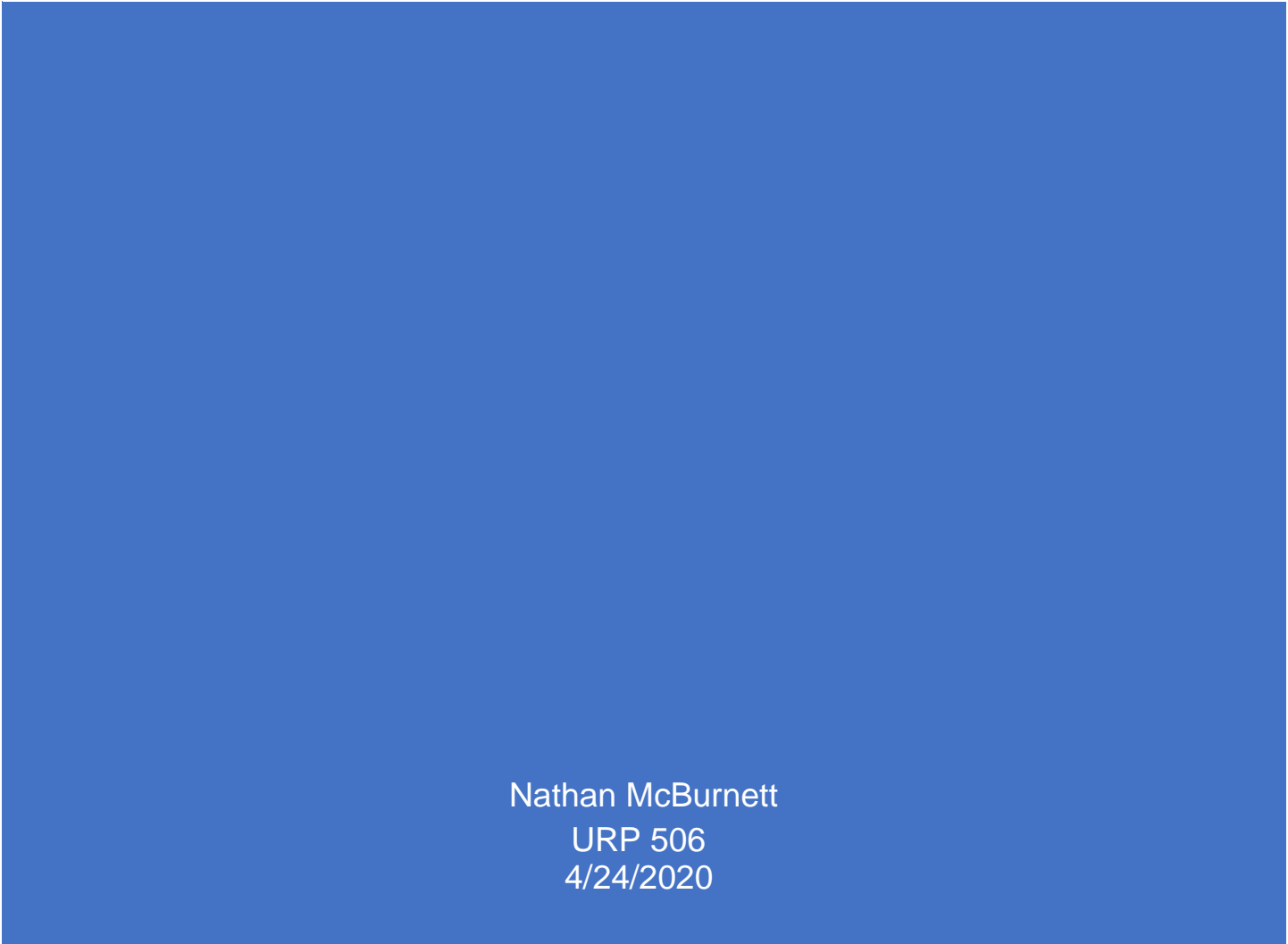




A PLACE REPORT OF FULTON COUNTY, GEORGIA



Nathan McBurnett
URP 506
4/24/2020

Executive Summary

As Georgia's most populous county, Fulton County is an important cultural and economic epicenter regionally and statewide. With Atlanta at its center, the geographic distribution of Fulton County's population and economic assets provides a compelling context for a place-based analysis. This report provides the findings of a comprehensive study of Fulton County's demographic, economic, and housing profiles. Included within these profiles are detailed analyses of the current trends and future projections of the county's demographic characteristics, housing demand, and main economic sectors.

For Fulton County's population profile, the study found that current residents are much more racially diverse than the national average. However, this diverse population is also highly segregated in terms of both race and median household income, with the City of Atlanta serving as the border between distinctly different northern and south-central regions.¹ Compared to national averages, Fulton County is also notably younger and more educated, with a steady increase in percentage of college-educated residents between 2014-2018.

The County's housing profile shows a current shortage of units affordable to residents making \$15k or less, with a significant increase in demand projected for this income level. The projected housing demand shows a distinct shift in housing preference, with a notable increase in percentage of residents desiring small-lot single family homes and townhomes. These projected housing preferences suggest a desire for residential densification, which the County's municipal planning agencies should acknowledge in their future planning efforts.

The County's economic profile indicates that there are seven sub-industries within its economic base, four of which are included within the top ten sectors with the highest demand for office space nationwide.² The creative, professional, and managerial industries have experienced the highest growth between 2010-2016. The manufacturing industry has experienced the largest decline, reporting numbers consistent with metropolitan regions elsewhere in the United States.

¹ See Appendix A for maps illustrating geographic distributions for White and Black populations.

² CBRE Group, Inc. "Office/Occupier: 2020 U.S. Real Estate Market Outlook." Accessed 24 April 2020. <https://www.cbre.us/research-and-reports/2020-US-Real-Estate-Market-Outlook-Office-Occupier>.

