

City of Chamblee, Georgia

**TARGET INDUSTRY AND  
CLUSTER ANALYSIS FINDINGS**

**STRATEGIC ECONOMIC  
DEVELOPMENT PLAN**

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Presented By:

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RKG Associates, Inc.

The logo for RKG Associates Inc. features the letters "RKG" in a large, bold, red, sans-serif font. Below "RKG", the words "ASSOCIATES INC" are written in a smaller, black, all-caps, sans-serif font. The logo is positioned in the bottom right corner of the slide, partially overlapping a vertical red bar that runs down the right side of the page.

**RKG**  
ASSOCIATES INC

# WORK COMPLETED

- **Kick-Off meeting**
- **Initial stakeholder interviews**
- **Socioeconomic/Economic Base Analysis**
- **Non-Residential Market Analysis**
- **Opportunity Sites Analysis**
- **Target Industry and Cluster Analysis**

# COMPETITIVE ASSETS/CONSTRAINTS ANALYSIS

# NOTABLE COMPETITIVE STATE ASSETS

- **Georgia very strong in attracting businesses from out-of-state**
  - Cost of doing business (3<sup>rd</sup>)
  - Incentives (1<sup>st</sup>)
  - Corporate tax Environment (7<sup>th</sup>)
  - Access to capital/project funding (3<sup>rd</sup>)
  - Favorable regulatory environment (1<sup>st</sup>)
  - Availability of skilled labor (2<sup>nd</sup>)
  - Labor costs (2<sup>nd</sup>)
  - Quality of life (5<sup>th</sup>)
  - Distribution and supply chain hubs (1<sup>st</sup>)
  - Highway accessibility (4<sup>th</sup>)
  - Competitive utility rates (2<sup>nd</sup>)

# NOTABLE COMPETITIVE STATE ASSETS

- **The State also has competitive quality of life/microeconomic assets compared to other states**
  - Business & Jobs
    - Microenterprise Ownership Rate (5<sup>th</sup>)
    - Average Annual Pay (\$50,826) (12<sup>th</sup>)
  - Housing and Homeownership
    - Affordability of Homes (17<sup>th</sup>)
  - Education
    - Average College Graduate Debt (\$24,517) (14<sup>th</sup>)

# LOCAL & STATE ASSETS - INCENTIVES

- **The County and State offer competitive incentives for new businesses**
  - State of Georgia
    - Range of tax credits and tax exemptions
    - Foreign Trade Zone (FTZ)
    - One-stop environmental permitting
    - Workforce development services
    - Small business/ entrepreneurship assistance
  - DeKalb County
    - Enterprise Zones
    - Opportunity Zones
    - Range of tax credits and exemptions
  - Decide DeKalb
    - Water and sewer fee reductions (matching fund)
    - Permitting/licensing fee reductions
    - Development review process acceleration
    - Sustainable building certification investment credit

# NOTABLE COMPETITIVE CONSTRAINTS

- **However, Georgia received an overall grade at or below that of competitive on factors related to certain metrics**
  - Financial Assets & Income
    - Consumers with Subprime Credit (49th)
    - Bankruptcy Rate (5.7/1,000 persons) (50th)
  - Businesses & Jobs
    - Underemployment Rate (13.6%) (43rd)
    - Unemployment Rate (7.6%) (44th)
    - Small Business Ownership Rate (49<sup>th</sup>)
    - Business Value by Race (48th)
  - Housing and Homeownership
    - Housing Cost Burden – Renters (52.7%) (43rd)
  - Healthcare
    - Uninsured Low-Income Children (46th)
    - Uninsured Rate (21.1%) (47th)
  - Education
    - High School Graduation Rate (71.7%) (46th)

## Top Site Selection and Quality of Life Criteria

### Area Development Magazine

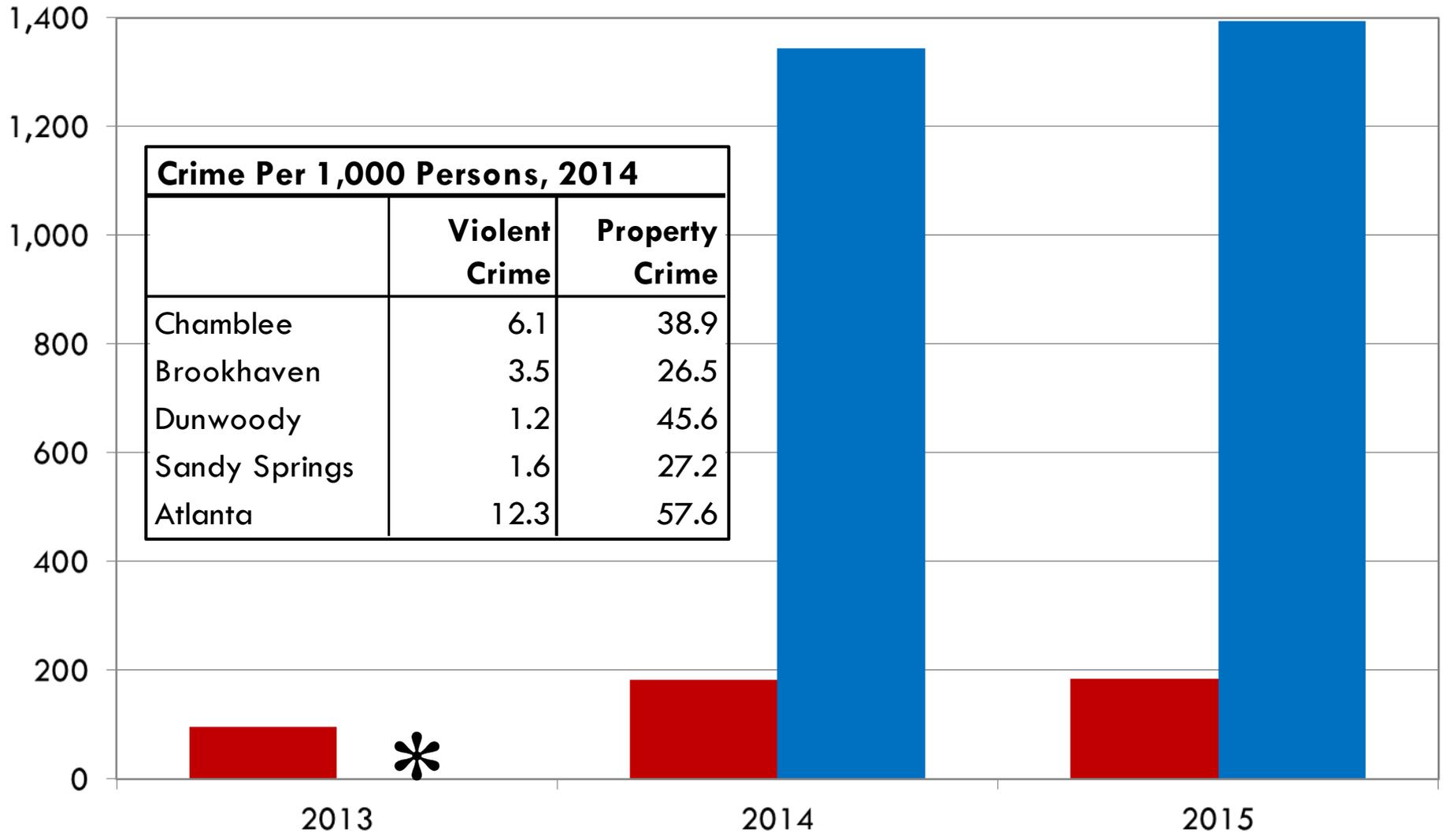
Rank	Criterion	2015	2014	2013	2012	2011
1	Availability of Skilled Labor	92.9	82.1 (5)	95.1	89.4	88.4
2	Highway Accessibility	88.0	88.3 (1)*	93.5	90.1	93.8
3	Quality of Life**	87.6	N/A	N/A	N/A	N/A
4	Occupancy or Construction Costs	85.4	87.9 (2)	87.4	82.8	85.9
5	Availability of Buildings	83.7	82.2 (4)	83.3	78.4	76.3
6	Labor Costs	80.8	81.6 (6)	90.8	90.8	88.4
7	Corporate Tax Rate	78.8	75.6 (10)	82.4	79.3	86.0
8	Proximity to Major Markets	76.3	77.1 (8)	75.6	72.2	83.0
9	State and Local Incentives	75.8	73.2 (11)	81.9	71.1	85.9
10	Energy Availability and Costs	75.3	76.8 (9)	80.8	81.3	84.8
11	Tax Exemptions	74.7	73.2 (11)	80.6	75.4	83.6
12	Expedited or "Fast-Tracked" Permitting	74.2	71.0 (13)	76.3	67.2	72.4
13	Availability of Land	73.9	85.7 (3)	80.3	59.0	73.9
14	Environmental Regulations	69.8	68.6 (16)	71.7	71.1	76.4
15	Training Programs/ Technical Colleges	68.7	62.8 (18)	51.5	54.7	50.6

