

DEFINE OUR AUBURN

A LIVABLE CENTERS INITIATIVE STUDY

Prepared by: TSW



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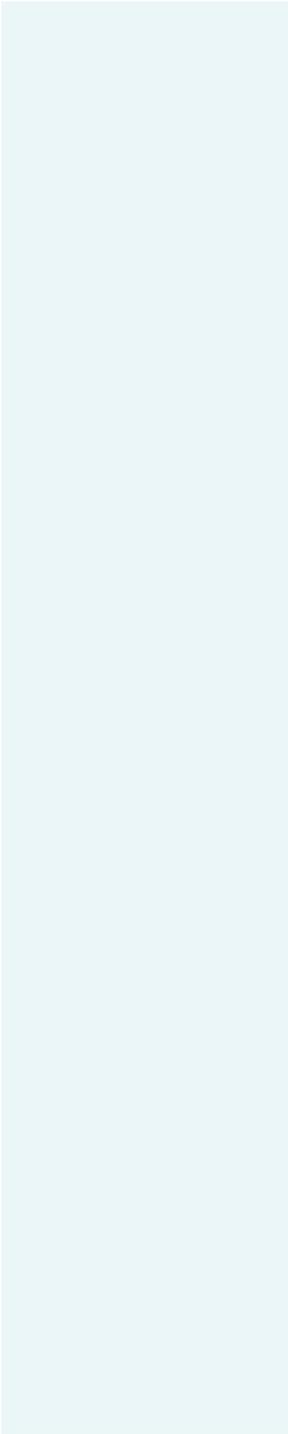
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The opinions, findings, and conclusions in this publication are those of the author(s) and not necessarily of the Department of Transportation, State of Georgia or the Federal Highway Administration.

Prepared in cooperation with the Department of Transportation, Federal Highway Administration and the Atlanta Regional Commission



**“THIS LCI STUDY GIVES US A CHANCE TO
LINE UP FOR FUNDING, BUT WE ALSO
WANT TO USE THIS OPPORTUNITY TO
GAIN FURTHER, MORE SPECIFIC INPUT
FROM THE PUBLIC”**

-Mayor Linda Blechinger, AJC News Article

01

PLANNING CONTEXT

IN THIS CHAPTER

- Project Overview
- Planning Process
- Previous Plans

WHAT IS AN LCI?

The Atlanta Regional Commission's Livable Centers Initiative (LCI) is a grant program that incentivizes local jurisdictions, like the City of Auburn, to re-envision their communities as vibrant, walkable places that offer increased mobility options, encourage healthy lifestyles and provide improved access to jobs and services.

Since 2000, the LCI program has invested \$254 million in over 120 communities throughout the Atlanta region, helping pay for planning studies and the construction of transportation projects, such as sidewalks and intersection improvements, to bring those visions to life.

The LCI program is funded with federal transportation dollars. The grants cover 80 percent of the cost of each study or transportation project, with the recipient making a 20 percent match.



Goal 1: Balance transportation and land use



Goal 2: Promote a mix of land uses



Goal 3: Encourage sustainable growth

PROJECT OVERVIEW //

The City of Auburn was awarded a \$96,000 LCI Grant by the Atlanta Regional Commission. This grant was used to create **Define Our Auburn**; a road map to guide development within Downtown Auburn and to be a resource on how to successfully implement the ideas generated through the public process.

The overarching goal of this study is to work with the public to create a vision for the future of Downtown Auburn — a vision that will encourage appropriate development, make walking and biking easier, and revitalize historic downtown.

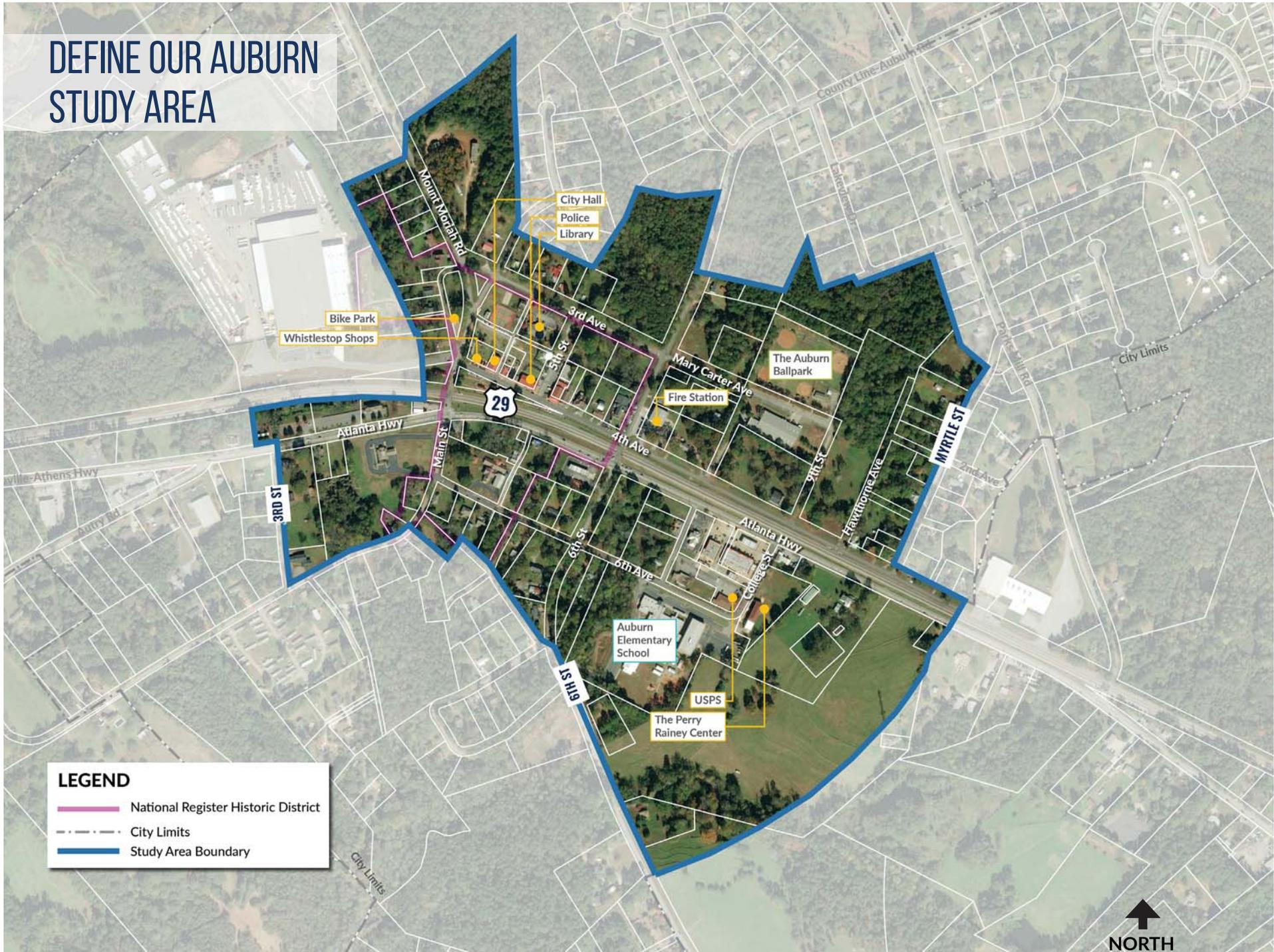
AREA OF FOCUS

The Define Our Auburn study looks at the area identified as Downtown Auburn (per the existing downtown overlay zoning district). In addition to this, the study area includes parcels recently acquired by the City in 2018 for a new City Hall (southeastern section of the study area). The extent of the Study Area, including landmarks, are illustrated on the adjacent map.

IMPACTS OF COVID-19

The COVID-19 pandemic, which occurred during the preparation of this LCI study, has impacted our thinking about plan recommendations, and is expected to have long-lasting impacts on how the plan is likely to be implemented. Although these impacts are uncertain at this time, certain changes are likely to emerge which will affect funding priorities and development patterns. One anticipated change, which could have a significant impact on small town growth patterns, is a renewed desire to live in less urban, congested places offering live, work, and play opportunities based on “social distancing” expectations. The following plan was developed with this in mind.

DEFINE OUR AUBURN STUDY AREA



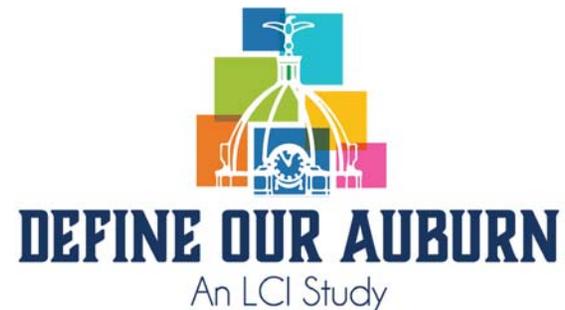
LEGEND

- National Register Historic District
- City Limits
- Study Area Boundary



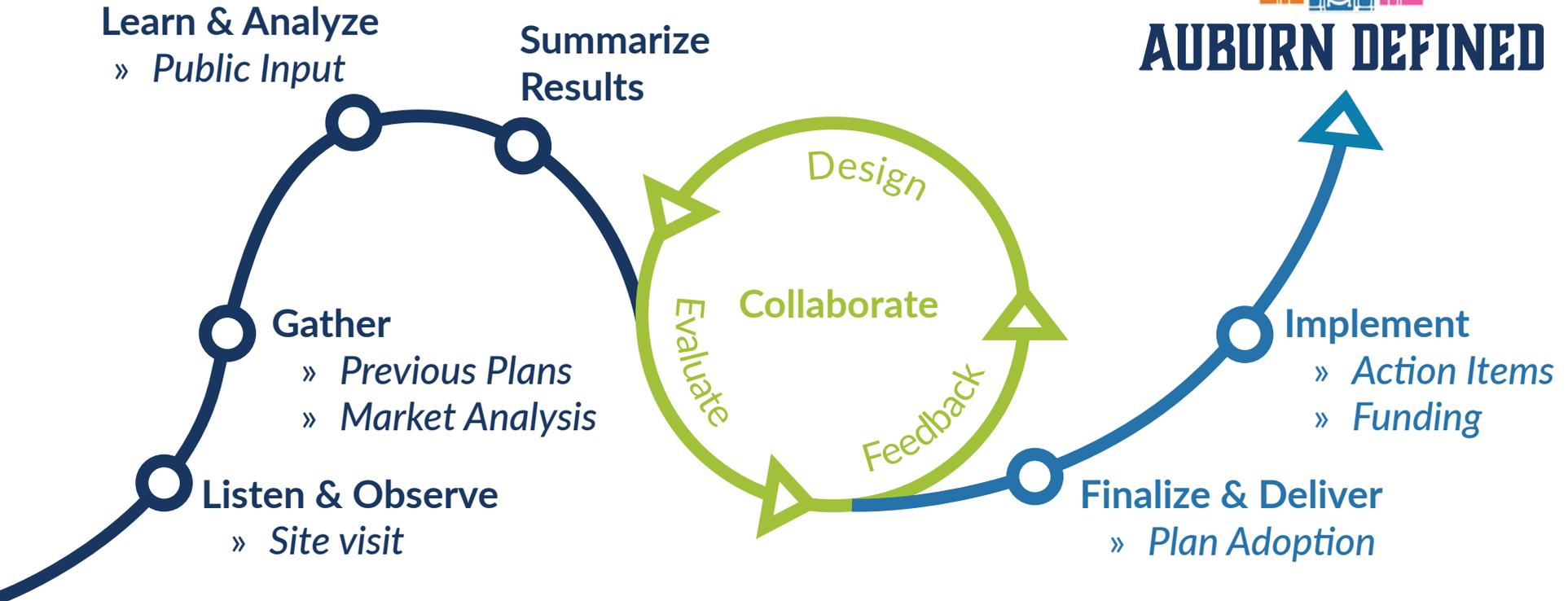
PLANNING PROCESS //

An overview of the planning process for this study is seen on the adjacent page. This diagram illustrates the planning process from start to completion, identifying major steps along the way. The process is broken down into three sections, Discovery, Design Iteration, and Build; with the corresponding chapters of the document identified below each heading. Each step has its own process that should be followed to provide a conclusive result to be used as a foundation for the next, with the end result being a document to promote appropriate development and economic growth of Downtown Auburn.





AUBURN DEFINED



DISCOVERY

Research & Analysis
(Chapters 1 & 2)

DESIGN / ITERATION

Visioning & Plan
Recommendations
(Chapters 3 & 4)

BUILD

Implementation
(Chapter 5)

PREVIOUS PLANS //

There are several recent planning efforts that impact the LCI Study Area and were carefully reviewed as part of preparing this LCI plan. The Strategic Implementation Plan is the oldest of these plans, as such, some of the it's recommendations may be superseded by more recent studies. The following is a brief overview of these plans and any specific recommendations affecting the LCI study.

STRATEGIC IMPLEMENTATION PLAN - AUBURN DOWNTOWN DISTRICT (2010)

The Strategic Implementation Plan provides an action-oriented strategy for implementing ongoing master plans for Downtown Auburn. It examines existing conditions and plans

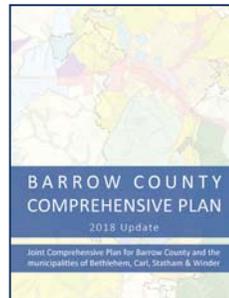
and uses them to establish a timetable for new developments/ improvements, formulate potential funding strategies, and provide illustrative concepts for future development sites.

The Strategic Implementation Plan also includes many detailed recommendations typically suitable for an LCI study. These include:

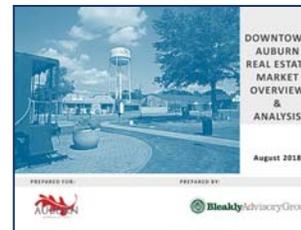
- A detailed illustrative concept plan for the core of Downtown Auburn that includes establishing a walkable, mixed-use center featuring:
 - » Infill development that preserves the historic core of buildings and takes advantage of the existing grid pattern.



Strategic Implementation Plan Auburn Downtown District



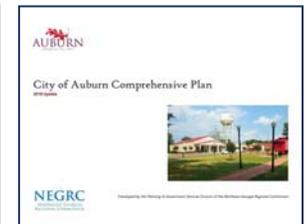
Barrow County Comprehensive Plan



Downtown Auburn Real Estate Market Overview & Analysis



Auburn Downtown Redevelopment Strategy and Master Plan



City of Auburn Comprehensive Plan



- » A fine-grained mix of buildings and uses including retail commercial, residential, live/work, townhomes.
- » Two- and three-story mixed-use buildings throughout most of downtown.
- » The most intense development along 4th Avenue and 3rd Avenue, and the least intense adjacent to existing single-family houses.
- » Retail growth along 4th Avenue that reinforces retail patterns and expands along 3rd Avenue with storefronts close to the street, wide sidewalks.
- » Additional surface parking lots (rear and sides of buildings) and on-street parallel parking.
- » Pocket parks, plazas, community gathering spaces and a premier downtown park defined by public and private buildings.
- » Streetscape improvements on 3rd Avenue (sidewalks, crosswalks, on-street parking).
- » Streetscape improvements on 9th Street (sidewalks, crosswalks, on-street parking).
- Improve sidewalks and trails throughout the study area.
- Encourage infill development and allow a variety of housing types
- Encourage more intensive residential uses especially in the outer edges as cluster development.
- Redevelop existing mobile home park into quality multi-family housing
- Preserve historic resources and use them to leverage state and federal financial incentives for preservation.
- Use historic styles as the basis for future development and quality over quantity

- Create design guidelines for downtown.
- Install historic markers.
- Explore expanding the National Register Historic District.
- Create a local Historic District.
 - » Serve multiple modes of transportation, complete streets, intuitive network.
 - » Improve road and pedestrian railroad crossings, especially at County Line Road.
 - » Widen Mount Moriah Road to four lanes.
 - » Widen Etheridge Road to serve as a collector between Atlanta Highway and Mount Moriah Road.
 - » Create a grade-separated railroad crossing at Etheridge Road and Atlanta Highway.
 - » Build new roads to re-establish the grid with small



block lengths and add sidewalks.

