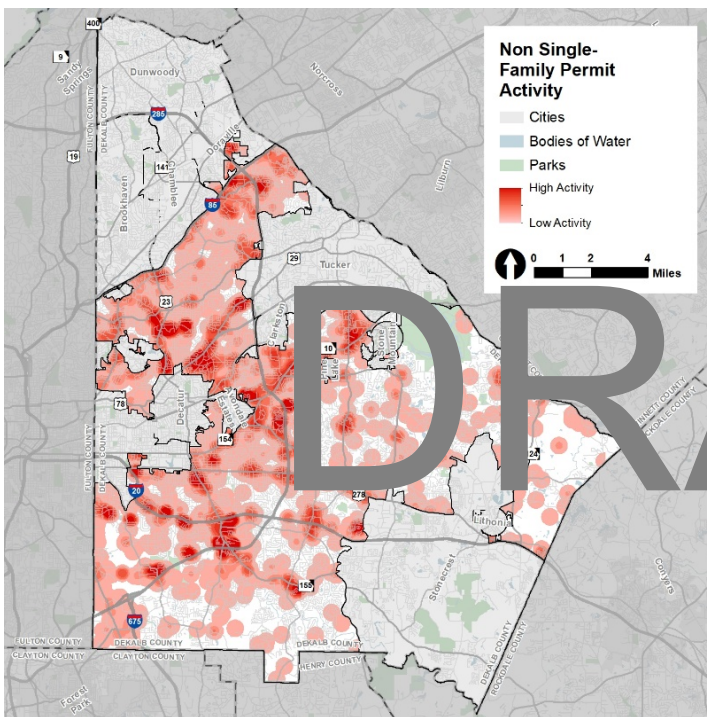


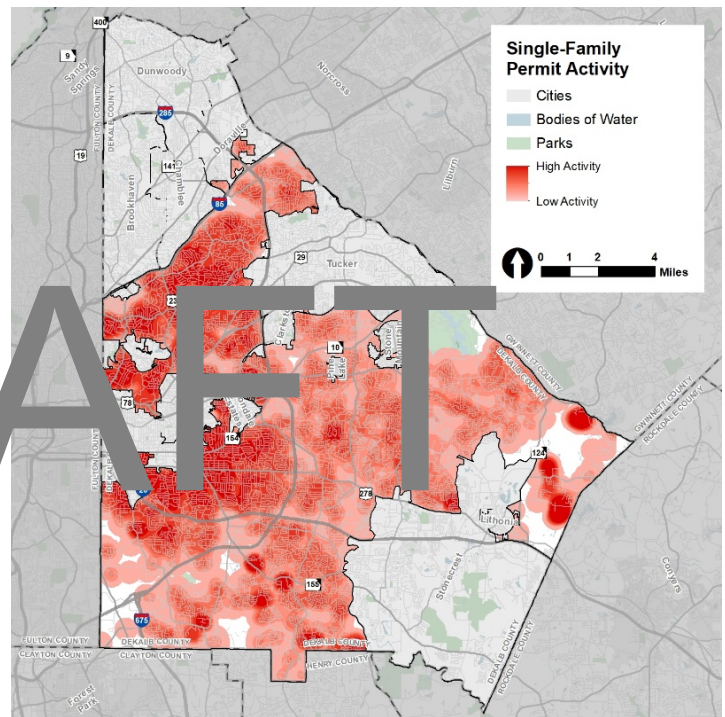
## RECENT DEVELOPMENT ACTIVITY

A total of 11,915 non-single-family residential permits and 9,898 single-family permits were approved from 2016-2020 in unincorporated areas of the County. While it would appear from **Figure 24** and **Figure 23** that the preponderance of development has been single-family homes, this is a result of the highly concentrated nature of non-residential development patterns. As can be seen in **Figure 24**, much of the non-residential development has occurred within activity centers and along major corridors and mostly within or near I-285.

Single-family development has occurred throughout the County with the highest concentrations of development occurring within the I-285 Perimeter and in the far eastern quadrant. Development activity is densest in areas with the greatest access, including but not limited to major arterials and public transportation. The biggest takeaway is that while development activity may be highest inside of the perimeter, activity is still relatively widespread across the entirety of the County.



**Figure 24. Non Single-Family Permit Activity**



**Figure 23. Single-Family Permit Activity**

## HOUSING

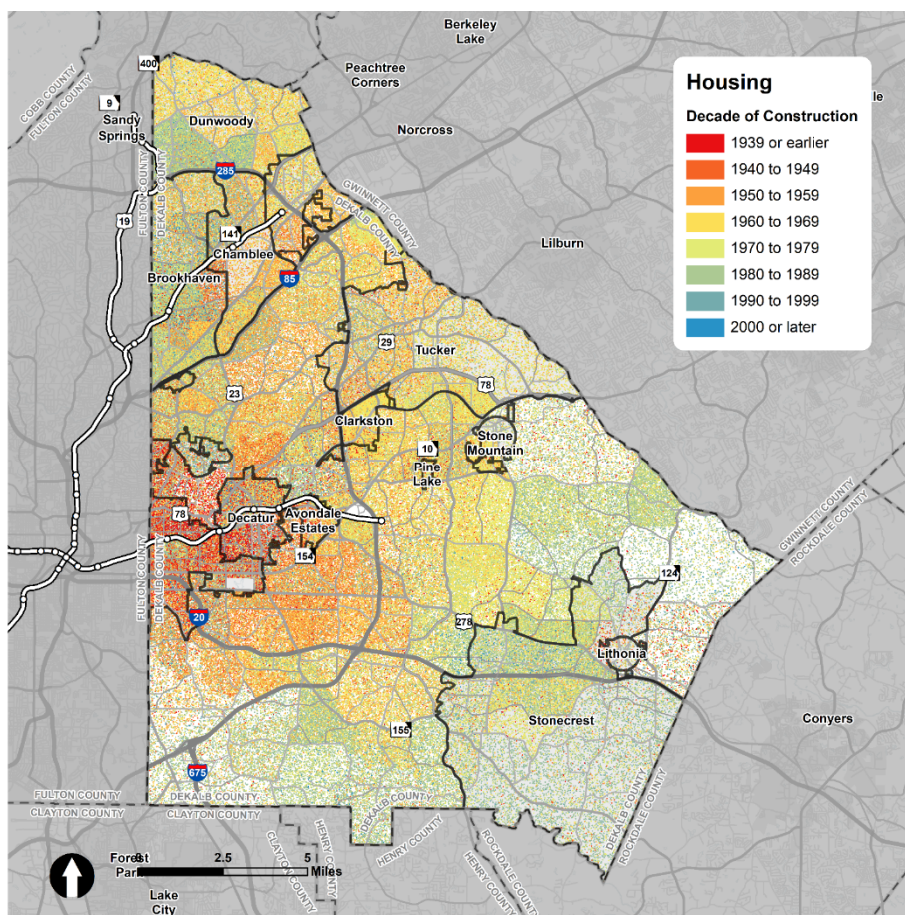
### Housing Inventory Overview

In 2020 DeKalb County included approximately 327,000 housing units, an increase of 21,729 units from 2010 ( **Table 3**). Previously completed housing studies highlighted the critical need to establish strategies to provide a wide range of housing options, both in type and in price. As demonstrated in recent housing studies, the increase in housing supply in DeKalb County has lagged peer counties and the Atlanta region. DeKalb's share of the region's housing units has declined from 14.0% in 2010 to 13.4% in 2020. The County captured only 8.2% of the ten-year regional housing unit increase. DeKalb County has a more established land use pattern, resulting in a slower rate of growth with fewer large-scale, undeveloped (greenfield) opportunities when compared to more suburban or rural metro counties.

**Table 3. Comparison of Total Housing Units, 2010-2020**

Area	2010	2020	2010-2020 Δ		
			#	%	CAGR
DeKalb County	304,968	326,697	21,729	7.1%	0.7%
Atlanta MSA	2,172,967	2,439,548	266,581	12.3%	1.2%
<b>County % MSA</b>	<b>14.0%</b>	<b>13.4%</b>	<b>8.2%</b>		

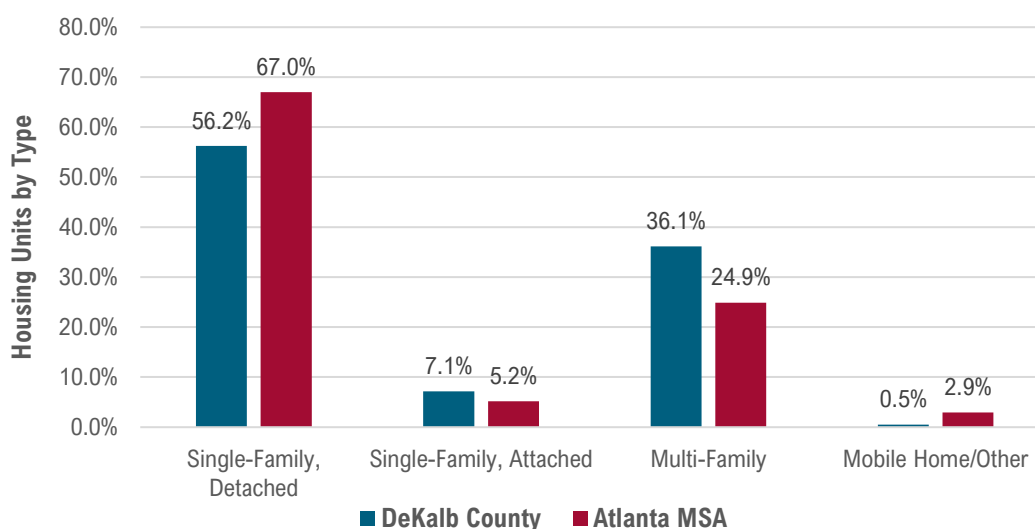
Although the total housing inventory in DeKalb County has increased by nearly 22,000 units since 2010, the median year built (1981) is the oldest across the Atlanta metro region. Nearly 50% of all units were completed prior to 1980. Approximately 20.8% of the inventory in DeKalb County has been completed since 2000. As shown on **Figure 25**, the oldest housing units in DeKalb County are concentrated in areas close to Downtown Atlanta, but were constructed based on desirable attributes at the time. Many of these houses are auto-oriented, single-use areas with low- to moderate-densities.



**Figure 25. Decade of Construction**

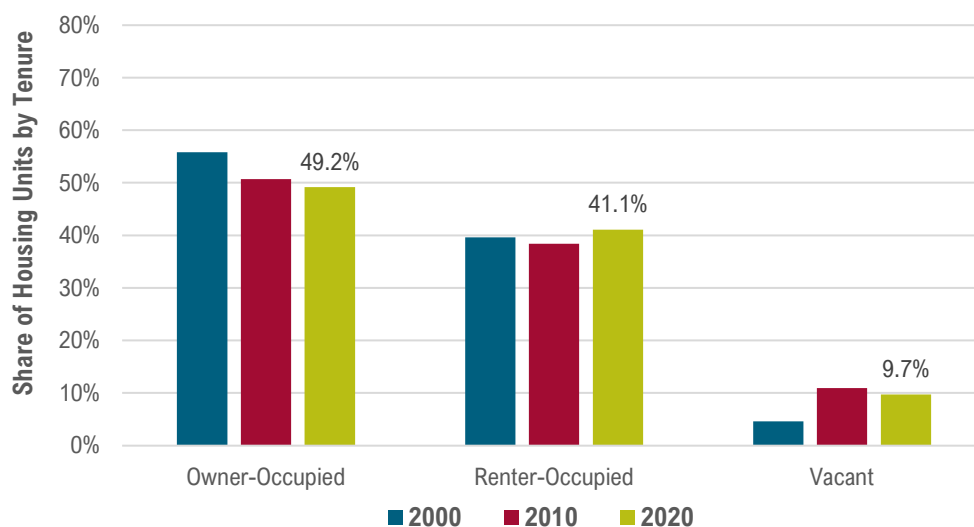


More than 56% of all the housing units in DeKalb County are detached single-family, lower than the 67% share reported for the Atlanta region (**Figure 26**). This reflects a relatively urban landscape, particularly in the western portion of DeKalb County, offering easy access to major employment centers. Comparatively, multifamily and attached single-family/townhome-style units are more prevalent in the County, than in the region. Both geographies have low shares of mobile homes or other types of residential units that often represent a component of naturally occurring affordable housing.



**Figure 26. Comparison of Housing Units by Type, 2018**

Housing unit tenure measures the share of owner-occupied, renter-occupied, and vacant housing units. As shown in **Figure 27**, DeKalb County has a 2020 owner-occupied share of 49.2% and a renter-occupied share of 41.1%. The share of owner-occupied housing units declined five percentage points between 2010 and 2020, while renter-occupancy increased. This pattern is consistent with national trends that demonstrated a shift towards renting following the 2007-2009 Great Recession and the aging of the Millennial generation. Vacant housing units make up approximately 9.7% of the total inventory, representing an improvement from 2010 which reflects the impact of the housing and mortgage crisis.

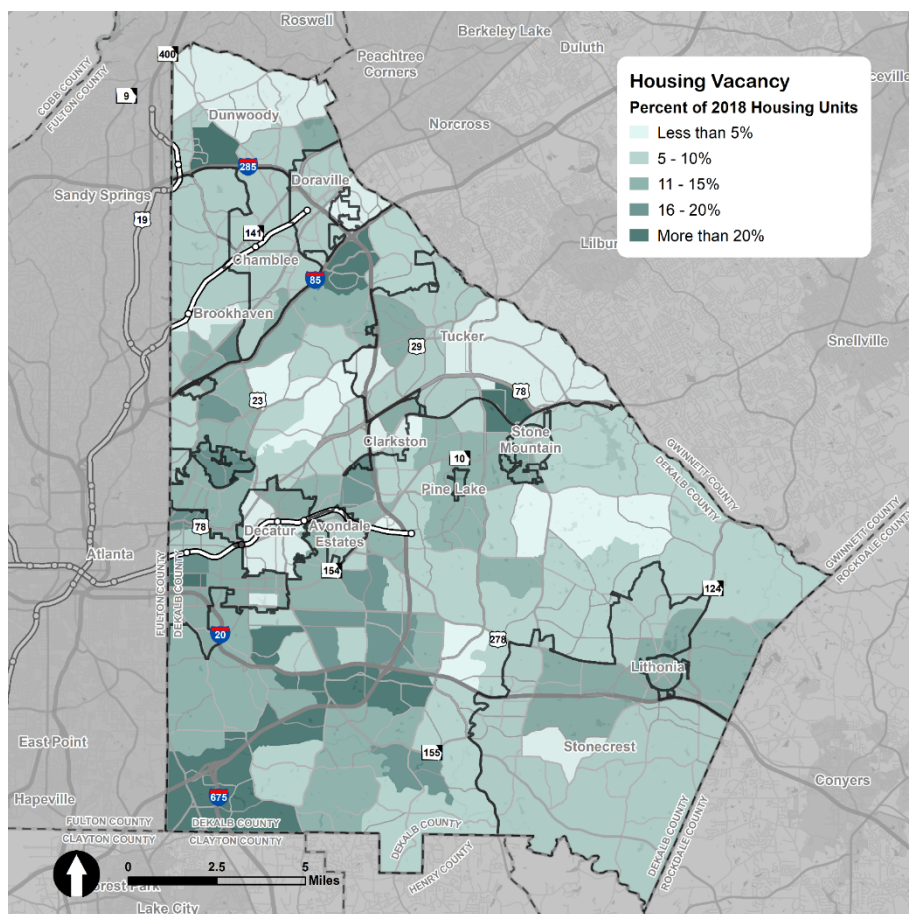


**Figure 27. Comparison of Housing Units by Tenure, 2000-2020**

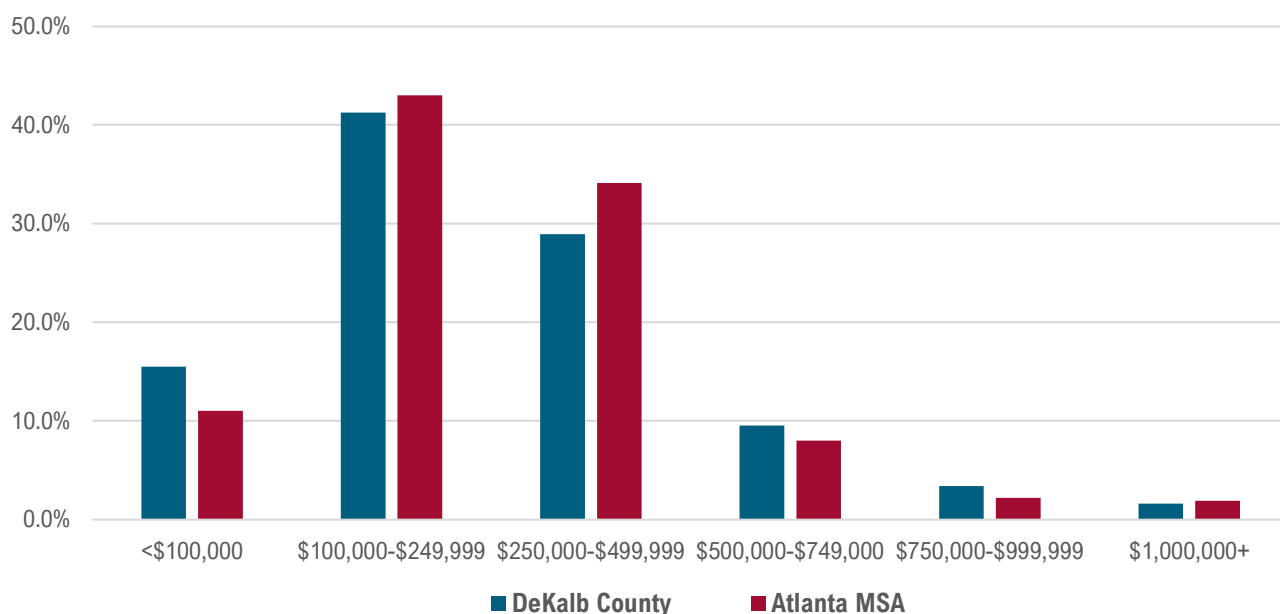
As previously noted, housing unit vacancy in DeKalb County was estimated at 9.7% in 2020. As can be seen in **Figure 28** this measure is not uniform across the County, with clear pockets of higher and lower vacancy rates. Generally, the lowest vacancy rates tend to align with municipal boundaries, particularly in places with access to services, amenities, and multi-modal transportation. Higher vacancy rates are more predominate in the southern and western portions of DeKalb County.

## Housing Value

The most common range of housing value in DeKalb County is between \$100,000 and \$249,999, comprising 41.2% of all housing units (**Figure 29**). This is consistent with the most common range in the region. The County has higher shares of units valued below \$100,000, as well as some ranges on the higher end of the spectrum, including homes valued between \$500,000 and \$749,999. The region has a higher share of units valued between \$250,000 and \$499,999.