Table of Contents

Introduction and Overview.....	3
Population Profile.....	4
Survey Design.....	6
Housing Analysis and Projection.....	7
Economic Profile.....	10
Synthesis.....	12
Appendix.....	13

Introduction and Overview

Located in northwestern Georgia, Fulton County is the largest county in the state and one of the largest distribution centers for goods and services in the southeastern United States.³ As home to the heart of the Atlanta metropolitan region, Fulton County contains a number of the state's largest and most affluent cities. Once an agricultural region known as the "Golden Corridor," northern Fulton County has now become the county's largest concentration of wealth outside of the City of Atlanta.⁴ This concentration of wealth stands in stark contrast to the southern region,⁵ which is much less populated and more racially and ethnically diverse.

Experiencing rapid growth after the US Civil War, Fulton County became the center for transportation and business during the City of Atlanta's reconstruction. This rapid growth was delayed in the early 20th century due to the Great Depression, leading to the incorporation of the adjacent Milton and Campbell counties as an austerity measure.⁶ As a result, the county's current elongated shape contains significant variations in economic and demographic characteristics.

The analyses presented within this report frame Fulton County's unique demographic and economic characteristics in terms of current trends and future projections. Due to complications resulting from the 2020 COVID-19 pandemic, the data analyzed within this report was collected virtually and is thus exclusively quantitative.

³ Carpenter, Cathy. "Fulton County." *New Georgia Encyclopedia*. 17 September 2019. Web. Accessed 14 April 2020. <https://www.georgiaencyclopedia.org/articles/counties-cities-neighborhoods/fulton-county>.

⁴ Carpenter, 2019.

⁵ See Appendix for map of median household income by census tract in Fulton County.

⁶ "Fulton County, Georgia." *Wikipedia*. Last edited 12 April 2020. Web. Accessed 14 April 2020. https://en.wikipedia.org/wiki/Fulton_County,_Georgia.

Population Profile

Table I: Basic Demographic Characteristics

Characteristics	Fulton County, GA		Georgia	U.S.
	Estimate	Percent	Percent	Percent
Total Population	1,050,114	-	-	-
Male	508,879 +/-260	48.5 +/-0.1	48.7 +/-0.1	49.2 +/-0.1
Female	541,235 +/-260	51.5 +/-0.1	51.3 +/-0.1	50.8 +/-0.1
Median Age	35.6 +/-0.2	-	-	-
Age 65-74 years	72,837 +/-918	6.9 +/-0.1	8.5 +/-0.1	9.3 +/-0.1
Race				
<i>One Race</i>	1,026,888 +/-3,762	97.8 +/-0.4	97.3 +/-0.1	96.6 +/-0.1
White	467,999 +/-5,654	44.6 +/-0.5	58.3 +/-0.2	72.2 +/-0.1
Black or African American	457,063 +/-4,080	43.5 +/-0.4	31.6 +/-0.1	12.7 +/-0.1
Native American and Alaska Native	2,647 +/-782	0.3 +/-0.1	0.3 +/-0.1	0.9 +/-0.1
Asian	78,713 +/-1,688	7.5 +/-0.2	4.1 +/-0.1	5.6 +/-0.1
Native Hawaiian and other Pacific Islander	478 +/-414	~0.0 +/-0.1	0.1 +/-0.1	0.2 +/-0.1
<i>Two or More Races</i>	23,226 +/-3,762	2.2 +/-0.4	2.7 +/-0.1	3.4 +/-0.1
Hispanic or Latino/a of Any Race	76,334*	7.3*	9.7 +/-0.1	18.3 +/-0.1
Population 18 and older who are citizens	749,771 +/-5,332	7.5 +/-0.0	71.2 +/-0.0	71.4 +/-0.0

*MOE not provided

Data Source: US Census Bureau, 2018

For basic demographics, Fulton County has both a significantly higher “Black or African American” population and a higher “Asian” population than the national percentages for both racial categories. The “Hispanic or Latina/o of any race” category is significantly smaller than the percent nationally. The population of “Age 65-74 years” is also notably smaller than the percent nationally. The Census Bureau states that the percentage of “Population 18 and over who are citizens” in Fulton County is nearly 1/10th of the national and state percentages, which leads me to believe that there must have been an error in reporting for this specific census category.

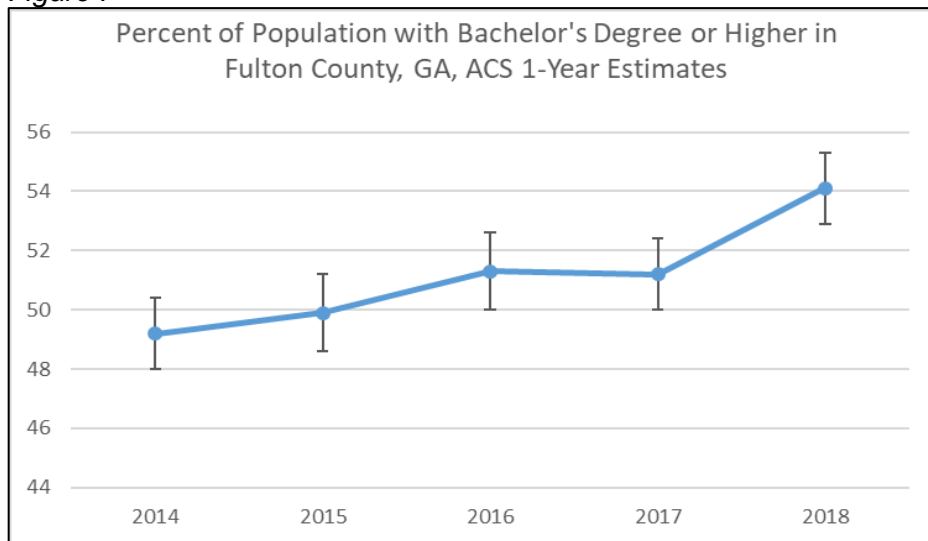
Table II: Detailed Demographic Characteristics