\* (2014 ranking)

\*\* Quality of Life scoring changed in 2015 to a composite score.

# CRIME TRENDS, 2013 - 2016

Chamblee, Georgia



	<b>Violent Crime</b>	<b>Property Crime</b>
Chamblee	6.1	38.9
Brookhaven	3.5	26.5
Dunwoody	1.2	45.6
Sandy Springs	1.6	27.2
Atlanta	12.3	57.6

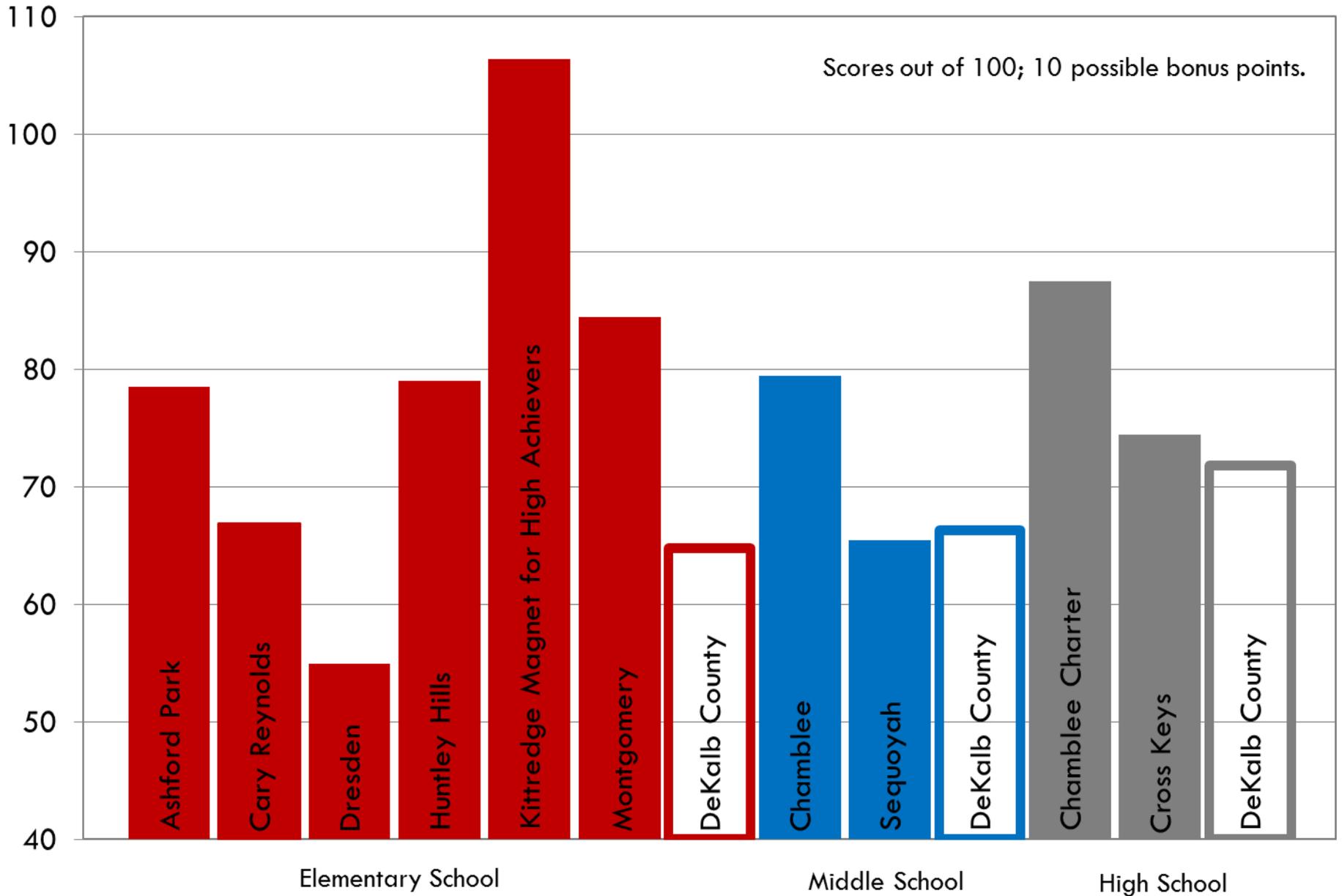
■ Violent Crime

■ Property Crime

\* Data unavailable.