- » Upgrade streetscapes.
- » Support the Great Rail Trail proposal along Atlanta Highway (multi-use path).
- » Install bike racks and bike routes between community facilities.
- » Install bike lanes on almost all streets.
- Use pervious materials in parking lots.
- Encourage local food production with community gardens.
- Plant native species.
- Create usable green space requirements as part of larger developments.
- Build a community gathering space in front of the library.
- Create a green street on 5th Street.
- Downtown premier park with amphitheater (7-acre park).
- Relocate Auburn Sports Complex to a larger location to accommodate larger fields and rec facilities.
- Enhance the appearance of Auburn Cemetery.
- Relocate community gardens to 6th street.
- Support conversion and renovation of community buildings.
- Create a welcome center.
- Turn the Parks-Hawthorne House into a local history museum and events center
- Bury utilities or relocate behind buildings.
- Relocate City Hall, Public Works, and Police Station

near each other.

- Add lighting in parks and on downtown streets.
- Upgrade sewer, gas, water lines

BARROW COUNTY COMPREHENSIVE PLAN (2018 UPDATE)

The comprehensive plan is the official policy guide for growth and development in much of Barrow County. Although the plan excludes specific recommendations for incorporated areas in Auburn and Braselton, it does contain several items indirectly affecting the LCI study area:

- By 2040, the unincorporated area of the county is projected to attract over 75% of all growth in the county - almost 31,000 more people for a 38% increase over 2018. Much of this growth is focused in the southwestern part of the County, near Auburn, and could provide a market for downtown businesses.
- By 2040, only 600 new residents are expected in Auburn. However, this projection appears to be based on a continuation of historic growth trends and does not consider the potential population growth impacts of creating a vibrant downtown area. See the 2019 market overview below.
- Future private-sector job growth is expected to be focused in the Retail Trade and the Services sectors under normal future conditions. These sectors are generally well suited for LCI communities.

Additionally, the comprehensive plan includes several policies aimed at promoting local character and quality growth in the county. Such policies directly support the intent of the LCI program.

CITY OF AUBURN COMPREHENSIVE PLAN (2018)

Auburn adopted its latest comprehensive plan in 2018. The plan identified new future land use categories within the LCI study area; specifically, this included a Mixed-Use designation intended to align with the Auburn Town Center Redevelopment Strategy and Master Plan for implementation of neighborhood commercial, civic, and residential. Below are the goals of the 2018 Comprehensive Plan:

- Continue to develop community engagement
- Incentivize small-business and industrial development
- Invest in infrastructure improvements and other public projects to spur private development
- Improve public facilities and programming opportunities
- Develop a comprehensive system of paths, trails, and complete streets
- Increase diversity and civic pride
- Provide a variety of housing options

The vision statement noted Auburn as having a quaint hometown feel. The goals for the future of Auburn are based on this view, and it should also be the intent of this LCI study to continue to promote this vision through appropriate concept planning. Additional information on the Comprehensive Plan, specifically the two future land use designations found within the LCI study area, are reviewed further on page 32.

DOWNTOWN AUBURN REAL ESTATE MARKET OVERVIEW & ANALYSIS (2018)

The market overview provides a detailed inventory and assessment of demographic, economic, and market trends in Downtown Auburn. It identifies market opportunities for potential residential and retail development opportunities in downtown that can be used to plan for the area's future.

Key findings affecting the LCI study area include:

- Future growth in Downtown Auburn should build upon the existing strengths that set downtown apart from newer areas. These include downtown's small-town feel, historic character, walkability, and sense of community.
- The greater Atlanta real estate market puts a 15% to 30% premium on housing and commercial uses located in a unique, walkable setting, as compared to traditional suburban centers. As noted above, Downtown Auburn is well-positioned to tap into this trend.
- Downtown Auburn should seek to provide:
 - » New for-sale housing immediately and rental housing in later phases;
 - » Varied and unique residential housing types including small-lot homes with front porches that face an open space at multiple price points;
 - » A central gathering space for concerts, farmers markets, festivals, etc. that is constantly programmed with activities; and
 - » A trail system that connects the central gathering space to neighborhoods and new pocket parks.

AUBURN DOWNTOWN REDEVELOPMENT STRATEGY AND MASTER PLAN (2018)

The Auburn Downtown Redevelopment Strategy and Master Plan began in 2018, is an ongoing project that continues to be updated and refined. The 2018 work laid the foundation for the City's application for LCI study funding. The project seeks to inspire new development in Downtown Auburn that will serve as a catalyst for commerce and enhanced civic life while respecting the history of Auburn. This effort is spearheaded by the Downtown Development Authority (DDA) and Schmit+Associates (Auburn's downtown development partner). This LCI study should collaborate with the DDA and Schmit+Associates to provide a seamless vision for Downtown Auburn. Findings affecting the LCI study area include:

- Invest in public infrastructure
 - » New City Hall
 - » Zoning and architectural standards (form-based)
 - » Streetscape standards
 - » Redevelop vacant structures
 - » Gateways, signage, beautification
 - » Pedestrian crossing on RR
- Sustainable economic model to leverage public investment to support growth
 - » Market study to determine demand and mix of uses
 - » Determine the sources of funds for public investments / prioritize
 - » Define where to expand retail
 - » Residential that serves broad demographics
 - » Façade grants
 - » Traffic and transportation plan to address growth
 - » P3 developments

- Improved experience for residents, business owners, visitors
 - » Program activities
 - » Market cultural identity
 - » Themes to drive downtown activity
 - » 18-hour public life, uses that increase pedestrian traffic
 - » Entertainment venue?
- Integrate natural features – connections, healthy community, environmental considerations
 - » Underutilized parcels for parks and green space
 - » Central civic space
 - » Historic resources to establish character
 - » Green infrastructure, arts



Proposed City Hall and Residential - 2018 Master Plan



Proposed Downtown Residential and Commercial Infill - 2018 Master Plan



DEFINE OUR AUBURN

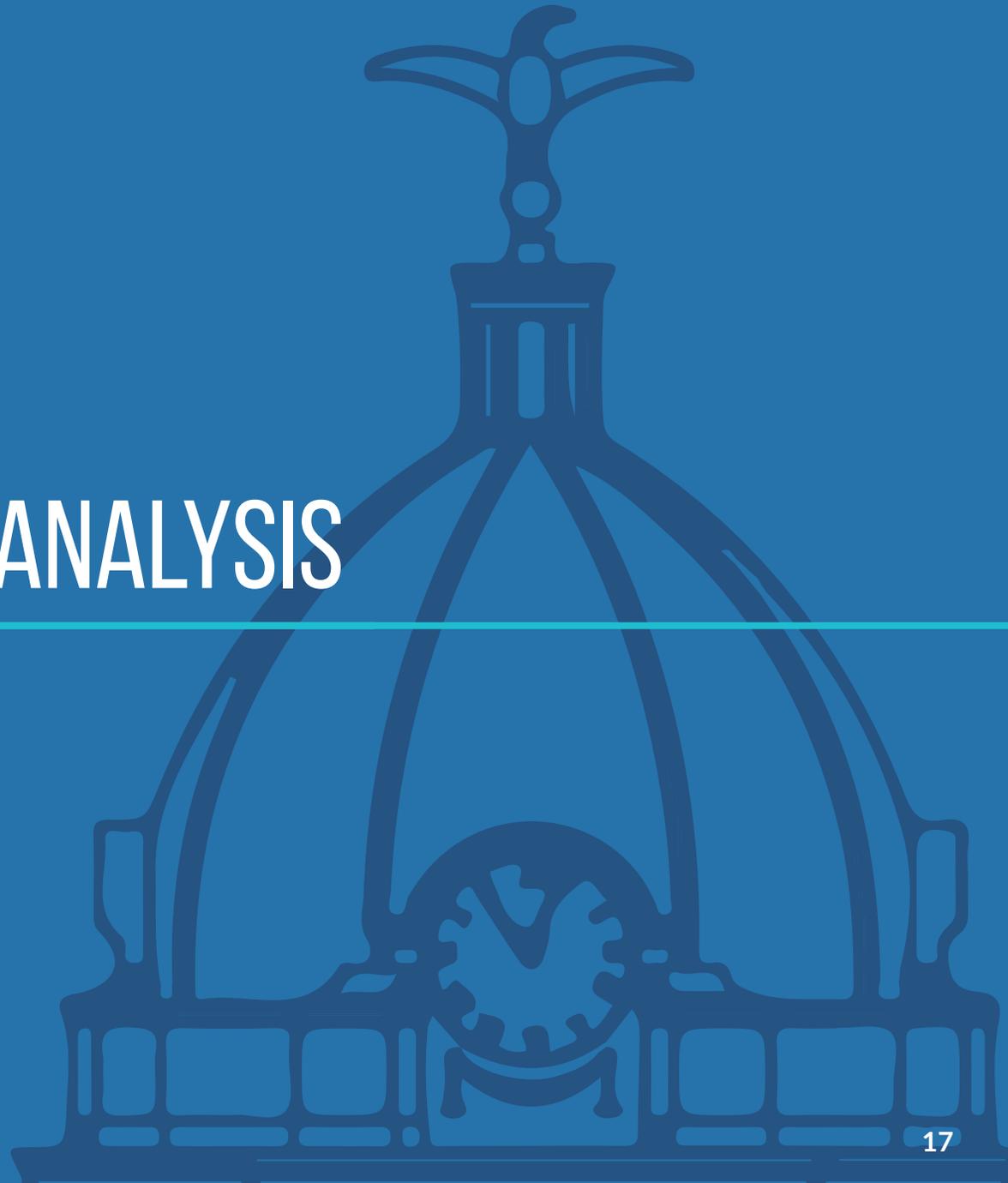
An LCI Study

02

DISCOVERY & ANALYSIS

IN THIS CHAPTER

- Context
- Demographics
- Existing Conditions
- Zoning & Development Regulations // Existing
- Market Conditions



CONTEXT //

The City of Auburn was established in 1892 and got its name from the red clay used to dye cloth auburn-red. Its city limits extend in both Barrow and Gwinnett Counties, and is located between Atlanta and Athens, allowing for unique economic opportunities. It shares a border with the Gwinnett County to the west and the Town of Carl to the east. The City of Winder and Town of Braselton are no more than a 15-minute car ride away.

The City of Auburn is the second largest in Barrow County, located approximately 33 miles west of Athens, approximately 10 miles northeast of Lawrenceville, and about 40 miles east of Atlanta.

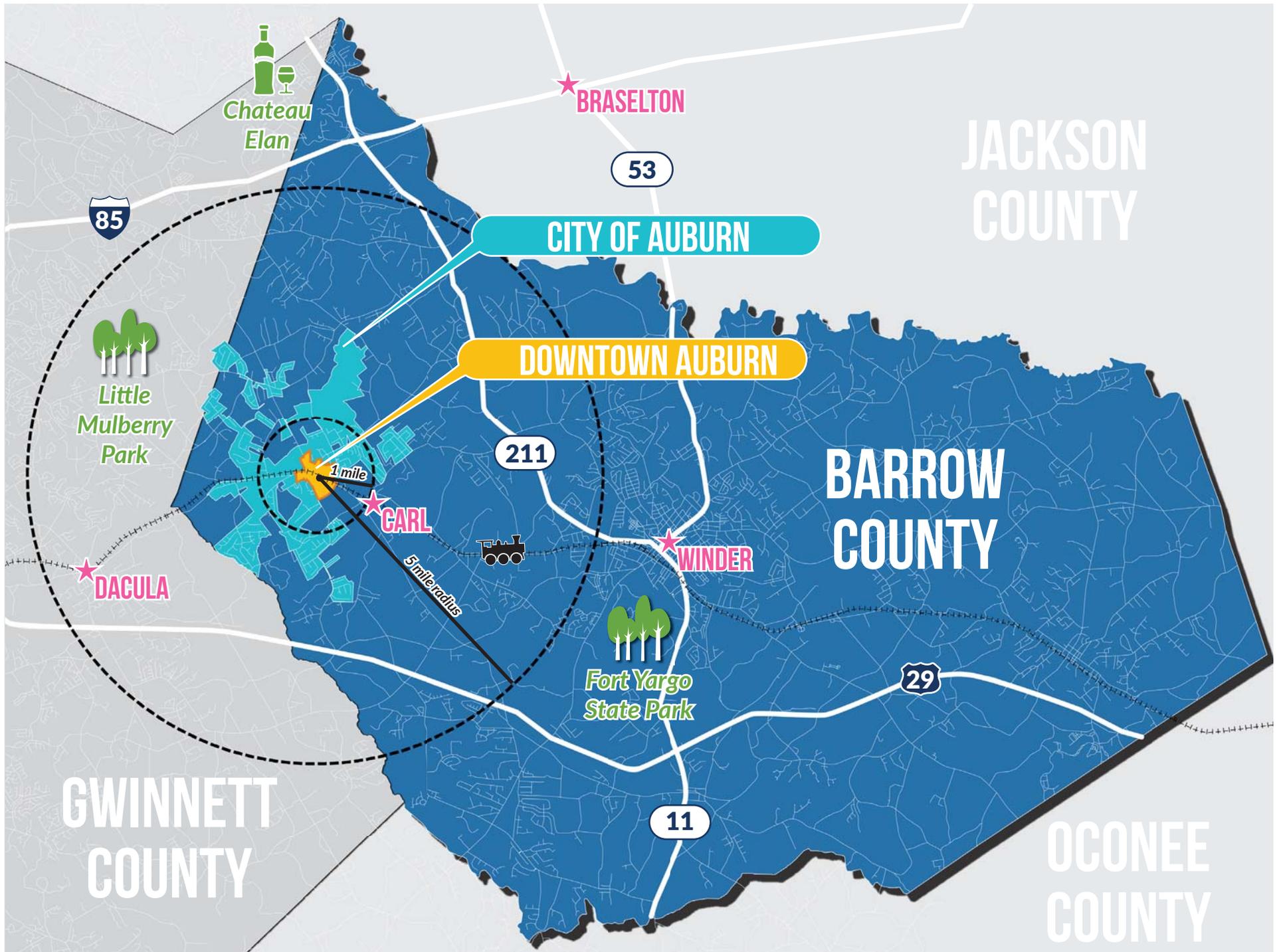
Covering about 6.5 square miles, Auburn is a small municipality with a quaint hometown feel. The downtown is bisected by Atlanta Highway and the CSX railroad. An interstate does not directly run through the city limits but Auburn residents are served by Interstate 85 to the north and Highway 316 to the south. Other major highways nearby including Highway 211 and 324.

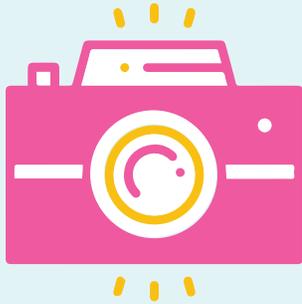
As illustrated on the adjacent diagram, both the market analysis and existing conditions analysis completed for this study and summarized in the following chapter, reference five main areas:

- One-mile radius around intersection of Atlanta Highway and 6th Street, represented by the smaller circle, shown as a black, dashed line (referred to as the **Local Market Area** in the LCI Market Study);
- The Auburn city limits, highlighted in light blue;
- Five-mile radius around the intersection of Atlanta Highway and 6th Street, represented by the larger circle, shown as a black, dashed line (referred to as the **Primary Market Area** in the LCI Market Study);
- Barrow County, highlighted in dark blue; and
- The LCI Study area boundary, highlighted in bright yellow.



Historic mercantile building - northeast corner of 4th Avenue and 5th Street.