Characteristics	Fulton County, GA		Georgia	U.S.
	Estimate	Percent	Percent	Percent
Bachelor’s Degree or Higher	386,293 +/-8,695	54.1 +/-1.2	31.9 +/-0.3	32.6 +/-0.1
Did not graduate high school	45,793 +/-3,288	6.4 +/-0.67	12.4 +/-0.2	11.7 +/-0.1
Households with Internet Subscription	372,115 +/-5,889	89.2 +/-0.8	83.7 +/-0.4	85.1 +/-0.1
Born in state of residence	465,493 +/-10,366	44.3 +/-1.0	54.8 +/-0.4	58.1 +/-0.1
Language Spoke at Home				
Language other than English	163,134 +/-7,190	16.5 +/-0.7	14.0 +/-0.3	21.9 +/-0.1
Speak English Less Than “Very Well”	52,294 +/-6,124	5.3 +/-0.6	5.4 +/-0.2	8.3 +/-0.1

Data Source: US Census Bureau, 2018

For detailed demographic characteristics, the population with a “Bachelor’s degree or higher” is significantly larger than both the national and state percentages, and the percent of the population that “did not graduate high school” is nearly half both state and national percentages. A significantly smaller portion of Fulton County’s population were “born in state of residence” as well, which be due to the high number of out-of-state university students within the county.

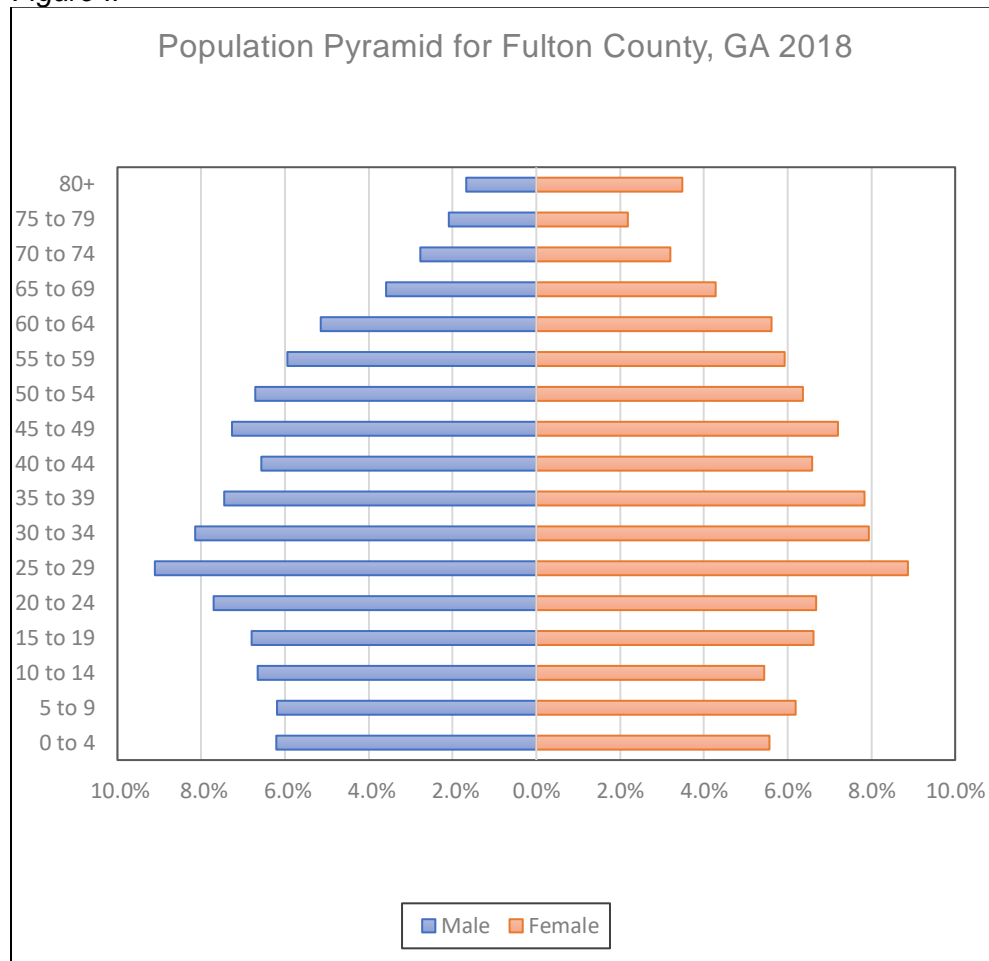
Figure 1



Data Source: US Census Bureau, 2018

Over the 2014-2018 interval, the population of Fulton County, GA, has experienced a moderate increase in percentage of individuals obtaining bachelor’s degrees. Taking the margins of error into account, this graph shows an absolute increase in the total percentage of bachelor’s degree holders between 2014 and 2018, but no absolute increase over the four years leading up to 2018. With Margins of error of 1.2% in both 2017 and 2018, we are able to determine that there was in fact an absolute increase in bachelor’s degree holders in Fulton County between these two years which is a small spike in comparison to the trend over the previous four years.

Figure II



Data Source: US Census Bureau

The generally constrictive shape of this pyramid suggests a “slow growth” population, where the distribution is relatively even on either side of the largest population cohort (ages 25-29). There is a notable disproportion at age cohort 10-14, where males outnumber females by approximately 1%. There is also a notable dip in population for age cohort 40-44. The 80+ age cohort for females is notably high compared to both the male equivalent cohort and the two preceding female age cohorts.

