

Town Center LCI

The City of Monroe, Georgia



***Tunnell-Spangler-Walsh and Associates
Keck & Wood, Inc.
Arnett Muldrow & Associates
January 2008***

Greg Thompson

Mayor, City of Monroe



Monroe City Council

Lee Malcom, District 1

Denise Dixon, District 2

Jerry Smith, District 3

Cliff Peters, District 4

Rita A. Scott, District 5

Wayne Adcock, District 6

Nathan Little, District 7

Jimmy Richardson, District 8

Julian Jackson, City Administrator

Table of Contents

Section 1: Inventory and Analysis

1.1	Overview	1:1
1.2	Land Use & Zoning	1:5
1.3	Community Patterns	1:11
1.4	Transportation	1:25
1.5	Demographics & Markets	1:31
1.6	Public Facilities	1:38
1.7	Environment & Open Space	1:40

Section 2: Visioning

2.1	Public Process.....	2.1
2.2	Goals & Objectives	2.6
2.3	Vision.....	2.7

Section 3: Recommendations

3.1	Overview	3:1
3.2	Land Use & Zoning Recommendations	3:3
3.3	Community Pattern Recommendations	3:11
3.4	Transportation Recommendations	3:14
3.5	Demographic & Market Recommendations	3:20
3.6	Public Facility Recommendations	3:23
3.7	Environment & Open Space Recommendations	3:24

Section 4: Implementation

4.1	Action Program.....	4:1
4.2	Land Use & Zoning Changes.....	4:10
4.3	Population & Employment Projections	4:11
4.4	Consistency with LCI Components	4:13

Section 5: Appendix

This page is intentionally left blank



Town Center LCI
Section 1:

*Inventory and
Analysis*

January 2008

This page is intentionally left blank

Table of Contents

1.1 Overview 1:1

1.2 Land Use & Zoning 1:5

1.3 Community Patterns 1:11

1.4 Transportation 1:25

1.5 Demographics & Markets 1:31

1.6 Public Facilities 1:38

1.7 Environment & Open Space 1:40

This page is intentionally left blank

1.1 Overview

This section provides an overview of the Livable Centers Initiative (LCI) program and a summary of existing conditions in the Monroe Town Center LCI Study Area. Study Area components are divided into functional categories for the purpose of organization. In this section, background information is provided on the importance of each analysis, existing conditions are described, and strengths, weaknesses, opportunities and threats associated with each are summarized for each category.

Purpose of the Study

The LCI program is intended to promote greater livability, mobility and development alternatives in existing corridors, employment centers, and town centers. The rationale behind the program is that directing development towards areas with existing infrastructure will benefit the region and minimize sprawling land use patterns. Minimizing sprawl, in turn, will potentially reduce the amount of vehicle miles traveled and the air pollution associated with those miles. Lastly, the LCI program is using the successful 1996 Olympics model to promote the concept that investment in public infrastructure will spur private investment. Thus, the LCI program is a vehicle whereby the Atlanta Regional Commission (ARC) can attempt to direct mixed-use and mixed-income development towards existing infrastructure by providing study and implementation dollars.

In this context, the City of Monroe seeks to develop a long-term vision for promoting growth within its downtown core, along Broad Street, and in nearby neighborhoods by promoting visual appeal, establishing a compatible mix of land uses, preserving local identity, ensuring multiple transportation options, reducing truck traffic, improving public safety, and supporting economic development. This Study will assist the community in defining their vision and creating a master plan that uses transportation improvements, land use policies, and sound urban design to improve the quality of life in the station area and nearby neighborhoods. Recent downtown revitalization successes and coming development pressure from metropolitan Atlanta have highlighted the need to establish a proactive long-term vision for the Broad Street corridor. By recognizing existing challenges and building upon opportunities, the Study is intended to serve as a guide for positive change that both benefits the immediate area and the citizenry of Monroe.



Regional land use policies encourage the creation of walkable, mixed-use centers with vibrant sidewalk life



Healthy communities provide opportunities to safely walk or bike to shops



Downtown Monroe has seen significant revitalization in recent years

The goals of the Monroe Town Center LCI, as established by the requirements of the Atlanta Regional Commission’s Livable Centers Initiative program, are to:

- Encourage a diversity of medium to high-density, mixed-income neighborhoods, employment, shopping and recreation choices at the activity and town center level.
- Provide access to a range of travel modes including transit, roadways, walking and biking to enable access to all uses within the Study Area.
- Encourage integration of uses and land use policies/regulations with transportation investments to maximize the use of alternate modes.
- Through transportation investments, increase the desirability of redevelopment of land served by existing infrastructure at activity and town centers.
- Preserve the historic characteristics of activity and town centers and create a community identity.
- Develop a community-based transportation investment program at the activity and town center level that will identify capital projects, which can be funded in the annual Transportation Improvement Program (TIP).
- Provide transportation infrastructure incentives for jurisdictions to take local actions to implement the resulting activity or town center study goals.
- Provide for the implementation of the Regional Development Plan (RDP) policies, quality growth initiatives and Best Development Practices in the Study Area, both through local governments and at the regional level.
- Develop a local planning outreach process that promotes the involvement of all stakeholders particularly low income, minority and traditionally under-served populations.
- Provide planning funds for development of activity and town centers that showcase the integration of land use policy and regulation and transportation investments with urban design tools.

Additional local goals can be found in Section 2: Visioning.



LCI communities should provide a range of transportation options



LCI communities should preserve their historic character and sense-of-place



LCI studies should provide an open and inclusive public planning process

Regional Context

The Study Area is located in the City of Monroe in Walton County, approximately 40 miles east of Atlanta along US 78. Walton County is a historically rural area that has experienced significant growth pressure from metropolitan Atlanta in recent years. As its county seat and its largest city, these pressures have begun to be felt in Monroe, especially along the city's western side.

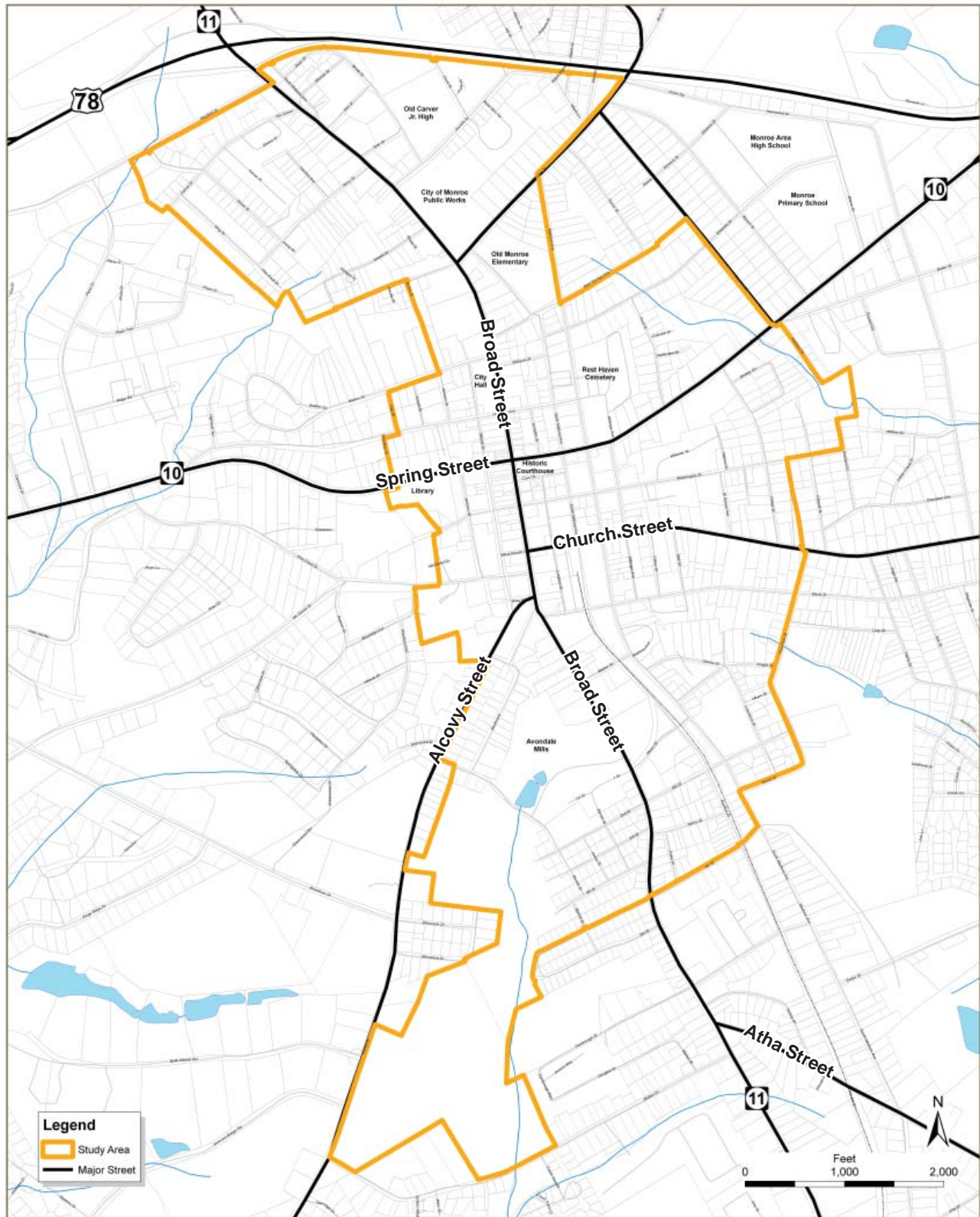
Study Area Boundaries

The Study Area is centered along Broad Street from its intersection at US 78 south to 5th Street, including the entire Avondale Mill property. It extends for several blocks east and west, including Alcovy Road on the southwest, and Glen Iris Drive on the northeast. The Study Area encompasses 797 acres and most of historic Monroe.



Monroe is the county seat of Walton County

Figure 1.1: Study Area Overview



1.2 Land Use & Zoning

Existing Land Use

Land uses and the relationship between them impact the quality of life in a community. Different land uses have varying impacts on transportation and utility systems. The arrangement of land uses and their proximity also support or discourage different modes of transportation, including bicycling and walking; this can directly impact the vehicular system by reducing or increasing traffic.

Cities such as Monroe were traditionally built as mixed-use environments featuring housing, shops, offices, religious institutions, schools, parks, and factories all within a short walk of one another. As the benefits of mixed-use areas are rediscovered, it is increasingly important to understand the uses that can operate within an acceptable walking distance. Many uses are compatible, including retail, office, open space, civic, and residential uses. Others, such as industrial and transportation services, are more difficult to reconcile in a mixed-use setting.

Existing Conditions

Because the Study Area includes most of historic Monroe, it contains many land uses, including civic, commercial, industrial, institutional, and residential uses. See Table 2.1 for details.

At the core of the Study Area is a primarily commercial and civic downtown dating from the pre-automobile age when different uses

Table 1.1: Existing Land Use Summary

Land Use	Parcels	Acres	Percent of Study Area
Single Family Residential	656	255.5	32.1%
Multifamily Residential	5	25.3	3.2%
Mixed-Use	6	1.5	0.2%
Commercial	251	144.9	18.2%
Industrial	6	42.3	5.3%
Public/Institutional	53	96.5	12.1%
Parks/Open Space	7	22.8	2.9 %
Vacant/Parking	32	162.4	20.4 %
Streets/Railroads	n/a	45.8	5.7&
Total	1.016	796.9	100.0%



The old City Hall is currently awaiting a new use



The First Baptist Church is one of the notable civic land uses in the Study Area



Low density single family land accounts for a large portion of the Study Area

were within walking distance. This area also contains vertical mixed-uses with homes or offices are located over ground floor shops. Land uses are most intense and pedestrian-oriented along Broad Street, but transition to automobile-oriented, single-story commercial uses and parking at the fringes. Other automobile-oriented commercial uses are found on the SR 11 corridor beginning downtown and extending north to US 78 and south to the Avondale Mill. They are also present along Spring Street east and west of downtown.

Beyond downtown's core and the Study Area's major streets, most of the Study Area consists of residential land uses. These include detached single-family homes, duplexes, and multifamily uses. These tend to be within walking distance of commercial areas and many of their inhabitants do, in fact, walk to them.

Open space is found across the Study Area and includes parks, undeveloped land, and cemeteries. The southwest portion of the former Avondale Mill is heavily forested, while industrial land uses can be found in the northeastern portion of the site.

Strengths

- Fine-grained land uses, which can minimize travel distances and support walking
- Established well-connected residential areas near downtown, which provide a local sense-of-place
- Recent mixed-use re-use of downtown buildings, which has brought new energy to the Study Area

Weaknesses

- Auto-oriented commercial uses north, south, east, and west of downtown, which create negative entries into Monroe
- High percentage of rental housing, which destabilizes neighborhoods
- Building disrepair in many areas, which creates visual blight and threatens public safety

Opportunities

- Redevelopment of under-utilized and abandoned mills, which could support new growth
- Older commercial strips leading into downtown, which could be redevelopment opportunities
- Vacant schools, which could be converted to new uses
- Marginal commercial land uses ringing downtown, which could provide redevelopment opportunities



This home is one of many examples of residential development in established neighborhoods

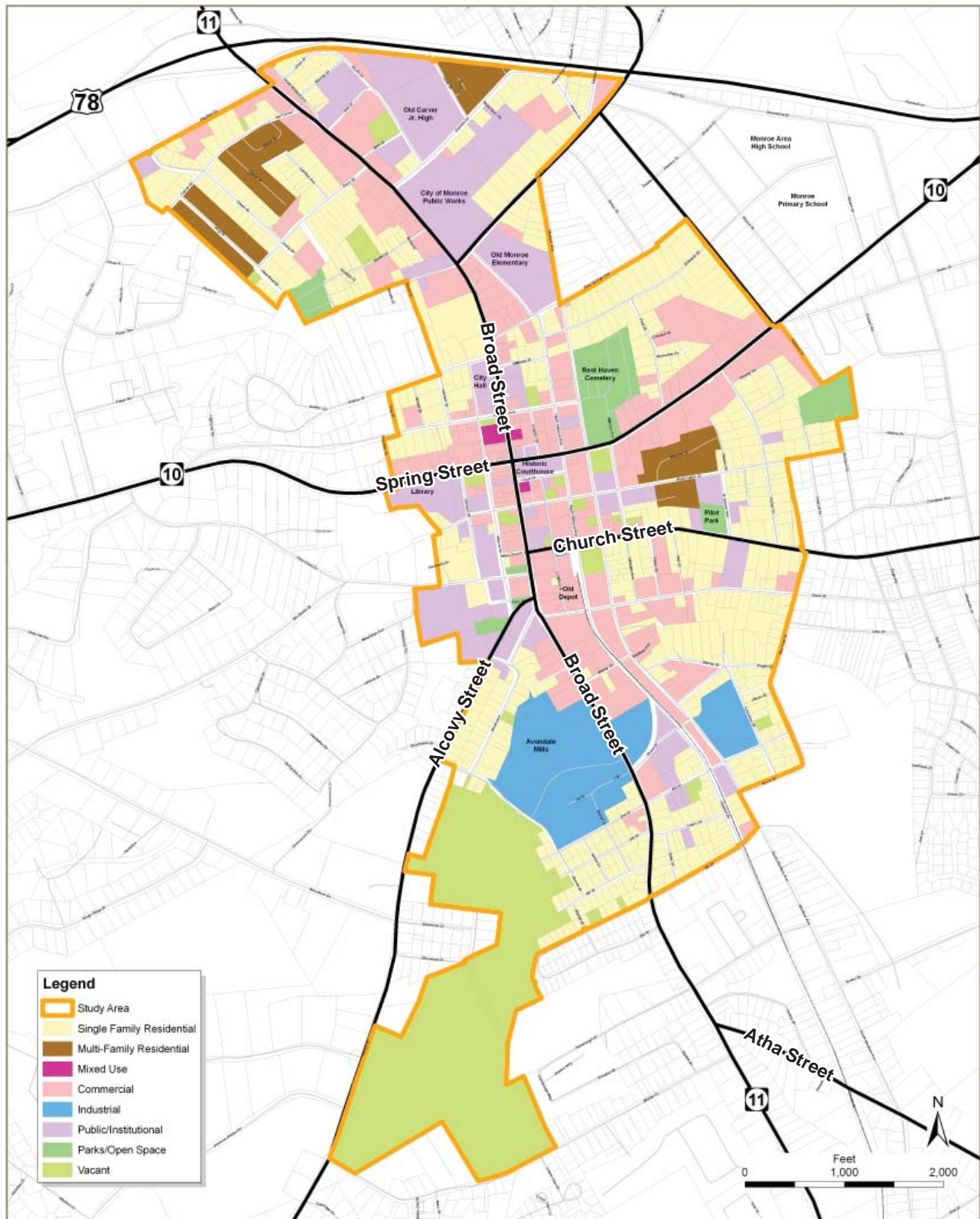


New strip commercial development



A high percentage of homes in the Study Area are renter-occupied

Figure 1.2: Existing Land Use Map



Threats

- Commercial development pressure outside of the Study Area, which could harm the downtown business district
- Further conversion of owner-occupied homes to rental, which could destabilize the Study Area even more
- Commercial or multifamily encroachment into neighborhoods, which could disrupt historic land use patterns

Existing Zoning

The City of Monroe regulates development through the use of zoning. Zoning districts control things such as height, use, setbacks, parking, etc. They are the implementation tool of the City's comprehensive plan and should support the desired future land uses. Since zoning directly shapes development, it has a profound impact on the built environment. More than any other single element, zoning affects how a community looks and functions for decades.

Within the Study Area, most of commercial properties are zoned General Business (B-2) or Highway Business (B-3). These are single-use commercial designations with no design guidelines or other provisions to support the traditional commercial land use patterns found in Monroe. Within the downtown core, a small Central Business District (CBD) overlay exists which allows for accessory apartment and building setbacks that are keeping with the historic land use patterns, but this district is limited to four blocks around the old courthouse. The Professional (P) district also permits a limited degree of mixed-use development

Other than P and CBD, all districts in the Study Area are single-use. To protect residential areas from commercial encroachment, R-1, R-1A, and R-2 permit no commercial uses. Similarly, in the Wholesale and Light Industrial District (M-1) no use other than manufacturing is permitted. While this is certainly appropriate for heavy industries and industrial parks, it may not be appropriate for a less intense industrial, housing, office, and retail mix found at many rehabilitated mills across the nation, including many similar to Avondale Mills.

Current zoning also fails to provide design standards to ensure that development is consistent with the historic character of Monroe. Current zoning has permitted the auto-oriented commercial uses ringing the downtown. For example, B-2 and B-3 have 10-15 foot and 25-35 foot front setback, respectively, which prohibits the street-oriented buildings found in older parts of Monroe.



CBD zoning has supported the re-use of historic buildings

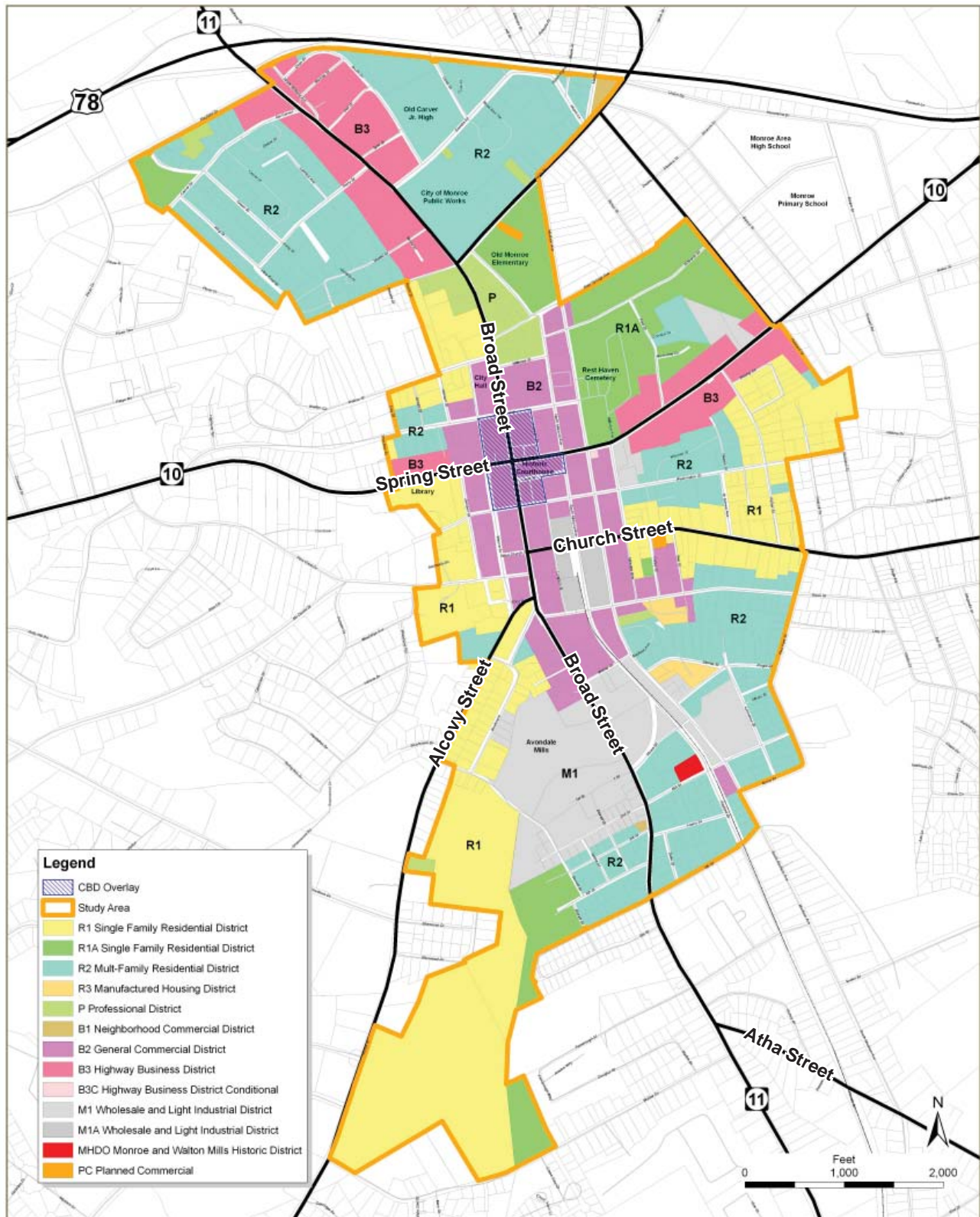


Zoning allows new buildings to resemble Anywhere, USA, rather than historic Monroe



B2 zoning has allowed Spring Street to develop as a commercial strip east of downtown

Figure 1.3: Existing Zoning Map



Parking requirements in the present zoning are also challenging for downtown revitalization. Parking ratios are higher than those typically found in settings similar to Downtown Monroe, and can make it challenging to re-use existing buildings or build new ones that match the town's historic urbanism. This is particularly true for housing, where there is a requirement for two spaces for each dwelling under 1,000 sf, and three spaces for each over 1,000 sf. This is higher than the one space per bedroom standard found in many communities. Additionally, the requirement that all parking be on-site is challenging because downtowns often rely on shared parking lots, parking decks, or on-street spaces.

Strengths

- CBD zoning allows for mixed-use, zero setback buildings in a four block area, which has allowed upper story lofts
- Existing residential districts, which prevent commercial encroachment into neighborhoods
- P zoning, which has encouraged the preservation of historic homes by allowing them to be used as offices

Weaknesses

- Lack of design requirements in most districts, which has resulted in buildings that are out-of-character
- B2 zoning on Broad and Spring Streets, which has encouraged commercial strip development
- B3 zoning surrounding downtown, which fails to provide for the expansion of downtown's historic mixed-use character
- The sign ordinance, which has been identified as a major challenge by many businesses
- Parking regulations, which are higher than those found in many revitalizing downtowns

Opportunities

- Zoning text and map changes, which could support appropriate new development densities

Threats

- No change to zoning



Woodstock, GA, uses zoning to encourage compatible new development



Zoning required this CVS in Davidson, NC, to match the area's historic pedestrian-friendly character



Monroe's new CVS is a conventional prototype with frontal parking

1.3 Community Patterns

Communities are defined by the physical patterns of their streets, blocks, lots, and buildings. When viewed together, this interconnected relationship defines a community's structure that speaks of the past, present, and into the future. The individual elements represent the fundamental components of town planning and must be carefully understood for to their implications on transportation, land use, and economic development.

Street and Block Patterns

Streets and blocks are the most important defining characteristics of a community. While buildings and land uses often change, the platting pattern of a community often remains unchanging over the centuries. Blocks and streets can be thought of as the “bones” of a community. As bones determine a person's height, blocks and street patterns determine stature and looks, directly affecting a community's form and the importance of key sites within it. There are two principal types of blocks and street patterns:

Interconnected street systems are made up of a series of small and medium sized streets arranged in a grid or modified grid pattern. In this pattern, virtually all streets connect to other streets. This provides small blocks, ensuring many possible routes of travel and eliminating the need for wide and high traffic arterials and collectors. The interconnected street pattern encourages walking, bicycling and other forms of non-motorized transportation because it increases the likelihood of being able to make a trip without being forced onto a high-speed, high-volume arterial or collector. It also tends to support pedestrian-oriented land uses by allowing land uses to be closer together, thus increasing the opportunities for shared parking and pedestrian-oriented streetscapes.

Dendritic or tree-like street systems are made up of many small and disconnected local streets that feed into fewer collector streets that, in turn, feed into even fewer arterials. Because this pattern contains many dead-end local streets, it forces all traffic onto collectors and arterials, resulting in large block sizes and increased trip distances. The dendritic pattern tends to discourage walking, encourage traffic congestion on collectors and arterials, and create a transportation system that is prone to shutdown when accidents disrupt traffic on collectors or arterials. Its creation of longer trips also supports conventional suburban-style land uses marked by their automobile orientation, separation of use, and disregard for the quality of the streetscape. These great distances also impact



Guiding principles of urban design inform the built environment, as seen in Downtown Monroe



An interconnected street system allows multiple route options, with a trip from A to B at a distance of one half mile



A dendritic street system allows fewer choices of travel, with a trip from A to B at a distance of one mile

the ability of emergency vehicles to respond to situations in an efficient manner.

“Smart growth” principles support an interconnected system over a dendritic system because it balances pedestrian and vehicular needs better. Both cars and pedestrians operate more efficiently when many routes of travel, shorter distances, and more direct trips are available. Generally, the largest a block should be is 800 feet in length or 3,200 feet in perimeter, although between 200 and 600 feet in length or 800 to 2,400 feet in perimeter is more desirable. In developed areas with an existing dendritic system, achieving this can be a challenge because interconnected systems work best over a large area. In most places the reality is that arterials and collectors serve transportation needs that extend beyond the immediate area. Even so, a localized interconnected system can reduce congestion on these streets by dispersing local trips.

The arrangement of streets can be used to define key public spaces and building sites. In traditional community design, important buildings were often located at the end of a street vista. Similarly, parks and open spaces were always defined by streets to ensure maximum public access and safety.

Existing Conditions

Most of the Study Area exhibits an interconnected street system and smaller block patterns, such as in the historic area of the downtown and older neighborhoods near it, while only a few newer areas exhibit larger blocks and a more dendritic street system.

Strengths

- Streets are interconnected, for the most part
- Blocks are generally small

Weaknesses

- Cut through traffic, which occurs on some small neighborhood streets

Opportunities

- Redevelopment of large sites, which could extend and compliment the existing street layout

Threats

- Daytime congestion of downtown streets by truck and through traffic, which is not ideal for merchants



A well connected street system allows multiple travel routes on small streets, such as shown here in South Boston



Small blocks, good sidewalks, and street trees help encourage pedestrian travel and promote good urban design



Congestion of downtown streets by truck traffic

Parcel Patterns

Lots represent the second major element in shaping communities. Like streets and blocks, lot patterns tend to be fixed for long periods, regardless of land use. Historically speaking, lot size was also an indicator of where in the town a lot was located, with the smallest lots containing commercial or mixed-use buildings at the center of town and the largest ones being farm land at its fringes.

Today, with the increasing scale of redevelopment economics and the large amounts of capital necessary to finance infill projects, the notion that lots at the center of a community should be small is no longer universal. Modern financial models often demand that downtown redevelopment occupy an entire block and be undertaken by large developers. As a result, a key challenge to town center regeneration can be the existence of small lots owned by many different owners, particularly if land assembly is critical. In certain cases, however, diverse ownership can be beneficial to creating a rich character and sense of place if smaller lot owners are motivated to develop individual, smaller projects.

Existing Conditions

The Study Area exhibits mostly smaller parcels near downtown and only a few larger parcels for multifamily housing or commercial uses. Additionally, the large former mill are single parcels, and care will need to be taken to make sure that they are redeveloped in a way that fits in with the smaller parcel sizes nearby.

Strengths

- Lots influenced by historic downtown development, which are small and appropriately scaled
- Appropriate scale of neighborhood residential lots

Weaknesses

- Shallow parcel along SR 11 north and south of downtown, which limit redevelopment potential

Opportunities

- Large mill sites, which provide development options and are large enough to positively impact the entire community

Threats

- If larger sites are redeveloped without adjustment to proper urban design principles, they could not blend with surrounding land uses



Large industrial parcels offer various re-development possibilities



Medium to large parcels easily accommodate automobile oriented uses



Historically, small lots were found downtown

Building Patterns

The final element of a community's physical pattern is its buildings. The placement and massing of buildings can work together to form spaces greater than the individual buildings. These different spaces have different impacts on human psychology and the ability of places to support certain activities. For example, most people like to feel protected while walking. This is best achieved by making people feel enclosed. From a psychological point-of-view, a street with a height to width ratio of no more than 1:3 provides the necessary enclosure, with one-to-one being ideal. Therefore, to create an environment where walking is encouraged, the street should respect these ratios, particularly in a downtown environment. Enclosure also has a direct impact on driver behavior. All else being equal, buildings close to the street psychologically narrow it and result in slight decreases in vehicular speeds.

Existing Conditions

The placement of buildings in the Study Area varies, depending on the age and use of the area. In the historic core, along Broad Street, buildings touch each other and are pulled up to the street to form a continuous wall. As one moves away from the core, buildings traditionally become separated and pulled farther from the street. Front yards appear and are often planted with large trees which shade the street.

Residential and commercial buildings in Monroe's historic areas also often have one of four potential ways to engage the street, also called "frontages." These frontages are shown on the following page. Each provides buildings that serve the needs of their users, while enriching the adjacent street.

Newer development does not respect any of these traditional town-making patterns found in Monroe. Most buildings in the city are pulled back from the street many feet, and often have a large parking lot between the building and the street.

Strengths

- Proper building placement can be found in and around the downtown area, where buildings meet the sidewalk and provide a pleasant streetscape appearance
- Four traditional building frontage types existing in Monroe and enrich the experience along many streets



Small lots contain small building patterns, placed at the front of the parcel to meet the sidewalk



Historic mill sites include extinct building types and offer an opportunity for redevelopment on large parcels



Larger, more sparse building patterns exist near the edges of the study area and are primarily automobile oriented

Weaknesses

- Sparse building patterns found along the periphery of downtown, which hinder pedestrian activity and connections

Opportunities

- Redevelopment opportunities, which provide the chance to showcase proper building patterns that respond to the human scale

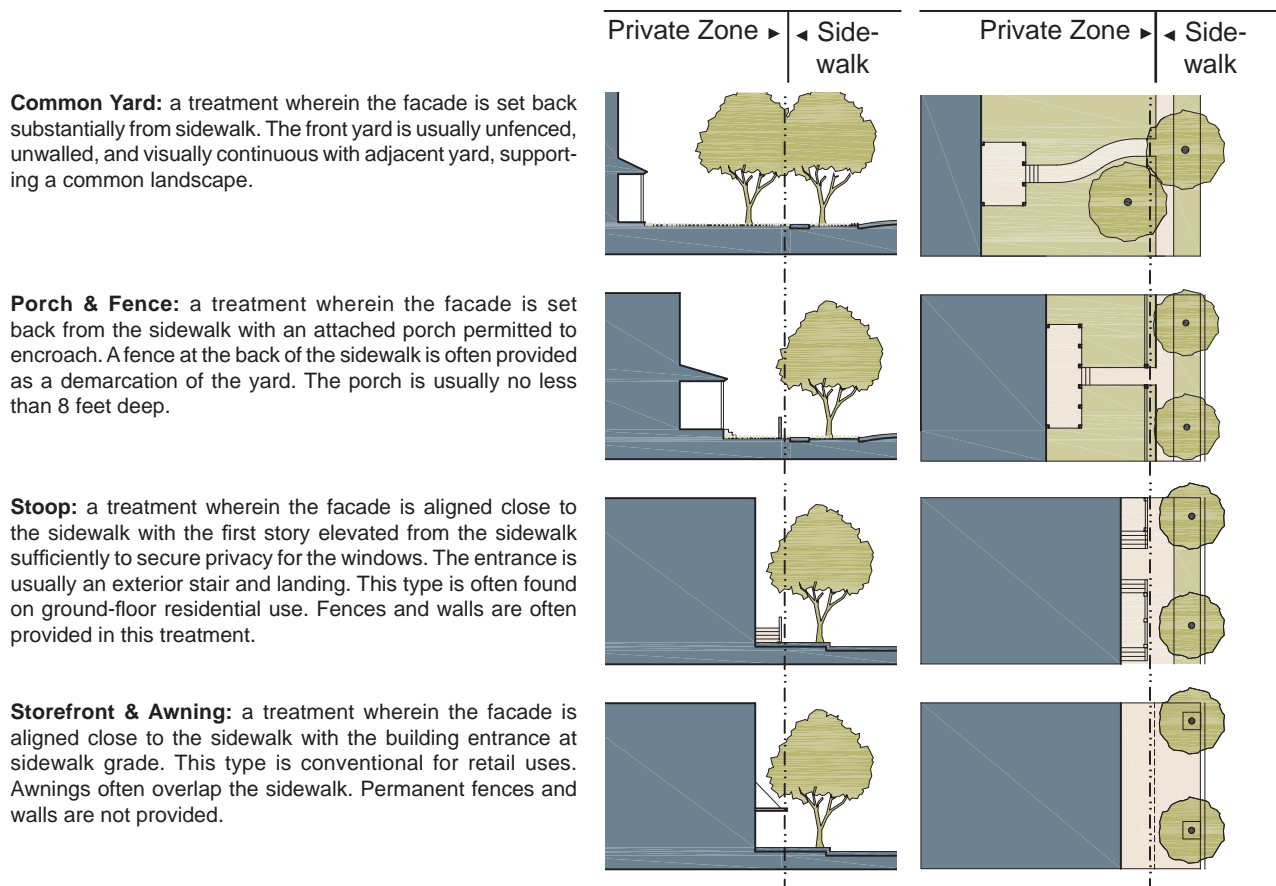
Threats

- New development, which could occur in a manner that is not consistent with Monroe's local character



This building has a Shopfront & Awning frontage

Figure 1.4: Major Historic Frontages Patterns of Monroe



Graphics courtesy of Smart Code 8.0 and Duany Plater-Zyberk & Co.

Lot Typologies

The variety of lot size and in a community can be used to identify what are called “lot typologies.” These are used to understand the typical on-the-ground conditions of a community. They can then be used to establish zoning that supports the preservation of a community’s land use and design patterns

Existing Conditions

The following graphics identify the five principals lot types identified in Monroe. In general, these lot types occur along a transect that runs from urban (Downtown Core Lot) to suburban (Large Residential Lot). Certain lots, such as civic lots, do not occupy this transect, while others (Suburban Commercial Lot) do not blend in with the traditional patterns of Monroe.

Figure 1.5: Lot Typologies in Monroe

Downtown Core Lot

Lot Width	20 ft. - 50 ft.
Lot Depth	60 ft. - 100 ft.
Lot Area	1200 - 5000 s.f.
Lot Coverage	90% - 100%
Floor Area Ratio	1 - 4
Building Height	2 - 4 stories
Front Setback	0
Side Setback	0
Rear Setback	0 - 15 ft.
Frontage	Shopfront and Awning



Buildings occupy the entire lot



Two story buildings downtown

Traditional Civic Lot

Lot Width	40 ft. - 70 ft.
Lot Depth	60 ft. - 100 ft.
Lot Area	1200 - 5000 s.f.
Lot Coverage	50% - 90%
Floor Area Ratio	0.5 - 1.8
Building Height	1 - 2 stories
Front Setback	0 - 20 ft.
Side Setback	0 - 10 ft.
Rear Setback	0 - 20 ft.
Frontage	Forecourt



Traditional Civic Lots showcase important buildings with slight setbacks



Civic Buildings often are unique in appearance and substantive in materials

Small Residential Lot

Lot Width	25 ft. - 40 ft.
Lot Depth	60 ft. - 120 ft.
Lot Area	1500 - 4800 s.f.
Lot Coverage	40% - 70%
Floor Area Ratio	0.3 - 0.75
Building Height	1 - 2 stories
Front Setback	10 ft. - 20 ft.
Side Setback	10 ft. - 20 ft.
Rear Setback	10 ft. - 20 ft.
Frontage	Porch, Fence, Common Yard



Small Residential Lots near downtown



Small lots have only small setbacks

Large Residential Lot

Lot Width	50 ft. - 100 ft.
Lot Depth	80 ft. - 150 ft.
Lot Area	4000 - 15000 s.f.
Lot Coverage	25% - 50%
Floor Area Ratio	0.1 - 0.5
Building Height	1 - 2 stories
Front Setback	20 ft. +
Side Setback	20 ft. +
Rear Setback	20 ft. +
Frontage	Common Yard



Large homesite buffered with vegetation



Traditional large front lawn and yard

Suburban Commercial Lot

Lot Width	50 ft. - 150 ft.
Lot Depth	60 ft. - 120 ft.
Lot Area	3000 - 18000 s.f.
Lot Coverage	25% - 60%
Floor Area Ratio	0.3 - 0.6
Building Height	1 story
Front Setback	20 ft. +
Side Setback	20 ft. +
Rear Setback	20 ft. +
Frontage	Parking Lot



Parking surrounds auto-oriented commercial establishments



Auto-oriented commercial establishments favor cars over pedestrians

Architecture and Historic Resources

Until the early twentieth century, architecture defined and dignified the public realm. Most intown buildings came up to the sidewalk and fronted it with entrances. Commercial buildings typically incorporated awnings, storefronts, and space for goods or outdoor dining. Residential buildings had stoops, porches, balconies, green courtyards, or a sidewalk bordered by a low garden fence or knee wall. This created buildings that were oriented towards the street and with a clear division between public and private space.

With time, deeper building setbacks were used. In the streetcar suburbs of the early 1900s, houses were usually between ten and 30 feet from the sidewalk. As with older villages and towns, most early suburbs were within a five-minute walk of a small commercial center or a trolley stop.

Style variations notwithstanding, building design remained stable from 1900 until World War II. This all changed after World War II, when the car became the primary transportation mode. With it, commercial and residential environments changed from pedestrian-oriented to vehicle-oriented. Highway standards and codes sympathetic to drivers were enacted, and architecture and building placement became focused on the car's needs. The speed at which people experienced towns increased and buildings were placed farther from the street to accommodate parking. As a result, building detailing became less important than rapid identification. Architecture became secondary to recognition; a few shrubs, trees, flowers, and large signs became more important than respect for neighborhood character or the public realm.

Today, American architecture is still defined by recognition. Chain retailers look the same everywhere, and houses are sold based on "curb appeal". The exteriors of buildings are now insignificant. As a result, much of America's newer areas are visually monotonous. This proliferation of "cookie-cutter" buildings means that historic buildings have become critical to preserving local identity and a sense-of-place. Historic structures are resources that must be preserved and protected. Not only does the preservation of historic structures preserve an architectural legacy, it also preserves the buildings and places that represent a community's collective memory.

There is also an economic benefit to preservation. Many cities have found that the best way to promote future growth is by preserving the past. This is particularly true where historic buildings are of a quality that is financially-prohibitive today. People are



The placement of the building up to the sidewalk defines and encloses the street



Over time, deeper setbacks were used to accommodate the automobile



Preserving the past preserves architectural legacy and represents a community's collective memory

increasingly drawn to communities with a sense of character and history. In addition, “place-oriented” retail has become one of real estate’s hottest commodities, with many new “Main Streets” under construction across the nation. Given this demand, a historic town can be positioned to capture this growing market.

Existing Conditions

There are many historic resources in the Study Area. Downtown businesses and residences are well maintained and preserved, adding to the quaint and historic feel of Monroe. Large estate homes and well-proportioned, modest residences flank the main streets near downtown and add to the charm of the area.

Manymore modest neighborhoods contain well maintained structures on small lots, creating complete streetscapes and a strong identity. However, there are also many of structures in disrepair and neglect, on the verge of being unsafe for occupancy. A careful balance must be found and maintained between revitalization of certain parcels and providing affordable housing within the Study Area.

The architectural styles of the Study Area’s neighborhoods include the following major styles:

- **Neoclassical** (1895-1950), which has facades defined by simple massing, front or side-gabled roofs, full-height porches with roofs supported by classical columns, often with Ionic or Corinthian capitals. The facades have symmetrically balanced windows and centered front doors.¹
- **Queen Anne** (1880-1910), which is defined by asymmetrical facades with partial or full-width porch usually one story high and extending along one or both side walls. The roof is usually steeply pitched roof with an irregular shape and a dominant front-facing gable. Patterned shingles and cutaway bay windows are some of the devices used to avoid a smooth-walled appearance.²
- **Colonial Revival** (1880-1955), which is defined by symmetrically balanced windows, frequently in adjacent pairs, and an accentuated front and center door. The roofs are usually hipped with a partial or full-facade porch. The entrance details include porches supported by slender columns, accented with overhead fanlights or sidelights.³

¹ McAlester, Virginia, *A Field Guide to American Houses* (New York: Alfred A. Knopf, Inc., 1994) 343.

² McAlester 263.

³ McAlester 321.



Place-oriented retail in a preserved depot building



Many historic homes exist in the Study Area, such as this Colonial Revival home



A Neoclassical style landmark along South Broad Street

- **National Folk** (1850-1890), which is defined by simple massing, usually simple single-gabled roofs, simple shed porch roofs, and uniform roof heights. Buildings are usually clad in horizontal clapboard siding and have vertically proportioned windows. This style represents an interpretation of traditional local housing types utilizing mass-produced materials transported from other parts of the nation. As such, this style exhibits some geographic variations.⁴
- **Craftsman** (1905-1930), which is defined by low pitched, gabled roofs (occasionally hipped) with wide, unenclosed eaves, beams and exposed rafters. Porches are always provided and are usually full or partial width and with roofs supported by tapered, square columns. These homes usually have a one story or “bungalow” form, although examples of two story craftsman homes may be found.⁵
- **Minimal Traditional** (1935-1950), which is defined by a reference to earlier styles, but lacking detailing and exhibiting close, rather than overhanging, eaves. These homes usually include a large chimney and at least one front-facing gable. Most are one story, but two-story examples exist.⁶
- **Ranch** (1935-1975), which is defined by a horizontal orientation, built-in garages and asymmetrical one-story shapes with low pitched roofs and large overhangs. These homes often have brick siding, with modest chimneys.⁷

Homes in Monroe’s newer subdivisions often do not reflect the historic styles found in the city. Although, vaguely inspired by historic styles, they generally lack the detail, urbanism, and craftsmanship that mark the original.

