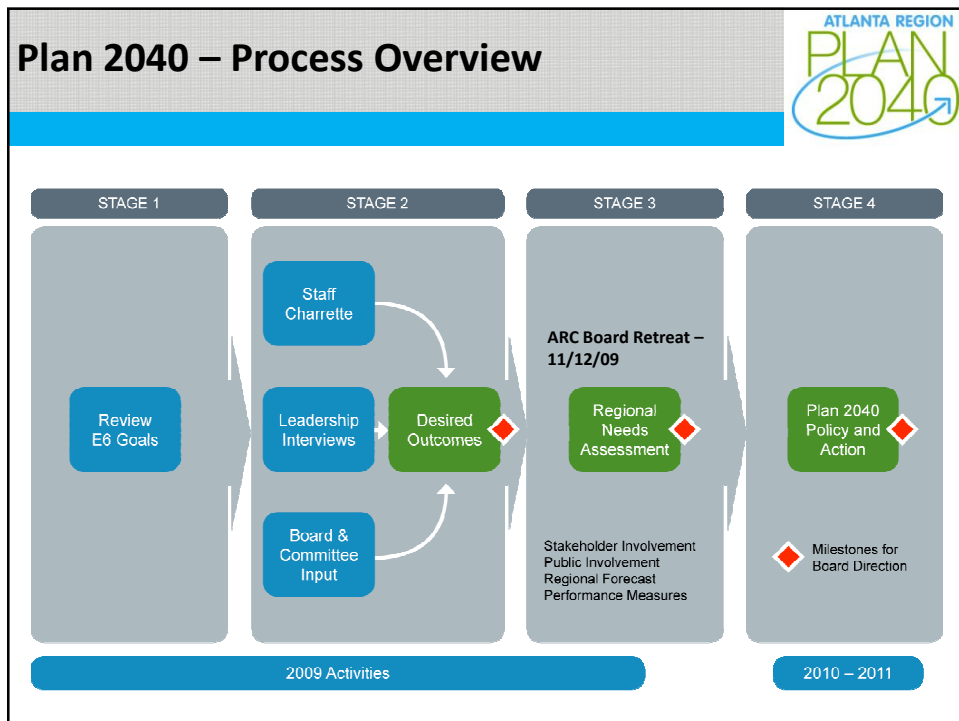


Plan 2040 Mini-Retreat Supplemental Material

November 12th, 2009



Regional Assessment – Consistent Themes



Theme 1: Develop solutions that address the social, environmental and economic needs of the region while protecting the region's resources and prosperity for future generations.

Theme 2: Providing access to safe, affordable, and efficient transportation choices.

Theme 3: Governing collaboratively to address funding issues and effectively implement regional plans.

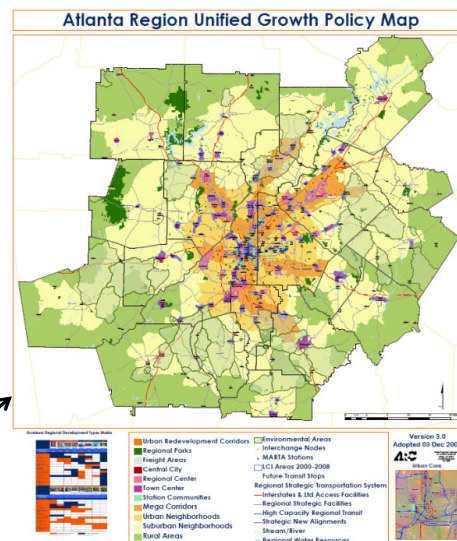
Plan 2040 Ties Together Two Important Individual Efforts...RDP and RTP



Regional Development Plan

- RDP Integrates Diverse Local, Regional and State Issues
- Coordinates Local Comprehensive Plans and Development Rules
- Follows State Regional Planning Rules

The UGPM Provides Framework For Regional Planning Decisions



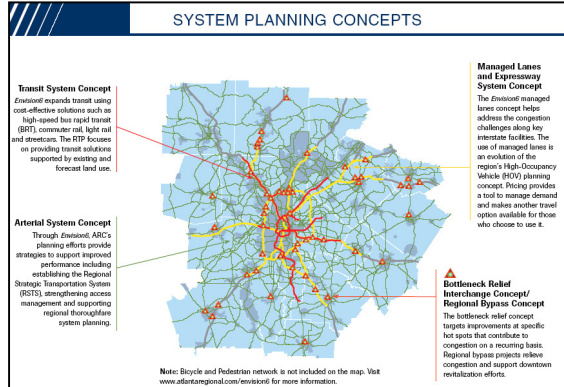
Plan 2040 Ties Together Two Important Individual Efforts...RDP and RTP



Regional Transportation Plan

- Identifies Future Transportation Projects/Programs
- Required by Federal Government
- Helps Implement Growth Vision from RDP

System Planning Concepts Form the Foundation of the RTP




Plan 2040 Regional Assessment Examines Important Issues



*Board Receives Draft Document January 2010


- Population
- Economy and Workforce
- Housing
- Transportation
- Public Facilities
- Intergovernmental Issues
- Development and Design
- Energy
- Others issues as directed by ARC Board

Supplemental Materials Include...



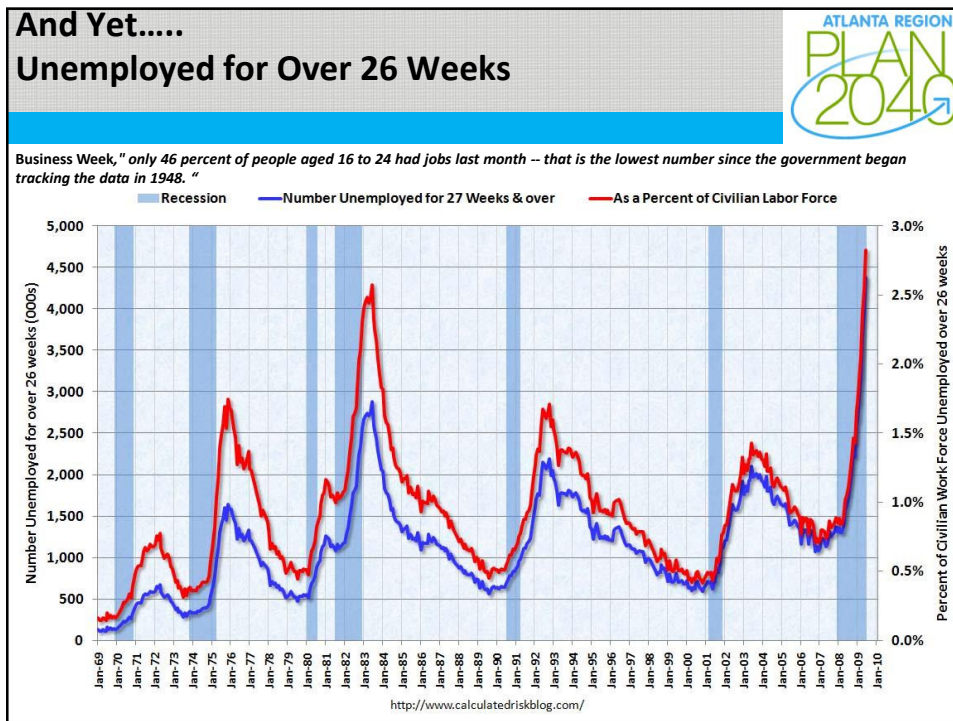
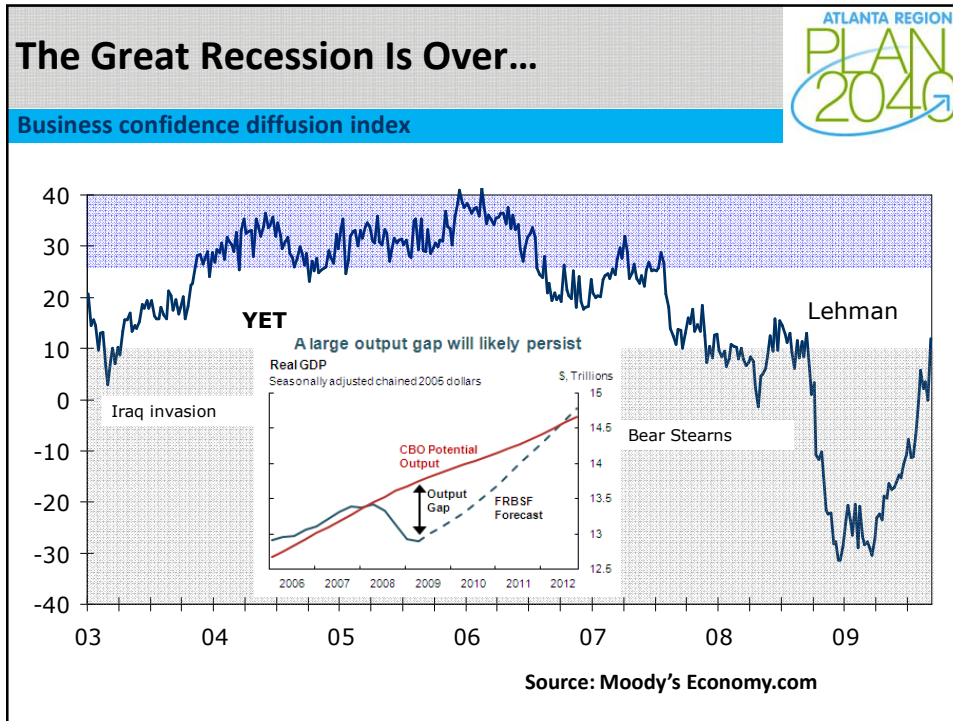
- **Economy – Big Picture**
- **Current Economic Challenges**
- **Growth and Development**
- **Housing and Building Trends**
- **Transportation**
- **Financial Challenges**
- **Past Planning Overview**