Survey Design

The goal of this survey was to gather a broad range of information regarding in-migration patterns and perceived quality of life in the City of Atlanta. Using a variety of multiple choice, Likert scale, and short answer questions, the survey is designed to elicit specific information from both newer and longer-tenured residents. Because of Atlanta’s recent uptick in population

and economic growth, this survey seeks to collect information regarding the perceived consequences of rapid development within the city. Questions related to growth include perceived neighborhood quality, neighborhood change, the quality of public services, and housing options and preferences. Because of Atlanta's diverse racial composition, questions regarding perceived racial tensions and identity representation have been included. In order to gain any additional qualitative information that residents may be willing to provide, open-ended questions focusing on major issues within the city have also been included. See Appendix for the survey template, including a brief explanation of each question.

In the interest of time, the intended method of distribution for this survey was an internet-based non-probability sample. The survey sample was to be selected using 1) a list of emails provided by a known faculty contact at Georgia Tech University, 2) a list of social media accounts provided by a friend living within the City of Atlanta, and 3) members of the r/Atlanta subreddit community. In order to achieve a 95% confidence level, a sample size of 100 people was sought.⁷

Housing Analysis and Projection

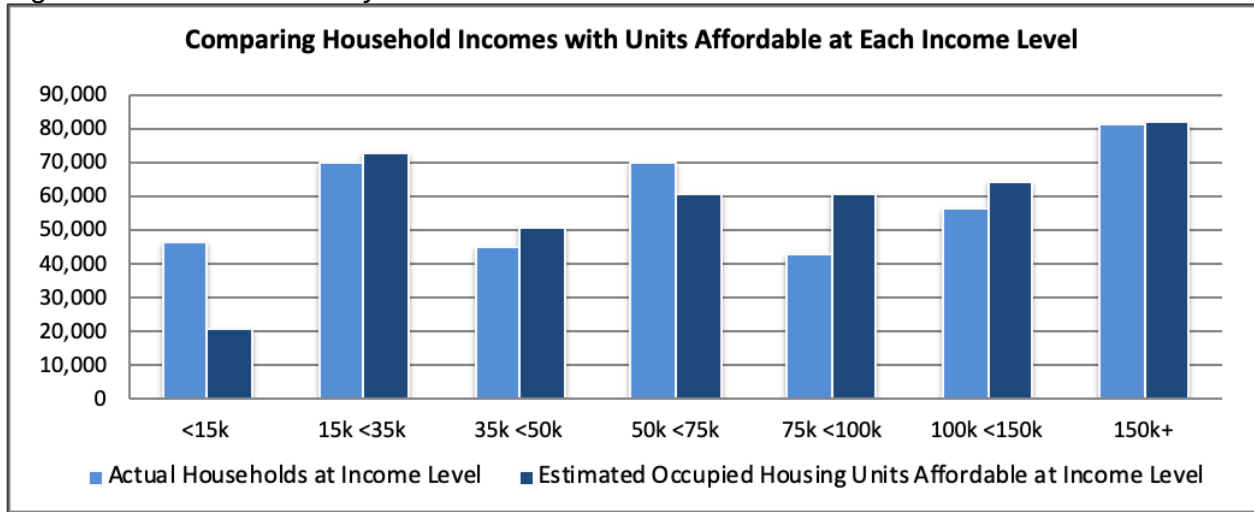
An analysis of current and projected housing dynamics was performed using the Envision Tomorrow Balanced Housing Model. Housing and demographic data was collected from the US Census Bureau's 2017 1-year ACS estimates. This section provides a brief summary of the current and projected demand for housing units at seven different income classes, including a projection of future housing preferences for the entire population. Three policy recommendations are provided based on the key findings from the analysis.

Key Findings:

1. As of 2017, households making \$15k a year or less spent an average of 53% of their income on housing.
2. The projected demand for households making \$15k or less annually are expected to far exceed the supply of affordable housing units by 2040.
3. The overall proportion of households renting is expected to increase by 2% in 2040, with households in age cohorts 45+ experiencing the largest proportional increase.

⁷ Sample size was calculated using Figure 3.5 from: "Covering the Population and Selecting Who to Survey," Dillman, Don A., Jolene D. Smyth, and Leah Melani Christian. 2014. *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method*: John Wiley and Sons, p. 80.

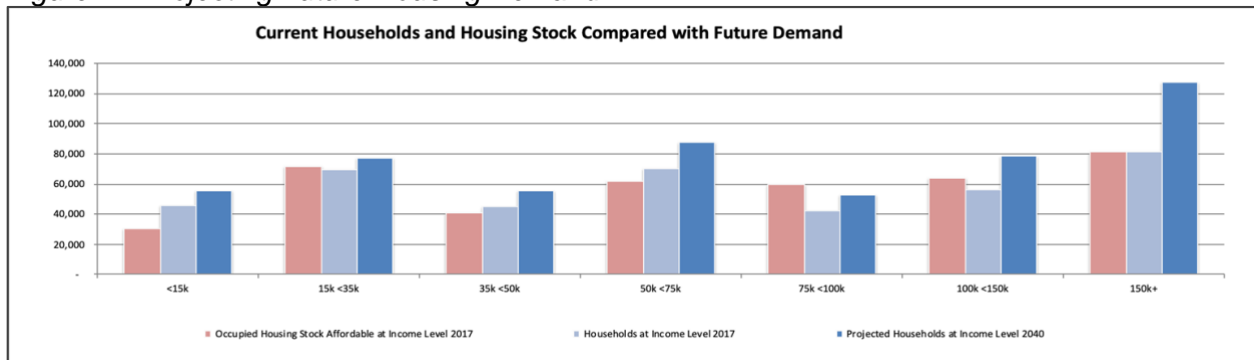
Figure I II: Current Summary



Data Source: UC Census Bureau, 2017

Figure III shows a lack of affordable units available to households with an income of \$15k or less and households with an income between \$50k-75k. For households of all other income levels, there is a general over-supply of units affordable.