Additionally, commercial buildings built since World War II do not reflect the styles or scale found along Broad Street. Most are single use, one story prototypes lacking any architectural detail or reflection of local history. Their horizontal scale also fails to provide for mixed-use and result in every building being an object unto itself, with little compatibility with adjacent uses. The architecture of these buildings is generally unassuming and functional. These commercial buildings are designed to accommodate the automobile and not the pedestrian.



Many of Monroe’s homes built for mill workers are in the National Folk style



A Craftsman home with low pitched roof and wide front porch



A typical Ranch style home with built-in garage or car-port

⁴ McAlester 88.
⁵ McAlester 453.
⁷ McAlester, 478.
⁷ McAlester 479.

Strengths

- Strong local identify, which is enhanced by the large number of historic buildings in Monroe
- Historic civic landmarks, including the old courthouse, the Art Deco former city hall, and others
- Existing historic neighborhoods and homes worthy of renovation and preservation
- Market differentiation, which is provided by historic buildings
- Existing local historic preservation regulations

Weaknesses

- Disrepair and neglect found in many areas, which creates visual blight
- “Cookie cutter” homes and business, which detract from the area’s history

Opportunities

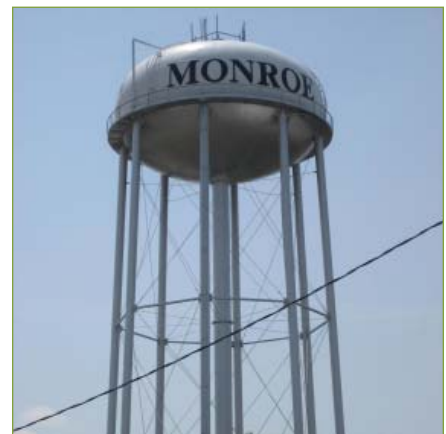
- Infill lot opportunities where housing is in disrepair and revitalization is desired
- Historic styles of Monroe, which could be a model for new development
- Adaptive re-use of old buildings, which could allow older buildings to remain vital parts of the community

Threats

- Incompatible new development
- Lack of maintenance, which could cause historic buildings to be lost by neglect
- The high cost of upkeep on historic homes, which could force many homeowners to demolish or abandon them in favor of newer homes



Historic Mill structures are often ideal for adaptive reuse into residential units or other useable space



The Monroe water tower can be thought of as a local landmark

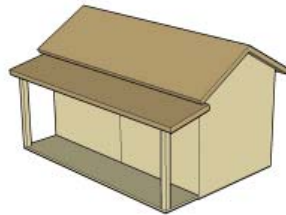
Figure 1.6 Historic Building Typologies in Monroe

Small towns and cities tend to historically contain a limited number of building types. Often these include a range of single-family, mixed-use, and commercial or industrial types.

The following pages contain a summary of the major typologies found in Monroe. Each type contains a summary of general building massing, key design elements, and then two photos showing specific examples of each typology.*

**Not all are from within the Study Area*

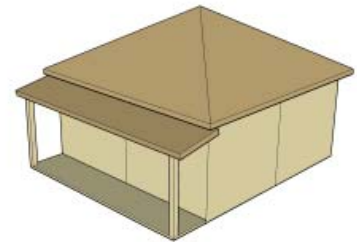
Double Pen



- One Story
- Single-family
- One-room depth
- Two-room width
- Side-gabled roof
- Full-width, one-story front porch



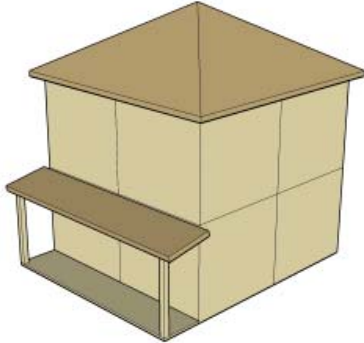
New South Cottage



- One Story
- Single-family
- Two-room depth
- Two-room width
- Pyramidal-hipped, side or front-gabled roof
- Full-width, one-story front porch



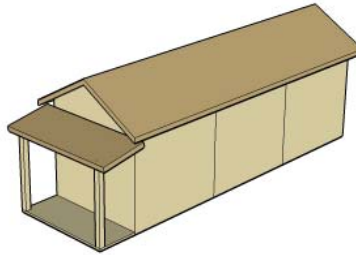
Four-Square Two Stories



- Two Stories
- Single-family or duplex
- Two-room depth
- Two-room width
- Pyramidal-hipped, side or front-gabled roof
- Full-width, one-story front porch



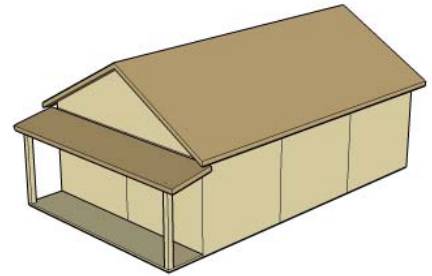
Shotgun



- One Story
- Single-family
- Three-or more-room depth
- One-room width
- Front-gabled roof
- Full-width, one-story front porch



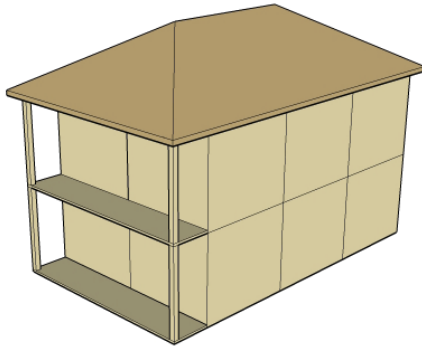
Bungalow



- One Story
- Single-family or duplex
- Three-room depth
- Two-room width
- Front-gabled roof
- Full-width, one-story front porch



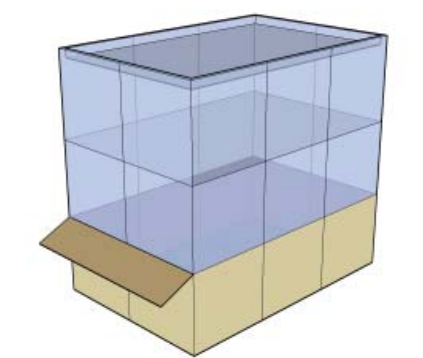
Apartment Block



- Two stories
- Multifamily
- Three-room depth
- Two-room width
- Simple-hipped, front-gabled or flat roof
- Full-width, two-story front porch



Commercial/Mixed-Use



- One to four stories
- Three-room depth
- Two-room width
- Flat parapet roof
- Ground floor retail with residential or offices above
- Ground floor awnings



Mill



- Multiple stories
- Industrial nature
- Several different building forms
- Various depth and width
- Flat and simple gabled roof



1.4 Transportation

Transportation is comprised of several components that encompass a quality transportation network. In Monroe these include traffic, pedestrian systems, and bicycle facilities.

Traffic Systems

Traffic system operations are affected by a variety of factors, including intersection operations, light timings, turning movements, volume, capacity, and speeds. The interface of these different components affects each other and defines the ability of the whole system to operate efficiently and as part of a well-balanced system.

Existing Conditions

The existing street network within the Study Area includes a network of arterials, collectors and local roadways serving regional and local needs. The roadways in the Study Area are primarily two-lane roadways with curbs. The only multilane roadway is US 78/SR 10, an urban freeway, which is the north boundary of the Study Area. Two other state routes pass through the Study Area, one being SR 10 Business (Spring Street) provides west/east regional access to the central business district and SR 11 (Broad Street) provides north/south regional access to the central business district. Both of these are classified as urban principal arterials. Alcovy Street, South Madison Avenue and Marable Street are minor arterial streets running generally south to north. McDaniel Street, East Church Street, West Highland Avenue, Mayfield Drive are minor arterial streets running generally west to east. North Madison Avenue, Felker Street, Glenn Iris Drive and Sorrells Street are collector streets running generally south to north. Walker Drive, East Highland Avenue and Edwards Street are collector streets running generally west to east. Remaining streets are local streets.

There are six traffic signals along Broad Street that include pedestrian signals and crosswalks. They are at Marable, Highland, Spring, Washington, Church and Alcovy. Spring Street has four signals that include pedestrian signals. They are at Wayne, Broad, Midland and Madison. Two other signals in the LCI study area are located at the intersection of McDaniel and West Ridge and also at South Madison and Church. These signals do not have pedestrian signals. There are two caution lights, one at the intersection of East Washington Street and Midland Avenue and the other at Alcovy Street and Breedlove Drive.

Five mile-per-hour speed humps exist on Walker Drive.



Broad Street in Downtown Monroe sees a variety of traffic and is impacted by many different factors

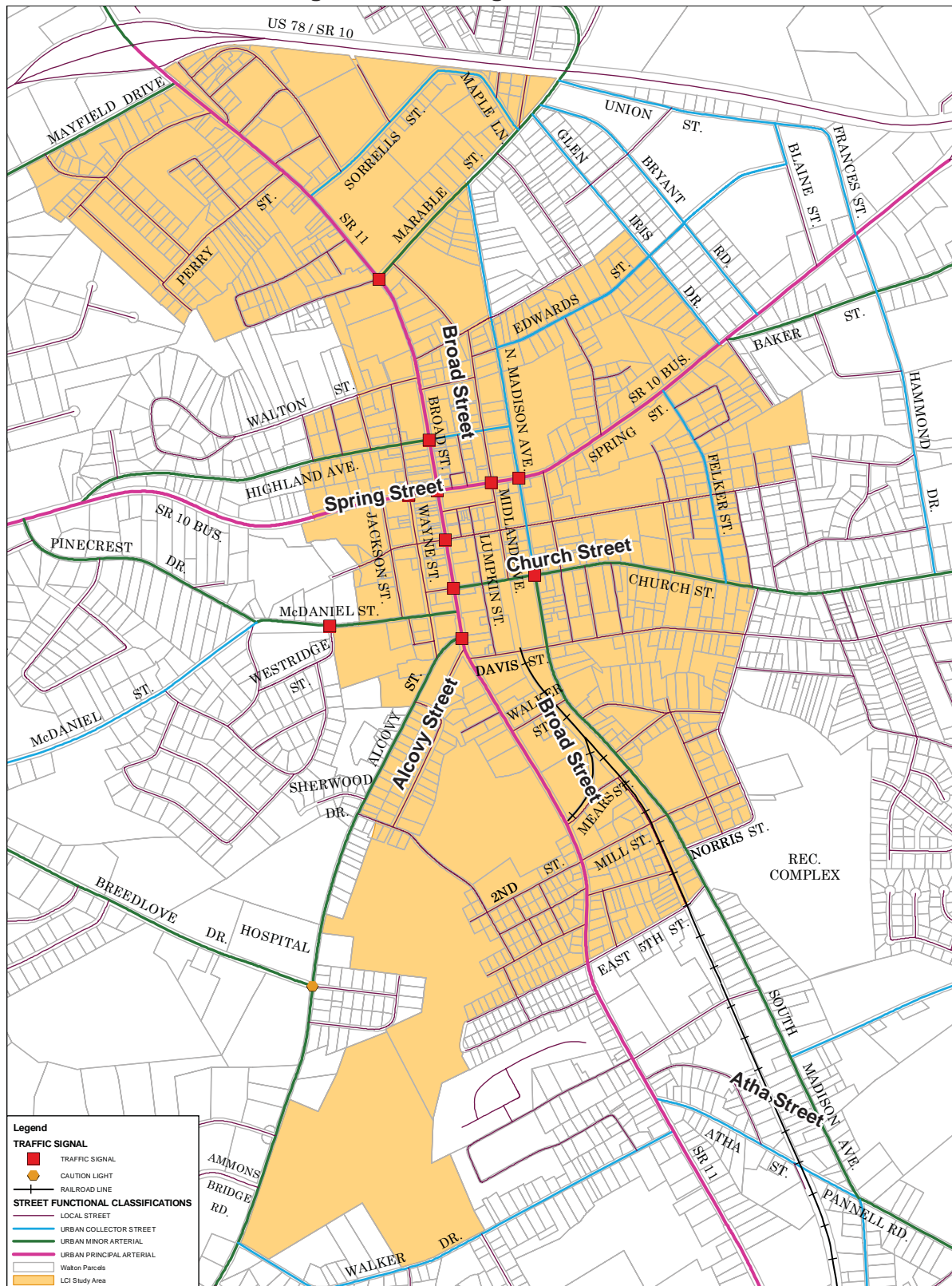


It is important to identify and address key components of our current communities, including situations that are undesirable



SR 10 (Spring Street) includes a center turn lane east of downtown

Figure 1.7: Existing Vehicular Facilities



Diagonal parking is striped along both sides of Broad Street from Highland to Church and along Spring Street from Broad to Midland. Various off-street parking lots are located and accessed from Lumpkin Street, Midland Avenue, Highland Avenue, Madison, Wayne Street and Jackson Street.

Average Daily Traffic (ADT) volumes in 2006 on Broad Street are generally around 15,000 between Davis and Marable. Along Spring Street the ADT is 9,000 from Jackson to Baker. Streets with ADT volumes of around 5,000 are Alcovy, South Madison, McDaniel, Church, and Marable. Streets with volumes around 2,000 ADT are Sorrells, Highland, Felker, Glenn Iris, and North Madison. Walker and Edwards have ADT volumes of around 1,000. These volumes are consistent with the functional roadway classifications. Broad Street and Spring Street having the higher volumes are principal arterials, the minor arterials have the 5,000 ADT volumes and the collector roadways are less, coming in at 2,000 ADT and lower.

The current truck routes through Monroe are the two state routes, SR 11 and SR 10 Business.

Planned projects in the area include a bypass on new location around the east side of Monroe by the Georgia Department of Transportation. Currently the construction is in long range. SR 138 west of Monroe is programmed for widening and reconstruction with construction scheduled for 2012. The project is to include bike provisions. SR 10/US 78 is programmed for widening and reconstruction from the Gwinnett County line to SR 10 Bus. Currently the construction is in long range. Vine Street from SR 11 to Pannell and thence on new location south of the airport to Poplar Street is programmed for widening and reconstruction. The current schedule for engineering and construction is long range. This facility is to include bike provisions. Jersey-Monroe Road, which becomes Alcovy Street, is scheduled for widening and reconstruction from west of Monroe up to SR 11. The current schedule for engineering and construction is long range. This facility is to include bike provisions.

Speed limits within the study area are generally 35 mph. Some areas are 25 mph.

Strengths

- Easy access to US 78
- Little congestion throughout Study Area other than at peak hours and lunch
- Existing interconnected system, which provides multiple route options
- Few recorded accidents involving pedestrians or bicyclists

Weaknesses

- Truck traffic on Broad Street, which significantly impairs downtown revitalization efforts
- Poor signal coordination and timing on Broad Street
- Challenging north-south connections across rail line
- Cut-through traffic is perceived as a problem along: South Madison Street, Jackson Street, McDaniel Street, Church Street, Pinecrest, Highland, North Wayne Street, and Edwards Street
- Parking in the downtown area, which is perceived as a problem by many

Opportunities

- Shared driveways or curb cut restrictions, which could limit traffic conflict points
- Future traffic growth, which could result in lower speeds along pedestrian areas

- A truck route, which could remove truck traffic from Broad Street and could benefit revitalization efforts
- Enforcement of speeding laws, which could slow traffic

Threats

- Well-intentioned street closings, which could have unintended consequences on traffic and speeding
- Further strip development could result in multiple curb cuts

Pedestrian Facilities

Because every trip begins on foot, the walking experience is critical to understanding the current transportation system. Pedestrian trips are also important as they have the opportunity to take the stress off of vehicular systems and create a safer Study Area.

Existing Conditions

The pedestrian experience in the Study Area varies significantly. Facilities are best along Broad Street between Highland Avenue and Davis Street, where a recent streetscape projects provides safe, well-lit sidewalks and street trees. In a portion of this area adjacent on-street parking also buffers pedestrians from traffic. In the portion of Broad Street where the streetscape was not undertaken, sidewalks are generally non-existent. The City of Monroe has applied for a transportation enhancement to extend the current improved pedestrian facilities from Davis Street south to 2nd Street. Such a project would provide a critical link between low-to-moderate income housing and the downtown core.

Off of Broad Street, sidewalks are spotty. Most major streets in the core downtown area have sidewalks on at least one side. These including Spring Street, Wayne Street, Highland Avenue, Midland Avenue, Madison Street, Washington Street, Church Street, and parts of Davis Street. However, there noticeable gaps, including the eastern and western portions of Spring Street, the northern and southern ends of Broad Street, Alcovy Road, and Felker Street. These gaps represent a threat to public safety in these areas.

Strengths

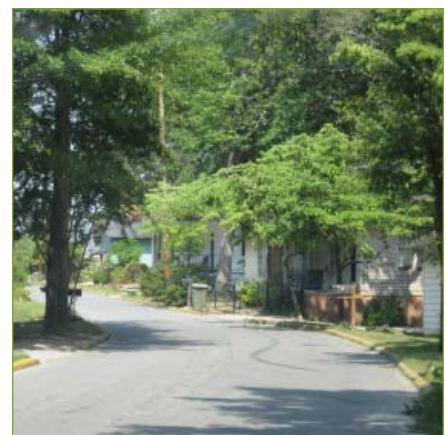
- The proximity of housing and shops, which makes walking a viable transportation choice if facilities are provided
- New and refurbished sidewalks along Broad Street between Davis Street and Highland Avenue
- Large trees on many streets, which shade pedestrians



Pedestrians use the sidewalk to walk to a restaurant in Atlanta



Crape myrtles and new sidewalks provide pleasant walking condition on portions of Broad Street



Sidewalks are lacking in many residential areas

Weaknesses

- Auto-oriented land uses, including frontal parking and buildings set back from the street
- Poorly marked crosswalks, which are hard for drivers to see
- Lack of walkways from buildings to the sidewalk in existing auto-oriented sites
- Lack of sidewalks on key streets, including Spring Street, proportions of Broad Street, and Felker Street
- ADA-compliant pedestrian facilities are lacking at many intersections

Opportunities

- Crosswalks could be better marked on many streets
- Potential pedestrian improvements on major streets, which could improve safety
- Zoning could be used to require wider sidewalks as part of redevelopment
- Future traffic growth could result in lower travel speeds along arterials, which would benefit pedestrians and make walking more viable than driving for short distance trips

Threats

- The continuation of auto-oriented development along arterials, which could degrade the pedestrian environment

Bicycle Facilities

Bicycles are an increasingly important means of transportation. A balanced transportation system should include bicycle facilities . These can take two major forms.

Off-street facilities are generally ten to twelve feet wide paved areas that permit travel in two directions. Lanes may or may not be striped. Usually, these facilities are built in conjunction with greenways.

Bicycle lanes are striped one-way on-street facilities. They are located next to the curb so bicyclists move in the same direction as traffic. In Georgia, bicycle lanes are required to have a minimum width of five feet if they are designated as such. It is possible, however, to stripe narrower widths, provided they are not designated. Lanes are necessary on streets with vehicular speeds greater than 25 miles per hour. On slower streets bicyclists can ride safely with traffic.



Mature trees shade pedestrians but can also buckle sidewalks



When there are no bicycle racks, cyclists will use what is available



“Rails to Trails” projects turn unused rail-road tracks into attractive off-street facilities

Existing Conditions

There are currently no bicycle facilities in Monroe, although the community has expressed a desire for some. Fortunately for those who bike today, many of Monroe's streets are low traffic, low-speed neighborhood streets where it is safe to bike in the lane with traffic.

Strengths

- The compact size of Monroe and its proximity to residential areas, which make bicycling an attractive travel option
- Streets are relatively well connected with low volume, which creates conditions favorable to bicyclists

Weaknesses

- SR 10 and SR 11 are automobile-oriented, which creates a hostile environment toward bicyclists, even to cross the highway
- Lack of bicycle racks, which encourages bicycle storage on other elements in the pedestrian environment

Opportunities

- Creation of an off-street trail through vacant parcels or along rail corridors, which could tie residential areas to parks and open space, downtown, and surrounding communities
- Bike routes, which could be established on streets that are too narrow for bike lanes or multi-use trails

Threats

- Development could bring vehicular congestion and additional curb cuts to area streets



The abandoned rail corridor starting at the old depot could be converted to a multi-use trail



The redevelopment of Avondale Mills could include a multi-use trail

1.5 Demographics & Markets

Demographics and markets are two of the bases of sound planning. These forces often extend beyond the immediate Study Area and must be carefully understood due to their impacts on land use and development decisions.

A disconnect often exists between what is market-viable and what a community desires. In some cases, a community may yearn for more upscale housing or retail than for which market support exists. Given these conditions, a plan must include incentives to support new development, or it must utilize other techniques to increase market demand, such as expanding the potential draw or trade area by creating a unique destination. In other cases, market demand may be very strong, with the total demand for new development far surpassing what the community desires. In this situation, the plan must temper market realities with the will of the community to determine their own future.

Existing Conditions

In understanding Monroe's current market geography, its demographic makeup, as well as the retail and housing demand within the region, sound recommendations for the revitalization of Monroe Town Center can be made. The economic development strategies of this report are based off of true market opportunities, the result of which is a market-based master planning effort.

This market analysis addresses not only the demand within the LCI Study area, but also that within the larger region, as identified by local trade patterns. It presents specific market demand within the trade areas, much of which can be supported within the Monroe Town Center study area. Ultimately, it will be important to develop economic development strategies and incentives to direct these market opportunities to downtown and realize the community's vision as expressed in this master plan.

The analysis began with a market definition exercise that established the true geography of Monroe Town Center's local trade areas. A zip code survey of customers was conducted with the assistance of local areas businesses. From this exercise, both a primary (PTA) and secondary (STA) trade area was determined based on true consumer habits and shopping patterns. The study also established Monroe's place in the regional market, as well as the depth of the overall visitor market. Monroe's trade areas are identified in Figure 1.8.



Both community desires and market demand inform sound planning decisions

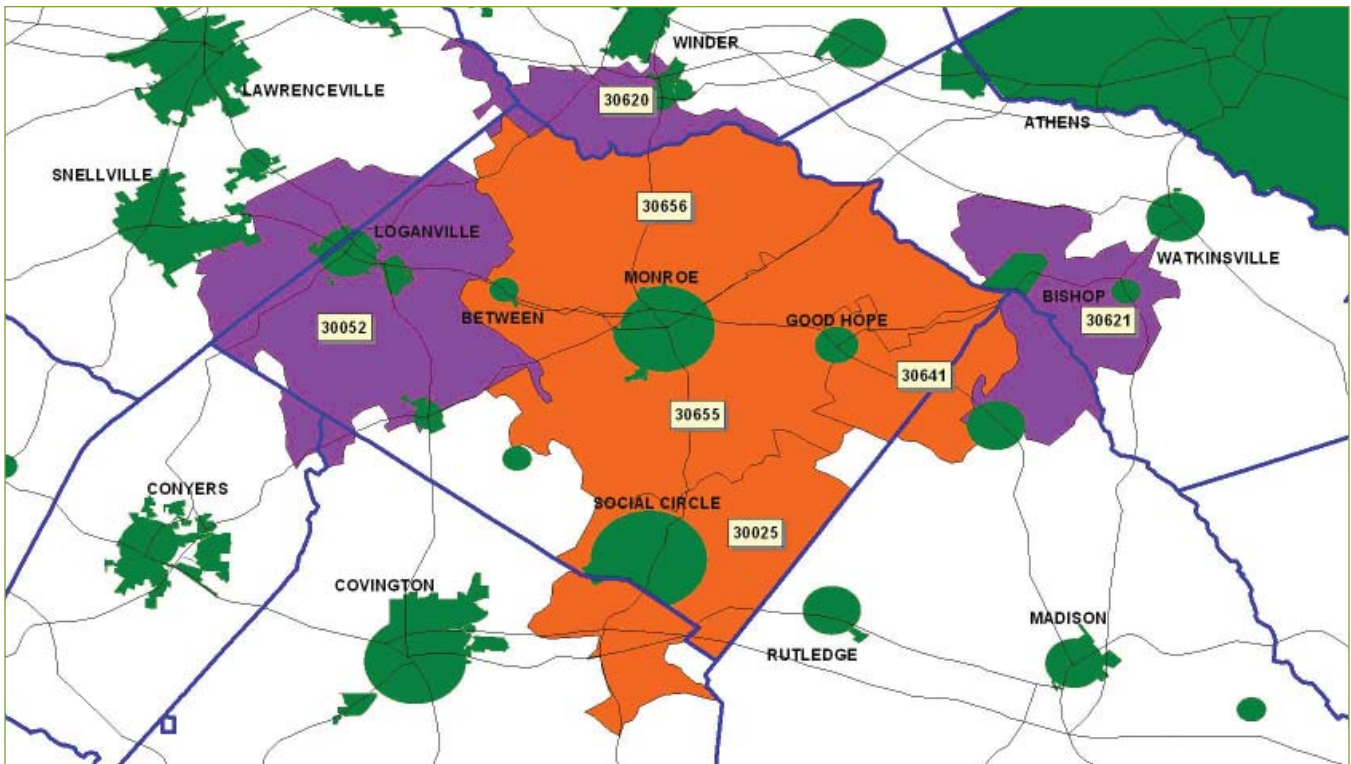


An understanding of demographics and markets is vital to the planning process



New single-family detached homes will be in high demand along with other housing types (see page 1:36)

Figure 1.8: Primary and Secondary Trade Areas



Monroe's LCI study area has a strong local market base with 57% of the customers coming from two Monroe zip codes. Seventy-six percent of all customers come from Walton County, and 86% from Walton County and adjacent zip codes. While there is little penetration into nearby competitive markets of Athens, Atlanta, and Gwinnett County, there is a healthy customer base from Morgan County and Madison. About 12% of customers could be considered "visitors". The trades areas and visitor market did vary depending on the business cluster, and those data are presented in the more detailed market analysis provided in this report.

Demographics & Market Segmentation

Once the primary and secondary trade areas were established for the Monroe LCI area, a demographic snapshot was completed to determine the socioeconomic makeup of Monroe's market. Monroe exists in a rapidly growing corridor to the east of the greater Atlanta region. Both the primary and secondary trade areas have grown tremendously since 1990. The PTA, shown in Figure 1.8, has grown by nearly 4% per year since 2000, with a projected five-year annual growth rate of 3.1%. The City of Monroe is growing as well, although at a slower rate relative to the region. Over the next five years, Monroe's PTA is projected to grow by 15.59% while the STA will increase in population by 24.3%.

Figure 1.9: Population Growth

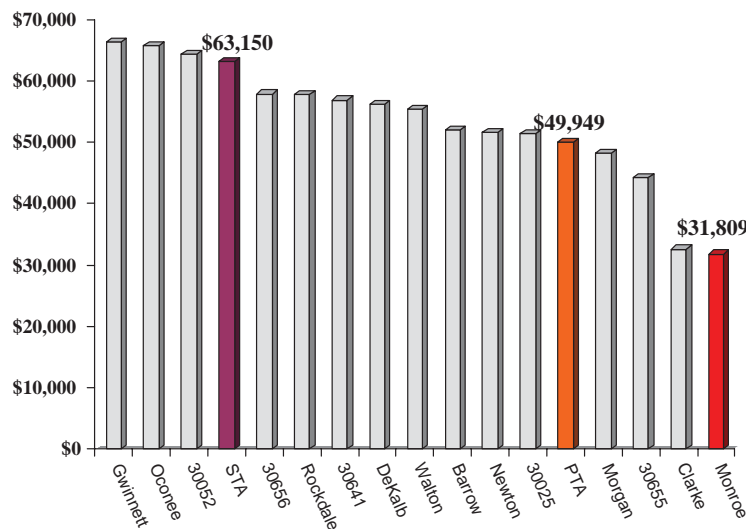
Source: Arnett Muldrow & Associates. Claritas, Inc.

Geographic Area	2000	Average Annual Change (2000-2007)			Average Annual Change (2007-2012)		
		2007	Number	Percent	2012	Number	Percent
PTA							
Population	36,695	46,695	1,429	3.9%	53,975	1,456	3.1%
Households	13,135	16,706	510	3.9%	19,343	527	3.2%
Avg. HH size	2.75	2.75	0	0.0%	2.74	-0.01	-0.1%
City of Monroe							
Population	11,407	12,662	179	1.6%	13,736	215	1.7%
Households	4,287	4,749	66	1.5%	5,157	82	1.7%
Avg. HH size	2.59	2.56	-0.03	-0.2%	2.55	-0.01	-0.1%

A comparison of regional median household income figures shows that Monroe's STA is in the upper third of the region at \$63,150. On the other hand, the PTA and the City of Monroe have median household income figures in the lower third of the region. In fact, at \$31,809, the City of Monroe's median household income is the lowest in the region, and half that of the STA. This discrepancy is due in part to the fact that 19.8% of families in the City of Monroe are below poverty level, compared to 7.9% for Walton County and 10% for Georgia.

Figure 1.10: Regional Median Household Income 2007

Source: Claritas, Inc.



While the City of Monroe shows a slower growth rate and lower income levels than the rest of the region, its downtown does reach a larger, more affluent market. This is evident from the zip code survey which suggests downtown's trade areas extend into higher growth areas, as well as the market segmentation completed for the market analysis. According to Claritas, Inc's PRIZM NE market segmentation analysis, nearly 30% of Downtown Monroe's primary and secondary trade areas market segments are classified as upper-middle class to wealthy. Over half is middle class to wealthy. The market for Downtown Monroe is predominantly younger singles and couples, as well as families. The PRIZM NE segmentation breaks down the counts and percentages of social group and life stage clusters and helps identify customers based on their demographic groupings in order to understand consumer buying characteristics and retail needs.

Retail Market Analysis

The Monroe Town Center study area has a wide variety of retail offerings ranging from furniture, antiques, limited and full service dining, clothing, personal care, and local oriented services such as convenience and auto related business. This existing retail serves a broad customer base as evidenced by the reach of the retail trade areas. The retail market analysis included a demand-side retail leakage analysis, as well as a supply-side retail shares analysis. This market analysis presents opportunities for new or expanded retail and business offerings within the Town Center area.

“Retail Leakage” refers to the difference between the retail expenditures of residents living in a particular area and the sales produced by the stores located in that area. If desired products are not available within an area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be “leaking”. Monroe cannot reasonably expect to capture all sales leaving its trade area, but with strategic recruitment, economic development, and marketing, it could capture between 10% to 20% of dollars leaking the PTA, and between 5% to 10% of that leaking the STA. Based on the leakage study and capture scenario, Monroe could support between 182,624 and 365,249 square feet of additional retail space. This is a tremendous amount of space opportunity based on the demand created in both the primary and secondary trade areas.

Figure 1.11: Capture Scenario for Monroe Town Center

Source: Arnett Muldrow & Associates, Claritas Inc., and ULI's Dollars and Cents of Shopping Centers.

	Potential Capture 20/10	Potential Capture 10/5	Sales per Square Foot	Capture	
				20/10 Calculated Capture	10/5 Calculated Capture
Selected Retail Categories Below	57,843,737	28,921,869		365,249	182,624
Furniture Stores	1,592,481	796,240	141.84	11,227	5,614
Home Furnishing Stores	1,546,704	773,352	167.75	9,220	4,610
Household Appliances Stores	833,537	416,768	245.44	3,396	1,698
Radio, Television, Electronics Stores	2,193,455	1,096,727	207.17	10,588	5,294
Computer and Software Stores	937,498	468,749	207.17	4,525	2,263
Camera and Photographic Equipment	210,183	105,091	542.63	387	194
Building Material and Supply Dealers	5,419,104	2,709,552	142.38	38,061	19,030
Hardware Stores	691,387	345,694	121.08	5,710	2,855
Grocery Stores	0	0	371.79	0	0
Health and Personal Care Stores	2,956,787	1,478,394	247.29	11,957	5,978
Clothing and Clothing Accessories	9,813,928	4,906,964	164.60	59,623	29,811
Women's Accessory & Specialty	1,933,227	966,614	164.60	11,745	5,873
Shoe Stores	1,179,205	589,602	158.81	7,425	3,713
Jewelry Stores	1,135,224	567,612	263.92	4,301	2,151
Luggage and Leather Goods Stores	117,447	58,724	198.82	591	295
Sporting Goods Stores	982,744	491,372	153.46	6,404	3,202
Hobby, Toys and Games Stores	831,885	415,942	146.28	5,687	2,843
Sew/Needlework/Piece Goods Stores	200,651	100,325	74.91	2,679	1,339
Book Stores	600,250	300,125	161.16	3,725	1,862
General Merchandise Stores	15,522,394	7,761,197	133.90	115,925	57,963
Florists	332,829	166,414	149.82	2,222	1,111
Gift, Novelty and Souvenir Stores	850,762	425,381	168.55	5,048	2,524
Foodservice and Drinking Places	7,130,966	3,565,483	201.63	35,367	17,683
Drinking Places -Alcoholic Beverages	831,091	415,546	88.07	9,437	4,718

Monroe's primary opportunities lie within recruiting these business types:

- "Home" related businesses such as furniture, home furnishing & hardware. These categories show potential in both the leakage and shares studies, and would target the growing housing market in Monroe's local trade areas.
- There is tremendous potential for apparel, but most specifically women's and family clothing.
- The shares study shows that Monroe has become a regional attraction for antiques sales. Considering the number and quality of Monroe's existing establishments, there is an opportunity to build off of this cluster and promote it to a larger region.
- There is a huge opportunity for full service restaurant space similar to Twisted Oak and Bella Cucina. Restaurants are typically on the leading edge of downtown revitalization, and they have the potential to reach the broadest market of locals, regional residents, and visitors.
- Specialty retail categories such as sporting goods, jewelry, gifts, books, and hobby & craft stores all show potential, and their recruitment could help position Monroe Town Center as a regional destination.
- Specialty foods such as meat, fruits & vegetables, as well as a wine shop show potential, and would be desired by the segments of the market that would live in a mixed-use, downtown environment.

Housing Market Analysis

The housing market analysis projects demand for new housing units, price points, and housing types over the next ten years within Walton County and the primary trade area. Currently, the City of Monroe has a median occupied housing unit value of \$110,810, compared to \$153,000 for Walton County, \$143,000 for the PTA, and \$169,000 for the STA. While the City has the lowest regional unit value, the market that Monroe Town Center reaches supports a more affluent homeowner. The current Georgia MLS indicates that there are 1479 listings on the market with an average price point of \$269,385. In the past twelve months, 1371 units have sold in Walton County for an average sales price of \$202,490. There are currently 577 new units for sale in Walton. Sixty-five percent of these units are between \$100,000 to \$300,000 while another 31% are greater than \$300,000.



Home related businesses can be accommodated in an urban framework



New establishments should create interest and vitality along the street



New housing types will need to be reflective of a range of price points

Projected demand shows very similar trends for the primary trade area (PTA), covering the majority of Walton County. Currently within the PTA, 69% of housing units are owner occupied, 26% are rental properties, and 5% are vacant. Ten-year projections show an annual demand in the PTA of 898 occupied units (658 owner and 240 renter).

Of the 658 owner occupied units, 38% of the annual demand will be for price points between \$150,000 and \$200,000, while another 47% will be for units between \$200,000 and \$400,000.

Projections for occupied housing unit type shows the vast majority of the annual demand in the PTA will be for single-family detached units (685) and mobile homes (96). There will be a demand of 12 units per year in the form of town homes or condos. The remainder of demand includes 56 duplex units, and 48 apartment units. The current median monthly rent for rental units is \$397.

Estimates and projections for the LCI Study Area suggest that it could support a total of 450 housing units over the next ten years. This estimate is based on a 5% capture of the ten-year demand in the PTA. While the majority of the study area is currently developed, redevelopment of Monroe Town Center as recommended in this master plan could accommodate new housing units in the form of infill development, redeveloped mill buildings, and new investment that has a mixture of units.

Figure 1.12: Current Walton County Housing Market

Source: Georgia MLS

Pricepoint	New Construction	Total Units	Percent
Homes			
<100	1	58	4%
100-200	147	555	37%
200-300	234	417	28%
300-400	143	277	18%
400-500	36	94	6%
500-750	13	73	5%
750 +	3	24	2%
Total		1498	100%
Condo/Townhome			
100-200	6	15	94%
200-300	0	1	6%
Total		16	100%
Residential Rental			
<1k	0	3	23%
1k-2k	0	9	69%
>2k	0	1	8%

Figure 1.13: Housing Projects for Primary Trade Area

Source: Arnett Muldrow & Associates. US Census. ESRI

Housing Units	2017 Projection	2017 Percent	Change 2007-2017	Total Annual Estimated Demand
Occupied	27,034	96.5%	8,976	898
Owner	19,674	70.2%	6,576	658
Renter	7,360	26.3%	2,400	240
Vacant	994	3.5%	-22	-2
Total	28,028	100%	8,954	895

Figure 1.14: Housing Demand by Unity Type

Source: ESRI. US Census. Arnett Muldrow & Associates

Occupied Units In Structure		2007	2012	2017	Total Annual Estimated Demand
Single Family	Detached	13,775	17,199	20,623	685
	Attached	245	305	366	12
	Mobile Home	1,926	2,405	2,884	96
Duplex	2	1,137	1,419	1,702	56
Multifamily	3 to 4	452	565	677	22
	5 to 9	392	490	587	19
	10 to 19	52	65	78	3
	20 to 49	51	63	76	3
	50 or More	29	36	43	1
		18058	22546	27034	898

Market Characteristics

The following represents a quick list of the overall strengths and weaknesses of Monroe and the LCI study area as it relates to the characteristics of the market.

Strengths

- Monroe is the center of government, employment, and retail for all of Walton County.
- There has been a significant amount of recent investment in retail businesses in Downtown Monroe. Many of the existing businesses have started up in the past year or two.
- Due to variety of retail, restaurants, employment uses, and governmental entities, Monroe has a very active downtown environment.
- Monroe reaches a broad trade area including all of Walton County and adjacent areas. Within its primary and secondary trade areas, there has been continued residential development and growth. These trends are projected to continue.
- Monroe lies just outside of the greater Atlanta metro area, and therefore has great access to Gwinnett County and East Atlanta. It benefits from Atlanta's growth without compromising its own character.

Weaknesses

- The City of Monroe has slower population growth relative to the region. Similarly, its per capita income, household income, and housing unit values are some of the lowest in the area
- There is a poverty rate of nearly 20% in the City of Monroe.
- Monroe is somewhat regionally isolated in terms of access. It lies twenty-five miles to the south of the I-85 corridor, and 15 miles north of the I-20 corridor.
- Due to its location in the center of Walton County and the lack of a bypass or truck route, there seems to be a significant amount of truck traffic passing through Downtown Monroe.

Opportunities

- Many of the market opportunities identified in this plan can be accommodated in the redevelopment of the two mills and various under-utilized industrial buildings with the Monroe Town Center.
- The redevelopment master plan created prior to this planning process outlined opportunities for the development of affordable housing units in the study area.
- Based off of Monroe's market reach and regional growth, there is a tremendous amount of demand for additional retail, restaurants, businesses, and services.
- Monroe has the potential to position itself as the "home center" for the growing residential market with its cluster of "home" related uses such as fine furniture, home furnishings, antiques, and gallery space.

Challenges

- Monroe has strong regional competitive markets including Loganville/Gwinnett County (retail/residential concentration), Athens (regional attractor), and Madison (small town competitor).
- Bringing investment in and building partnerships to realize the opportunities and visions of this master plan.

1.6 Public Facilities

Public facilities are the foundations upon which communities are built. They support growth by providing essential facilities and services such as water, sewer, electricity, and gas. Effective systems are essential to a community's health.

Existing Conditions

As the county seat for Walton County, Monroe in general, and the Study Area in particular, contain a wide variety of public services. Many of these are within or near the Study Area.

Although not located inside of it, the Study Area has several schools nearby, including: Monroe Elementary School, Montessori School of Monroe, Carver Walton County Crossroads School, Monroe Primary School, Athens Technical College, Walton County Alternative School, and Walton County Creative Learning.

Fire and police protection are excellent within the Study Area. The Monroe Fire Department is located just east of Broad Street and south of Spring Street in a convenient downtown location. Nearby, a police station is located downtown on Broad Street.

The Monroe-Walton County Library is located on West Spring Street and serves the entire Walton County area. The library is a unit of the Uncle Remus Regional Library System. Its presence in the downtown serves to draw people from throughout the area to Monroe's historic core.

Strengths

- Police and fire stations, which are within the Study Area
- Church Street Community Building
- City Hall, the library and Post Office, which draw people to the downtown

Weaknesses

- Lack of a public swimming pool
- The design of library, which is focused on the automobile
- The loss of intown schools to outlying locations

Opportunities

- Old school property, which could be renovated to allow new community-supported uses (see next page)

Threats

- The loss of existing facilities to outlying areas



The recently closed and relocated Monroe Elementary School



Fire Department located downtown



The Monroe - Walton County Library

Citizen Leadership and Visioning

The Monroe Arts and History Alliance (MAHA) was formed by a group of citizens in Monroe, Georgia, charging itself with preserving the historic structures on an abandoned school site and reusing the property to promote the public good. Their tentative plans are to preserve and convert the following:

- Denton Hall (also known as the Old Rock Gym) was built in 1933 by the students of Monroe High School, hauling rock from Stone Mountain. Denton Hall has since fallen into disrepair and is currently employed as a storage facility for the Board of Education. The conversion is thought to be ideal for a theatre, creating a large county wide venue for plays, concerts, seminars, conferences, and other community gathering purposes.
- Memorial Library, built to honor those killed in World War II, was originally dedicated as an annex to the Monroe High School. The restoration and conversion is visualized into a Walton County Museum with a special focus on war veterans to actively engage students, citizens, and visitors to foster Walton County's rich culture and history.
- Back Yard / Playground conversion into an amphitheater or family park as a central outdoor venue and community common that can be used for entertainment purposes. The grounds around the theater would be planned to include paths, perennial shade gardens and other landscaped areas. As well, the playground would be preserved as a space for neighborhood children and children attending performances.
- Kitchen and Cafeteria conversion into a commercial Co-Op kitchen to rent out to food entrepreneurs, cooking classes, and community cooking event fund raisers.
- Main School Building conversion into a rental space to generate revenue such as artist studio space, Co-Op craft space, special meetings or events, storage space, and space for music lessons. Long-term this space could also be targeted for a magnet school or academy.



Denton Hall, built by students with rock from Stone Mountain



Front entrance to Memorial Library



The bowl-shaped grounds, grassed for recreation and playground

1.7 Environment & Open Space

Environment

An understanding of the interplay between human and natural features is essential to planning for the future. Natural features can define if and how land should be developed, while human activities can have had a profound impact on the environment.

Existing Conditions

The Study Area largely consists of rolling hills, with SR 11 following a slight ridge line and bisecting Downtown Monroe as it runs north to south. Spring Street begins its high point at the intersection with Broad Street downtown, and from there Spring Street gently falls in elevation as it runs perpendicular east and west from Broad Street. Most land in the Study Area appears either relatively flat or gentle, rolling terrain with only a few pockets of steep terrain.