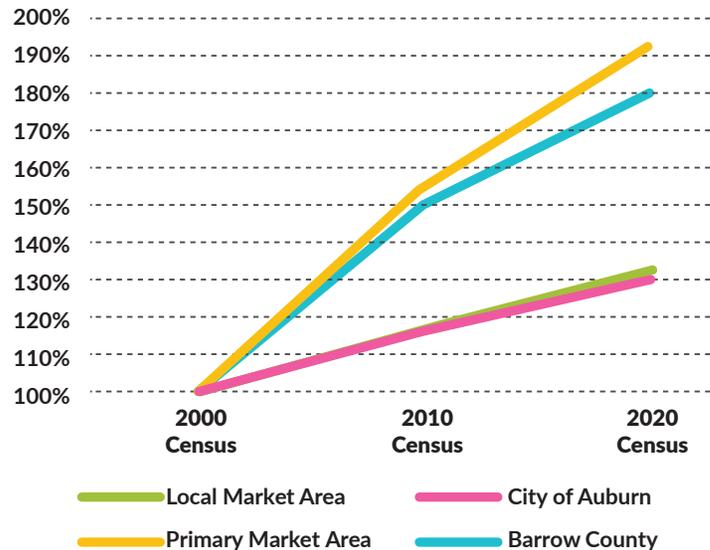


SNAPSHOT OF DEMOGRAPHICS

- The population of the Primary Market Area (five-mile radius) has historically grown at a faster rate than Barrow County (over 5% annually from 2000 to 2010), and at a considerably faster rate than the City of Auburn, though that rate of growth in the PMA was slower between 2010 and 2020 than in the previous decade.
- Generation X makes up the largest age cohort in all of the areas studied.
- The Primary Market Area has a household median income of \$80,105, well above Barrow County's median of \$63,396.
- Households in the PMA especially tend to occupy single-family homes, with the average number of persons per household averaging at 3.1, slightly higher than the Barrow County's figure of 2.9.
- 98.1% of working Auburn residents work outside of the city limits
- While employer density has increased around Barrow County, it has remained relatively flat in Auburn.

DEMOGRAPHICS //

Relative Population Growth (2000 to 2020)



POPULATION

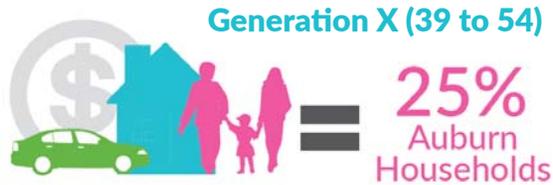
The Primary Market Area (five-mile radius around Downtown Auburn) has 51,653 *residents*, and grew by 5.5% per year on average between 2000 and 2010, slowing to 2.4% per year between 2010 and 2020.

The Primary Market Area (PMA) comprises 16,718 *households*. Between 2000 and 2010 the average annual *household* increase was 5%; 2.2% between 2010 and 2020.

The population in the PMA has grown at a faster rate than Barrow County overall, while the City of Auburn and the Local Market Area (one-mile radius around Downtown Auburn) have grown at slower rates than Barrow County and the PMA.

AGE DISTRIBUTION

Residents in the Primary Market Area have a median age of 36 years, on par with Barrow County. This median age is only slightly above that of urban centers such as Augusta (34), Atlanta (35), and Charlotte (35). Generation X represents the Primary Market Area's largest generational cohort, with a 26% share of Primary Market Area residents, generally consistent with the county and city.

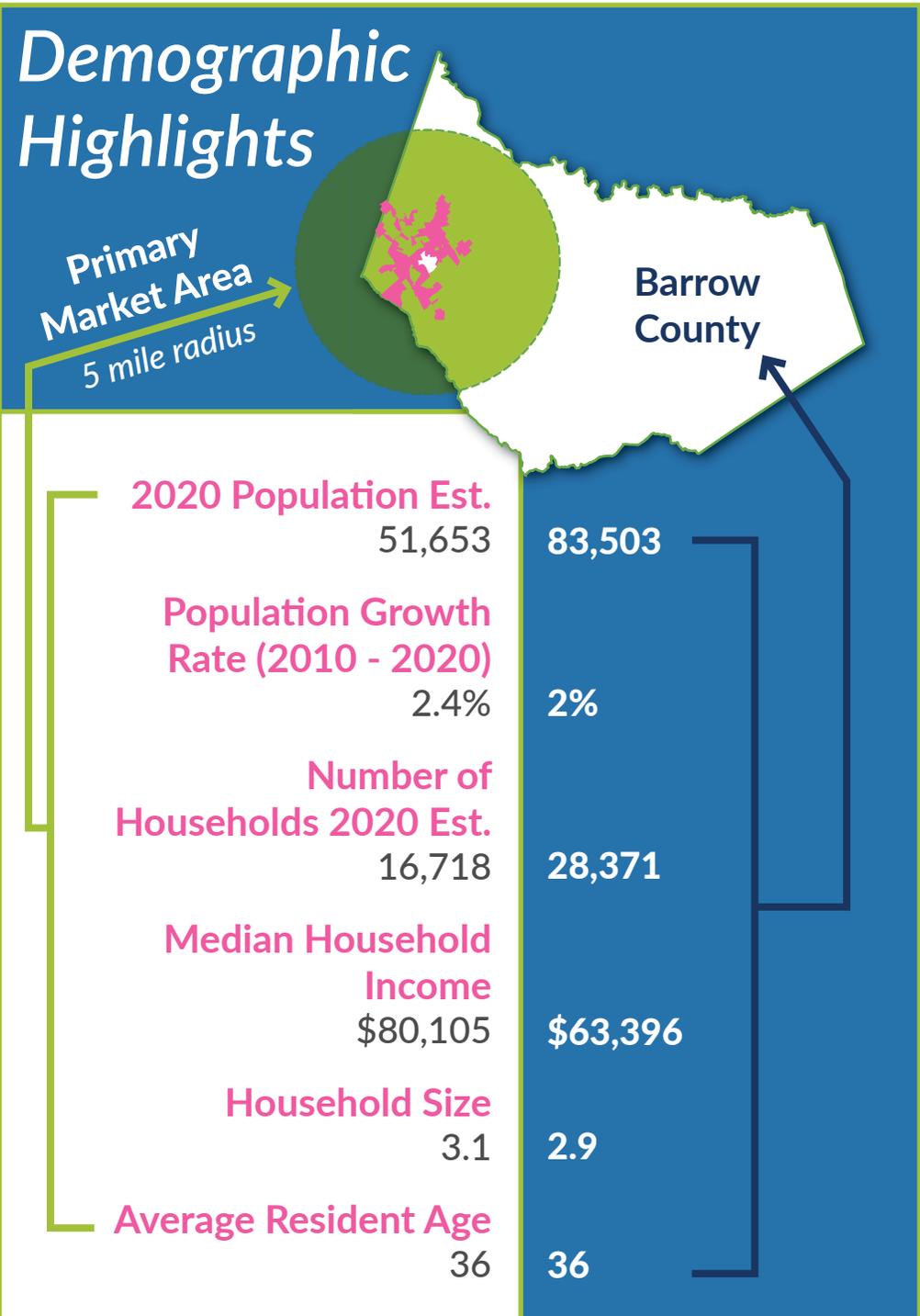


HOUSEHOLD INCOME

The Primary Market Area has a household median income of \$80,105, well above Barrow County's median of \$63,396. The City of Auburn (\$57,911) and the Local Market Area's (\$55,497) median income is slightly less than that of Barrow County. Over 12,000 households, or almost three quarters of the Primary Market Area's households, earn \$50,000 or more and about 6,165 households, or 37% of market area households earn more than \$100,000.

HOUSEHOLD CHARACTERISTICS

The Primary Market Area's household characteristics are broadly similar to those of Barrow County. There is an average of 3.1 person households in the PMA compared to 2.9 persons in Barrow County. Small households (1 or 2 residents) make up 43% of all households in the PMA versus 49% in Barrow County. Single-detached housing makes up 90% of the homes in the Primary Market Area compared to 80 in the City of Auburn and 83% in Barrow County, however, multi-family housing is very rare in the Primary Market Area.



EXISTING CONDITIONS //

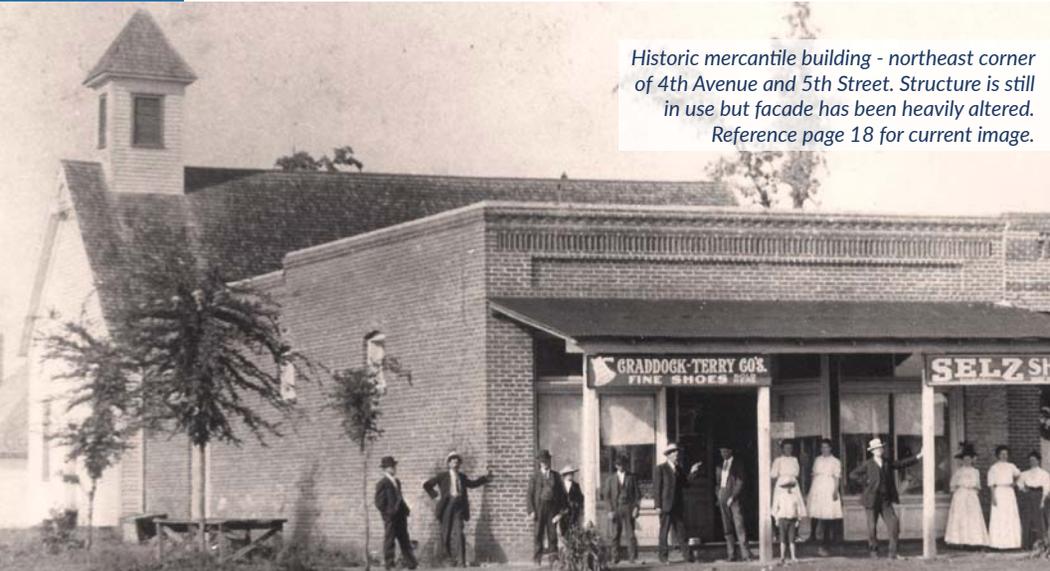
CULTURAL RESOURCES

The historic building inventory of Auburn represents many different periods, most notably late Victorian cottages in the Queen Anne style in addition to late 19th and early 20th century American Movements Bungalow/Craftsman. In June of 1997, in order to protect the architectural history of Auburn, the City established a National Register Historic District, as shown on the adjacent map. This district includes the commercial area along the north side of 4th Avenue. Behind the commercial block are some historic houses, Auburn Public Library (non-historic), and vacant lots. On the south side of the train tracks is a 1910-1930 residential area that occupies

a two block area and extends along 6th Avenue. The Auburn Cemetery is located at the districts northwestern boundary.

The National Register District represents a period of significance from 1891-1947 and is comprised of buildings located on a loose grid structure, typical of a late-nineteenth century Georgia railroad town. A plan for Auburn was developed in 1890 but was never fully realized. The 1890's plan called for a rigid grid structure of small blocks divided into four quadrants by alleys. The block bounded by Mount Moriah Road, 4th Avenue, 3rd Avenue, and 5th Street is the only remaining block, with active street uses, as shown on the original plan.

Currently the City of Auburn does not have a historic district or strong design guidelines in place to regulate appropriate development within the National Register District or the downtown. The Downtown Overlay District zoning designation states a consistent vision of strengthening Downtown Auburn as a mixed-use core featuring housing, commercial, and public uses but does not provide strong guidelines on how to preserve structures and landscapes of historic and cultural value. Many historically significant buildings lay outside of the National Register District. For this reason, this study should explore developing a local historic district zoning overlay that includes strong historic preservation standards relating to redevelopment of historic properties and structures.



Historic mercantile building - northeast corner of 4th Avenue and 5th Street. Structure is still in use but facade has been heavily altered. Reference page 18 for current image.

AUBURN NATIONAL REGISTER HISTORIC DISTRICT

National Register Historic District Boundary (Pink Line)

Bike Park
Whistlestop Shops

City Hall
Police Department

The Auburn Ballpark

Auburn Elementary School

LEGEND

- Building Footprints
- Contributing Structures
- City Parks & Open Space
- City Limits
- Study Area Boundary





Whistlestop Shops

COMMUNITY RESOURCES

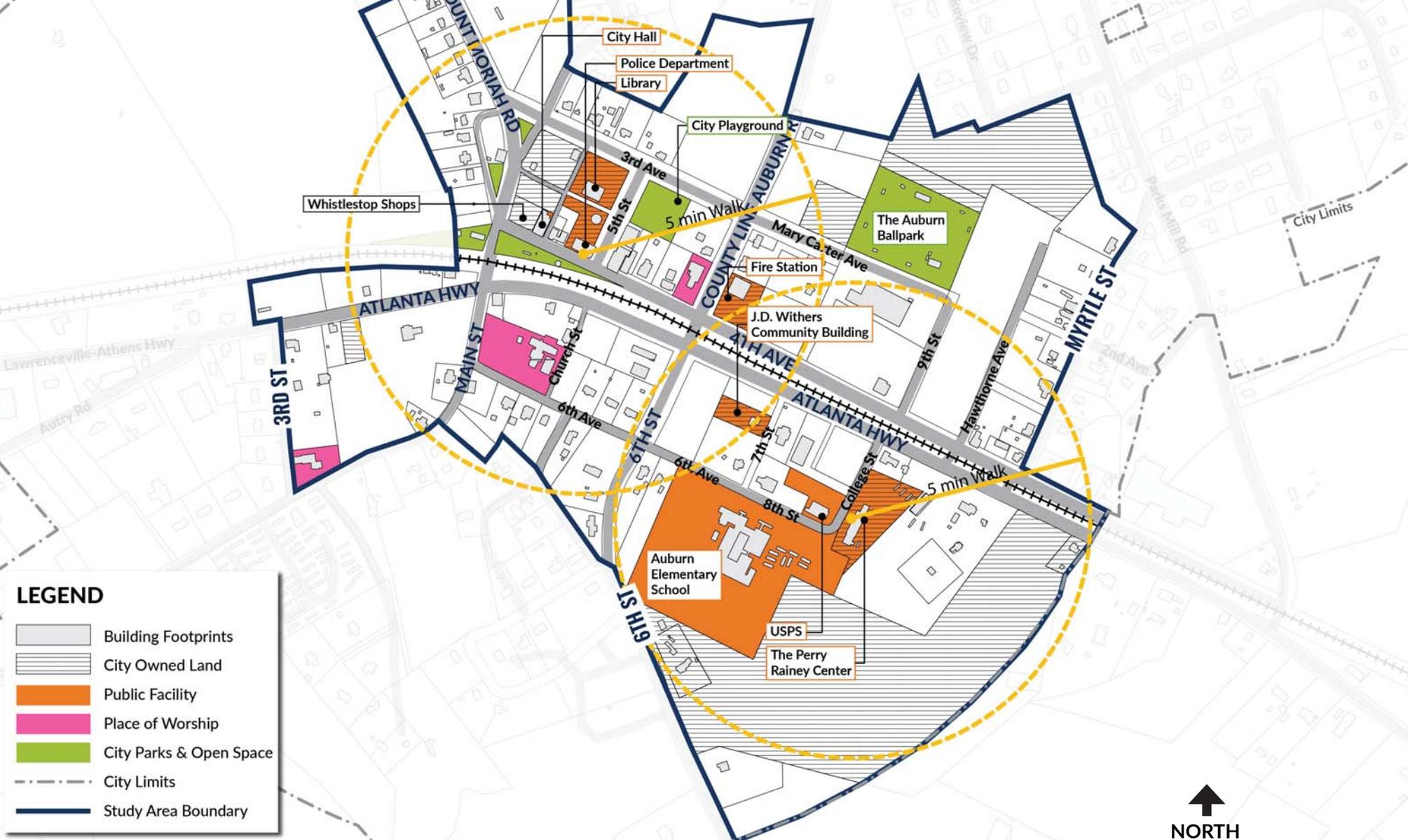
Community resources includes places where people gather, such as schools and parks, or public facilities that provide important and necessary services for everyday life. Downtown Auburn has a diverse collection of community resources, and unlike most cities in the Atlanta metropolitan area, has maintained these civic functions within the downtown area including its city hall, police station, library, post office, elementary school, and multiple park spaces.

Additionally, Auburn has provided a unique opportunity for small businesses in downtown through the implementation of the Whistlestop Shops located at the corner of 4th Avenue and Mount Moriah Road. The cottage-style shops offer a low cost alternative to the traditional storefront, giving small business owners the opportunity to market their products and services in a public setting.

In addition to the central gathering space at the Whistlestop Shops, the study area includes several other outdoor spaces to gather. The Roy E. Parks Children's playground is the City's newest park, designed to provide a safe, clean place for children to play, with a mural and brightly colored play equipment. One of the most prominent parks in the study area is R.H. Burel Park on 4th Avenue, best known for its red caboose. Also in the study area is the Auburn Ballpark, located on Mary Carter Avenue which hosts play fields for the Auburn Youth Athletics.