# COLLEGE & CAREER READY PERFORMANCE INDEX (CCRPI), 2015

Chamblee Public Schools (DeKalb County School District)

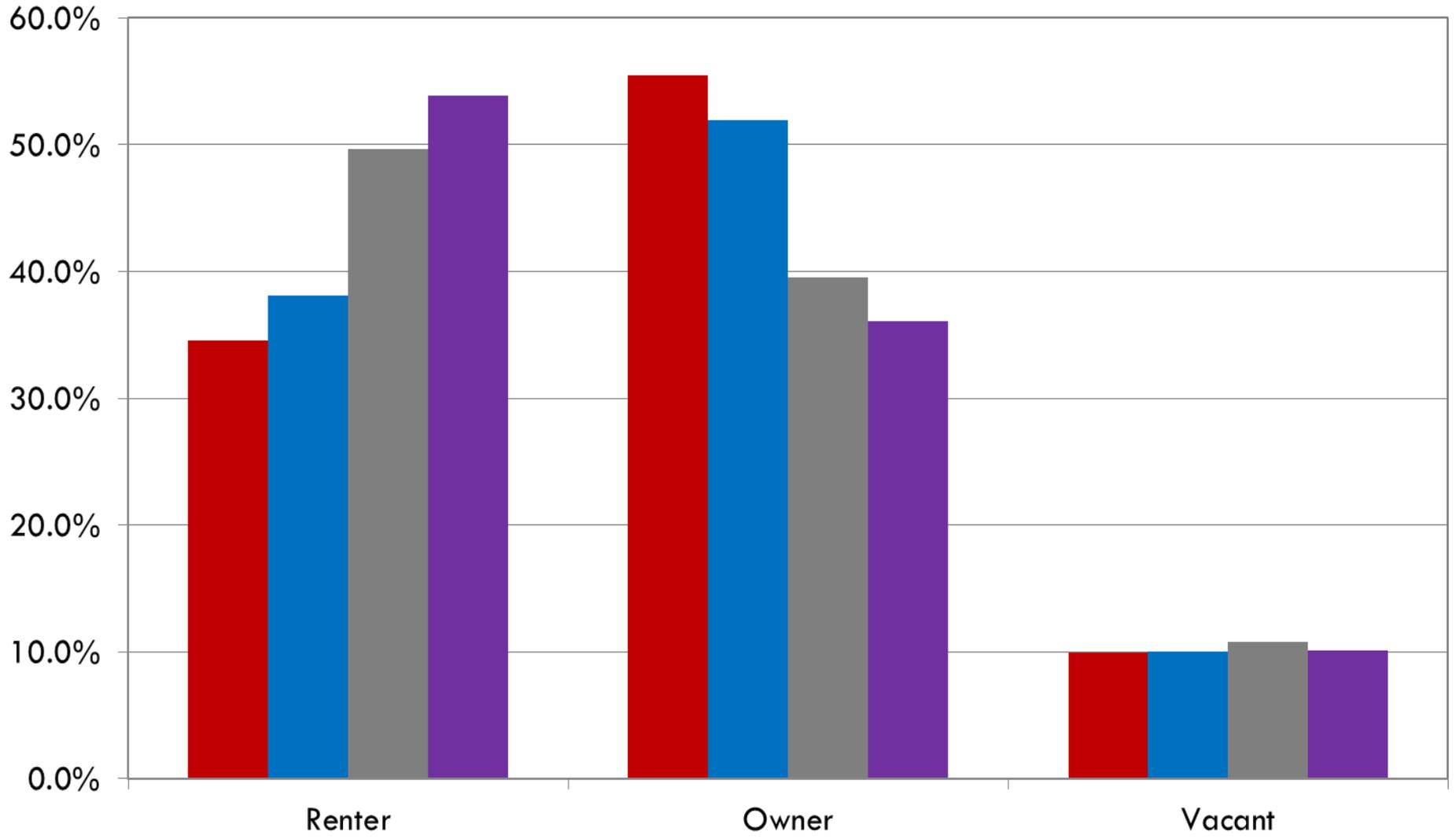


Five hospitals  
within 10 miles.