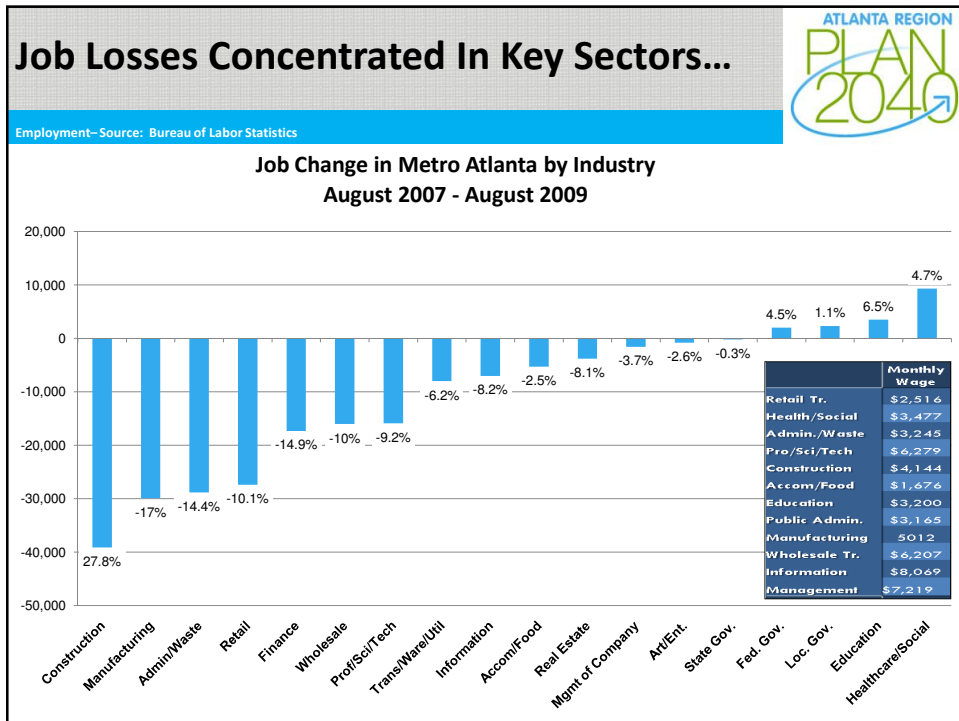
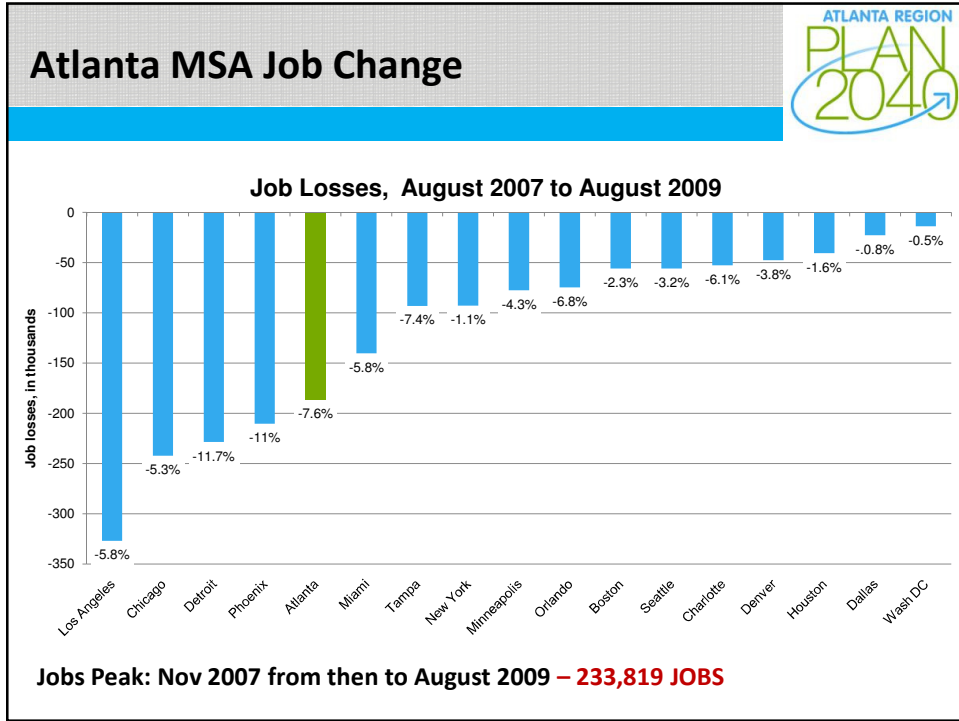
Only Region Experiencing More Population Growth This Decade...Dallas