The adjacent map identifies the resources within the study area. While these resources are less than a 10-min walk apart, they feel disconnected due to the lack of pedestrian infrastructure (such as sidewalks and pedestrian crosswalks, particularly at the railroad tracks).

COMMUNITY RESOURCES



NATURAL RESOURCES

The map to the right illustrates the natural features of the LCI study area, including ridge lines, high points, streams, and open space.

Topography

Auburn consists of rolling hills typical of Georgia's upland Piedmont. The downtown is located in a low, flat area between two ridges, approximately 1,000 feet in elevation. The biggest topographic changes in the study area are noted by the green/yellow circles shown on the map to the right. It's not surprising to find the historic downtown commercial strip on one of these high points. It was, and still is, typical practice to form the heart of a community on the high ground. A second high spot is identified on the south side of the railroad, directly across from the downtown commercial strip. Based on historic research, this area once contained commercial structures related to the railroad. The third most prominent high point is found in the

southeast corner of the study area, a location once occupied by a college campus and now the proposed site for a new city hall, once again making use of the natural terrain to elevate the importance of civic features.

Waterways / Stormwater Management

There are no significant bodies of water or wetlands within the study area. The largest and closest bodies of water are Fort Yargo Lake in the Fort Yargo State Park, about six miles away from Downtown Auburn, and Miller Lake at the Little Mulberry Park. A creek is found at the southern portion of the study area, on the property of the proposed city hall development site (reference: Auburn Downtown Redevelopment Strategy and Master Plan). All efforts should be made to keep this creek as a natural amenity to the community.

Additionally, an analysis of potential stormwater management locations within the study area was conducted. The areas identified in orange have the potential to be utilized as centralized stormwater facilities for the downtown as development/ growth occurs.

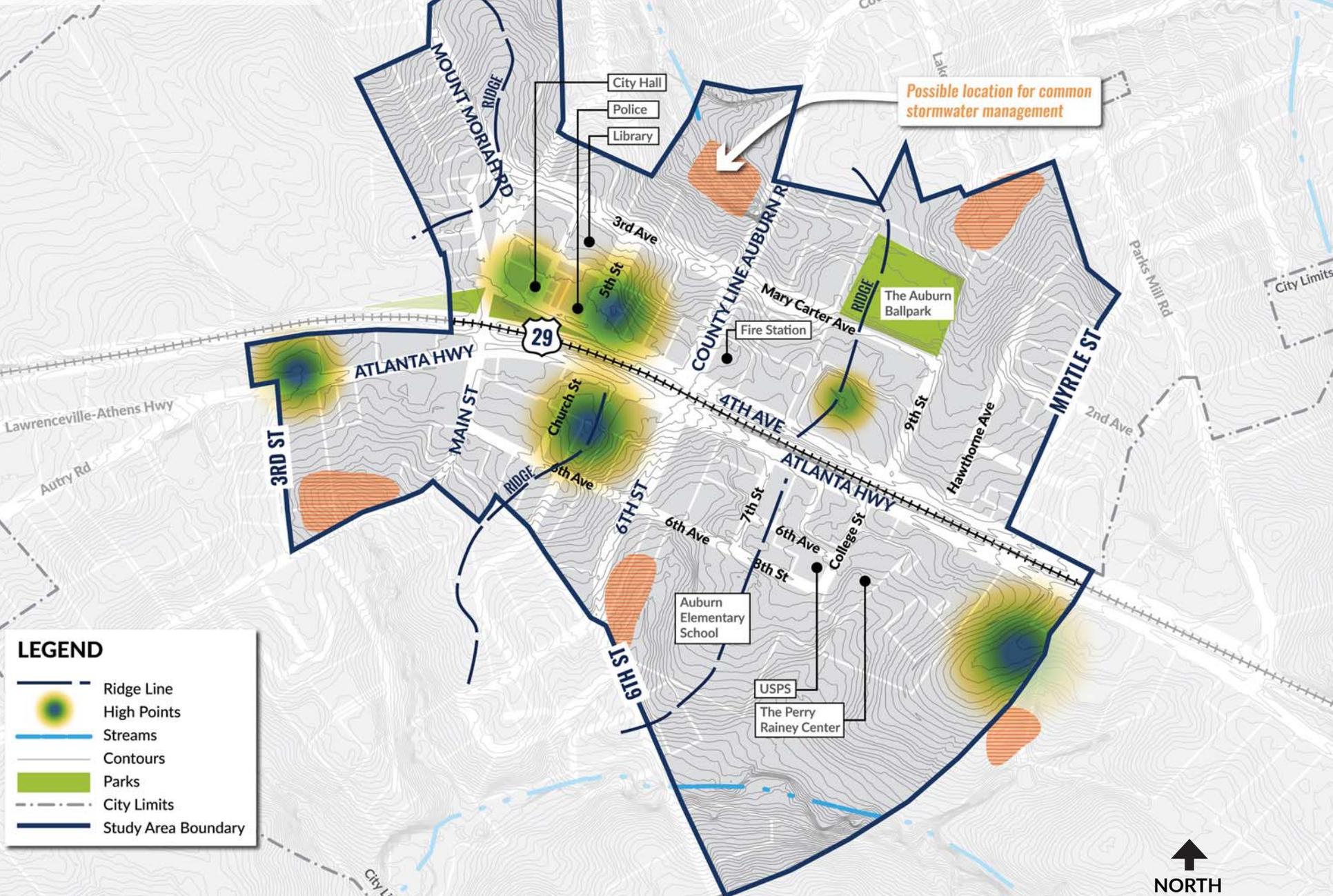
Open Space

The study area includes multiple open spaces including public parks (as reviewed on page 24), pasture, wooded areas, and underdeveloped large house lots. Based on previous studies, it is important to the community to maintain such spaces but also identify areas for potential development. The analysis on page 30 reviews the approach this study takes to identify the development opportunities on these properties.



Current open space to be redeveloped for future City Hall and residential.

NATURAL RESOURCES



LEGEND

- Ridge Line
- High Points
- Streams
- Contours
- Parks
- City Limits
- Study Area Boundary



EXISTING INFRASTRUCTURE

Streets

Minor Arterials and Major Collectors such as Atlanta Highway, Mount Moriah Road, and County Line Auburn Road are key streets on which to focus retail development and streetscape enhancements for all modes of transportation because they connect to many destinations of interest within downtown (reference highlighted roads on adjacent map). Major Collectors carry lower traffic volumes with lower speeds than the Minor Arterials. For Minor Arterials, it is important to consider vehicular movement as well as pedestrians and bicycles, particularly within an urban setting.

Barriers

The combined expanse of Atlanta Avenue, 4th Avenue, and the CSX railroad serves as a barrier between the two sides of downtown. Intersection treatments, such as crosswalks and medians for pedestrian safety, are necessary in order to improve the accessibility of downtown.

Pedestrian/Bicycle Facilities

Except for the southern side of Atlanta Avenue, virtually no other sidewalks exist in the study area. There are small sections of sidewalks sporadically placed along College Street and 4th Avenue but not continuous. There are only three designated crosswalks in the study area, on both sides of the Main Street rail crossing and at the southern side of the 6th Street rail crossing; all other intersections lack crosswalks.

No designated bicycle facilities exist within the study area. This study will review the recommendations on pedestrian and bicyclist enhancement from the 2018 Comprehensive Plan. Some of those recommendations include the following:

- Adopt complete streets and trails plan for walking and bicycling;
- Construct underpass for connectivity across railroad corridor; and
- Prepare and adopt a Bike/Ped/Greenways Master Plan

Railroad Crossings

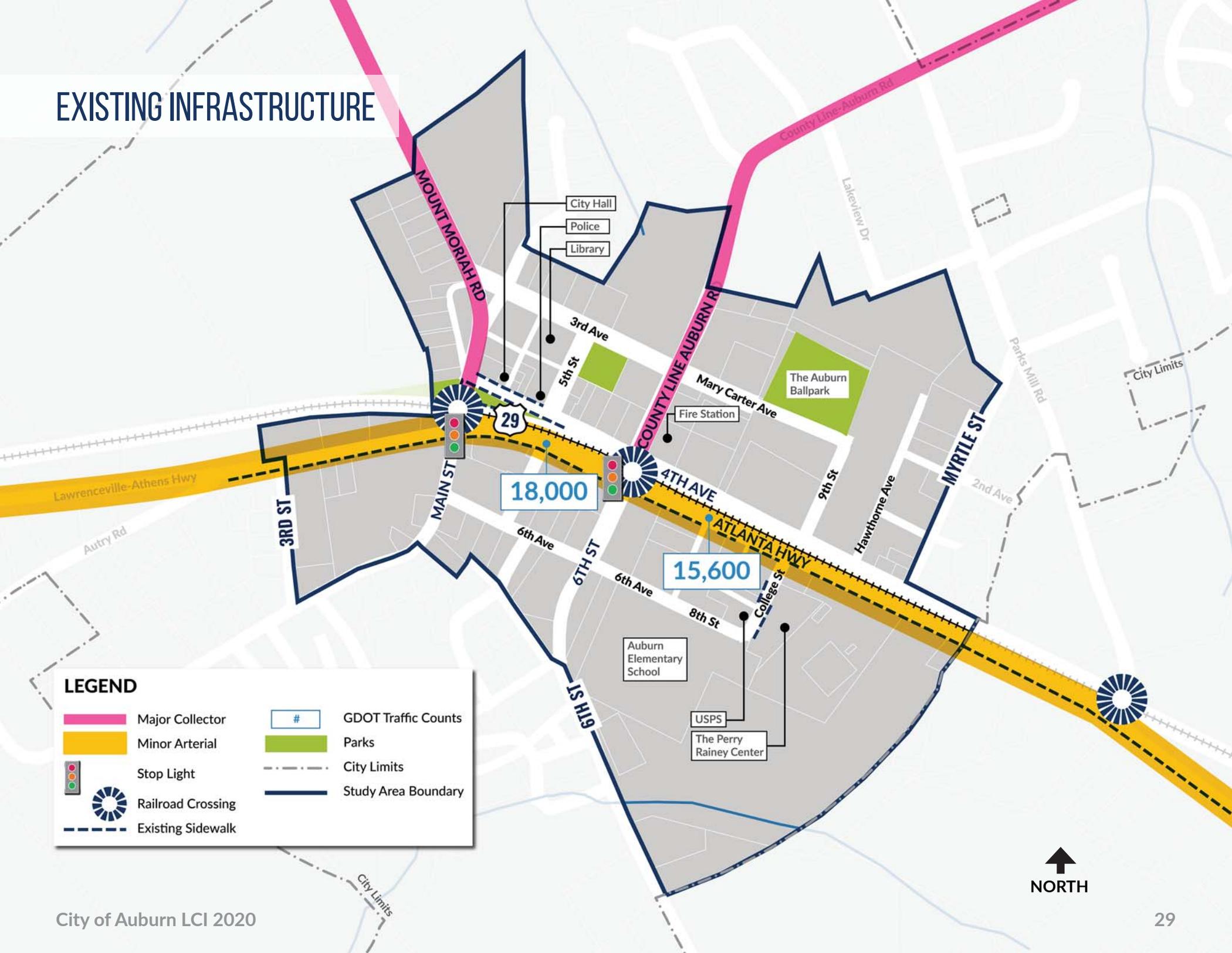
In the study area, there are two railroad crossings—at the intersections of Main Street and Atlanta Avenue (major crossing), and then further south at 6th Street and Atlanta Avenue (minor crossing).

The rail crossings should provide a safe, smooth crossing for vehicles, pedestrians, bicyclists, and those with disabilities. The current crossings, while having existing crosswalk striping on three of the four sides of the railway, are missing sidewalk connections, thus adding to the difficulty for pedestrians, bicyclists, and those with disabilities to cross safely. The city should work with the railroad to implement appropriate pedestrian crossings at each location.



County Line Auburn Road looking south

EXISTING INFRASTRUCTURE



LEGEND

- | | | | |
|---|-------------------|---|---------------------|
|  | Major Collector |  | GDOT Traffic Counts |
|  | Minor Arterial |  | Parks |
|  | Stop Light |  | City Limits |
|  | Railroad Crossing |  | Study Area Boundary |
|  | Existing Sidewalk | | |



SUSCEPTIBILITY TO CHANGE

Many opportunities exist to change the use of parcels and buildings within the study area, as time passes. The map to the right shows the susceptibility to change by parcel for the study area, based on various factors including: in-person site visits and GIS data showing existing land uses. In total, approximately 123 acres, roughly 75% of the land in the LCI study area, is noted as susceptible to change (highlighted on adjacent map in orange and yellow). This map is divided into three categories, which are:

Land Not Susceptible to Change

Parcels not susceptible to change include historic structures not in need of rehabilitation, newly constructed buildings, single-family housing (exception for houses on large lots with ability to be subdivided), and civic uses such as parks and city services. Although noted as “not susceptible to change,” historic structures that are underutilized could represent potential

opportunities for adaptive reuse, while maintaining their historic character. Other parcels are stable and not likely to change in the near future.

Land Somewhat Susceptible to change

Parcels that are somewhat susceptible to change generally include structures that are not historically significant or have historically inappropriate renovations and/or additions, land uses that can relocate, or buildings starting to show signs of deterioration.

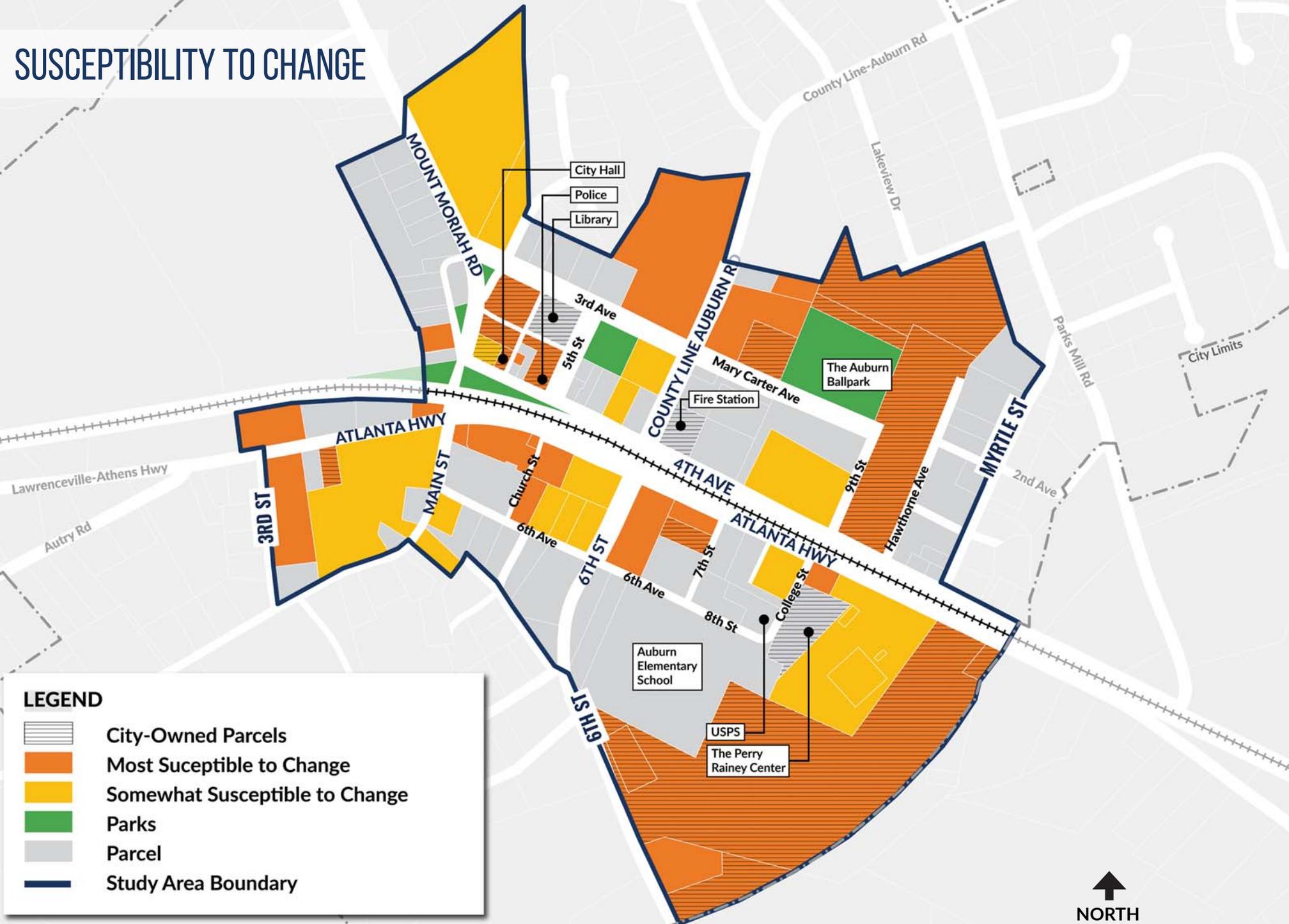
Land Most Susceptible to Change

Parcels marked as highly susceptible to change include vacant land (undeveloped/open space), structures that are distressed or failing, surface parking lots, or development that does not reflect the highest or best use of the land and is not likely to remain for the foreseeable future. A large part of the study area is in this category, and in many cases, is already City-owned property. Some of these City-owned parcels may be prioritized for new development, such as the southern-most parcels in the study area highlighted in Orange, intended as the location for the new city hall development. Publicly-owned land can be a good starting point for catalyst redevelopment projects because negotiations for property acquisition are simplified and the City can collaborate with developers, as is happening with the Auburn Downtown Redevelopment Strategy and Master Plan project currently under way.