There are several water bodies in the Study Area, including two wetlands (one in the north and one in the south) and three creeks (two in the north and one in the south). The largest body of water nearby is located just to the west of the Study Area across Alcovy Street. The northern portion of the Study Area contains two creeks: the western most beginning near Marable Street and continuing southwest across Highland and Spring Streets; the easternmost beginning around Madison Street and continuing southeast across Spring Street and further east. In the southern portion of the Study Area, a creek runs through the Avondale Mill site, crossing Barrett Street and leading to a small pond in front of the mill. It is important to note that there is a new required stream buffer area of 50 feet measured from the top of the stream bank for any structures, as adopted in a recent county ordinance the previous year.

According to state and federal agencies, there are no known contaminated sites in the Study Area. The county landfill is the only such reported site in the Walton County and well outside of the Study Area.

Strengths

- Extensive neighborhood tree cover, which provides shade
- Gentle topography
- Existing wetlands, which serve to control flooding and provide animal and plant habitat
- Lack of known site contamination within the Study Area



Gently sloping terrain characterizes much of the Study Area



Vegetation covered stream crossing Walker Drive and into the Avondale Mill property



A retaining pond in front of Avondale Mill could become an open space with redevelopment

Weakness

- High degree of surface parking at the fringes of downtown, which can contribute to summer heating and which limit water infiltration
- Lack of trees on many streets, which increases summertime heating and discourages walking

Opportunities

- Stream buffers, which serve as corridors for animal and plant habitat and make good greenway trail locations

Threats

- Gas stations, former dry cleaners, and auto yards, which could potentially be contaminated

Open Space

Reliance on technology and fast-paced lifestyles often lead people to increasingly value places that allow them to connect with others. In fact, one of today's hottest real estate trends is the community where people can partake in a wide variety of public spaces on a daily basis. Many people no longer want to drive long distances to walk down a pleasant, tree-lined sidewalk, play in a park with their children, or relax on a warm summer evening. They now want their communities to provide all of these opportunities and more.

There are five major categories of public spaces, each with their own distinct definition and applicability:

Streets and sidewalks are the most often used public spaces in towns and cities. In addition to serving as a transportation conduit, streets and sidewalks can be designed to encourage human interaction and community building. Streets can serve as parade routes or the location of special festivals, while in-town sidewalks can provide room for cafe dining, street furniture, and street trees.

Plazas are hardscaped gathering spaces located in a town or city center and surrounded by commercial, mixed-use, or civic buildings. Plazas often include fountains, benches, and similar elements. Their entire surface is accessible to the public and consists of stone, concrete, or durable pavement interspersed with trees and limited plant materials.

Parks are landscaped recreation and gathering places that can be located in any area of a town or city. They may be surrounded by residential or commercial buildings, and are often the focal points



Spring Street lacks street trees east of downtown



Sidewalks should be inviting and interesting to pedestrians, encouraging commerce and activity



This central plaza space in Atlanta's Glenwood Park serves as an amenity to the entire community

of neighborhoods. Parks often include picnic facilities, drinking fountains, benches, and playgrounds. Larger parks may include ponds, sports fields, and courts. Well designed parks are defined at the edges by streets. Their accessible landscape consists of paths, trees, lawns, shrubs, and other plant materials.

Greenways are linear parks that can serve as corridors for transportation, wildlife migration, or protection of key habitats that occur in a linear manner, such as the riparian zones along creeks and rivers. Greenways can also connect plazas, parks and conservation lands. Because of this, they can be located in virtually any setting with varying sizes.

Conservation Lands protect and enhance areas of environmental and historic significance. They are usually located at the edge of a village, town or city. Because their primary purpose is the protection of open space, they can include camping sites and trails.

Existing Conditions

There are few public open spaces within the Study Area. The most notable ones include the approximately 12 acre Rest Haven Cemetery, the 1.6 acre Pilot Park, the 3.1 acre cemetery on Nowell Street, and a 4.9 acre City-owned green space on Colquitt Street. Other open spaces include the roughly 0.5 acre old courthouse square and a 0.3 acre sculpture park on Broad Street.

Within the downtown core, the existing wide sidewalks along Broad Street also serve as a public space. In the shaded blocks between Highland Avenue and Spring Street this public space is used for outdoor dining and shop display.

Strengths

- Rest Haven Cemetery, which is a key open space and landmark
- The cemetery on Street
- The courthouse square, which is a community focal point
- Pilot Park, which is a model neighborhood open space
- The Monroe Art Guild sculpture park
- Wide sidewalks on portions of Broad Street

Weaknesses

- Few neighborhood parks, which forces some residents to drive if they want to use park space
- Lack of community gardens, which some have expressed a desire for



Not all open spaces, such as this cul-de-sac, are usable public spaces



A park is the center of Harbor Town, near Memphis (Courtesy of Alex S. MacLean)



This pocket park next to the Monroe Art Guild houses sculpture and provides a quiet green spot on Broad Street

- Lack of large public assembly spots for performances
- Poorly used private open spaces, which fail to capitalize on their potential use

Opportunities

- Pocket parks, which could be included in the redevelopment of marginal commercial uses in the Study Area
- A greenway network, which could connect existing parks along rail and stream corridors
- Keeping “eyes on the park” with development that faces the public realm
- The parcel northeast of the old depot, at the southwest corner of Church Street and Madison Avenue
- The redevelopment of Avondale Mills, which could include park space
- Former school sites, which house de-fact open spaces
- The alley between Wayne and Broad Streets, which could be transformed into a pleasant passageway

Threats

- Development, which could occur without appropriate open spaces
- Poorly designed open spaces, which could limit their use and fail to capitalize on the need for a community focal point
- Poorly located open spaces, which could result when they are relegated to the sites with least development potential

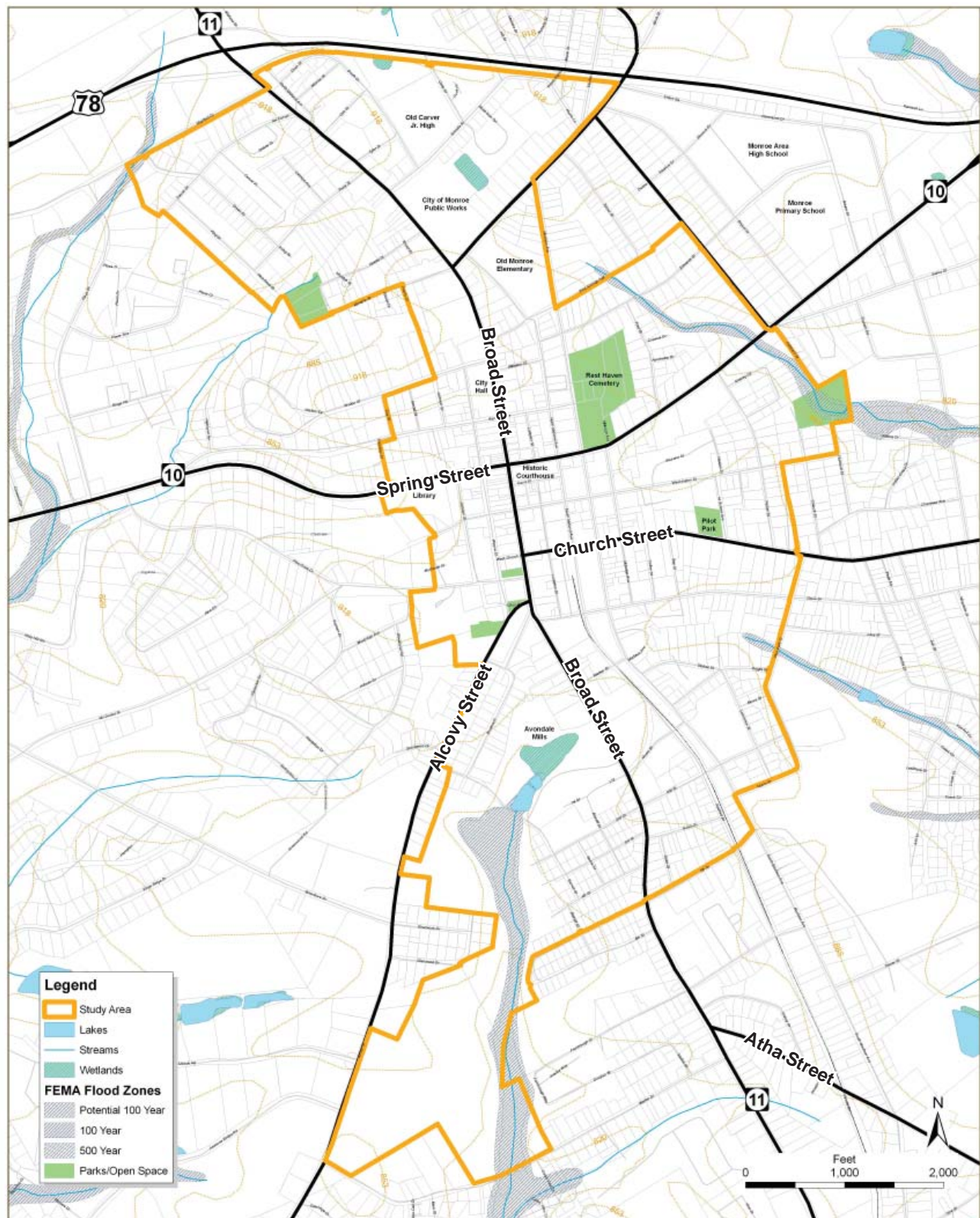


This private open space is under-utilized



With proper lighting and landscaping, alleys between buildings can become amenities

Figure 1.15: Existing Natural Features





Town Center LCI
Section 2:
Visioning

January 2008

This page is intentionally left blank

Table of Contents

2.1 Public Process..... 2:1

2.2 Goals & Objectives 2:6

2.3 Vision..... 2:7

This page is intentionally left blank

2.1 Public Process

The public participation process for the Monroe Town Center LCI study used a variety of tools. These included stakeholder interviews, a public workshop, multiple public presentations and feedback sessions, Steering Committee meetings, and a project website occurring from June 2008 through January 2008.

Steering Committee Meetings

A Steering Committee was identified early in the planning process to serve as a representative of the larger community, to communicate the plan's vision, and to guide the process. Members included City of Monroe officials, Walton County officials, business owners, non-profit groups, neighborhood leaders, and landowners. The first Steering Committee meeting was July 5, 2007, with additional meetings on August 23, 2007, and September 13, 2007. These meetings were used to gain input into strengths and weaknesses of the Study Area, to propose opportunities and identify threats, to promote community outreach, and to refine the vision of the study.

Stakeholder Interviews

Twenty-eight confidential interviews of steering committee members and others were conducted to understand existing conditions of the Study Area, obtain a general idea of trends, and to solidify preliminary ideas for improving Monroe. Three interview methods were offered: in-person, over the phone, or by e-mail. A summary of interview results can be found in the Appendix.

Public Meetings

Public meetings were held throughout the planning process to provide the full community with an opportunity to inform the planning process. Meetings included:

- Kick-Off Meeting: July 19, 2007
- Public Workshop: August 16, 2007
- Preliminary Recommendations: September 17, 2007
- Draft Plan Presentation: November 13, 2008
- Final Plan Presentation: January 8, 2008

The public was made aware of these meetings via e-mails, meeting flyers, newspaper articles, and, in the case of the workshop, a larger banner that hung on North Broad street for a week prior to the event. Please see the Appendix for sign-in sheets and agendas.



The first Steering Committee meeting helped establish existing challenges in the Study Area



Discussion at the first Public Meeting gives the public a chance to visualize and rank potential future outcomes



Participants highly favored this image of new residential development occurring in Woodstock, Georgia

Visual Preference Survey

A key tool of the planning process was a Visual Preference Survey (VPS). The survey was given at the July Kick-Off Meeting and offered on the project website through December for others to take. The majority of responses were via the former method.

Survey participants were asked to review a variety of images for their appropriateness for the future of the Monroe Town Center LCI Study Area and to put green dots (or checks, in the case of the on-line survey) by those that were most appropriate and red dots (or Xs) by those that were least appropriate. The survey measured the attitudes and preferences of participants towards design issues and community priorities. Its results provided guidance to the study, especially during the process of envisioning future land use and transportation projects. The survey included seven categories: Single Family Residential, Multifamily Residential, Townhouses, Mixed-Use, Commercial, Streets, and Open Spaces.

Survey Analysis

Just before the Community Workshop, the number of red and green dots (and on-line responses to-date) were summed to determine which images were most and least appropriate for Monroe's future. These images were then reviewed with the public at the workshop. During this review, consultants presented each image and speculated which aspects the community liked or disliked. The public then provided additional feedback.

Most of the images selected as appropriate showed places with a blend of history, character, and permanence. The most popular images were of human-scaled buildings, vibrant and public spaces, small parks, rehabilitated retail buildings, tree-lined sidewalks, and streets that were pedestrian-friendly and framed with buildings. This suggested a community desire to protect its historic and pedestrian-friendly downtown, while developing new areas in a similar way.

Another image deemed appropriate was the image of a bypass or truck route. As indicated in Section 1 of this report, a route to remove trucks from Broad Street is desired by many.

Images deemed inappropriate often lacked local identity or were very dense. Strip development along US 78 in nearby Loganville ranked poorly, as did buildings higher than five stories. Other inappropriate images showed truck traffic on Broad Street, dilapidated homes, and commercial strip development already in the corridor.



These live/work units in Kentlands, Maryland, were the favorite townhouses



Participants highly favored this image of a bypass or truck route for its ability to remove trucks from Broad Street



This adaptive re-use mill in Atlanta was the favorite Multifamily image

Community Workshop

The primary method of public input into the planning process was a Community Workshop held on Thursday, August 16, 2007 at the Church Street Community Building. The workshop began with an introduction and welcome followed by an overview of inventory work on land use, historic resources, markets and demographics, and transportation. Following this, the results from the VPS were discussed before breaking up into small work groups.

These work groups allowed participants to express shared ideas for improving the Study Area with the consultant team and each other. Breakout tables included:

- A Study-Area wide table focussed on transportation and land-use for the entire corridor;
- A North Sector table focussed on transportation and land use from US 78 to downtown;
- A Downtown table focussed on transportation and land in the historic heart of Monroe;
- A South Sector table focussed on transportation and land use from downtown to Avondale Mills;
- A Markets and Economics table focussed on retail and economic development concerns; and
- A Transportation table focussed on discussing detailed ideas for improving transportation systems.

Participants were allowed to spend the entire breakout session at one table or move from table to table.

After the breakout sessions, everyone regrouped and a community member present each table's ideas. Afterwards, the next steps were outlined and future meetings dates were announced before adjourning the meeting. Figure 2.1 provides a summary of the land use and transportation vision resulting from the workshop.

Project Website

Another public involvement tool was a project website. The website included: meeting announcements and materials; newspaper coverage; workshop results; an e-mail list serve; study maps, study documents, the VPS; and an option for feedback. The project website was located at:

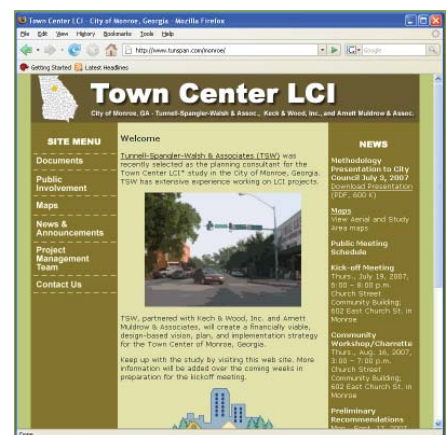
<http://www.tunspan.com/monroe/>



Groups addressed transportation issues and areas of future improvement at the Community Workshop

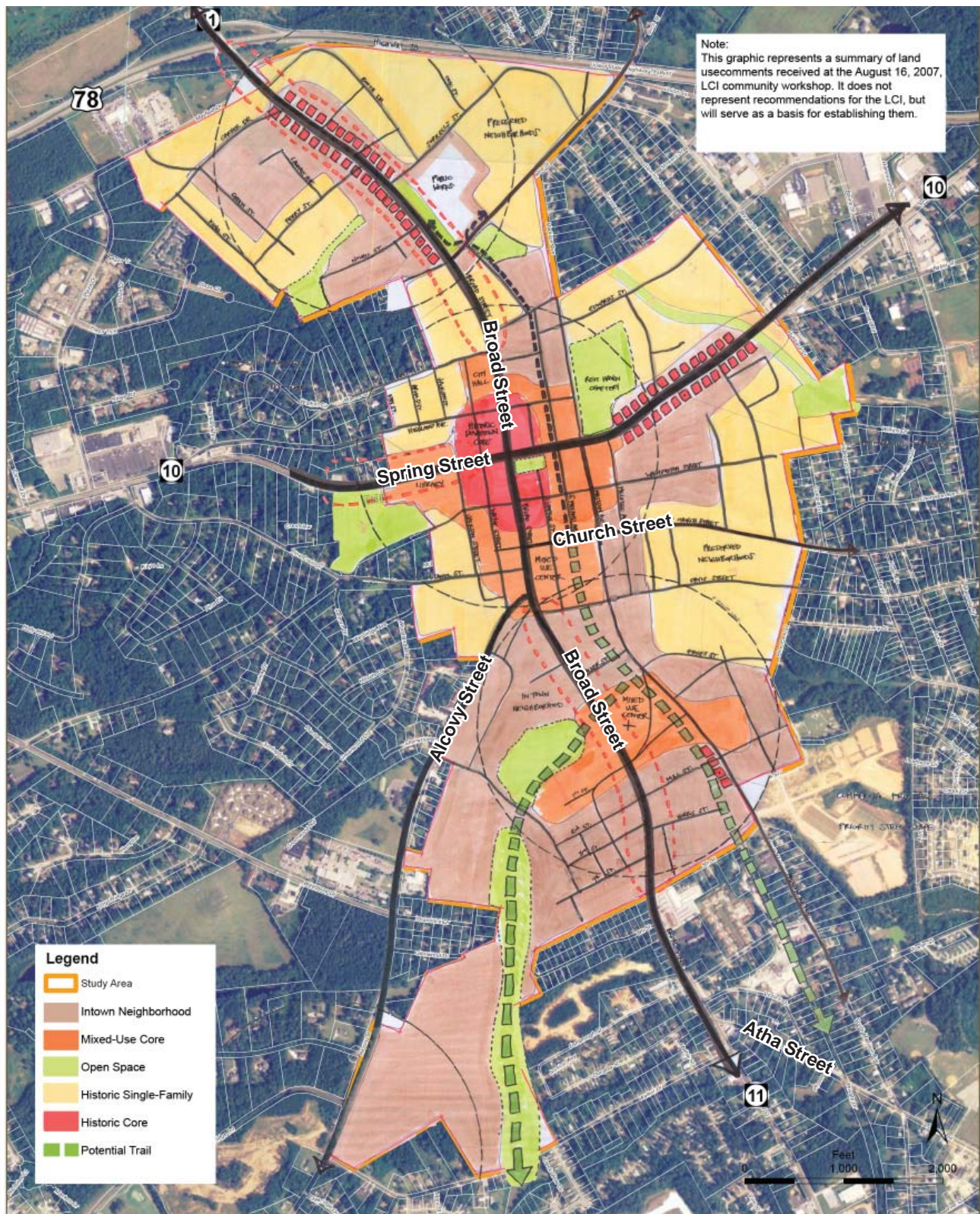


Groups also discussed possible future land uses at the workshop



The project website gave the public access to maps, presentations, news, and other documents throughout the process

Figure 2.1: Workshop Summary Concept



2.2 Goals & Objectives

The consultant team worked with area stakeholders to develop goals and objectives for the Study Area. These goals were also discussed and revised by Community Workshop participants. They complement the ten goals established by the ARC as a base for any LCI study that were addressed earlier in this report (Section 1.1).

Additional goals for this Study include:

Goal 11: *Improve pedestrian safety and access throughout the Study Area.*

Goal 12: *Provide a well-balanced retail and residential parking program.*

Goal 13: *Reduce the negative impacts of truck traffic on Downtown Monroe.*

Goal 14: *Provide adequate infrastructure to support future development.*

Goals 15: *Enhance parks, open spaces, and community facilities.*

Goal 16: *Preserve and enhance Monroe's identity and historic character.*

Goal 17: *Utilize Monroe's history and sense-of-place as a marketing strategy.*

Goal 18: *Support employment growth in the downtown area.*

Goal 19: *Improve the character of major streets leading into Downtown Monroe.*

Goal 20: *Ensure that zoning supports the community's vision.*



A community goal of this study was to identify ways to reduce the impacts of truck traffic on Broad Street



The preservation of Monroe's local identity was a key goal of this study

2.3 Vision

Monroe is a city rich in history and sense-of-place. With its historic tree-lined neighborhood streets, working downtown full of locally-owned businesses, and strong community bonds, Monroe is blessed to still have the small town flavor that so many communities across Georgia have lost. In the face of coming growth, it is this local identity that should also be basis for Monroe's future.

The vision for the Monroe Town Center LCI is to strengthen and build upon the community's historic pedestrian-oriented town patterns while extending their character to new growth areas. This will not only provide a sustainable, human-scaled framework to organize growth, but it will also do so in a way that does not obliterate Monroe's past in the process.

Central to this vision is a vibrant Broad Street corridor featuring restored and new buildings filled with unique shops, restaurants, offices, and above-shop lofts within the existing downtown and two new neighborhood serving center at US 78 and near Avondale Mills. Surrounding downtown and these centers, new housing options will be introduced to Monroe, including small lot single-family houses, townhouses, and even multifamily housing. These will be compatible with Monroe's historic architecture and will provide increased choice for existing and new residents. With the addition of this housing and employment, many residents will be able to live within walking distance daily needs.

Open spaces and community facilities will complete Monroe's offerings. Existing parks will be improved, while new pocket parks and gardens located in new developments will be provided to refresh body and spirit. Community facility enhancements will strengthen community bonds, while old civic buildings will be put to new uses.

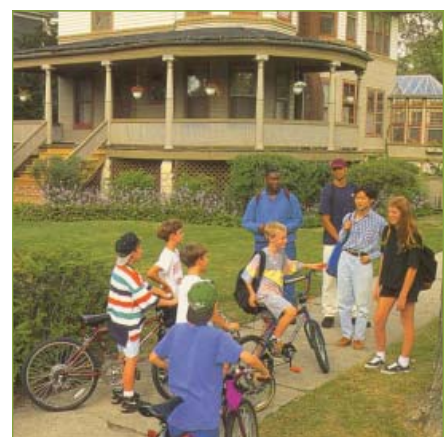
Tying together this framework of historic and new walkable centers, parks, and facilities will be a balanced transportation system of sidewalks, multi-use trails, and more efficient traffic operations. This will improve the visual character of major streets into Monroe, reduce the negative impacts of truck traffic, and improve safety and access for pedestrians and drivers. It will also make sure that traffic passing through Monroe does so on the community's terms. With these changes, families will be able to safely walk from outlying neighborhoods into downtown, while new residents of downtown's lofts and townhouses will have access to nearby parks. This will reduce gasoline consumption, improve public health, and ensure that the human interaction that glues together Monroe's small town character is preserved well into the future.



The vision for Monroe offers a delightful pedestrian experience that attracts locals and visitors



New buildings will be compatible with local architecture and scale



New sidewalks will provide children with increased independence



Town Center LCI
Section 3:

Recommendations

January 2008

This page is intentionally left blank

Table of Contents

3.1 Overview 3:1

3.2 Land Use & Zoning Recommendations 3:3

3.3 Community Pattern Recommendations 3:11

3.4 Transportation Recommendations 3:14

3.5 Demographic & Market Recommendations 3:20

3.6 Public Facility Recommendations 3:23

3.7 Environment & Open Space Recommendations 3:24

This page is intentionally left blank

3.1 Overview

This section includes recommendations for the Study Area. These recommendations define its future character and provide short and long-range actions to improve the challenges identified during the planning process. They also support the Goals and Objectives identified in Section 2: Visioning.

Recommendations are a synthesis of the desires of residents, businesses, property owners, the City of Monroe, and other stakeholders, coupled with sound planning. They offer a visionary yet achievable blueprint for change that reflects the Monroe's historic, environmental conditions, development potential, transportation needs, and regulatory framework. To this end, they enhance the transportation and land use relationship by:

- Directing growth into areas with current infrastructure.
- Establishing pedestrian-oriented mixed-use centers that build on historic land-use patterns and support walking.
- Encouraging redevelopment of marginal land uses near existing population and business centers.
- Connecting existing and new centers with multi-modal transportation enhancements, including new sidewalks, multi-use trails, bike lanes, and vehicular upgrades.
- Utilizing open spaces and tree-lined streets to link destinations and improve recreational options.

With time, these recommendations will guide growth along Broad Street in a way that respects Monroe's history and achieves: walkable mixed-use centers; wide, tree-lined sidewalks; preserved historic resources; compatible new development; and a balanced transportation system. An overview of the recommendations can be found in the Framework Plan shown in Figure 3.1. Said plan is a refinement of the Workshop Summary Concept (Figure 2.1) based on sound transportation, land use, urban design, and market analysis. As such, it is intended to graphically illustrate the relationship between all recommendations, but particularly transportation and land use.

Recommendations are organized into six categories: Land Use & Zoning, Community Patterns, Transportation, Demographics & Markets, Public Facilities, and Environment & Open Space.

There are two types of recommendations provided: Policies and Projects. Projects are followed by a project number as identified in Section 4: Action Plan, which contains an implementation strategy, including cost, funding and responsible parties.

Policies & Projects

There are two types of recommendations provided in this study:

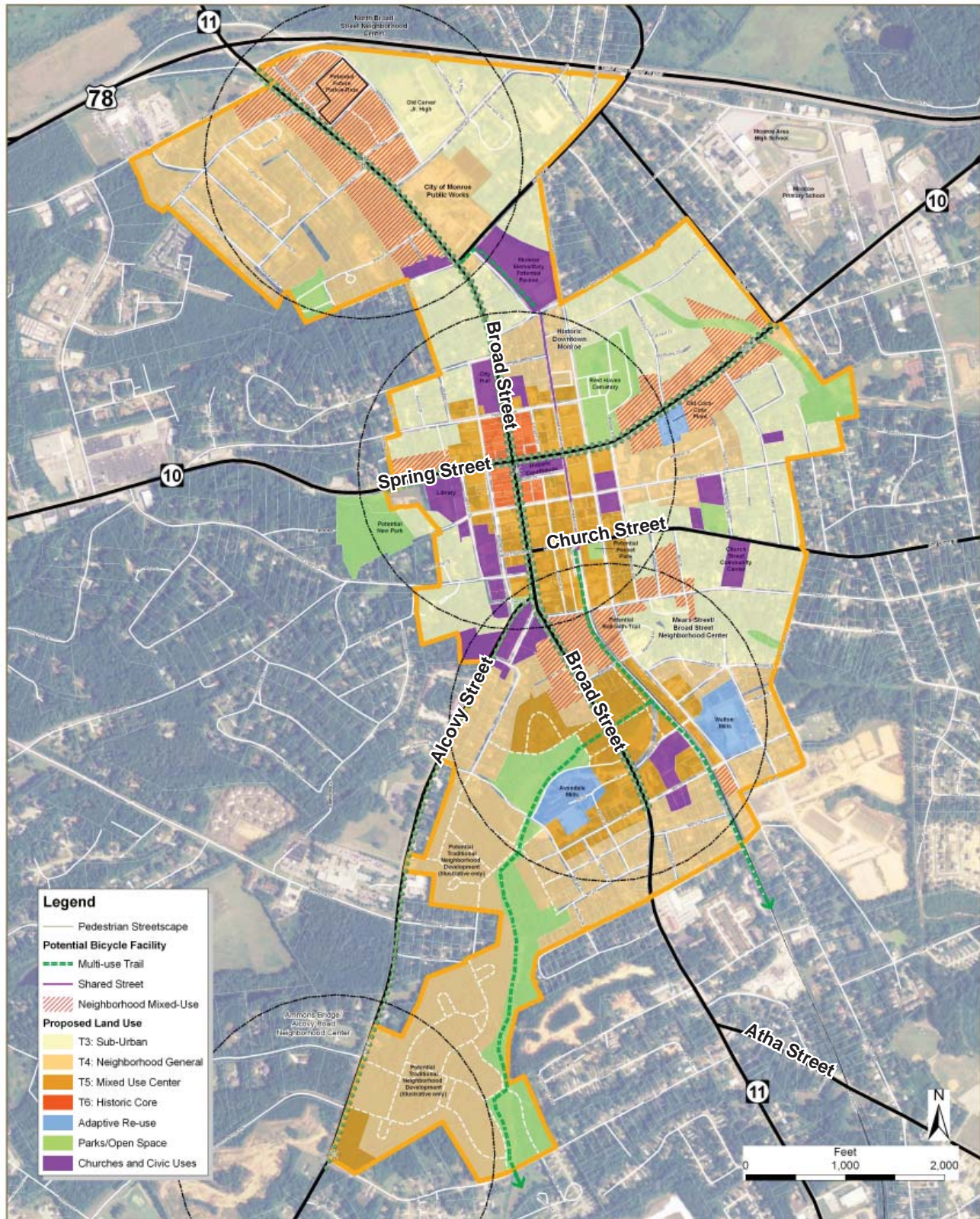
Policies are guidelines that provide direction to the implementation of the LCI's vision. They often support projects and should be the basis for actions by LCI sponsors.

Projects are specific tasks, such as transportation improvements, studies, or signage, with a defined cost and time frame.



Projects can be public, such as new sidewalks (top) or private, such as redevelopment (bottom)

Figure 3.1: Framework Plan



3.2 Land Use & Zoning Recommendations

Guiding Land Use & Zoning Principles

It is necessary to preserve the historic small town character of Monroe and facilitate appropriate development and redevelopment around it. The guiding principles were generated from extensive community feedback and the public participation process. They should be followed to ensure responsible growth for the future of the community.

The guiding principles for the land use and zoning recommendations are to:

- Strengthen downtown.
- Ensure appropriate transition from the core to neighborhoods.
- Preserve existing neighborhoods.
- Establish town or neighborhood centers at:
 - North Broad Street
 - Downtown
 - Mears Street at Broad Street
 - Ammons Bridge Road at Alcovy Street.

Land Use & Zoning Policies

- Preserve the historic integrity of the downtown core, especially the blocks along Broad Street between Highland Avenue and Washington Street.
- Preserve, protect, and encourage the rehabilitation of historic buildings (those over 50 years old).
- Encourage sidewalk level retail in new buildings on: Broad Street (between Highland Avenue and Davis Street), Spring Street, and North Broad Street.
- Protect neighborhoods from commercial and multifamily intrusion.
- Encourage two-to-four story commercial, residential, and mixed-use buildings on vacant or under-utilized non-historic sites in area bounded by Highland Avenue, Midland Avenue, Davis Street, and Jackson Street.
- Support the development of two-to-three story commercial, residential, or mixed-use buildings on vacant or under-utilized non-historic sites on Spring Street east of Midland



Preservation of the downtown core is crucial to keeping the small town character of Monroe



Transitioning new development to existing neighborhoods is important to the community



Historic buildings must be preserved and protected

Avenue.

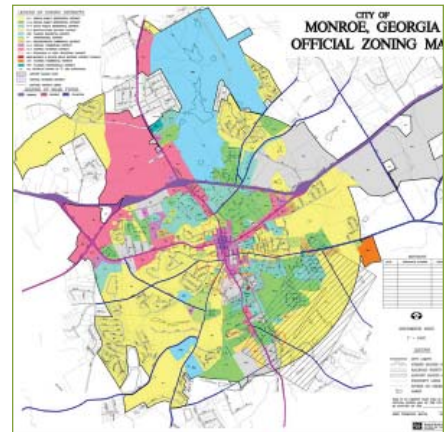
- Support the renovation of the Coca-Cola building on Spring Street into office, retail, or light industrial space, with potential mixed-use or residential buildings around it.
- Support existing efforts to enforce zoning and building codes.

Land Use and Zoning Projects

- Amend the Future Land Use Plan to reflect the plan’s vision. (O-30)
- Update the zoning code to reflect the plan’s visions. (O-31)
Changes should include, among other things, creating a new district for the LCI area that:
 - *Provides design standards for new development.*
 - *Requires new developments to include sidewalks.*
 - *Reduces parking requirements for above-shop homes.*
 - *Provides increased incentives for housing in the downtown core.*
 - *Establishes improved signage standards.*
 - *Ensures adequate transition to existing neighborhoods and historic buildings.*
- Develop Avondale Mill and Walton Mills into a traditional neighborhood development. (O-28)
Please see the Mills of Monroe Concept Plan on page 3.5.
- Redevelop North Broad Street into a mixed-use neighborhood-serving center. (O-26)
Please see North Gateway Concept Plan on page 3:6 for one option for private-sector redevelopment.



In Atlanta buildings similar to the old Coca-Cola plant have been converted to loft retail and office use



The zoning code must be amended for the plan’s vision to become a reality

Mills of Monroe Concept Plan

The Mills of Monroe are located just south of downtown between Broad Street and Alcovy Street. Due to their large parcel size and historic significance, they have great potential for being creatively reused and adapted to help meet future growth needs of Monroe. The developer-provided concept plan below envisions the Mills of Monroe as a mixed-use traditional neighborhood development which includes single-family houses, townhouses, live/work units, offices, and commercial.

Both historic mill buildings could include many different uses, such as incubator office or light industrial space, retail, or housing. It is also recommended that the redevelopment establish improved signage standards and ensure adequate transition to existing neighborhoods and historic buildings.

The developer's tentative plans envisions a total of over 100,000 square feet of new retail space and 36,000 square feet of new office space. If the mill buildings were reused primarily as office space, the Walton Mill could accommodate around 500,000 square feet of office space and the Monroe Mill an estimated 175,000 square feet of office space. In addition, there is a potential for 487 new housing units in a range of types including single-family houses, cottage houses, live/work units, and townhouses.



The current vision for the Mills of Monroe illustrates the potential for a mix of uses surrounding the historic mill buildings

North Gateway Concept Plan

The North Gateway Concept Plan arises from the community's desires to create a welcoming entrance to Monroe for drivers coming to town from US 78, at the Study Area's northern edge. The plan shows one option for the private redevelopment of existing properties into a mixed-use center focused around the intersections of Perry and Tyler Streets with North Broad Street.

Along North Broad Street the concept plan calls for several new 60 to 80 feet deep pedestrian-friendly commercial buildings. These should directly front the sidewalk near Perry Street, then pull back to provide a ten foot landscaped front yard in other areas. Parking should be provided to the rear to minimize its impacts on aesthetics and the pedestrian. Tenants of these building types are likely to include the retail and restaurant formats often found along the roads leading into towns. Just north of Nowell Street, a 30,000 to 40,000 sf grocery store is envisioned with parking that is screened from the by the aforementioned buildings. On the east side of the street, at Tyler Street, a pedestrian friendly gas station/convenience store is provided that features pumps to the side of the building rather than directly in front of it.

Residential uses are also provided in the concept plan. Because most buildings along North Broad Street should have a sidewalk-oriented storefront character, live/work units are proposed as a transition between commercial or mixed-use buildings and neighborhood. Multifamily units could be provided above commercial uses, while in other areas, townhouses are envisioned with rear parking and private mid-block green spaces called "rambles."

Public space improvements are also shown in the plan. An offset intersection at Perry and Tyler Streets is an opportunity to create a small plaza that could be a focal point for nearby neighborhoods. Along North Broad Street, ground floor retail uses activate the corridor, while improved streetscapes buffer pedestrians from cars. On-street parking could also be provided by moving in the existing road edge into private property. This could reflect the character of Downtown Monroe.

In total, the concept plan calls for 200,000 square feet of new commercial space with an estimated 92 residential units above half of the ground floor commercial space. This vertical mixed-use format is conducive to either apartments or condominiums. The plan also shows a total of 21 live/work units and 101 townhouses. The total estimated value of this plan is \$60,000,000.



A pedestrian-friendly gas station is envisioned that places the convenience retail element of the facility at the intersection of Tyler Street and North Broad Street. Pumps could then be placed to the north. The photo at left shows a similar gas station in San Diego, CA. This reflects the character of the station, but is not an appropriate architectural style for Monroe.

North Gateway Concept Plan (continued)



Downtown Concept Plan

The Downtown Concept Plan illustrates one option for infill development in Downtown Monroe. It is intended to show how development could occur in a way that preserves the historic core of downtown buildings, takes advantage of small block size, and preserves street connectivity. The proposed area is centered on the historic properties of community and architectural significance along Broad Street, and is loosely bound by Highland Avenue on the north, Jackson Street on the west, Davis Street on the south, and Madison Avenue on the east.

The concept plans shows a fine grained mix of new buildings and uses including retail/commercial, residential, live/work units, and townhouses around existing historic structures that should be preserved (shown in gray). New buildings are shown in red, with shading intended to illustrate intensity; the most intense mixed-use/commercial development are shown in the darkest shade of red, townhouses or live/work units are shown in medium red, and single family lots are shown in light red. The concept is intended to illustrate a transition from most urban along Broad and Spring Streets to least urban adjacent to existing single-family homes.

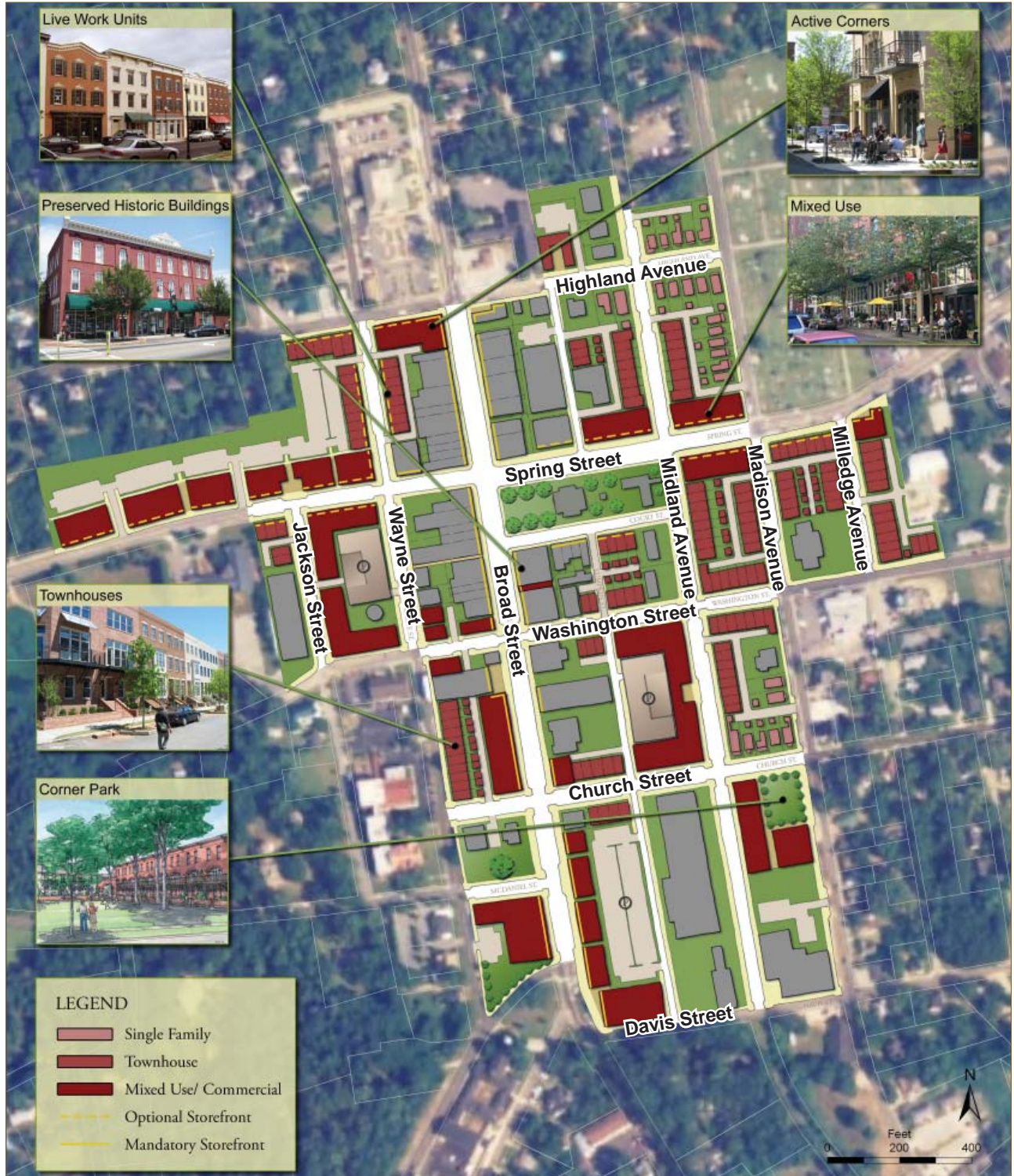
An important element of this concept plan is providing retail growth along Broad and Spring Streets in a manner that reinforces the existing retail patterns. To this end, areas where storefronts at the back of the sidewalk should be mandatory are shown. This will create a continuous shopping experience. On side streets, or where retail is not as viable, storefronts are shown as optional. This is not intended to suggest that it should only occur in these two corridors, but rather to suggest the most appropriate locations for such uses.

The concept plan also demonstrates how enhanced parking could be provided in downtown. All new buildings self-park, but additional public parking is contemplated in two new public decks: one on the block bounded by Jackson, Wayne, West Spring, and West Washington Streets, and the other between East Washington and East Church Streets. Both decks must include other uses integrated around the parking structure so that they serve as urban buildings, rather than just parking. Lastly, on-street parking is envisioned throughout downtown and developers will move in the existing curb eight feet to provide on-street parallel spaces.

Pocket parks are provided throughout the concept plan. Most notable is the one at the southwest corner of Church and Midland Streets, which features townhouses around it to create an appropriate park edge. Other smaller parks are envisioned in new developments.

This concept plan shows a scenario that envisions an estimated total of 300,000 new square feet of retail/commercial space, 257 apartment or condominiums above ground floor retail/commercial, 24 live/work units, and 116 townhouses.

Downtown Concept Plan (continued)



- Rehabilitate and construct new buildings at key sites in Downtown Monroe. (O-27)

Recommended private sector projects include:

- *A new two-to-four story mixed-use building at 131 Broad Street (south of Walton Hotel).*
- *Renovation of the old rail depot and surrounding warehouses into housing, office, or live/work space.*
- *A two-to-four story mixed-use building at the southwest corner of West Highland Avenue and Broad Street (former church site).*
- *A mixed-use building as part of a potential parking deck on the block bounded by Spring, Wayne, and Jackson Streets. The site can accommodate a standard 120 by 220 ft. pre-cast concrete deck with 50 food deep “liner” buildings along Jackson and Spring Streets.*
- *Redevelopment of non-historic properties on South Broad Street (between Washington and Davis Streets) into two-to-four story mixed-use buildings.*

Please see the Downtown Concept Plan on page 3:8.

- Convert the public housing on East Washington Street into owner-occupied housing. (O-29)

The community recognizes the importance of low-income housing, but there is a desire to also improve home ownership rates. As such, it is recommended that the East Washington Street site be renovated or redeveloped into owner-occupied low income housing.