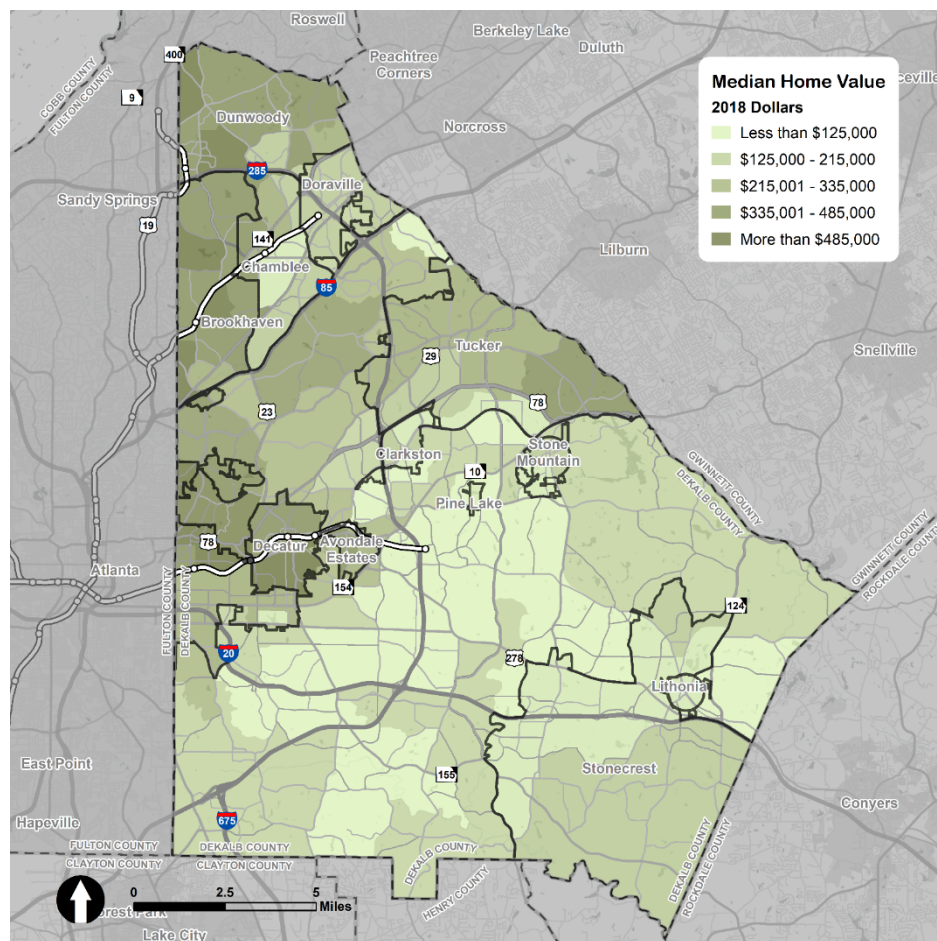
**Figure 28. Housing Vacancy**



**Figure 29. Share Housing Units by Value, 2020**



**Figure 30** demonstrates the distribution of housing values across the County. Median housing values are highest in areas of DeKalb with easy access to jobs, transportation infrastructure, and retail services and amenities. The highest values are concentrated in the north and western portions of the County. The presence of fixed-rail transit has overlap with higher median housing values, particularly in and around the Decatur, Brookhaven, and Dunwoody communities.



**Figure 30. Median Home Value**

## For-Sale Residential

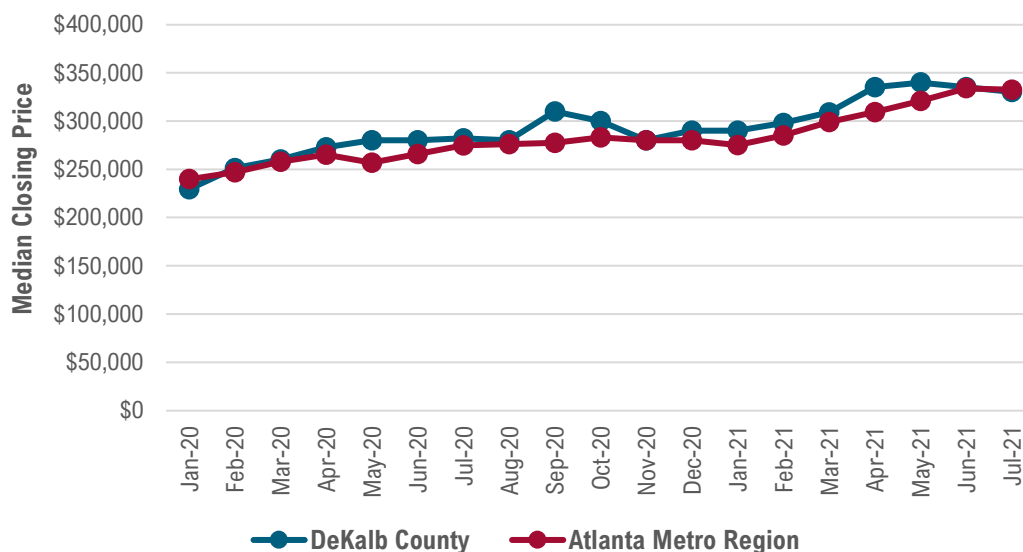
The inventory of new active residential listings in DeKalb County has declined since the beginning of 2020 (**Figure 31**). New active listings were at their highest around the onset of the COVID-19 pandemic, exceeding 2,000 new listings per month. Listings declined through the balance of 2020, reaching a low of 830 units newly listed in March of 2021. At the same time, the number of closed sales has gradually increased, resulting in homeowner demand outpacing supply.

This trend is consistent with activity in the larger Atlanta metro region and in other metropolitan areas across the United States. Despite elevated unemployment rates and uncertainty resulting from the pandemic, the housing market in Atlanta has remained strong. For-sale inventories in the region total only 1.3 months of supply based on current demand levels across the region, an all-time low. Current housing shortages are not expected to dissipate, which has led to a strong seller's market, inflating the cost of housing across the region and in DeKalb County.



**Figure 31. For-Sale Residential Closing Activity, 2020-2021**

Despite a reputation for offering comparatively affordable housing with easy access to major regional job centers, median closing prices in DeKalb County have kept pace with the metro since the beginning of 2020. Since the beginning of 2021, closing prices for for-sale residential units have increased by 13.7%. The median closing price in DeKalb County in July 2021 was \$330,000, nearly identical to the measure for the entire region. Both areas have experienced strong growth over the last 18 months, as shown in [Figure 32](#).



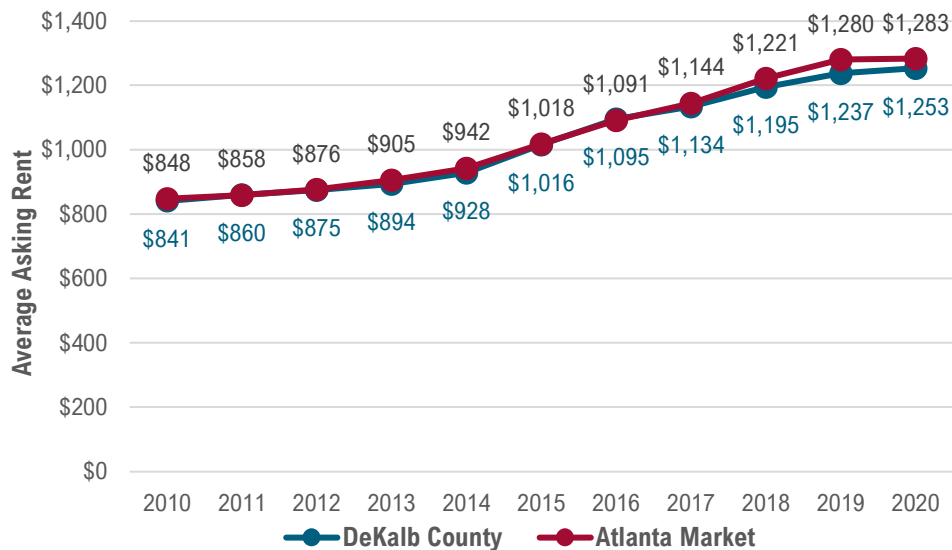
**Figure 32. For-Sale Residential Closing Prices, 2020-2021**

## Rental Multi-family Residential

There were approximately 74,000 rental units in DeKalb County in professionally managed communities with 25 or more units, with the greatest concentration built in the 1970s (24.4% of total inventory) and 1980s (25.3%). Only about a third of rental units in DeKalb County were built after 1990, compared to over half of rental units in the Atlanta Metropolitan Statistical Area (MSA).

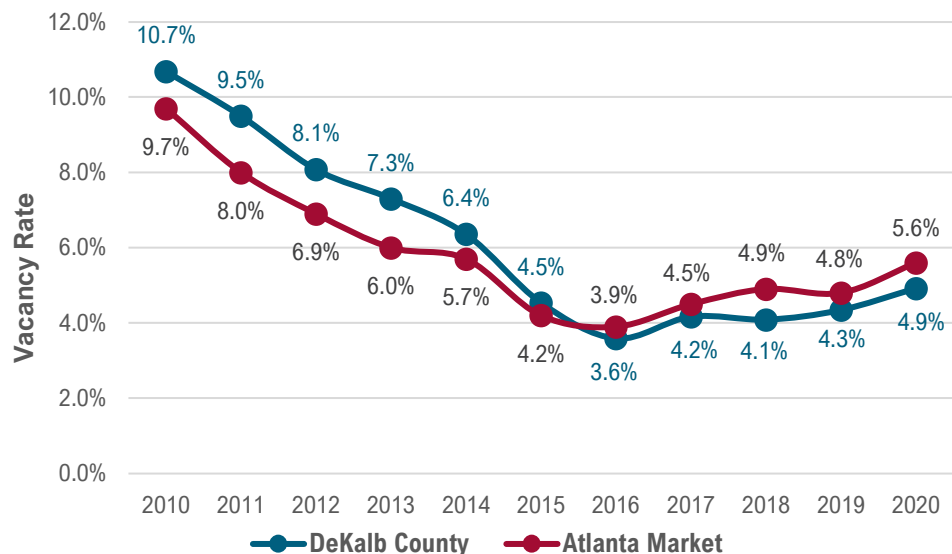


The average monthly rent for DeKalb County is slightly below that for the overall Atlanta Market (**Figure 33**). Monthly rent in the county has increased by about \$400 over the last ten years. The average monthly rent in DeKalb County has remained consistent with the average reported for the rest of the region.



**Figure 33. Average Monthly Apartment Rent, 2010-2020**

Vacancy rates stood at over 10% in DeKalb County in 2010 coming out of the 2007-2009 Great Recession (**Figure 34**). From 2010-2016, these rates declined to a low of 3.9%. Vacancy rates experienced a slight increase to 5% by 2020. Both the larger Atlanta region and DeKalb County have vacancy rates that are considered healthy, below the industry-standard 7% threshold typically used to describe a market that can accommodate inter- and intra-market moves.



**Figure 34. Apartment Vacancy Rates, 2010-2020**

## Metro Atlanta Housing Strategy

The Atlanta Regional Commission (ARC) created the Metro Atlanta Housing Strategy (the Housing Strategy) to guide communities through their housing challenges with a regional approach. The Housing Strategy area covers the ten

counties surrounding Atlanta including Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, and Rockdale. The goal of the Metro Atlanta Housing Strategy is “fostering a greater mix of housing options reflective of each community’s specific needs.”

“The Metro Atlanta Housing Strategy is designed to be:

- **Educational:** serve as a source of information for policy makers and the public to learn about housing affordability.
- **Analytical:** provide data to help communities understand their housing characteristics, issues, and opportunities.
- **Actionable:** provide local governments with the tools they need to identify local housing challenges and solutions.”

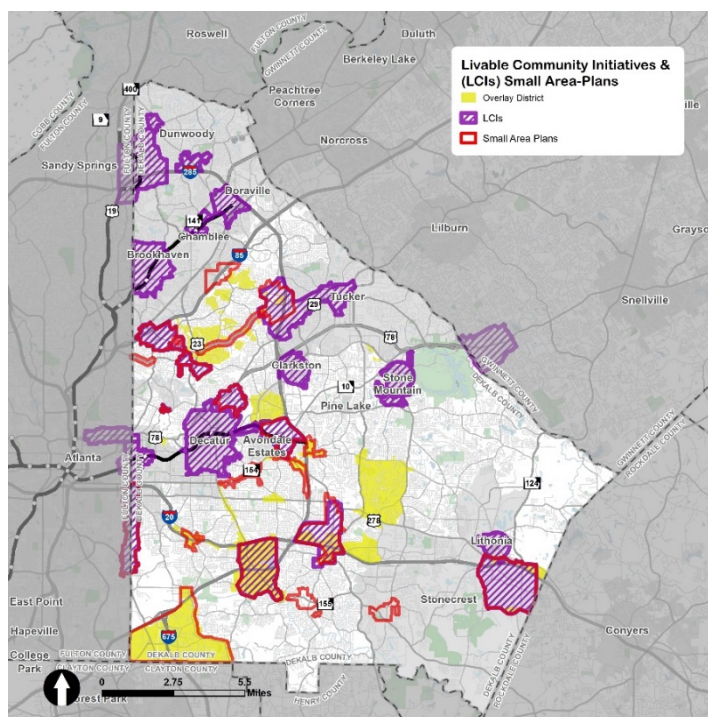
The overarching regional trend shows that housing prices are rising much quicker than wages. Actionable implementation steps based on ten different submarket types across the region were identified as part of the Strategy. The 10-county area was organized into submarkets based on a variety of housing metrics, including housing price, the presence of employment centers, growth in price points, and areas vulnerable to gentrification. DeKalb County includes nine of the ten identified submarket types. Common themes that emerged across the high-level strategies identified for DeKalb County include:

- Increasing housing supply through reducing development barriers;
- Reducing development and transportation costs;
- Establishing policies to support and promote affordable housing;
- Expanding financial resources through creative mechanisms to promote housing development;
- Promoting housing stability and protecting against gentrification; and
- Developing leadership and collaboration on affordability.

## OVERLAYS AND AREA PLANS

The Atlanta Regional Commission’s Livable Centers Initiative (LCI) is a grant program that helps local municipalities increase mobility, encourage healthy lifestyles, and improve access to jobs and services. The program encourages housing diversity, employment, commercial, shopping, and recreational land uses. Additionally, DeKalb County has developed several Small Area Plans (SAPs) for certain activity centers (**Figure 35**). Though similar in intent, SAP’s are generally smaller in scale and scope than LCI studies, and may receive their funding from alternative sources rather than the ARC.

The LCI study areas and SAPs are evenly dispersed throughout the County and many overlap with areas designated as regional or town center activity centers. There are a few limited areas and activity centers in eastern DeKalb that do not have an LCI study or SAP.