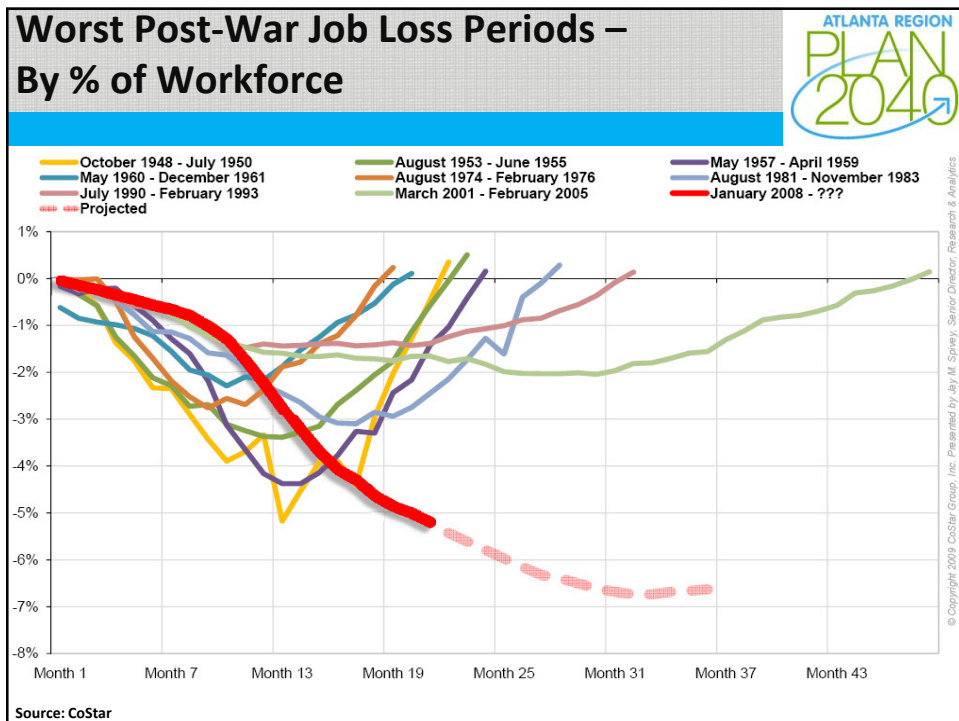
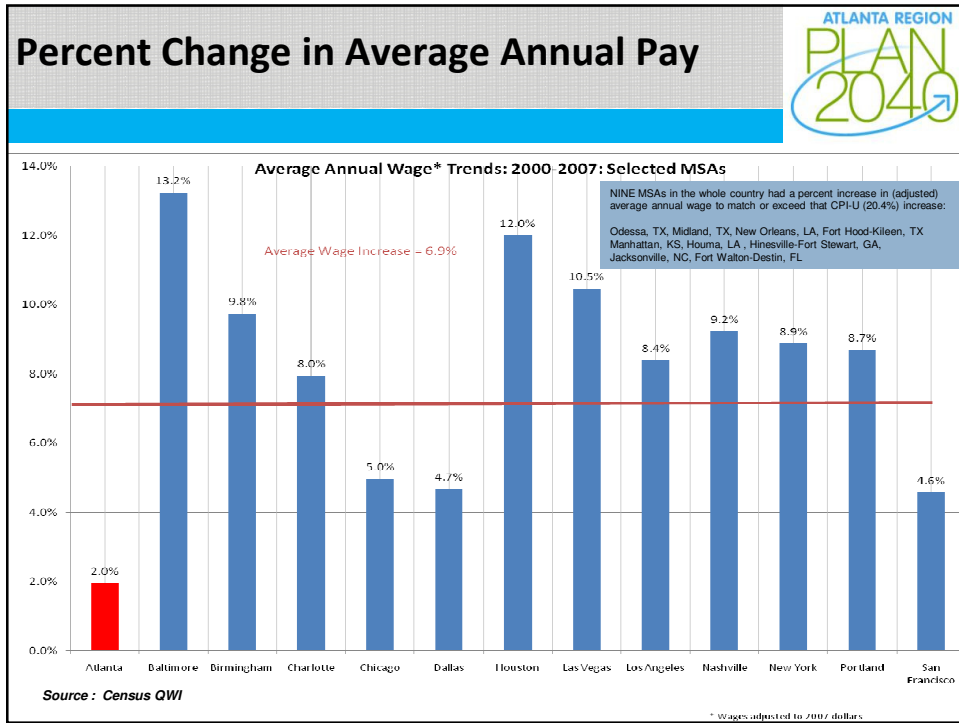


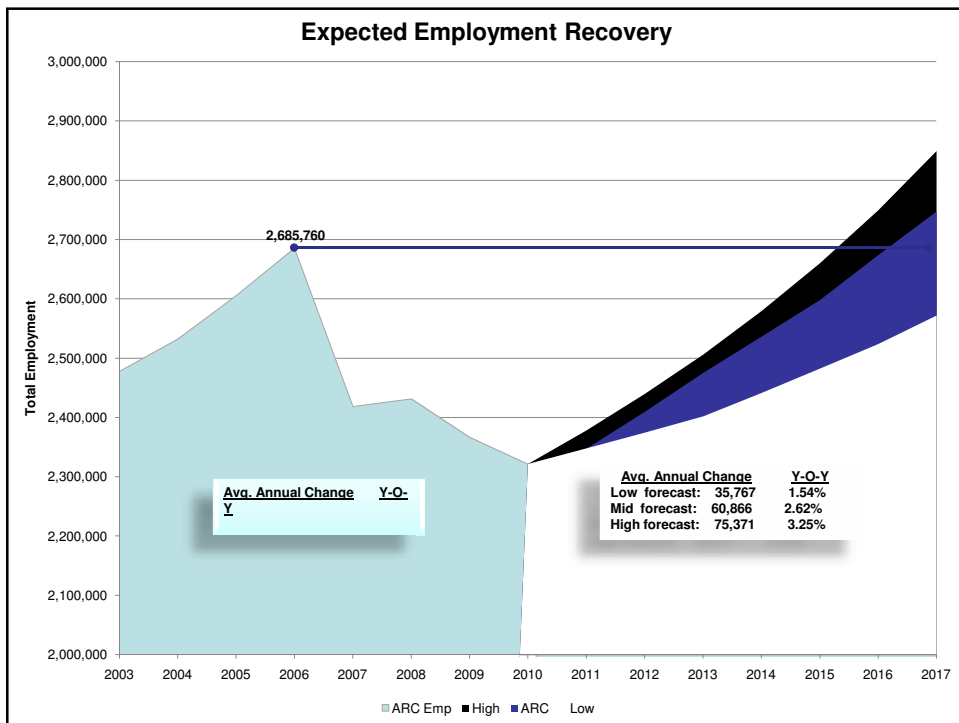
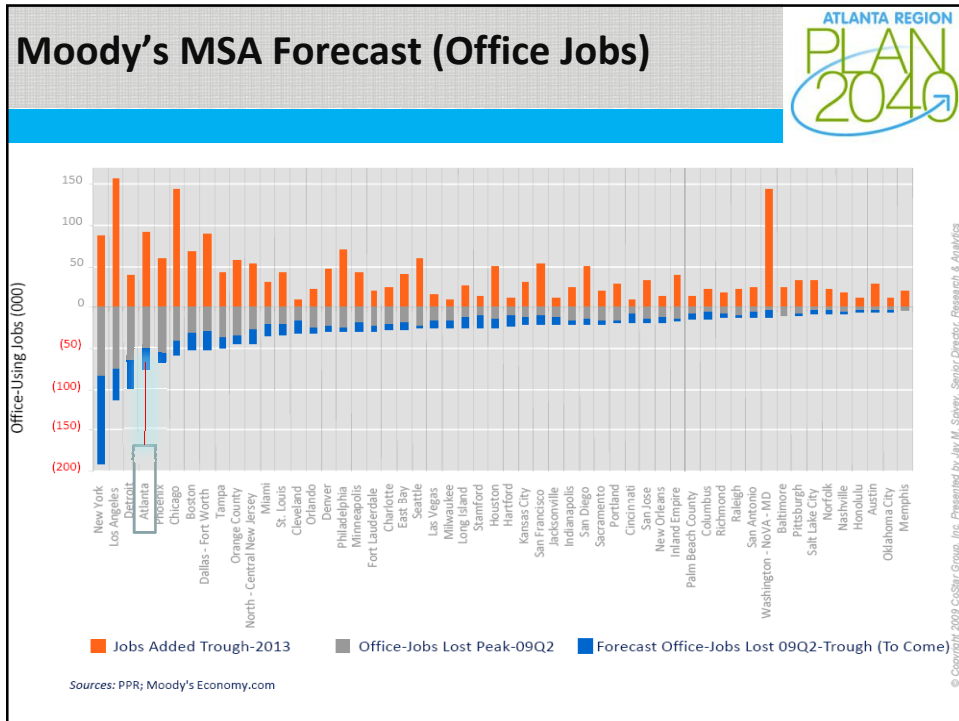
Metro Area	Population Change 2000 - 2007	Rank	Total Population 2007	Rank
Dallas	1,138,476	1	6,144,489	4
Atlanta	1,128,271	2	5,271,550	8
Phoenix	1,030,012	3	4,179,427	9
Houston	1,012,726	4	5,629,127	5
Riverside	861,054	5	4,081,371	10
New York	683,407	6	18,815,988	1
Wash DC	562,065	7	5,306,125	7
Los Angeles	507,184	8	12,875,587	2
Las Vegas	490,211	9	1,836,333	13
Chicago	470,995	10	9,522,879	3
Orlando	410,027	11	2,032,496	12
Miami	406,780	12	5,413,212	6
Austin	402,855	13	1,593,400	15
Charlotte	371,274	14	1,650,667	14
Tampa	337,750	15	2,723,949	11