Potential character of a mixed-use building for 131 Broad Street



Public housing on East Washington Street could be renovated or redeveloped into owner-occupied housing

3.3 Community Pattern Recommendations

These recommendations are organized into Street & Block Patterns, Parcel Patterns, Building Patterns, Lot Patterns, and Architecture and Historic Resources. They are intended to protect Monroe's historic form, while providing for appropriate growth.

Street and Block Pattern Recommendations

The interconnected streets and small blocks of the historic downtown should be preserved and protected. They provide multi-modal accessibility and are part of what differentiates Monroe from suburban areas. At the same time, this system should serve as a model of growth for new development.

Street & Block Pattern Policies

- Prohibit street abandonment or closure as part of new development, unless new streets are created with equal or greater connectivity to the existing grid.
- Require streets in new developments to connect into existing streets and avoid the creation of dead-ends or cul-de-sacs.
- Establish maximum new block sizes of 600 feet per face or 3,200 feet of total frontages (except where topography or natural features prevents this).

Parcel Pattern Recommendations

The small lots in areas recommended for redevelopment by this plan are a historic feature, but they are also a hindrance to redevelopment. As such, recommendations pertaining to them reflect land use recommendations, particularly where redevelopment is desired.

Parcel Pattern Policies

- Preserve the existing small lot patterns where small scale infill redevelopment is desired
See areas shown as T3 and T4 on the Framework Plan.
- Utilize existing large lots, such as the mill sites, for larger scale redevelopment.
- Support lot consolidation where major redevelopment is desired.
See areas shown as T5 on the Framework Plan.



Existing street and block patterns transition from Downtown Monroe to existing neighborhoods



New large developments should reflect historic block and parcel patterns



Large lots, such as the mill properties, are ideal for large redevelopments, with fewer hindrances than smaller lots

Building Pattern Recommendations

Small, differentiated, and street-oriented buildings provide Monroe with much of its small town charm. These buildings should serve as a model for new buildings in the Study Area.

Building Pattern Policies

- Utilize the sidewalk-oriented, small setbacks along Broad Street as models for new commercial buildings both in downtown and in other activity nodes.
- Require new buildings to front the streets with stoops, porches, storefronts, or other pedestrian-friendly means, rather than with blank walls or parking.

Building Pattern Projects

- Amend the zoning code. (O-30)
Current zoning does not support community-desired building patterns and must be changed where pedestrian-oriented redevelopment is desired.

Lot Typology Recommendations

Monroe's historic lot types are generally smaller than those allowed by current zoning. This pattern must be made legal again if the community is to develop according to the vision of this plan.

Lot Typology Projects

- Amend the zoning code. (O-30)
Current zoning does not support community-desired lot patterns and must be changed where historically compatible redevelopment is desired.



Small, street-oriented historic buildings help give downtown its charm



It is often illegal by zoning to build new buildings like historic properties, due to larger requirements for setbacks

Architecture & Historic Resource Recommendations

These recommendations are intended to protect and enhance Monroe's sense-of-place by preserving its buildings and community fabric and creating new places that build on this rich history of town building. This is achieved by identifying and preserving historic resources and utilizing redevelopment to mend the urban fabric.

Architecture & Historic Resource Policies

- Support the preservation and rehabilitation of:
 - *Historic commercial buildings along Broad Street*
 - *Historic homes along Broad Street*
 - *Other existing historic neighborhoods*
 - *Historic churches and public buildings*
 - *Historic mill and warehouse buildings*
- Prohibit EIFS (fake stucco) along street-facing facades.
- Provide buildings that define the public street, like walls define a room, and ensuring that balconies, porches, etc. provide articulation but do not destroy the delineation of the street.
- Use historic styles found in Monroe as a basis for future development compatible with the surrounding community.
- Ensure that buildings in commercial and mixed-use areas:
 - *Provide roofs that appear primarily horizontal from the street by utilizing a parapet wall, or the like*
 - *Provide continuous storefronts along the sidewalk, as identified in the concept plans*
 - *Prohibit parking between a building and the street*
 - *Are faced in full-depth brick or hard coat stucco*

Architecture and Historic Resource Projects

- Amend the zoning code. (O-30)
Specify design-based requirements for new development.



Historic civic buildings must be preserved if local identity is to be retained



For the most part, these new homes along Alcovy Street are compatible with Monroe's historic character



New buildings should reflect the rich architectural diversity of Monroe, including its industrial heritage

3.4 Transportation Recommendations

The transportation recommendations for the Monroe Town Center are intended to enhance pedestrian, vehicular, and bicycle facilities within the Study Area. They strive to do this in a way that improves traffic flow, pedestrian safety, and conditions for bicycling. Central to this is a philosophy that recognizes the need for a balance between these modes and strong consideration for the land use vision shown in the Framework Plan.

Due to the strong relationship between transportation and land use, the transportation recommendations are summarized here by geographic area.

North Broad Street

Please see the concept plan on page 3.6 for the land use vision for this area.

The North Broad Street corridor serves as the gateway to Monroe and the center of the city. In order to emphasize the historic nature of the city, “Monroe Historic District” signs are proposed on US 78 to be seen by those entering the city from North Broad Street. It is also proposed to construct new handicap accessible sidewalks along the east side of North Broad from Marable Street to US 78 and several streets connecting to Broad Street to facilitate pedestrian movement from the neighborhoods to the retail and commercial district along North Broad.

A park and ride lot is proposed at US 78 and SR 11. This could serve the Atlanta or Athens commuters who reside in Monroe and the surrounding areas. This location could also be instituted as part of a future GRTA commuter bus service.

Downtown Core

Please see the concept plan on page 3.8 for the land use vision for this area.

Bicycle racks, “Share the Road Markings” on Midland Street, traffic calming (Church Street, Highland Avenue, and Edwards Street), and new pedestrian facilities are proposed downtown to encourage pedestrian and bicycle transportation, and therefore reduce vehicular traffic. These include filling-in sidewalk gaps along Spring Street, Wayne Street, Milledge Avenue, and Lumpkin Street.

A 200-250 space parking deck is proposed on the block surrounded by Spring Street, Wayne Street, and Jackson Street to provide



The Study Area’s streets should serve both drivers and pedestrians



Pedestrian facilities and landscaping on North Broad Street would improve pedestrian safety and aesthetics



Downtowns benefit from pedestrian improvements that make it safe to walk from nearby neighborhoods

increased shared parking spaces and reduce the need for surface parking lots. This will allow said lots to redevelop into other uses. The deck should not be accessed from Spring Street, but rather Wayne or Jackson Street.

Monroe needs additional north-south lanes for local and emergency services. Broad Street (SR 11) is currently the corridor for north-south traffic through Monroe, but volumes are at maximum capacity. If improved, Madison Avenue is a potential reliever for traffic on Broad Street. In addition, truck traffic on Broad Street over the longer-term can be reduced by establishing an alternative truck route and removing Broad Street from the state network. In the short-term, improved signal coordination and timing on Broad Street is proposed to improve vehicular and pedestrian traffic through town.

A special events shuttle could be implemented during downtown festivals to bring customers from off-site parking areas. This could lead to establishing a limited transit service that would provide transportation for low-income workers to downtown jobs.

South Broad Street

Proposed improvements in the South Broad Street portion of the study area include improvements in pedestrian accommodation and vehicle circulation. The section of Broad from Alcovy Street south to Second Street is included in the recently funded DOT Enhancement Project. Another proposed pedestrian facility would connect the Broad Street Corridor to the recently completed Recreation Complex at Madison Avenue and Norris Street.

Two multiuse trails are proposed in the Mears Street area south of downtown. One proposed trail would run alongside the railroad from the depot south to the reservoir. The other would run along the creek from Walton Mills through the Avondale Mills property as part of its redevelopment.

Avondale Mills Redevelopment Area

In order to improve connectivity from Alcovy Street to Broad Street, an east-west street from Shamrock Drive to 4th Street via Avondale Mills is proposed. Design and construction of this connector could be incorporated into the private redevelopment of the property.

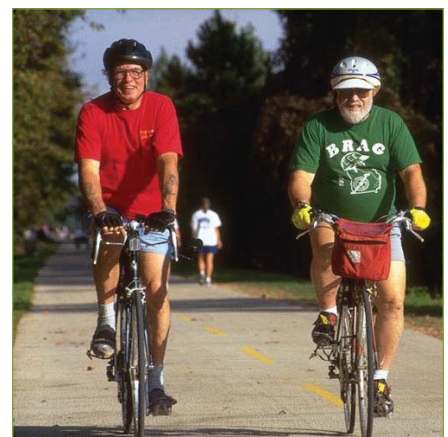
Alcovy Street, which connects the proposed neighborhood center near Avondale Mills to the downtown area, is currently not very bicycle friendly. Establishing a combination of bike lanes and “Share the Road” markings will encourage bicycle transportation and relieve vehicular traffic in the downtown area.



This public parking deck in Boulder, CO, is lined with retail and offices and fits in with its downtown



Removing trucks from Broad Street with a truck route around town would benefit downtown's pedestrian character



If implemented, multi-use trails could improve public health in Monroe by making bicycling safer

Traffic System Recommendations

Traffic recommendations are aimed at reducing vehicular/pedestrian conflict, rerouting/calming truck traffic through downtown, improving safety, and accessibility. To this end, recommendations focus on improving existing facilities, enhancing connectivity, and provide multiple route options and alternative truck route. Emphasis is placed on improving pedestrian and bicycle facilities as well as safer roadway access.

Traffic System Policies

- Limit curb cuts on major streets and require access from side streets.
- Encourage higher density housing within walking distance of downtown, retail, and potential future transit opportunities to encourage fewer auto-related trips.
- Encourage developers to install on-street parking adjacent to their projects during development.
On-street parking is needed for a downtown to serve quick shopping trips or visitors to above-shop lofts. Unfortunately, right-of-way is limited on many streets in Monroe. This obstacle can be overcome if developers move the existing curb back eight feet into their property to create parallel parking spaces. Where above-ground utilities exists, spaces can be put underneath the lines while poles remain in the same spot.
- Support efforts to temporarily close Broad Street to traffic during festivals.
This can only occur after a truck route around downtown has been established.

Traffic System Projects

- Upgrade Madison Avenue as alternate north south capacity. (T-10)
Monroe needs additional north-south travel lanes for through traffic. Current volumes on Broad Street (SR 11) are at maximum capacity. Madison Avenue is a potential north-south travel alternative route. It is recommended to signalize, repave, and improve the street geometry to accommodate truck traffic. This would require a slight widening to two 12 foot lanes and improvements at major intersections where trucks would enter and exit it.
- Remove Broad Street from the state network by establishing an alternative truck route. (T-11)
The proposed truck route would include constructing a new road through the airport site along with improvements to existing streets outside the airport site.
- Create an east-west street from Shamrock Drive to 4th Street via Avondale Mills. (T-12)
Currently there is limited connection between Alcovy Street and South Broad Street at the mills area. When the Avondale Mill site is redeveloped, this project should be included so that drivers can drive from Alcovy Street, through the project, and to South Broad Street. It need not be a direct route, but rather, may be achieved with street connectivity through the site.
- Improve signal coordination and timing on Broad Street to improve traffic flow. (T-22)
This project includes a pedestrian phase to avoid throwing off synchronization when pedestrians push button.
- Install traffic calming facilities on Church Street, Highland Avenue, and Edwards Street. (T-23)
Traffic calming measures could include speed tables or speed bumps.

- Study improvements to the intersection of Broad Street at Alcovy Street and Broad Street at Mears Street when the Avondale Mill is redeveloped. (T-13)
- Create downtown directional signage program, including parking directions. (T-25)
- Install “Monroe Historic District” directional signs on I-20 and US Highway 78. (T-29,O-32)
- Construct a 200-250 space parking deck on the block surrounded by Spring, Wayne, and Jackson Streets. (T-28)
The ground level of the deck must have retail or office use to ensure street level activity, with offices or dwelling units above.

Pedestrian Facility Recommendations

The following recommendations are intended to encourage walking in Downtown Monroe and activity centers, and facilitate pedestrian connections in and around the study area.

Pedestrian Facilities Policies

- Encourage developers to bury utilities during redevelopment.
- Raise the curb, repair the gutters, and consolidate driveways as part of all sidewalk and streetscape projects.

Pedestrian Facilities Projects

- Install pedestrian facilities on both sides of North Broad Street from Walton Street to US 78. (T-2)
This improvement is the highest priority transportation project of this study. It will improve aesthetics at a key gateway to town, and allow many low income residents living on the northern part of the study area to safely access downtown business and services. It could also spur redevelopment of adjacent commercial sites.
The proposed pedestrian facilities include new sidewalks, accessible ramps, trees, driveway consolidation, and lighting along both sides within the existing public right-of-way.
- Install pedestrian facilities on both sides of South Broad Street from Davis Street to 2nd Street. (T-1)
This project extends the existing downtown pedestrian facilities south from their current terminus at Davis Street. It includes new sidewalks, driveway consolidation, accessible ramps, trees, and lighting within the current right-of-way.



With proper design, directional signage can enhance a community, such as these signs in Bennington, Vermont



Repaired sidewalks are a key part to a successful streetscape



Pedestrian facilities seen here include appropriate sidewalk dimensions, pavement conditions, and vegetation buffer

- Construct sidewalks from 2nd Street to the new park at Norris and Madison. (T-3)
This project includes 6 foot wide sidewalks within the current right-of-way.
- Install pedestrian facilities along both sides of Spring Street, within the Study Area, including new sidewalks, accessible ramps, and lighting. (T-4)
- Install sidewalks where missing and upgrade existing sidewalks along the east side of Alcovy Street from Ammons Bridge Road to Sherwood Drive. (T-5)
This project includes new sidewalks, accessible ramps, and trees and lighting. These should likely be on the east side of the corridor, where there are existing sidewalks in areas and where topography is more conducive to said facilities.
- Create multiuse trails through Downtown Monroe. (T-24)
See bicycle facilities recommendations.
- Upgrade light fixtures along Broad Street within the Study Area. (T-27)
New fixtures should be designed to illuminate both the pedestrian and driver zones. They should also minimize glare into above-shop residents with cutoff luminaires.
- Upgrade the alley between Broad and Wayne Streets into a safe pedestrian walkway. (T-7)
This alley would provide access from the proposed public parking deck to Broad Street. It is currently a dark corridor, but could be improved with landscaping and lighting.

Bicycle Facility Recommendations

Downtown Monroe has the potential to become a more bicycle-friendly community. Many of the Study Area's side streets are already safe and convenient for cyclists. An opportunity exists to enhance and to add to this with bike lanes, bicycle parking, and other bicycle facilities.

Bicycle Facility Policies

- Require bicycle racks in new commercial, multifamily, and mixed-use projects.

Bicycle Facility Projects

- Create a multiuse trail from Walton Mills south through the Avondale Mills site. (T-24a)
An 8 to 12 foot wide gravel, concrete, or asphalt trail could run along the creek. Land could be made available via an access easement or donation to the City of Monroe, and the facility itself could be funded by public or private sources.
- Create a multiuse trail alongside railroad from the depot south to reservoir (T-24b).
An 8 to 12 foot wide gravel, concrete, or asphalt trail could be built along one side of the track within the 50 foot existing right-of-way. The City can either acquire an easement or the land along the railroad for the trail.
- Install "share the road markings" and signage on Midland Street from Church Street to Marable Street. (T-31)
This allows bicycles to share the road with vehicular traffic and should be undertaken concurrent with the following project.
- Install bicycle racks in downtown. (T-26)

This will build upon the existing Downtown Development Authority efforts.

- Establish a combination of bike lanes and “share the road” markings on Alcovy Street from Ammons Bridge Road to Broad Street. (T-30)

Transit Facility Recommendations

The City of Monroe currently does not have transit. The following recommendations are aimed at laying the foundation for future transit facilities.

Transit Policies

- Consider establishing limited transit service targeted towards allowing low-income workers to access jobs.

Transit Facilities Projects

- Create a park-and-ride lot at US 78 and US 11. (T-20)
This can be instituted as part of future GRTA commuter bus service, and could serve Atlanta or Athens commuters. A possible location of the lot is the old school bus lot. Existing building on site could be retained for park-and-ride commuter use.
- Establish a special events shuttle (T-21)
As Downtown Monroe becomes an a retail and entertainment destination and special events increase, private shuttle service could be implement during festivals to bring customers from off-site parking areas or nearby attractions into the downtown core.



Properly marked bike lanes increase safety for all modes of transportation and contribute to a pleasant streetscape



A park and ride lot could be located in the old school bus parking lot, adjacent to US 78 and US 11

3.5 Demographic & Market Recommendations

The policies and projects presented below are intended to enhance the business environment in the Monroe Town Center Study Area. In recent years, the Study Area in general, and downtown in particular, have seen positive redevelopment momentum. Unfortunately, the area still fails to meet its full potential. These recommendations are intended to allow it to come closer to achieving this.

Demographic & Market Policies

- Encourage increased homeownership in Monroe.
- Target home-related business.

Monroe already does well in home-related businesses such as furniture, home furnishings, and art. Given the housing growth that has occurred (and is projected) in the trade areas, downtown could position itself as a one-stop shop for new homeowners to fulfill all of their home decor needs. There is projected to be demand for:

- *Furniture stores: The primary trade area loses \$3.5 million in sales to other areas each year. It is projected that it can support 5,600 - 11,000 sf of new space today.*
 - *Home furnishings: The primary trade area loses \$5.6 million in sales annually. It is projected that it can support 4,600 - 9,000 sf of new space today. A store like Pier 1 Imports typically has sales of \$1.7 million per year.*
 - *Hardware: Hardware stores are already found in Monroe and have little unmet demand, amounting to only 2,800 sf of additional space today.*
- *Target apparel businesses.*

There is a large opportunity in this category for women's and family apparel; the trade area leaks \$20 million per year. This translates to unmet demand of 29,000 sf for apparel and 6,000 sf for accessories. A store like The Gap has sales of \$3 million a year, while Goody's sells \$4.6 million per year.

- *Target general merchandise stores.*
Even with Wal-mart the trade area loses \$40 million a year.
- *Target antique stores.*

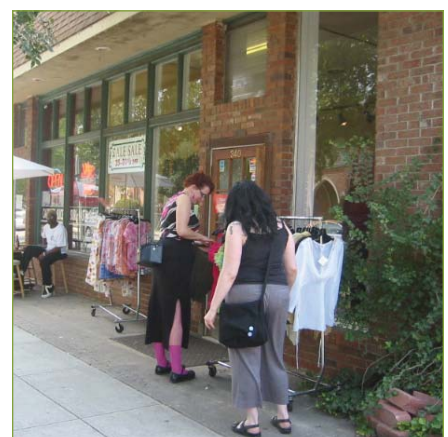
Because of its historic character, current gain of \$1.2 million in "used merchandise," and sales nearly three times the category benchmark, Monroe could enhance this with additional antiques stores while promoting itself as an antiques destination.



Above shop condominiums should be priced from \$150,000 - \$250,000



Downtown Monroe is already well served by hardware stores



Women's apparel could be a market niche served by downtown

- Support bed and breakfasts in historic homes.
- Target restaurants.

Restaurants are a huge opportunity. The trade area loses \$22 million annually, resulting in a demand for 35,000 sf of new space today. These could serve both locals and regional visitors. "Drinking places" should also be considered.

- Target electronics stores.

The trade area leaks \$8 million annually in this category, translating to 5,000 - 10,000 sf today. Stores like Rex typically do \$1.6 million a year in sales and Radio Shack, \$800,000.

- Target speciality retail.

There is a projected demand for sporting goods (3,000 - 6,000 sf); shoes (3,700 - 7,000; one store or an expansion); jewelry (2,000-4,000 sf; \$3 million per year), book stores (3,700 sf), gift stores (2,500 sf; one store), and hobby & games, sewing/needlework stores.

- Target specialty food stores.

There is a small opportunity for specialty meats and vegetables, which currently have an annual leakage of \$1.5 million. A greater opportunity exists for beer and wine, which leaks \$4 million in the primary trade area. There is potential for small wine shop downtown.

- Position Monroe as "Downtown Walton County"

Target growth areas to north and west and create Local loyalty program -expand market base.

- Build and promote Monroe's antiques cluster.

Business recruitment and joint advertising can do this.

- Expand market segments targeting mixed-use and a range of incomes

Demographic & Market Projects

- Study creating a Tax Allocation District (TAD). (O-14)

Because of the high costs of a redevelopment, a Tax Allocation District may be necessary to spur private development and provide local funding for public projects.

- Promote mixed-use and downtown housing. (O-7)

Housing should be priced from \$150,000 - \$250,000 for condominiums and townhouses, and \$200,000 - \$400,000 for detached single-family homes.

- Create a business catalyst program. (O-10)



Specialty shops could serve both residents and visitors



Specialty food could blend well with Monroe and Walton County's rural heritage



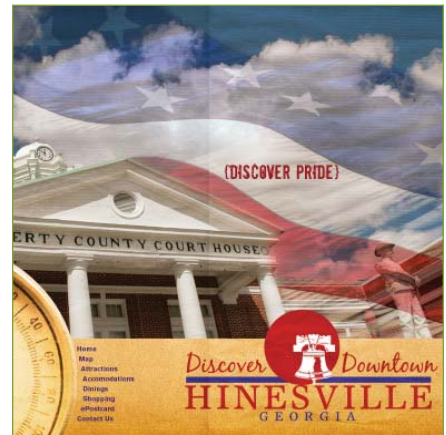
This mill in North Adams, MA, houses incubator space for artists and small businesses

This could include business incubator space for retail and office, possibly in old mills. It could focus on entrepreneurship, keeping employees in area, or even minority businesses.

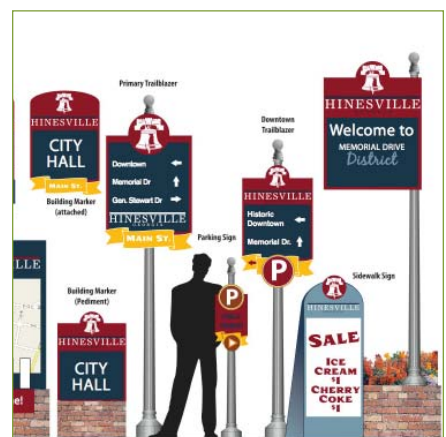
- Provide workforce development and training. (O-11)
This could be in cooperation with SBDC/SCORE. It could provide low income training and education, as well as programming at the previously-identified incubator space.
- Market development site identified in this plan. (O-13)
This should include a database of available properties with site specific data, as well as marketing materials.
- Create brand identity & marketing plan. (O-1)
There should be a brand identity established specifically for “Monroe Town Center” or “Downtown Monroe.” It should be the anchor of a seamless joint branded marketing plan.
- Join the National Trust for Historic Preservation’s Main Street Program. (O-17)
- Create a Downtown Monroe website. (O-2)
A website could market downtown’s assets to visitors. It could also market development sites and provide information on the implementation of the LCI vision.
- Create a wayfinding program. (O-3, T-25)
This should include signage to direct drivers and pedestrians through community. It should specifically include directions to parking, businesses, and civic buildings.
- Developed branded marketing materials. (O-4)
These could showcase downtown shopping and dining, historic information, or events.
- Create a branded economic development package. (O-6)
This should include a market analysis, list of available properties, and list of available Incentives.
- Recruit targeted businesses to downtown. (O-8)
- Create a partnership to recruit businesses and development. (O-9)
This should include the DDA, City, Chamber, Walton Development Authority, and the private sector.
- Make developers aware of affordable Housing Initiatives and create an incentive program. (O-15)
These include GAHC loans, housing tax credits, historic preservation credits, and certain community development block grants to aid in home ownership.
- Create a community improvement district (CID). (O-16)



Many communities have established branding programs that celebrate their unique amenities



A website could be a portal to downtown for potential visitors and investors



Wayfinding can include local branding programs and direct visitors to key attractions

3.6 Public Facility Recommendations

The overall goals for the Broad Street corridor include ensuring adequate facilities to support both existing and future residents.

Public Facility Policies

- Support the conversion and renovation of community buildings where appropriate.
Allowing and encouraging the creative re-use of community buildings helps support community character. This can assist in allowing the history of the community to be passed down from generation to generation.
- Encourage the US Post Office to remain in downtown.
A vibrant downtown should contain many government and municipal buildings and other uses for the convenience of residents.

Public Facility Projects

- Convert the old elementary school into a community center, park, and amphitheater. (O-18)
- Issue RFPs to find a new use for unused schools. (O-19)
- Build a public pool near the existing library. (O-20)
Aligning public facilities adjacent to each other and to downtown helps to ensure active use and safety.



The existing gymnasium is meaningful in the community and could be reused for the future in a creative manner



The Monroe Elementary School could be converted into a use such as a community center

3.7 Environment & Open Space Recommendations

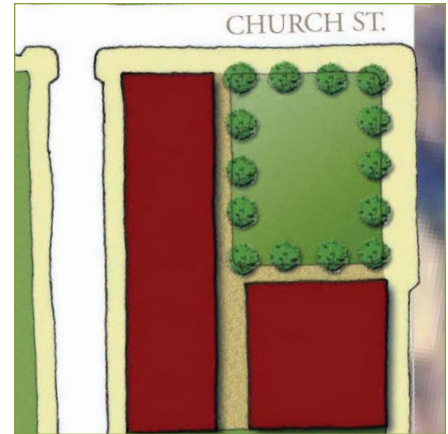
These recommendations are intended to enrich the public realm of Monroe by providing increased parks and open space. When coupled with recommendations in other sections, they will result in an improved quality of life for residents and visitors.

Environment & Open Space Policies

- Face new development onto open spaces to keep “eyes on the park.”
In response to concerns that parks could feel unsafe to use, placing buildings around and facing parks can make them safer.
- Prevent new development in undeveloped floodplains.
- Require usable green space as part of large developments and redevelopments.

Environment & Open Space Projects

- Amend the zoning code. (O-30)
Require pocket parks and plazas in new commercial and mixed-use developments rather than unusable, scattered green spaces. This could result in many new open spaces throughout the Study Area.
- Install landscaping buffer in front of the Monroe utility warehouse area. (O-21)
This highly visible site on North Broad Street could benefit the community if screened.
- Create a park around the substation, just west of the library, including community gardens and a dog park. (O-22)
- Create a greenspace along the creek running through the Avondale Mills site. (O-23)
This is currently planned as part of site redevelopment.
- Create small pocket park at East Church Street and Madison Avenue. (O-24)
A small pocket park could be created and surrounded by buildings to create an appropriate park edge.



Concept for a small park at the corner of Church Street and Madison Avenue



Rendering looking south from Church Street at the potential small park at its intersection with South Madison Avenue



A greenspace within the Avondale Mills site could also house walking or multi-use trails



Town Center LCI
Section 4:
Implementation

January 2008

This page is intentionally left blank

Table of Contents

4.1 Action Program..... 4:1

4.2 Land Use & Zoning Changes..... 4:10

4.3 Population & Employment Projections 4:11

4.4 Access Management Plan..... 4:13

4.5 Consistency with LCI Components 4:14

This page is intentionally left blank

4.1 Action Program

The Action Program outlines the next steps after adoption of this plan by the City of Monroe. It includes a list of projects, time lines and responsible parties and is intended to serve as a blueprint for achieving the community's vision for its future.

Stakeholders identified several efforts to assure implementation. These included continued diligence on the part of area residents, businesses, and the City of Monroe to monitor development in the Study Area and ensure compliance with the vision of this plan. Part of this should be revisions to the plan, as needed. Stakeholders must also work with the City of Monroe to implement land use and zoning changes, which support the vision.

Most Recommendations are provided in an aggressive five year time line, although some can clearly extend beyond this time period as funding becomes available. Projects in the near future represent those addressing areas with the most critical need for public improvement or those where public investment can spur private investment. Longer-term projects are less urgent, but equally key to the long-term success of this study.

Community Priorities

During the public outreach process, the community was asked to prioritize public and private projects recommended within the Study Area. The following represents a summary of these priorities in no particular order of priority.

- Creation of a Tax Allocation District: See page 3:22.
- New pedestrian facilities (streetscape) on North Broad Street: See page 3:18-3:19.
- New pedestrian facilities (streetscape) on South Broad Street: See page 3:18-3:19.
- North Gateway Concept Plan: See pages 3:6-3:7.
- Mills of Monroe Concept Plan: See page 3:5.

While some of these are not projects that can be publicly implemented, it is still important for the City of Monroe to facilitate and support private sector proposals that can bring them into reality. For those that are, including the two pedestrian facilities, it is critical that the City of Monroe be prepared to pre-qualify and apply for LCI funding when it is available.



The Action Program identifies many public steps necessary to spur private investment



Community wishes should be given priority during the implementation process



Many items focus on improving the pedestrian experience on the corridor

Local Funding

As an LCI Study, the ARC has committed to making funding available for implementation of plan elements related to transportation. Their expressed desire is for public infrastructure improvements to spur private investment in existing activity centers. Transportation projects may also be funded through a variety of other sources administered through the ARC. The City of Monroe should work with ARC staff to ensure that projects that require transportation funds are included in future Regional Transportation Plans (RTPs). Revisions to such are made every five years. Most transportation funds administered via the ARC or using federal dollars will require a 20% local match.

Sources for the required local match or other funds could include:

- **Community Improvement District (CID):** A CID is a self-imposed, self-taxing district run by a non-profit organization. A CID is charged with raising funds from commercial properties for public improvements. Such initiatives are strongly encouraged by this study.
- **Tax Allocation District (TAD):** A TAD is a special district created by a local government in which bonds are issued to support public improvements associated with new development. Said bonds are retired with taxes generated by new developments. A TAD is under consideration for the town center area and is strongly recommended for Monroe.
- **Private Donations:** Local matches could be obtained by soliciting area property owners, businesses, and residents.

Private funds may also be used to fund specific “special interest” projects. For example, the PATH Foundation funds multi-use greenway trails, while the Trust for Public Land and the Blank Foundation sometimes fund park projects.

- **Surface Transportation Program (STP) funds:** The STP provides flexible funding that may be used by localities for projects on any Federal-aid highway, including bridge projects on any public road, transit capital projects, and intercity and intercity bus terminals and facilities.
- **Transportation Enhancement (TE) funds:** These funds from the federal government can be used to expand travel choice, strengthen the local economy, improve the quality of life, and protect the environment. Streetscape, pedestrian and bicycle facilities, and gateways are some of the projects that can qualify for TE funds.

Without detailed analysis that is beyond the scope of this study, the ideal local match mechanism cannot be determined. However, the City of Monroe should carefully explore all available options.

On-Going Steps

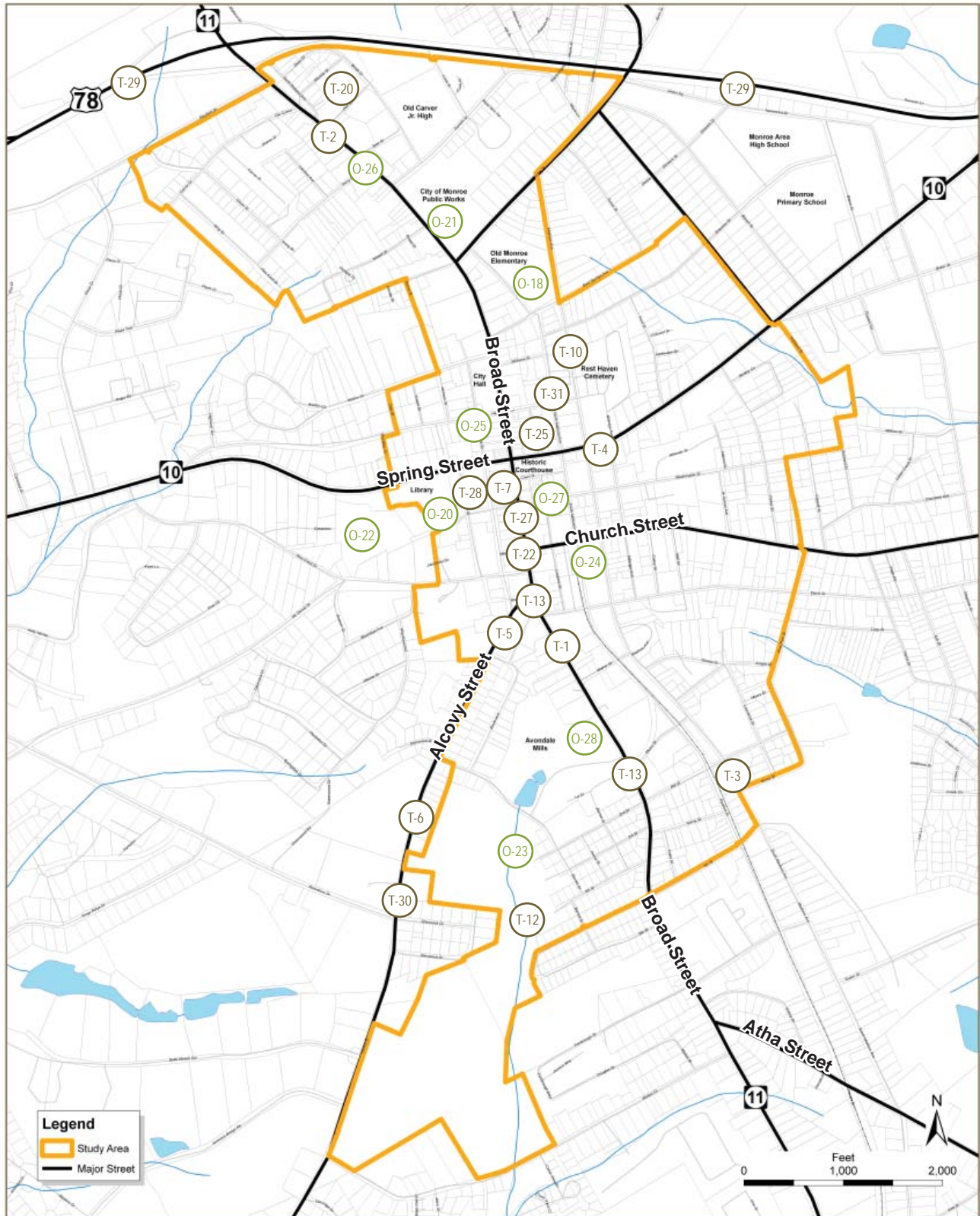
The realization of the vision contained herein will require a long-term commitment from government, residents, business, and property owners. The plan's aggressive vision cannot be achieved overnight, and must be regularly reviewed to remain relevant to Monroe Town Center. Any plan that does not do this risks obsolescence.

As the City of Monroe moves forward with implementing the vision of this study, it is critical that the following are kept in mind:

- **The Plan's Lasting Vision:** Of all of the components of this study, the vision should represent its most lasting legacy. The ideas contained in Section 2: Visioning represent the results of an extensive and inclusive public involvement process. It is highly unlikely that the general vision and goals resulting from such process will change significantly, although the steps to achieving them may.
- **The Need for Flexibility:** While the vision is unlikely to change, it is critical that the Monroe community recognize that the ways in which the vision is achieved can and will change. The future addition or subtracting of policies or projects should not be viewed as a compromise of the study, but rather its natural evolution in response to new conditions. Many assumptions were used to guide this process including: the regional and national economy; land costs; transportation costs; transportation funding programs; and development trends are never fixed. The City of Monroe must be prepared to respond to changes of these and other factors in order to ensure a fresh, relevant plan.
- **An Annual Review:** The ARC requires updates to the Five Year Action Plan when the schedule contained within it has passed. Yet five years is often far too long for a community to wait before reviewing a plan. Starting in January of 2009, the City of Monroe is encouraged to hold a joint public work session every January to review the plan's status. This should include a review of projects completed, projects under-way, and projects that may need to be added. Any recommended changes to the plan should be recorded and incorporated in an ordinance amending the official study or held for the required five-year update.
- **A Development Guide:** One of the greatest long-term values of this document, in addition to its role in procuring transportation funding, is that it lays out a detailed land use vision. To this end, as development proposals are submitted to the City of Monroe, said proposals should be reviewed for compatibility with the plan. The plan contains specific recommendations for specific sites, and the City of Monroe should use the development review process to work with the private sector to achieve this vision.

By being mindful of these four ideas, the Monroe Town Center LCI can guide positive change in the greater Monroe and Walton County area for years to come.

Figure 4.1: Location Specific Proposed Projects



FIVE YEAR IMPLEMENTATION PLAN

Monroe, Georgia LCI Study Area: Transportation Projects

ID	Description	Type of Improvement	Engineering Year	Engineering Costs	ROW Year	ROW Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source & Match Amount
Pedestrian												
T-1	Pedestrian Facility - Broad Street (Davis St to 2nd St)	Pedestrian	2008	\$312,000	2009	\$0	2010	\$2,080,000	\$2,392,000	City	TE Grant	SPLST \$790,400
T-2	Pedestrian Facility - N. Broad St, Marable St to US 78	Pedestrian	2010	\$330,000	2011	\$0	2012	\$2,200,000	\$2,530,000	City	LCI, TAD	SPLST \$506,000
T-3	Pedestrian Facility - Route to Park (2nd Street to new park)	Pedestrian	2012	\$75,000	2013	\$0	2014	\$500,000	\$575,000	City	TE Grant	SPLST, TAD \$190,000
T-4	Pedestrian Facility - Spring St	Pedestrian	2014	\$225,000	2015	\$0	2016	\$1,500,000	\$1,725,000	City	LCI, TAD, TE Grant	SPLST, TAD \$570,000
T-5	Pedestrian Facility - Alcovy St (Ammons Bridge Rd to Sherwood Dr)	Pedestrian	2015	\$90,000	2016	\$0	2017	\$600,000	\$690,000	City	TE Grant	SPLST, TAD \$228,000
T-6	Sidewalk Masterplan Implementation (53,387 ft)	Pedestrian	Varies	\$776,310	n/a	\$0	Varies	\$5,175,400	\$5,951,710	City	SPLST, CDBG	SPLST \$1,811,380
T-6a	SR 11, Church St to Davis St (646 ft)	Pedestrian	2008	\$9,690	n/a	\$0	2008	\$64,600	\$74,290	City	SPLST, CDBG	SPLST \$22,610
T-6b	Dean St (1,517 ft)	Pedestrian	2008	\$22,755	n/a	\$0	2008	\$151,700	\$174,455	City	SPLST, CDBG	SPLST \$53,095
T-6c	Morrow St (522)	Pedestrian	2008	\$7,830	n/a	\$0	2008	\$52,200	\$60,030	City	SPLST, CDBG	SPLST \$18,270
T-6d	N Midland Ave (732 ft)	Pedestrian	2008	\$10,980	n/a	\$0	2008	\$73,200	\$84,180	City	SPLST, CDBG	SPLST \$25,620
T-6e	Oak St (560 ft)	Pedestrian	2009	\$6,400	n/a	\$0	2009	\$56,000	\$64,400	City	SPLST, CDBG	SPLST \$19,600
T-6f	SR 11, Mayfield Dr to Sorrells St (1,593 ft)	Pedestrian	2009	\$23,895	n/a	\$0	2009	\$159,300	\$183,195	City	SPLST, CDBG	SPLST \$55,755
T-6g	Cook St (643 ft)	Pedestrian	2009	\$0,645	n/a	\$0	2009	\$64,300	\$73,945	City	SPLST, CDBG	SPLST \$22,505
T-6h	Bold Spring Ave (931 ft)	Pedestrian	2009	\$13,965	n/a	\$0	2009	\$93,100	\$107,065	City	SPLST, CDBG	SPLST \$32,585
T-6i	Midland Ave (248 ft)	Pedestrian	2010	\$3,720	n/a	\$0	2010	\$24,800	\$28,520	City	SPLST, CDBG	SPLST \$5,680
T-6j	2nd St (1,141 ft)	Pedestrian	2010	\$17,115	n/a	\$0	2010	\$114,100	\$131,215	City	SPLST, CDBG	SPLST \$39,935
T-6k	3rd St (810 ft)	Pedestrian	2010	\$12,150	n/a	\$0	2010	\$81,000	\$93,150	City	SPLST, CDBG	SPLST \$28,350
T-6l	4th St (823 ft)	Pedestrian	2010	\$13,845	n/a	\$0	2010	\$92,300	\$106,145	City	SPLST, CDBG	SPLST \$32,305
T-6m	Giles St (356 ft)	Pedestrian	2010	\$5,340	n/a	\$0	2010	\$35,600	\$40,940	City	SPLST, CDBG	SPLST \$12,460
T-6n	5th St (1,456 ft)	Pedestrian	2011	\$21,840	n/a	\$0	2011	\$145,600	\$167,440	City	SPLST, CDBG	SPLST \$50,960
T-6o	GW Carver Dr (1,672 ft)	Pedestrian	2011	\$25,080	n/a	\$0	2011	\$167,200	\$192,280	City	SPLST, CDBG	SPLST \$58,520
T-6p	Mears St, from SR 11 to Madison Ave (711 ft)	Pedestrian	2011	\$10,665	n/a	\$0	2011	\$71,100	\$81,765	City	SPLST, CDBG	SPLST \$24,885
T-6q	Mayfield Dr (1,601 ft)	Pedestrian	2012	\$24,015	n/a	\$0	2012	\$160,100	\$184,115	City	SPLST, CDBG	SPLST \$56,035
T-6r	Mill St (1,467 ft)	Pedestrian	2012	\$22,005	n/a	\$0	2012	\$146,700	\$168,705	City	SPLST, CDBG	SPLST \$51,345
T-6s	Pine Knoll (354 ft)	Pedestrian	2012	\$5,310	n/a	\$0	2012	\$35,400	\$40,710	City	SPLST, CDBG	SPLST \$12,390
T-6t	Nomis St, from SR 11 to Redford St (711 ft)	Pedestrian	2013	\$10,665	n/a	\$0	2013	\$71,100	\$81,765	City	SPLST, CDBG	SPLST \$24,885
T-6u	Nowell St (1,463)	Pedestrian	2013	\$21,945	n/a	\$0	2013	\$146,300	\$168,245	City	SPLST, CDBG	SPLST \$51,205
T-6v	Southview Dr (384 ft)	Pedestrian	2013	\$5,760	n/a	\$0	2013	\$38,400	\$44,160	City	SPLST, CDBG	SPLST \$13,440
T-6w	Felker St (1,526 ft)	Pedestrian	2013	\$27,390	n/a	\$0	2013	\$162,800	\$126,615	City	SPLST, CDBG	SPLST \$63,910