# HOUSING UNIT COMPOSITION, 2015 ESTIMATES

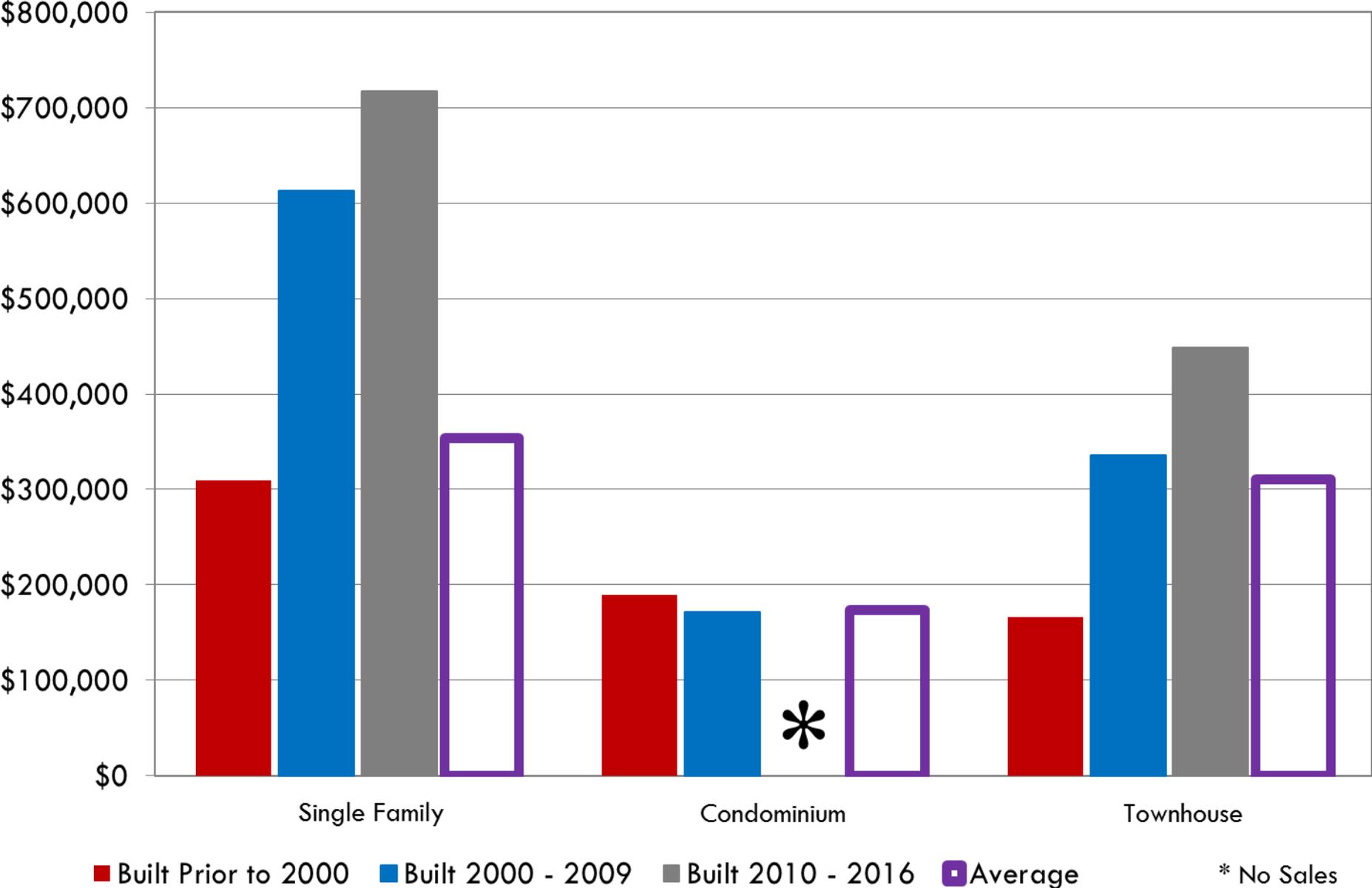
Chamblee and Surrounding Area



■ Chamblee Block Groups ■ 15 Minute Drive Time ■ 3-County Area ■ Metro Atlanta (10 - County)

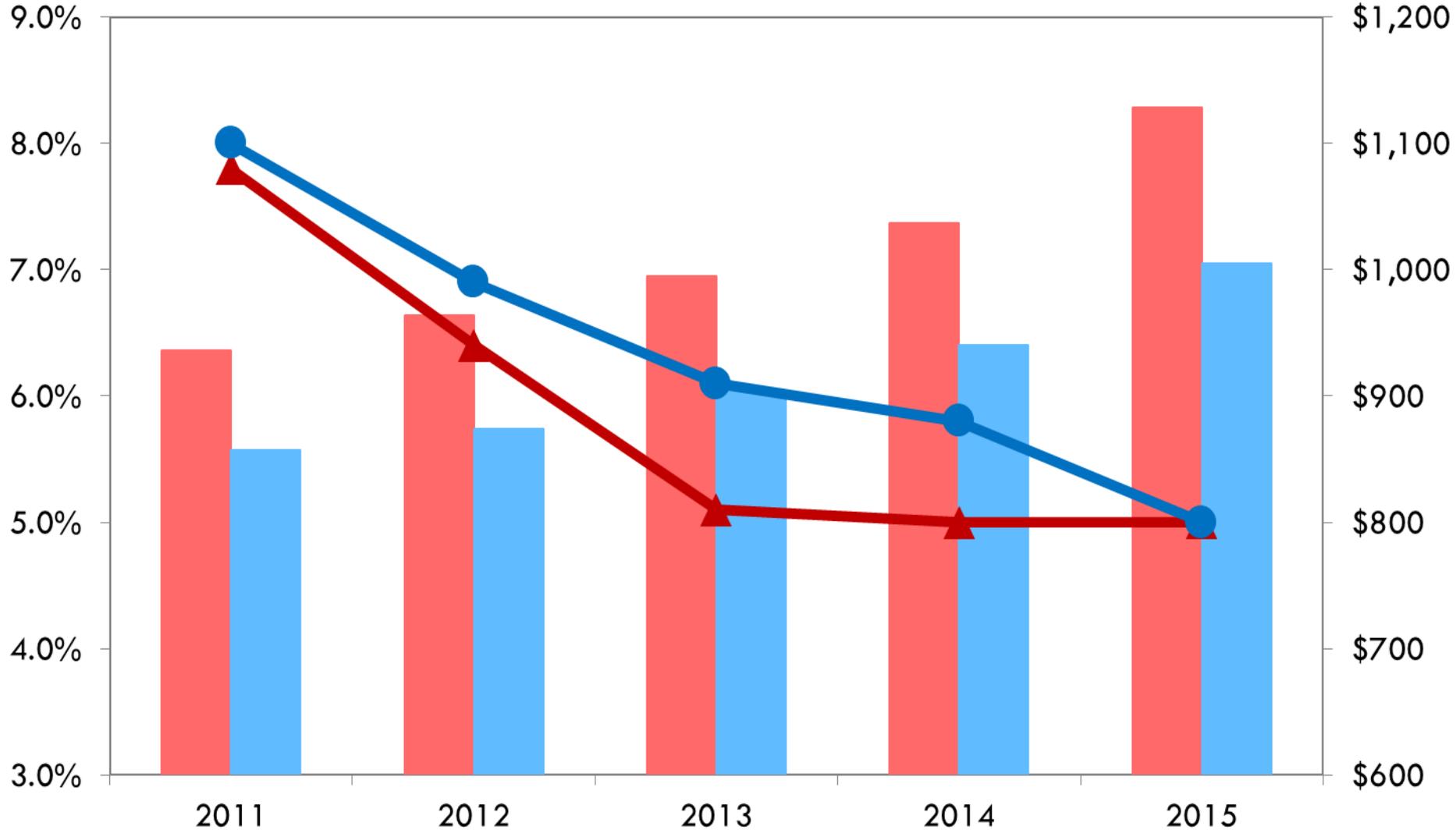
# RECENT RESIDENTIAL SALES, July 2015 - July 2016

Chamblee, Georgia



# AVAILABILITY AND COST OF MULTIFAMILY HOUSING, 2011 - 2015

North DeKalb Submarket and Atlanta Metro Area Market



North DeKalb - Asking Rent  
North DeKalb - Vacancy Rate

Atlanta Metro Area - Asking Rent  
Atlanta Metro Area - Vacancy Rate

# IMPLICATIONS

- **Chamblee's 'industrial heritage' overshadows current socioeconomic and market conditions – perception issue**
- **Chamblee is ideal 'tweener' community that offers urban/city amenities/access with many of the benefits for suburban living**
- **Physical and economic market in Chamblee conducive to the small business (under 100 jobs)**
- **Residential development is an asset to economic development; however diversity in supply and price point will enhance benefit for long-term sustainability**