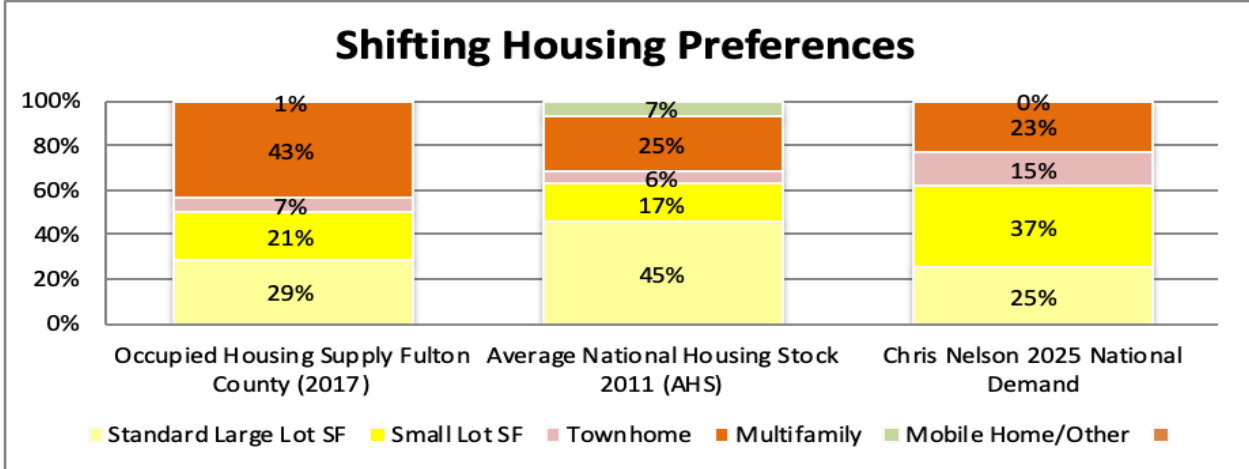
Figure IV: Projecting Future Housing Demand



Data Source: UC Census Bureau, 2017

Figure IV indicates a projected growth in demand exceeding units available to households of all income levels except for those earning between \$75k-100k. Households earning between \$50k-75k and \$150k+ are projected to experience the largest increase in demand between 2017 and 2040.

Figure V: Projecting Future Housing Preferences



Data Source: UC Census Bureau, 2017

Figure V illustrates a projected shift in housing preference toward small lot single family units and townhome units between 2017 and 2025.

Policy Recommendations:

1. With a projected proportional increase in renters, especially for senior citizen residents, Fulton County should pursue housing policies that increase the quantity and quality of senior rental housing
2. Municipal officials in Fulton County need to facilitate the development of over 1,200 units a year between 2017-2040 affordable to households making \$15k or less annually in order to meet the projected demand
3. Municipalities within Fulton County should update their master plans according to the projected shift in housing preferences