FIVE YEAR IMPLEMENTATION PLAN

Monroe, Georgia LCI Study Area: Transportation Projects

ID	Description	Type of Improvement	Engineering Year	Engineering Costs	ROW Year	ROW Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source & Match Amount
T-6x	W Habitable St (1,462 ft)	Pedestrian	2014	\$18,915	n/a	\$0	2014	\$126,100	\$145,015	City	SPL0ST, CDBG	SPL0ST \$44,135
T-6y	W Washington St (600 ft)	Pedestrian	2014	\$9,000	n/a	\$0	2014	\$60,000	\$69,000	City	SPL0ST, CDBG	SPL0ST \$21,000
T-6z	Walker Dr (528 ft)	Pedestrian	2014	\$7,920	n/a	\$0	2014	\$52,800	\$60,720	City	SPL0ST, CDBG	SPL0ST \$18,480
T-6aa	Hubbard St (1,014 ft)	Pedestrian	2014	\$15,210	n/a	\$0	2014	\$101,400	\$116,725	City	SPL0ST, CDBG	SPL0ST \$35,490
T-6bb	Ford St (1,101 ft)	Pedestrian	2015	\$15,515	n/a	\$0	2015	\$110,100	\$243,900	City	SPL0ST, CDBG	SPL0ST \$38,535
T-6cc	Millidge Ave (1,032 ft)	Pedestrian	2015	\$15,780	n/a	\$0	2015	\$105,200	\$127,420	City	SPL0ST, CDBG	SPL0ST \$36,820
T-6dd	N Wayne St (1,000 ft)	Pedestrian	2015	\$15,000	n/a	\$0	2015	\$100,000	\$61,295	City	SPL0ST, CDBG	SPL0ST \$35,000
T-6ee	S Wayne St (927 ft)	Pedestrian	2016	\$13,905	n/a	\$0	2016	\$92,700	\$106,605	City	SPL0ST, CDBG	SPL0ST \$32,445
T-6ff	Bell St (631 ft)	Pedestrian	2016	\$9,465	n/a	\$0	2016	\$63,100	\$72,335	City	SPL0ST, CDBG	SPL0ST \$22,085
T-6gg	Colley St (629 ft)	Pedestrian	2016	\$9,435	n/a	\$0	2016	\$62,900	\$34,960	City	SPL0ST, CDBG	SPL0ST \$22,015
T-6hh	S Lumpkin St (649 ft)	Pedestrian	2016	\$9,735	n/a	\$0	2016	\$64,900	\$74,635	City	SPL0ST, CDBG	SPL0ST \$22,715
T-6ii	Duke St (516 ft)	Pedestrian	2016	\$7,740	n/a	\$0	2016	\$51,600	\$30,705	City	SPL0ST, CDBG	SPL0ST \$18,060
T-6jj	Knight St (590 ft)	Pedestrian	2016	\$8,850	n/a	\$0	2016	\$59,000	\$102,925	City	SPL0ST, CDBG	SPL0ST \$20,650
T-6kk	E 5th St (267 ft)	Pedestrian	2017	\$4,005	n/a	\$0	2017	\$26,700	\$140,300	City	SPL0ST, CDBG	SPL0ST \$9,345
T-6ll	Lawrence St (1,254 ft)	Pedestrian	2017	\$18,810	n/a	\$0	2017	\$125,400	\$34,500	City	SPL0ST, CDBG	SPL0ST \$43,890
T-6mm	Mears St, from Pine Park St to Lawrence St (300 ft)	Pedestrian	2017	\$4,500	n/a	\$0	2017	\$30,000	\$120,980	City	SPL0ST, CDBG	SPL0ST \$10,500
T-6nn	Norris St, from Pine Park St to S Madison Ave (594 ft)	Pedestrian	2017	\$5,910	n/a	\$0	2017	\$59,400	\$39,560	City	SPL0ST, CDBG	SPL0ST \$20,790
T-6oo	Unknown St, from 2nd to 4th (440 ft)	Pedestrian	2017	\$6,600	n/a	\$0	2017	\$44,000	\$50,600	City	SPL0ST, CDBG	SPL0ST \$15,400
T-6pp	Pine Park St (2,069 ft)	Pedestrian	2018	\$31,035	n/a	\$0	2018	\$206,900	\$237,935	City	SPL0ST, CDBG	SPL0ST \$72,415
T-6qq	Stokes St (1,286 ft)	Pedestrian	2018	\$19,290	n/a	\$0	2018	\$128,600	\$147,890	City	SPL0ST, CDBG	SPL0ST \$45,010
T-6rr	Unknown St, from 2nd to 4th (452 ft)	Pedestrian	2018	\$6,780	n/a	\$0	2018	\$45,200	\$51,980	City	SPL0ST, CDBG	SPL0ST \$15,820
T-6ss	Launius Ave (895 ft)	Pedestrian	2019	\$13,425	n/a	\$0	2019	\$89,500	\$144,210	City	SPL0ST, CDBG	SPL0ST \$31,325
T-6tt	Alley (218 ft)	Pedestrian	2019	\$3,270	n/a	\$0	2019	\$21,800	\$218,615	City	SPL0ST, CDBG	SPL0ST \$7,630
T-6uu	Barrett St (1,901 ft)	Pedestrian	2019	\$28,515	n/a	\$0	2019	\$190,100	\$34,960	City	SPL0ST, CDBG	SPL0ST \$66,535
T-6vv	Colquitt St (304 ft)	Pedestrian	2020	\$4,560	n/a	\$0	2020	\$30,400	\$42,320	City	SPL0ST, CDBG	SPL0ST \$10,640
T-6ww	Day St (368 ft)	Pedestrian	2020	\$5,520	n/a	\$0	2020	\$36,800	\$59,340	City	SPL0ST, CDBG	SPL0ST \$12,880
T-6xx	E Washington St (1,220 ft)	Pedestrian	2020	\$18,300	n/a	\$0	2020	\$122,000	\$209,990	City	SPL0ST, CDBG	SPL0ST \$42,700
T-6yy	Green St (2,120 ft)	Pedestrian	2020	\$31,800	n/a	\$0	2020	\$212,000	\$72,680	City	SPL0ST, CDBG	SPL0ST \$74,200
T-6zz	High School Ave (632 ft)	Pedestrian	2021	\$9,480	n/a	\$0	2021	\$63,200	\$116,610	City	SPL0ST, CDBG	SPL0ST \$22,120
T-6aaa	King St (1,015 ft)	Pedestrian	2021	\$15,225	n/a	\$0	2021	\$101,500	\$67,850	City	SPL0ST, CDBG	SPL0ST \$35,525

FIVE YEAR IMPLEMENTATION PLAN

Monroe, Georgia LCI Study Area: Transportation Projects

ID	Description	Type of Improvement	Engineering Year	Engineering Costs	ROW Year	ROW Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source & Match Amount
T-6bbb	Mobley Cr (1,108 ft)	Pedestrian	2021	\$16,020	n/a	\$0	2021	\$110,800	\$115,000	City	SPLOST, CDBG	SPLOST \$38,780
T-6ccc	Nelson St (533 ft)	Pedestrian	2021	\$7,995	n/a	\$0	2021	\$53,300	\$68,310	City	SPLOST, CDBG	SPLOST \$18,655
T-6ddd	Northview St (344 ft)	Pedestrian	2021	\$5,160	n/a	\$0	2021	\$34,400	\$39,560	City	SPLOST, CDBG	SPLOST \$12,040
T-6eee	Public Alley (891 ft)	Pedestrian	2022	\$13,365	n/a	\$0	2022	\$89,100	\$102,465	City	SPLOST, CDBG	SPLOST \$31,185
T-6ggg	Public Alley, from E Washington St to dead end (358 ft)	Pedestrian	2022	\$5,370	n/a	\$0	2022	\$35,800	\$41,170	City	SPLOST, CDBG	SPLOST \$12,530
T-6hhh	Public Alley, from Walton St to Highland Ave (420 ft)	Pedestrian	2022	\$6,300	n/a	\$0	2022	\$42,000	\$48,300	City	SPLOST, CDBG	SPLOST \$14,700
T-7	Public alley upgrades (between Broad and Wayne in downtown core)	Pedestrian	2013	\$13,500	n/a	\$0	2015	\$90,000	\$103,500	City	SPLOST, TAD, CDBG	SPLOST, TAD \$103,500
Streets												
T-10	Medison Avenue Upgrade	Vehicular/Pedestrian	2013	\$900,000	2014	\$400,000	2015	\$6,000,000	\$6,900,000	City	SPLOST, TAD	SPLOST, TAD \$6,900,000
T-11	Truck Route	Vehicular	2009	\$250,000	2010	\$300,000	2011	\$2,550,000	\$2,900,000	City	SPLOST	SPLOST \$2,900,000
T-12	Avondale Connector	Vehicular/Pedestrian	2010	\$150,000	2010	n/a	2011	\$1,150,000	\$1,300,000	Private	City, Private	TAD \$230,000
T-13	Study of Broad Street/Alcoy Street and Broad Street/Mears Street Intersections	Vehicular/Pedestrian	201	\$15,000	n/a	\$0	0	\$0	\$15,000	Private, City	City, Private	SPLOST, TAD \$15,000
Other Transportation Improvements												
T-20	Park-and-Ride Lot at US 78 and US 11 (115 Oak Street, old school central offices)	Transit/Vehicular	2013	\$100,000	2014	\$800,000	2015	\$1,050,000	\$1,950,000	GRTA, GDOT	FTA, GRTA, GDOT	n/a \$0
T-21	Special Events Shuttle	Transit/Vehicular	n/a	\$0	n/a	\$0	Annually	\$0	\$15,000	Private, DDA	Private	DDA, Private \$15,000
T-22	Broad Street Signal Timing	Pedestrian/Roadway Operations	2010	\$75,000	n/a	\$0	2011	\$500,000	\$575,000	GDOT	Bond Fund, "Fast Forward" program	n/a \$0
T-23	Traffic Calming Devices	Roadway Operations	2010	\$4,500	n/a	\$0	2011	\$30,000	\$34,500	City	SPLOST	SPLOST \$34,500
T-24	Multi-Use Trails	Pedestrian/Bicycle	2011	\$375,000	n/a	\$0	2013	\$2,500,000	\$2,875,000	City, Private, PATH Organization	TE, SPLOST, TAD, Private	SPLOST, Private, TAD \$875,000
T-24a	Walton Mills to Avondale Mills	Pedestrian/Bicycle	2011	\$282,500	n/a	Access easement	2013	\$1,750,000	\$2,012,500	City, Private, PATH Organization	TE, SPLOST, TAD, Private	SPLOST, Private, TAD \$612,500
T-24b	Railroad to reserve "rail with trail" (within Study Area only)	Pedestrian/Bicycle	2013	\$112,500	n/a	Private donation	2015	\$750,000	\$862,500	City, County, PATH Organization	TE, SPLOST, TAD, Private	SPLOST, Private, TAD \$262,500
T-25	Downtown Directional Signage (also project O-3)	Roadway Operations	2012	\$0	n/a	\$0	2013	\$75,000	\$75,000	City, DDA	SPLOST, TAD, Private	SPLOST, TAD, Private \$75,000
T-26	Bicycle Racks	Bicycle	n/a	\$0	n/a	\$0	2008	\$800	\$800	DDA, Private	DDA, Private	DDA, Private \$800
T-27	Replace Light Fixtures on Broad St	Pedestrian/Roadway Operations	2007	\$0	n/a	\$0	2008	\$40,000	\$40,000	DDA, City	DDA, City	City, DDA \$40,000
T-28	Parking Deck (250 Spaces)	Vehicular	2014	\$200,000	2015	\$0	2016	\$4,000,000	\$4,200,000	DDA, Private, City	TAD, SPLOST	City, DDA \$4,200,000
T-29	Monroe Directional Signs on US 78, I-20	Roadway Operations	2012	\$0	n/a	\$0	2013	\$100,000	\$100,000	DDA, Private, City	DDA, City	DDA, Private, City \$100,000
T-30	Share-the-road markings on Alcoy Street	Bicycle	2015	\$0	n/a	\$0	2017	\$40,000	\$40,000	City, Private, PATH Organization	TE, SPLOST, TAD, Private	SPLOST, Private, TAD \$40,000
T-31	Share-the-road markings on Midland Street	Bicycle	2011	\$0	n/a	\$0	2013	\$10,000	\$10,000	City, Private, PATH Organization	TE, SPLOST, TAD, Private	SPLOST, Private, TAD \$10,000

\$20,409,590

\$37,772,510

\$32,691,200

Totals: \$1,500,000

N/A: Not Applicable

FIVE YEAR IMPLEMENTATION PLAN

Monroe LCI Study Area: Other Projects

ID	Description/Action	Cost	Year	Responsible Party	Funding Source
Market and Economic Development Projects					
O-1	Brand Identity & Marketing Plan	\$7,000	2008	City, DDA	City/Private
O-2	Town Center Website	\$5,000	2008	DDA	DDA
O-3	Wayfinding (also project T-25)	\$50k-\$75k. Initial Phase = \$20k	Multi-year phased. Plan 2008. Implement 2009-2012	City	City
O-4	Branded Marketing Materials/Additional Collateral	\$15,000	2009-2010	DDA	City/DDA/Private/Chamber
O-5	Market Available Properties	Staff Hours. Marketing production = \$5k	2008-2012	Chamber, DDA	Chamber/DDA/Private
O-6	Create Branded Economic Development Package	Staff Hours. Marketing production = \$5k	2008-2012	Chamber, Walton Dev. Auth/DDA	Chamber/Dev. Auth/Private
O-7	Promote Mixed-Use & Downtown Housing	TBD - part of marketkng plan	2008-2012	DDA, City, Private	DDA/Private
O-8	Recruit Downtown Destination Uses	TBD - part of marketkng plan	2008-2012	DDA	DDA
O-9	Create Partnership to Recruit Business/Development	Staff hours	2008	DDA/City/Dev. Auth	DDA/City/Dev. Auth
O-10	Create a Business Catalyst Program / Incubator	TBD - Lease or construction. Operations	2009	City/County/Private	Private
O-11	Workforce Development & Training	TBD. With incubator	2009	City/County/Private	TBD
O-12	Incentive Programs for New Investment	\$40,000/year	2008-	City, DDA, Banks, Private	City/Private
O-13	Aggressively market available development sites identified in the LCI Plan	Staff Hours. Part of ED marketing	2008-	City/Private	City/Private
O-14	Tax Allocation District (TAD)	Staff hours. \$10,000 TAD Plan	2008	City/County/Schools	City
O-15	Affordable Housing Initiatives	TBD	2009-	City, County	Federal/Private
O-16	Town center Community Improvement District (CID)	Staff hours	2008	City	City
O-17	Participate in National Trust for Historic Preservation's Main Street Program	Staff hours	2008	DDA	DDA
O-32	Monroe Directional Signs on US 78, I-20	\$100,000	2013	City, DDA, Private	DDA

FIVE YEAR IMPLEMENTATION PLAN

Monroe LCI Study Area: Other Projects

ID	Description/Action	Cost	Year	Responsible Party	Funding Source
Parks and Open Space Projects					
O-18	Convert Old Elementary School into Community Center	TBD	TBD	Private, City Partnership	Private
O-19	Issue RFPs to find a new use for Underutilized Schools	TBD	2010	County	City, County
O-20	Public Pool near Existing Library	\$150,000	2010	City, County	City, County
O-21	Install Landscaping Buffer in front of Monroe Utility Warehouse Area	to be provided by City	2008	City	City Public Works Dept.
O-22	Create Park West of Library around Existing Substation	\$225,000	2010	City, County	City, County
O-23	Create Greenway along Creek in Avondale Mills Area	TBD	TBD	Private	Private
O-24	Pocket Park at Church and Madison Streets	\$45,000	2010	Private	Private
Totals:					
Private Development					
O-26	Northern Gateway Redevelopment	\$60,000,000	2015	Private, City Partnership	Private
O-27	Downtown Redevelopment	\$110,000,000	2015	Private, City Partnership	Private
O-28	Avondale and Walton Mills Redevelopment	TBD	2010	Private	Private
O-29	Conversion of East Washington Street public housing to owner-occupied units	TBD	2015	Private, City Partnership	Private
Totals:					
Other Projects					
O-30	Update of local comprehensive plan with LCI recommendations	Staff Time	2008	City, County	City, County
O-31	Zoning code amendments	TBD	2008	City, County, LCI Supplemental Funds	City, County
Total (excluding staff time):					
Totals:					
\$170,722,000					

4.2 Land Use & Zoning Changes

Future land use map and subsequent zoning changes are priority actions for this study. They are intended to codify recommended land uses, urban design standards and streetscape treatments. Currently the City of Monroe has a mixed-use land classification. However, it is only allocated for a few parcels along Broad Street; a major part of downtown is still classified as commercial. Land Use recommendations focus on increasing the mixed-use classification in the downtown core and ensuring appropriate transition to the surrounding neighborhoods.

It is a recommendation of this study to create a mixed-use form based district for the portions of the Study Area identified for long-term redevelopment and generally shown as T4 and T5 on the Framework Plan. At a minimum, the code should include the following:

General:

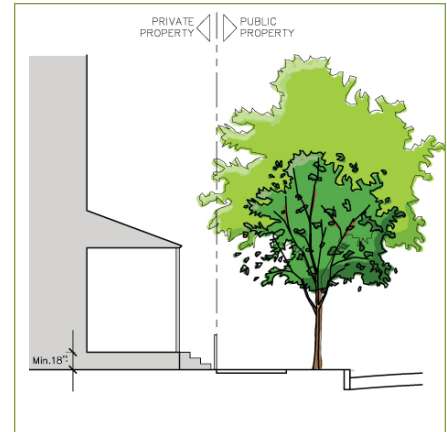
- Sub-areas intended to reflect the transition from more urban to less urban, as envisioned in the frame work plan.
- By-right mixed-use development.
- Increased residential permission.
- Restrictions on commercial uses.
- Sign standards.
- Open space requirements for major developments.

Transportation:

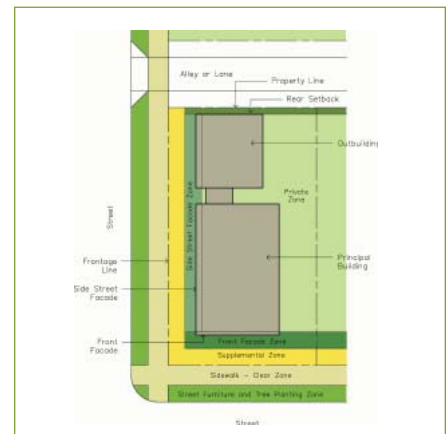
- Requirements for side or rear parking and access.
- Allowances for shared parking.
- Reduced parking ratios.
- Maximum block size and connectivity requirements.
- Sidewalk requirements.

Design:

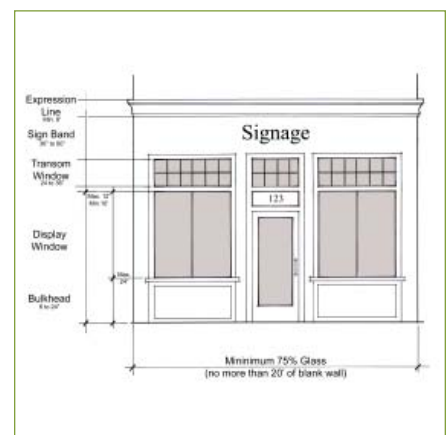
- Requirements for appropriate building frontages, or relationships of building to street.
- Reduced setbacks.
- Compatible architectural requirements.
- Material requirements.
- Storefront standards on key shopping streets.



The code should address lot frontage types



The code should address how buildings sit on their lots to ensure a historic compatibility



The code should include standards for storefront design.

4.3 Population & Employment Projections

It is projected that the built-out Framework Plan will add population and jobs to the Study Area as follows:

2018 Population and Employment

It is estimated that 3,004 residents currently live within the Study Area. The recommended land uses will increase the number of residents to 3,361 by 2013 and 4,862 by 2018.

Figure 4.2: Study Area Population: 2008 - 2018

	Single-Family	Townhomes	Multifamily	Total
January 1, 2008				
Housing Units	900	0	274	1307
Average Household Size	2.56	2.56	2.56	2.56
Population	2,304	0	700	3,004
Plan - 2013 Estimate				
Average Household Size	2.55	2.55	2.55	
Net New Units	100	20	20	140
Net New Population	255	51	51	357
Total Population	2,559	51	751	3,361
Plan - 2018 Estimate				
Average Household Size	2.5	2.35	2.25	
Net New Units	300	200	125	625
Net New Population	750	470	281	1,501
Total Population	3,309	521	1,032	4,862

Currently 1,377 employees are estimated to work within the Study Area. When the recommended land uses are factored in, 190 new jobs will be added by 2013 and 145 additional jobs by 2018.

Figure 4.3: Study Area Employment: 2008 - 2018

	Commercial	Office	Total
January 1, 2008			
Employees	302	1,075	1,377
Plan - 2013 Estimate*			
Net New Square Footage	75,000	41,000	116,000
Net Employees	91	99	190
Total Employment	393	1,174	1,567
Plan - 2018 Estimate			
Net New Square Footage	60,000	30,000	90,000
Net Employees	73	72	145
Total Employment	466	1,246	1,712

* Assumes 40,000 sf grocery store on North Broad Street

2033 Employment and Population

Estimating employment and population growth beyond 10 years is difficult on the micro-level. Real estate and economic trends are complex and subject to change. Although the recommended land use plan is largely based on a 10-year build-out, longer-term forecasts can be made based on real estate cycles and the assumption that some facilities will be redeveloped.

Figure 4.4: Estimated Change in Population: 2008 - 2033

Year	Single-Family Residents	Townhome Residents	Multifamily Residents	Total
2008	2,304	0	700	3,004
2013	2,559	51	751	3,361
2018	3,309	521	1,032	4,862
2023	3,309	599	1,187	5,095
2028	3,309	689	1,365	5,363
2033	3,309	792	1,570	5,671

**Assumes a 15% increase every five years in townhouses and multifamily residents*

Figure 4.5: Estimated Change in Housing Units: 2008 - 2033

Year	Single-Family	Townhomes	Multifamily	Total
2008	900	0	274	1,174
2013	1,000	20	294	1,314
2018	1,300	220	419	1,939
2023	1,300	253	482	2,035
2028	1,300	291	554	2,145
2033	1,300	335	637	2,272

**Assumes a 15% increase every five years in townhouses and multifamily*

Figure 4.6: Estimated Change in Employment: 2008 - 2033

Year	Commercial	Office	Total
2008	302	1,075	1,377
2013	393	1,174	1,567
2018	466	1,246	1,712
2023	503	1,345	1,849
2028	544	1,453	1,997
2033	587	1,569	2,156

**Assumes an 8% increase every five years in office and commercial*

4.4 Access Management Plan

As an LCI corridor study, the reduction of existing and future curb cuts along North Broad Street is a key element of this study's recommendations. Curb cuts and the driveways they server are detrimental to effectiveness of North Broad Street in serving both vehicular and pedestrian needs because they increase potential conflict points between turning vehicles, other vehicles, and pedestrians on the sidewalks.

The following is a summary of recommendations contained in Section 3: Recommendations which support access management.

Access Management-Supporting Policies

- Limit curb cuts on major streets and require access from side streets. (page 3:16)
This policy calls for reducing curb-cuts on Broad Street and Spring Street in favor of utilizing existing side streets for parcel access. Monroe's existing small and interconnected blocks facilitate this.
- Raise the curb, repair the gutters, and consolidate driveways as part of all sidewalk and streetscape projects. (page 3:17)

Access Management-Supporting Projects

- Install pedestrian facilities on both sides of North Broad Street from Walton Street to US 78. (T-2; page 3:17)
This project includes driveway consolidation, among other elements.
- Install pedestrian facilities on both sides of South Broad Street from Davis Street to 2nd Street. (T-1; page 3:17)
This project includes driveway consolidation, among other elements.

Concept Plans

In addition to the above policies and projects, the Concept Plans shown on pages 3:5, 3:7, and 3:9, and provide graphic illustration of access management techniques along major streets. Elements of these plans supporting this include:

- The use of common driveways and parking area for commercial uses, rather than those serving single businesses.
- The use of rear alleys or lanes, which remove driveways form the street and provide inter-parcel access.
- The use of side streets to access driveways and businesses.
- The creation of an interconnected street grid within developments, which reduces the need to drive on major arterials for local trips.

Zoning Revisions

Lastly, the effectiveness of access management will depend on its codification. As such, those elements identified above that affect private property redevelopment should be incorporated as requirements into the proposed zoning code modifications (project O-31).

4.5 Consistency with LCI Components

The Monroe Town Center LCI Study and the recommendations contained herein are consistent with the 10 components of the LCI program as identified below:

1. Efficiency/feasibility of land uses and mix appropriate for future growth including new and/or revised land use regulations needed to complete the development program.

The land use recommendations call for the introduction of increased housing options in Downtown Monroe, the Mills of Monroe area, and on North Broad Street. These include above-shop housing in new mixed-use buildings, offices, live/work units, multifamily buildings and townhouses. Single-family homes are located in close proximity to these housing options, and are also preserved in the adjacent neighborhoods. The plan also calls for expanding the offerings of: small neighborhood commercial uses; offices; and redeveloped industrial uses.

In addition, the plan will be followed by a zoning revisions to achieve the design and mixed-use land use patterns contained herein.

2. Transportation demand reduction measures.

The plan proposes reducing auto-demand by shifting some auto trips to pedestrian and bicycle trips via a multifaceted effort to: locate different land uses within walking distance; improve pedestrian facilities; improve transit; improve bicycle facilities; and establish land use patterns that could support future transit.

3. Internal mobility requirements, including traffic calming, pedestrian circulation, transit circulation, and bicycle circulation.

One of the central tenets of this study is to make it advantageous for drivers to drive responsibly through improved signal timing, roadway pavement upgrade, and psychological cues that make them aware that they are in an downtown area where multi-modal transportation is desired. By doing so, the plan improves mobility for drivers and accessibility for non-drivers.

Accessibility for non-drivers is improved by: building new tree-lined sidewalks along key streets; establishing sidewalks standards for new development; creating a bicycle network; supporting future efforts to provide transit service; and improving pedestrian and bicycle connectivity.

4. Mixed-income housing, job/housing match and social issues.

The Study Area currently contains a wide range of housing options, but the community has recently seen an increase in starter homes and the number of rental units. The plan proposes preserving existing housing options and introducing new housing types (identified in item 1 above) to the Study Area. Neighborhood preservation and rehabilitation efforts are targeted at existing neighborhoods directly adjacent to downtown.

The plan also proposes increasing employment options within walking distance of existing and proposed housing. New employment areas will be found: in the existing core of downtown due to infill development opportunities; north of downtown as part of the North Gateway Plan; south of downtown as part of the Mills of Monroe redevelopment plan's adaptive re-use of the mills as new employment space. These will benefit both existing neighborhoods and new housing as well.

5. Continuity of local streets in the study area and the development of a network of minor roads.

Downtown Monroe has a strong network of local streets and minor roads. The plan identifies a potential east-west connection between Shamrock Drive and 5th Street that should be implemented if a community-supported design can be identified. Opportunities for new, private streets and alleys with development of Avondale Mills are also identified, as are maximum block size and connectivity requirements in the proposed zoning revisions.

6. Need/identification of future transit circulation systems.

The planning process identified some long-term opportunities for improving transit in the Study Area. The plan recommends a new park and ride lot at an existing unused school site. Special events transit is also recommended in the future.

7. Connectivity of transportation system to other centers.

The Plan recommends potential connections for commuter service for connecting Monroe to Athens and Atlanta in proximity to US 78.

8. Center development organization, management, promotion, and economic restructuring.

The Study Area is marked by a strong community and local merchant support. The plan supports existing efforts by local businesses to market their community as a pedestrian-oriented small town, utilizing their respective strengths as historic, pedestrian-oriented centers. It also calls for enhancing the capacity of the existing DDA by creating a community improvement district (CID), which would provide them with a revenue stream for marketing programs.

The introduction of new housing near existing and proposed commercial or mixed-use nodes will also support retailers by increasing the potential customer base.

9. Stakeholder participation and support.

The Study process included extensive public involvement in the form of an on-line and in-person image preference survey, five community meetings, stakeholder meetings, and extensive interviews. In addition, the consultants met one-on-one with a variety of groups, including merchants and developers.

10. Public and private investment policy.

The plan calls for the City of Monroe to continue their efforts to direct investment into Downtown Monroe via public improvements. The plan also supports future growth of SPLOST funded projects through the creation of major tax generating uses in the Study Area. It also recommends creation of a tax allocation district (TAD) to provide another local funding option.

Town Center LCI Market Analysis

For

The City of Monroe, Georgia

*Prepared for the City of Monroe, Georgia in conjunction with the
Tunnell-Spangler Walsh & Associates Team*

by:

Arnett Muldrow & Associates

PO Box 4151

Greenville, SC 29608

864.233.0950

www.arnettmuldrow.com

November 6, 2007

Table of Contents

1.0	Introduction.....	2
2.0	Market Analysis	3
2.1	Market Definition	3
2.2	Retail Market Analysis	18
2.3	Market Analysis Observations	29
3.0	Demographics and Market Segmentation.....	32
3.1	Demographics.....	32
3.2	Market Segmentation.....	39
3.3	Demographic & Segmentation Observations	45
4.0	Housing Market.....	46
4.1	Housing Unit Growth.....	46
4.2	Primary Trade Area Housing Demand	48
4.3	Current Housing Market.....	51
4.4	Housing Market Observations.....	54
5.0	Employment Snapshot.....	55
5.1	Employment Totals and Labor Force.....	55
5.2	Commuting Patterns	57

1.0 Introduction

In an effort to better understand the overall market and economic development opportunities of Monroe and the LCI study area, a market analysis was conducted looking at retail, business, and housing potential. All data presented in this section is relevant specifically to the market for Monroe Town Center and its trade areas. This analysis includes:

A **market definition** exercise that establishes the true geography of Monroe Town Center's local trade areas;

A **retail market analysis** that presents opportunities to expand Monroe's market base as well as specific demand for new or expanded retail and business offerings within the Town Center area;

A **demographics and market segmentation** analysis that takes the local trade areas and presents demographic trends while providing a better understanding of the makeup of the various segments of the market.

A **housing market analysis** that projects demand for new housing units, price points, and housing types over the next ten years within Walton County and the primary trade area; and

An **employment snapshot** that outlines the most current employment numbers and indicators in Walton County and the primary trade area.

This market analysis provides the initial data to support many of the opportunities reflected in the urban design phase of this LCI study. Ultimately, it will be used by the City of Monroe and other economic development agencies to recruit underrepresented retail sectors and enhance the business mix in order to better meet the needs of the community.

2.0 Market Analysis

This chapter presents the findings of the market research for Monroe. It provides detailed analyses that will identify the primary business and housing opportunities for the community as well as the LCI study area. Ultimately, the data can be used to recruit new businesses and expand the overall customer base for downtown Monroe through market positioning and target marketing. The market analysis also provides customer data on the various segments of the retail market (local services, retail, restaurant, personal care, etc) and presents the market variations from the different business clusters in the Monroe town center.

The methodology is designed to provide a snapshot of trade patterns in the community. Because it is a snapshot of the retail market for the Monroe LCI town center geography as a unit, this study does not necessarily reflect the exact trade patterns that each individual business might see through the course of the year and does not substitute for thorough market research for any specific business. For instance, a downtown restaurant would have distinct overall market characteristics different from an office supply store or law office. However, the information provided does offer valuable insight into the overall patterns, retail trade areas, and visitor traffic for the Monroe town center. This data will become valuable to the various agencies conducting economic development and marketing activities including the Town of Monroe, Downtown Monroe, Walton County Economic Development, Chamber of Commerce, as well as individual merchants and property owners. Ultimately, the data and its conclusions are incorporated into the urban design recommendations of the LCI Study creating a market-based master plan.

2.1 Market Definition

Before beginning the market analysis, the retail trade areas for Monroe have to be established. In order to do this, a zip code survey of customers must be held by local businesses. The zip code survey serves several, equally important purposes. First, it engages local businesses in the process. Quite often, independently owned businesses do not track their customer base and therefore have no mechanism to evaluate the successes of their marketing efforts. Secondly, the survey determines both a primary and secondary trade area that is based on true consumer habits and shopping patterns. This is critical to the assessment process and provides the baseline data for which the more detailed retail leakage and shares analyses will be conducted. Finally, it establishes Monroe town center's place in the regional market, as well as ascertaining the depth of the visitor market in the community.

2.1.1 Conducting the Zip Code Survey

Seventeen businesses within the LCI study area tracked customers during the week of August 17th through the 23rd. Businesses were provided with a standard form to record zip codes and asked to keep a log of their customers. Each business recorded all customers through the end of the week or 200 customers; whichever came first. For the two Monroe zip codes, customers were asked whether they live *inside* or *outside* of the municipal limits of Monroe. The two Monroe zip codes (30655 and 30656) encompass an area much larger than the town limits, including those growth areas closer to Loganville, Athens, and Winder. By breaking the geography of these two zip codes down further, we can determine whether or not residents of the Town are more loyal to downtown businesses, and how relevant downtown is to nearby growth areas.

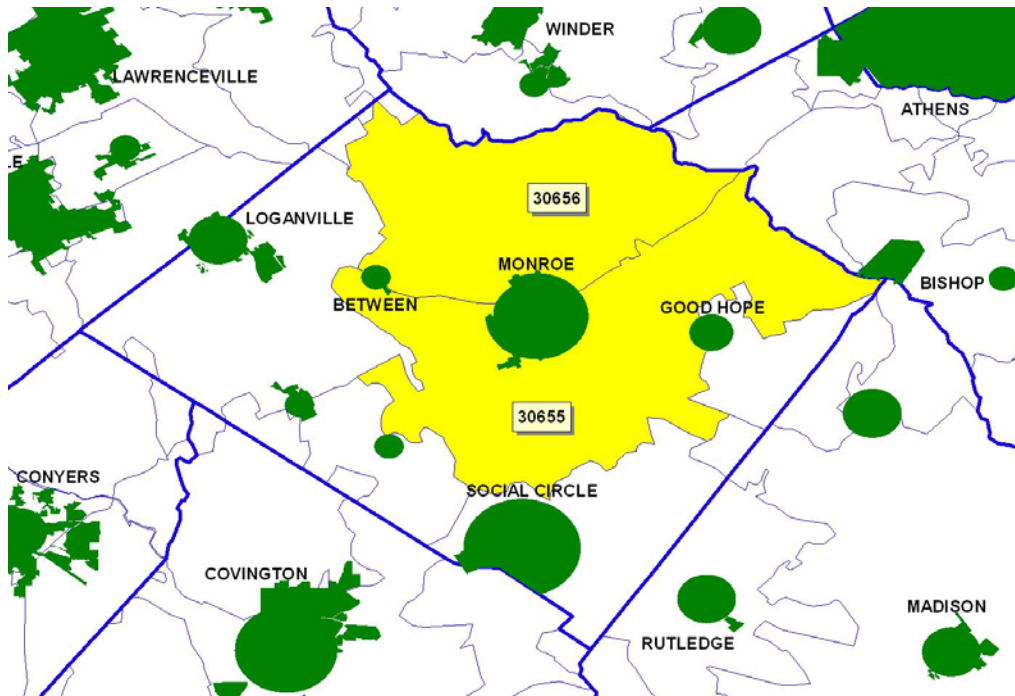


Figure 1: Monroe Zips 30655, 30656

Zip Code Survey of Customers
MONROE, GEORGIA

August 17 - 23

Business Name _____

- 1 - Please record the **residence zip code** of customers in the spaces below.
- 2 - Stop if you complete 200 zip code records, or August 23rd, whichever comes first.
- 3 - Record **only one customer** per individual numbered row.

*****If resident lives in 30655 or 30656
ask if they live IN or OUT of the CITY OF MONROE**

Cust. No.	MONROE		MONROE		Social Circle	Loganville	Good Hope	Bethlehem	Covington	Oxford	Other Zips
	30655 IN	30655 OUT	30656 IN	30656 OUT	30025	30052	30641	30620	30014	30054	Please record the 5 digit zip code
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
27	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 2: Zip Code Survey Instrument. Arnett Muldrow & Associates.

It should be noted that the purpose for this survey is simply to determine where customers are coming from. Therefore, it does not ultimately matter what types of businesses are included. Some have more visitor traffic than others, so it is important to try and get a variety of business types to participate. This was certainly the case in Monroe, and there was enough data to analyze by business cluster as well as the whole.

For instance, there was enough data from various retail clusters to analyze the data by category, including:

- § **Restaurants & Specialty Foods**
- § **Home related** (furniture, home furnishings, antiques)
- § **Local oriented** (service, personal care, grocery, office)
- § **Specialty** (gifts, book stores, other specialty)

2.1.2 Zip Code Survey Results

The results of the zip code survey are listed below.

Survey Week – August 17th – 23rd:

- 17 businesses were tallied. 11 were in the downtown core while the remaining six were outside the core but within the LCI study area. Business types included:
 - Furniture
 - Children Books
 - Gifts
 - Grocery
 - Health Food
 - Children Clothing
 - Antiques
 - Florist
 - Electronics
 - Interior Design/Framing
 - Printing
 - Restaurant
 - Jewelry
 - Auto Service
 - Hardware
- During the one-week period, participating businesses recorded 1176 total customer visits with an average of 69 customers per store. This varied widely from store to store with the high being 200 and the low being 4.
- This represented customers from 93 unique zip codes.
- Customers came from eight unique states including GA, PA, VA, FL, AL, IN, IA, IL.

The following tables show the results of the week's survey as compared to peer communities in which Arnett Muldrow has performed similar analyses. While this analysis is somewhat uncontrolled due to this variation in the amount of data, it still gives a fair comparison of the visitor markets and overall depth of the customer base.

More tourism and visitor oriented communities (Leesburg, VA; Newberry, SC; Salisbury, NC) show significantly more visitors than others and are represented on the left side of the chart. Other communities that have less unique customer visits are represented on the right side of the chart (Albemarle, NC; Hinesville, GA). These communities would be more locally oriented. Monroe is identified in red in both charts.

The first chart shows total unique zip codes for each community. Monroe had 96 unique zips placing it in the mid-range but slanted towards serving a more local customer base. Compared to other communities near larger urban areas:

- Shelby NC (19k population, 45 minutes from Charlotte) – 100 zips
- Greenwood, SC (20k pop, 1 hour from Greenville, Columbia) – 63 zips
- Hinesville, GA (30k pop, 30 minutes from Savannah) – 49 zips

The second chart compares unique states recorded in each community. Downtown Monroe had customers from 8 unique states placing it farther to the right side of the chart suggesting a smaller visitor base. This is likely due to its position in the state of GA, between larger urban areas and without an interstate. Peer communities showed:

- ∞ Shelby – 11 states
- ∞ Hinesville – 13 states

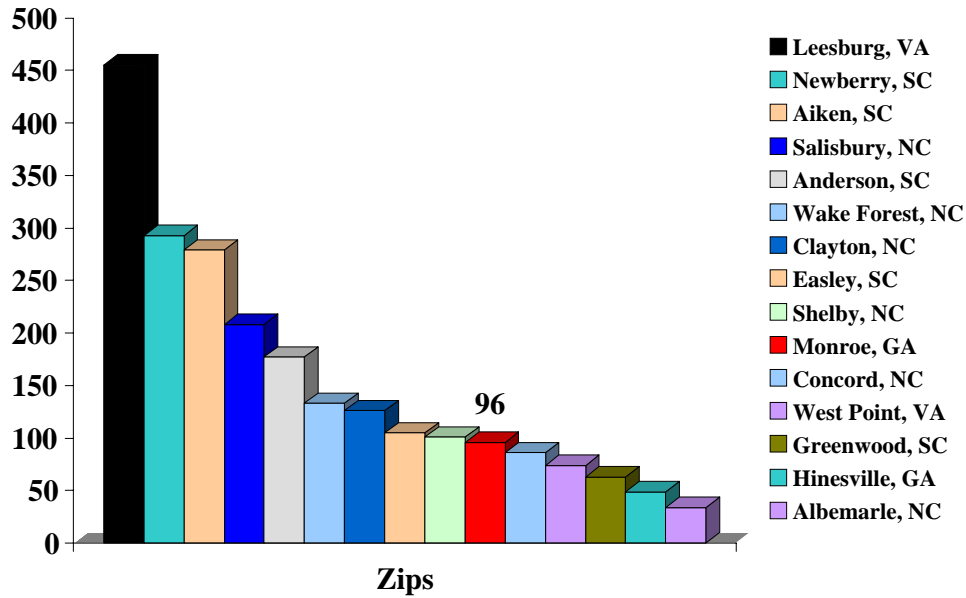


Figure 3: Comparison of unique **zip codes** recorded during zip code survey

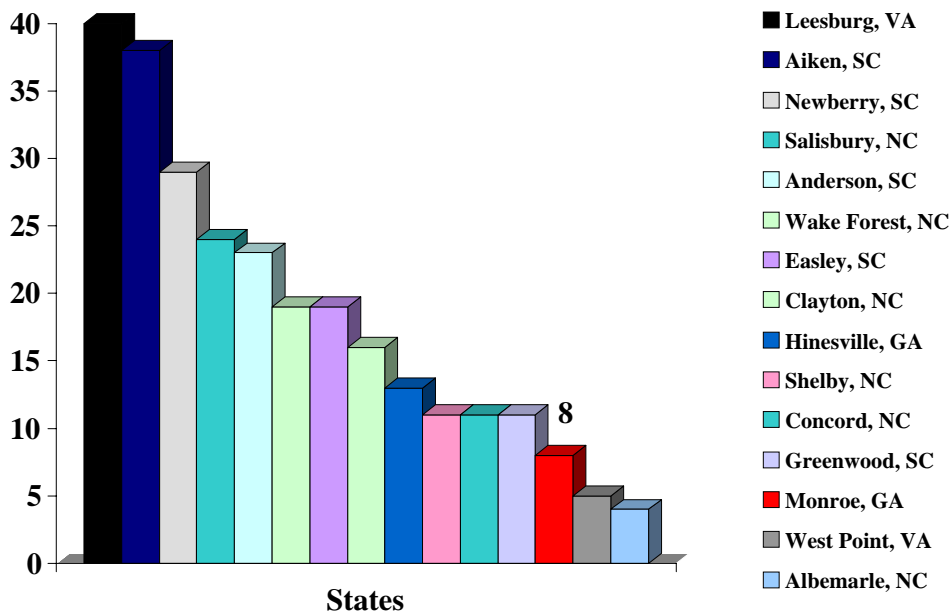


Figure 4: Comparison of unique **states** recorded during survey period

This data suggests that Monroe serves primarily a customer base from the immediate region. Of course, this only looks at the presence of unique data and considers each zip code equally. It does not look at the *frequency* of the visits. For example, while there was one visit from a customer residing in Sioux City, Iowa, there were 677 from the two Monroe zip codes. Both of these areas represent a unique record in the data above.

The data shown below presents a deeper look into customer visits in terms of the overall local, regional, and visitor markets.

During the survey period:

- 57% of customers reside in the two Monroe zips.
- Approximately 40% of the customers came from the primary Monroe zip code 30655. Another 17% came from second Monroe zip to the north 30656.
- Next was Loganville (30052) with 116 visits, or 10% of the customer base, and Social Circle (30025) with 6%, or 66 visits.
- About 76% of all customers come from Walton County zips (Monroe, Loganville, Social Circle, Good Hope). This figure is approximate due to the fact that portions of the Covington zip are in Walton while parts of the Loganville zip are in Gwinnett.
- Only 1% of customers came from outside of the state of Georgia.