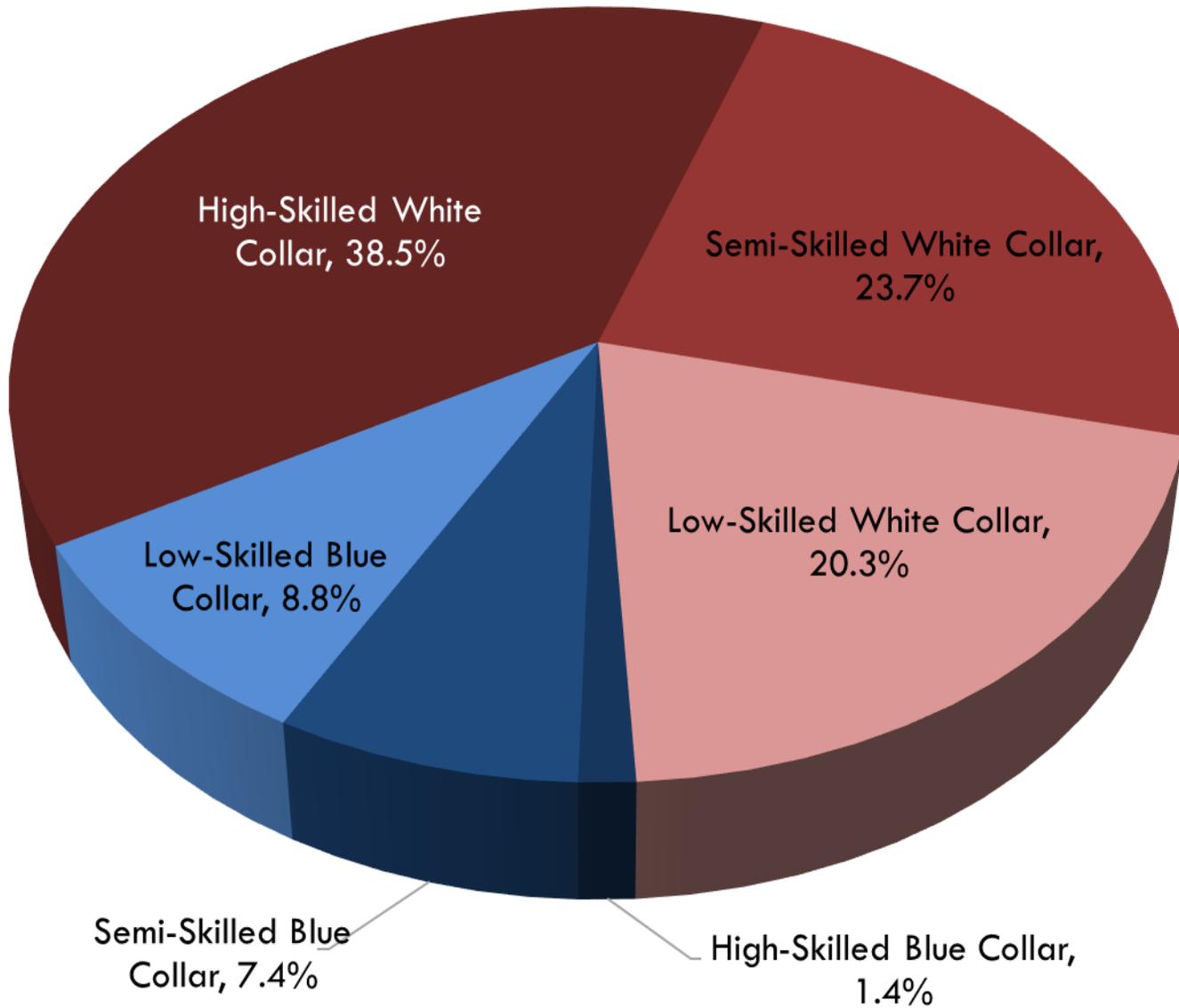
# IMPLICATIONS

- **New County incentives package indicates a commitment to targeted business recruitment and expansion, however there may be a scaling issue**
- **Target industry identification as much a regional assessment as a local assessment**
  - Scaled lists based on City's ability to absorb
  - Partnerships and information sharing with other economic development entities