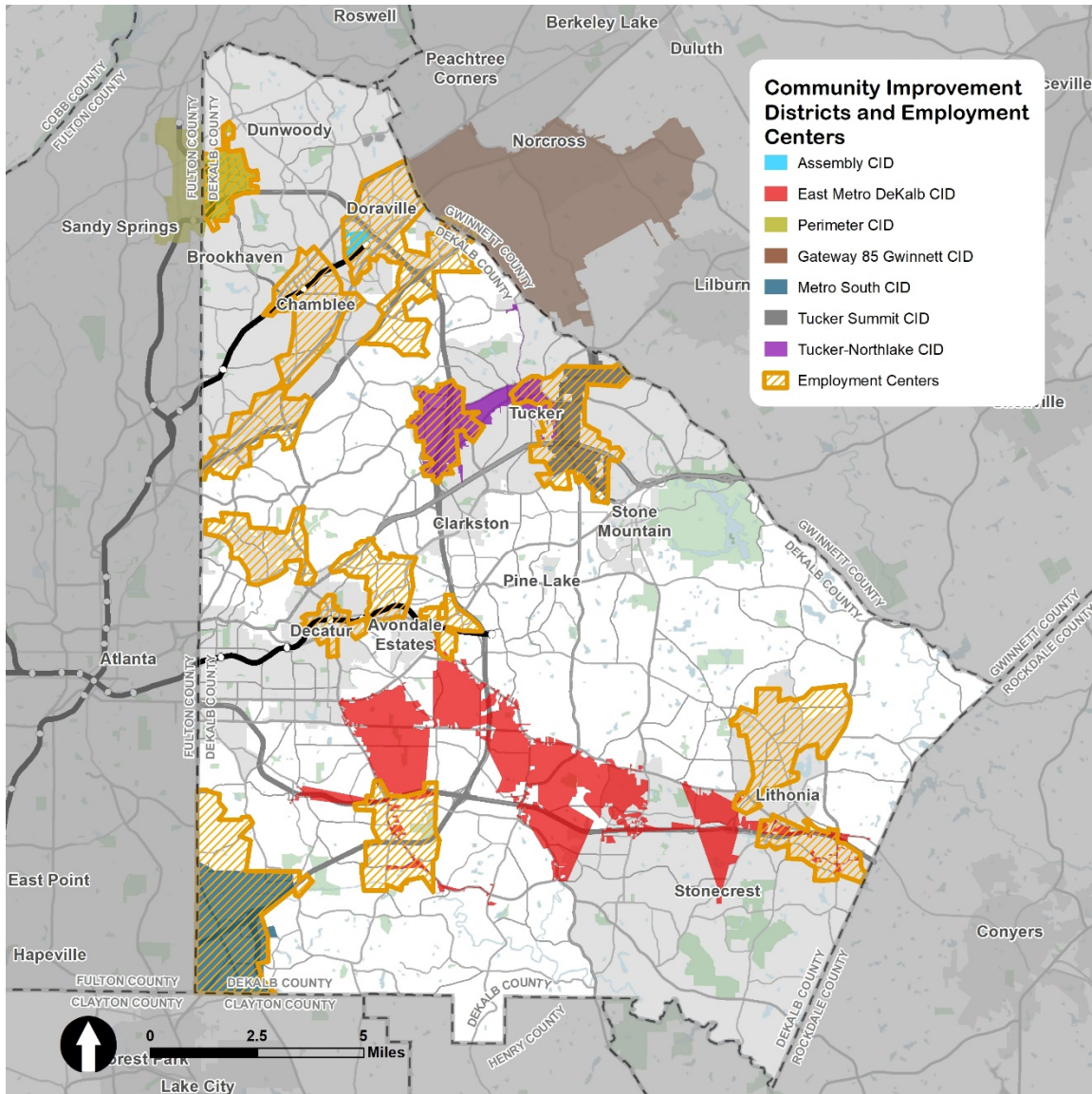


**Figure 35. Livable Community Initiatives and Small-Area Plans**



## COMMUNITY IMPROVEMENT DISTRICTS

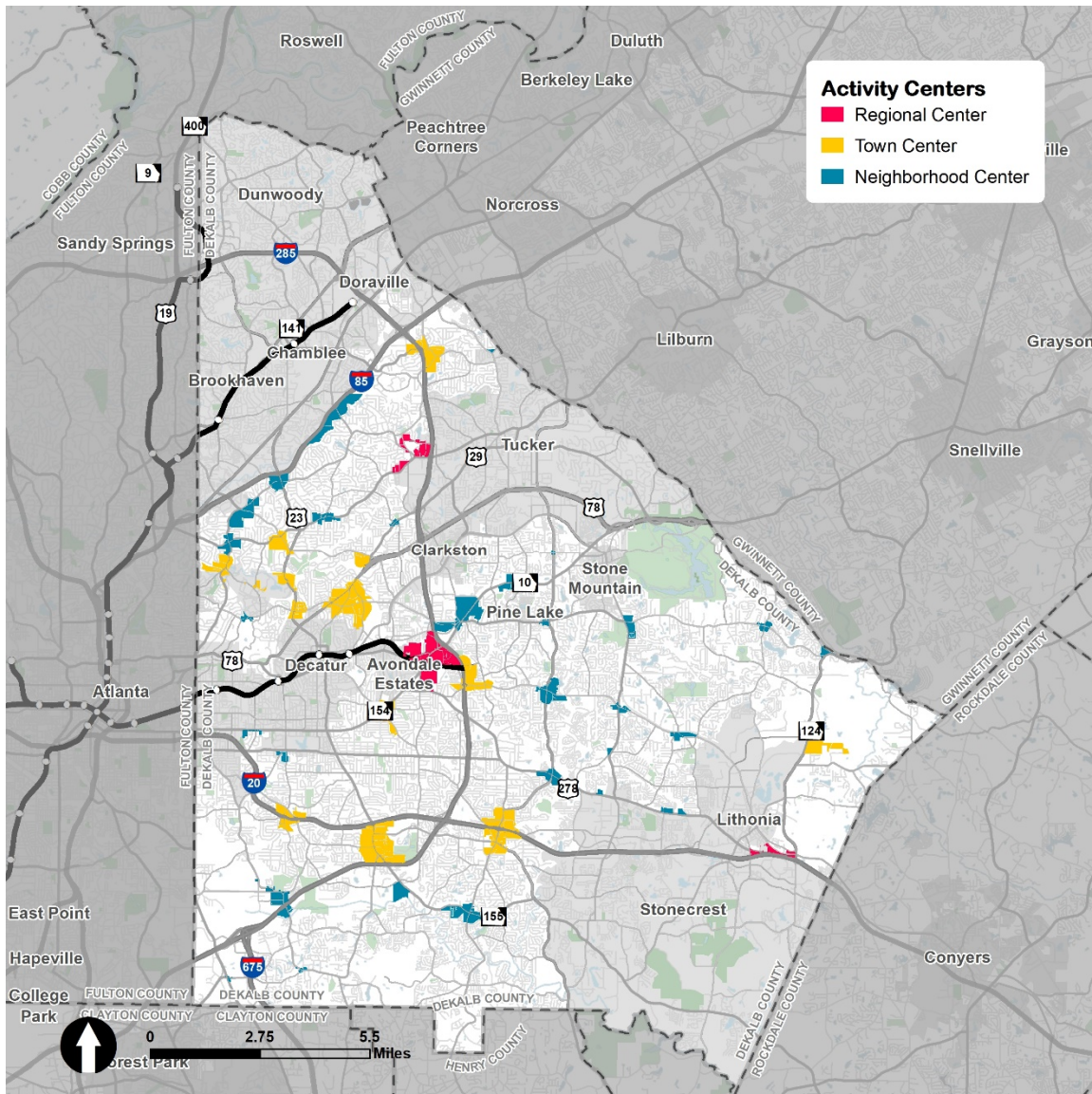
Community Improvement Districts (CIDs) are self-taxing business districts generating funding for improvements within a defined area. Throughout Metropolitan Atlanta, CIDs have partnered with local jurisdictions and others to plan for and attract additional public and private investments. Projects commonly funded by CIDs include road maintenance and improvements, streetscapes, bicycle and pedestrian facilities, public transit facilities and amenities, parks and civic space, stormwater facilities, and other infrastructure improvements. Several CIDs overlap with Activity Centers, LCIs, and SAPs, and may provide partnership opportunities for future planning and implementation of public improvements as illustrated in **Figure 36**. Also shown are the DeKalb County Economic Development Strategic Plan Employment Centers.



**Figure 36. Community Improvement Districts**

## EXISTING ACTIVITY CENTERS

**Figure 37** depicts locations identified as activity centers within the previous Comprehensive Plan. Activity centers are categorized as Regional Center, Town Center, and Neighborhood Center based on the level of activity and development, with land uses, heights and densities, and other policies tailored to each designation. Investment and development activity are high in northern and central-western portions of the County but are much less robust in southern and central and eastern portions of the County. Lack of development in these areas may be due to several factors, including lower population densities and lower spending power. The large number of centers in south and east DeKalb may also play a role in diluting the ability of the market to catalyze around a few key locations. Consolidation of activity centers may allow for targeted investment that has a greater impact to jump start development in these areas.



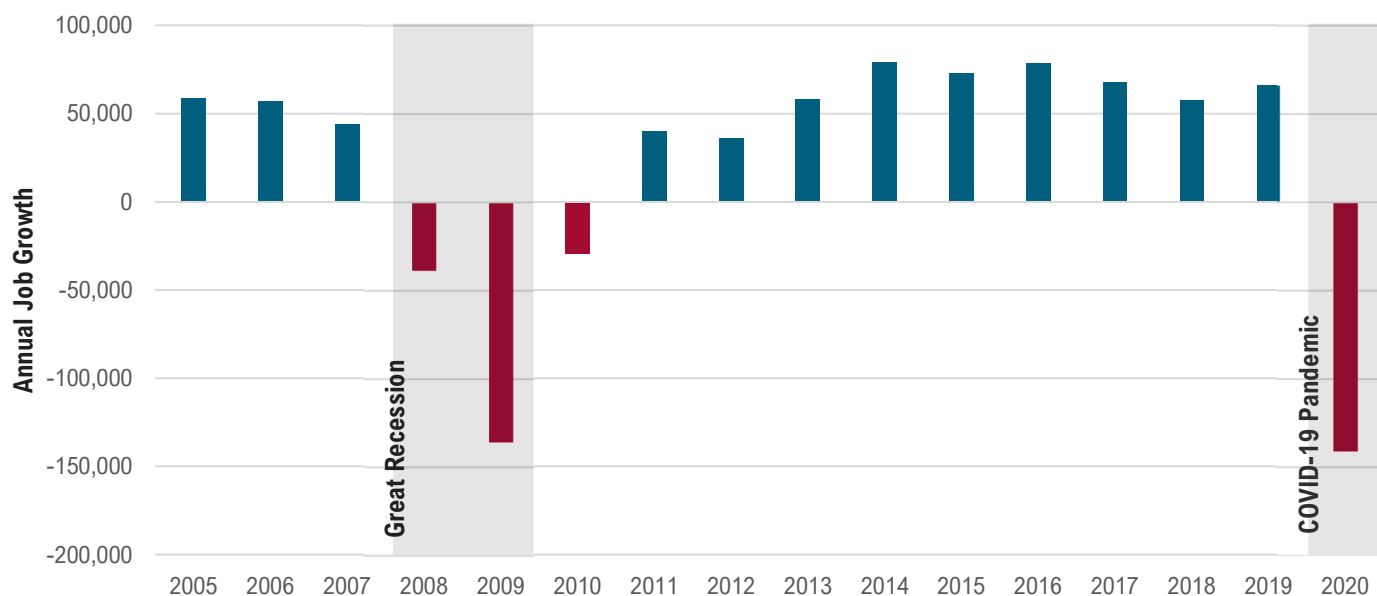
**Figure 37. Activity Centers**



## EMPLOYMENT AND LABOR FORCE

### Regional Employment

Consistent with trends experienced in other large metropolitan areas, the Atlanta MSA economy was significantly interrupted by the 2007-2009 Great Recession, reporting annual net job loss during and immediately after this period (**Figure 38**). Notable declines were demonstrated in 2009 with a net loss of more than 135,000 jobs and again in 2020 with 141,000 jobs lost across the region. In the years between 2011 and 2019, the MSA posted annual net job gains averaging approximately 60,000 jobs per year.



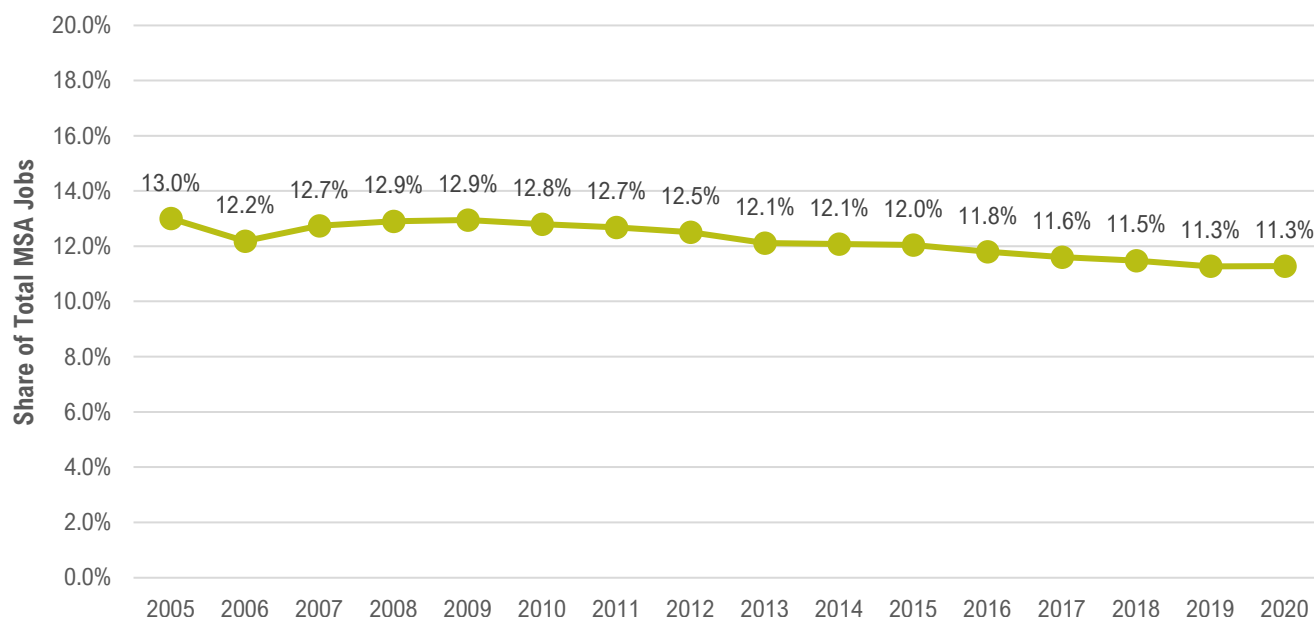
**Figure 38. Annual Job Growth, Atlanta MSA, 2005-2020**

Since March 2020, the United States has been heavily impacted by the COVID-19 pandemic, which has resulted in job losses in every region of the country. Retail Trade, Entertainment, Hospitality and Food Services have been hit particularly hard as many establishments were required to close or restrict business to stop the spread of the virus.

Annualized employment for 2020 demonstrates the immediate impact of the COVID-19 pandemic on the region, as well as a subsequent recovery. Between the first and second-quarter of 2020, which includes the initial onset of COVID-19 and widespread stay-at-home orders, the Atlanta region lost over 300,000 jobs. Total employment in the region began to recover between second and third-quarter 2020, adding approximately 108,000 jobs back into the economy and reaching 2.5 million jobs. Another 85,000 jobs were added back to the local economy between third-quarter and fourth-quarter 2020. The fourth-quarter 2020 jobs measure is approximately 4.9% lower than the fourth-quarter estimate for 2019 (2.7 million). The Atlanta region has experienced strong recovery following the onset of the pandemic, but like most major metropolitan areas across the United States, has yet to exceed pre-pandemic job levels.

### DeKalb County Employment

With over 287,300 jobs in 2020, DeKalb County comprised 11.3% of the Atlanta MSA total. DeKalb County's share of jobs within the region decreased in the last 15 years (**Figure 39**), from 13.0% in 2005 to 11.3% in 2020. This is likely due in part to rapid job growth in other employment centers in the region located outside DeKalb County.



**Figure 39. DeKalb County Share of Regional Jobs, 2005-2020**

Total employment in DeKalb County grew year over year between 2015 and 2019 before measuring a decline in 2020 due to the COVID-19 pandemic ([Table 4](#)). Consistent with national and regional trends, DeKalb County experienced a significant loss in jobs immediately following the onset of the pandemic. DeKalb County experienced a decline of 28,300 jobs between first-quarter and second-quarter 2020. Since that time, the County has been in recovery, reaching approximately 291,110 jobs in fourth-quarter 2020 which is 15,000 fewer jobs than the same time the previous year. From the beginning of quarter one to the end of quarter four, the greatest losses were in the Wholesale Trade, Retail Trade, and Accommodation and Food Services sectors.

As of 2020, Healthcare was the largest industry sector in the County, followed by Educational Services and Retail Trade. Overall, ten of the 20 industry sectors analyzed experienced a decline in the last five years, largely due to significant job losses from the pandemic. Consistent with the larger region, although clear recovery has been modest in most job sectors since March 2020, the overall job total has not yet exceeded pre-pandemic levels. The largest job increases in the last five years included:

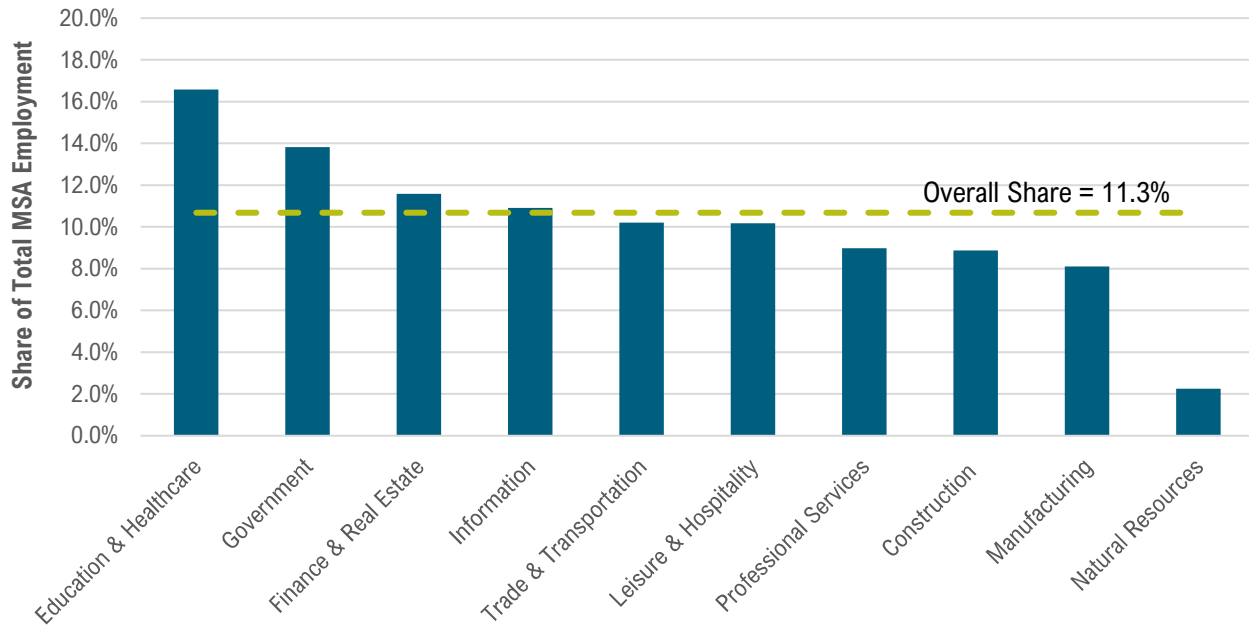
- Finance and Insurance (+2,254)
- Educational Services (+2,216)
- Public Administration (+1,700)
- Health Care and Social Assistance (+1,262)
- Real Estate and Rental/Leasing (+707)

**Table 4. Annualized Employment by Industry, DeKalb County, 2015-2020**

Industry	2015	2020	2015-2020 Δ	
			#	%
Finance and Insurance	12,077	14,331	2,254	18.7%
Educational Services	34,114	36,330	2,216	6.5%
Public Administration	15,528	17,228	1,700	10.9%
Health Care and Social Assistance	47,404	48,666	1,262	2.7%
Real Estate and Rental and Leasing	3,977	4,684	707	17.8%
Other Services, Ex. Public Admin	8,129	8,275	146	1.8%
Construction	10,032	10,131	99	1.0%
Mining	78	115	37	47.4%
Administrative and Waste Services	19,986	20,010	24	0.1%
Agriculture, Forestry, Fishing & Hunting	9	14	5	55.6%
Utilities	938	928	-10	-1.1%
Management of Companies and Enterprises	7,246	7,127	-119	-1.6%
Professional and Technical Services	17,851	17,596	-255	-1.4%
Manufacturing	13,086	12,687	-399	-3.0%
Arts, Entertainment, and Recreation	3,264	2,764	-500	-15.3%
Transportation and Warehousing	16,032	14,407	-1,625	-10.1%
Information	11,499	9,771	-1,728	-15.0%
Retail Trade	33,591	31,235	-2,356	-7.0%
Wholesale Trade	12,450	10,012	-2,438	-19.6%
Accommodation and Food Services	22,791	20,168	-2,623	-11.5%
<b>Total</b>	<b>290,082</b>	<b>286,479</b>	<b>-3,603</b>	<b>-1.2%</b>

DeKalb County's 286,479 total jobs in 2020 comprised 11.3% of the regional total. The employment sectors in the County that comprise the largest shares of the regional total include Education and Healthcare (16.6% of total), Government (13.8%), Finance and Real Estate (11.6%), and Information (10.9%) (**Figure 40**).