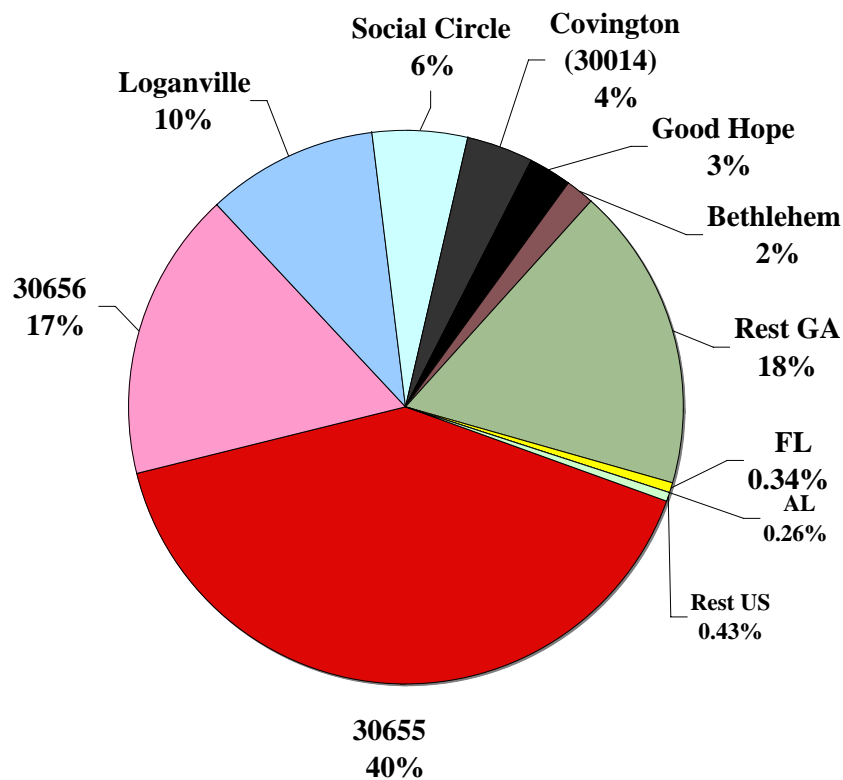


Figure 5: Percentage of Customer Visits during survey period.

A Second Look:

- 29% of the customer visits were from the municipal limits of Monroe.
- 88% of customers reside in Walton County or adjacent zip codes and represent the immediate region.
- In terms of regional market penetration, Madison had 17 visits, Athens had 18, and only 5 customers came from Atlanta.
- 11.8% of customers could be considered “visitors”, either from outside the immediate area but within the region (ie Atlanta visitors), or tourists.

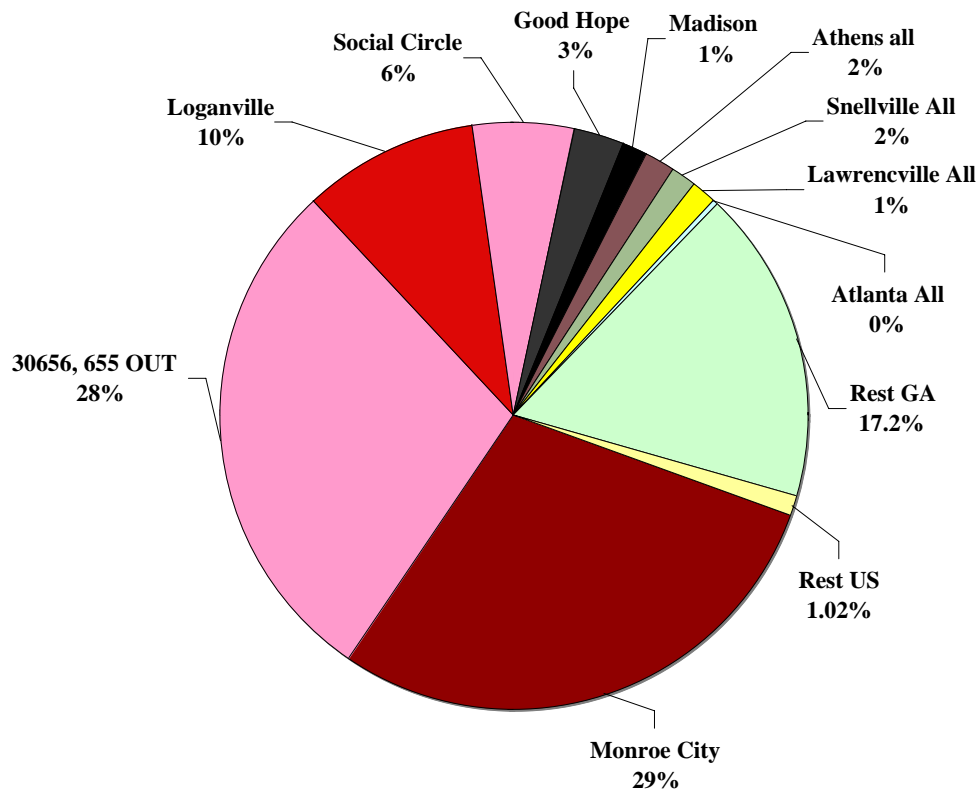


Figure 6: A Second Look. Percentage of Customer Visits

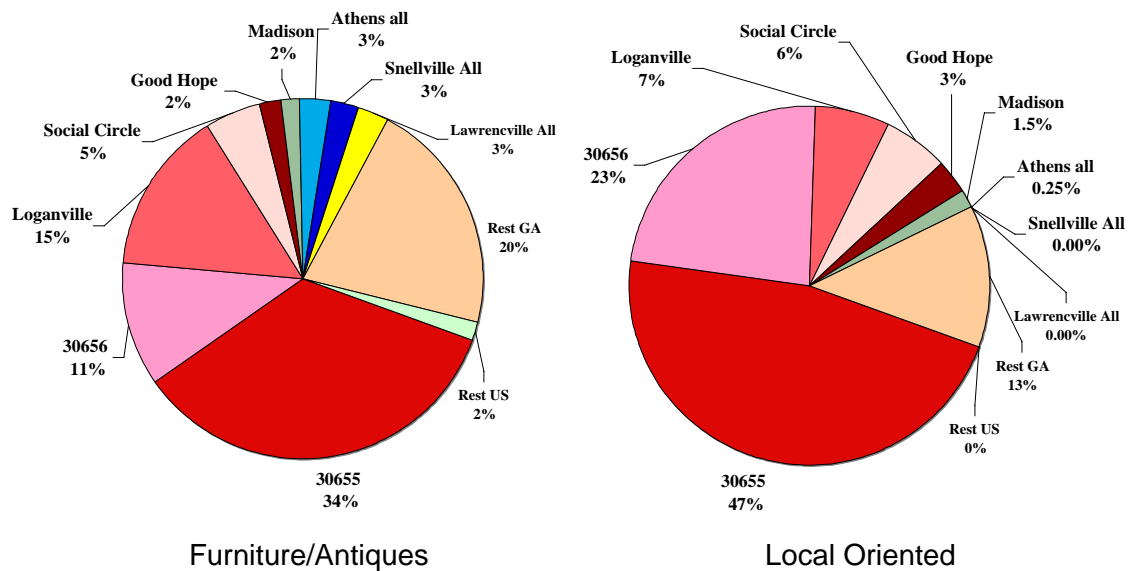
2.1.2.1 Zip Code Survey by Business Cluster

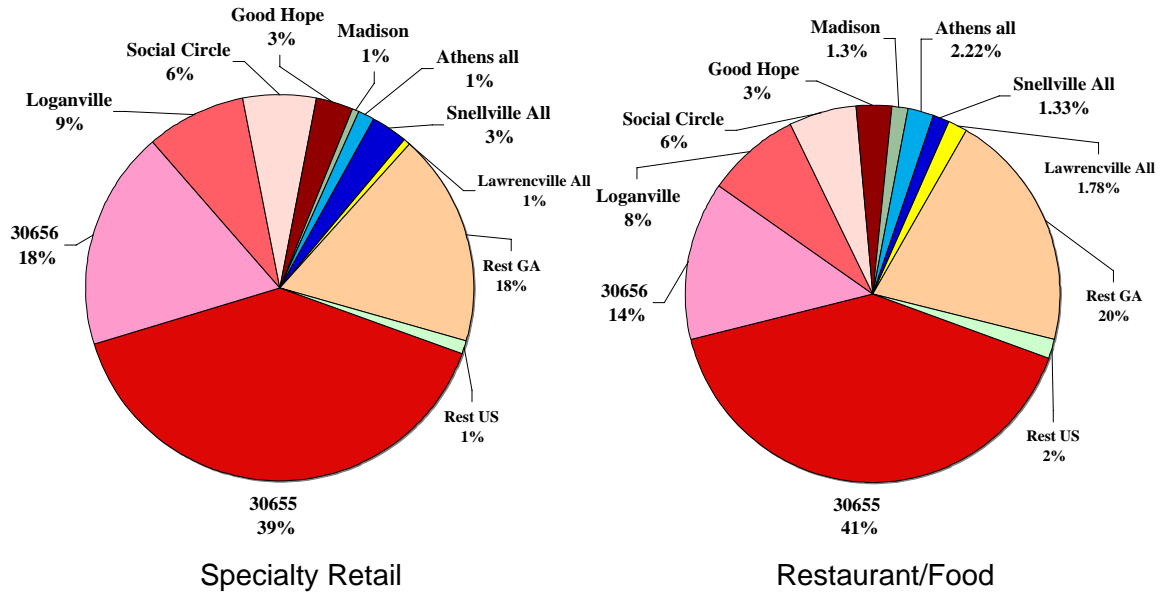
There was enough clustered information to compare the data by the various types of participating businesses. For the purposes of this section, we will look at characteristics of four different business types. All told, there were 17 businesses tallied broken down by the following areas:

- 6 – Furniture & Antiques
- 2 – Restaurant & Food
- 4 – Specialty Retail
- 5 – Local Oriented or Service related

		ALL	Furniture Antiques	Local	Specialty	Rest/ Specialty Food
Georgia	All	99.0%	98%	100%	99%	98%
Monroe Town		28.9%	21.4%	40.2%	19.5%	28.4%
Rest Walton		46.8%	46.6%	45.4%	56.1%	42.7%
30620 Bethlehem		1.7%	1.6%	2.0%	3.0%	0.4%
30014 Covington		3.8%	2.9%	2.5%	3.7%	8.0%
30054 Oxford		1.4%	1.6%	2.2%	0.6%	0.4%
30650 Madison		1.4%	1.8%	1.5%	0.6%	1.3%
30680 Winder		0.9%	1.3%	0.5%	0.6%	1.3%
All Athens		1.5%	2.6%	0.2%	1.2%	2.2%
All Snellville		1.5%	2.6%	0.0%	3.0%	1.3%
All Atlanta		0.4%	0.0%	0.0%	0.6%	1.8%
All Lawrenceville		1.4%	2.9%	0.0%	0.6%	1.8%
Georgia	All other	9.1%	13.3%	5.5%	9.1%	8.4%
Florida	All	0.3%	0.8%	0.0%	0.0%	0.4%
Alabama	All	0.3%	0.0%	0.0%	0.6%	0.9%
All Others US	All	0.4%	0.8%	0.0%	0.6%	0.4%
		100.0%	100.0%	100.0%	100.0%	100.0%

Figure 7: Customers by business type





- Furniture and antique stores have the broadest overall market and depend the least on Monroe customers. Still, Monroe zips represented 45% of the customer base for furniture and antiques, representing a significant market. 67% of furniture and antiques customers came from Walton County.
- Antique stores, when pulled out of the category above, show only 38% of its market from Monroe zips and only 61% from Walton County. 24% of the customers to antique stores could be considered “visitors”.
- Local oriented retail, as would be expected, had the tightest market area with 86% of its customers coming from Walton County. 7 out of 10 customers were from Monroe zips.
- Specialty Retail and Restaurants had very similar trading patterns. Overall, restaurants had the broadest regional market, meaning they are pulling more customers from within the region. This is typical of restaurants in other communities. On the other hand, restaurants didn’t have as many visitors as specialty retail, furniture, and antiques.

Not all businesses performed the same. The table below shows the percent visitor by individual participating business. For the purposes of this chart, a “visitor” would be a customer from outside of Walton County and adjacent zip codes. This customer could be a regional visitor (from Atlanta), or a tourist from another state.

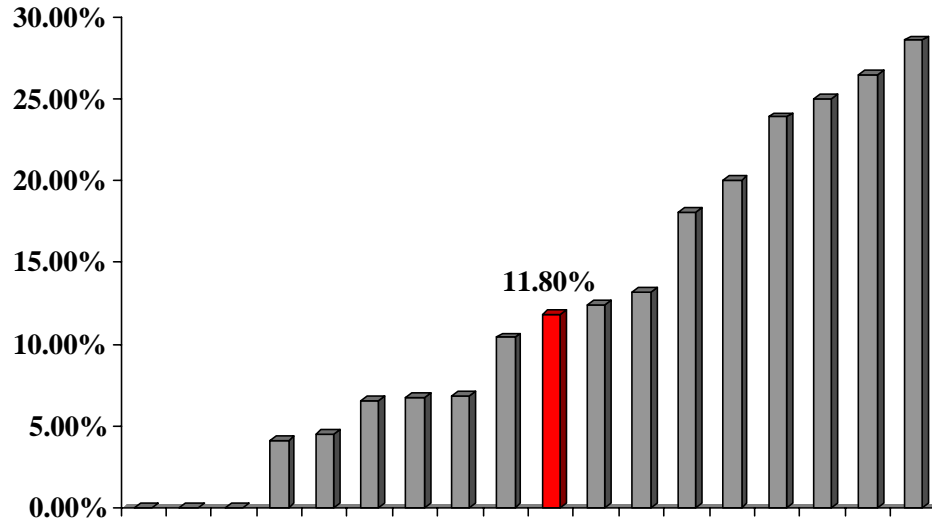


Figure 8: Percent Visitor by Individual Business

There was an average of 11.8% “visitor” base ranging from three businesses having no visitors to one business having 28.6% visitors. It should be noted that 11.8% visitor base is not out of the ordinary. This is particularly the case in Monroe considering the nearby competitive markets (Madison, Athens, Atlanta, etc) as well as the lack of an interstate. On the other hand, nearly 9 out of 10 customers came from the immediate region.

2.1.3 Trade Area Definitions

The zip code geography is used to define the primary and secondary trade areas. However, zip codes are all different sizes and populations and therefore cannot simply be analyzed by the number of visits per zip code. For example, there were 48 total visits from Covington and 31 visits from Good Hope. This may seem to suggest that Covington represents a stronger market than Good Hope. However, the total population of Covington zip codes (those that were recorded in Monroe's survey) is over forty-five times that of the population of the Good Hope zip code. There is a much deeper penetration into the Good Hope zip code (relative to its population) than all of Covington. Therefore, the market penetration cannot be determined simply by the total number of visits, but by visits in relation to population.

The table below shows customer visits per 1,000 population for each of the highest representative zip codes.

Zip	Area	Population	Visits	Visits/1000 Pop
30655	Monroe	21,228	477	22.47
30641	Good Hope	1,688	31	18.36
30656	Monroe	14,407	198	13.74
30025	Social Circle	9,372	66	7.04
30621	Bishop	4,261	11	2.58
30052	Loganville	53,595	116	2.16
30620	Bethlehem	9,579	20	2.09
30663	Rutledge	3,557	6	1.69
30650	Madison	11,440	17	1.49
30054	Oxford	11,708	17	1.45
30014	Covington	36,245	45	1.24
All	Covington	78,153	48	0.61
All	Athens	59,022	18	0.30
All	Snellville	74,477	18	0.24
All	Conyers	83,227	10	0.12
All	Lawrenceville	289,705	16	0.06
All	Decatur	148,332	6	0.04
All	Atlanta	125,913	5	0.04
All	Monroe	35,635	677	19.00
Monroe IN		12,663	340	26.85
Monroe OUT		22,972	335	14.58

Figure 9: Primary and Secondary Trade Area. Visits per 1000 Population. Source: Arnett Muldrow Associates & Claritas, Inc.

Because the number and type of participating businesses vary from community to community, there is no specific number that determines the primary and secondary trade

areas. However, when comparing visits per 1,000 population in relation to the specific time frame in which the survey was conducted, breaks in the visits/1000 will begin to emerge. Whenever these breaks become significant, this determines the differences in trade areas.

By this measure, Monroe's **primary retail trade area (PTA)** is defined as the following four zip code geographies. These zip codes had over seven customer visits per thousand residents.

- | | |
|----------------|-----------------------|
| 30655 – Monroe | 30641 – Good Hope |
| 30656 – Monroe | 30025 – Social Circle |

Customers from these zip codes represented **60%** of the total visits during the survey period.

Three additional zip codes listed in the preceding table had over two visits per thousand residents. These geographies represent Monroe's **secondary trade area (STA)**:

- | | |
|-------------------|--------------------|
| 30621 – Bishop | 30052 – Loganville |
| 30620 – Bethlehem | |

Customers from these zips represented **18%** of the total visits during the survey period.

The map below illustrates the primary (orange) and secondary (purple) trade areas for Monroe.

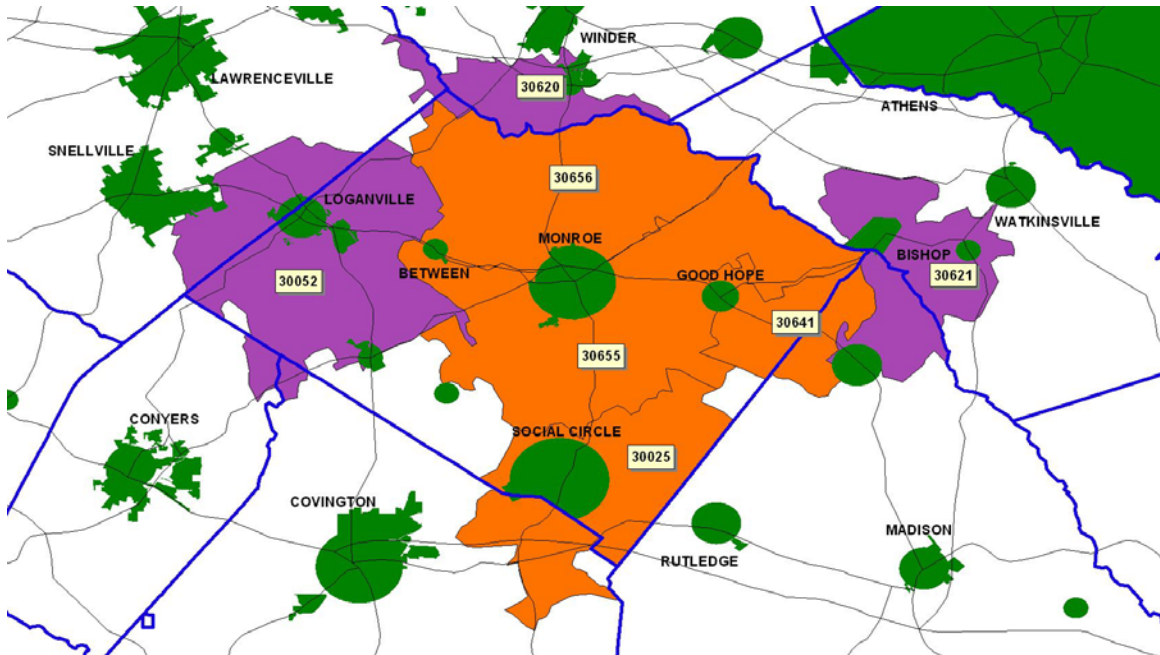


Figure 10: Monroe Primary and Secondary Trade Areas

Downtown Monroe is performing fairly well in three other zip codes shown below in light blue. These areas are not quite part of the local trade areas, but do represent the regional reach of Monroe's customer base. This area pulls to the south towards Covington and Madison, but away from the northern competitive markets of

Lawrenceville and Athens. **85%** of downtown Monroe's customer base comes from the geography shown in orange, purple, and light blue below.

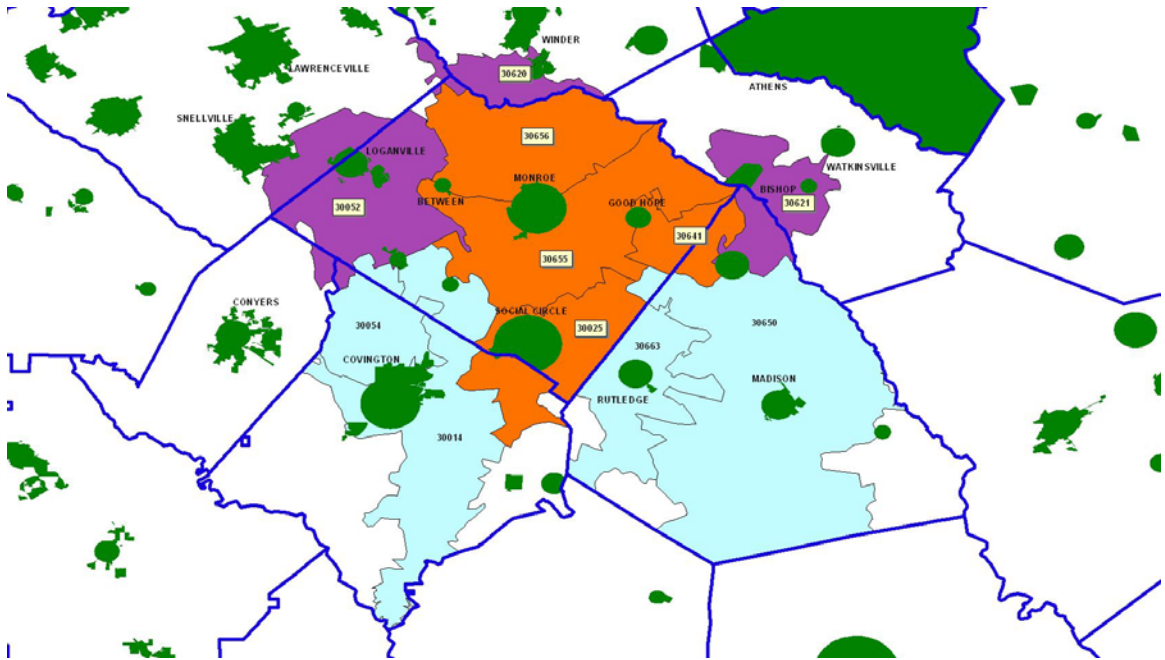
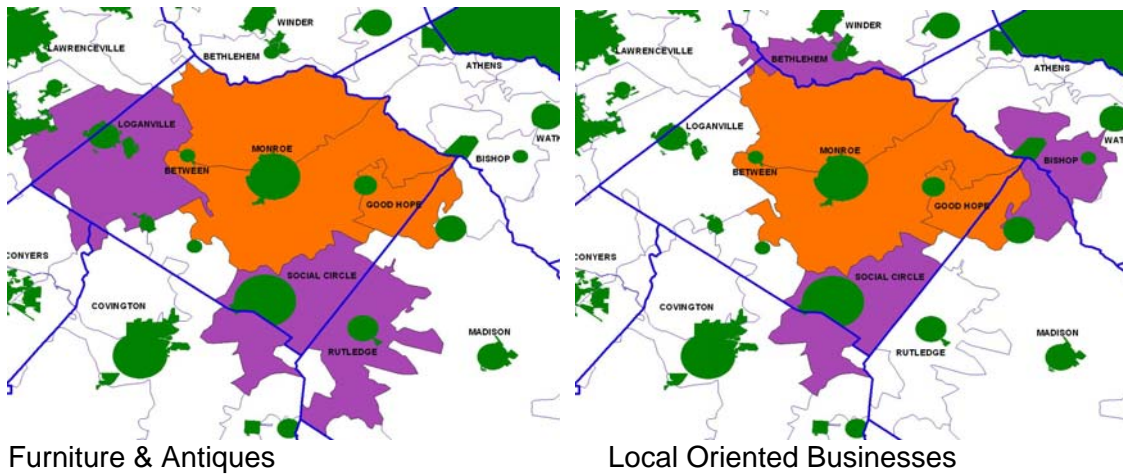
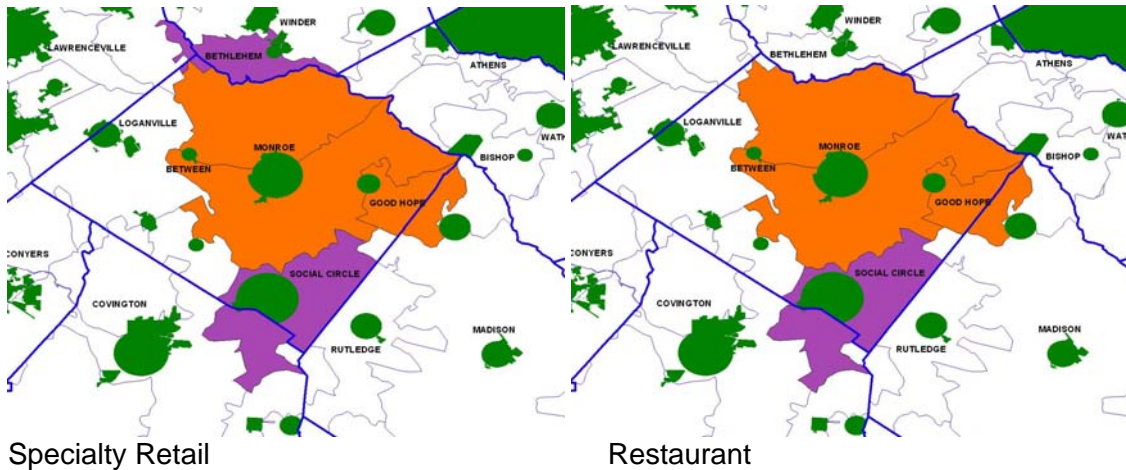


Figure 11: Monroe Town Center Trade Areas

As shown earlier with the results of the zip code survey, the trade areas for downtown Monroe vary based on the different cluster of businesses. These are shown below.





- “Furniture/Antiques” have the broadest regional market in terms of numbers, and pulls to the south and west including primary growth corridors and population centers. These uses have the largest numbers of visitors as well.
- “Local” oriented businesses pull from Monroe, Social Circle and Bishop to the east. These businesses are not very relevant to Loganville area, likely because of concentration of retail in Loganville as well as its proximity to Lawrenceville.
- “Specialty” retail has similar pattern, and primarily confined to Monroe, Good Hope, and Social Circle. This is somewhat unusual as specialty retailers typically have broader pull. Of course, these geographies represent the *local* trade areas and specialty retail did have a healthy visitor market and does not depend solely on local trade areas.
- “Food” has the tightest trade area. There was one restaurant return a survey, so the data represents a very small sample and likely not indicative of the restaurant market. Typically, restaurants have the broadest pull reaching locals, regional visitors, and tourists alike.

2.1.4 Additional Observations of the Market Definition Study

- Monroe has strong local market base with 57% of the customers coming from Monroe zips. 76% of all customers come from Walton County, and 86% from Walton County and adjacent zip codes.
- Overall, Trade Areas cover most of Walton County (PTA/STA = 78%) and seem to pull to the south as the Madison and Covington zips, among others, are performing relatively well. All things considered, Monroe has a relatively tight trade area suggesting that there are strong regional retail magnets affecting its market.
- There is very little penetration into the nearby competitive markets of Athens, Atlanta, and Gwinnett County. Morgan County was respectable which is very positive considering Madison should be one of Monroe's strongest competitors.
- There are not a great number of visitors (11.8% overall), and there is no evidence of any visitor browsing. Whenever a unique zip code shows up in more than one shop, that visitor is a browser. There were no evident cases of visitor browsing which is a bit of a concern considering the types of retail clusters that Monroe has that typically support browsing (antiques and furniture).
- Customers from the City of Monroe are more loyal to local shops as those outside of town but still in Monroe zips. Residents from the town are almost twice as likely to shop in downtown than their counterparts in the same zips.
- The trade areas differ with the varying cluster types with furniture and antique stores having the broadest market and highest number of visitors.

2.2 Retail Market Analysis

Monroe is a retail center serving the geographic markets defined above. In this section, the retail market will be examined to identify potential opportunities for business growth through two key studies:

1. A retail leakage analysis that will look at the primary and secondary trade areas to see how much money is “leaking” from the area to stores in other areas. From this, a “capture scenario” will be developed to illustrate how much retail space could potentially be brought back into Monroe based on the demand in the market.
2. A retail shares analysis that examines performance of retail stores in Monroe’s trade area as a benchmark of the greater region. This study will seek to determine if there are any retail clustering opportunities for Monroe.

2.2.1 Retail Leakage Analysis

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

Such an analysis is not an exact science. In some cases large outflow may indicate that money is being spent elsewhere (drug store purchases at a Wal-Mart or apparel purchases through mail-order). It is important to note that this analysis accounts best for retail categories where households (rather than businesses) are essentially the only consumer groups. For example, home improvement warehouses may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

2.2.1.1 Retail Leakage in the Primary and Secondary Trade Areas

In the previous year, stores located in the primary trade area for Monroe town center (including 30655, 30656, 30641, and 30025 zip codes) sold \$501 million in merchandise in all retail categories. Consumers who live in the PTA spent \$665 million dollars in stores of similar type. The retail leakage analysis of the primary trade area suggests that overall downtown is **leaking** sales to the tune of \$164 million. This is a large amount of leakage but is not unheard of, particularly in a community nearby an urban area as well as a number of competitive markets.

An analysis looking at the secondary trade area (including 30621, 30052, 30620) reveals a similar pattern. STA stores sold \$617 million dollars while consumers spent \$1.01 billion representing a total leakage of \$393 million.

The table on the following page details the consumer expenditures, retail sales, and inflow/outflow of dollars in the community and begins to outline the opportunity for retail growth in Monroe.

Retail Leakage Report for Selected Retail Categories

Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
Total Retail Sales Incl Eating and Drinking Places	664,846,256	500,936,878	163,909,378	1,010,091,590	617,405,926	392,685,664
Motor Vehicle and Parts Dealers-441	142,170,532	72,810,565	69,359,967	214,519,463	122,152,282	92,367,181
Automotive Dealers-4411	121,698,361	58,023,658	63,674,703	183,204,557	112,920,060	70,284,497
Other Motor Vehicle Dealers-4412	9,020,507	1,115,859	7,904,648	14,195,021	2,604,351	11,590,670
Automotive Parts/Accsrs, Tire Stores-4413	11,451,664	13,671,048	(2,219,384)	17,119,885	6,627,871	10,492,014
Furniture and Home Furnishings Stores-442	16,535,555	7,427,449	9,108,106	26,111,131	12,935,501	13,175,630
Furniture Stores-4421	8,936,985	5,462,441	3,474,544	13,887,113	4,911,394	8,975,719
Home Furnishing Stores-4422	7,598,570	1,965,008	5,633,562	12,224,018	8,024,107	4,199,911
Electronics and Appliance Stores-443	14,457,232	902,800	13,554,432	22,605,147	7,967,289	14,637,858
Appliances, TVs, Electronics Stores-44311	11,007,716	797,496	10,210,220	17,148,424	7,298,947	9,849,477
Household Appliances Stores-443111	2,645,809	389,883	2,255,926	4,148,092	324,576	3,823,516
Radio, Television, Electronics Stores-443112	8,361,907	407,613	7,954,294	13,000,332	6,974,371	6,025,961
Computer and Software Stores-44312	2,864,394	105,304	2,759,090	4,524,590	667,792	3,856,798
Camera and Photographic Equipment Stores-44313	585,122	0	585,122	932,133	550	931,583
Building Material, Garden Equip Stores -444	71,954,111	78,150,236	(6,196,125)	118,473,896	57,675,813	60,798,083
Building Material and Supply Dealers-4441	65,477,947	77,202,946	(11,724,999)	107,980,570	53,789,533	54,191,037
Home Centers-44411	25,336,484	40,174,413	(14,837,929)	41,701,409	46,211,169	(4,509,760)
Paint and Wallpaper Stores-44412	1,697,814	642,910	1,054,904	2,723,176	1,140,455	1,582,721
Hardware Stores-44413	4,840,980	18,703,984	(13,863,004)	7,843,527	929,657	6,913,870
Other Building Materials Dealers-44419	33,602,669	17,681,639	15,921,030	55,712,458	5,508,252	50,204,206
Building Materials, Lumberyards-444191	11,435,412	6,029,632	5,405,780	19,156,235	1,878,377	17,277,858
Lawn, Garden Equipment, Supplies Stores-4442	6,476,164	947,290	5,528,874	10,493,326	3,886,280	6,607,046
Outdoor Power Equipment Stores-44421	995,766	148,308	847,458	1,624,478	311,708	1,312,770
Nursery and Garden Centers-44422	5,480,398	798,982	4,681,416	8,868,848	3,574,572	5,294,276
Food and Beverage Stores-445	78,092,594	96,573,272	(18,480,678)	114,598,297	131,328,852	(16,730,555)
Grocery Stores-4451	70,925,106	95,108,113	(24,183,007)	103,970,383	127,192,524	(23,222,141)
Supermarkets, Grocery (Ex Conv) Stores-44511	67,354,391	88,546,713	(21,192,322)	98,689,654	122,240,837	(23,551,183)
Convenience Stores-44512	3,570,715	6,561,400	(2,990,685)	5,280,729	4,951,687	329,042
Specialty Food Stores-4452	2,413,867	1,056,776	1,357,091	3,530,072	4,136,328	(606,256)
Beer, Wine and Liquor Stores-4453	4,753,621	408,383	4,345,238	7,097,842	0	7,097,842

Opportunity Gap - Retail Stores

	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
Health and Personal Care Stores-446	32,629,200	33,661,118	(1,031,918)	45,223,071	15,655,198	29,567,873
Pharmancies and Drug Stores-44611	28,303,288	33,096,064	(4,792,776)	39,136,830	14,846,074	24,290,756
Cosmetics, Beauty Supplies, Perfume Stores	1,185,340	15,472	1,169,868	1,612,874	182,121	1,430,753
Optical Goods Stores-44613	1,017,491	120,581	896,910	1,577,282	227,418	1,349,864
Other Health and Personal Care Stores-44619	2,123,081	429,001	1,694,080	2,896,085	399,585	2,496,500
Gasoline Stations-447	74,569,059	116,335,851	(41,766,792)	107,843,202	92,614,671	15,228,531
Gasoline Stations With Conv Stores-44711	55,734,952	90,420,897	(34,685,945)	80,692,423	82,484,067	(1,791,644)
Other Gasoline Stations-44719	18,834,107	25,914,954	(7,080,847)	27,150,779	10,130,604	17,020,175
Clothing and Clothing Accessories Stores-448	29,975,674	3,130,762	26,844,912	47,104,503	2,655,050	44,449,453
Clothing Stores-4481	21,675,514	1,306,668	20,368,846	34,047,265	964,438	33,082,827
Men's Clothing Stores-44811	1,376,474	0	1,376,474	2,135,360	0	2,135,360
Women's Clothing Stores-44812	5,450,427	0	5,450,427	8,647,844	216,424	8,431,420
Childrens, Infants Clothing Stores-44813	1,349,262	0	1,349,262	2,093,645	14,148	2,079,497
Family Clothing Stores-44814	11,572,308	1,306,668	10,265,640	18,126,081	653,334	17,472,747
Clothing Accessories Stores-44815	495,514	0	495,514	782,139	0	782,139
Other Clothing Stores-44819	1,431,529	0	1,431,529	2,262,196	80,532	2,181,664
Shoe Stores-4482	4,160,810	1,527,998	2,632,812	6,526,424	0	6,526,424
Jewelry, Luggage, Leather Goods Stores-4483	4,139,350	296,096	3,843,254	6,530,814	1,690,612	4,840,202
Jewelry Stores-44831	3,810,225	291,238	3,518,987	6,004,874	1,690,612	4,314,262
Luggage and Leather Goods Stores-44832	329,125	4,858	324,267	525,940	0	525,940
Sporting Goods, Hobby, Book, Music Stores-451	10,499,802	1,536,297	8,963,505	17,339,896	3,526,185	13,813,711
Sportng Goods, Hobby, Musical Inst Stores-4511	7,571,081	1,488,367	6,082,714	12,422,854	2,842,744	9,580,110
Sporting Goods Stores-45111	3,679,155	679,312	2,999,843	6,112,558	2,284,802	3,827,756
Hobby, Toys and Games Stores-45112	2,550,192	416,872	2,133,320	4,176,077	123,871	4,052,206
Sew/Needlework/Piece Goods Stores-45113	624,357	26,793	597,564	990,525	179,145	811,380
Musical Instrument and Supplies Stores-45114	717,377	365,390	351,987	1,143,694	254,926	888,768
Book, Periodical and Music Stores-4512	2,928,721	47,930	2,880,791	4,917,042	683,441	4,233,601
Book Stores and News Dealers-45121	1,921,849	39,501	1,882,348	3,311,871	672,079	2,639,792
Book Stores-451211	1,804,610	39,501	1,765,109	3,127,444	655,159	2,472,285
News Dealers and Newsstands-451212	117,239	0	117,239	184,427	16,920	167,507
Prerecorded Tapes, CDs, Record Stores-45122	1,006,872	8,429	998,443	1,605,171	11,362	1,593,809

Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
General Merchandise Stores-452	78,967,967	39,032,969	39,934,998	120,261,734	44,907,789	75,353,945
Department Stores Excl Leased Depts-4521	36,671,794	13,189,896	23,481,898	56,542,474	5,609,797	50,932,677
Other General Merchandise Stores-4529	42,296,173	25,843,073	16,453,100	63,719,260	39,297,992	24,421,268
Warehouse Clubs and Super Stores-45291	36,472,270	21,112,314	15,359,956	54,718,029	37,376,201	17,341,828
All Other General Merchandise Stores-45299	5,823,903	4,730,759	1,093,144	9,001,231	1,921,791	7,079,440
Miscellaneous Store Retailers-453	16,578,483	6,035,985	10,542,498	25,921,525	5,651,535	20,269,990
Florists-4531	1,204,896	319,121	885,775	1,897,806	341,069	1,556,737
Office Supplies, Stationery, Gift Stores-4532	6,402,118	2,538,957	3,863,161	10,250,407	478,000	9,772,407
Office Supplies and Stationery Stores-45321	3,623,156	2,024,998	1,598,158	5,794,797	0	5,794,797
Gift, Novelty and Souvenir Stores-45322	2,778,962	513,959	2,265,003	4,455,610	478,000	3,977,610
Used Merchandise Stores-4533	1,351,021	2,551,850	(1,200,829)	2,159,222	2,300,906	(141,684)
Other Miscellaneous Store Retailers-4539	7,620,448	626,057	6,994,391	11,614,090	2,531,560	9,082,530
Non-Store Retailers-454	36,950,659	4,015,992	32,934,667	56,925,710	58,197,798	(1,272,088)
Electronic Shopping, Mail-Order Houses-4541	25,991,850	1,180,881	24,810,969	40,376,062	56,946,991	(16,570,929)
Vending Machine Operators-4542	1,693,709	419,972	1,273,737	2,505,204	492,697	2,012,507
Direct Selling Establishments-4543	9,265,100	2,415,139	6,849,961	14,044,444	758,110	13,286,334
Foodservice and Drinking Places-722	61,465,388	41,323,582	20,141,806	93,164,015	62,137,963	31,026,052
Full-Service Restaurants-7221	27,602,888	4,659,397	22,943,491	41,865,807	21,854,626	20,011,181
Limited-Service Eating Places-7222	26,076,076	27,899,145	(1,823,069)	39,465,588	35,127,099	4,338,489
Special Foodservices-7223	5,199,217	8,502,999	(3,303,782)	7,870,718	4,854,918	3,015,800
Drinking Places -Alcoholic Beverages-7224	2,587,207	262,041	2,325,166	3,961,902	301,320	3,660,582
GAFO *	156,838,348	54,569,234	102,269,114	243,672,818	72,469,814	171,203,004
General Merchandise Stores-452	78,967,967	39,032,969	39,934,998	120,261,734	44,907,789	75,353,945
Clothing and Clothing Accessories Stores-448	29,975,674	3,130,762	26,844,912	47,104,503	2,655,050	44,449,453
Furniture and Home Furnishings Stores-442	16,535,555	7,427,449	9,108,106	26,111,131	12,935,501	13,175,630
Electronics and Appliance Stores-443	14,457,232	902,800	13,554,432	22,605,147	7,967,289	14,637,858
Sporting Goods, Hobby, Book, Music Stores-451	10,499,802	1,536,297	8,963,505	17,339,896	3,526,185	13,813,711
Office Supplies, Stationery, Gift Stores-4532	6,402,118	2,538,957	3,863,161	10,250,407	478,000	9,772,407

Figure 12: Retail Leakage by Category in Monroe's Primary and Secondary Trade Areas. Source: Arnett Muldrow & Associates. Claritas, Inc.

2.2.1.2 Market Potential Analysis

Of course, Monroe cannot reasonably expect to capture all of the leaking sales from the various retail categories. Therefore, we must look at a potential capture scenario that might illustrate the potential for additional retail should some of the lost revenues be captured in the categories where retail leakage exists.

Through strategic recruitment, economic development and marketing, a community can expect to recapture a certain amount of sales that are leaking the community. Typically, a community could capture 20% of leakage from the primary trade area (one in every five dollars) is and 10% of the leakage from the secondary trade area (one in every ten dollars). In a community like Monroe with a tremendous amount of leakage, likely due to its strong regional retail magnets competing with its customer base, a more likely and somewhat more conservative scenario would be capturing 10% of the PTA leakage and 5% from the STA.

The table on the following page illustrates the potential capture based off of both the 20/10 and 10/5 scenarios. It presents the opportunity as a range of leakage capture as well as space demand. The sales per square foot for retail store types have been obtained from Dollars and Cents of Shopping Centers, published by the Urban Land Institute.