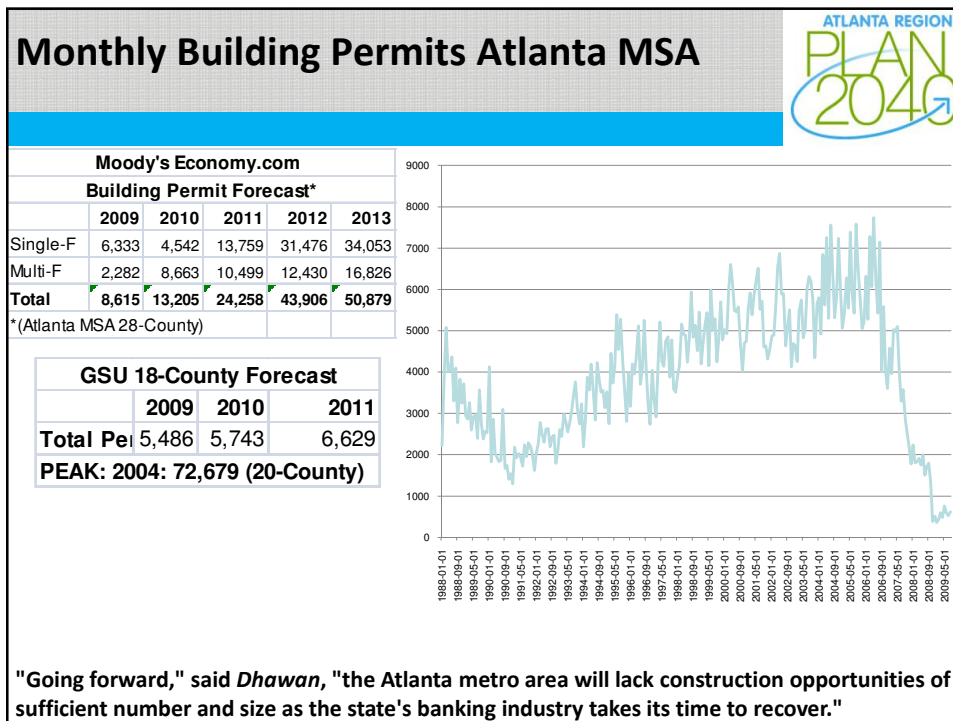
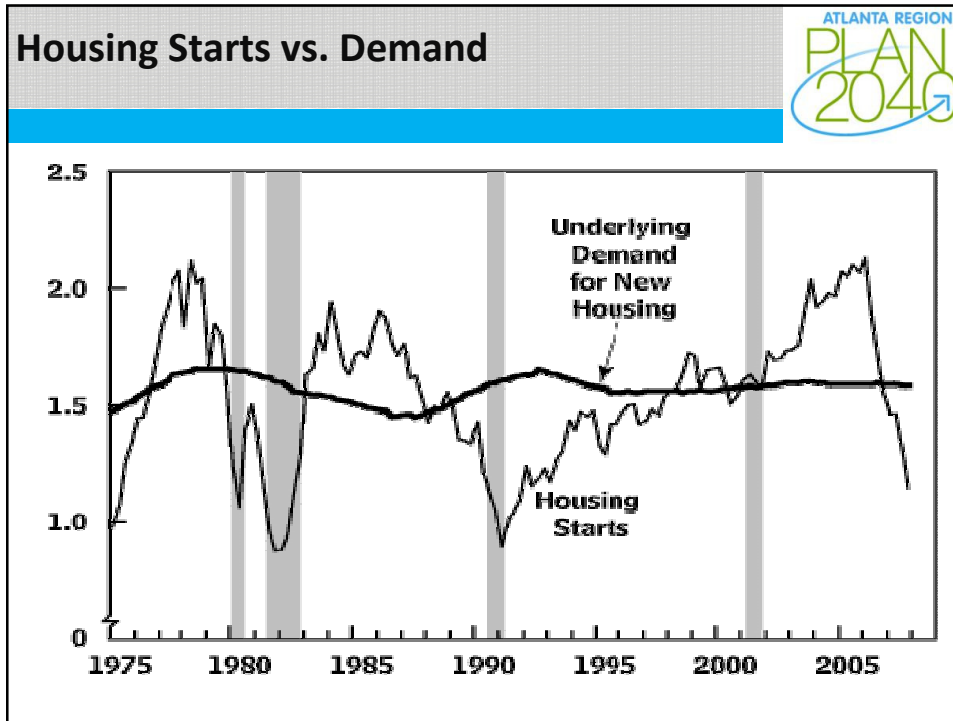
Decade's Growth Dwarfs That of Smaller Regional Business Centers



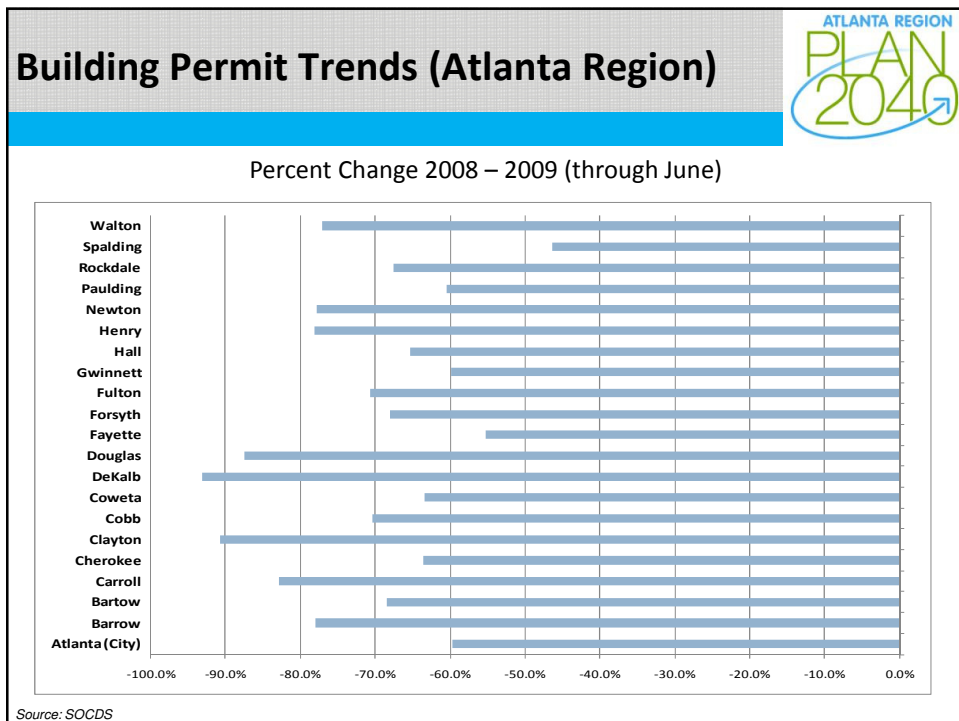
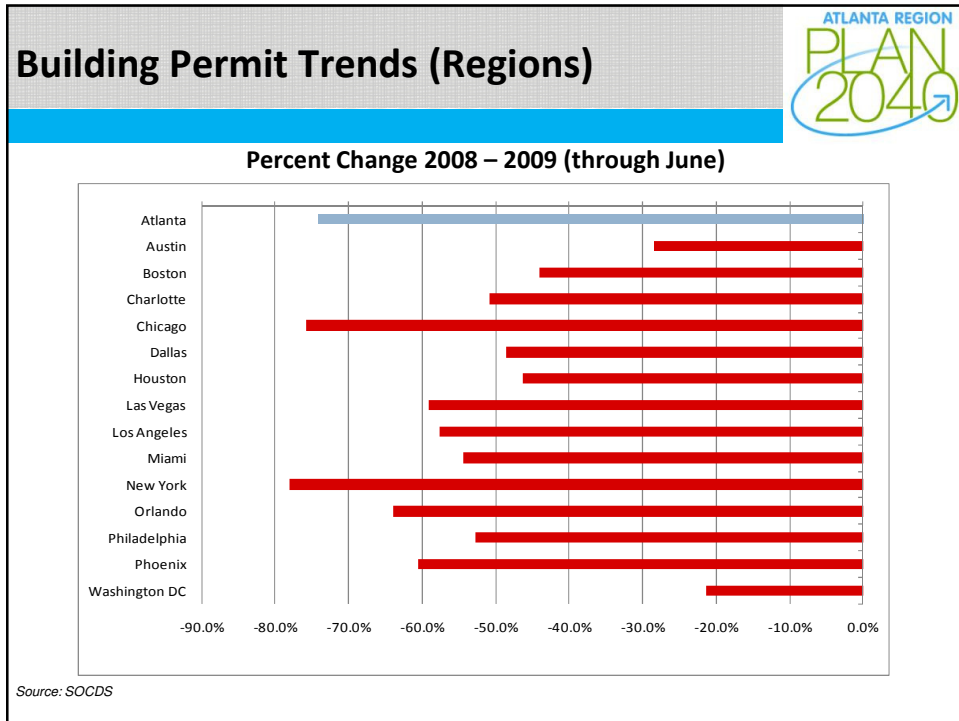