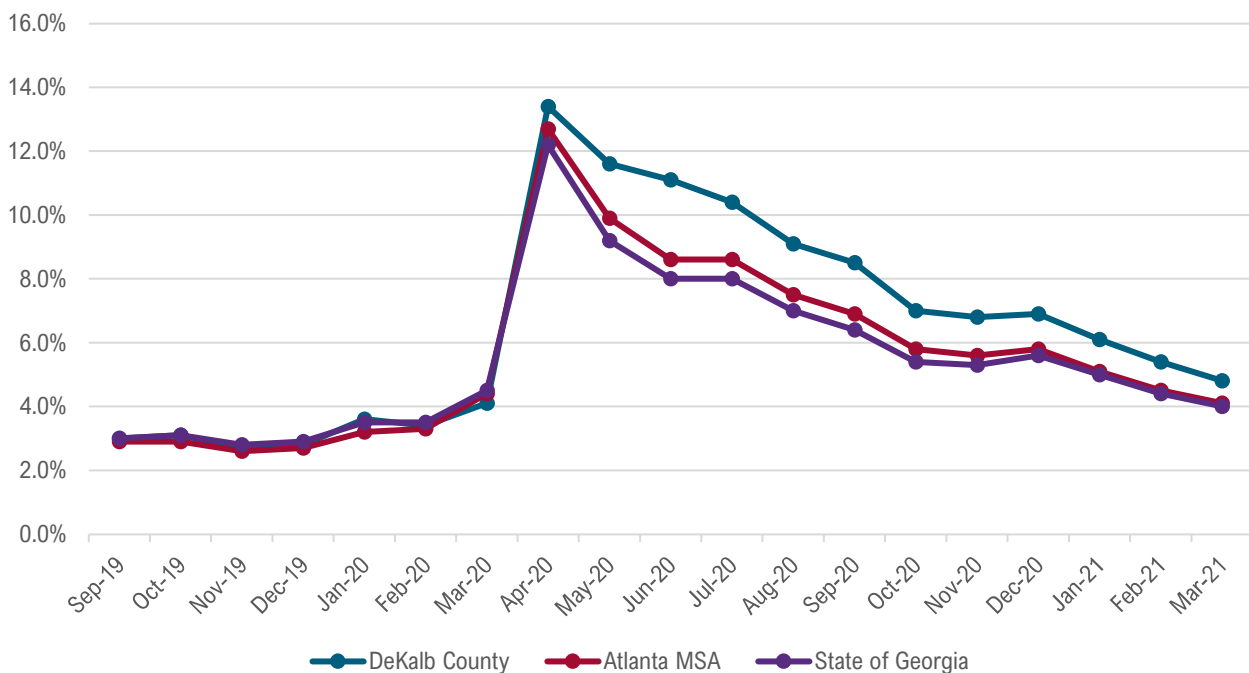
The DeKalb County Economic Strategic Plan indicates five target area industries of logistics and distribution; corporate headquarters and business operations; advanced manufacturing; healthcare and life sciences; and film, arts, and entertainment. These target industries have overlap and differences when compared to the current top five industries in DeKalb which include Healthcare, Educational Services, Retail Trade, Accommodation and Food Services, and Administrative and Waste Services.



**Figure 40. DeKalb County Share of Regional Jobs, 2020**

### Unemployment Rate and Labor Force

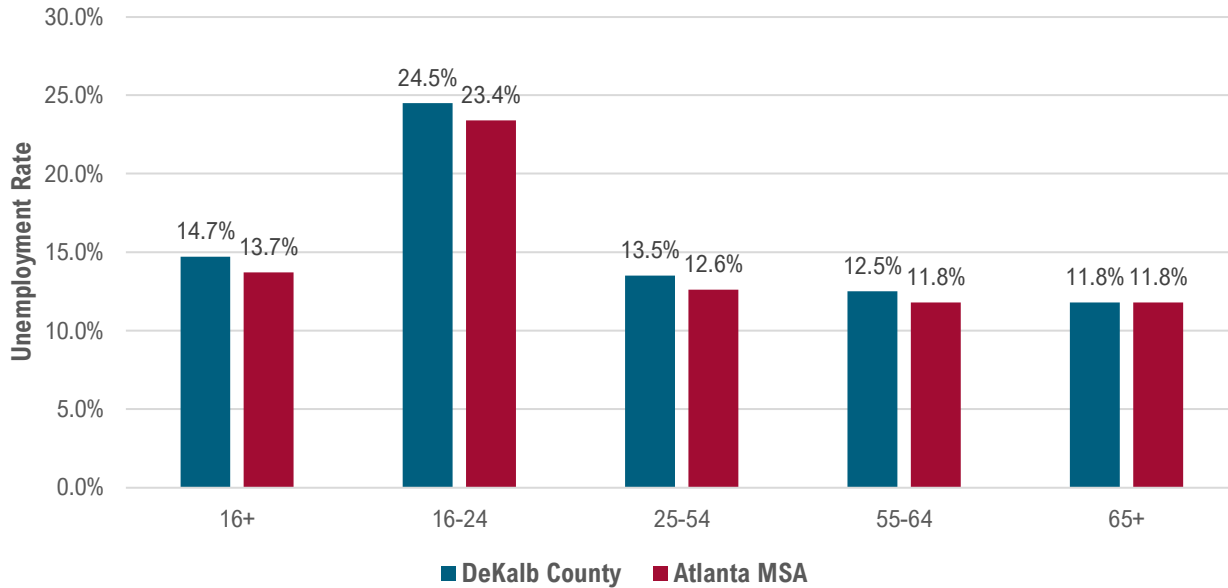
The unemployment rate in DeKalb County was slightly higher than the overall region following recovery from the onset of the COVID-19 pandemic (**Figure 41**). Unemployment in DeKalb County reached 4.8% in March 2021, compared to 4.0% for both the State of Georgia and the Atlanta region. All three geographies peaked in April 2020 following wide-spread stay at home orders.



**Figure 41. Comparison of Unemployment Rate Trends, 2019-2021**

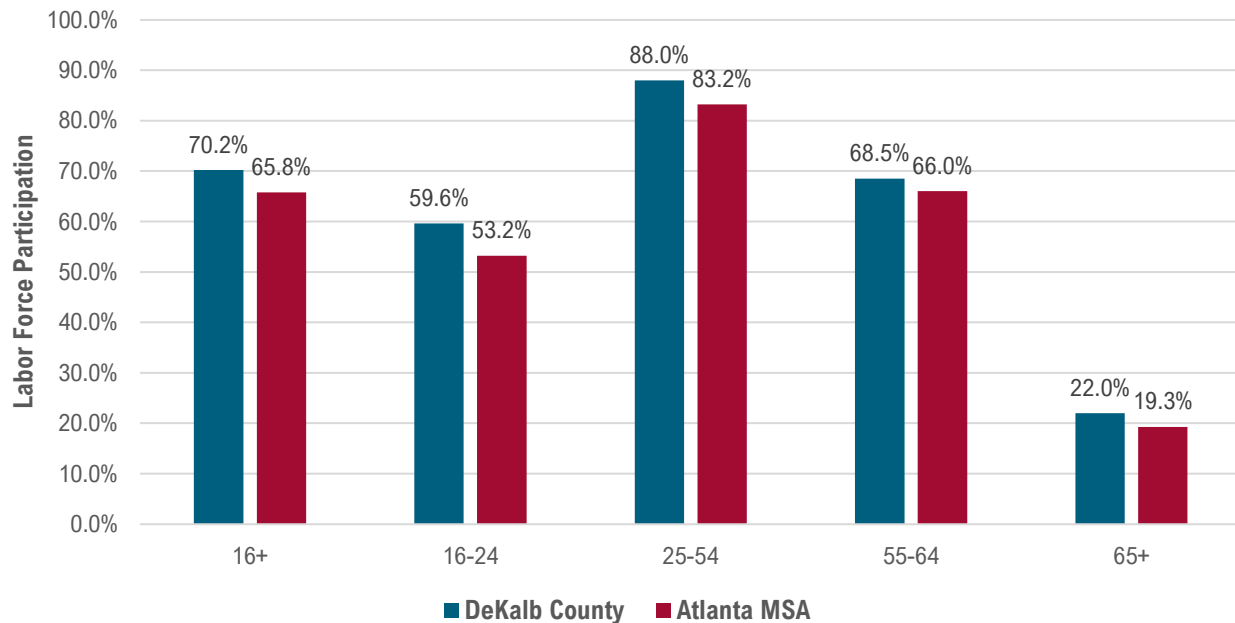


Based on data provided by Environmental Science Research Institute (ESRI), unemployment was highest among DeKalb County residents between 16 and 24 years old. This is a common trend nationally, as this age cohort is typically still in school and often not seeking full-time employment options. Among people aged 25-54, unemployment in DeKalb County was 13.4% in 2020 (**Figure 42**). For all age cohorts, unemployment was higher in DeKalb County when compared to the region except for the 65+ age bracket.

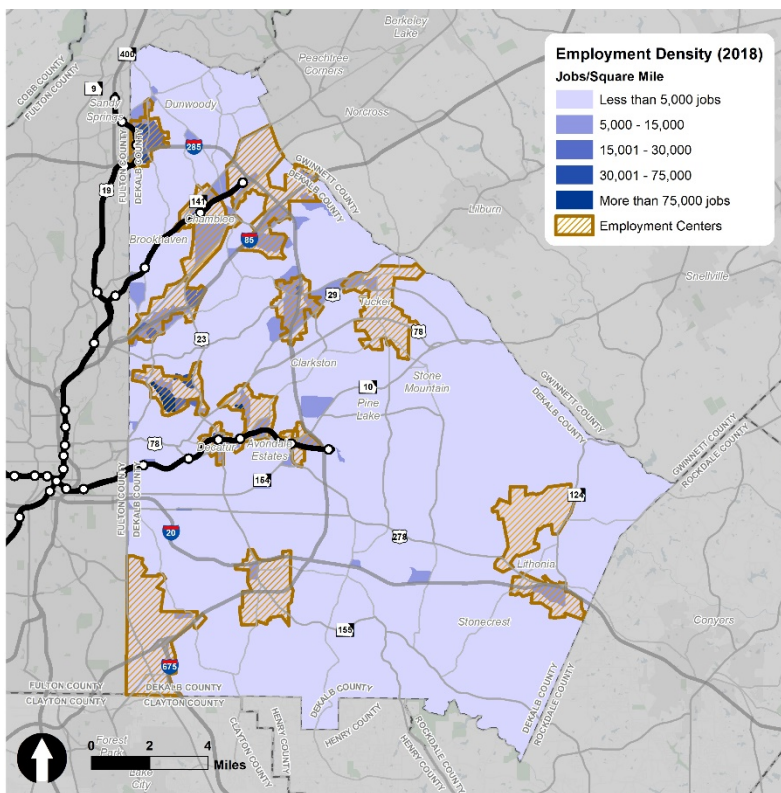


**Figure 42. Unemployment by Age Group, 2020**

Labor force participation was higher in DeKalb County than it was in the Atlanta MSA in 2020 (**Figure 43**). Among 25-54-year-olds, the age cohort that typically has the highest participation rates, DeKalb County residents were estimated at 88%, compared to the Atlanta MSA participation rate of 83.2%.



**Figure 43. Labor Force Participation by Age Group, 2020**



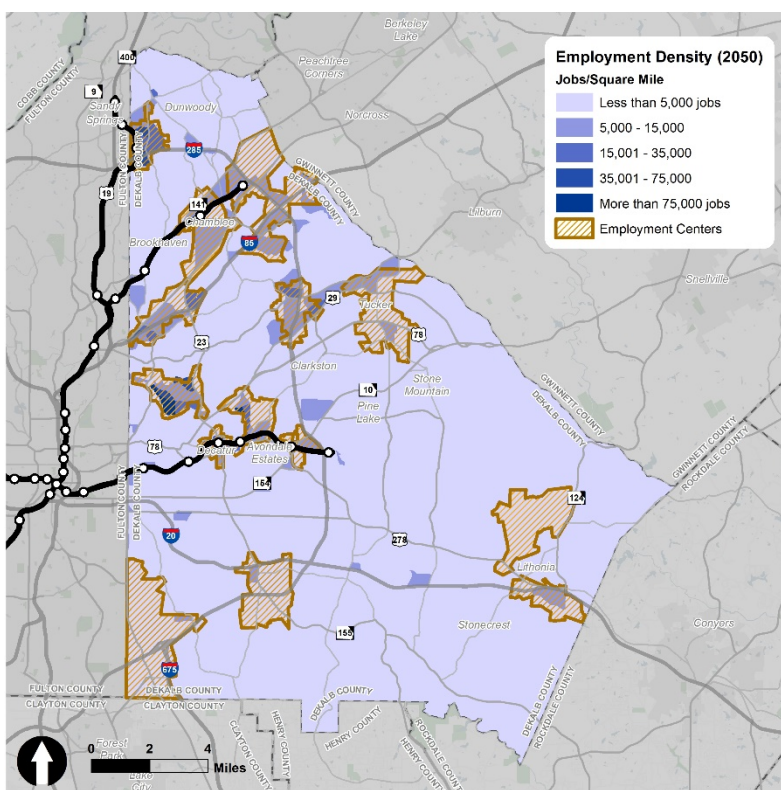
**Figure 44. Employment Density in 2018**

**Figure 44** and **Figure 45** show employment density in 2018 and 2050, respectively as well as identified employment centers. Employment concentrations are expected to have a similar distribution between the two time periods, with higher concentrations being found near existing job centers, in areas with access to retail services and amenities, and likely offer a wide variety of housing options. Most locations with higher concentration of jobs are found in the northern and western areas of the County. The figures illustrate that while existing job centers may grow in the future, no new job centers are anticipated to develop in the County without significant public intervention or investment.

However, there are numerous commercial corridors and aging retail centers that could present opportunities for reinvestment or the development of smaller, local job centers in the county, particularly in central and southern portions of the county. Numerous Activity Centers, LCI's, and CID's are located in these areas, and efforts should be made to leverage those key locations with the greatest potential to support the creation of new employment.

There is also somewhat of a spatial mismatch between job concentrations and residential development, which is more evenly developed across the County. This creates a need for higher levels of commuting and leads to greater levels of congestion. With housing development continuing to be widespread across the county, access to the existing centers and increased congestion will both need to be addressed.

The DeKalb County Economic Strategic Plan identified 14 employment centers within the incorporated and unincorporated areas of the County. The largest employers and highest concentration of jobs are located in five areas around Decatur, Emory University, North Druid Hills, Northlake, and Perimeter Center.

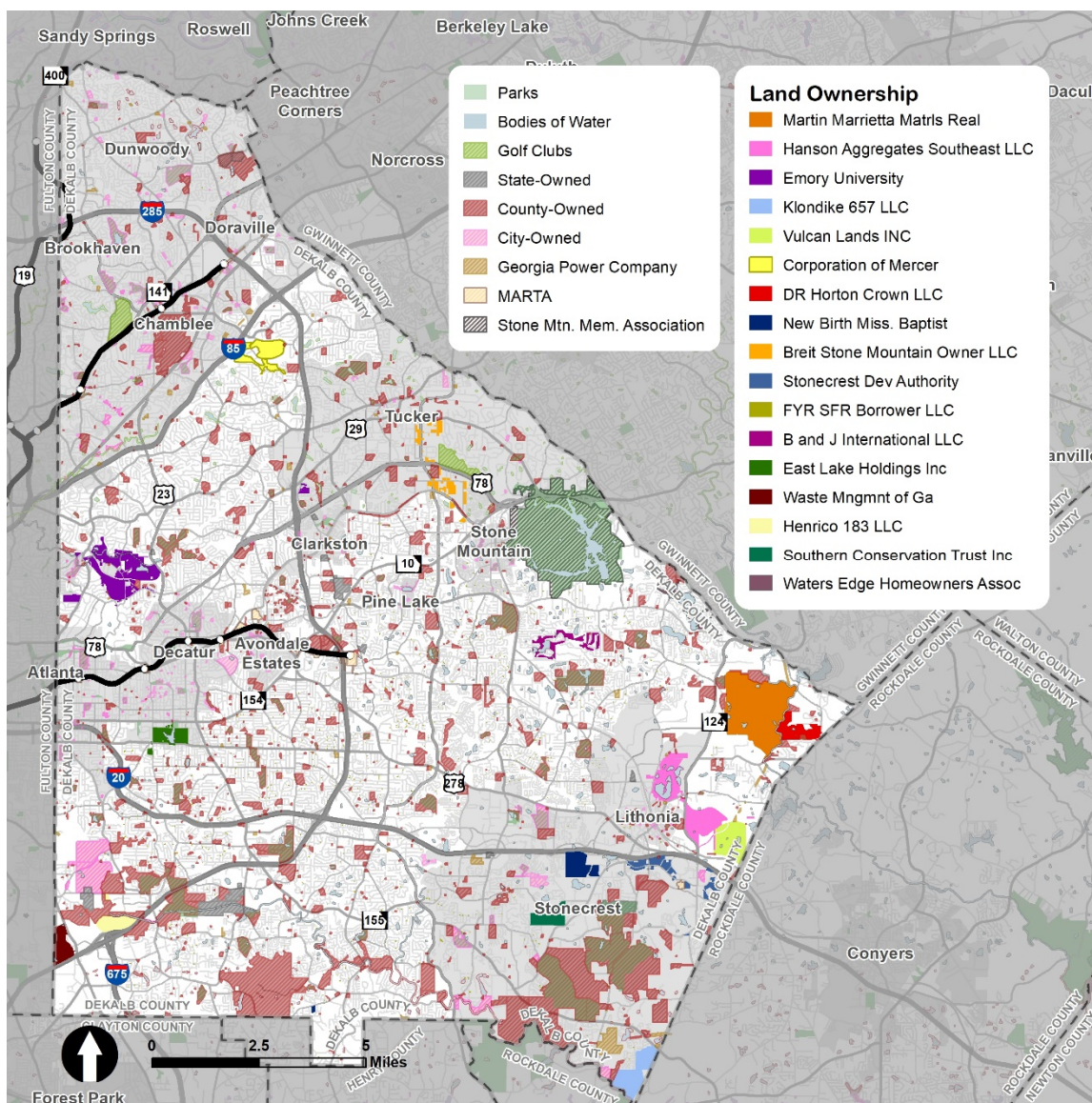


**Figure 45. Employment Density in 2050**



## LAND OWNERSHIP

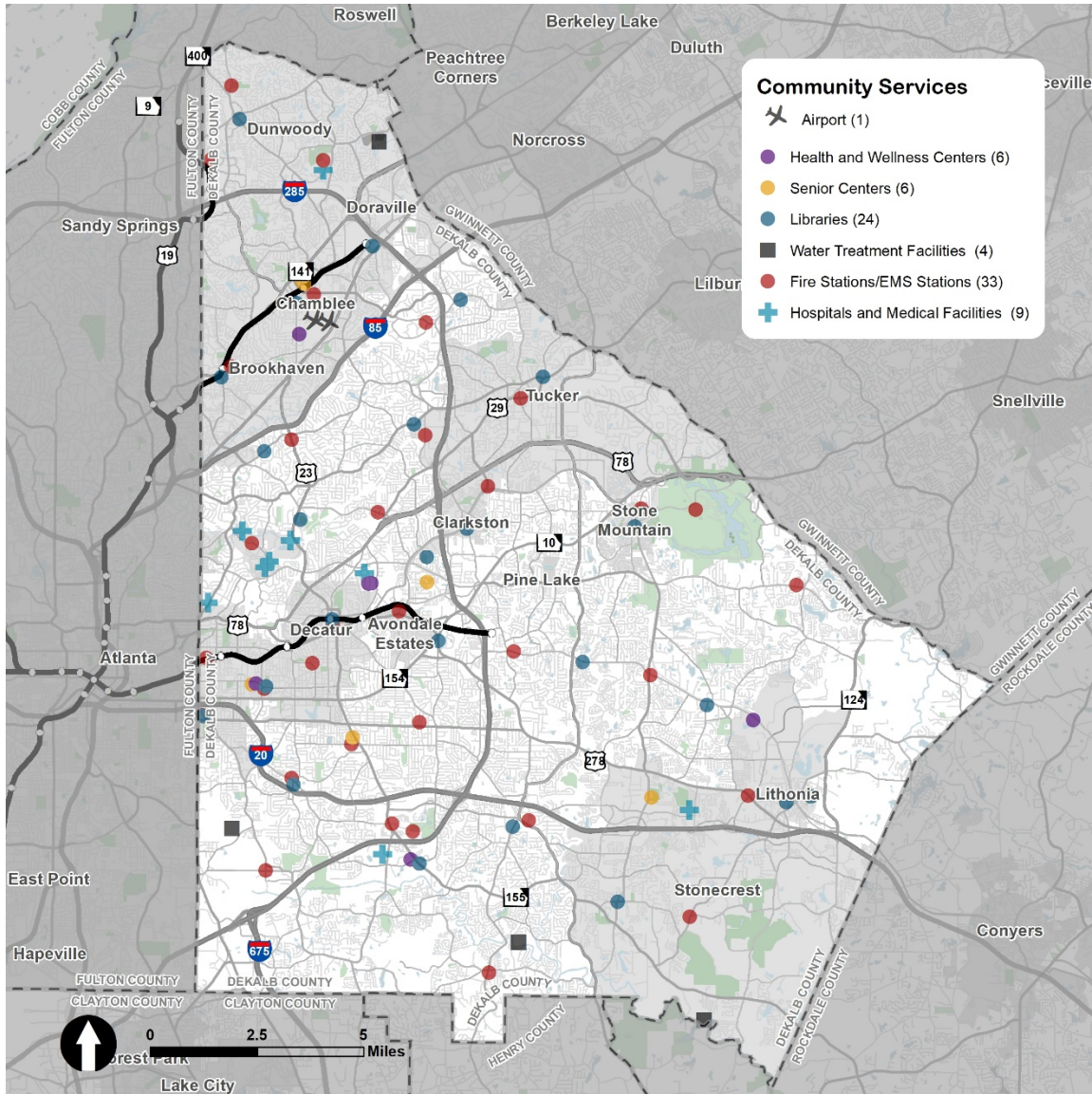
The map below shows large tracts of property owned by a single owner or entity and 250 or more acres. Not shown on **Figure 46** are smaller properties, including single-family parcels, that comprise a large portion of the County. The County and DeKalb Board of Education own the largest total acreages at 14,970 acres and 4,104 acres, respectively. Other large tracts ranging from approximately 400 acres to 1000 acres are owned by the Cities of Atlanta and Brookhaven, the State of Georgia, MARTA, Mercer University, and Emory University. Several quarries own sizeable tracts of land in southeast DeKalb, ranging from 500 to more than 2,000 acres. Partnerships with private industry may yield opportunities for additional development or conservation of new greenspace.