Capture Scenario for Selected Retail Categories

	20/10		10/5		Potential Capture 20/10	Potential Capture 10/5	Sales per Square Foot	Capture	
	20% of PTA Outflow	10% of STA Outflow	10% of PTA Outflow	5% of STA Outflow				20/10 Calculated Capture	10/5 Calculated Capture
Selected Retail Categories Below	26,896,505	30,947,232	13,448,253	15,473,616	57,843,737	28,921,869		365,249	182,624
Furniture Stores	694,909	897,572	347,454	448,786	1,592,481	796,240	141.84	11,227	5,614
Home Furnishing Stores	1,126,712	419,991	563,356	209,996	1,546,704	773,352	167.75	9,220	4,610
Household Appliances Stores	451,185	382,352	225,593	191,176	833,537	416,768	245.44	3,396	1,698
Radio, Television, Electronics Stores	1,590,859	602,596	795,429	301,298	2,193,455	1,096,727	207.17	10,588	5,294
Computer and Software Stores	551,818	385,680	275,909	192,840	937,498	468,749	207.17	4,525	2,263
Camera and Photographic Equipment	117,024	93,158	58,512	46,579	210,183	105,091	542.63	387	194
Building Material and Supply Dealers		5,419,104		2,709,552	5,419,104	2,709,552	142.38	38,061	19,030
Hardware Stores		691,387		345,694	691,387	345,694	121.08	5,710	2,855
Grocery Stores					0	0	371.79	0	0
Health and Personal Care Stores		2,956,787		1,478,394	2,956,787	1,478,394	247.29	11,957	5,978
Clothing and Clothing Accessories	5,368,982	4,444,945	2,684,491	2,222,473	9,813,928	4,906,964	164.60	59,623	29,811
Women's Accessory & Specialty	1,090,085	843,142	545,043	421,571	1,933,227	966,614	164.60	11,745	5,873
Shoe Stores	526,562	652,642	263,281	326,321	1,179,205	589,602	158.81	7,425	3,713
Jewelry Stores	703,797	431,426	351,899	215,713	1,135,224	567,612	263.92	4,301	2,151
Luggage and Leather Goods Stores	64,853	52,594	32,427	26,297	117,447	58,724	198.82	591	295
Sporting Goods Stores	599,969	382,776	299,984	191,388	982,744	491,372	153.46	6,404	3,202
Hobby, Toys and Games Stores	426,664	405,221	213,332	202,610	831,885	415,942	146.28	5,687	2,843
Sew/Needlework/Piece Goods Stores	119,513	81,138	59,756	40,569	200,651	100,325	74.91	2,679	1,339
Book Stores	353,022	247,229	176,511	123,614	600,250	300,125	161.16	3,725	1,862
General Merchandise Stores	7,987,000	7,535,395	3,993,500	3,767,697	15,522,394	7,761,197	133.90	115,925	57,963
Florists	177,155	155,674	88,578	77,837	332,829	166,414	149.82	2,222	1,111
Gift, Novelty and Souvenir Stores	453,001	397,761	226,500	198,881	850,762	425,381	168.55	5,048	2,524
Foodservice and Drinking Places	4,028,361	3,102,605	2,014,181	1,551,303	7,130,966	3,565,483	201.63	35,367	17,683
Drinking Places -Alcoholic Beverages	465,033	366,058	232,517	183,029	831,091	415,546	88.07	9,437	4,718

Figure 13: Capture Scenario for Monroe Town Center. Source: Arnett Muldrow & Associates, Claritas Inc., and ULI's Dollars and Cents of Shopping Centers.

Based on this scenario table, Monroe could support between 182,624 and 365,249 square feet of additional retail space. This is a tremendous amount of space opportunity based on the demand created in both the primary and secondary trade areas. These capture numbers represent supportable retail space based off of existing demand. They are real numbers based on the current retail market and economic climate. Clearly, certain store types can be supported such as:

- Apparel stores: this category includes all apparel stores including children's, women's, and men's.
- Restaurants, both full service and limited service, both mostly full.
- General Merchandising.
- Home related categories such as furniture, home furnishings, hardware, and building materials.
- Specialty retail categories including shoe stores, bookstores, gifts, jewelry, sporting goods, etc.
- Electronics categories including appliances, computer & software, radio & tv.

These opportunities will be presented in greater detail later in this report.

Additionally, several other demand indicators might help existing businesses expand their merchandise mix to attract shoppers who are otherwise going somewhere else to buy these products.

2.2.2 Retail Shares Analysis

Retail shares analysis places Monroe's Primary Trade Area businesses as a proportion of a larger region. This in turn, is used to benchmark selected retail categories to determine if particular retail types are under performing, representing an opportunity for expansion, or performing exceptionally well, representing an opportunity for clustering additional related businesses around a strength.

For the purposes of this study, Monroe's primary trade area was compared to two different regions. The first region represents Monroe's trade areas and nearby zip codes. This geography was chosen based off of the overall extents of Monroe's market penetration as identified by the zip code survey. It also takes into account the immediate competitive markets of Madison, Covington, and Lawrenceville. The second region is Walton plus adjacent counties. This seven county region is much larger but includes all competitive markets plus the more regional focused retail offerings along the I-85 corridor through Gwinnett County.

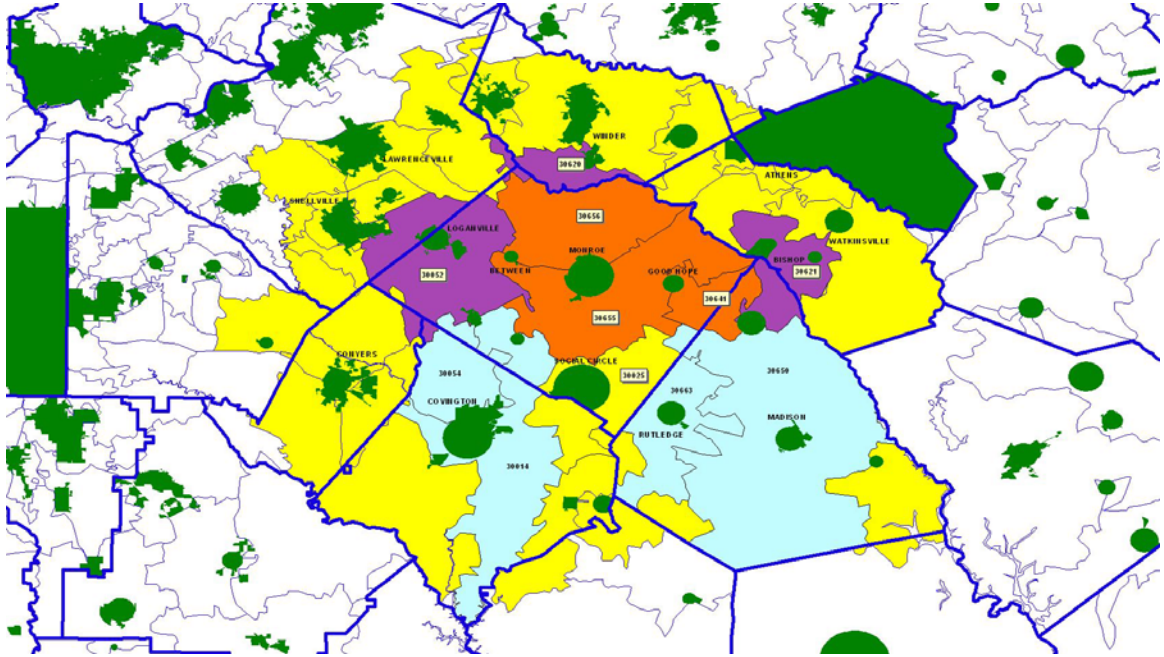


Figure 14: Shares Region 1 based off of zip codes and regional market penetration

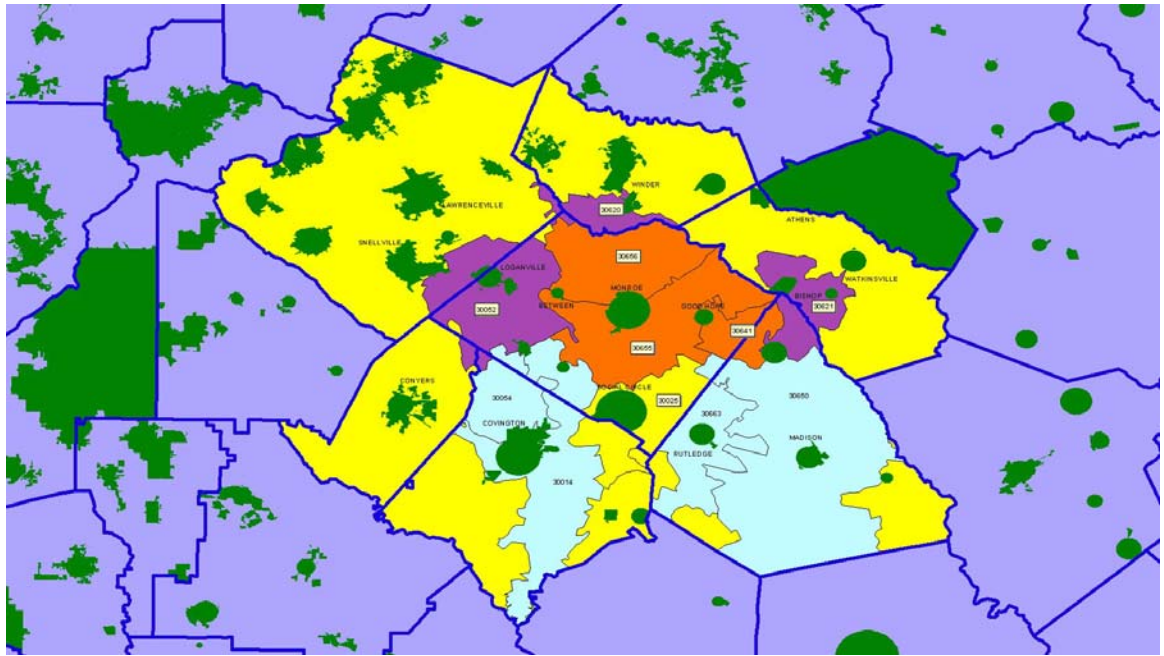


Figure 15: Shares Region 2 based off of seven county region

Selected Results

The primary trade area accounted for sales of 501 million dollars. Region 1 sales added up to 9.1 billion dollars while the larger Region 2 had over 18 billion dollars in sales. Business sales in Monroe's primary trade area therefore account for a 5.2% share of Region 1 and 2.8% of Region 2. Selected results are presented below:

	Primary	Region 1	Region 2	R1	R2
Total Retail Sales	500,936,878	9,719,428,522	18,060,179,140	5.2%	2.8%
Motor Vehicle and Parts Dealers	72,810,565	2,364,501,119	4,894,052,044	3.1%	1.5%
Automotive Dealer	58,023,658	1,986,457,566	4,321,258,050	2.9%	1.3%
Other Motor Vehicle Dealers	1,115,859	108,017,671	170,753,012	1.0%	0.7%
Automotive Parts/Accsrs, Tire Stores	13,671,048	270,025,882	402,040,982	5.1%	3.4%
Furniture and Home Furnishings Stores	7,427,449	260,149,796	675,631,947	2.9%	1.1%
Furniture Stores	5,462,441	126,930,678	386,660,023	4.3%	1.4%
Home Furnishing Stores	1,965,008	133,219,118	288,971,924	1.5%	0.7%
Electronics and Appliance Stores	902,800	213,070,119	507,728,952	0.4%	0.2%
Appliances, TVs, Electronics Stores	797,496	179,181,211	342,843,043	0.4%	0.2%
Household Appliances Stores	389,883	13,699,742	20,098,983	2.8%	1.9%
Radio, Television, Electronics Stores	407,613	165,481,469	322,744,060	0.2%	0.1%
Computer and Software Stores	105,304	29,586,755	144,684,912	0.4%	0.1%
Camera and Photographic Stores		4,302,153	20,200,997	0.0%	0.0%
Building Material, Garden Equip Stores	78,150,236	1,245,564,271	2,167,742,981	6.3%	3.6%
Building Material and Supply Dealers	77,202,946	1,174,453,625	2,048,226,024	6.6%	3.8%
Home Centers	40,174,413	504,281,110	782,127,989	8.0%	5.1%
Paint and Wallpaper Stores	642,910	29,642,237	48,956,021	2.2%	1.3%
Hardware Stores	18,703,984	68,844,388	119,956,020	27.2%	15.6%
Other Building Materials Dealers	17,681,639	571,685,890	1,097,185,994	3.1%	1.6%
Building Materials, Lumberyards	6,029,632	194,951,265	374,152,640	3.1%	1.6%
Lawn, Garden Equipment, Supplies	947,290	71,110,646	119,516,957	1.3%	0.8%
Outdoor Power Equipment Stores	148,308	9,314,040	36,533,989	1.6%	0.4%
Nursery and Garden Centers	798,982	61,796,606	82,982,968	1.3%	1.0%

Figure 16: Shares Analysis for Primary Trade Areas. Source: Arnett Muldrow & Associates & Claritas, Inc.

The table above shows partial results of the shares analysis. The purpose of this study is to not only identify clustering opportunities but also to provide support data for the previous retail leakage study.

A category with a share percentage much higher than the benchmark 5.2% or 2.8% share of all retail sales would represent a potential retail cluster. Anything significantly below the benchmark figures support the demand side analysis presented earlier. When comparing Monroe’s primary trade area to the larger region, a few clustering opportunities are evident.

	R1	R2
Total Retail Sales	5.2%	2.8%
Home Centers	8.0%	5.1%
Hardware Stores	27.2%	15.6%
Supermarkets, Grocery	6.9%	4.9%
Convenience Stores	10.8%	7.6%
Specialty Food Stores	6.6%	3.0%
Pharmacies and Drug Stores	8.7%	6.7%
Gasoline Stations With Conv Stores	9.3%	6.2%
Other Gasoline Stations	14.9%	11.5%
Warehouse Clubs and Super Stores	6.0%	2.1%
All Other General Merchandise Stores	6.4%	3.5%
Used Merchandise Stores	12.9%	9.7%
Special Foodservices	27.0%	13.7%

Figure 17: Clustering opportunities based off of shares analysis.

- **Used merchandise** – Perhaps the biggest cluster opportunity lies with antique stores. There are already several quality antique stores located in the area, which is likely a reason for the 12.9% & 9.7% share of the regional used merchandising sales. This suggests that Monroe is becoming a destination for antiques shopping within the larger area. Monroe should recruit additional antiques stores into the community.
- **Specialty food stores** – Unlike grocery stores, specialty food stores including bakeries, meat, and fruit & vegetable markets, retail a specialized line of foods. The data shows that should have potential in the Monroe market both from a retail leakage and retail shares perspective
- **General Uses:** Regional attractors such as Home Centers (Home Depot), Superstores (Wal-Mart), grocery, convenience and gas all have a higher share than the benchmark. This is likely due more to Monroe being a regional retail center serving a somewhat rural and suburban market, rather than a clustering opportunity.

The remainder of the categories have a share much smaller than the benchmark shares. These numbers support the retail leakage data and suggest a lack of supply for the specific categories.

2.3 Market Analysis Observations

Specific retail category opportunities based off the market analysis include:

- **“Home” related retail** – Considering the residential growth in Walton County, new subdivisions, and commuting patterns, Monroe’s biggest opportunity for new retail may lie in home-related business. This would be businesses that would support new and existing homeowners, such as:
 - **Furniture Stores.** Downtown Monroe already has a cluster of well-established quality furniture stores. These businesses have a large regional clientele (according to interviews and the zip code survey) and likely draw people into downtown. Annually, Monroe’s PTA is leaking approximately \$3.5 million in furniture sales. The STA is leaking nearly \$9 million. There is enough demand for between 5,600 to 11,000 square feet of furniture store space.
 - **Home Furnishings.** Similar to furniture, home furnishings shows a significant amount of leakage and the potential for the Monroe community to support between 4,600 and 9,000 square feet of this category. The primary trade area alone is leaking \$5.6 million. As an example, a typical Pier 1 Imports will have annual sales averaging \$1.7 million. This opportunity is even greater when considering the demand for additional furniture store space.
 - **Hardware.** There is a small potential for about 2,800 to 5,600 square feet. Much of the leakage is in the STA, and likely some of that is coming back into the PTA. Still, there may be the possibility for the expansion of a locally owned hardware store in downtown.
- **Apparel** – There is a fairly large opportunity in this category. The PTA is leaking \$20 million alone and there is a combined trade area leakage of over \$53 million. Most of the opportunity lies in the Women’s and Family Clothing subcategories, with smaller levels of potential in Men’s and Children’s. There is demand for at least 29,000 square feet of additional space. Additionally, clothing accessories shows demand for at least 6,000 square feet.
- **General Merchandising** – There does seem to potential to expand in this category. Even with the Super Wal-Mart in town, the PTA is leaking over \$40 million. Outside of smaller general merchandising stores such as Dollar General, there would be little opportunity in downtown Monroe.
- **Antiques & Used Merchandise** – This is perhaps one of Monroe Town Center’s key opportunities. The PTA is gaining slightly in used merchandise categories, but considering the destination characteristics of the antique business, it is likely that a broader antiques market could be recruited. In fact, the shares analysis seems to suggest that Monroe already has a cluster of these establishments and that it is already an antiques destination. The shares number is nearly three times that of the benchmark share. Considering how far outside the trade area this category can draw, additional stores of similar type should work well in Monroe. There is also the potential to market downtown Monroe as an antiques destination.

- **Eating & Drinking Places** – Again, this is another huge opportunity to recruit business. The PTA is leaking \$20 million and the combined trade areas are leaking \$51 million. The vast majority of this leakage is in the “full-service” category, like Twisted Oak and Bella Cucina. There is demand for between 17,000 and 35,000 square feet of additional space in this category. In this era where there is a renewed interest in our downtowns, restaurants are often on the leading edge of downtown revitalization, followed by expanded retail and residential. Dining is one of the main retail types that consistently attracts customers into downtown – both the local and visitor markets, and should be a component of any recruitment strategy. There is also demand for “drinking places” – at least 4,500 square feet. This category includes taverns and bars, those places who sell alcohol for immediate consumption on premises. They also provide limited food services.
- **Electronics** – The electronics category includes radio & tv, appliances, and computer & software. The PTA is leaking about \$8 million in radio, tv & electronics. As an example, Rex stores have annual sales of around \$1.6 million while a small Radio Shack may average around \$800,000. There is demand potential in this category for around 5,000 to 10,000 square feet. A typical Radio Shack runs around 2,500 square feet. There is also demand for between 1,700 and 3,400 sf of appliance stores, and between 2,200 and 4,500 of computer & software stores.
- **Specialty Retailing** – Specialty retail can be particularly important in downtown environments. Monroe’s trade areas show specific opportunities for:
 - **Sporting Goods** – about 3,000 to 6,000 square feet. This could be an independently owned store downtown.
 - **Shoes** – between 3,700 and 7,000 square feet, enough for a new store or expansion of an existing one
 - **Jewelry** – smaller demand for around 2,000 to 4,000 square feet.
 - **Bookstores** –There is demand for at least 1,800 square feet. This can be a particularly difficult category own its own, and likely should be done in conjunction with another use, such as coffee, restaurants, or gifts.
 - **Gift Stores** – there is demand for at least 2,500 square feet of space
 - Slight demand for hobby & toy, sewing & needlework as well.

Specialty Food Stores – “specialty foods” shows a \$1.4 million leakage in the primary trade area. Specialty foods include meat and vegetable markets, fish, bakeries, candy, etc. While there is leakage, there is also a larger than normal share of the regional specialty foods sales. These types of categories can perform well in a downtown environment if there is demand, which there seems to be in Monroe. Similarly, there is about \$4 million leaking in beer and wine store sales in the primary trade area suggesting the potential for a small wine shop in downtown.

Several other retail types suggest the potential for expanded retail space in the community, but the ones listed above are the primary opportunities.

3.0 Demographics and Market Segmentation

The market research and market opportunities detailed in this report must be qualified by an understanding of the general makeup of the Monroe community. This section will present a number of demographic indicators and trends for Monroe, the trade areas for Monroe town center, Walton County, and the region. It will also present a detailed segmentation of downtown's local trade areas classifying the market segments by socioeconomic and life stage characteristics.

3.1 Demographics

3.1.1 Market Area

The market analysis for Monroe began with a zip code survey of customers of businesses located in the LCI study area. This market definition study not only helped determine the local, regional, and visitor market, but also identified the true geography of downtown Monroe's primary and secondary trade areas – those local geographies most relevant to downtown.

The demographics described here are divided primarily between the City of Monroe, and its primary trade area, consisting of four zip codes (30656, 30655, 30641, and 30025) that encompass the towns of Monroe, Social Circle, and Good Hope. The secondary trade area consists of three zip codes (30052, 30620, and 30621) and encompasses the towns of Loganville, Bishop, and part of Winder. The PTA and STA combined cover the majority of Walton County.

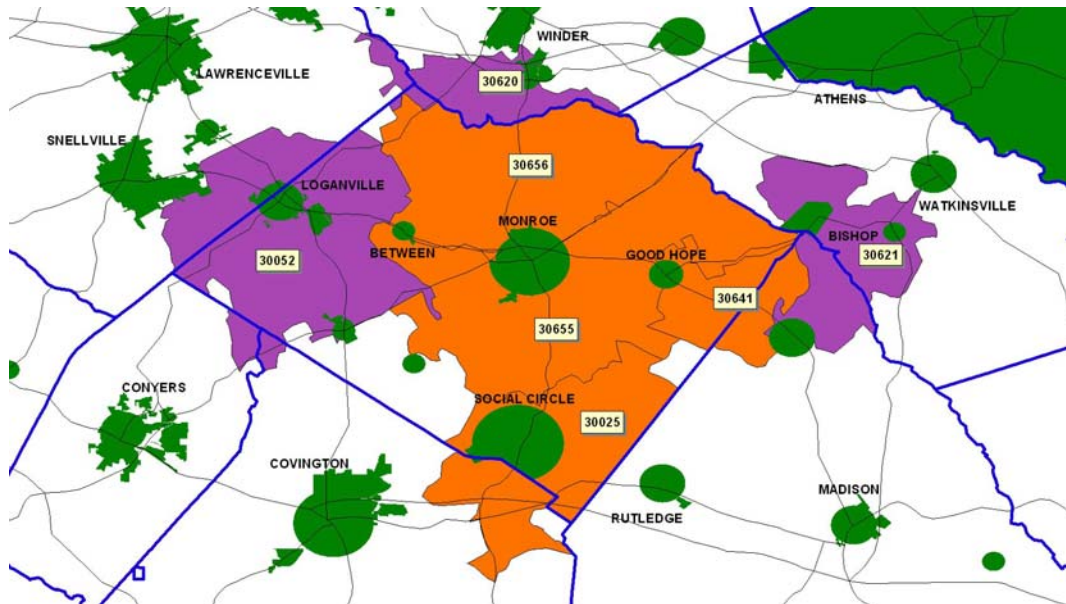


Figure 18: Market Areas used for Demographic Analysis

3.1.2 Population Growth

As the chart below indicates, the population of the PTA has grown at almost 4% per year from 2000 to 2007, while Monroe itself has only grown at 1.5% per year during the same time period. The expected growth in the next five years follows those numbers very closely, with the PTA growing slightly slower than the previous time period, with Monroe growing a little faster than before. Both of the areas show a very slight decrease in the average household size from 2007 to 2012.

Geographic Area	2000	Average Annual Change (2000-2007)			Average Annual Change (2007-2012)		
		2007	Number	Percent	2012	Number	Percent
PTA							
Population	36,695	46,695	1,429	3.9%	53,975	1,456	3.1%
Households	13,135	16,706	510	3.9%	19,343	527	3.2%
Avg. HH size	2.75	2.75	0	0.0%	2.74	-0.01	-0.1%
City of Monroe							
Population	11,407	12,662	179	1.6%	13,736	215	1.7%
Households	4,287	4,749	66	1.5%	5,157	82	1.7%
Avg. HH size	2.59	2.56	-0.03	-0.2%	2.55	-0.01	-0.1%

Figure 19: Population Growth. Source: Arnett Muldrow & Associates. Claritas, Inc.

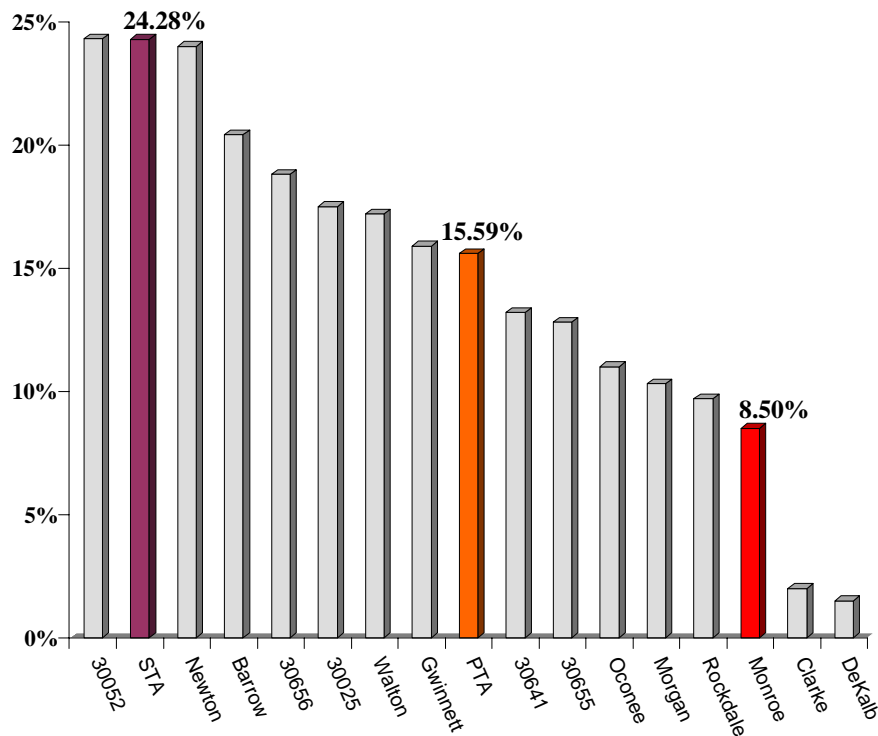


Figure 20: Regional Population Growth Projected 2007 - 2012. Source: Claritas, Inc.

The chart above shows regional population growth for counties and communities surrounding Monroe, projected over the next five years. The City of Monroe is identified in red, the PTA in orange, and the STA in purple. There has been a tremendous amount of regional growth since 1990, and these trends are projected to continue. The STA is projected to grow at the higher end of regional population growth over the next five years while the PTA is in the middle. At 8.5% growth, the City of Monroe is projected to grow at a healthy rate, yet it is at the lower end of regional projections.

3.1.3 Age Distribution

The median age in Monroe is 32.8 years, while the PTA is slightly older with a median age of 34.3 years. This is also visible in the charts below, where the age breaks reveal that the PTA has a larger percentage of its population in the 25 to 64 age range.

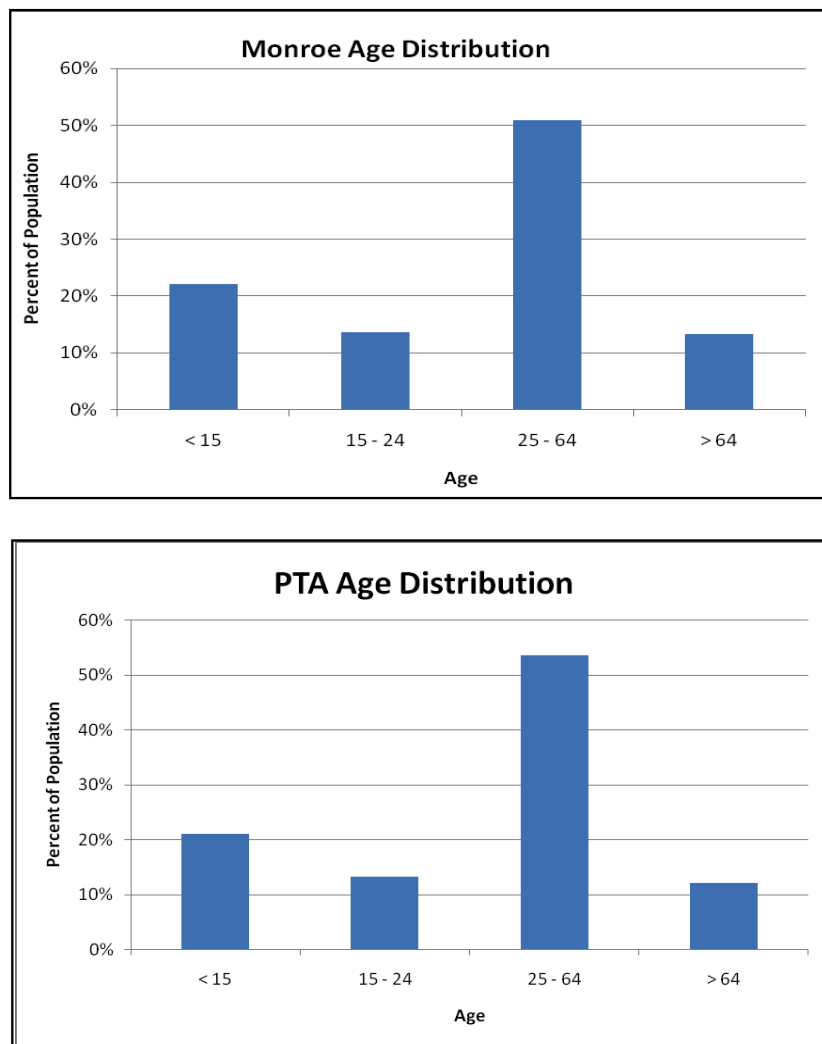


Figure 21: City of Monroe & PTA Age Distribution

3.1.4 Racial Composition

In the City of Monroe, the racial composition is pretty evenly divided between white and African-American residents, with less than 3% of the population being of other races. On the other hand, the Primary Trade Area is predominantly white at 73% of the population, with 23% being African-American and 4% of some other race.

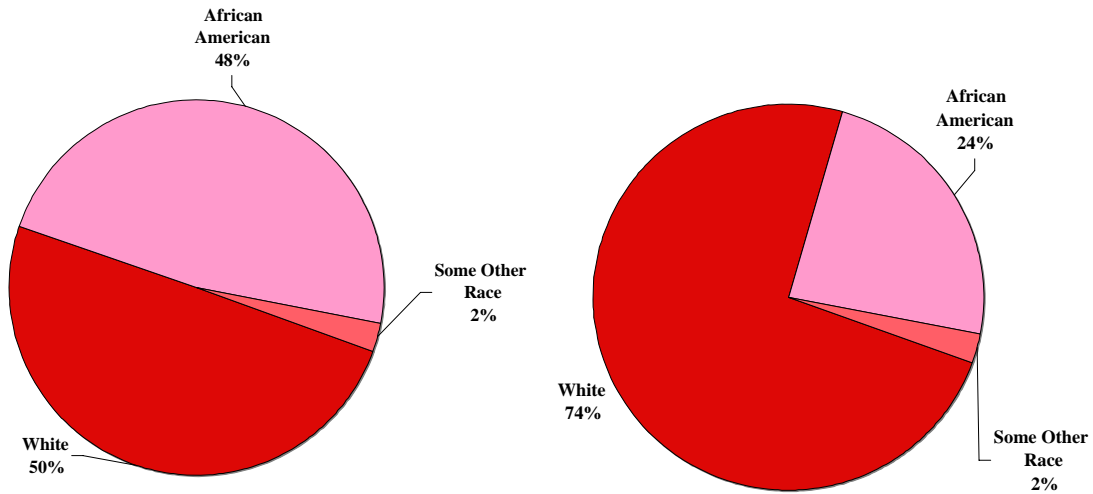


Figure 22: Racial Composition of City of Monroe (Left) and PTA (Right). Source: Claritas, Inc.

3.1.5 Income Levels

The 2007 median household income for Monroe is estimated to be \$31,809. The Primary Trade Area had a significantly higher median income of \$49,949. The charts below illustrate that Monroe has a significant portion of its population with a household income of less than \$15,000 per year. The largest income range for the city is between \$25,000 and \$49,999. On the other hand, the PTA's largest income group is between \$50,000 and \$99,999, with the second largest group in the \$25,000 to \$49,999 range.

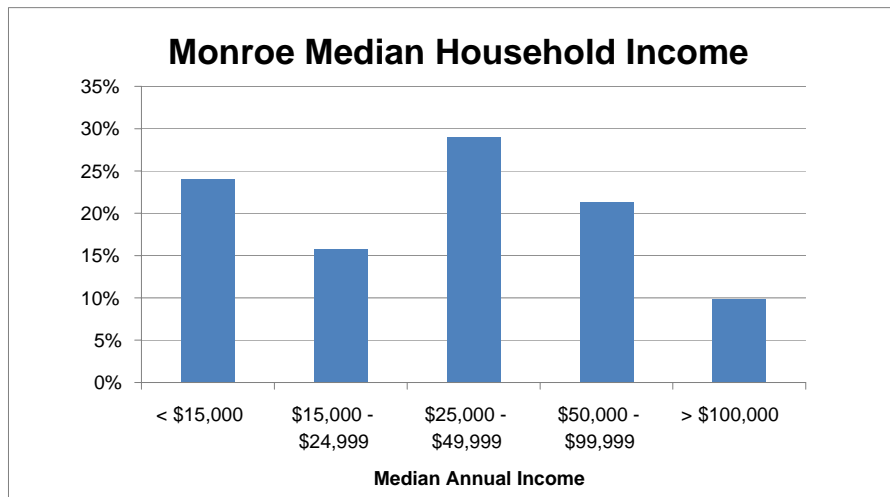


Figure 23: City of Monroe Median Household Income Distribution 2007. Source: Claritas, Inc.

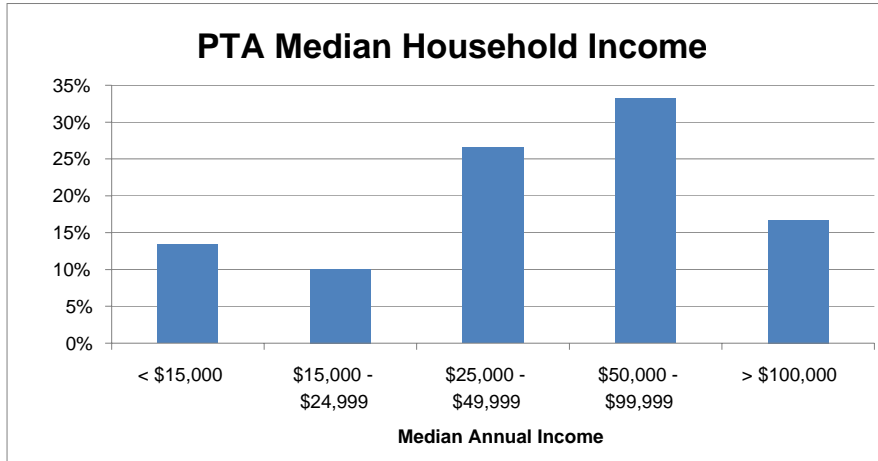


Figure 24: Monroe PTA Median Household Income Distribution 2007. Source: Claritas, Inc.

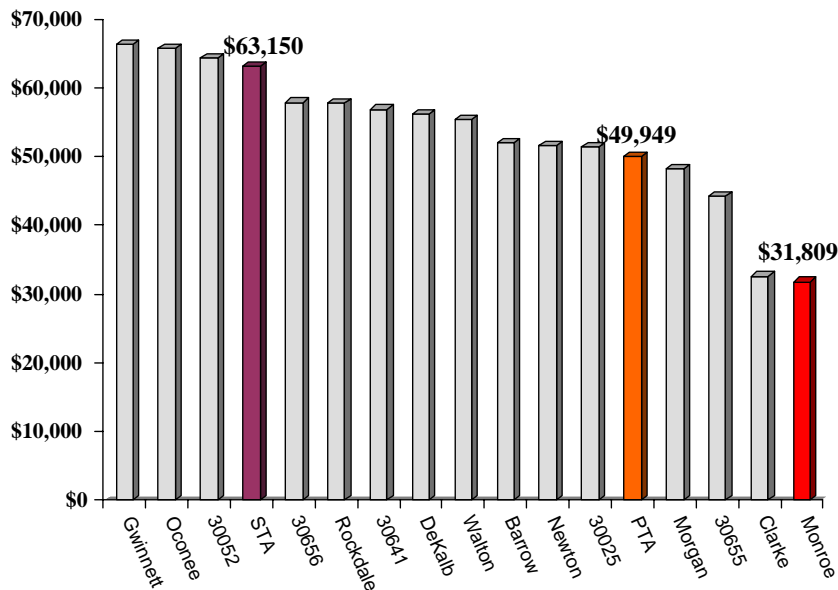


Figure 25: Regional Median Household Income 2007. Source: Claritas, Inc.

When comparing the regional median household income levels for 2007, we see that the City of Monroe is at the low end, while the Secondary Trade Area is in the upper third. The chart below shows a similar trend whereby the City of Monroe has far more families below poverty level in 2007 than the PTA, Walton County, Georgia, and the US. Monroe has 19.8% of its families below poverty level while Walton is lower than the state and federal figures at 7.9%.

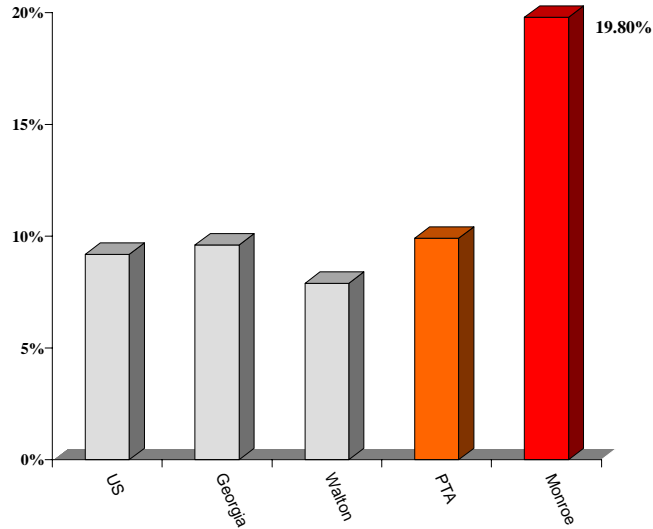


Figure 26: 2007 Families Below Poverty Level. Source: Claritas

Trend levels for median household income from 2000 to 2012 indicate growth in Monroe the PTA, and Walton County. In Monroe, the numbers of households that make less than \$15,000 a year are decreasing while those making \$25,000 and above are increasing. The largest increase in income groups in both Monroe and the PTA is in households making more than \$100,000 a year. While the Primary Trade Area still shows households with significantly higher incomes, both areas are moving upward in the area of household incomes. This trend is even more pronounced in Walton County.

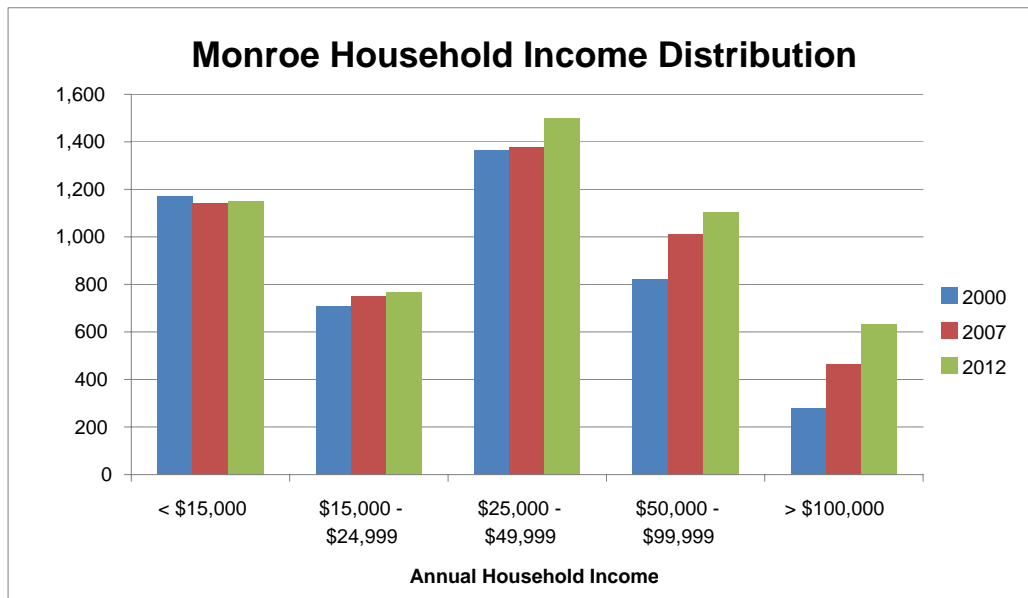
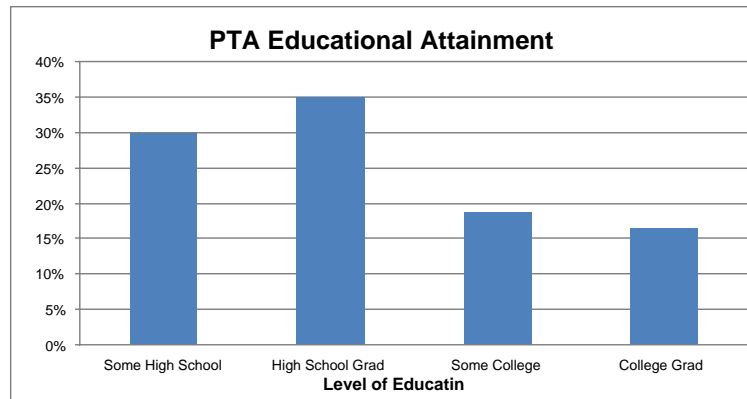
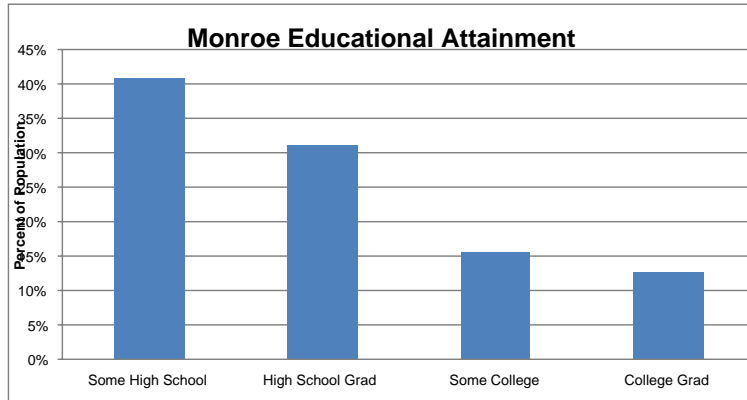


Figure 27: Monroe Household Income Distribution 2000 -2007. Source: Claritas, Inc.

3.1.6 Educational Attainment

Regarding educational attainment, the PTA has a higher percentage of high school graduates than Monroe, as does Walton County. On the other hand, PTA has only slightly higher percentages of residents with either some college or college degrees.



3.2 Market Segmentation

A market segmentation report for the Monroe town center's primary and secondary trade areas will give a better idea of the make up and spending habits of the residents living in local markets. This analysis breaks down the counts and percentages of social group cluster and will help identify customers based on their demographic groupings including age, gender, income, education, occupation, and ethnic group. Each cluster group will desire specific products and services.

This information should help local businesses concentrate on the individual subsets that exist in the trade areas. By recognizing the different segments of the market and analyzing their various needs and requirements, a business can more effectively focus its marketing dollars or building its inventory around the targeted market. This is particularly important in a community like Monroe that reaches out to a growing suburban market.

For this analysis, all data comes from PRIZM NE cluster groups as calculated by Claritas, Inc., a nationally known marketing service. The segmentation defines a market geography by 66 different lifestyle types, 14 social groups, and 11 life stage groups. The PRIZM cluster groups are centered on four groups of urbanization: Urban (such as Atlanta), Second Cities (Decatur), Suburbs (Duluth), and Town and Rural (Monroe and Walton County).

For downtown Monroe's combined trade areas, there are approximately 36,883 households. This trade area covers most of Walton County, and is identified primarily as the "Town and Rural" urbanization category. A portion of the market base is also considered in the "Suburbs" category.

3.2.1 Social Group Segmentation

The urbanization grouping is then broken down into social group categories. Each of the social categories is further divided into subcategories. The chart below shows the social group category breakdowns of Monroe trade areas (Source: Claritas, Inc.)