"Going forward," said *Dhawan*, "the Atlanta metro area will lack construction opportunities of sufficient number and size as the state's banking industry takes its time to recover."

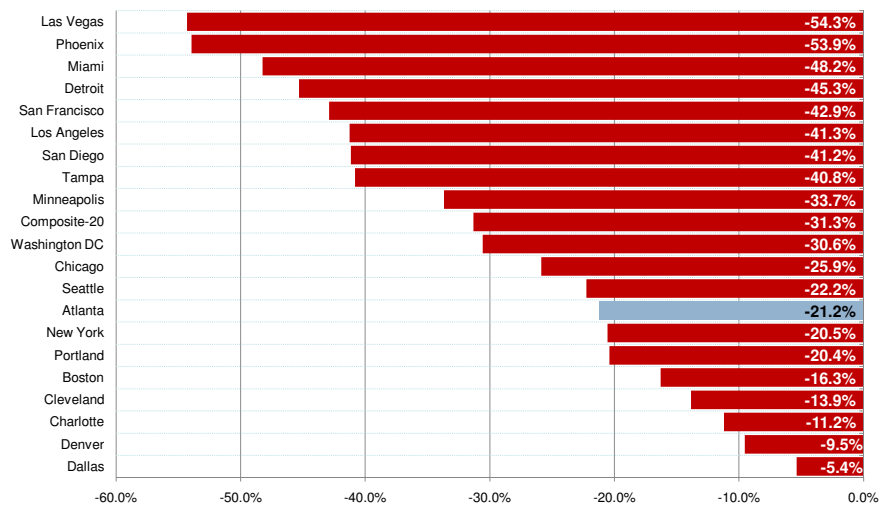


Building Permits – Recent History

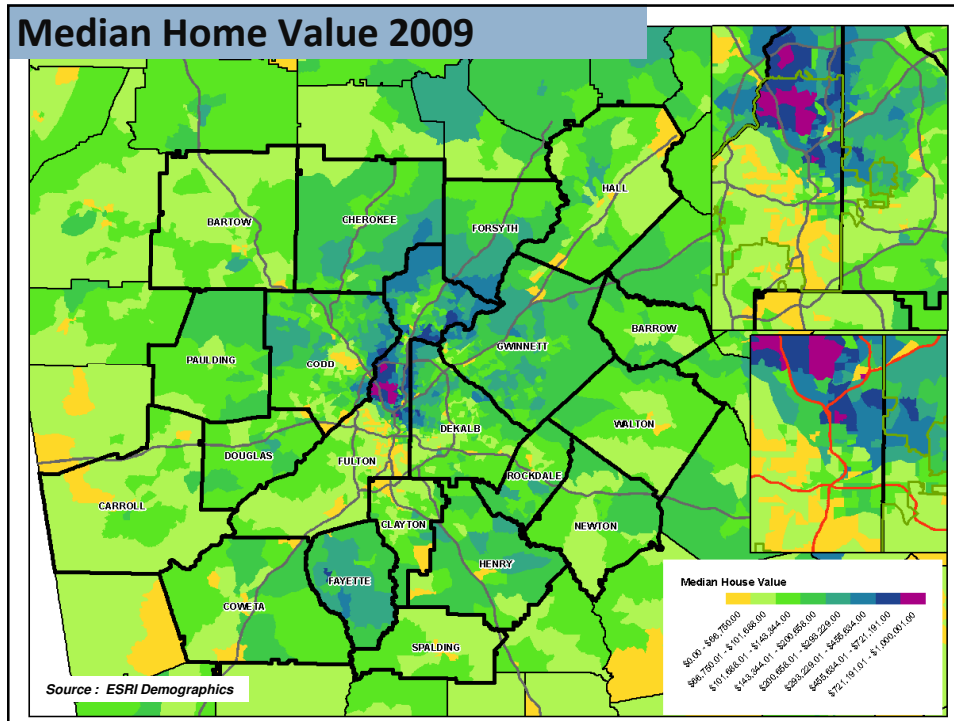


	Land Area (SQMI)	1990	1995	2001	2002	2003	2004	2005	2006	2007	2008	Peak to 2008	% Change	Total BP 2001-2008	Thru June 08	Thru June 09	% Change
Atlanta	132			6,794	6,649	6,893	9,726	7,974	10,779	9,297	2,370	-8,409	-78%	60,482	1,359	549	-59.7%
Cherokee	424	1,052	2,378	3,611	3,795	3,804	4,084	4,162	3,580	2,231	912	-3,250	-78%	26,179	545	186	-65.9%
Clayton	143	1,400	1,066	2,111	3,240	2,579	3,014	2,114	2,240	1,254	403	-2,837	-88%	16,955	306	29	-90.5%
Cobb	340	2,845	8,251	5,657	5,556	5,963	6,889	6,142	4,538	2,945	1,068	-5,821	-84%	38,758	777	221	-71.6%
DeKalb	268	3,646	2,715	7,575	7,237	5,106	6,719	6,336	4,555	4,912	3,782	-3,793	-50%	46,222	2,207	131	-94.1%
Douglas	199	559	682	1,342	3,059	2,145	1,874	1,915	1,863	916	584	-2,475	-81%	13,698	501	63	-87.4%
Fayette	197	817	1,156	1,001	921	907	955	911	650	470	114	-887	-89%	5,929	68	27	-60.3%
Fulton (Minus Atlanta)	529	6,192	8,820	4,061	4,175	5,403	7,193	8,140	7,853	3,536	2,278	-5,862	-72%	42,639	1,454	274	-81.2%
Gwinnett	433	4,022	9,828	9,901	10,362	9,617	10,463	9,938	8,956	4,361	1,921	-8,542	-82%	65,519	976	400	-59.0%
Henry	323	1,292	2,133	3,781	4,689	4,466	3,855	3,903	3,165	2,418	710	-3,979	-85%	26,987	467	121	-74.1%
Rockdale	131	635	908	807	1,033	903	633	1,021	1,009	608	154	-879	-85%	6,168	71	23	-67.6%
Coweta	443	817	1,327	2,164	1,659	1,994	1,984	2,057	1,847	1,378	451	-1,713	-79%	13,534	278	93	-66.5%
Forsyth	226	678	2,803	2,539	2,448	3,147	3,085	4,173	4,770	2,877	1,478	-3,292	-69%	24,517	1,273	339	-73.4%
Paulding	313	969	1,597	2,622	2,915	2,763	3,103	3,454	3,366	1,652	583	-2,871	-83%	20,458	323	122	-62.2%
Barrow	162	257	255	950	1,227	1,348	1,358	1,416	1,115	860	283	-1,133	-80%	8,557	227	50	-78.0%
Barrow	459	554	1,273	1,418	1,153	1,186	1,099	1,085	1,053	604	360	-1,058	-75%	7,958	234	77	-67.1%
Carroll	499	439	483	2,343	1,908	1,750	1,920	1,655	1,365	637	279	-2,064	-88%	11,857	189	33	-82.5%
Hall (1)	394	630	1,214	1,805	1,830	1,830	1,758	2,029	1,505	1,301	738	-1,291	-64%	12,796	NA	NA	NA
Newton	276	658	797	1,736	2,347	2,263	1,929	2,115	1,678	956	189	-2,158	-92%	13,213	123	28	-77.2%
Spalding	198	261	241	541	456	506	549	445	562	301	197	-365	-65%	3,557	136	73	-46.3%
Walton	329	563	942	1,423	1,302	1,460	1,353	1,664	1,379	798	181	-1,483	-89%	9,560	132	31	-76.5%
10-County	2,987	22,460	37,937	46,641	50,716	47,786	55,405	52,556	49,188	32,948	14,296	-41,109	-74%	349,536	8,731	2,023	-76.8%
20-County (2)	6,286	28,286	48,869	64,182	67,961	66,033	73,543	72,649	67,828	44,312	19,035	-54,508	-74%	475,543	11,646	2,869	-75.4%
Outer Ten (2)	3,299	5,826	10,932	17,541	17,245	18,247	18,138	20,093	18,640	11,364	4,739	-15,354	-76%	126,007	2,915	846	-71.0%
Georgia	57,906	41,251	72,225	93,059	97,523	96,704	107,644	109,336	104,200	73,165	35,368	-73,968	-68%	716,999	20,994	8,432	-59.8%
10-Cty % of State	5%			50%	52%	49%	51%	48%	47%	45%	40%			49%	42%	24%	
20-Cty % of State	11%			69%	70%	68%	68%	66%	65%	61%	54%			66%	55%	34%	