**Figure 46. Land Ownership**

## COMMUNITY FACILITIES

Community facilities are located throughout DeKalb County, with a greater number located in areas with higher densities, specifically inside of I-285 as illustrated in **Figure 47**. Community facilities such as community centers, libraries, and senior centers can provide additional opportunities to engage citizens, provide specific County services, host local events or festivals and in some cases, serve as a catalyst for additional public or private investment.

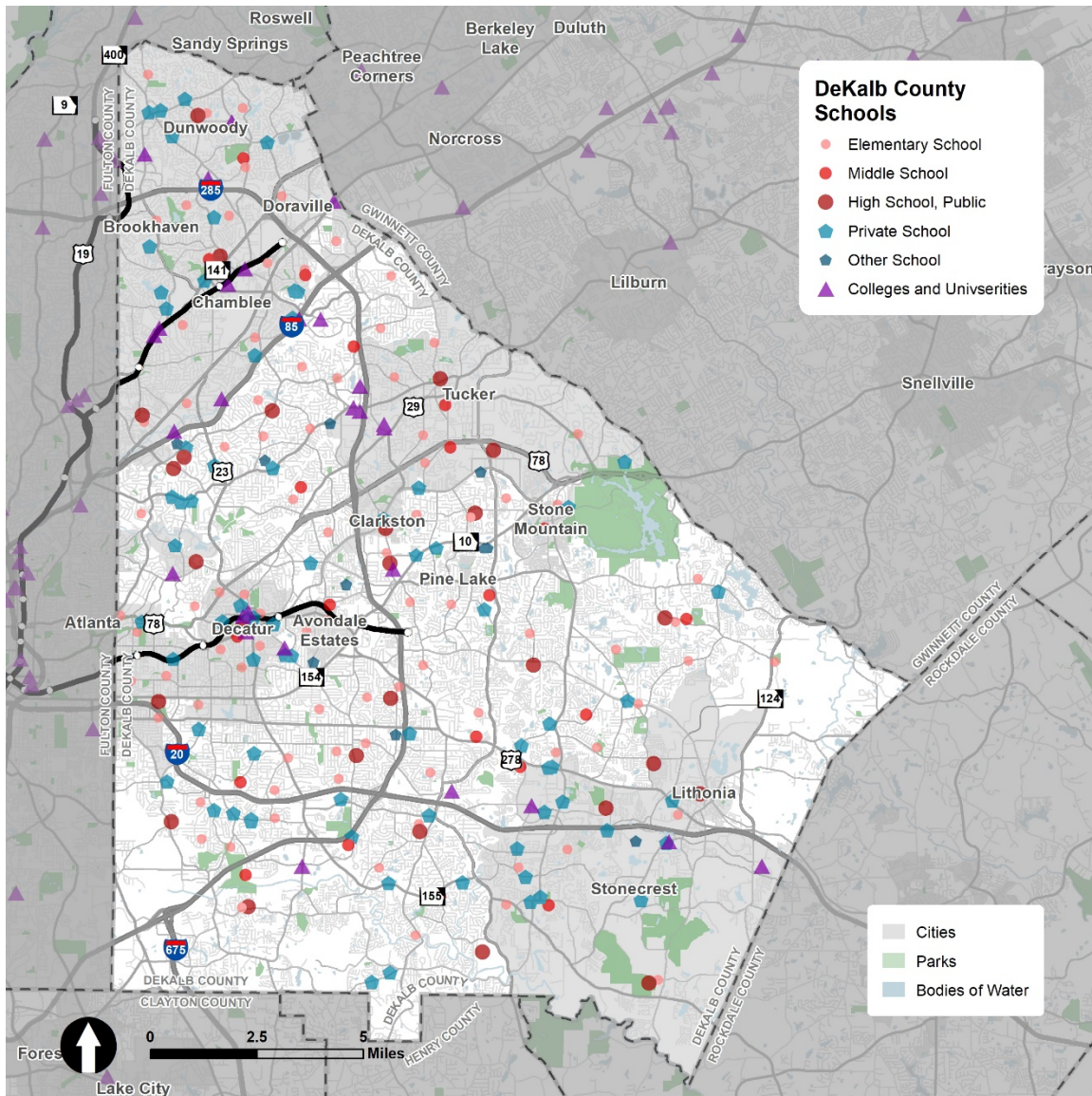


**Figure 47. Community Services**



## EDUCATIONAL FACILITIES

Elementary, Middle, and High Schools are located throughout DeKalb County. The DeKalb County School Board is currently updating its facilities master plan to determine future needs and identify uses for surplus property. There are several colleges and universities located within DeKalb County, however, these are located mostly in central and northern areas of the County. Notable colleges and universities include Emory University, Georgia State University, Agnes Scott College, and Mercer University (**Figure 48**).



**Figure 48. DeKalb County Schools**

## PARKS AND RECREATION

Public parks and open spaces play a significant role in contributing to the quality of life of communities. Much research has shown that parks and open spaces provide a multitude of social, environmental, and economic benefits. These benefits range from providing spaces for the community to come together, socialize, and improve their mental and physical health; to improving water quality, decreasing flooding, and reducing the urban heat island affect; to catalyzing economic development, creating jobs, and diversifying a community's tax base. These and many other benefits underscore the importance of public agencies to 1) consider if they have sufficient parks and open spaces, and 2) if they are equitably distributed throughout the community. The following section explores these two points by conducting the following Level of Service (LOS) analyses:

- **Acreage LOS** – Acreage LOS is used to measure the quantity of parks and open spaces that are available to a community. It measures park acreage as a ratio to the community's population by dividing the number of park acres by the population, divided by 1,000. It is shown as Acres per 1,000 population.
- **Access LOS** – Access LOS is used to measure how well parks are distributed throughout the community. It measures travel distance to parks or individual facilities using the existing roadway or multi-purpose trail network and existing park access points, versus using circles to illustrate "as the crow flies" coverage.

### Park Acreage LOS

Public parks and open spaces in DeKalb County are provided by multiple agencies, including:

- DeKalb County Recreation, Parks, and Cultural Affairs Department (DCRPCA)
- Municipal park and recreation departments
- The State of Georgia (Stone Mountain) and Georgia Department of Natural Resources (Vaughter's Farm)

Based on data collected from the DCRPCA, municipalities, and the Atlanta Regional Commission (ARC), there are approximately 10,000 acres of public parks and greenspaces in DeKalb County. However, just two parks—Stone Mountain (3,193 acres) and Davidson-Arabia Mountain Nature Preserve (2,574 acres) account for about half of that total. Both of these parks are popular attractions which provide the County unique amenities. But they serve a different role than traditional neighborhood and community parks, which typically provide playgrounds, picnic areas, and sports fields for nearby residents.

Based on the data collected, **Table 5** below depicts park acreage at four different levels:

- DCRPCA (excluding Davidson-Arabia Mountain Nature Preserve) – parks provided by the County, primarily in unincorporated areas, excluding the Davidson-Arabia Mountain Nature Preserve (D-AMNP)
- DCRPCA – all parks provided by the County, including D-AMNP
- DCRPCA + Municipal Parks – all parks provided by the County plus all parks provided by incorporated municipalities
- DCRPCA + Municipal Parks + State Parks + Other – all parks provided by the County plus all parks provided by incorporated municipalities plus all parks owned and managed by the State plus County-owned public golf courses in private management and publicly-accessible conservation areas

This data was then combined with population data obtained from the US Census to calculate Acreage LOS at the County and Commission District (CD) level.

	DeKalb County	CD1	CD2	CD3	CD4	CD5
<b>Population (2019)</b>	<b>749,323</b>	149,872	147,393	146,087	154,964	151,007
<b>DCRPCA Parks</b> (excludes Davidson-Arabia NP)	<b>1,917.02</b>	21.82	299.98	918.67	380.80	295.75
<b>LOS - DCPR Parks</b> (excludes Davidson-Arabia NP)	<b>2.6</b>	0.1	2.0	6.3	2.5	2.0
<b>DCRPCA Parks</b>	<b>4,491.46</b>	21.82	299.98	918.67	380.80	2,870.21
<b>LOS - DCPR Parks</b>	<b>6.0</b>	0.1	2.0	6.3	2.5	19.0
<b>DCRPCA Parks + Municipal Parks</b>	<b>6010.72</b>	605.46	606.97	979.07	555.18	3264.07
<b>LOS - DCPR Parks + Municipal Parks</b>	<b>8.0</b>	4.0	4.1	6.7	3.6	21.6
<b>DCRPCA + Municipal + State Parks</b> (Stone Mountain + Vaughter's Farm)	<b>10,517.58</b>	605.46	638.80	1,698.35	3,748.66	3,826.32
<b>LOS - DCRPCA + Municipal + State Parks</b> (Stone Mountain + Vaughter's Farm)	<b>14.0</b>	4.0	4.3	11.6	24.2	25.3

**Table 5. Park Acreage**

\* Population Source: US Census – 2019 American Community Survey 5-year Estimates

^ Acreage Source: DCRPCA, Atlanta Regional Commission, Cities of Atlanta, Avondale Estates, Brookhaven, Chamblee, Clarkston, Decatur, Doraville, Dunwoody, Lithonia, Stone Mountain, Stonecrest, Tucker

The table illustrates that when including all parks, the County's Acreage LOS of 14 Acres per 1,000 population is similar to nearby jurisdictions (City of Atlanta's Acreage LOS is 10.9, Gwinnett County is 14.4) and higher than the National Recreation and Park Association (NRPA) nationwide benchmark median of 10.9 acres per 1,000 population for agencies of a similar population. However, when excluding Stone Mountain and the Davidson-Arabia Mountain Nature Preserve, the County's overall Acreage Level of Service falls to 8.0, which is lower than nearby municipalities and the NRPA nationwide benchmark median. Based on DeKalb County's Acreage LOS, this may suggest a need for additional park land in the County. This would be informed by the County's on-going Parks and Recreation Master Plan, which is not currently available for review.

The table also demonstrates the variability of park provision between Commission Districts and the significant impact of the two large parks. Commissioner Districts 1-3 all have an Acreage LOS below 7 Acres per 1,000 population, which may suggest a need for additional park land in those Districts. On the other hand, Districts 4 and 5 have an Acreage LOS of 22 Acres per 1,000 population, which may suggest a surplus of park land in those areas; albeit perhaps not well distributed in the districts. If DeKalb County has established a target Acreage LOS per Commission District, this may suggest a varying need of park land per Commission District. This would be informed by the County's on-going Parks and Recreation Master Plan, which is not currently available for review.

## Park Access LOS

While park Acreage LOS measures the quantity of park land available in the community, park Access LOS measures how well parks are equitably distributed throughout the community. In many American cities and densely populated areas, access to a park within a 10-minute walk—or roughly  $\frac{1}{2}$  mile—has become a widely accepted standard. However, in lower density suburban areas, like most of DeKalb, providing a park within a 10-minute walk can be a challenge due to the number of parks that this would require and the costs of purchasing and maintaining park land to provide that level of service. That is why some communities have taken a contextual land use approach to park access. This approach suggests that parks located in high density areas, should have shorter park access distances, such as  $\frac{1}{2}$  mile. Parks located in low density areas on the other hand, could have longer park access distances, such as 1 mile. This is particularly the case for neighborhood or local serving parks as well as large parks, such as community and/or regional parks that may also function as neighborhood or local serving parks for residents living near them.

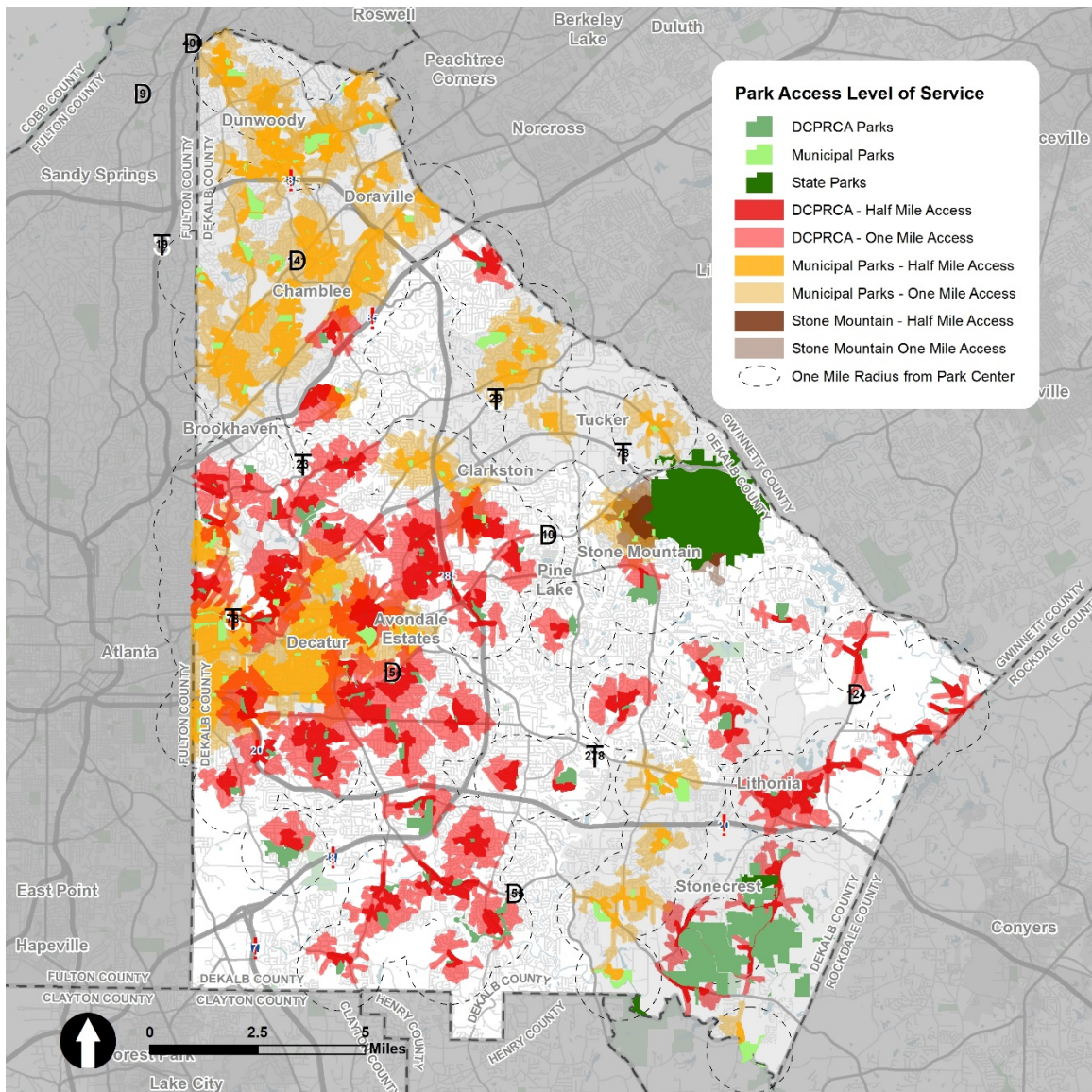
Large parks, such as community and regional parks however, also typically include a wide variety and quantity of facilities and amenities that often draw visitors from across the jurisdiction. Because of this draw, these parks typically have a park access distance of 3, 5, or 7 miles depending on the municipality. For the purposes of this analysis, all parks over 20 acres were considered to be large parks since specific park classification data was not available.

Based on these considerations, Access LOS analyses were completed for parks in DeKalb County based on the following parameters and illustrated in **Figure 49** to **Figure 51**.