# WORKFORCE ANALYSIS RECAP

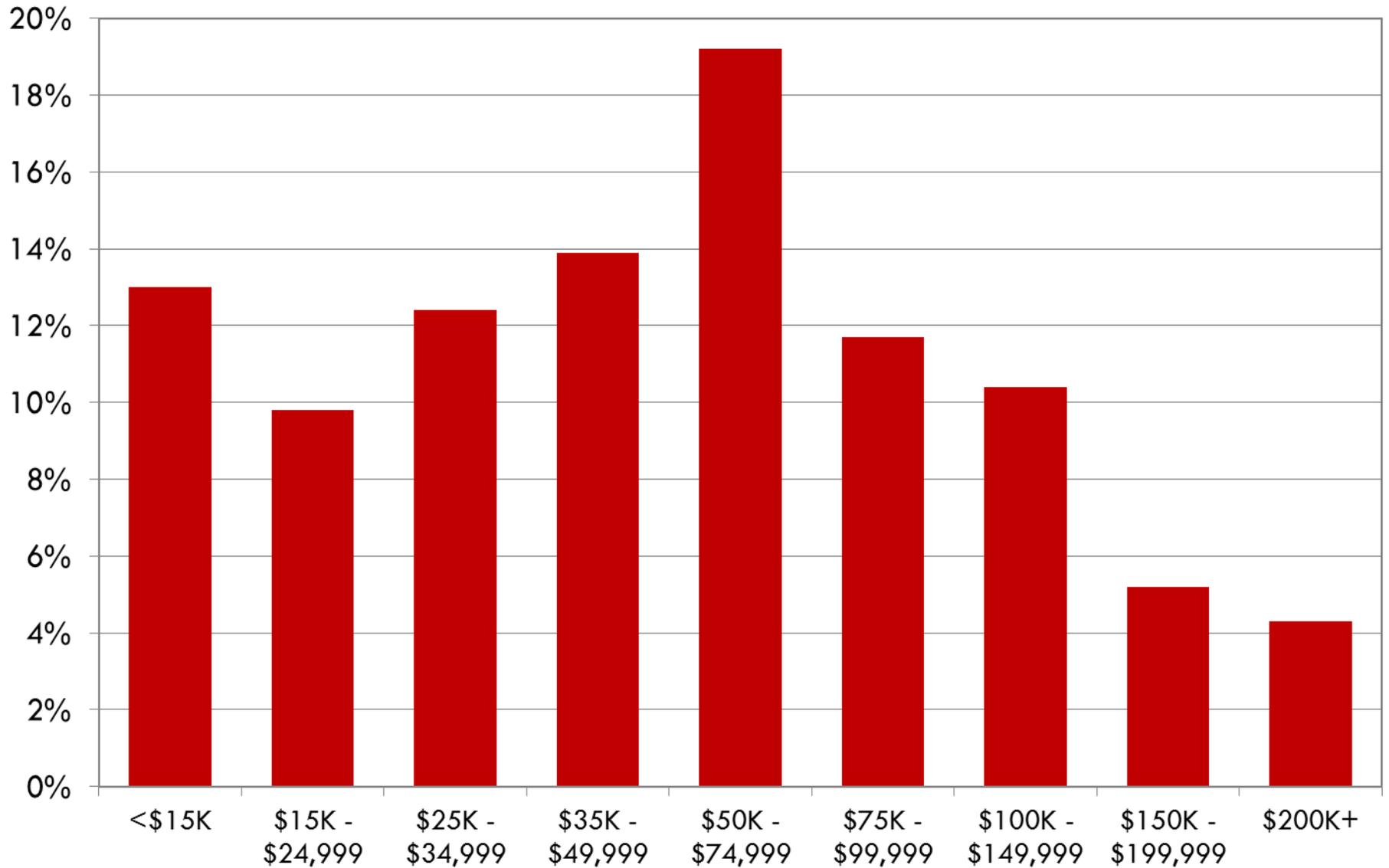
# OCCUPATIONAL SKILL LEVEL

Workforce Investment Area 5, Dekalb County, Georgia, 2013



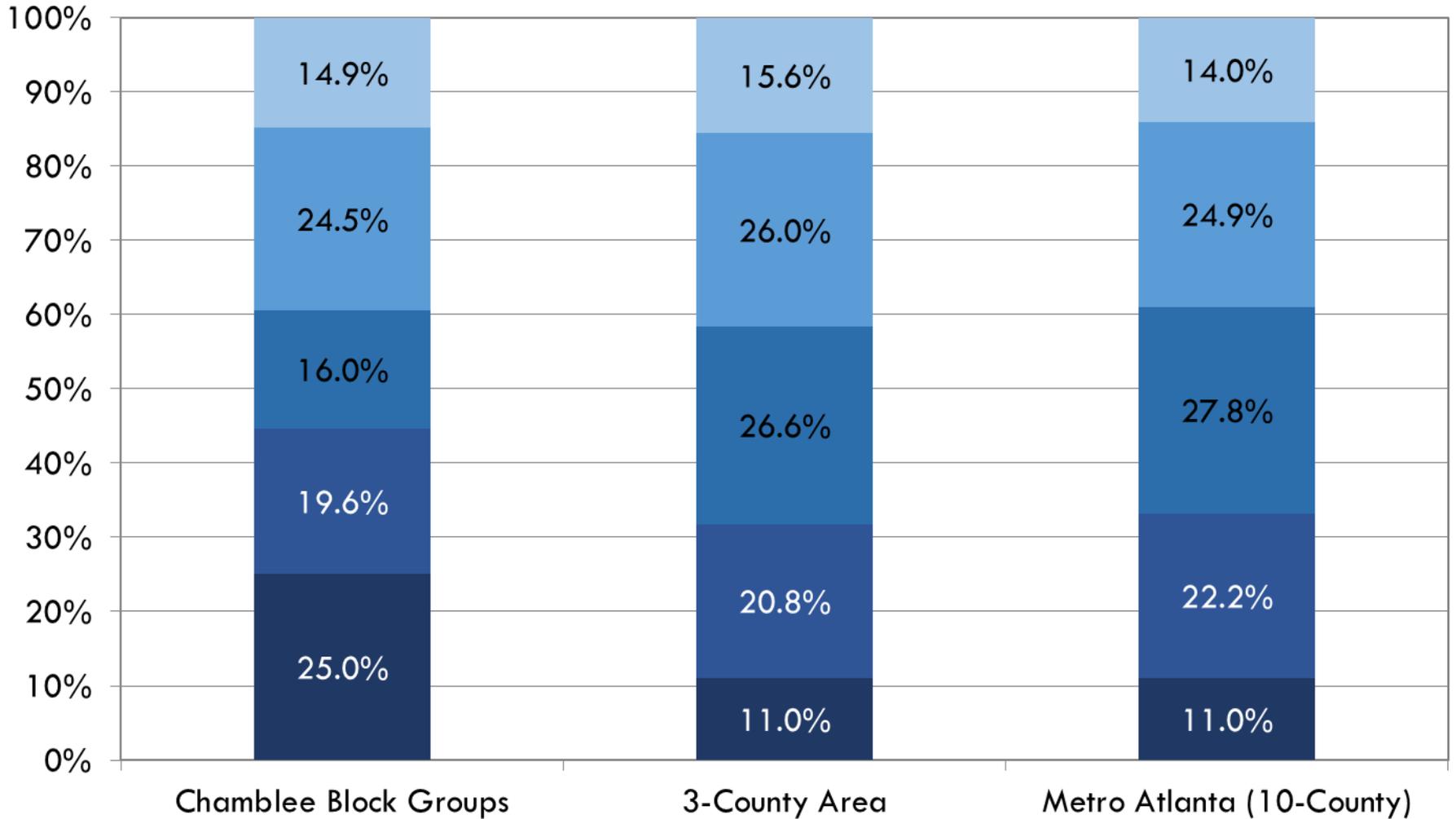
# HOUSEHOLD INCOME DISTRIBUTION

Chamblee Block Groups, Georgia, 2015



# EDUCATION ATTAINMENT

Chamblee Market Areas, 2014 ACS 5-Year Estimates



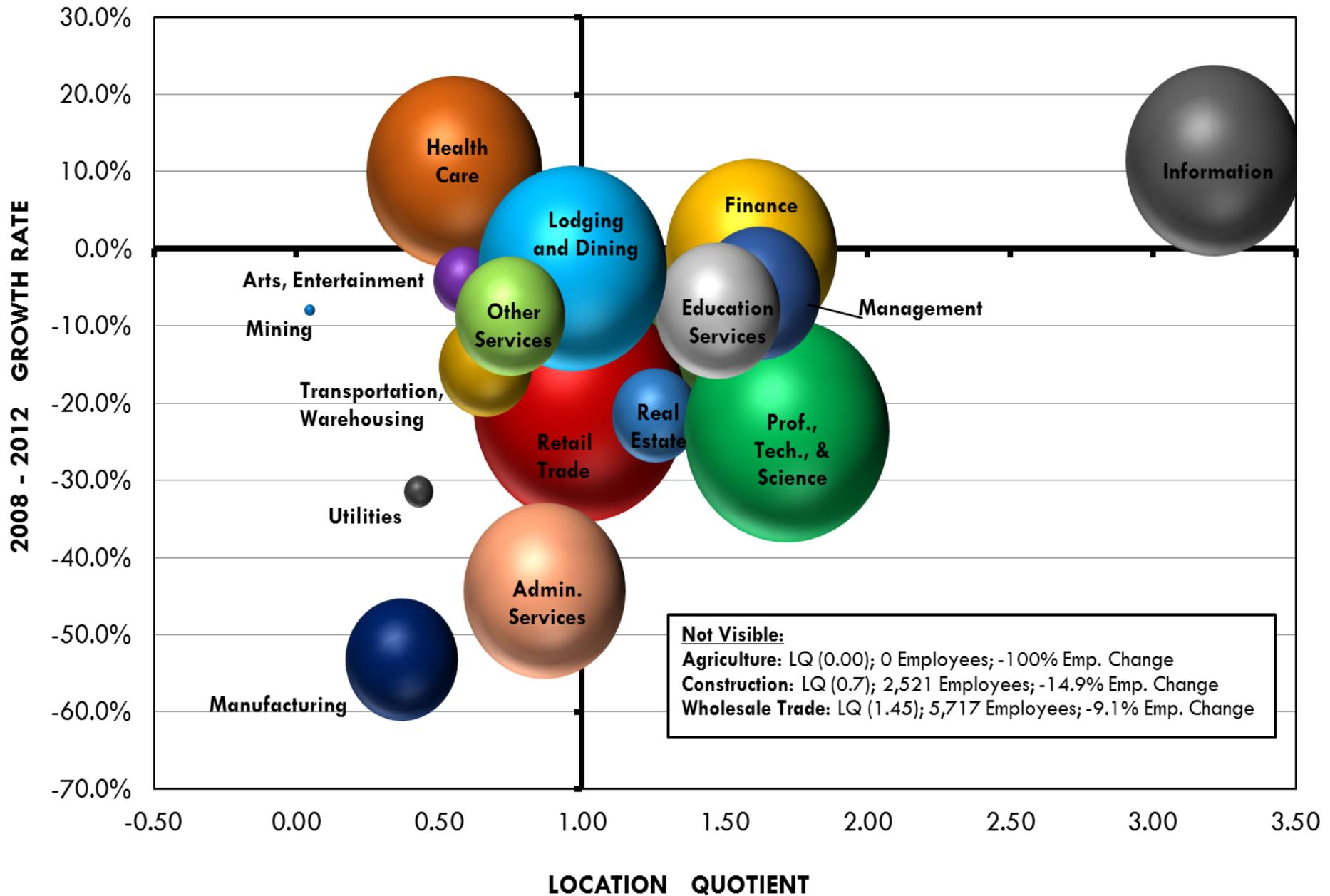
■ Less than High School Degree, No School  
■ Some College, Associate's Degree  
■ Graduate/Professional Degree

■ High School Degree or Equivalent  
■ Bachelor's Degree

# TARGET INDUSTRY ANALYSIS

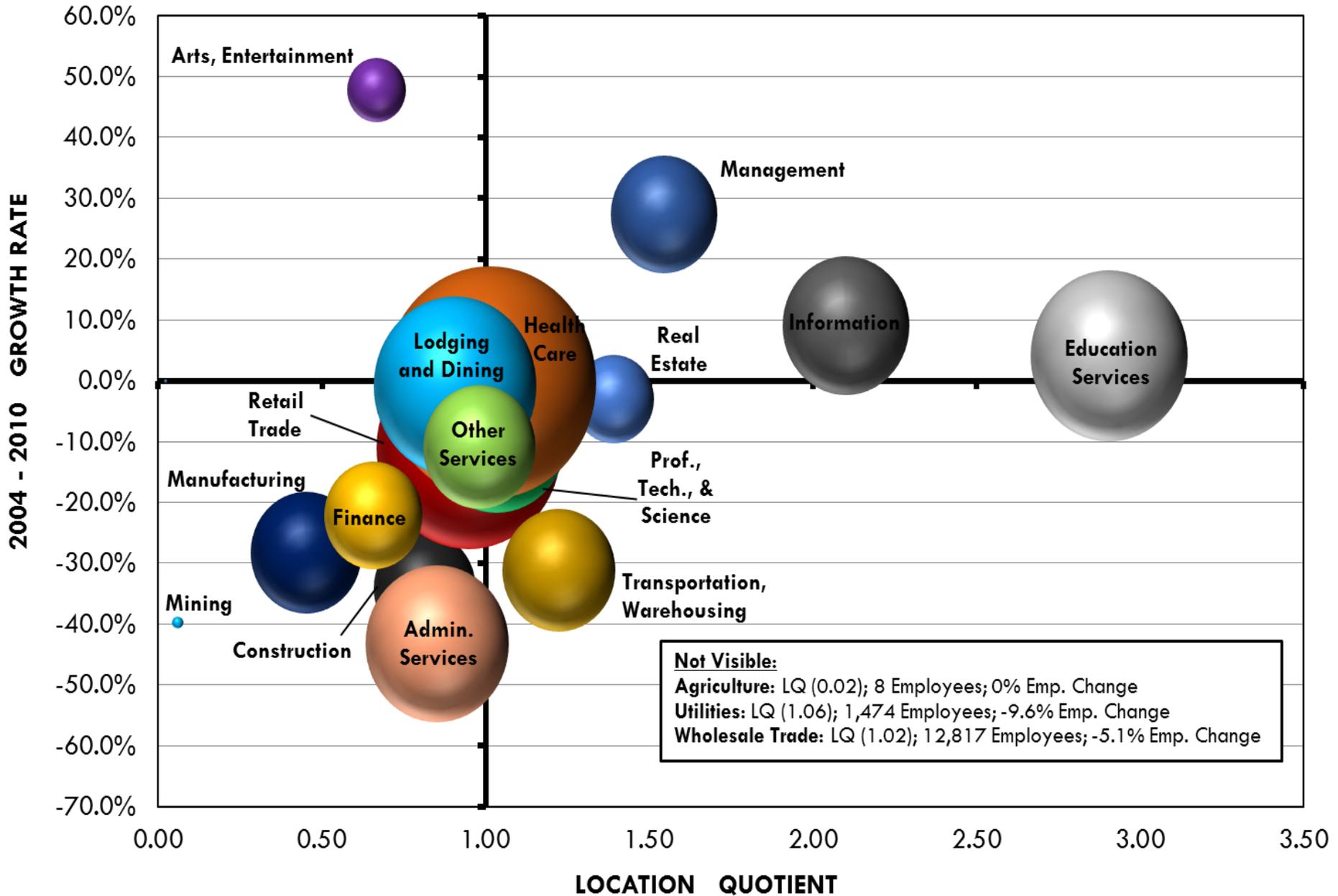
# INDUSTRY STRENGTH

## Chamblee Super District 2012 Employment



# INDUSTRY STRENGTH

## DeKalb County 2012 Employment



# METHODOLOGY

## ■ **Factors Considered in the Cluster Analysis**

- Industries with strong local presence
  - Regional industry cluster analysis
- Industries with growth potential
  - Local success
  - Positive regional trends
- Identification as a Target Industry by DeKalb County and Georgia
- Industries that capitalize on Chamblee's strengths
  - Building Availability/Redevelopment Potential
  - Connectivity
  - Workforce fit
  - Existence of other similar or supporting firms