Current City Hall

SUSCEPTIBILITY TO CHANGE



ZONING & DEVELOPMENT REGULATIONS // EXISTING

FUTURE LAND USE

The map to the right illustrates the currently adopted Future Land Use designations within the study area, as identified by the 2018 Comprehensive Plan. The Comprehensive Plan breaks down uses into nine designations; only two of those designations fall within the study area boundary: **General Commercial** and **Mixed-Use**.

General Commercial

The Comprehensive Plan identifies General Commercial (red) as representing all types of commercial (such as retail and office) and civic uses. The General Commercial district includes

those commercial uses that require a location accessible to large numbers of people and that serve substantial portions of the community. Typically, as is the case in Auburn, General Commercial uses are situated along major road and thoroughfares.

Mixed-Use

The Comprehensive Plan identifies Mixed-Use (orange) as representing areas for commercial, residential, public, and institutional land. The 2018 Comprehensive Plan explains that the district “...implements a recently developed concept for a large area of mostly residential and civic uses with limited commercial. Approximately 70% of the area will be 5,000- to 10,000 square foot residential lots, with roughly 20% public/institutional (pocket parks, a creek-side greenway, and a village green) and the remainder in commercial and other types of development. The new Auburn City Hall will be located in this area.”

General Overview

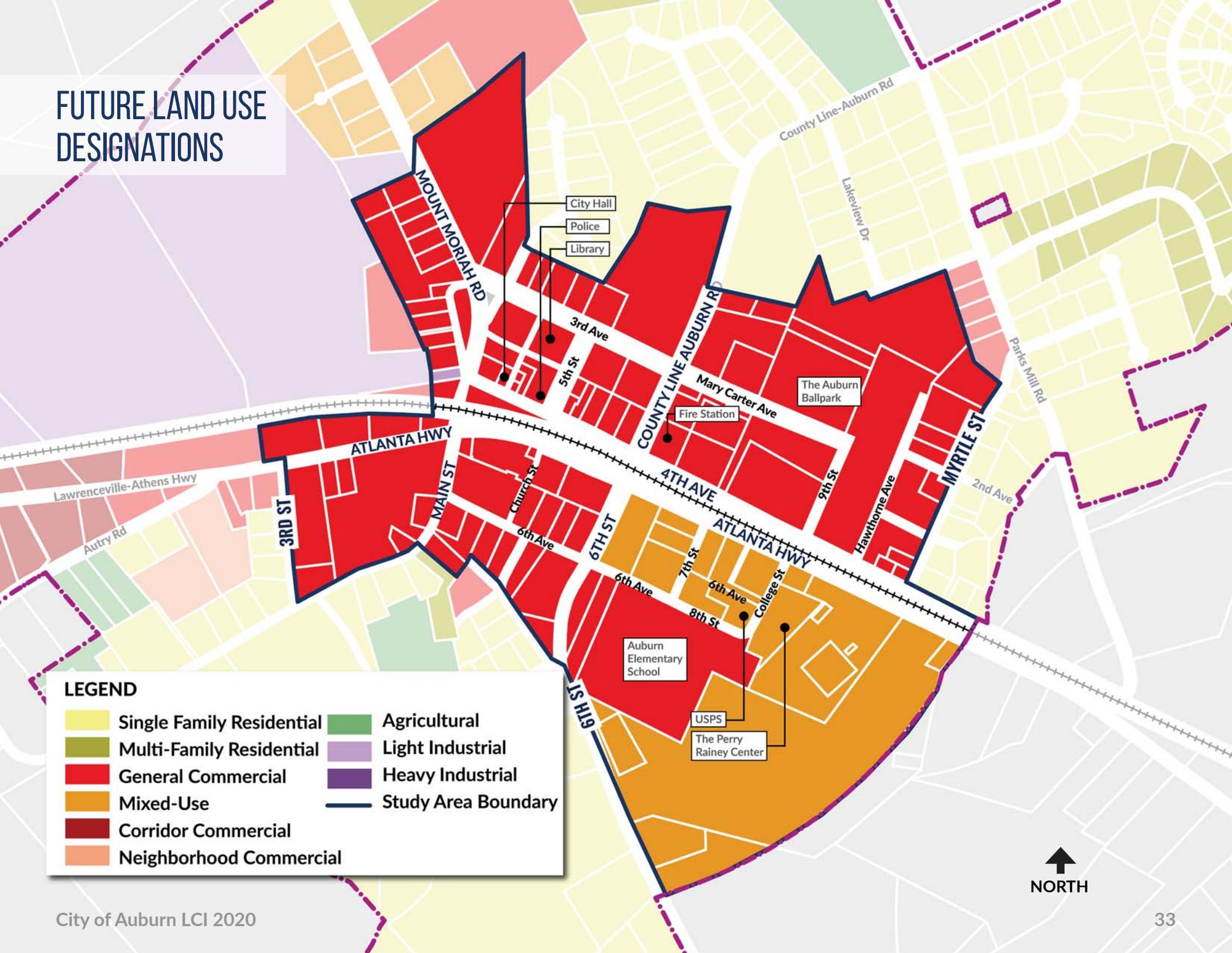
Future Land Use districts, within the study area, will be reviewed in greater detail in the framework plan (see pages 72-75). This will include exploring additional product diversity and allowed active uses for the existing districts; as well as exploring opportunities to add additional districts in an effort to preserve historic single-family residential uses and public open space.

WHAT IS “FUTURE LAND USE”?

While zoning regulations vary, the Future Land Use map is a standardized approach to envisioning and planning for desired scenarios. As such, inconsistencies between future land use designations and existing land use or zoning maps may arise because future land use presents a blueprint for what is to come.

When a proposed project is not compliant with the Future Land Use map, its approval may require amending the map for consistency.

FUTURE LAND USE DESIGNATIONS



LEGEND

- | | |
|---|---|
|  Single Family Residential |  Agricultural |
|  Multi-Family Residential |  Light Industrial |
|  General Commercial |  Heavy Industrial |
|  Mixed-Use |  Study Area Boundary |
|  Corridor Commercial | |
|  Neighborhood Commercial | |



ZONING // EXISTING

The ability of Auburn to implement many of the recommendations in this study is directly dependent on the City's Zoning Ordinance and Development Regulations. Unlike plans, which are often aspirational and non-binding, zoning and development regulations are law, which all developments must follow when building in the community. As a result, it is important to minimize conflicts between plans and the regulations that implement them.

With this in mind, the following summarizes areas in both documents (Zoning Ordinance and Development Regulations) that do not align with the aspirations of the ongoing Auburn Downtown Redevelopment Strategy and Master Plan or with best practices in downtown redevelopment across the region.

ZONING ORDINANCE

The majority of the LCI study area is within the Downtown Overlay District, which contains customized regulations for the city's historic core. Generally, this overlay is consistent with the vision of strengthening downtown Auburn as a mixed-use core featuring housing commercial, and public uses. However, the following opportunities exist to better align zoning regulations with the existing city plans:

Downtown Overlay District: Uses

The current zoning limits grocery stores to 10,000 square feet in size but allows other stores of all sizes. This is unusual, as grocery stores can anchor downtowns and provide daily goods and services, while other big box stores are usually less frequently visited and are more difficult to integrate into a walkable center. For these reasons, this study should evaluate increasing the permitted grocery store size, improved design standards, and whether other retail uses should have a size limit.

Downtown Overlay District: Development Standards

The current zoning code requires each building to have at least one pedestrian entrance along the street. It is recommended to modify this to require a separate entrance for each ground floor business establishment along the street, in the case of a multi-tenant building.

The current zoning does not specify façade materials, other than a provision in Sec. 17.60. 170 for metal buildings. This study should consider whether to specify permitted materials along a street-facing façade that would be consistent with a historic downtown, such as wood or cementitious clapboard, brick, stone, or true 3-coat stucco. Additional materials should be considered along other facades.

The current zoning includes very loosely defined designed standards. This study should consider whether enhanced standards may be appropriate. Examples of the types of things that could be considered include different form-based/building types standards for residential and non-residential buildings, streetscape standards, window requirements, landscaping requirements, and other features.

The current zoning limits setbacks to a maximum of 10 feet from the street. This is appropriate for non-residential buildings but is shallow for residential buildings. This study should consider if alternate standards should be allowed for residential buildings.

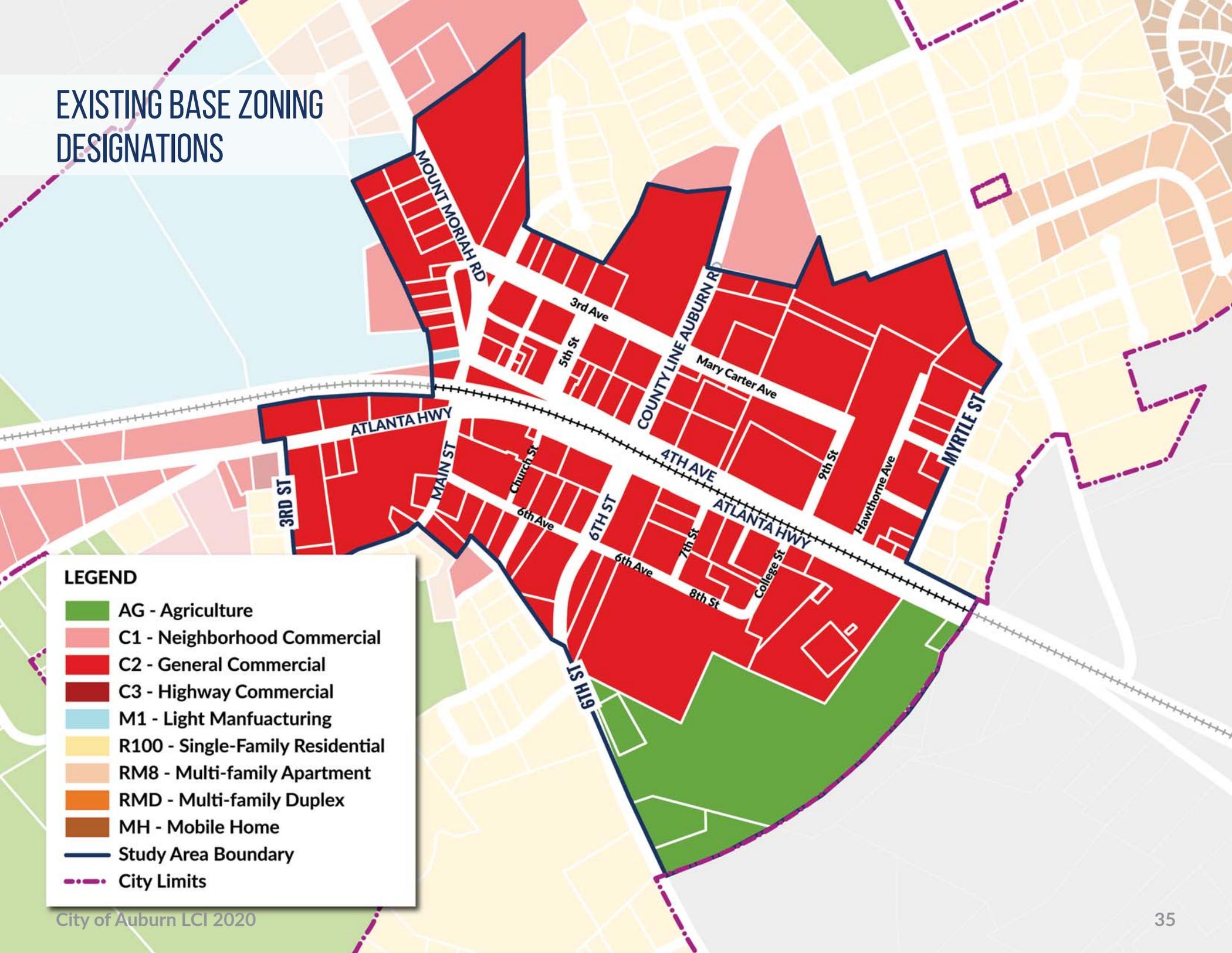
The current zoning defaults to the 10 feet setback of C-2. This is inconsistent with the traditional patterns of historic Auburn, especially along 4th Avenue, and a reduction to 0 feet should be considered.

The current zoning defaults to the 40 feet minimum lot width of C-2. This is inconsistent with the traditional patterns of

EXISTING BASE ZONING DESIGNATIONS

LEGEND

- AG - Agriculture
- C1 - Neighborhood Commercial
- C2 - General Commercial
- C3 - Highway Commercial
- M1 - Light Manufacturing
- R100 - Single-Family Residential
- RM8 - Multi-family Apartment
- RMD - Multi-family Duplex
- MH - Mobile Home
- Study Area Boundary
- City Limits



historic Auburn, especially along 4th Avenue, and a reduction to 20 feet should be considered.

The current zoning limits building height to 45 feet or three stories but does not specify if a three-story building may exceed 45 feet. This should be clarified.

The current zoning does not require the creation of meaningful open space in developments. This study should consider whether to require quality open spaces in all developments over 5 acres in size. Depending on the type and quality, these often range from 5% to 20% of the site.

General Zoning Ordinance: Minimum floor area and garage requirements

The current zoning requires single-family houses to have a two-car garage. This is far more restrictive than required in most communities and should be discussed as part of this study.

The current zoning includes no prohibitions against prominent front-loaded garages along streets. If walkability is truly desired in downtown, standards to require alleys or significant garage setbacks should be explored.

General Zoning Ordinance: Frontages

The current zoning has minimum unit sizes that vary depending on the number of bedrooms. This study should consider whether to reduce or eliminate these.

The current zoning requires all lots to have a minimum of 40 feet of frontage along a street. This is relatively wide for townhouses and small infill “Main Street” buildings. This study should consider whether to reduce this to 20 feet and allow residential lots to front open spaces.

General Zoning Ordinance: Off-Street Automobile Parking and Loading and Unloading Spaces

Several of the current minimum off-street parking requirements are somewhat high, including retail (minimum 5 per 1,000) and residential (minimum 2 per unit). This study should consider reducing these ratios and whether to allow adjacent on-street parking to count towards parking minimums.

The current zoning ordinance’s loading and unloading space requirements are very high. In fact, many communities have eliminated loading requirements in recognition of changing loading trends (e.g. more frequent deliveries with smaller trucks) and the fact that most businesses know exactly how many loading spaces they need to be successful. This study should consider reducing or eliminating these ratios and whether to allow adjacent on-street loading to count towards loading minimums

Development Regulations: Lots

As noted above under “Frontages,” the current development regulations also require lots to front streets. This study should consider whether to allow residential lots to front open spaces.

Development Regulations: Driveways

The current driveway details, which range from 28 to 32 feet in width, are unnecessarily wide for a community where walkability is a stated policy goal.

The current driveway regulations do not allow shared driveways or inter-parcel access. This study should consider whether to require these measures for both their pedestrian and vehicular benefits.