Economic Profile

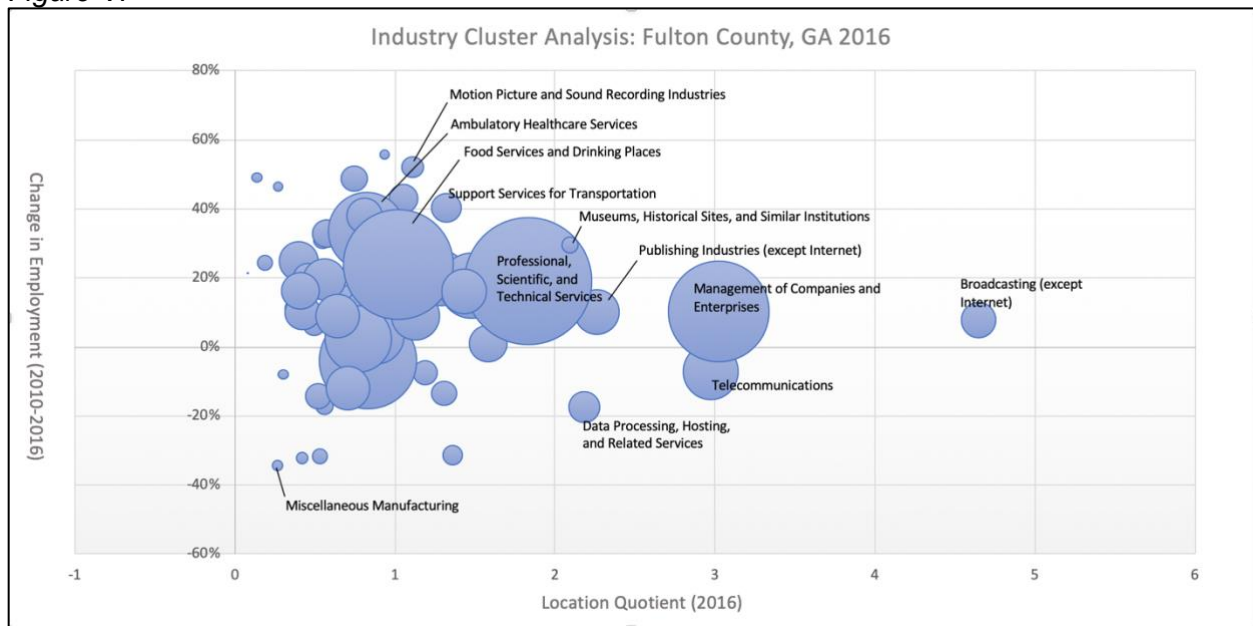
Table III

Employment, Fulton County, GA, 2027								
2017 NAICS Code	Industry Description	# Establishments	Annual Payroll (\$1000)	# Employees	Location Quotient	Non-Basic Employment	Basic Employment	Base Multiplier
0	Total for all sectors	36,792	59,154,230	813,418		617641	195234	4.17
11	Agriculture, forestry, fishing and hunting	16	766	34	0.03	34	0	
21	Mining, quarrying, and oil and gas extraction	7	5	e	-	-	-	
22	Utilities	60	602,542	4,937	1.21	4078	859	
23	Construction	1,301	1,484,455	21,275	0.51	21275	0	
31-33	Manufacturing	601	1,188,785	19,971	0.27	19971	0	
42	Wholesale trade	1,900	2,594,134	32,709	0.85	32709	0	
44-45	Retail trade	3,601	1,600,790	53,952	0.54	53952	0	
48-49	Transportation and warehousing	860	4,420,203	57,613	1.87	30782	26831	
51	Information	1,242	6,725,197	59,961	2.70	22190	37771	
52	Finance and insurance	2,806	7,736,753	64,094	1.58	40535	23559	
53	Real estate and rental and leasing	2,573	2,063,289	25,667	1.89	13587	12080	
54	Professional, scientific, and technical services	7,523	9,969,895	103,125	1.83	56333	46792	
55	Management of companies and enterprises	630	8,224,999	69,245	3.16	21902	47343	
56	Administrative and support and waste management and remediation services	1,978	3,223,938	61,341	0.82	61341	0	
61	Educational services	660	856,233	20,632	0.88	20632	0	
62	Health care and social assistance	3,952	4,918,813	86,514	0.68	86514	0	
71	Arts, entertainment, and recreation	742	529,928	13,399	0.89	13399	0	
72	Accommodation and food services	3,404	1,872,569	89,011	1.00	89011	0	
81	Other services (except public administration)	2,893	1,123,332	29,395	0.84	29395	0	

Data Source: US Census Bureau, 2017

According to the economic base analysis, the following 2-digit NAICS codes represent Fulton County's seven base sub-industries: 22, 48-49, 51, 52, 53, 54, 55. Two industries have over half of their total employees considered basic. Fulton County's most specialized base (export) industry is "Management of companies and enterprises," and the most non-basic (import) industry is "Agriculture, forestry, fishing and hunting." The base multiplier is 4.17, which estimates that a loss of 100 basic employees would result in the loss of 317 non-basic employees. This analysis assumes that there is no "crosshauling" within industries, where goods may be imported *and* exported in each sector regardless of the sector's basic/non-basic status.

Figure VI



Data Source: US Census Bureau, 2016

The cluster analysis represents a wide variation in changing sub-industries within Fulton County between 2010-2016. Two notable mature sub-industries include “Professional, Scientific, and Technical Services” and “Food Services and Drinking Places.” The sub-industry “Management of Companies and Enterprises” is one of the most important high-growth mature sub-industries, while “Motion Picture and Sound Recording Industries” is a notable emerging industry. “Miscellaneous Manufacturing” is in a significant state of decline – this is also an apparent trend for the entire manufacturing industry.

This cluster analysis raises a number of questions regarding future research on the economic context of Fulton County. One important question that should be addressed is the degree to which the represented industries are interrelated; especially for the industries employing a similar workforce, there could be a correlation between their respective states of growth and decline. An analysis of employment change could also help shed light on how the economic context is evolving over time – as certain industries decline, which other industries are those former employees moving to? Although an analysis of smaller sub-industries could allow for a more detailed analysis, the data for these industries within Fulton County may not be readily available.

Synthesis

The analyses presented in this report indicate that Fulton County's demographic profile and economic context have changed significantly over the past six years and are projected to continue doing so into the future. Although the lack of survey data limits the level to which this report could provide a comprehensive analysis of both quantitative and qualitative factors, the key findings can still provide useful insight for future planning efforts in the county.

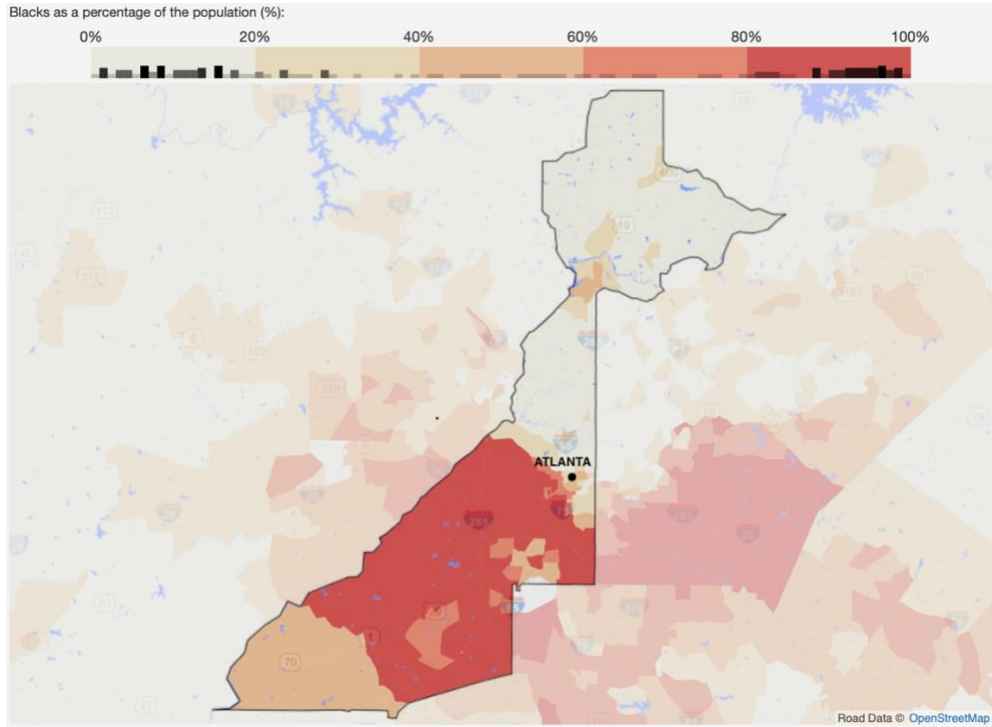
The low fertility rate and high proportion of residents born outside of the state indicate that the majority of Fulton County's population growth is being driven primarily by in-migration. Considering that residents ages 25-29 years old represent the largest population cohort, Fulton County's in-migration rate might be driven by young people either looking for educational opportunities or work opportunities. Both the increasing proportion of residents with a college degree and the increasing rate of employment for industries demanding a college-educated workforce support this possible trend.