- **Figure 49** – DCRPCA (excluding Davidson Arabia Mountain NP) + Municipal Parks –  $\frac{1}{2}$  mile and 1 mile
- **Figure 50** – DCRPCA + Municipal Parks + State Parks –  $\frac{1}{2}$  mile, 1 mile
- **Figure 51** – All Large Parks (>20 acres) including Davidson-Arabia Mountain NP + Stone Mountain – 2 miles, 3 miles, and 5 miles



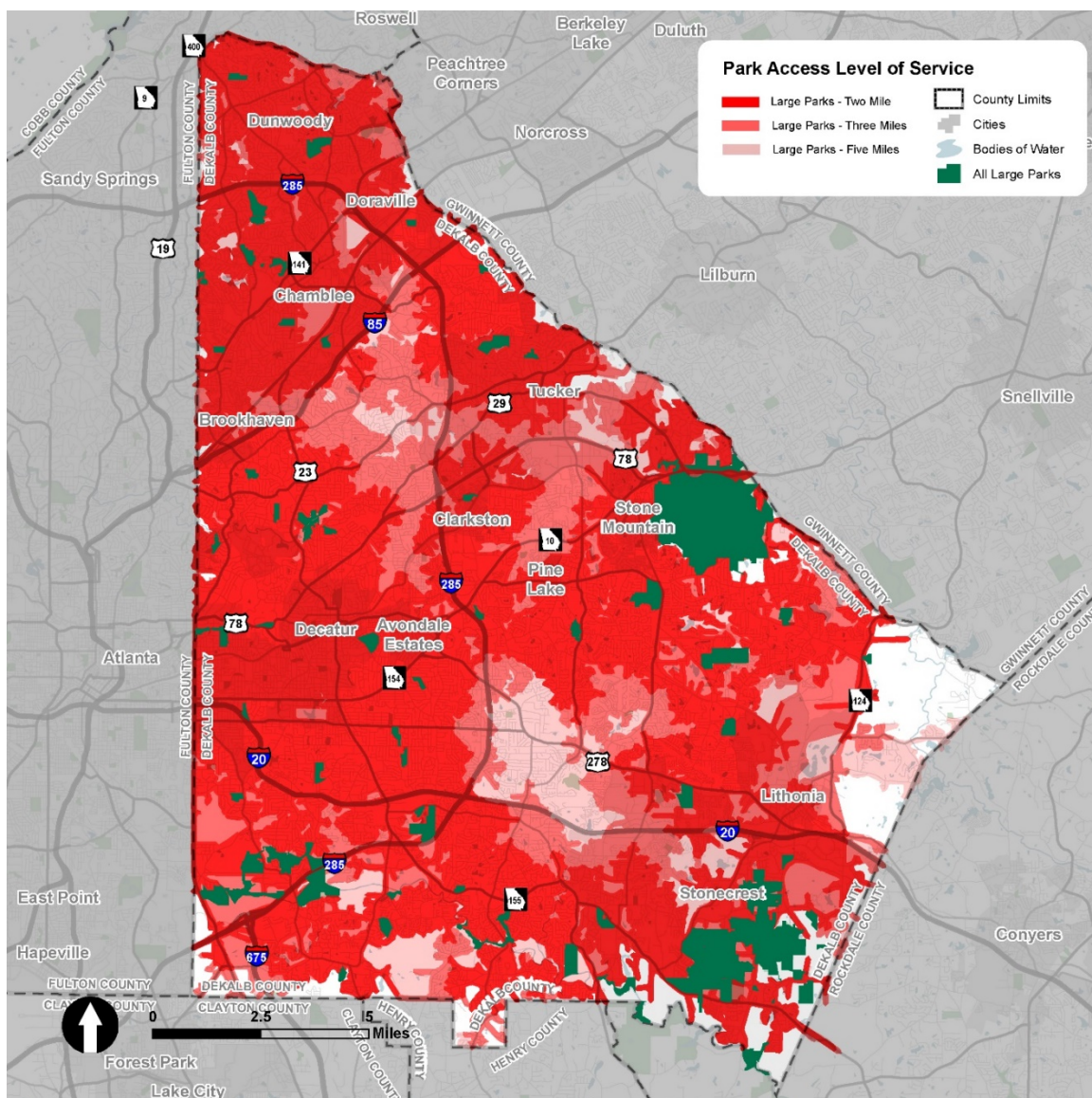




**Figure 50. DCRPCA + Municipal Parks + State Parks – ½ mile, 1 mile**

These analyses suggest that, based on the type of park and the Access LOS distances used, DeKalb County may have varying needs for parks throughout the County. For example, if we consider that all parks throughout the County have the potential to serve as local, neighborhood parks with an Access LOS distance of ½ mile or 1 mile, there appears to be a need for more neighborhood or local serving parks in many areas throughout the County as illustrated in **Figure 49** and **Figure 50**. However, if we consider only larger parks in the County with Access LOS of 3, 5, and 7-miles, there appears to be less of a need, as illustrated in **Figure 51**. These needs appear to be focused in central and eastern DeKalb County.





**Figure 51. All Large (>20 acre) Parks - 2 miles, 3 miles, 5 miles**

## Parks and Recreation Summary

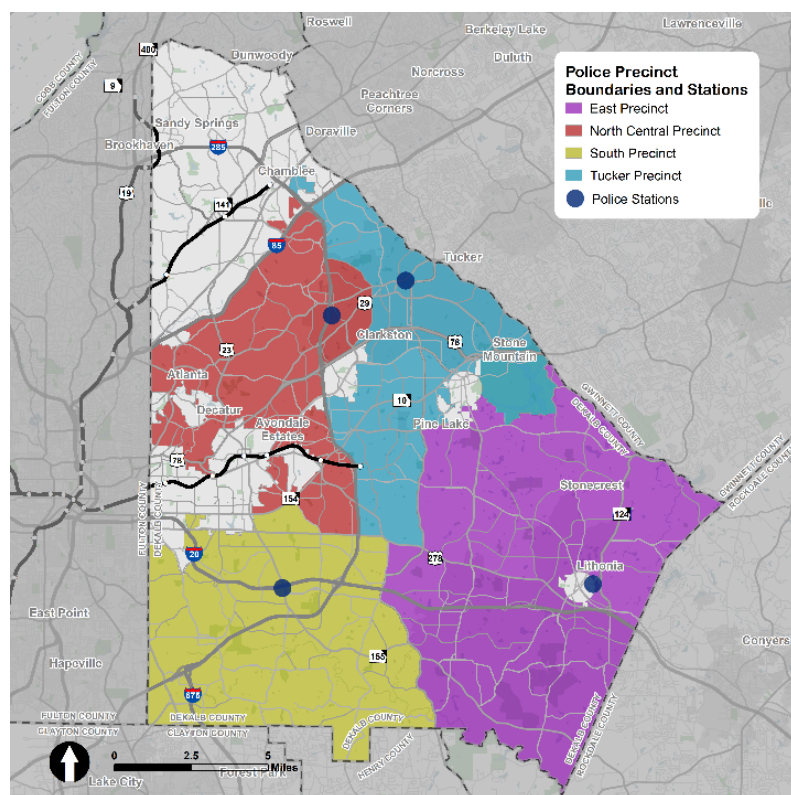
These findings suggest that, based on the comparison of the County's existing Acreage LOS to nearby communities and national benchmarks, the County may have a need for additional park land.

When considering this park land need in the context of Park Access LOS, it appears that this park land need may be focused around more neighborhood or local serving parks versus with large community serving parks in key areas in the County. Moving forward, it will be important to consider these findings and potential recommendations within the context of:

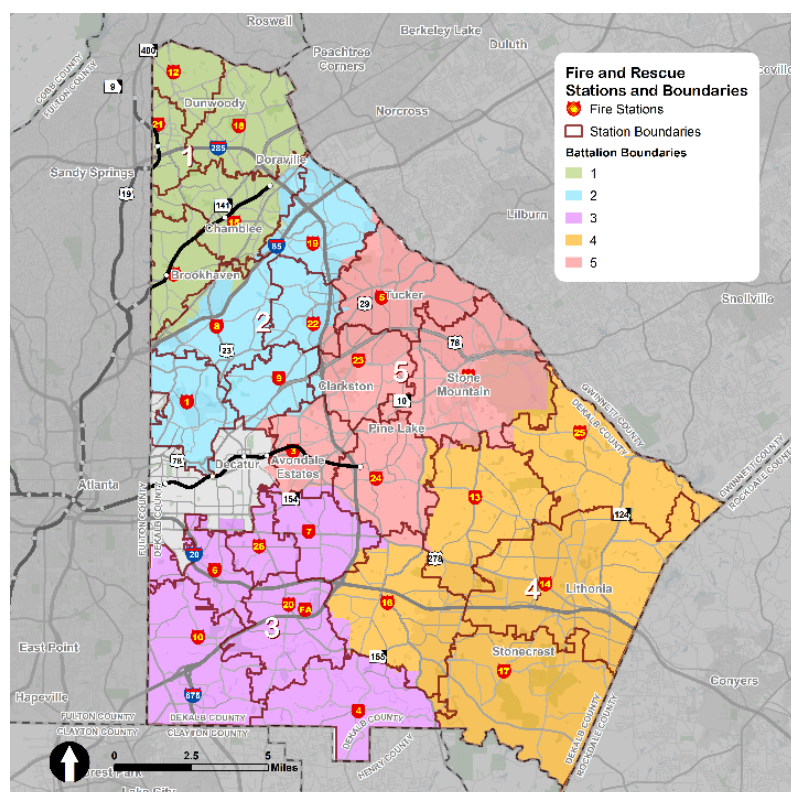
- The findings and recommendations discussed in the County's on-going Parks and Recreation Master Plan, which is not currently available for review.
- Other Land Use recommendations related to mobility in the County; and
- Potential to address multiple social, economic, and environmental needs



## PUBLIC SAFETY



**Figure 52. Police Stations and Boundaries**



**Figure 53. Fire Rescue Stations and Boundaries**

As can be seen in **Figure 52** and **Figure 53**, DeKalb Fire and Rescue stations are located throughout the County and provide services to Unincorporated DeKalb and all cities within DeKalb except the City of Atlanta and the City of Decatur. While the map shows complete coverage within the DeKalb Fire and Rescue service area, there are locations that may present access challenges including structurally deficient bridges or areas that may require emergency vehicles to travel long distances and, in some cases, travel outside of DeKalb County. The four DeKalb Police stations are located within the corresponding boundaries of their precincts. At present, DeKalb Police provide services within the unincorporated area as well as the City of Tucker and the City of Stonecrest. Coordination between land use planning, transportation planning and emergency services is important for many reasons. This includes the impacts of new development within eastern and southern DeKalb as well as redevelopment and increased density within central and northern DeKalb that may require new or additional services. Additionally, roads, bridges, and trails throughout the County may have structural or access issues that hinder emergency response. These issues should be considered and discussed during the planning phase, rather than the approval or construction phases.



## ARTS AND CULTURAL RESOURCES

Although DeKalb is not home to any National Historic Landmarks (NHLs), there are 56 districts, buildings, or sites in the County on the National Register of Historic Places (NRHP). **Table 6** below lists each of these NRHP locations, with details about when the property was listed, the significance of the place, the type of place (building, district, or site), and the type of significance (local, state, or national).

**Table 6. National Register of Historic Places in DeKalb as of 6/17/2021**

Property Name	City	Street & Number	Listed Date	Reason for Significance	Bldg., Dist., or Site	Significance		
						Local	State	National
Oglethorpe University Historic District	Atlanta	4484 Peachtree Rd. NE.	8/6/1994	Architecture; Education; Landscape Architecture; Social History	D			●
Farmer, Neville and Helen, Lustron House	Decatur	513 Drexel Ave.	3/18/1996	Architecture; Engineering	B	●	●	●
Druid Hills Historic District	Atlanta	U.S. 29	10/25/1979	Community Planning and Development; Landscape Architecture; Architecture	D			●
Druid Hills Parks and Parkways	Atlanta and vicinity	Both sides of Ponce de Leon Ave. between Briarcliff Rd. and the Seaboard Coast Line RR tracks	4/11/1975	Community Planning and Development; Landscape Architecture; Architecture; Social History	D			●
Avondale Estates Historic District	Avondale Estates	Roughly bounded by Avondale Rd., Lakeshore Dr., Kingstone, Clarendon, and Fairchild Dr., also Lake Avondale	12/8/1986	Community Planning and Development; Landscape Architecture; Commerce; Architecture	D			●
Emory University District	Atlanta	N. Decatur Rd.	11/20/1975	Community Planning and Development; Landscape Architecture; Education; Architecture; Religion; Social History	D			●
Scottish Rite Hospital for Crippled Children (Boundary Decrease)	Decatur	321 W. Hill St.	9/4/2004	Health/Medicine; Architecture	B			●
Soapstone Ridge	Atlanta	Address Restricted	5/7/1973	Prehistoric	S			●
Old DeKalb County Courthouse	Decatur	Court Sq.	8/26/1971	Architecture	B		●	
Pearce, William and Minnie, House	Decatur	125 Madison Ave.	1/27/2012	Architecture	B	●		
Smith-Benning House	Atlanta	520 Oakdale Rd., NE	6/28/1982	Architecture	B	●		
Steele-Cobb House	Decatur	2632 Fox Hills Dr.	6/17/1982	Architecture	B	●		
Blair-Rutland Building	Decatur	215 Church St.	12/12/2002	Architecture; Commerce	B	●	●	
Zuber-Jarrell House	Atlanta	810 Flat Shoals Ave., SE	9/30/1997	Architecture; Commerce	B	●		
Stone Mountain Historic District	Stone Mountain	Roughly bounded by Stone Mountain Cemetery, Stone Mountain Memorial Park, Lucie St. CSX RR, VFW Dr., and Stone Mtn City	12/7/2000	Architecture; Commerce; Community Planning and Development; Black; Entertainment/Recreation; Transportation	D		●	
Decatur Downtown Historic District	Decatur	Roughly bounded by N. McDonough St., E. Howard Ave., Hillyer & Commercial Sts., & E. Ponce De Leon Ave.	5/23/2012	Architecture; Commerce; Community Planning and Development; Politics/Government; Transportation	D	●		
Candler Park Historic District (Boundary Increase)	Atlanta	Roughly bounded by Moreland Ave., Freedom Pkwy., Harold Ave., Matthews St., and DeKalb Ave.	3/17/2005	Architecture; Community Planning and Development	D	●		
Cheek-Spruill House	Dunwoody	5455 Chamblee--Dunwoody Rd.	6/9/2000	Architecture; Community Planning and Development	B	●		
Decatur Heights-Glenwood Estates-Sycamore Street Historic District	Decatur	Roughly Bounded by Forkner Dr., Sycamore Dr., Sycamore St., and the E. boundary of Decatur Cemetery	6/21/2016	Architecture; Community Planning and Development	D	●		
Klondike Historic District	Klondike	Klondike and S. Goddard Rds.	9/27/2007	Architecture; Community Planning and Development	D	●		
McDonough-Adams-Kings Highway Historic District	Decatur	Bounded by W. College Ave., Kings Hwy., Oakview Rd. & McDonough St.	12/24/2013	Architecture; Community Planning and Development	D	●		



Property Name	City	Street & Number	Listed Date	Reason for Significance	Bldg., Dist., or Site	Significance		
						Local	State	National
Northcrest Historic District	Doraville	Roughly bounded by Chamblee-Tucker, Northcrest & Pleasantdale Rds.	4/17/2017	Architecture; Community Planning and Development	D	●		
Northwoods Historic District	Doraville	Roughly bounded by Buford Hwy., Chamblee-Tucker & Shallowford Rds., I-85 & I-285	6/2/2014	Architecture; Community Planning and Development	D	●		
Ponce de Leon Court Historic District	Decatur	Ponce de Leon Ct.	11/2/2011	Architecture; Community Planning and Development	B	●		
Ponce de Leon Terrace-Ponce de Leon Heights-Clairmont Estates Historic District	Decatur	Roughly bounded by Ponce de Leon Pl., Scott Blvd., Nelson Ferry Rd., Ponce de Leon & Clairmont Aves.	7/2/2014	Architecture; Community Planning and Development	D	●		
Lithonia Historic District	Lithonia	Centered on jct. of CSX RR. & Main St.	9/19/2016	Architecture; Community Planning and Development; Ethnic Heritage-Black; Ethnic Heritage-European; Industry	D	●		
Briarcliff-Normandy Apartments	Atlanta	Roughly along Briarcliff Rd., Normandy Dr. and Chalmette Dr.	3/26/2003	Architecture; Community Planning and Development; Landscape Architecture	B	●		
Kirkwood Historic District	Atlanta	Roughly bounded by Memorial Dr., Montgomery St., Hosea Williams Dr., Rogers St., CSX RR., & city limits	9/24/2009	Architecture; Community Planning and Development; Social History; Industry; Commerce	D	●		
South Candler Street-Agnes Scott College Historic District	Decatur	Roughly bounded by E. College, S. McDonough, S. Candler, E. Hill and E. Davis Sts.	7/29/1994	Architecture; Education	D		●	
Kirkwood School	Atlanta	138 Kirkwood Rd.	9/19/2002	Architecture; Education; Social History; Black	D	●		
Callanwolde (Boundary Increase)	Atlanta	980 Briarcliff Rd. NE	10/9/2003	Architecture; Landscape Architecture	B		●	
Donaldson-Bannister House and Cemetery	Dunwoody	4831 Chamblee-Dunwoody Rd.	8/9/2009	Architecture; Landscape Architecture	D	●		
Villa Miraflores	Atlanta	1214 Villa Dr.	6/7/2016	Architecture; Landscape Architecture	B <sup>(1)</sup>	●		
Emory Grove Historic District	Decatur	Centered on N. Decatur Rd. bet. the CSX RR and the University Park-Emory Highlands-Emory Estates HD	3/31/2000	Architecture; Landscape Architecture; Community Planning and Development	D	●		
Winnona Park Historic District	Decatur	Roughly bounded by E. College Ave., Avery St., S. Columbia Dr., and Mimosa Dr.	5/30/2002	Architecture; Landscape Architecture; Community Planning and Development	D	●		
Alston, Robert A., House	Atlanta	2420 Alston Dr., SE off Eastlake Rd.	7/14/2004	Architecture; Politics/Government	B		●	
United States Post Office-Decatur, Georgia	Decatur	141 Trinity Place	7/5/2000	Architecture; Politics/Government	B	●		
Bond Family House	Lithonia	1226 Rock Chapel Rd.	9/17/2008	Architecture; Social History	B	●		
Gay, Mary, House	Decatur	716 W. Trinity Pl.	5/6/1975	Architecture; Social History	B	●		
Lee, Agnes, Chapter House of the United Daughters of the Confederacy	Decatur	120 Avery St.	7/25/1985	Architecture; Social History	B		●	
Pythagoras Lodge No. 41, Free and Accepted Masons	Decatur	136 E. Ponce de Leon Ave.	8/19/1982	Architecture; Social History	B	●		
Decatur Cemetery	Decatur	229 Bell St.	5/23/1997	Art; Community Planning and Development; Black; Landscape Architecture	D	●		
Cameron Court District	Atlanta	E of Atlanta at Briarcliff Rd.	9/30/1982	Community Planning and Development; Architecture	D	●		
Candler Park Historic District	Atlanta	Roughly bounded by Moreland, DeKalb, McLendon, and Harold Aves., Mathews St., and Clifton Terr.	9/8/1983	Community Planning and Development; Architecture	D		●	
Longview-Huntley Hills Historic District	Chamblee	Montford, Commodore & Admiral Drs., Shallowford Rd.	3/13/2017	Community Planning and Development; Architecture	D	●		



Property Name	City	Street & Number	Listed Date	Reason for Significance	Bldg., Dist., or Site	Significance		
						Local	State	National
William T. Gentry House	Atlanta	132 E. Lake Dr., SE	5/2/1985	Community Planning and Development; Architecture; Communications	B	●		
University Park-Emory Highlands-Emory Estates Historic District	Decatur	Roughly bounded by N. Decatur Rd., Durand Dr., Peavine Cr., and the Druid Hills Historic District	8/31/1998	Community Planning and Development; Landscape Architecture; Architecture	D	●		
Hampton, Cora Beck, Schoolhouse and House	Decatur	213 Hillyer Pl.	4/16/1992	Education; Architecture	B		●	
Decatur Waterworks	Decatur	1400 McConnell Dr., Mason Mill Park	3/15/2006	Engineering; Entertainment/Recreation; Landscape Architecture; Politics/Government	D	●		
Briarcliff	Atlanta	1260 Briarcliff Rd., NE	8/4/1988	Entertainment/Recreation; Architecture; Social History	D		●	
Fischer, Dr. Luther C. and Lucy Hurt, House	Atlanta	4146 Chamblee Dunwoody Rd.	6/8/2011	Health/Medicine; Architecture	B		●	
DeKalb Avenue-Clifton Road Archeological Site	Atlanta	Address Restricted	12/14/1978	Historic - Non-Aboriginal; Economics; Social History	S		●	
The Seminary	Lithonia	6886 Main St.	11/15/1978	Industry; Education; Architecture	B	●		
Swanton House	Decatur	720 Swanton Way	8/30/1978	Industry; Military; Architecture; Social History	B	●		
Callanwolde	Atlanta	980 Briarcliff Rd., NE	4/23/1973	Landscape Architecture; Architecture	B		●	

**Notes:** <sup>(1)</sup>The location and significance information for Villa MiraFlores was not readily available in the NHRP data.