Home Prices – Case-Shiller Index



June 2009



Foreclosures 2008


Source: RealtyTrac

ATLANTA REGION PLAN 2040

Top 100 U.S. Metro Foreclosure Market Data - 2008

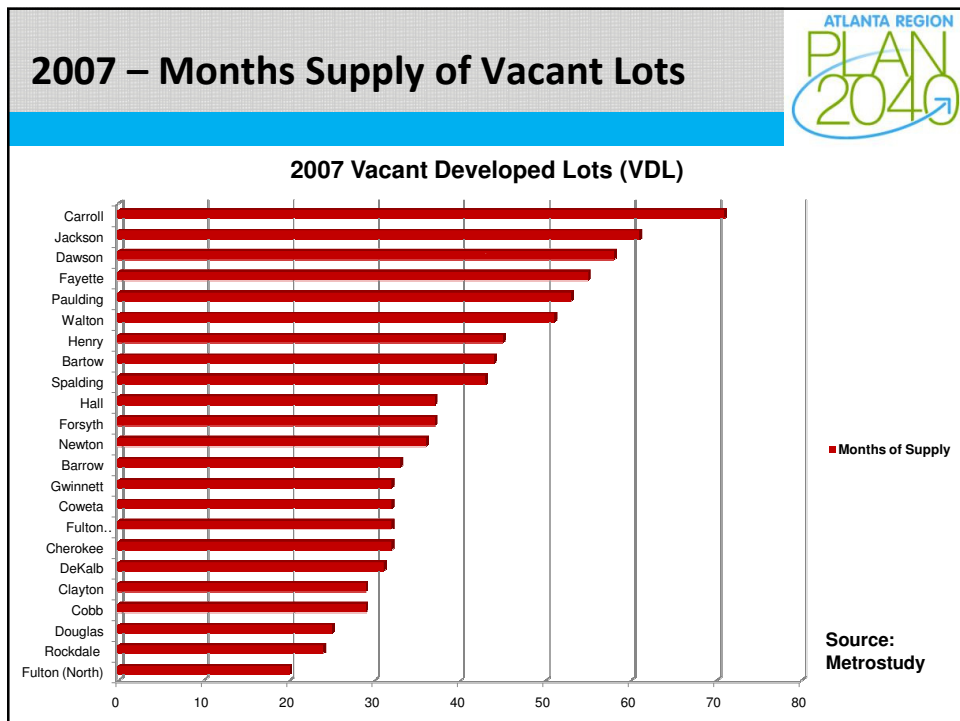
Rate Rank	State	Metro Name	Total Properties with Filings	%Housing Units (foreclosure rate)	%Change from 2007
1	CA	STOCKTON	21,127	9.46	99.16
2	NV	LAS VEGAS	67,223	8.89	121.31
3	CA	RIVERSIDE	112,284	8.02	117.02
4	CA	BAKERSFIELD	16,208	6.17	115.42
5	AZ	PHOENIX/MESA	97,684	6.02	220.77
6	FL	FORT LAUDERDALE	47,387	5.95	127.81
7	FL	ORLANDO	46,843	5.48	195.84
8	FL	MIAMI	49,697	5.21	96.46
9	CA	SACRAMENTO	39,876	5.2	67.74
10	MI	DETROIT	38,106	4.52	-7.67
11	FL	SARASOTA	17,256	4.5	153.58
12	CA	FRESNO	12,571	4.2	102.5
13	FL	TAMPA	53,630	4.14	122.66
14	CA	OAKLAND	38,797	4.09	99.34
15	CA	SAN DIEGO	44,931	3.99	122.24
16	FL	PALM BEACH	23,399	3.71	96.33
17	GA	ATLANTA	67,007	3.26	33.29
18	TN-MS-AR	MEMPHIS	17,245	3.21	52.73
19	CO	DENVER	32,920	3.2	23.61
20	CA	VENTURA	8,422	3.11	94.01
21	CA	ORANGE	31,300	3.06	150.38
22	FL	JACKSONVILLE	17,025	2.99	78.46
23	DC-MD-VA-WV	WASHINGTON DC	50,148	2.97	160.79*
24	OH	CLEVELAND	27,693	2.94	-0.56
25	MI	WARREN	30,817	2.92	42.63

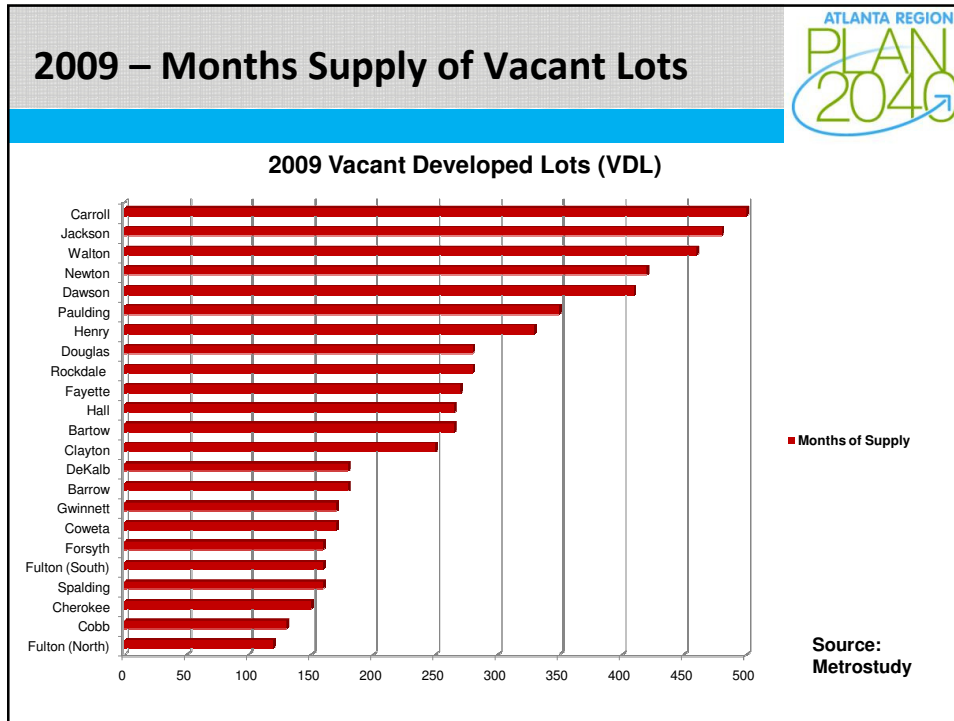
Foreclosures – The Latest




Source: Equity Depot

	Through August		Change	
	2008	2009	#	%
CHEROKEE	1,688	2,922	1,234	73.1%
CLAYTON	5,004	6,415	1,411	28.2%
COBB	5,276	8,151	2,875	54.5%
DEKALB	9,228	11,521	2,293	24.8%
DOUGLAS	1,846	2,642	796	43.1%
FAYETTE	869	1,193	324	37.3%
FULTON	12,665	15,976	3,311	26.1%
GWINNETT	8,542	14,839	6,297	73.7%
HENRY	3,143	4,543	1,400	44.5%
ROCKDALE	1,294	1,784	490	37.9%
10-co Total	49,555	69,986	20,431	41.2%