Development Regulations: Sidewalks

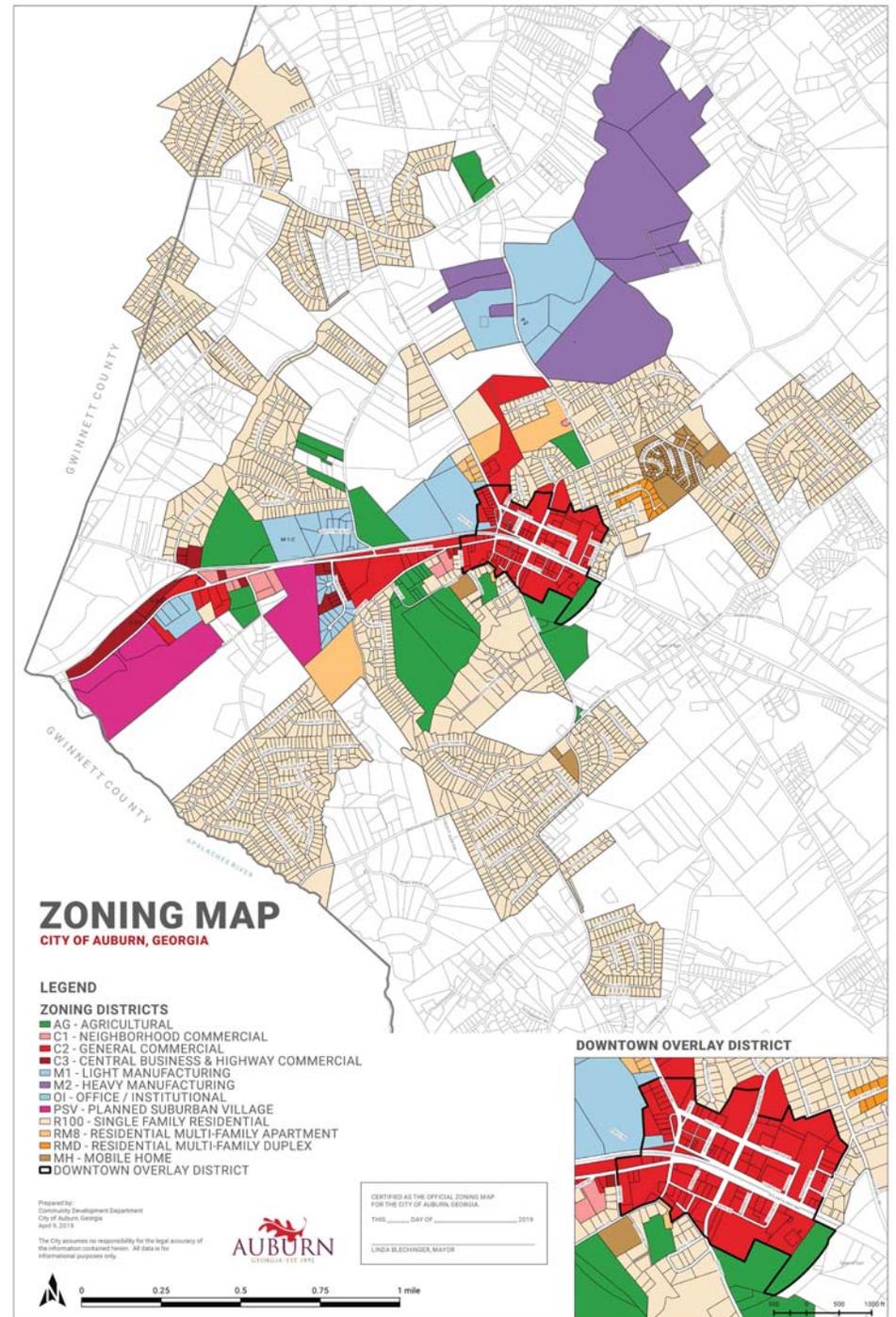
The current C-2 development regulations require sidewalks to be installed with non-residential redevelopment but do not require a specific streetscape with street trees. If walkability is truly desired in downtown, streetscapes with trees should be required with all new development.

Development Regulations: General Layout Requirements

The current regulations discourage alleys and require them to be wider than typical. Sec. 16.28.030.H states, "Alleys shall not be provided except where the subdivider produces evidence satisfactory to the city the need for same. In the event the city approves a design which proposes alleys, the alley shall be constructed as though it were a local street [Table 16.28.020.A identifies Local Residential street as having a minimum 50' ROW and a minimum roadway width of 27 feet] with the pavement width and right of way established by the city to provide for public health, safety and welfare."

Where lots are less than 40 feet in width, alleys should be required, not optional. Furthermore, alleys are usually narrower than public streets, with a typical right-of-way width of 25 feet and a typical pavement width of 15 to 20 feet. This study should consider whether to encourage or require alleys and design standards for them.

The image to the right illustrates the official City of Auburn Zoning Map at the time of this study

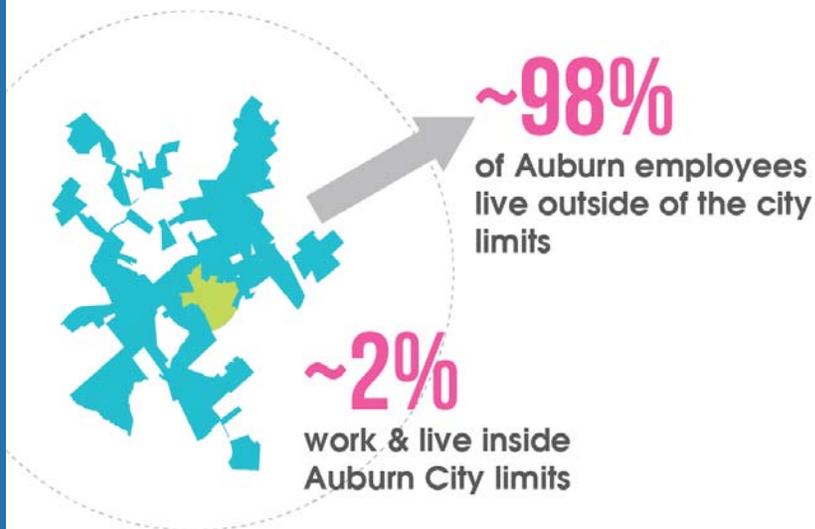


MARKET CONDITIONS //

BUSINESS & EMPLOYMENT

Commuting Patterns

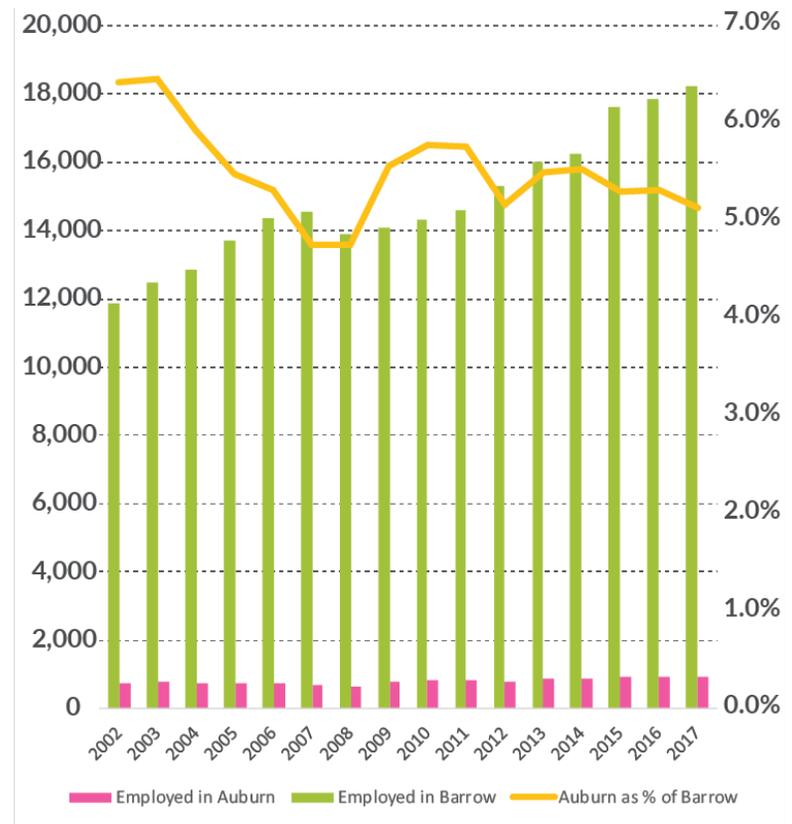
According to the US Census, there are 1,004 employees in the City of Auburn and approximately 936 of these employees (98%) live outside of Auburn and about 68 employees (1.9%) work and live in Auburn. There are 3,537 working residents in the City of Auburn and approximately 3,469 residents (98.1%) who live in Auburn are employed elsewhere.



Employment Trends

Employment within the City of Auburn has remained very flat over the course of the last two decades and makes up just over 5% of Barrow County's total employment. Historically employment in Auburn as a percentage of Barrow County has slowly decreased while Barrow County has experienced steadily increasing employment over the past 15 years, rising from 11,838 in 2002 to 18,219 in 2017, for a net gain of 53.9%.

>> Employment, 2002 to 2017



Employment By Sector

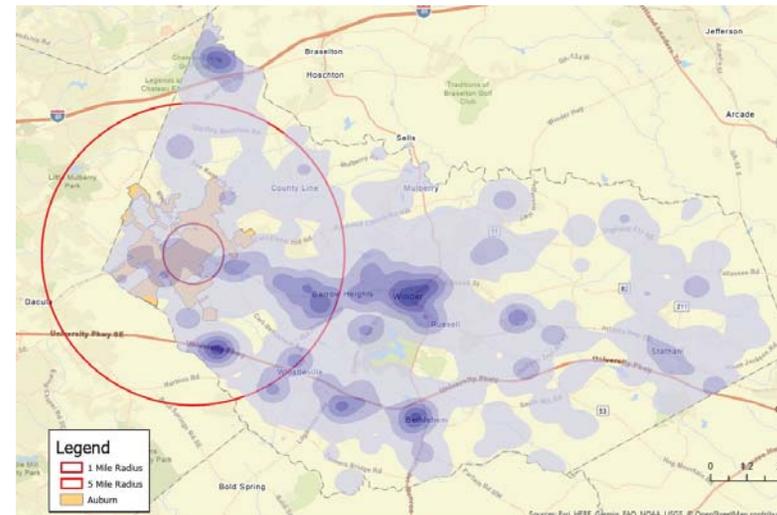
All of the area studied shows a relatively similar composition of jobs. The Primary Market Area has a slightly higher percentage of management jobs than other areas, but a lower fraction of office and administrative support jobs. Barrow County a smaller percentage of sales jobs than the other areas. Office and administrative jobs make up almost one fifth of all jobs in Auburn and Barrow County. The employment sectors shown below represent some of the more high-paying job categories.

Regional Employment Distribution

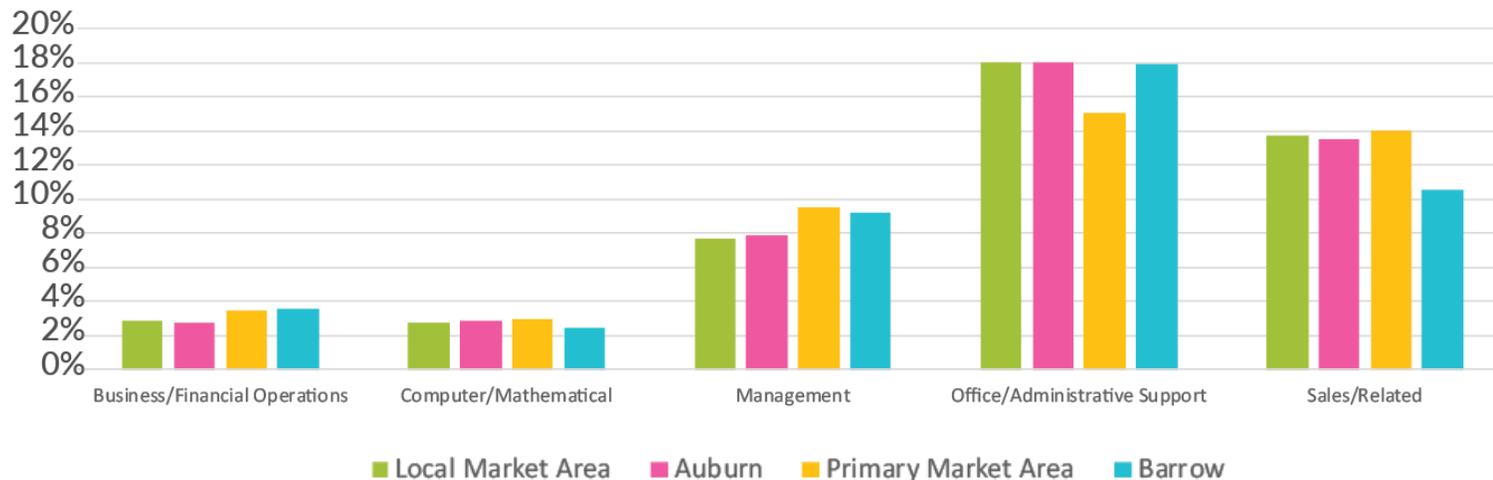
The map to the right shows the density of employment in Barrow County in 2017. This distribution of jobs illustrates that employment and development has tended to expand along the Highway 316 corridor, as well as other transportation corridors. Highway 29, which bisects the LCI study area, also shows strong employment growth, as it links Gwinnett County to Barrow County and other eastward counties.

Although employment density has increased in many areas throughout Barrow County, Auburn itself has seen only a slight increase in employment density.

>> Distribution of Jobs in Barrow County, 2017



>> Employment By Sector, 2019



HOUSING ASSESSMENT

Single-Family Housing Assessment

Within the Primary Market Area, most households own their homes. Approximately 92% of all residential units are owner occupied. The nearest multi-family properties are outside the Primary Market Area and are located along I-85, in Lawrenceville, and in Winder.



Auburn has seen few new homes come to market in the past decade, due to a lack of construction, however hundreds of new for-sale homes, in and around Auburn are now under construction. Much of this growth in residential sales within the Primary Market Area, is located within Gwinnett County and not Barrow County. Due to Auburn’s close proximity to these sales, similar developments could likely capture higher price points than Barrow County averages.

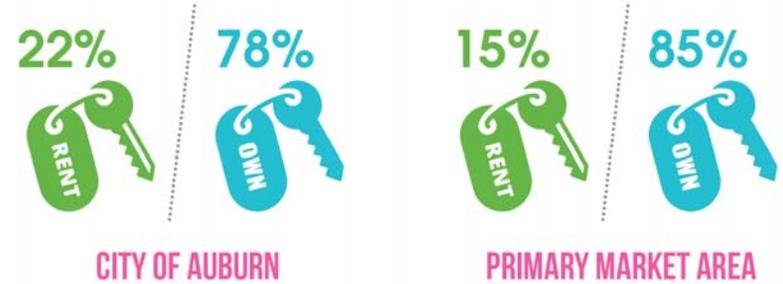
Housing Tenure

Housing in the Primary Market Area is dominated by owner-occupied homes (85%) which is even higher than the 78% in Barrow County. Auburn has a high homeownership rate (78%), but it is somewhat below that of the Primary Market Area.

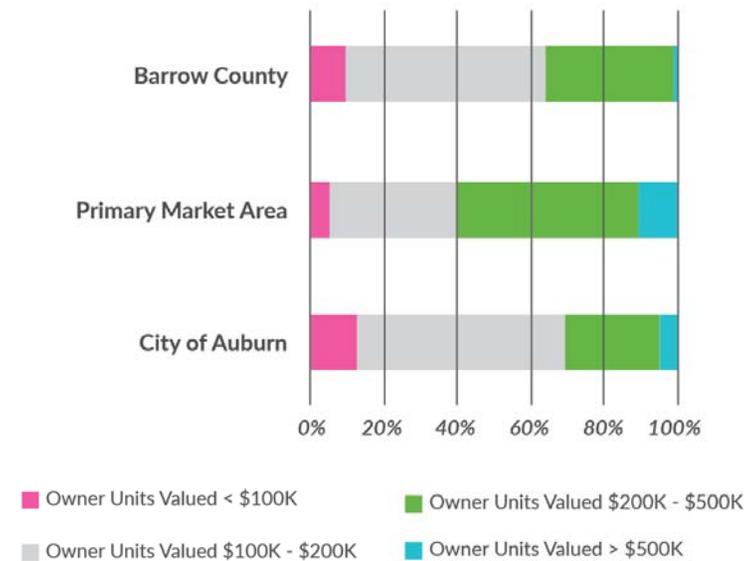
Housing Value

Half of all homes within the Primary Market Area are valued between \$200,000 and \$500,000. The second largest price group for that area of study is the \$100,000 to \$200,000 range, which makes up 34% of the housing. Homes valued over \$500,000 make up 11% of the Primary Market Area stock.