The increasing rate of employment for industries demanding a high-skilled, highly educated workforce will undoubtedly have an effect on the county's median household income and housing choices. With rising household incomes and a shift in preference toward denser housing typologies, the county could see an increase in property values within urban areas, creating affordability issues for lower income urban households. The present lack of units affordable to low income households could thus be further intensified by the county's economic growth. Planners within the county should be actively exploring strategies for producing more affordable housing units available in order to avoid increasing the housing cost burden for low income households.

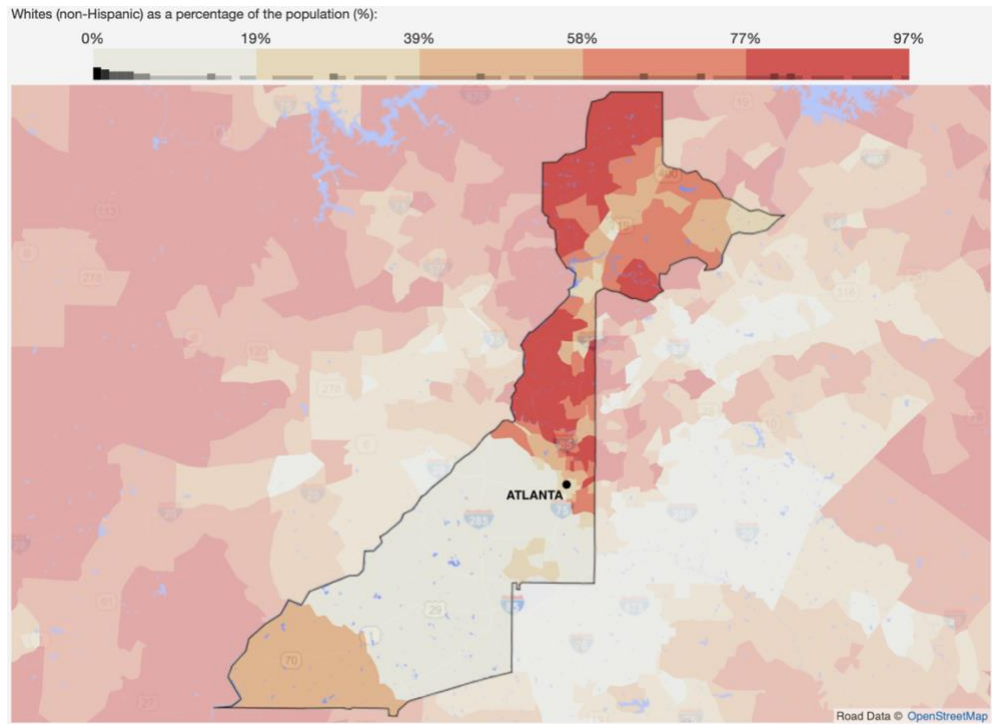
Although the analyses presented within this report do not provide any qualitative information about Fulton County's population, planners and public officials should focus on pursuing policies and planning strategies that cater to all segments of the county's diverse residents. Since about 55% of residents within the county belong to historically marginalized racial or ethnic minorities, public officials will need to actively pursue policies that increase the availability of high-wage jobs and quality housing for these groups as the economy grows. The current socioeconomic and racial segregation between the county's northern and southern portions could become further entrenched if economic growth is allowed to progress unchecked.