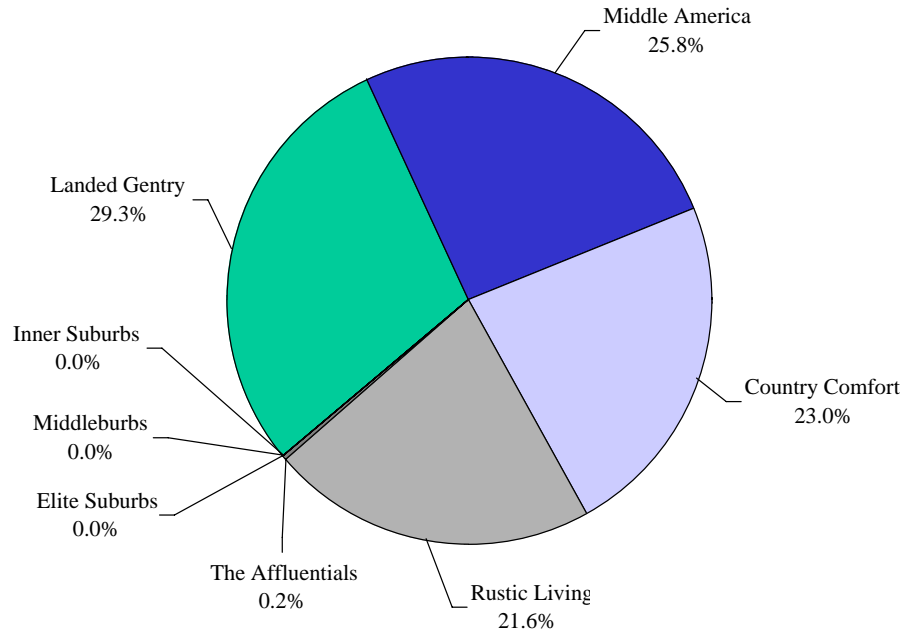


Figure 28: Urbanization & Social Group Categories. Source: Claritas, Inc

Town and Rural Social Groups:

Landed Gentry are wealthy households that have migrated to smaller boomtowns. They have college degrees, professional jobs, large homes, and are very likely to telecommute. Products they buy are consumer electronics, computer technology, books, luxury cars and vehicles, children’s toys, and exercise equipment. Land Gentry median household income is \$82,596. This group represents 29.3% of the household makeup in Monroe’s combined trade area.

Middle America families are middle-class households that are predominantly white, high school educated, and are typically married couples to large families. These are conservative customers with conservative values. They enjoy antique collecting, outdoor activities such as hunting and fishing, crafts, and are attracted to local sports teams. Their median household income is \$41,405. This group represents 25.8% of Monroe’s combined trade area.

Country Comfort households are typically middle-class families and married couples. They have some level of college education and own their own homes. They enjoy middle-class activities such as barbequing, gardening, woodworking, and playing golf. They often drive SUVs and trucks. Their median household income is \$53,862. This group represents 23% of Monroe’s combined trade area.

Rustic Living households represent somewhat rural areas and towns. They have modest income levels, lower levels of education, and blue-collar occupations. They live in older, smaller homes and have a mixed makeup of young and old, married and unmarried, white and black. This group enjoys social activities with families and church, outdoor activities such as fishing and hunting, and have traditional values. Their median

household income is \$30,283. This group represents 21.6% of Amherst's combined trade area.

Monroe's combine primary and secondary trade areas is classified as 99.7% "Town and Rural" and 0.3% "Suburbs". The Suburb social categories represent a marginal portion of Monroe's overall market and include the following:

- The Affluentials - 0.2% of Monroe's market
- Elite Suburbs - 0.04%
- Middleburbs - 0.04%
- Inner Suburbs - 0.02%

3.2.2 Life Stage Group Segmentation

The combined trade areas are then grouped by life stage categories. PRIZM Life Stage categories are based on affluence, the age of the households, as well as the family type, or presence of children. There are three classes of life stage including "Younger Years", "Family Life", and "Mature Years" (Source: Claritas, Inc.)

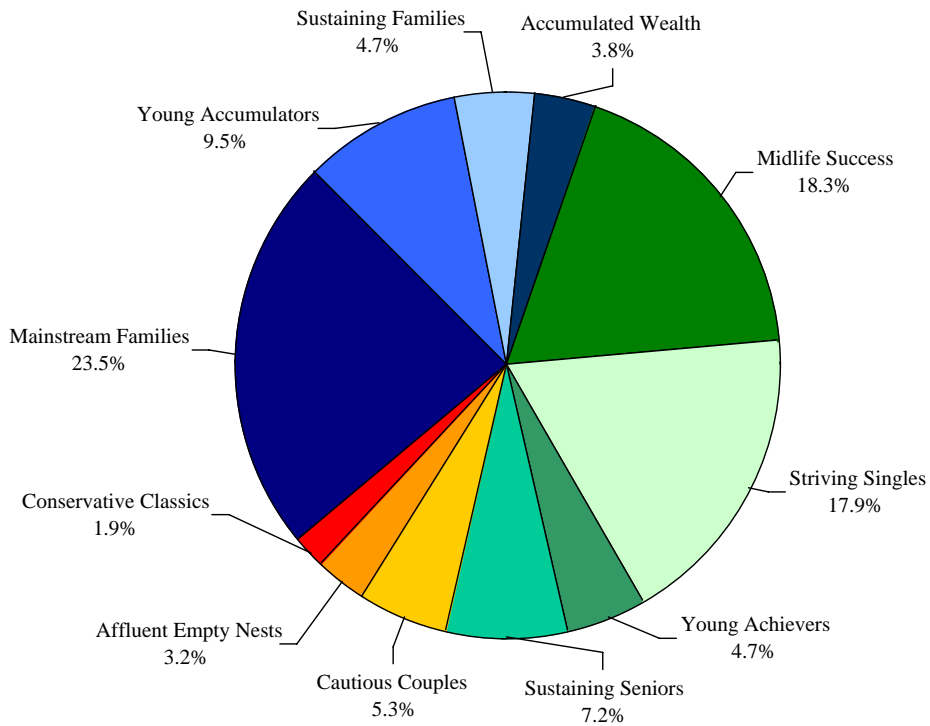


Figure 29: Life Stage Categories. Source: Claritas, Inc.

The chart shows “Family Life” in Blue, “Younger Years” in Green, and “Mature Years” in Red. Monroe’s combined trade area’s lifestage categories breakdown as follows:

Family Life	- 41.5%
Younger Years	- 40.9%
Mature Years	- 17.6%

The largest three subcategories include:

Mainstream Families are part of the “Family Life” category and are middle and working class families. They are a broad range of ages but typically have one child under 18. They have simple homes, often manufactured, and multiple cars. This makes up 23.5% of Monroe’s market area

Midlife Successes are part of the “Younger Years” lifestage and make up about 18.3% of Monroe’s trade areas. These families are either single or married with no children. They are higher income, white-collar and are quite successful.

Striving Singles, also part of the “Younger Years” lifestage, make up 17.9% of Monroe’s trade areas. These single households are typically younger with lower incomes and blue collar or service jobs. They live in apartments & mobile homes and often rent.

3.2.3 Market Segment Subcategories

Each of the social group and lifestage categories are then broken down into the 66 segments and are identified in the chart below. This chart represents the detailed breakdown of the market base in downtown Monroe's combined trade area. The chart is followed by a table which outlines the social group and lifestage categories for each segment, along with demographic characteristics.

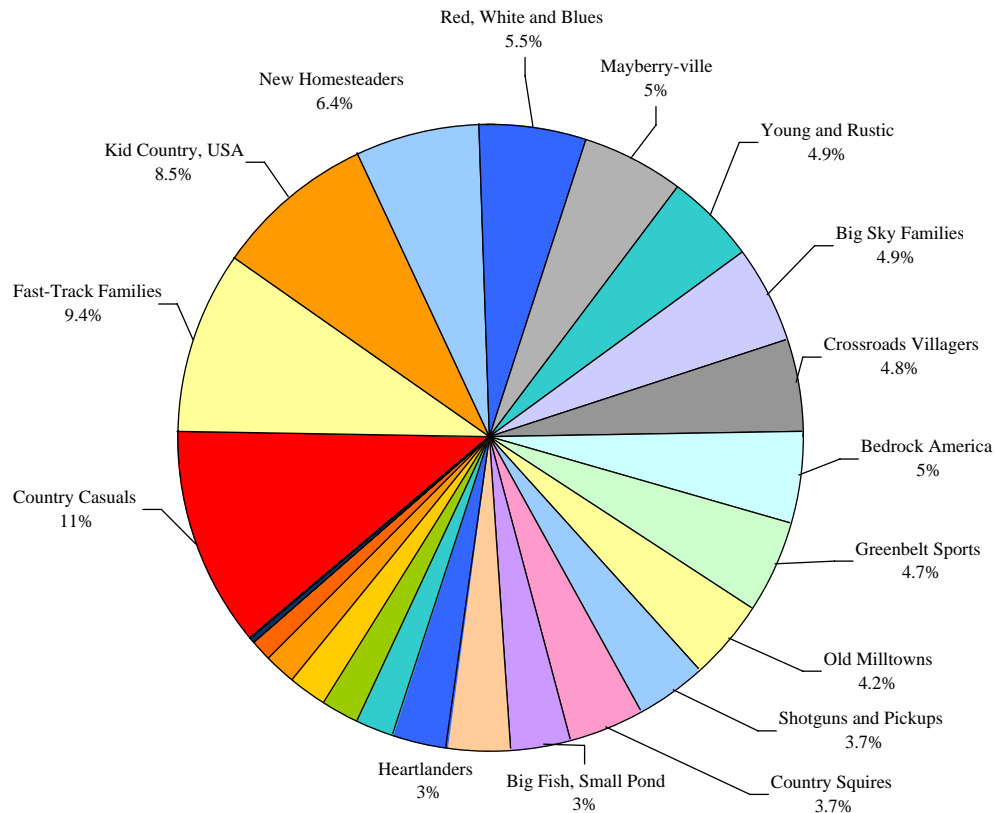


Figure 30: PRIZM Segmentation Subcategories. Source: Claritas, Inc

The characteristics of each social group subcategory are detailed on the following page.

This analysis presents a demographic breakdown of downtown Monroe's primary and secondary trade areas. It identifies the lifestyle and social characteristics of the full spectrum of residents in the market. Individual retailers in downtown each have their own niches and intended markets, and most likely will not accommodate the comprehensive market. However, understanding the true makeup of the market will help the merchants make marketing decisions including targeting specific segments, expanding product lines, and determining how to maximize their advertising expenditures.

PRIZM NE Code	Area Name	Households	Pct.	Pred. Inc.	Age	Pred HH Comp.	Pred. Tenure/Type	Pred. Education	Pred. Employment	Pred. Race
Upper Crust		1	0.00%	Wealthy	Age 45+	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White, Asian
Blue Blood Estates		3	0.01%	Wealthy	Age 35-64	Families w/Kids	Owner / SFDU	College Grad.+	Exec, Prof, WC	White, Asian
Movers and Shakers		5	0.01%	Wealthy	Age 35-64	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White, Asian
Country Squires		1380	3.74%	Wealthy	Age 35-64	Families w/Kids	Owner / SFDU	College Grad.+	Exec, Prof, WC	White
Winner's Circle		6	0.02%	Wealthy	Age 25-54	Families w/Kids	Owner / SFDU	College Grad.+	Exec, Prof, WC	White, Asian
Big Fish, Small Pond		1168	3.17%	Upscale	Age 45+	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White
God's Country		593	1.61%	Upscale	Age 35-64	Married Couples	Owner / SFDU	College Grad.+	Exec, Prof, WC	White
New Empty Nests		6	0.02%	UpperMid	Age 65+	Married Couples	Owner / SFDU	College	Prof, WC	White
Pools and Patios		5	0.01%	UpperMid	Age 45+	Married Couples	Owner / SFDU	College	Prof, WC	White
Beltway Boomers		13	0.04%	UpperMid	Age 35-64	Families w/Kids	Owner / SFDU	College	Prof, WC	White, Asian
Kids and Cul-de-Sacs		27	0.07%	UpperMid	Age 25-54	Families w/Kids	Owner / SFDU	College	Prof, WC	White, Asian, Hispanic
Home Sweet Home		31	0.08%	UpperMid	Age 25-44	Married Couples	Owner / SFDU	College	Prof, WC	White, Black, Asian
Fast-Track Families		3467	9.40%	Upscale	Age 25-54	Families w/Kids	Owner / SFDU	College	WC	White
Gray Power		2	0.01%	Midscale	Age 65+	Singles/Couples	Owner / SFDU, Hi-Rise Multi	College	Prof, WC	White
Young Influentials		1	0.00%	Midscale	Age <35	Mostly Singles	Renter / Hi-Rise Multi	College	Prof, WC	White, Black, Asian
Greenbelt Sports		1718	4.66%	Midscale	Age 25-54	Married Couples	Owner / SFDU	College	Prof, WC	White
Country Casuals		4195	11.37%	UpperMid	Age 35-64	Married Couples	Owner / SFDU	Some College	WC, BC	White
Traditional Times		700	1.90%	Midscale	Age 55+	Married Couples	Owner / SFDU	Some College	WC, BC, Farm	White
Suburban Sprawl		5	0.01%	Midscale	Age 25-44	Singles/Couples	Mix / SFDU, Lo-Rise Multi	College	WC	White
New Homesteaders		2366	6.41%	Midscale	Age 25-44	Families w/Kids	Owner / SFDU, Mobile	Some College	WC, BC	White
Big Sky Families		1795	4.87%	Midscale	Age 25-54	Families w/Kids	Owner / SFDU, Mobile	Some College	WC, BC, Farm	White
Blue-Chip Blues		5	0.01%	Midscale	Age <45	Families w/Kids	Mix / SFDU, Lo-Rise Multi	Some College	WC, Service, BC	White, Black, Hispanic
Mayberry-ville		1918	5.20%	Midscale	Age 35-64	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Simple Pleasures		776	2.10%	LowerMid	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC, Farm	White
Red, White and Blues		2013	5.46%	LowerMid	Age 25-44	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC	White
Heartlanders		1168	3.17%	LowerMid	Age 45+	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Blue Highways		1040	2.82%	Downscale	Age 65+	Mostly Singles	Renter / SFDU, Hi-Rise Multi	H.S. Graduate	WC, Service, BC	White, Black
Old Glories		1	0.00%	Downscale	Age <35	Singles/Couples	Renter / SFDU, Lo-Rise Multi	H.S. Graduate	WC, Service, BC	White
Young and Rustic		1797	4.87%	LowerMid	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC	White, Black, Hispanic
American Classics		1	0.00%	LowerMid	Age 25-44	Married Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Kid Country, USA		3126	8.48%	LowerMid	Age <45	Families w/Kids	Mix / SFDU, Mobile	Some College	WC, Service, BC, Farm	White, Hispanic
Shotguns and Pickups		1381	3.74%	LowerMid	Age 25-44	Families w/Kids	Owner / SFDU, Mobile	H.S. Graduate	WC, BC, Farm	White
Suburban Pioneers		4	0.01%	LowerMid	Age <45	Mix, w/Kids	Mix / SFDU, Mobile	Elem. School, H.S.	WC, Service, BC	White, Black, Hispanic
Golden Ponds		441	1.20%	Downscale	Age 65+	Singles/Couples	Owner / SFDU, Mobile	H.S. Graduate	WC, Service, BC, Farm	White
Crossroads Villagers		1763	4.78%	Downscale	Age <45	Married Couples	Owner / SFDU, Mobile	Elem. School, H.S.	WC, Service, BC, Farm	White
Old Milltowns		1544	4.19%	Downscale	Age 65+	Singles/Couples	Mix / SFDU, Mobile	Elem. School, H.S.	WC, Service, BC	White, Black
Back Country Folks		680	1.84%	Downscale	Age 55+	Married Couples	Owner / SFDU, Mobile	Elem. School, H.S.	Service, BC, Farm	White, Black
Bedrock America		1738	4.71%	Downscale	Age <35	Families w/Kids	Mix / SFDU, Mobile	Elem. School, H.S.	Service, BC, Farm	White, Black, Hispanic

Figure 31: Market Segmentation Detail. Source: Claritas, Inc.

3.3 Demographic & Segmentation Observations

- Monroe's primary and secondary trade areas have experienced tremendous population growth since 1990 and the trends are projected to continue through the next five years. The entire region is growing at a fast rate, but the fastest growth is in Loganville, Newton & Barrow Counties, as well as the I-85 corridor.
- The City of Monroe, which makes up a portion of the local trade areas, is growing at a slower rate than the majority of the region, although still projected to grow by nearly 10 percent in the next five years.
- Income levels show growth potential as well. Monroe, Walton County, and the local trade areas all have experienced household income growth.
- On the other hand, the City of Monroe has the lowest median household income of the entire region (\$31,809) and the second lowest per capita income (\$17,204). At \$55,333, Walton County has nearly double the median household income of the City. It is not uncommon for a county or region to have more wealth than its urban center, but there does seem to be a large discrepancy in Monroe and Walton.
- Similarly, Monroe has significantly high poverty level with 19.8% of its families being below the poverty line. As a comparison, Walton County is less than 8%.
- It will be presented later in this report, but Monroe also has a lower median home value (\$110,810) than the majority of the region as well as Walton (\$153,185). The Secondary Trade Area has the second highest regional median housing value (\$169,579).
- While the City of Monroe shows a slower growth rate and lower income levels than the rest of the region, its downtown does reach a larger, more affluent market. This is evident from the zip code survey which suggests downtown's trade areas extend into higher growth areas, as well as the market segmentation analysis shown in this section.
- Nearly 30% of downtown Monroe's primary and secondary trade areas market segments are classified as upper-middle class to wealthy. Over half is middle class to wealthy.
- The market for downtown Monroe is predominantly younger singles and couples, as well as families.
- Monroe has a broad and diverse market and should attempt to provide a variety of business, retail and restaurant offerings to meet the needs of its customer base.

4.0 Housing Market

This section will take a look at a snapshot of the housing market in Monroe and Walton County in order to determine opportunities for residential growth and new housing investment in the community. General demographic trends will be presented first followed by an analysis of the existing market.

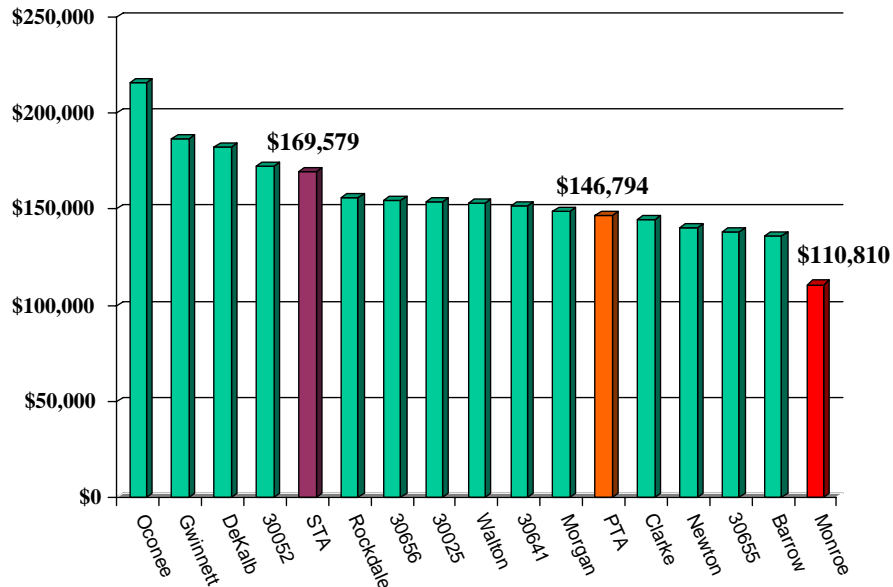


Figure 32: 2007 Median Housing Unit Value. Source: Claritas, Inc.

The table above shows regional median housing unit value for the current year. Oconee and Gwinnett Counties show the highest values. Monroe's STA is in the upper third at \$169,579, the PTA is \$146,794, and the City of Monroe has the lowest housing unit value at \$110,810. Walton County is in the middle with a unit value of just over \$150,000.

4.1 Housing Unit Growth

The two tables below show the number of units built by decade since 1940 for both the PTA and the City of Monroe. In the PTA, over 50% of the housing units have been constructed since 1990, and in fact shows a steady increase each decade since 1950. The median year built for PTA structures is 1990. 31% of all PTA housing has been built in the last eight years.

The City of Monroe has seen an additional 29% of its structures built since 1990. The growth rate has fluctuated from decade to decade, but the largest amount of growth has been in the past eight years. The median year built for Monroe is 1977.

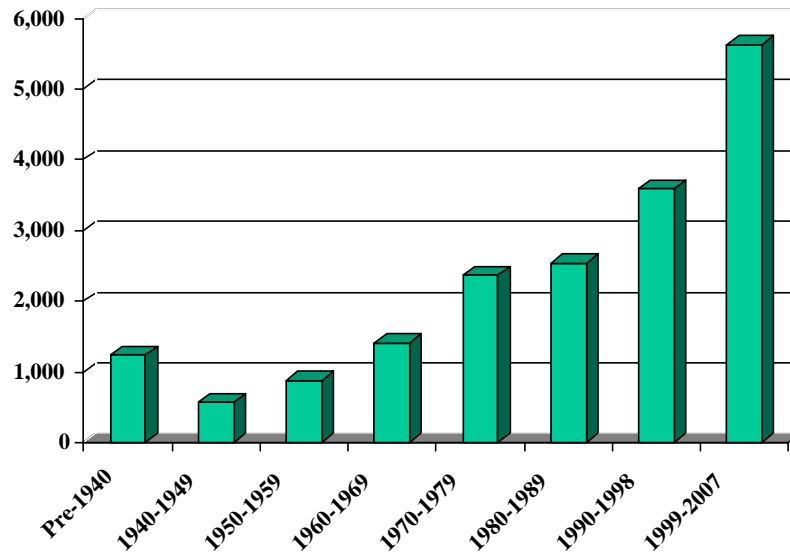


Figure 33: Housing Units by Year Built for Primary Trade Area. Source: Claritas, Inc.

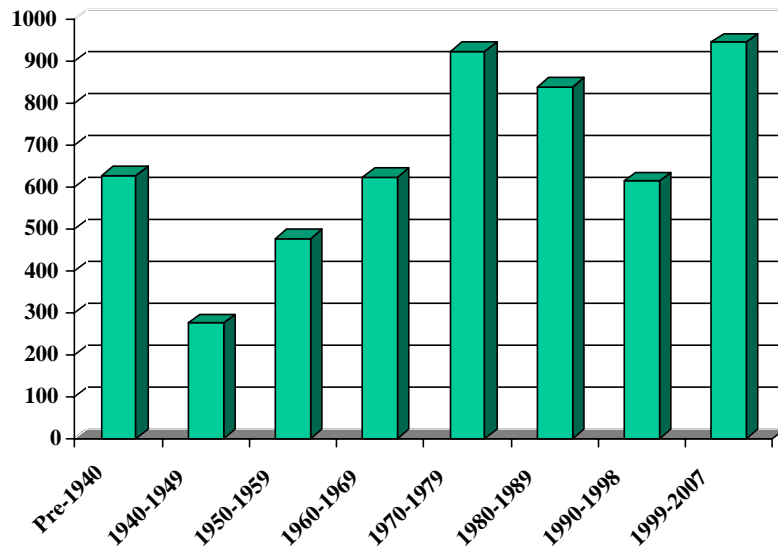


Figure 34: Housing Units by Year Built for City of Monroe. Source: Claritas, Inc.

Walton County is also showing significant growth in housing units. The next chart shows annual numbers of residential building permits from 1997 to 2002 for Walton County. These are building permits and do not necessarily correlate to construction, although it is a good indicator of growth in the residential market. There has been a 24.7% increase in the number of annual residential building permits in the past five years and 197% increase since 1990.

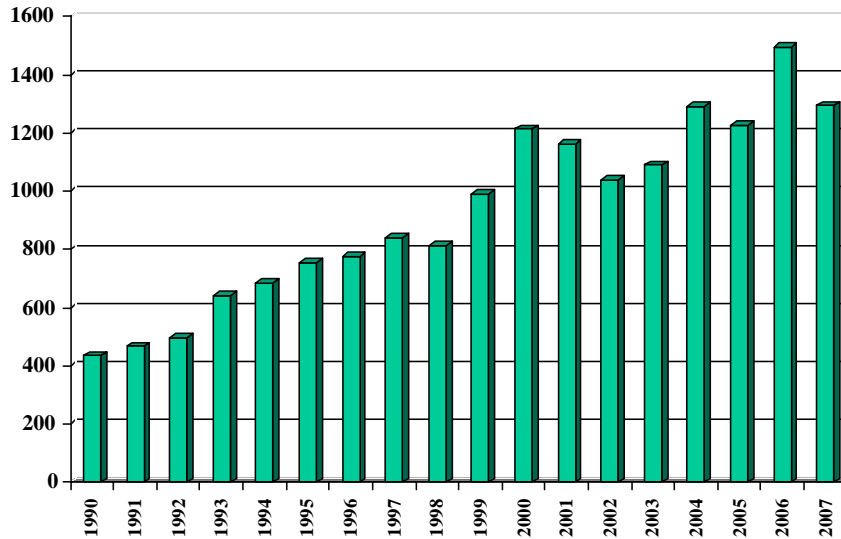


Figure 35: Total Residential Building Permits by Year for Walton County. Source: Walton County

4.2 Primary Trade Area Housing Demand

Housing Units	Census 2000		2007 Estimate	2012 Projection
Occupied	13,206	93.9%	18,058	22,546
Owner	9,348	66.5%	13,098	16,386
Renter	3,858	27.4%	4,960	6,160
Vacant	855	6.1%	1,016	1,005
Total	14,061	100%	19,074	23,551

Housing Units	2017 Projection	2017 Percent	Change 2007-2017	Total Annual Estimated Demand
Occupied	27,034	96.5%	8,976	898
Owner	19,674	70.2%	6,576	658
Renter	7,360	26.3%	2,400	240
Vacant	994	3.5%	-22	-2
Total	28,028	100%	8,954	895

Figure 36: Housing Projections for Primary Trade Area. Source: US Census. ESRI

The table above shows total annual estimated demand for the Primary Trade Area for both owner and renter occupied housing units. The 2017 projection is extrapolated from the increase in units from 2000 projected to 2012. Over the next ten years, there will be an annual demand of 895 housing units. 658 of these units will be owner occupied and 240 units for rental.

Unit Value	Census 2000	2007 Estimate	2012 Projection

> \$50,000	990	10.56%	873	515
\$50,000 - \$99,999	3,564	38.03%	2,001	1,611
\$100,000 - \$149,000	2,390	25.50%	3,795	3,800
\$150,000 - \$199,999	1,087	11.60%	2,179	1,095
\$200,000 - \$249,999	462	4.93%	1,659	2,098
\$250,000 - \$299,999	324	3.46%	840	1,410
\$300,000 - \$399,999	275	2.93%	702	1,252
\$400,000 - \$499,999	111	1.18%	437	777
\$500,000 - \$749,999	94	1.00%	374	634
\$750,000 - \$999,999	39	0.42%	92	348
\$1,000,000 +	35	0.37%	146	256
	9,371	100%	13,098	13,796

Unit Value	2017 Projection	2017 Percent	Change 2007-2017	Total Annual Estimated Demand
> \$50,000	651	3.3%	-222	-22
\$50,000 - \$99,999	1,221	6.2%	-780	-78
\$100,000 - \$149,000	3,805	19.3%	10	1
\$150,000 - \$199,999	4,697	23.9%	2,518	252
\$200,000 - \$249,999	2,537	12.9%	878	88
\$250,000 - \$299,999	1,980	10.1%	1,140	114
\$300,000 - \$399,999	1,802	9.2%	1,100	110
\$400,000 - \$499,999	1,117	5.7%	680	68
\$500,000 - \$749,999	894	4.5%	520	52
\$750,000 - \$999,999	604	3.1%	512	51
\$1,000,000 +	366	1.9%	220	22
	19,674	100%	6,576	658

Figure 37: PTA Housing Demand by Unit Value. Source: US Census. ESRI

The table above shows housing demand by range of unit value for the Primary Trade Area. The table shows a decrease in demand for units under \$150,000. Over the next ten years, 38% of the annual demand will be for units in the \$150,000 to \$200,000. 47% of annual demand will be for units between \$200,000 and \$400,000.

Units in Structure	Housing Units		Occupied Units	
	Number	Percent	Number	Percent

Single Family	Detached	10,663	75.8%	10,084	76.3%
	Attached	192	1.4%	179	1.4%
	Mobile Home	1,501	10.7%	1,410	10.7%
Duplex	2	923	6.6%	832	6.3%
Multifamily	3 to 4	367	2.6%	331	2.5%
	5 to 9	330	2.3%	287	2.2%
	10 to 19	38	0.3%	38	0.3%
	20 to 49	37	0.3%	37	0.3%
	50 or More	21	0.1%	21	0.2%
		14,072	100.00%	13,219	100.00%

Occupied Units In Structure		2007	2012	2017	Total Annual Estimated Demand
Single Family	Detached	13,775	17,199	20,623	685
	Attached	245	305	366	12
	Mobile Home	1,926	2,405	2,884	96
Duplex	2	1,137	1,419	1,702	56
Multifamily	3 to 4	452	565	677	22
	5 to 9	392	490	587	19
	10 to 19	52	65	78	3
	20 to 49	51	63	76	3
	50 or More	29	36	43	1
		18058	22546	27034	898

Figure 38: Housing Demand by Unit Type. Source: ESRI

In the next ten years, 76% of the annual demand for housing units will be for single-family detached units. With 96 units, just over 10% of the annual demand will be for mobile homes. There will be a demand each year for 105 multi-family units.

4.3 Current Housing Market

The Georgia and Walton County Multiple Listing Service points to the most up to date and current trends in the housing market. The table below indicates that Walton has the third most number of current listings within the region with an average price of \$269,385. Over the past twelve months, there have been 1371 sales with an average price of \$202,490. This does include both new homes and existing homes, but appears to be right in line with the Walton County building permit data and projected annual demand for housing units.

Georgia MLS Listings

	Current Listings	Average Listing	Last 12 Months	Average Sales Price
Gwinnett	9635	\$294,730	10755	\$226,419
Newton	2016	\$206,141	2023	\$174,662
Walton	1479	\$269,385	1371	\$202,490
Rockdale	1401	\$282,976	1311	\$232,200
Barrow	1124	\$209,947	1620	\$157,070
Clarke	598	\$222,058	701	\$174,386
Oconee	399	\$392,699	264	\$314,928
Morgan	232	\$459,450	168	\$247,835

Figure 39: Current Regional Housing Market. Source: Georgia MLS

Walton County Current MLS

Pricepoint	New Construction	Total Units	Percent
Homes			
<100	1	58	4%
100-200	147	555	37%
200-300	234	417	28%
300-400	143	277	18%
400-500	36	94	6%
500-750	13	73	5%
750 +	3	24	2%
Total		1498	100%
Condo/Townhome			
100-200	6	15	94%
200-300	0	1	6%
Total		16	100%
Residential Rental			
<1k	0	3	23%
1k-2k	0	9	69%
>2k	0	1	8%

Figure 40: Current Walton County Housing Market. Source: Georgia MLS

The table above breaks down the current homes for sale in Walton County by new construction, price point, and unit type. There are currently 577 new units for sale in Walton County, which almost identically mirrors the projected annual demand. Similarly,

the price point data supports the projected demand with 65% of the current for sale housing market being between \$100,000 - \$300,000. Another 31% is with units higher than \$300,000.

A sample of unit types for sale currently in the county include:



Existing and new town homes begin around \$150,000 while new single-family detached are advertised in subdivisions as being “from the 200’s” and higher.

Also, while not easily found in the primary trade area, there are regional examples of high end town home and adaptive reuse projects such as the James Madison Inn in Madison with individual units going for \$250,000.



There could also be the potential in Monroe and within the LCI study area to adaptively reuse the two mills as residential or mixed-use developments. These types of projects do not have to be in urban areas to be successful. A case study from a peer community is the Renfro Lofts project in Mount Airy, NC. Mount Airy is along I-77 two hours north of Charlotte and forty-five minutes from Winston-Salem. The town of about 10,000 people had an old tobacco warehouse downtown that has been redeveloped as high-end residential condominiums.



The warehouse was renovated in 2002 with 37 condominium units now with a tax value of over \$6 million. The innovated project used “pass-through” rehabilitation tax credits whereby the developer was able to pass along the ownership of tax credits used for redevelopment on to the individual owners of the condo units. The project sold all units pre-construction within just 120 days and is considered one of the most successful, small town rehabs in the Southeast.

4.4 Housing Market Observations

- Like population, housing units in Monroe's primary trade area and Walton County have grown at a fast rate since 1990. In fact, in the PTA, over 50% of all housing units have been constructed since 1990. Housing unit growth in the City of Monroe has been slower. Housing and population growth will continue for the next ten year with projected annual demand of 895 units in the primary trade area. 73.5% of this demand will be for owner occupied units.
- The majority of demand for owner occupied housing will be for units with a price point between \$150,000 and \$400,000. 38% of the annual demand will be for units in the \$150,000 to \$200,000 while 47% of annual demand will be for units between \$200,000 and \$400,000. The current market in Walton County supports these demand numbers.
- The overwhelming majority of the demand will be for single family detached housing (about 76%). Each year in the PTA, there will be a need for 104 additional multi-family units of varying types. There also a smaller market for single-family attached, or town home type developments, at least 12 units per year.
- All demand projections are based on trends since 1990, when the area has seen such dramatic growth. While these numbers seem to be supported by the housing unit sales in Walton County over the past twelve months, it should be noted that these projections do not factor in the recent housing slump that has affected both the greater Atlanta and nationwide markets.
- In the LCI area, there would be the opportunity to diversity the housing market by developing and marketing housing types that will meet the needs of target market segments, specifically the Fast-Track Families, New Homesteaders, and Young Influentials. These segments in particular like urban and mixed use housing types.
- Similarly, there is still the need to follow the recommendations of the Redevelopment Plan completed in 2001 which stated, "The primary goal of this redevelopment plan is the redevelopment of the blighted and slum areas existing within the project area. This would include the provision of various housing types such as market-rate private housing, subsidized housing, and elderly housing. New housing will be provided and existing substandard housing will be revitalized. The redevelopment of substandard housing could include property acquisition for demolition as well as land assembly for the planned revitalization of contiguous areas."

5.0 Employment Snapshot

This section presents employment data and patterns for Monroe's primary trade area, as for Walton County.

5.1 Employment Totals and Labor Force

Business Description	Establishment	Employees	Sales (in Millions)	Establishments 20+ Employees	Percentage
All Manufacturing	43	1,965	134	14	2.79%
All Retailing	295	3,230	393	30	19.12%
Public Administration	85	1,375	0	19	5.51%
All Agriculture	49	291	16	2	3.18%
Mining	0	0	0	0	0.00%
Constructions	194	1,259	227	12	12.57%
Transportation/Public Utilities	71	1,035	118	14	4.60%
Wholesale Trade	63	756	126	4	4.08%
Financial, Insurance, Real Est	144	1,022	210	9	9.33%
Services	562	5,040	446	53	36.42%
Non- Classifiable	37	276	0	1	2.40%
All Industries	1,543	16,249	1,669.4	158	100%

Figure 41: 2007 PTA SIC Summary. Total Employment. Source: Claritas, Inc

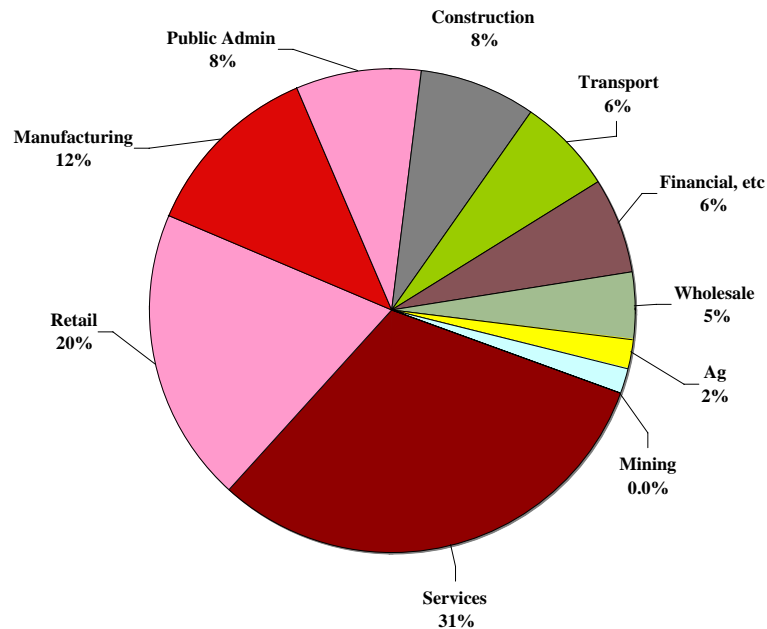


Figure 42: 2007 Employment by SIC Category. Source: Claritas, Inc.

Business Description	Establishment	Employees	Percentage
Health Services	75	1,563	10%
Educational Services	32	1,209	7%
Eating and Drinking Places	56	900	6%
Construction-Special Trade Contractors	127	841	5%
Justice, Public Order and Safety	28	635	4%
Automobile Dealers and Gas Service Stations	51	619	4%
Miscellaneous Manufacturing Industries	4	535	3%
Building Materials, Garden & Mobile Homes	28	521	3%
Electric, Gas and Sanitary Services	15	446	3%
Membership Organizations	102	428	3%
Wholesale Trade-NonDurable Goods	17	423	3%
General Merchandise Stores	18	413	3%
Real Estate	70	410	3%
Exec., Leg. and Gen. Govt.	37	409	3%
Social Services	34	407	3%
Food Stores	40	374	2%
Business Services	64	350	2%
Wholesale Trade-Durable Goods	46	333	2%
Textile Mill Products	1	300	2%

Figure 43: 2007 Largest Employers by SIC Subcategory. Source: Claritas, Inc.

The majority of the PTA employment is in the categories of Services, Retail, and Manufacturing. These categories make up 63% of all employment within the trade area. The key subcategories are shown above, and are primarily health services, majority of Walton County employees are in Health Services, Education, Retail, and Construction. Subcategories with employee numbers above 300 are shown above.

Walton County Major Employers	
Walton County Board of Education	2374
Wal-Mart Distribution	975
Walton County Government	517
Wal-Mart Loganville	425
Wal-Mart Monroe	406
Walton Regional Medical Center	355
Standridge Color	347
Leggett & Platt	304
Social Circle Schools	243
Goodyear Tire	237
City of Monroe	225

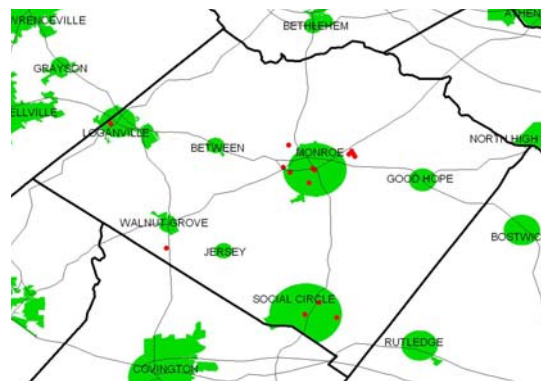


Figure 44: Walton County Largest Employers. Source: Walton County Development Authority

Walton's largest employers are government (Board of Education and County Administration) and Wal-Mart distribution and Wal-Mart retail stores. Most of Walton's major employers are located in or around Monroe.

County	Labor Force	Employed	Unemployed	Rate
Walton	39,106	37,343	1,763	4.5%
Barrow	31,655	30,333	1,322	4.2%
Gwinnett	412,993	396,127	16,866	4.1%
Morgan	9,354	8,941	413	4.4%
Newton	43,897	41,589	2,308	5.3%
Oconee	17,878	17,328	550	3.1%
Rockdale	40,426	38,430	1,996	4.9%
Georgia	4,741,860	4,522,025	219,835	4.6%
US	151,428,000	144,427,000	7,001,000	4.6%

Figure 45: Labor Force. Annual Averages. Source: GA Dept of Labor. US Bureau of Labor Statistics

Walton's Unemployment rate is on par with state and national averages, but slightly higher than most of the nearby counties.

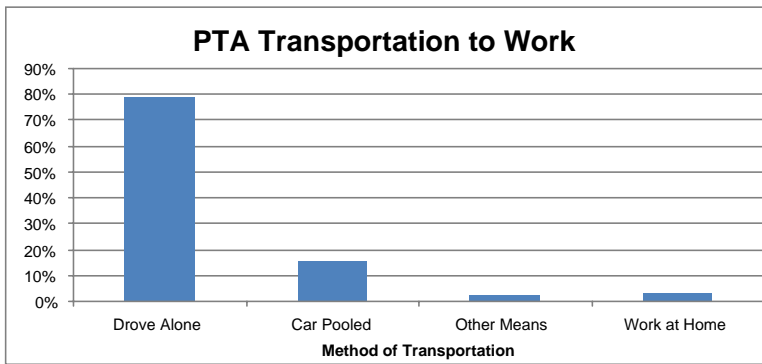
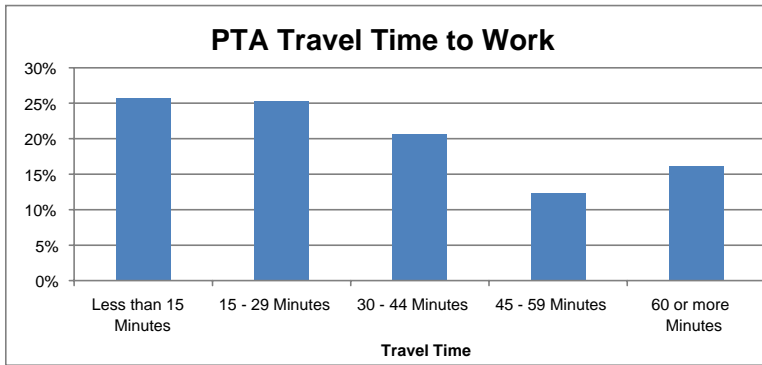
5.2 Commuting Patterns

Walton Residents - County where employed

Walton	11,204	38.6%
Gwinnett	7,037	24.2%
Dekalb	2,978	10.3%
Fulton	1,666	5.7%
Rockdale	1,645	5.7%
Newtown	1,089	3.8%
Clarke	895	3.1%
Barrow	554	1.9%
Cobb	283	1.0%
Morgan	256	0.9%
Clayton	254	0.9%
Oconee	189	0.7%
Hall	124	0.4%
Forsyth	121	0.4%
Other	736	2.5%
	29,031	100%

Place of Residence of Persons Working In Walton County

Walton	11,204	69.9%
Gwinnett	1,207	7.5%
Newton	755	4.7%
Barrow	443	2.8%
Morgan	410	2.6%
Clarke	387	2.4%
Dekalb	249	1.6%
Rockdale	246	1.5%
Oconee	241	1.5%
Other	876	5.5%
	16,018	100%



Walton's commuting patterns suggest many residents are employed in other communities. 62% of Walton County's workforce commutes outside of the county, the majority to Gwinnett and Dekalb. Nearly half of the workforce has a daily one-way commute of at least thirty minutes.