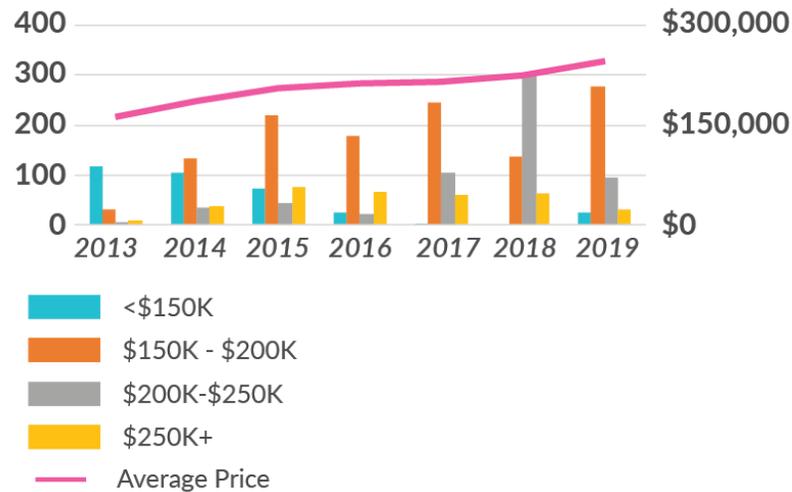
>> Housing Tenure: Renter vs. Owner Occupied, 2018



>> Distribution of Current Home Values



>> Barrow County New Construction Single-Family Detached Closings by Price



Auburn, by comparison, has far more homes in the \$100,000 to \$200,000 range, at 56% of its total housing stock. The vast majority of homes in Barrow County fall into the \$100,000 to \$500,000 range, at 85%.

Building Permits

Barrow County reached the peak of its residential building boom in 2005. Amidst recovery from the great recession, 2011 saw a renewed interest in multi-family rental housing throughout the county. This dovetails with a national trend in which apartments are becoming a larger part of the overall new housing market post-great recession. Notably, multi-family growth throughout Barrow County over the past nine years has primarily been concentrated within the incorporated areas.

Typically, cities have denser zoning which is more attractive and feasible to multi-family developers; however, Auburn has been an exception to this.

New Construction Home Sales

Selling prices for homes within the Primary Market Area are considerably higher than in Barrow County overall. The average sales price in the Primary Market Area was 39% higher in 2019 than in Barrow County, which is partly due to the strong demand in Gwinnett County. It is reasonable to assume that Auburn could capture a portion of this eastward-moving demand from Gwinnett County.

>> Barrow County-wide Residential Building Permits by Type, 2005 - 2019



Average prices in the Primary Market Area have continued to show strong growth over the past six years, while that of Barrow County has had a more modest trajectory. This is in spite of the fact that Barrow County has had more growth in the number of closings, both as a percentage and in absolute volume, from 2014 to 2019.

Within Barrow County, there have been over 2,500 single-family detached home sales since 2013. The average sales price of new homes sold has risen 51% during the last six years to \$247,000 in 2019. New construction homes are getting pricier by the year. For example, homes valued less than \$200,000 were 72% of all sales in 2013, but in 2019 this price band of homes declined to just 6% of sales. In addition, pace has increased dramatically since 2013, although closings have subsided from the 2018 peak of 502 homes sold.

Value Per Square Foot

New homes in Barrow achieve slightly higher prices per square foot than Winder, while the Primary Market area achieves substantially higher prices per square foot. Gwinnett County achieves prices per square foot that are 19% higher than Barrow County, at \$129. The Primary Market Area achieves prices per square foot that are 11% higher than Winder.

Geography	Average Price	Average SF	Price per SF
Barrow	\$246,416	2,303	\$108
Gwinnett	\$363,144	2,893	\$128
PMA	\$346,294	2,972	\$119
Winder	\$242,772	2,235	\$107

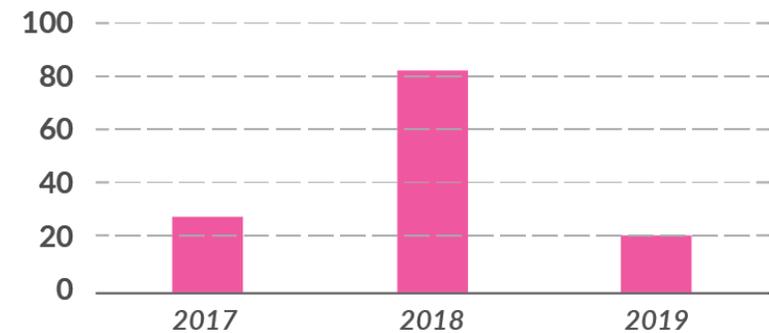
Housing Sales

Subdivision Development

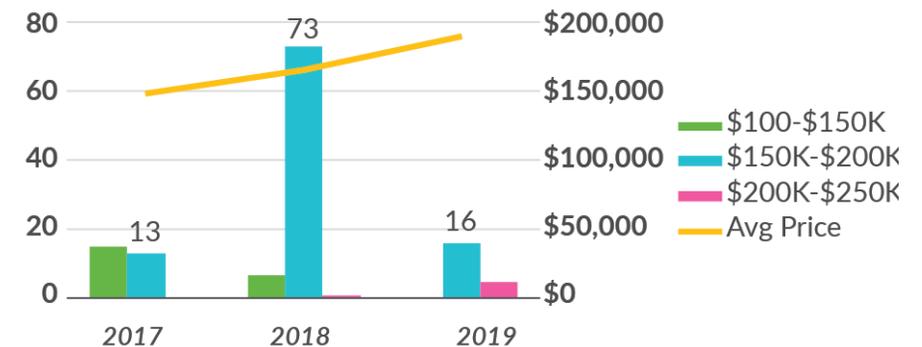
There were a total of 13 new home sales by subdivisions near the City of Auburn in Barrow between 2017-2019. The sales occurring in the Gwinnett County portion of this Market Area are higher both in terms of value and volume.

The Gwinnett County portion of the 30011 and 30019 zip codes have added 511 homes since January of 2017, while the 30011 zip code in Barrow County has added only 18 homes. Of the 511 homes built in Gwinnett County over the past three years, 300 were in the \$300,000 to \$400,000 price range.

>> Barrow County New Townhouses Closings by Year



>> Barrow County New Townhouses by Price



Townhouses Assessment

New Construction Home Sales - Barrow County

At the time of this study, within Barrow County, there have been 130 townhouses built and sold since 2017, all of which are in the Turtle Creek Villas and Northside Commons. Turtle Creek began delivering first in 2017 and is responsible for the majority of townhouses closings – about 91%. In comparison, sales at Northside Commons launched in 2018 but absorption ramped up in 2019, outpacing Turtle Creek 3:1 last year. Despite selling 33% less new construction townhouses in 2019 than in 2017, the average sales price county-wide has risen 27% during the last two years to \$189K in 2019.

Multi-family Assessment

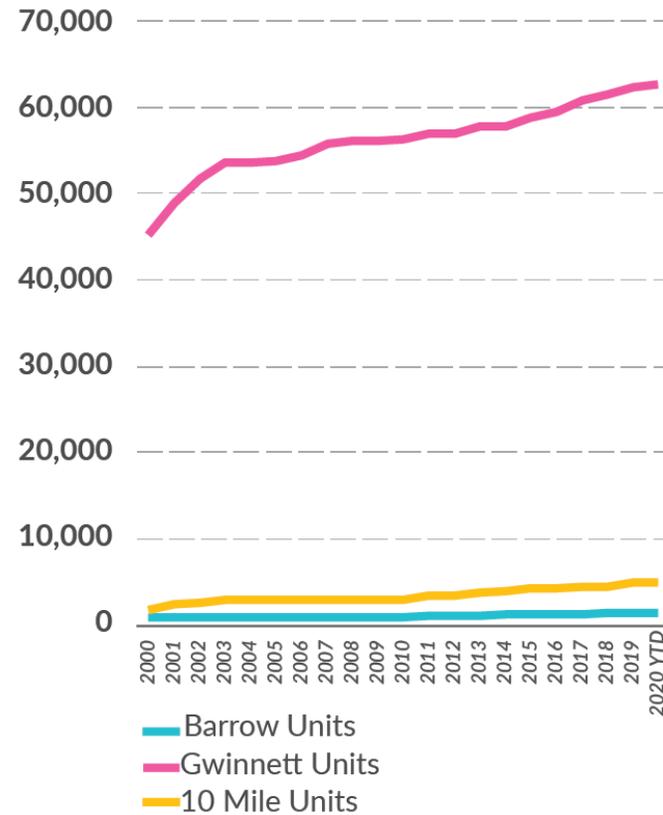
Overview

Due to the very small number of multi-family apartments in the immediate area around Auburn, for the purposes of this analysis, a 10-mile radius was used as the multi-family market area relevant to downtown Auburn (see page 21). Due to the lack of additional inventory, vacancy rates in Barrow County have decreased steadily, and are now well below those of Gwinnett County. Rents in each of the three areas studied for multi-family have all followed a similar trajectory, albeit with divergent levels of monthly rents, with those of the 10-mile area leading, followed by Gwinnett, and then Barrow County.

Apartment Construction

Unlike Barrow County, Gwinnett County has seen a steady, consistent increase in the number of apartment units constructed during this economic cycle, while the 10-mile radius around Auburn has experienced a more modest rate of addition. The total number of apartment units in Barrow County is just 2.3% of the Gwinnett County total.

>> Total Apartment Units



Apartment Vacancy

Barrow County has seen a slow decline in apartment vacancies during this economic cycle, and has recently seen its vacancy rates drop below those of Gwinnett County, as well as that of the 10-mile radius around Auburn. The broader 10-mile radius around Auburn has had a highly variable vacancy rate over the past decade, with construction of new units seesawing with increases in demand.

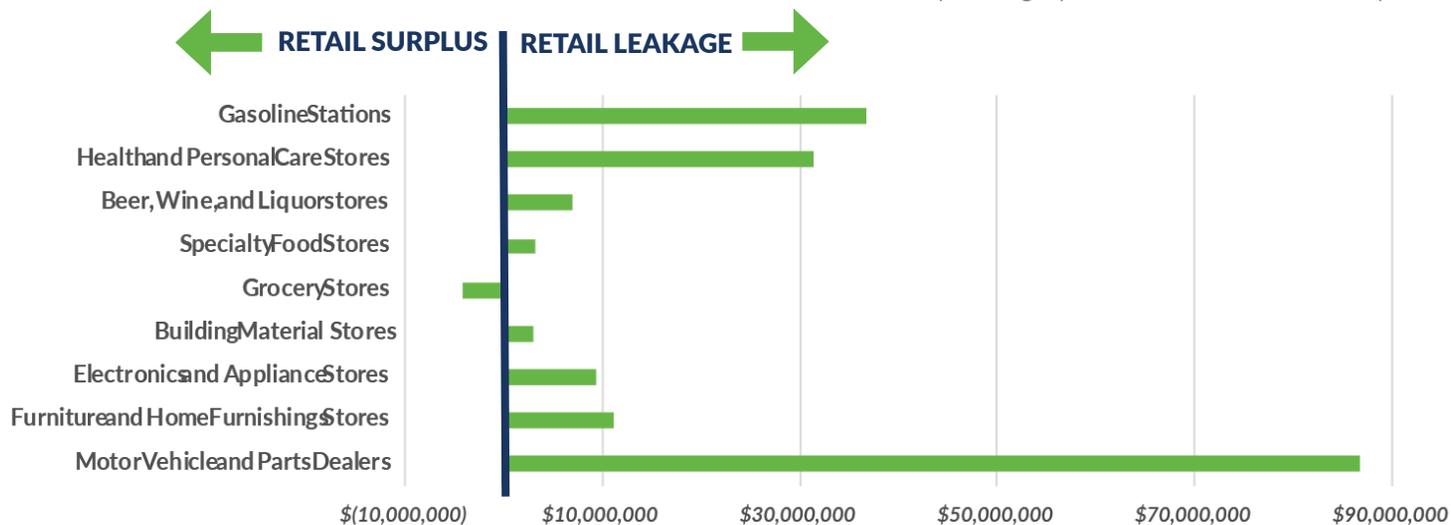
Apartment Rents

Monthly rents for apartments in each of the three areas studied have all seen a very similar trend: flat rents prior to the Great Recession, followed by a dip between 2008 and 2010, and then a continuous increase in the years since. The 10-mile radius around Auburn currently outperforms Gwinnett and Barrow counties. It exceeds rents in Gwinnett County by 10%, and those of Barrow County by 48%.

All Developments

Auburn and the Primary Market Area currently have no market-rate apartment complexes. There is, however, one 64-unit senior living complex within Auburn city limits. The closest market-rate apartment complexes are located in Winder, Lawrenceville, and alongside I-85. Within the broader 10-mile radius, there are several newer apartment complexes built since 2000 in Gwinnett County and generally along I-85, while Winder has a fairly large inventory of pre-2000's apartments.

>> Retail Leakage by Retail Category



RETAIL MARKET ASSESSMENT

Retail inventory in the City of Auburn and the Primary Market Area has remained flat over the past decade, while steadily increasing in Barrow County. Despite the lack of additional inventory, vacancy rates in Auburn have increased, spiking during the Great Recession, and slowly recovering since. Retail rents have been flat, and have even dropped somewhat in Auburn following the Great Recession, while those of Barrow County overall have generally improved over the past decade. Within the Primary Market Area, almost half of all retail demand is being met by stores outside of the area.

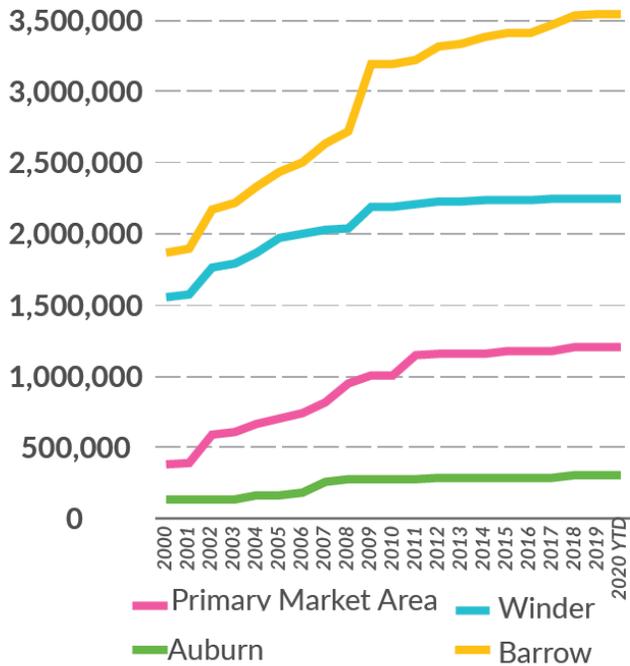
The graphic below is the difference between demand and supply for retail by store type in the Primary Market Area; opportunity for more retail inside a specific area, otherwise known as retail leakage, occurs when there is more spending (demand) from households who reside in that area than sales (supply) in the area. There is retail leakage for almost all store types, excluding grocery stores; leakage for the remaining stores would be reduced if additional stores opened in the study area. Total retail spending by households in the Primary Market Area

is \$969.6 million, of which \$533.7 million occurs within the area; this equates to a net leakage of \$435.9 million.

The Primary Market Area has 101 retail buildings, with 1.1 million SF of space. Retail space in Auburn makes up a very small percentage of the total in Barrow County. The Primary Market Area retail space supply has remained relatively unchanged since 2011, though in the time leading up to the Great Recession, annual growth in retail space was tracking with that of Barrow County.