# TARGET INDUSTRY CLUSTERS

- **Technical, Research, Consulting and Corporate Operations**
  - Professional Services (Very Strong)
    - Computer Systems Design & Related Services
    - Management, Scientific and Technical Consulting Services
    - Accounting, Tax preparation, Bookkeeping and Payroll Services
    - Architectural, Engineering and Related Services
  - Information Services
    - Internet Services Providers, Web Search Portals and Data Processing Services (Very Strong)
    - Other Information Services (Strong)
    - Motion Picture and Sound Recording Industries (Strong)
    - Telecommunications (Moderate)

# TARGET INDUSTRY CLUSTERS

- Market-Based Relationships
  - Management of Companies and Enterprises (Very Strong)
- Support Industries
  - Administrative and Support Services (Strong)
    - Facilities Support Services
    - Office Administrative Services
    - Employment Services
    - Services to Buildings and Dwellings
    - Business Support Services
    - Investigation and Security Services
  - Real Estate (Strong)
    - Activities Related to Real Estate
    - Lessors of Real Estate
    - Offices of Real Estate Agents and Brokers

# PRELIMINARY NEXT STEPS

## ■ **Primary Action**

- Marketing and outreach campaign to raise awareness of Chamblee
- Publish real-time, dynamic listing of available space in City

## ■ **Secondary Action**

- Consider Downtown strategy to bolster office space instead of retail space along side streets as part of mixed-use buildings

## ■ **Long-Term Action**

- Encourage infill/redevelopment in strategic locations focused on office development
  - Along I-285 Perimeter Gateway
  - Peachtree Boulevard near Downtown
  - Century Center infill

# TARGET INDUSTRY CLUSTERS

## ■ **Local and Regional Distribution**

### ■ Warehousing and Storage (Strong)

### ■ Logistics

- Truck Transportation (Very Strong)
- Air Transportation (Moderate)
- Transit and Ground Passenger Transportation (Moderate)
- Support Activities for Transportation (Strong)

### ■ Merchant Wholesalers

- Nondurable Goods Wholesalers (Very Strong)
- Durable Goods Wholesalers (Strong)

### ■ Information Services

- Internet Services Providers, Web Search Portals and Data Processing Services (Very Strong)
- Other Information Services (Strong)
- Telecommunications (Moderate)

# PRELIMINARY NEXT STEPS

## ■ **Primary Action**

- Capitalize on existing assets to attract logistics-based businesses
  - Chamblee is ideally located at major transportation junctions
  - Strengthen/expand relationship with PDK
- Expand active marketing and outreach efforts

## ■ **Secondary Action**

- Encourage consolidation/reinvestment in strategic areas bordering PDK
  - Chamblee Tucker Road
  - Airport/Clairmont Road
  - Buford Highway

## ■ **Long-Term Action**

- Expand warehouse/flex/office space through strategic reinvestment
  - New Peachtree Road
  - Northern Peachtree Boulevard

# TARGET INDUSTRY CLUSTERS

## ■ **Production**

### ■ Construction

- Specialty Trade Contractors (Strong)
  - Foundation, Structure, Building Exterior Contractors
  - Building Equipment Contractors
  - Building Finishing Contractors

### ■ Manufacturing

- Transportation Equipment Manufacturing (Strong)
  - Aerospace Equipment

# PRELIMINARY NEXT STEPS

## ■ **Primary Action**

- Proactively market existing industrial/warehouse building vacancies within the production industries

## ■ **Secondary Action**

- Build partnerships with local (County) and regional entities to connect businesses and developers with incentives

## ■ **Long-Term Action**

- Encourage development/redevelopment to accommodate production based-operations
  - I-85 Frontage Road
  - Chamblee Tucker Road
  - Perimeter Park Extension (Peachtree Boulevard)

# TARGET INDUSTRY CLUSTERS

## ■ **Healthcare, Non-Profit and Institutional**

### ■ Education Services (Moderate)

- Schools
- Training Programs
- Educational Support Services

### ■ Health Care & Social Assistance

- Nursing and Residential Care Facilities (Strong)
- Ambulatory Health Care Services (Moderate)
  - Dentists
  - Medical Offices

### ■ Service Organizations

- Religious, Grantmaking, Civic , Professional and Similar Organizations (Moderate)

# PRELIMINARY NEXT STEPS

## ■ **Primary Action**

- Target service organizations seeking affordable office space.
- Market current available space

## ■ **Secondary Action**

- Expand relationships with ICT, regional education providers, and other institutional entities to expand/attract end users in Chamblee

## ■ **Long-Term Action**

- Include space targeted towards these businesses in redevelopment and infill development projects:
  - I-285 Perimeter Gateway (healthcare)
  - Century Center
  - Chamblee Tucker Road/MARTA Station (education)
  - Downtown expansion

# TARGET INDUSTRY CLUSTERS

## ■ Entertainment and Recreation

### ■ Dining Facilities

- Food Service and Drinking Places (Strong)
- Catering
- Special Food Services
- Restaurants

### ■ Downtown Amenities

- Amusement and Recreation Industries (Moderate)
  - Movie Theater
  - Bowling
  - VR Gaming

# PRELIMINARY NEXT STEPS

## ■ **Primary Action**

- Complete the Downtown master plan to incorporate live-work-play component
- Actively market international dining opportunities in Chamblee
- Encourage venues that combine personal entertainment with dining/evening activities (i.e. Dave and Buster's)

## ■ **Long-Term Action**

- Integrate cluster entertainment into redevelopment and infill development projects with a mix of uses:
  - I-285 Perimeter Gateway
  - Peachtree Boulevard
  - Century Center
  - Buford Highway

# ENTREPRENEURS

- **Notable growth (10.6%) in sole proprietorships in DeKalb County between 2010 and 2014**
- **Sole proprietor (non-employer) concentrations in target industry clusters for DeKalb County:**
  - Personal and Laundry Services (11,485)
  - Professional Scientific and Technical Services (11,473)
  - Administrative and Support Services (7,542)
  - Real Estate (5,311)
  - Ambulatory Health Care Services (4,302)
- **Opportunity for focused entrepreneurial development within Chamblee**
  - Identify interest generated by informal, home-based businesses
  - Outreach to Hispanic/Asian population to expand and formalize



# HOUSING COST & AVAILABILITY

- **Less than 4% of the ownership units in Chamblee have sold within the last year**
  - There is more demand than supply
- **Selling price is equal to asking price for ownership units, reflecting healthy demand in the market**
- **Prices have increased notably since the Recession because of Chamblee's relatively affordability, quality schools, access to MARTA and proximity to downtown Atlanta.**
- **The cost for rental units has increased as the availability has decreased**