Appendix

White and Black Populations by Census Tract in Fulton County, Georgia

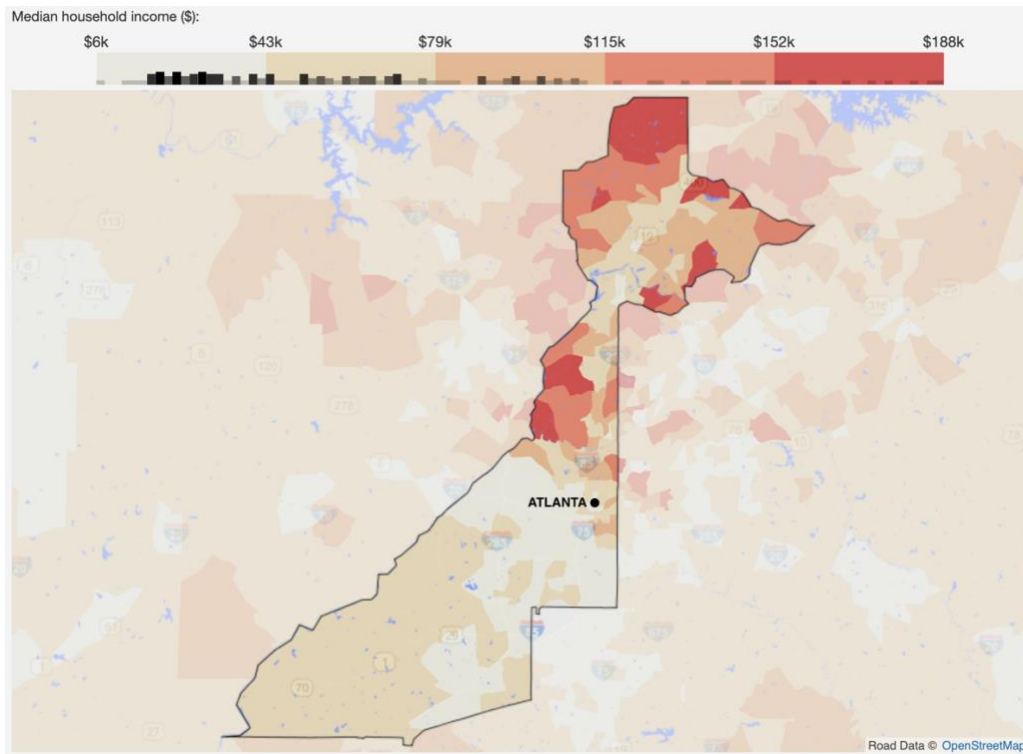


Data Source: © OpenStreetMap Contributors



Data Source: © OpenStreetMap Contributors

Median Household Income by Census Tract in Fulton County, Georgia



Data Source: © OpenStreetMap Contributors

Survey for Residents of Atlanta, Georgia

1. How many years have you lived in the metro Atlanta area? _____ years

This question has been included to gauge the average length of residency within the city amidst its rapid growth over the past decade.

2. If you have lived in the metro Atlanta area for less than 5 years, where did you move to the area from? _____

This question is meant to gain a better understanding of the main sending-areas for Atlanta's significant emigration over the past 5 years.

3. Do you plan to remain living in the metro Atlanta area for the next 5+ years?
 - Yes
 - No
 - Don't Know

This question is intended to gauge how permanent Atlanta residents consider their residency within the city to be amidst the city's rapid growth. This question is intended for both long-time residents and newer residents.

Respond to the following 7 statements according to how strongly you agree or disagree with each.

4. My neighborhood has significantly changed over the past decade:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question is provided to measure the perceived effect of Atlanta's growth and change among the city's neighborhoods. It is intended mainly for the city's long(er) term residents.

5. Local government is doing a good job at managing growth and development in my neighborhood:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question is meant to gauge the perceived control (or involvement) of the city government regarding its rapid growth and development. It is geared especially toward long(er) term residents who have experienced the city both before and during its period of rapid growth.

6. I feel that my identity and identities similar to mine are well-represented in my neighborhood:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question is an attempt to identify and measure any perceived isolation among Atlanta's many identity groups as the demographics continue to undergo significant change.

7. Racial tensions are a significant factor in my neighborhood:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

Given that Atlanta is fast approaching a change in the city's majority racial group, this question is provided to gauge the potential negative effects of that change.

8. There are a sufficient amount of affordable housing options within my neighborhood:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question is provided to gauge the Atlanta's perceived affordability, especially among its less-affluent residents, amidst the continued increase in higher income residents.

9. My neighborhood needs more retail options:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question was provided because of the 2017 Downtown Atlanta Master Plan's emphasis on the need for more retail options. While the Master Plan claimed to determine this through open-ended response survey questions, I am intentionally changing the question format to see if the type of response changes.

10. I frequently interact with my neighbors:

Strongly Disagree Disagree Neither Agree/Disagree Agree Strongly Agree

This question is provided to gauge the perceived level of interaction among community members as the city grows rapidly. It is provided to determine whether isolation may increase within neighborhoods as they grow.

-
11. I live in the following housing type:

- single-family house
- 2-family house (duplex)
- Rowhouse or Townhouse
- Apartment Building
- Loft
- Other (SPECIFY) _____

This question is provided to determine the housing trends with respect to the city's different demographic groups (see Questions 17-19 for questions regarding demographic parameters).

12. Ideally, I would prefer to live in the following housing type:

- single-family house
- 2-family house (duplex)
- Rowhouse or Townhouse
- Apartment Building
- Loft
- Other (SPECIFY) _____

This question is provided to identify housing preference with respect to the city's different demographic groups. It is also meant to forecast possible trends in the city's housing market.

13. Do you use public transportation regularly (1 or more times a week)?

- Yes
- No

This question is mainly provided to gauge the popularity of the city's MARTA transit system as it undergoes continued growth and improvements. Given the emphasis on the need for public transit in the city's Downtown Master Plan, this question is meant to give solid data on the system's current usage rate.

14. If you use public transportation regularly (1 or more times a week), are you satisfied with the current public transportation system?

- Yes
- No
- I am indifferent

This question is meant to verify the accuracy of the Downtowns Master Plan's determination that residents are not fully satisfied with the city's public transit system.

Provide a short response to the following questions.

15. If there was one thing that could be changed about the public transportation system, I would want it to be: _____.

This question is provided to gain more qualitative information regarding the specific improvements the city's public transit system may need, according to its residents.

16. If I had to pick just one, the most important issue I think the city needs to confront is: _____.

Considering that I am interested in the possible “growing pains” that may accompany the city’s rapid growth, this question is meant to gain more fine-grained qualitative information on what those growing pains might look like.

17. I identify As:

- Black/African American
- Hispanic or Latina/o
- White/Caucasian
- Asian
- Other (SPECIFY): _____

This question is provided to identify a point-in-time account of Atlanta’s racial and ethnic demographics. It is also meant to be analyzed in conjunction with many of the other questions provided in the survey.

18. How many people live in your household?

- One
- Two
- Three or More

This question is provided to identify the current housing composition of Atlanta’s residents amidst its rapid demographic changes. It is also meant to be analyzed in conjunction with Question 19.

19. What was your *total* household income before taxes for the year 2019?

- Less than \$20,000
- \$20,000 - 39,999
- \$40,000 - 59,999
- \$60,000 - 79,999
- \$80,000 - \$99,999
- \$100,000 - 124,999
- \$125,000 or more

This question is meant to be analyzed in conjunction with question 18 to determine the per-capita income income of households in Atlanta.