Auburn has seen very minimal additional retail space created since 2011, similarly to Winder. Barrow County overall has witnessed its supply of retail space continue to grow, albeit at a modest pace.

>> Total Retail Space (SF)



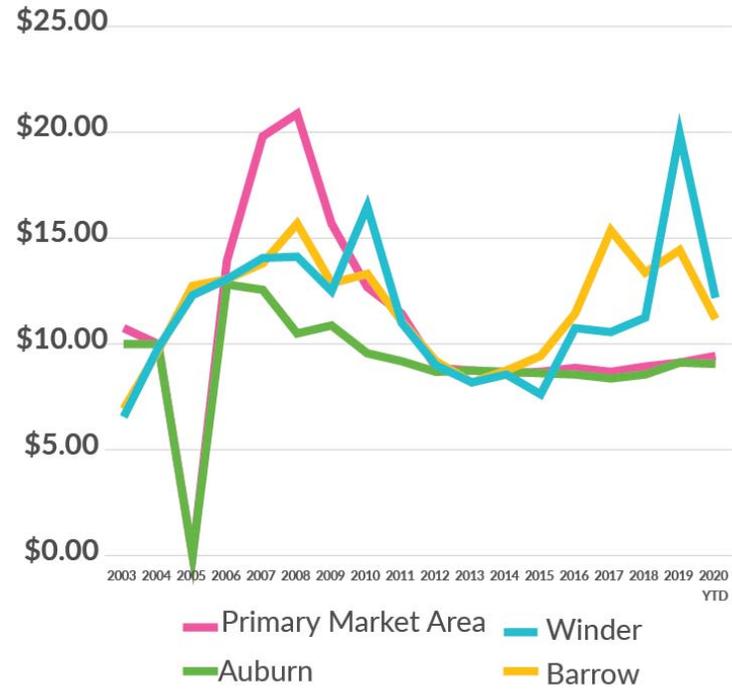
Retail Vacancy

Vacancy rates in the City of Auburn spiked during the Recession. While slowly recovering, vacancies in the city currently remain much higher (around 25%) than elsewhere in the region (5-7%). Prior to the Great Recession, vacancy rate in Auburn were variable, but tended to be relatively close to that of Winder and Barrow County overall. The vacancy rate of retail in Winder is currently 5.8%, roughly one-fifth of that in Auburn.

Retail Rents

Rents in Auburn have generally been somewhat lower than those in the larger Primary Market Area and Barrow County. As the economy has recovered and the rents have increased in Winder and in Barrow County overall, rents have stayed flat for Auburn. Rents in Auburn are lower now than in the immediate lead-up to the Great Recession.

>> Retail Space Rents/SF



OFFICE MARKET ASSESSMENT

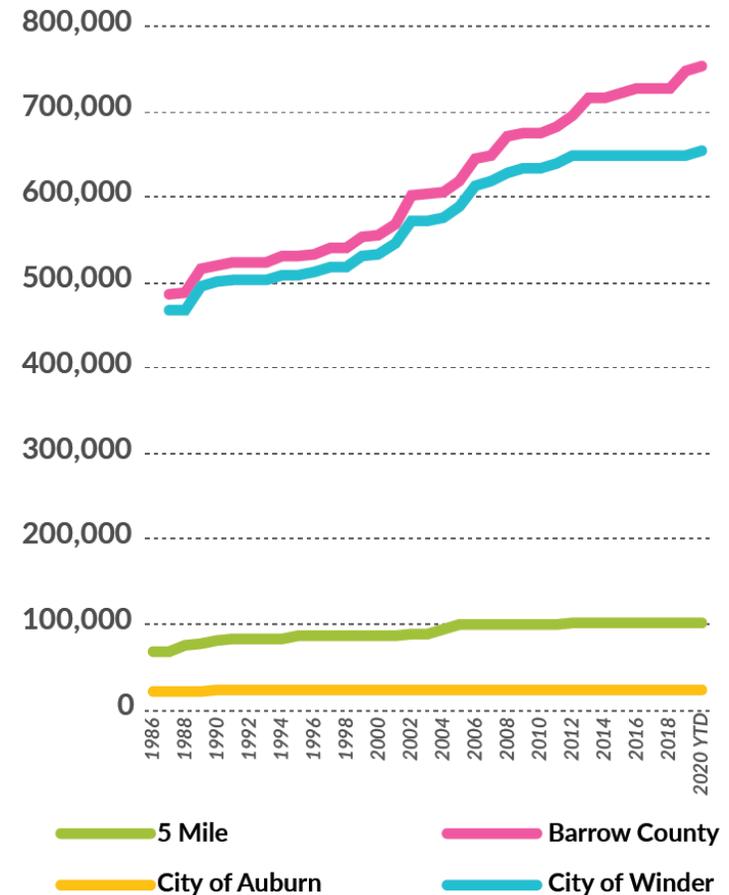
Auburn has added no office space in the past decade, while some growth has occurred in unincorporated Barrow County. Winder contains the vast majority of office space in Barrow County, and has continued to add office space over the past decade. The Primary Market Area has added only modest amounts of office space since the Great Recession. Vacancies have generally declined across all studied areas, while rents have consequently increased of late.

Office Construction

Barrow County has had steady growth of office space since the 1980s. Most of the additional supply has been developed within the City of Winder. Very little growth, compared to Winder, has been experienced in the Primary Market Area in terms of office supply.

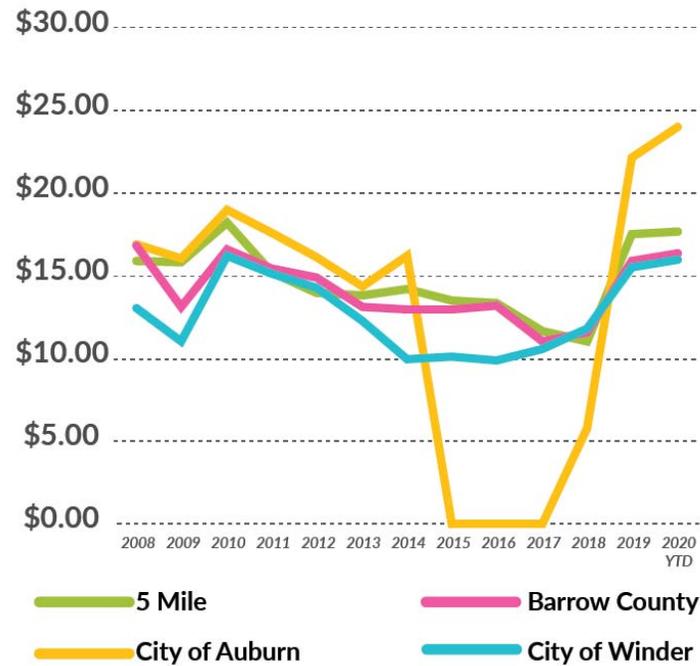
Only 2,200 new square-feet of office space has been developed in the Primary Market Area since 2006, and none has been developed in the City of Auburn in that time period.

>> Office Inventory by SF



4th Avenue Retail Buildings

>> Office Space Rents Per SF



Office Vacancy

Office vacancy within Barrow County, the City of Winder, and the City of Auburn has been on a generally declining trend since the Great Recession. While office vacancy in those same areas has tended to be relatively low over the past decade, Auburn has experienced a recent spike in office vacancy.

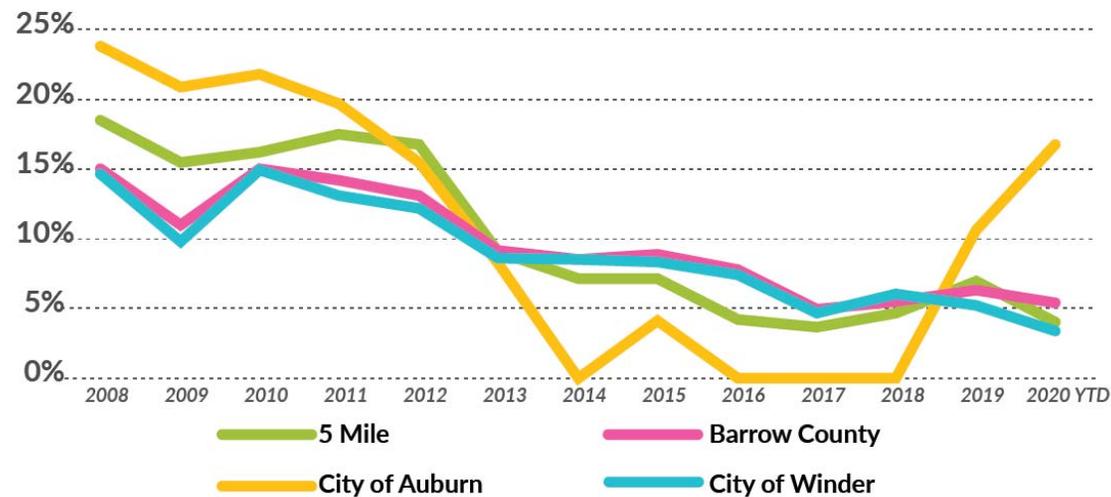
The amount of office supply in Auburn is quite small, which would make any change in vacancy appear to be drastic.

Office Rents

Rents in Auburn have generally tracked with those of the larger Primary Market Area and Barrow County. Rents appear to have dropped for a time in the City of Auburn, including a period between 2015 and 2017 in which no data seems to have been collected, but they have recovered strongly of late.

Compared to Winder, office rents in Auburn seem to average substantially higher from year to year.

>> Office Vacancy Percentage



..... SUMMARY RESULTS: KEY FINDINGS

KEY FINDINGS

Additional development in a walkable mixed-use format in Downtown Auburn has an opportunity to further enhance the town’s historic attributes and refine the town’s sense of community for residents and visitors. The overall development pattern for new real estate offerings in the downtown area should include:

- New for-sale housing, and rental housing in later phases
- Varied and unique residential housing types including small lot homes with front porches that face an open lawn at multiple price points
- A central gathering space for concerts, farmers markets, festivals, etc. that is constantly programmed with activities
- A trail system that connects the central gathering space to neighborhoods and new pocket parks.



REAL-ESTATE DEVELOPMENT OPPORTUNITIES

Phase 1 (Years 1-5)

- Establish the area adjacent to the new city hall site as a residential location
- Build off the initial success of the Whistlestop Shops as way to continue to incubate small-scale experiential retail in the historic downtown area.
- There is likely some opportunity for additional office development in Phase 1.

Phase 2

- Opportunity to expand housing types
- Consider current Whistlestop Shops location for new development and shift Whistlestop Shops program to site adjacent to new city hall to help to incubate new retail there.

Potential Development Timeline Based on Potential Absorption Analysis

	Year 1 - 5	Year 6+	TOTAL
Owner (Units)	125	125	250
Rental (Units)		200	200
Senior (Units)	100		100
Retail (Sq. Feet)	15,000	25,000	40,000
Office (Sq. Feet)		15,000	15,000

FOR-SALE

Downtown Auburn can expect to absorb 25-30 new for-sale units annually.



- The majority of new homes should be priced between \$200,000-\$300,000.

This new development could achieve higher prices than the current Barrow County median if located in or near a vibrant downtown.

- These “walkable” offerings would be a new product type not currently available in this area. This new development will tap into the eastward growth of Gwinnett County.

RESIDENTIAL OPPORTUNITIES

RENTAL

Longer-term, Downtown Auburn could also benefit from rental development.



- As the downtown community develops, Auburn could capture a portion of the market area’s rental demand and support the development of a 200-unit apartment complex in Downtown Auburn.
- In the near term, it is likely the downtown area could support a 100-unit active-adult/senior housing facility.



RETAIL

Short-term (1 to 5 years), Downtown Auburn could absorb:



- 8,000-10,000 SF of restaurant space in a walkable setting and up to 5,000 SF of specialty local retailers in a walkable setting.

Longer-term, Downtown Auburn could absorb:

- 8,000–10,000 SF of additional restaurants, about 10,000-12,000 SF of additional specialty local retailers, and approximately 5,000 SF drug store.

COMMERCIAL OPPORTUNITIES

OFFICE

As Downtown Auburn matures, there will likely be opportunity for small-scale office development.

- New office development would capitalize on the vibrancy and walkability of a revitalized downtown. These offices would likely be targeted towards smaller, local businesses.
- There is likely an opportunity for 10,000-20,000 SF.



POTENTIAL ABSORPTION FORECAST //

POTENTIAL ABSORPTION FORECAST

Real-Estate Demand Assessment

Real estate demand forecasting is based on a series of assumptions and questions.

- What has happened in the past and will those trends continue into the future?
- How much demand for real estate will be driven by simple population, household, and employment growth?
- How will changing market trends and consumer preferences shift the demand patterns of the past?
- Will aging and obsolete buildings be redeveloped or updated?

- As the character of Downtown Auburn changes, will people and businesses be induced to change the way they have done things in the past?
- What share of the overall demand for real estate could potentially be “captured” by Downtown Auburn?

This analysis prepared demand forecasts for two sectors: Residential and Retail

These forecasts look at market absorption potential (future demand) for the Primary Market Area, defined as a 5-mile radius from Downtown Auburn, and then determine the potential “capture” that the LCI Study Area can achieve of that overall PMA absorption potential.

Residential Demand

Residential demand is driven by population and household growth; consumer preferences; available land and sites; latent demand (existing demand that is unmet); and induced demand.

Based on current trends, the Primary Market Area is expected to add 251 new households annually over the next five years from household growth. In addition to those households we can expect to see aging and obsolete housing units replaced by newer units. New housing growth will likely follow slightly different patterns than past development.

Based on land availability and market trends, it is expected that:

- Demand for new types of single-family homes and townhouses will increase.
- Demand for multi-family will follow.



Parks-Hawthorne House

- The Study Area will become more desirable over time.
- This will induce new demand from outside the Barrow County and market area, much of which will be specifically attracted to the downtown area's unique and walkable character.
- The conclusions outlined below regarding potential real estate performance assume that Downtown Auburn continues to evolve into a well-executed compact walkable environment.

Development in the Auburn LCI study area could likely expect to absorb/sell 25-30 for-sale units annually at price points of \$200,000 and above. Approximately half of this potential (12 – 15 units) is for homes priced in the \$150,000-\$250,000 range. It is expected that initial pricing would begin in the low \$200's.

- 30% of this potential (7-10 units) is for homes priced \$250,000-\$350,000.
- The remainder of potential demand comes from households that can afford homes priced above \$350,000.

The Auburn LCI PMA shows market demand potential of 365 new units of rental housing per year across all price points. As the Downtown Auburn area matures, the area will be able to absorb a portion of this demand. Assuming Downtown Auburn could capture 25% of the Auburn LCI PMA rental demand in the longer-term, there is likely potential for a 175-200 unit market-rate apartment development and a 80-100 unit senior rental community.

Commercial Demand

Demand for retail space is driven by household consumer spending.

Downtown Auburn has the potential to capture retail spending from current and future households in the market area, as well as those that visit Auburn from outside the area, particularly those that are nearby in Barrow County.

- This spending demand, if captured in Auburn, can account for nearly 40,000 SF of new retail space over the next five years. It is anticipated that Downtown Auburn could immediately absorb 8,000-10,000 SF of restaurant and ~5,000 SF of specialty local retailers, with the remaining retail coming in later phases.
- Additionally, there is an opportunity for approximately 15,000 square feet of local-serving office space over the next five years.

>> Forecast of Retail Space Potential

RETAIL DEMAND FORECAST	PRIMARY MARKET AREA	BARROW COUNTY
Population 2020	51,653	83,503
New Population 2020-2025	4,112	6,526
Retail Spending 2020	\$ 969,640,585	\$ 863,405,965
Retail Spending 2025	\$1,046,831,882	\$1,041,748,951
New Spending 2020-2025	\$77,191,297	\$ 178,342,986
Auburn LCI Area Capture	5%	3%
Downtown Auburn Market Area Capture	\$ 3,859,565	\$5,350,290
SF Demand @ \$300/SF	12,865	17,834
LCI Area Net Demand 2020-2025	30,700	
Additional Outside Capture @ 30%	9,210	
Total Auburn LCI 5-Year Retail Demand	39,909	