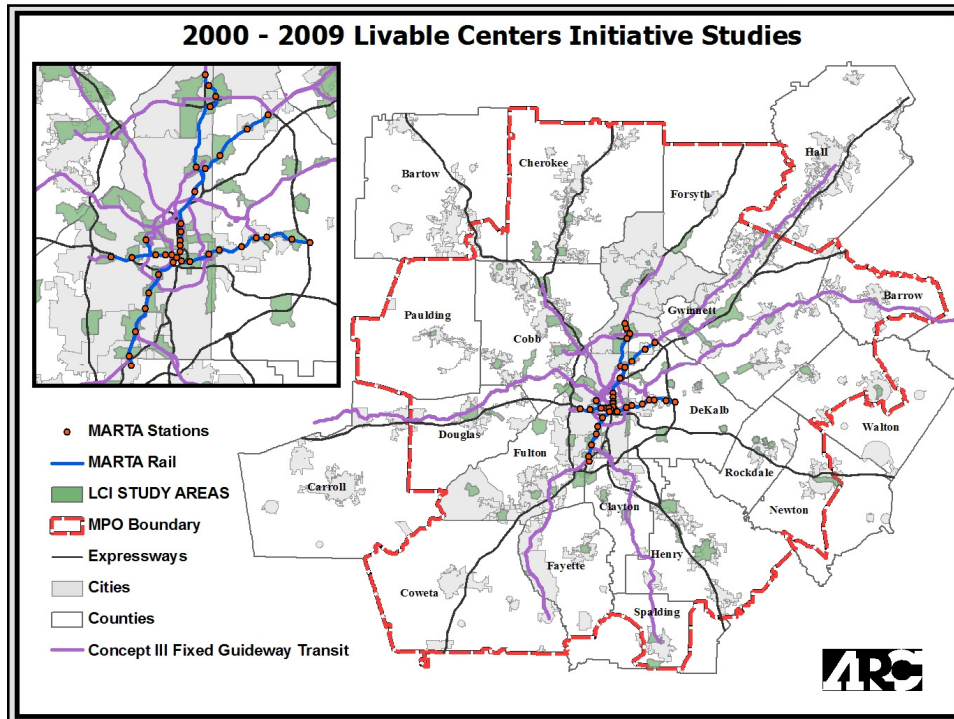


Success: - Livable Centers Initiative (LCI)




- LCI “flexes” federal transportation funds
- \$10 million over 10 years for studies
- \$500 million for transportation funding
- \$135 million programmed for 82 construction projects in 48 LCI communities
- 31 projects are under construction or have been constructed to date


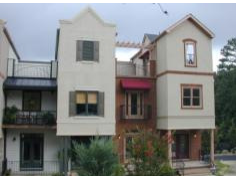



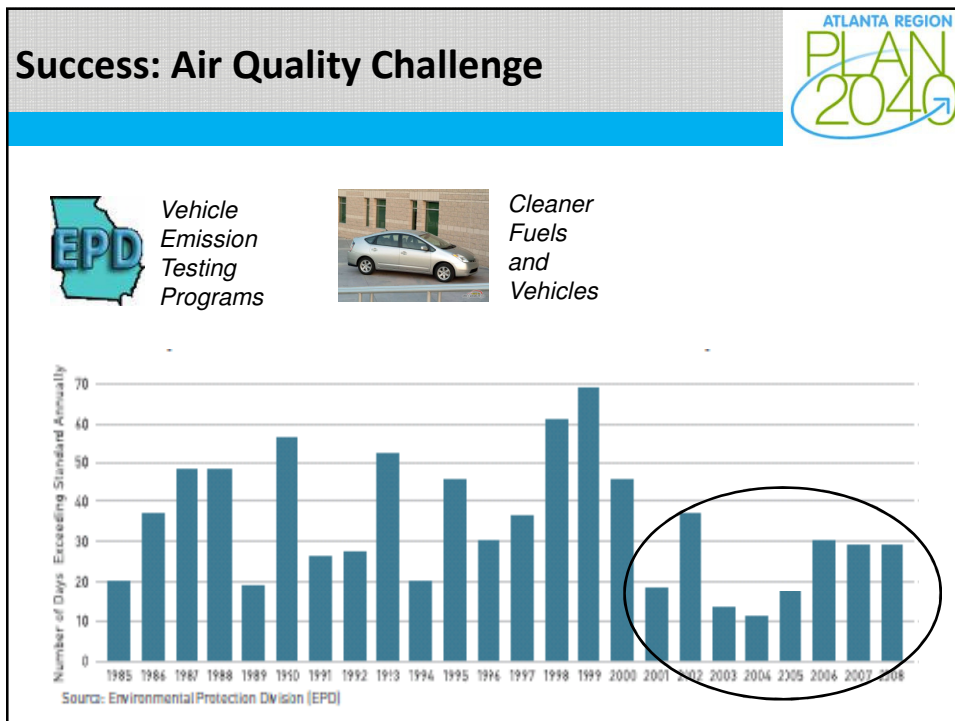
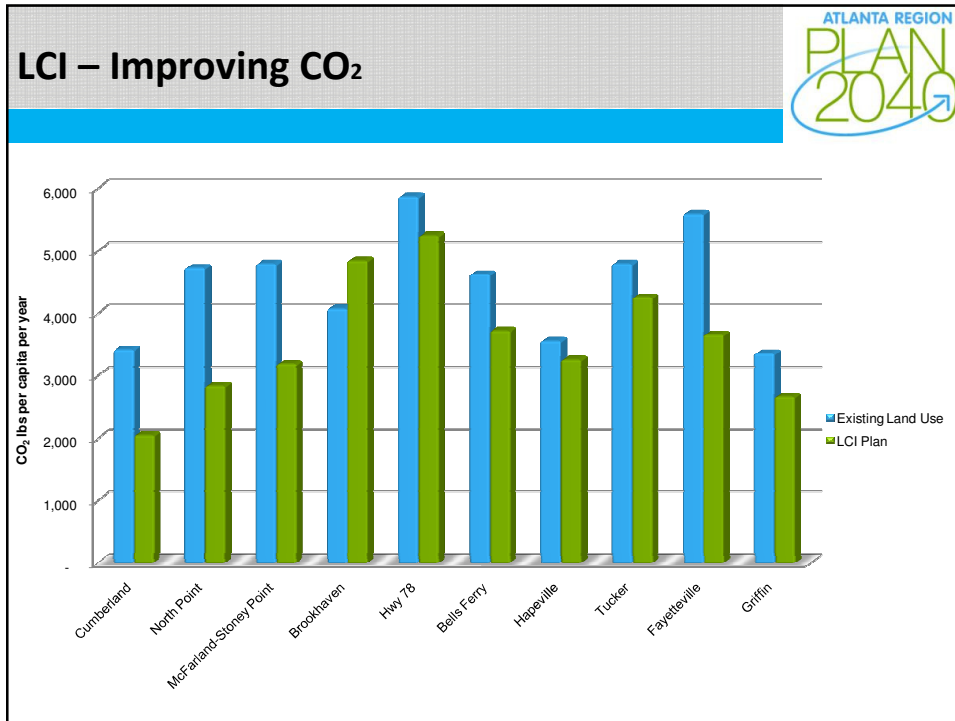