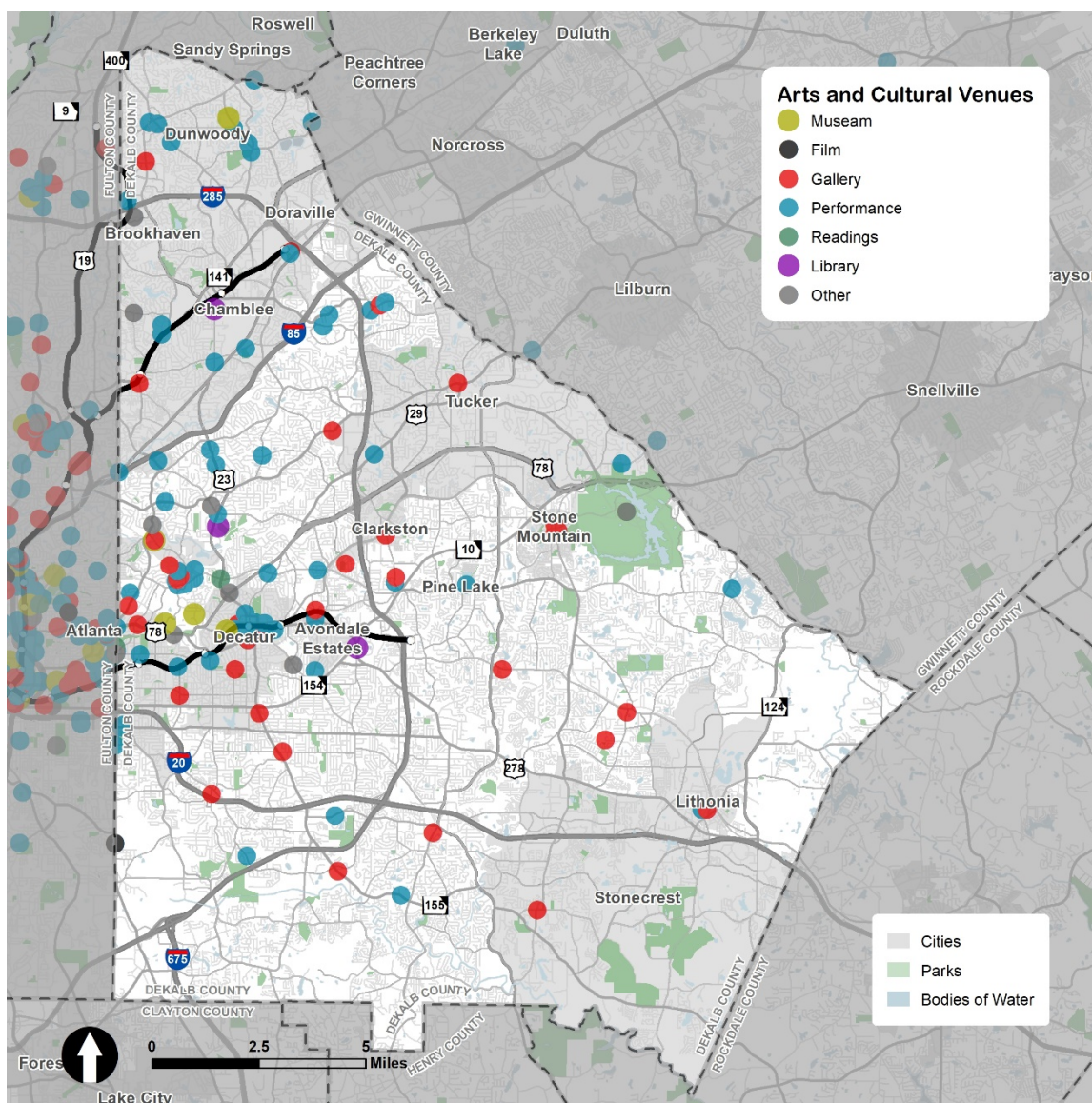
These sites represent some of the diversity of architectural, historical, artistic, and industrial resources that DeKalb County offers. Preserving our local, state, and national history is important for memorializing previous generations as well as providing educational and cultural opportunities for future generations. In addition to pursuing national historic registry designation for projects, frequent review of our cultural resources to evaluate historic preservation efforts should be conducted by DeKalb County, including partnering with relevant community organizations to complete these efforts.

## Art and Cultural Venues

In addition to the NRHP sites, DeKalb also boasts more than 40 arts and cultural sites, organizations, festivals, and institutions, including the Callanwolde Foundation, Fernbank Museum of Natural History, Fernbank Museum of Science, the DeKalb Symphony Orchestra, Emory University, Essential Theatre, Dance 101, Japanfest, Decatur Book Festival, Michael C. Carlos Museum, and the Instituto de Mexico. A diversity of sites or venues that offer a spectrum of artistic and cultural mediums, including performances, readings, exhibits, showings, programs, and festivals, is an indicator of a vibrant arts and culture community.

**Figure 55** illustrates the geographic dispersion of art and cultural venues in DeKalb County, revealing significant concentrations of arts and cultural venues in central west DeKalb, particularly around the City of Decatur and Emory University.

Beyond the geographic dispersion of art and culture sites, additional analyses are needed to determine if the types of venues offer a range of art and cultural representations that is reflective of the DeKalb community. This effort should include assessing if there is adequate representation from the Black community as well as the many other races and ethnicities that make-up the County's demographics. Particular attention should be paid to ensure that buildings, districts, and/or site with prominence in historically underrepresented communities are supported and are included in NRHP listings.



**Figure 55. Arts and Cultural Venues**

In addition to the number of locations and representation of arts and culture resources, future efforts should look beyond the venues themselves to determine if DeKalb County is a place where creative culture can live, work, and play by doing an assessment that determines if there is affordable housing for artists as well as affordable workspace for them. Another consideration is if there is sufficient transportation infrastructure to support multimodal access to the identified Arts and Cultural Venues, including from parts of the County that may have a thriving residential outpost of creatives.

The above-mentioned analysis can be combined with a more focused effort of Arts and Culture in DeKalb, which may result in a formal countywide Arts and Culture Master Plan or at least a focused look at Arts and Culture in DeKalb. This effort should consider collaboration and coherency with the City-driven Arts and Culture and Public Art Master Plans as well as how to provide physical connectivity between locations identified in each of these plans. This effort also should support and collaborate with arts and culture programming in nearby counties as well as the Metro Atlanta region as a whole.

## HEALTH AND WELLNESS

A community's health and wellness are multi-faceted and multi-generational and are strongly linked to the physical environment. For example, the Fulton-DeKalb Hospital Authority provides a public health dashboard, shown in **Figure 56**, that features 17 categories of public health, and within the category of Physical Environment (the one that is most applicable to the DeKalb Unified Plan) almost 50 indicators are listed. These health indicators include a color range to easily compare DeKalb County to other counties in the state.

### Physical Environment



**Figure 56: Fulton-DeKalb Hospital Authority Public Health Dashboard Snapshot**

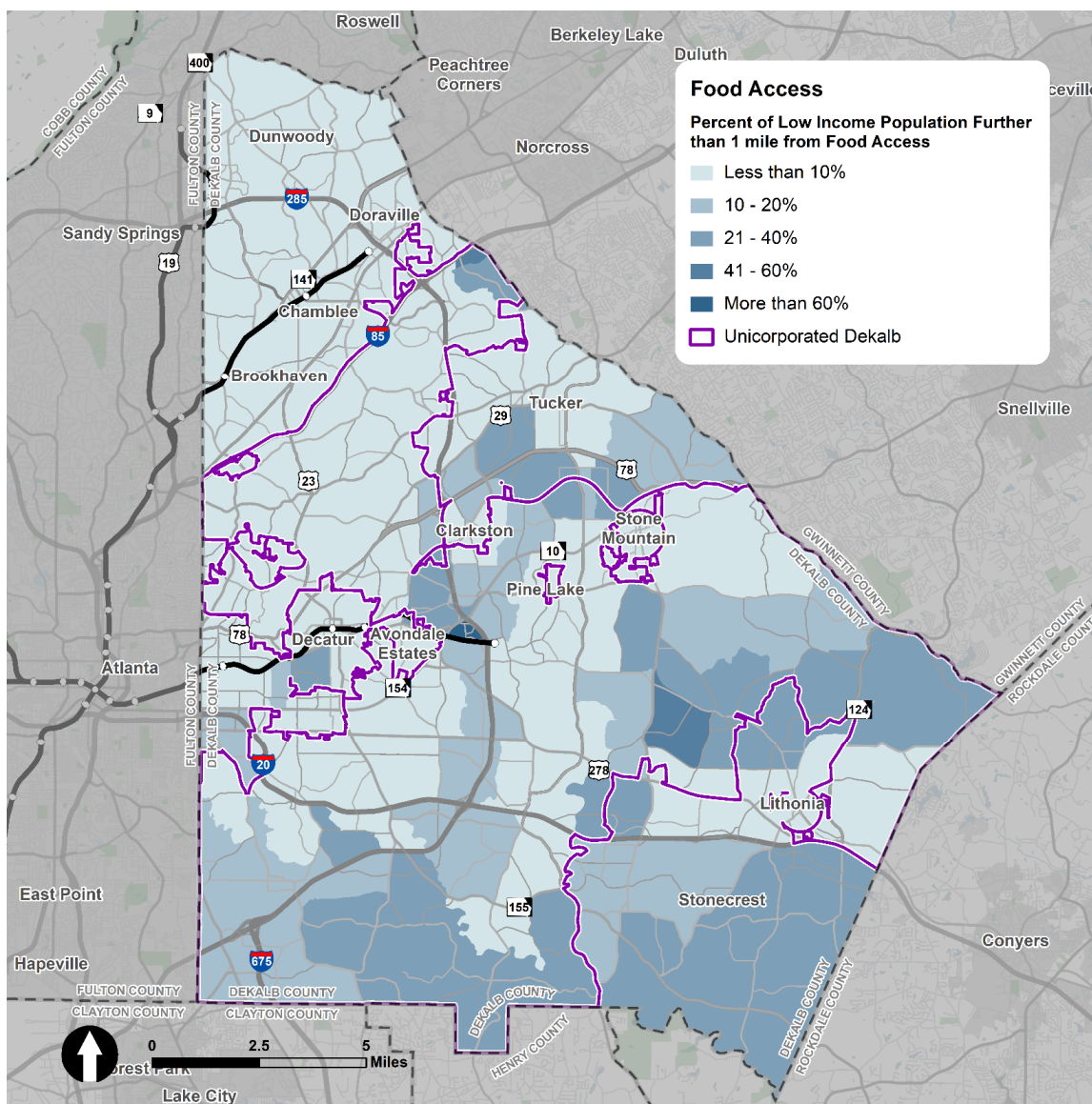
This snapshot of the dashboard merely highlights the depth of data that is utilized by various organizations to understand the health of the community. Various factors have already been addressed in previous sections of this document, such as access to community facilities, parks, and greenspace. Other factors, addressed on the following pages, include access to healthy food and the environmental features that affect access to clean air and clean water.

### Access to Healthy Food

A food desert is a geographic area where access to affordable fresh produce is restricted or nonexistent. In areas where food deserts are present, instances of food insecurity are common. Food insecurity is caused by barriers to food access usually via geographic complications or financial limitations. The Food and Drug Administration (FDA) has determined any home located more than 1 mile from a grocer to have "low-access" to healthy foods. As can be seen in **Figure 57**, some areas considered to have low access to healthy foods correspond with areas of lower population or development density and more dispersed land use patterns. However, some areas in central DeKalb with moderate population or development



density are considered “low-access”. This may be due in part to the lack of supermarket availability in these areas. Initiatives to increase food access in these areas may address several underlying issues facing these communities.



**Figure 57. Food Access**

Organizations within DeKalb County are working to improve access to healthy foods. Roots Down is partnering with the DeKalb County Library system on the Edible Libraries campaign to grow gardens starting at 6 libraries as an initial pilot program in addition to productive urban landscaping at a few area schools. This pilot program also provides education opportunities to grow and cultivate the community. Concrete Jungle, a local non-profit, provides foraging, farming, and support for food access by transforming overlooked and underutilized fruit trees and land into a healthy source for communities in need. Free99Fridge works with local businesses to host a community refrigerator outside of their establishment to be filled with fresh fruits and vegetables to fight hunger while also preventing food waste.



## SUSTAINABILITY

Issues related to sustainability have become increasingly important in recent years. Concerns around sustainability take a variety of forms, from climate change, environmental sustainability, and resource management to community resilience and social equity. Sustainable development, as defined in the 1987 Brundtland Report, refers to development that meets our current needs without hindering the ability of future generations to meet their own needs. Concerns around sustainability are closely intertwined with a related concept sometimes called resilience, defined as the capacity of a system, be it an individual, forest, a city, or an economy, to deal with change and continue to develop. In essence, building communities that are more “resilient” to shocks and disruption.

Building more resilient communities relies upon taking a systemic approach to the challenges they face and integrating sustainable strategies into every facet of community policy. Some communities in the region have begun to proactively craft sustainability initiatives and identify strategies to help build more sustainable and resilient futures; while DeKalb County has begun incorporating sustainable strategies into policy, it has not yet crafted an overarching plan linking these strategies and approaches together as an overarching paradigm. This analysis specifically identifies environmental conditions and environmental impacts from point source pollution, but other elements related to sustainability and resilience include:

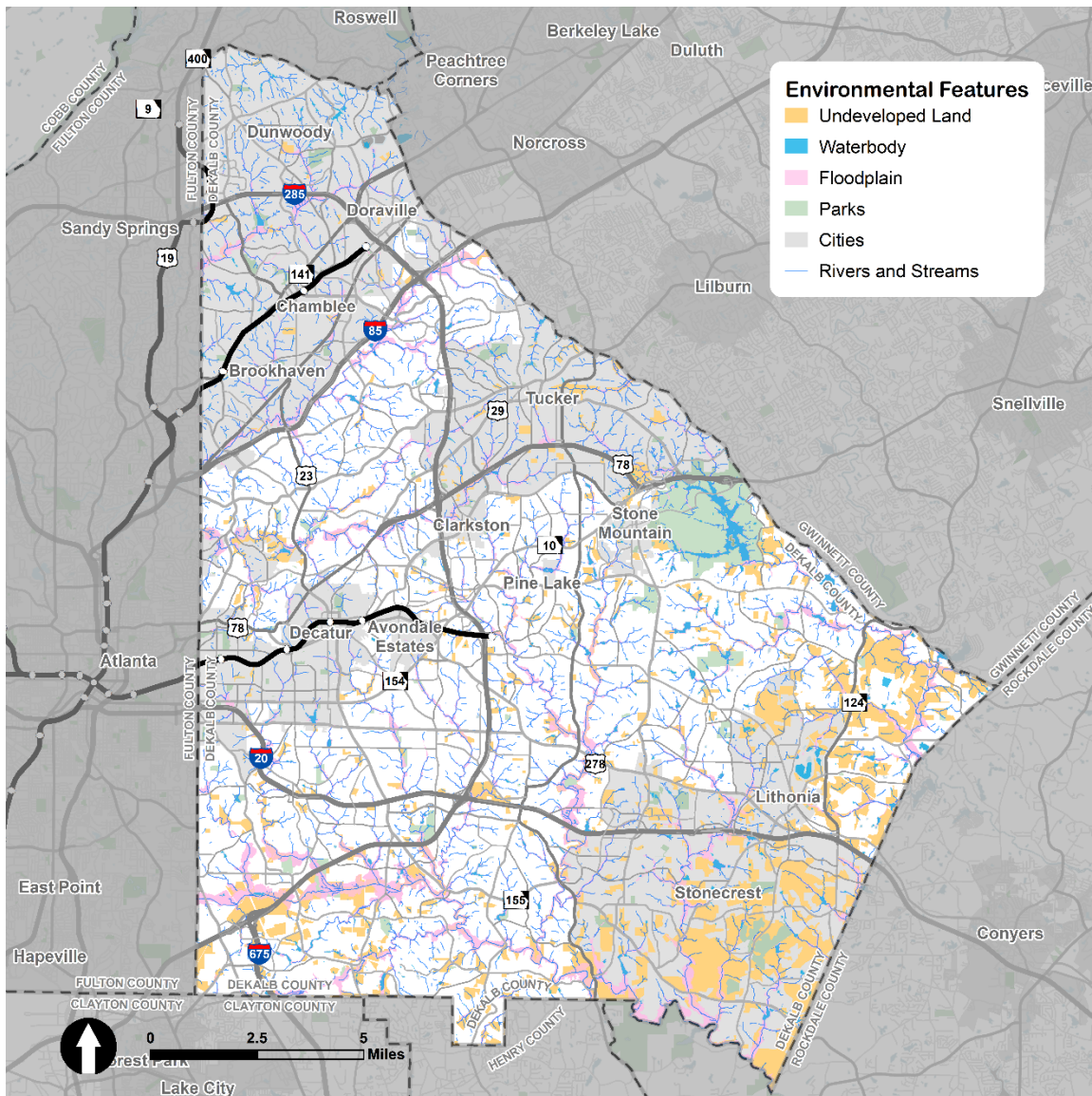
- Land use and zoning
- Housing and development trends
- Parks and recreation
- Health and wellness
- Food access
- Transportation infrastructure

Other items that the County should consider studying from a sustainability perspective include:

- Water usage
- Air quality
- Waste generation and management
- The built environment (community facilities as well as efficiency standards)
- Tree canopy and urban heat islands
- Water quality and drainage infrastructure

## ENVIRONMENTAL FEATURES

As with much of Metro Atlanta, many rivers, creeks, and streams can be found throughout DeKalb County. Many areas adjacent to major water features, lie within flood plains and are more susceptible to flooding. The County is mostly built out with the largest amounts of undeveloped land located in the southeastern portion of the County. The limited amount of undeveloped land leaves fewer opportunities for future large-scale development or conservation (**Figure 58**). The primary natural features found within DeKalb County include the South River, Peachtree Creek, Stone Mountain, Arabia Mountain, and Panola Mountain. (Note: “Undeveloped Land” is based on the Atlanta Regional Commission LandPro data.)



**Figure 58. Environmental Features**



## RETAIL MARKET CONDITIONS

Retail has been one of the most impacted industries during and following the COVID-19 pandemic. Not only were retail businesses and restaurants required to close across the country to support social distancing, but they also often had to reopen to capacities that are 50% or less than pre-pandemic levels. Local or independent retailers have been hit particularly hard, with many having to shutter their doors as consumer spending and store traffic dropped. The impact of the pandemic was not universally felt; some retailers, primarily grocery, pharmacy, and building supply stores that offer essential services, have fared well during this time.

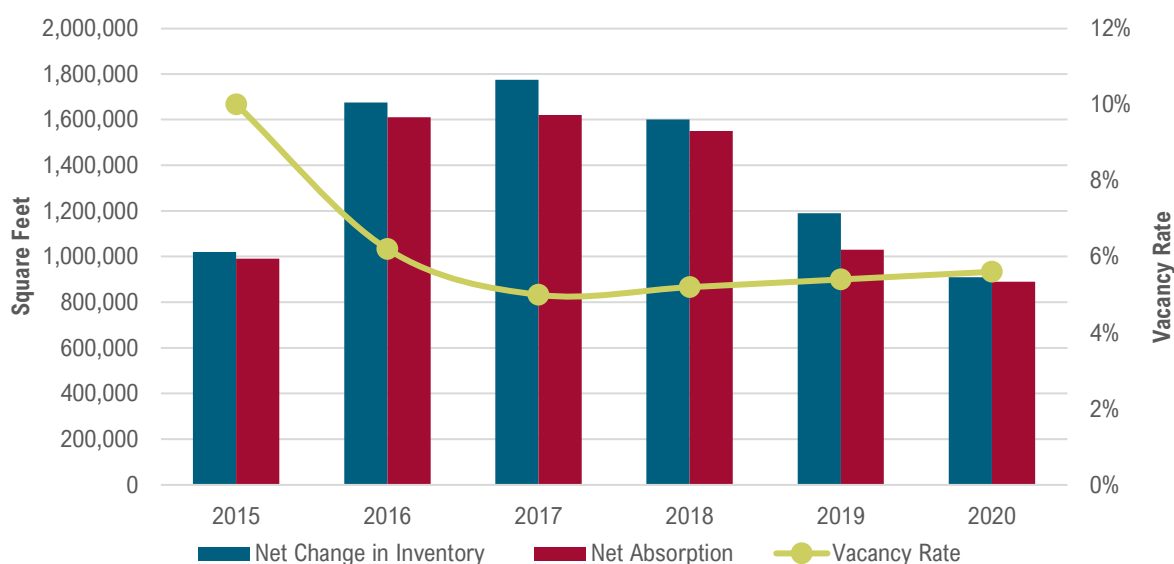
In addition to the direct closure impacts related to COVID-19, consumer preferences were already shifting. COVID-19 has amplified trends that were already impacting retail, particularly as it relates to the influence of online shopping. Online shopping has increased rapidly since March 2020. As local economies reopen, brick and mortar sales have rebounded. However, online retailers have been positioning to sustain their newfound capture of market share. Locations that offer experiential retail options will be well positioned to attract initial momentum during recovery from the COVID-19 pandemic. This section provides an overview of the retail real estate market in DeKalb County and the larger Atlanta region, focusing on the stability of existing inventory. A retail gap/leakage analysis is also presented.

## RETAIL PERFORMANCE

Retail performance in DeKalb County is measured through trends in completions, net absorption, vacancy, and average rent per square foot based on data provided by Costar, a third-party real estate data company. These measures are compared to the larger Atlanta retail market, which includes Gwinnett, DeKalb, Fulton, Cobb, and Clayton counties.

### Atlanta Market Retail Performance Trends

As shown in **Figure 60**, from 2015 to 2020, the vacancy rate in the Atlanta market decreased from 10.0% to 5.6%. More than 8.1 million square feet of new retail has been added during this timeframe and encompasses a wide variety of retail offerings. Net absorption totaled over 7.7 million square feet, resulting in an oversupply of approximately 480,000 square feet. Vacancy was highest in 2015 before declining and remaining stable over the last five years. It should be noted that the vacancy rates reflected below may not accurately reflect the current retail climate including tenants that still have leases on properties but are no longer in operation or those defaulting on their monthly payments.



**Figure 60. Retail Market Performance, Atlanta Market, 2015-2020**



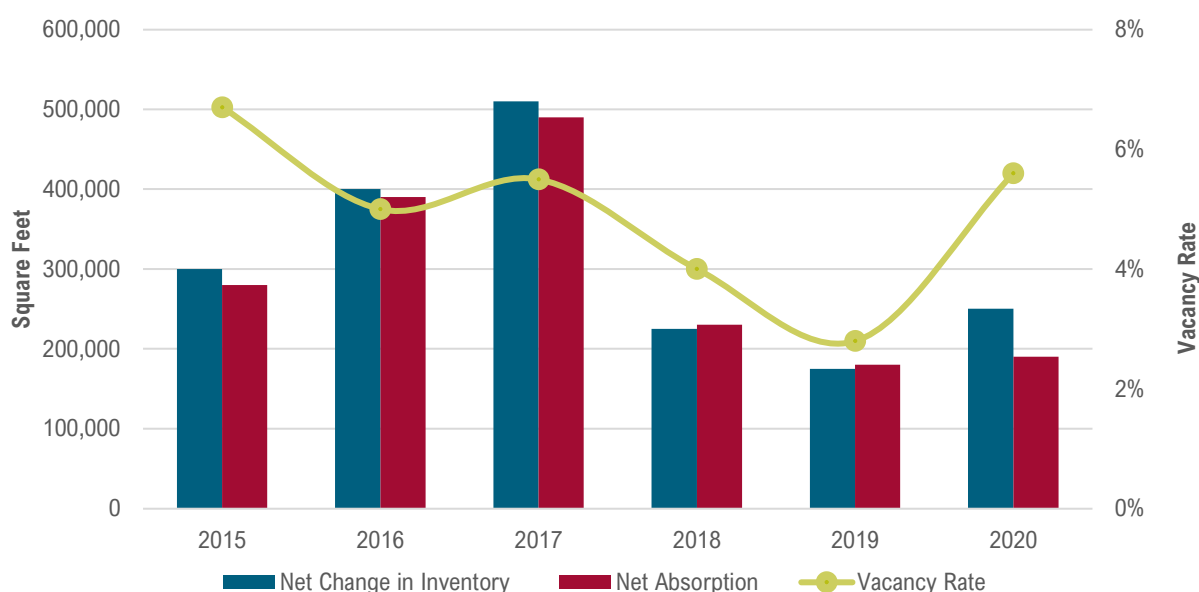
## DeKalb County Retail Performance Trends

DeKalb County had almost 14 million square feet of multi-tenant retail space as of August 2020. It should be noted that the inventory total below focuses exclusively on retail shopping centers or in-line retail suites, excluding free-standing, often owner-occupied, retail establishments. As shown in **Table 7**, more than 3.9 million square feet of space was completed before 1970, making it the most active decade for retail development. Approximately 1.3 million square feet of multi-tenant retail space was completed between 2010 and 2019, comprising only 9.2% of the total multi-tenant inventory. No new space was completed between 2020 and the second quarter of 2021.

**Table 7: Inventory by Decade Completed, DeKalb County, 2020**

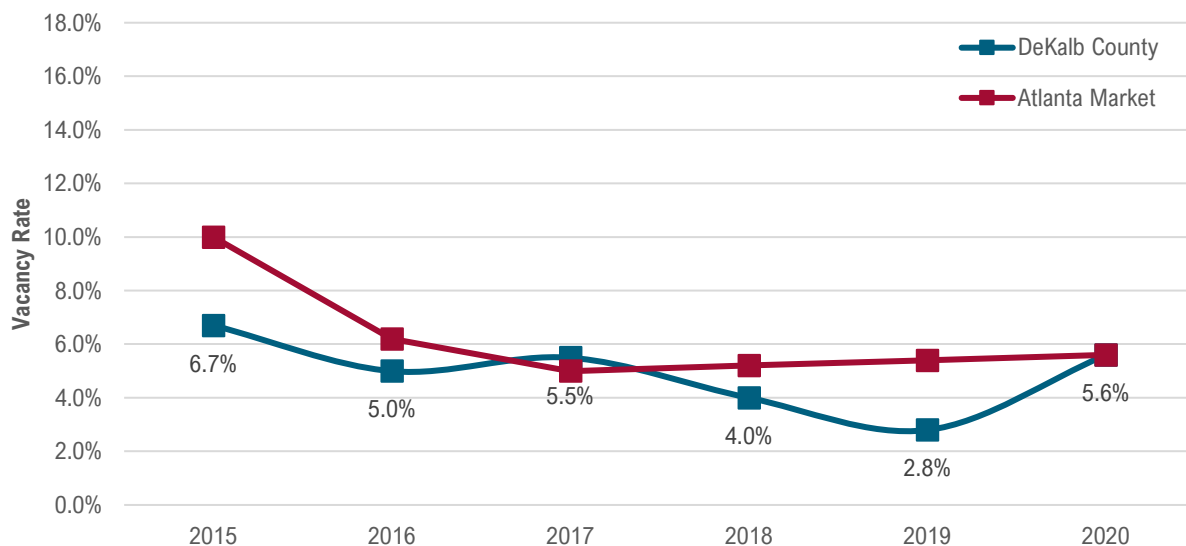
Decade Completed	Inventory (SF)	Percent of Total
Before 1970	3,926,010	28.3
1970s	3,601,690	26.0
1980s	2,629,910	19.0
1990s	1,086,800	7.8
2000s	1,345,360	9.7
2010's	1,269,230	9.2
After 2019	0	0.0
<b>Total</b>	<b>13,859,000</b>	<b>100.0%</b>

DeKalb County has added approximately 1.8 million square feet of net new retail space since 2015. New completions were more heavily concentrated between 2015 and 2017 and have tapered off in the last three years. The retail vacancy rate in the County was estimated at nearly 6.0% at year-end 2020 (**Figure 61**). This represents a 280-basis point increase in one year, largely driven by impacts from the COVID-19 pandemic.



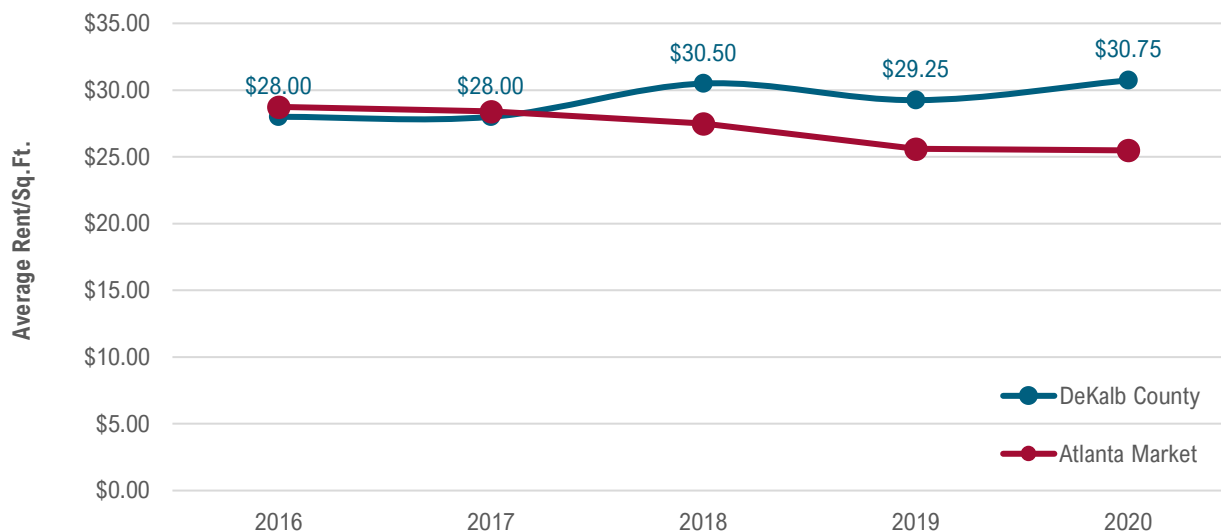
**Figure 61. Retail Market Performance, DeKalb County, 2015-2020**

As shown in **Figure 62**, DeKalb County has followed a similar retail vacancy pattern when compared to the larger Atlanta Market, with slightly greater fluctuation, likely due to the smaller base of retail space. Both geographies experienced overall declines between 2015 and 2020. DeKalb County and the larger Atlanta region had nearly identical vacancy rates at year-end 2020.



**Figure 62. Comparison of Retail Vacancy Rate Trends, 2015-2020**

Between 2016 and 2020, average lease rates for retail spaces in DeKalb County increased by 9.8%, from approximately \$28.00 to \$30.75 (**Figure 63**). The most recent average reported for the County was 3.5% higher than the measure for the larger Atlanta market. The average rents for the County were consistent with the market between 2016 and 2017 before establishing a clear premium in more recent years.



**Figure 63. Comparison of Retail Rent/Square Feet. Trends, 2016-2020**

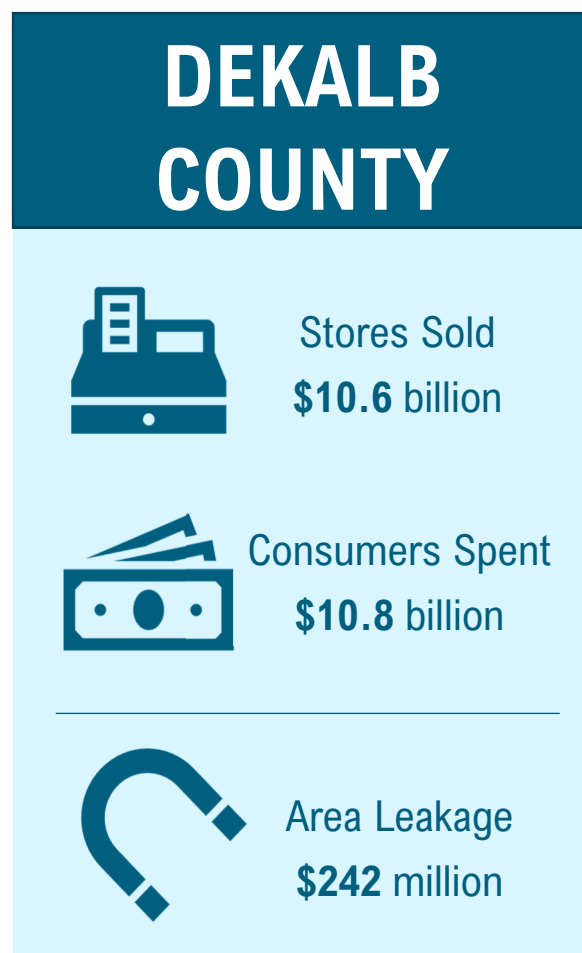
## RETAIL LEAKAGE ANALYSIS

Retail leakage refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be “leaking.” If a community is a major retail center with a variety of stores it will be “attracting” rather than “leaking” retail sales.

The graphic to the right shows the most recent data on retail sales and consumer expenditures in DeKalb County. The County had a leakage of \$242 million over the previous year, meaning that retailers in DeKalb County are selling less goods and services than residents are spending. In short, residents are looking outside of DeKalb County for a portion of their goods and services needs.

The numbers are not meant as accurate accounts of individual stores, but, taken as an aggregate, they provide reasonable estimates of expenditures and sales. Equally important, this type of data is reviewed by national chains when deciding whether to move into a new area.

As shown in **Table 8**, retail industries groups are balanced between those that are leaking sales outside of the county and those that are attracting a surplus (highlighted in the table). The industry group with the largest leakage of sales is Motor Vehicles & Parts Dealers. For the industry groups where demand is outpacing supply, such as Motor Vehicles & Parts Dealers, spending by County residents is most likely occurring in other areas of the Atlanta region. Electronics and Health & Personal Care Stores have the largest retail surplus in assessed dollar amount, followed by Health & Personal Care Stores, Food and Beverage, and General Merchandise.



**Table 8: Retail Leakage/Surplus, DeKalb County, 2020**

**Retail Industries Leaking Sales**

Industry Group	Demand	Supply	Leakage Outside DeKalb County
Motor Vehicles & Parts Dealers	2,041,291,496	1,527,635,362	\$ 513,656,134
Building Materials & Supply Stores	576,752,857	440,326,617	\$ 136,426,240
Miscellaneous Store Retailers	339,141,809	234,749,941	\$ 104,391,868
Furniture & Home Furnishings	387,749,471	316,937,963	\$ 70,811,508
Non-store Retailers	129,407,326	69,693,703	\$ 59,713,623
Sporting Goods, Hobby, Books & Music Stores	271,389,179	226,700,173	\$ 44,689,006
Gasoline Stations	1,134,996,219	1,100,181,234	\$ 34,814,985
Food Services & Drinking Places	1,088,658,249	1,072,604,364	\$ 16,053,885
Clothing & Clothing Accessory Stores	505,881,573	490,437,605	\$ 15,443,968

**Retail Industries Attracting Sales**

Industry Group	Demand	Supply	Attraction Into DeKalb County
Electronics & Appliance Stores	347,888,522	606,069,464	\$ 258,180,942
Health & Personal Care Stores	590,768,778	839,184,679	\$ 248,415,901
Food and Beverage Stores	1,721,959,657	1,919,369,710	\$ 197,410,053
General Merchandise Stores	1,737,031,970	1,786,050,338	\$ 49,018,368



## KEY TAKEAWAYS

DeKalb County is a large complex county, with highly developed infrastructure and public services.

- Residential uses, particularly single-family residential, are the predominant land use within DeKalb County.
- A sizeable portion of the County is designated as single use “Suburban” on the Future Land Use Map. However, there are a wide variety of development and housing types in these areas.
- Housing development has slowed, and prices have begun rising in both Metro Atlanta and DeKalb County, largely due to a housing shortage in the region.
- There are numerous CIDs, LCIs, and SAPs in DeKalb, and these organizations and planning efforts inform and, in many instances, have catalyzed investments within their boundaries.
- Economic development and job growth have historically been concentrated inside I-285 and in northern sections of the county.
- DeKalb has a higher worker participation rate than the regional average with many jobs concentrated in healthcare and education.
- DeKalb County’s largest industries are those that have been slower to recover from the economic shocks created by the pandemic.
- The County has a higher unemployment rate than the overall region.
- County services and facilities, particularly park and recreational infrastructure, are more heavily concentrated in northern and western sections of the county where population densities are greater. Parks are most prevalent in incorporated areas, particularly in Decatur, Avondale, and Atlanta, while large open space preserves are present in the eastern portions of the county. Large pockets in the central portion of the county and the far southwestern county are underserved.
- Because the county is highly developed, there are fewer parcels remaining for large-scale development or conservation, increasing the urgency of land acquisition for future parks and trails.
- The county’s arts and cultural resources are concentrated in the central west portion of the County, particularly in the City of Decatur and around Emory University.
- Health and wellness vary across the County. Many southern and eastern sections of the County meet the FDA’s definition of a food desert, indicating low access to healthy foods.