Livable Centers Initiative



- 85,000 residential units, 19 million square feet of commercial and 38 million square feet of office space
- Despite increase in population and employment within these centers, per capita VMT and emissions are reduced
- 92% of LCI communities have adopted their LCI Study into their comprehensive plan
- 66% have developed LCI zoning districts

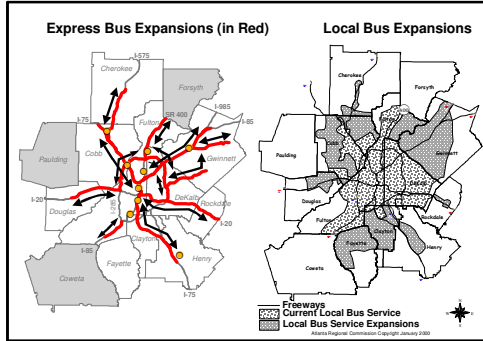





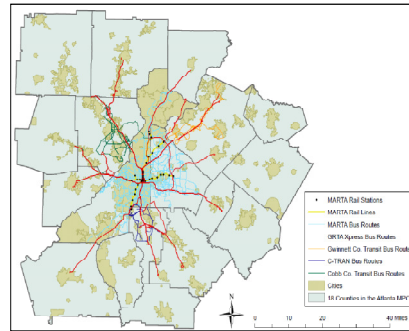
Success: Expanded Regional Transit



Proposed Transit Concept from 2000 RTP



Current Regional Transit Network

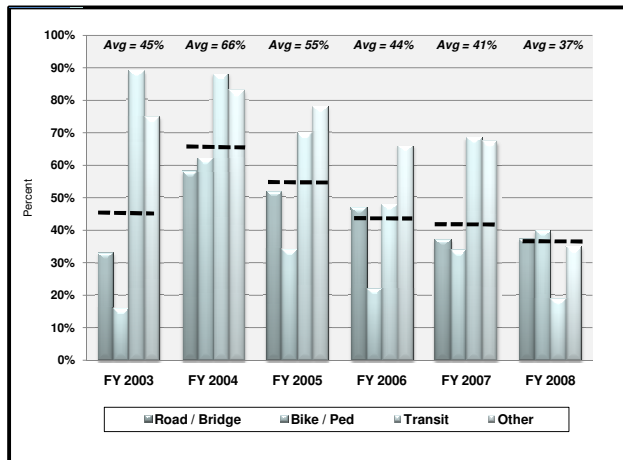


Most of 25 Year Bus Concept Implemented in Less Than One Decade! →
Since 2000, six of the region's twelve transit systems began operations

RTP Project Implementation Lags



Project Implementation Rates Below 50% Most of Decade



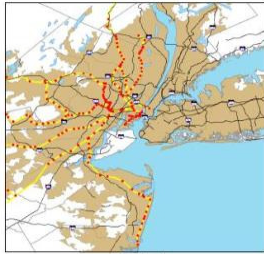
SR 316 / I-85
(constructed)



I-75/I-575 Managed Lanes
(not constructed)



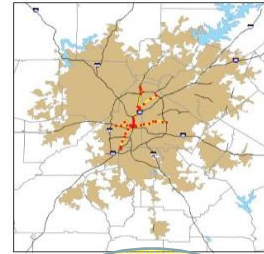
**Low Population Densities Characterizes the Atlanta Region
Comparison With Nation's Largest Regions...**



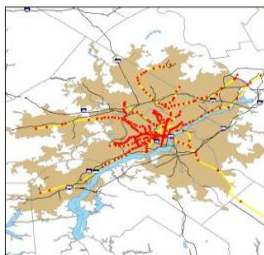
New York
Population 17,340,042
3,339 Square Miles



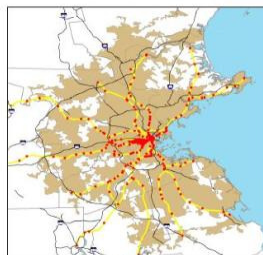
Chicago
Population 8,299,353
2,142.6 Square Miles



Atlanta
Population 3,493,117
1,978.2 Square Miles



Philadelphia
Population 5,142,385
1,806.8 Square Miles

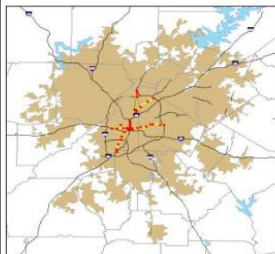


Boston
Population 4,014,865
1,766.5 Square Miles

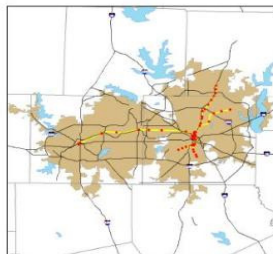


Los Angeles
Population 11,784,473
1,682 Square Miles

**Low Population Densities Characterizes the Atlanta Region
Comparison With Other Similarly Sized Regions...**



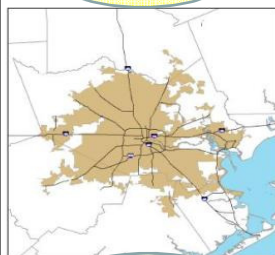
Atlanta
Population 3,493,117
1,978.2 Square Miles



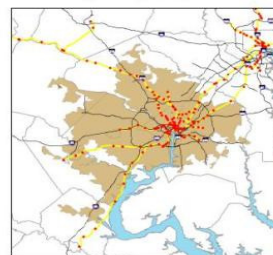
Dallas - Fort Worth
Population 4,140,851
1,414.9 Square Miles



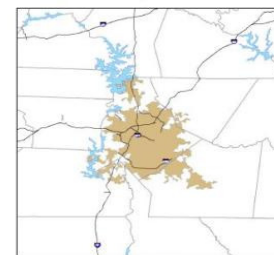
Phoenix
Population 2,904,968
800 Square Miles



Houston
Population 3,819,632
1,299.9 Square Miles



Washington D.C.
Population 3,936,201
1,184.3 Square Miles



Charlotte
Population 753,867
437.1 Square Miles

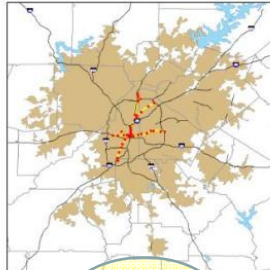
Development Patterns Working Against Congestion



Our Region's Low Densities Work Against Providing Congestion Relieving Transit Projects



Chicago
Population 8,299,353
2,142.6 Square Miles



Atlanta
Population 3,493,117
1978.2 Square Miles

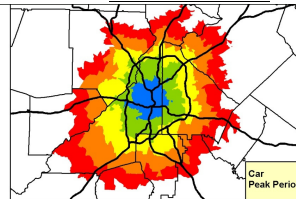
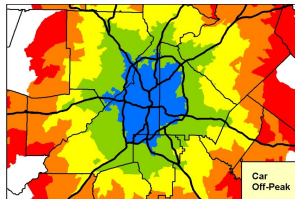
Atlanta has the lowest population density of any large region, making suburban, large-scale transit expansions uncompetitive for federal funding assistance

Chicago has over 2.3 times the Population in a Urbanized Region Nearly the Same Size As Atlanta!

Congestion Threatens Economic Competitiveness

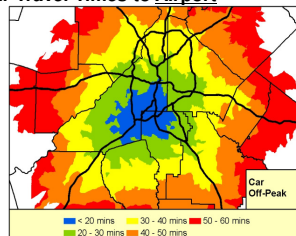
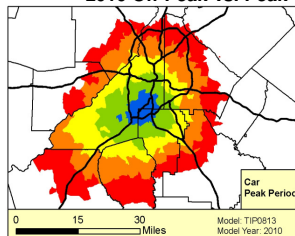


2010 Off-Peak vs. Peak Car Travel Times to Downtown Atlanta



Congestion Lowers the Number of People Who Can Access Downtown Atlanta in 40 minutes or less from 3 MILLION TO 1.3 MILLION

2010 Off-Peak vs. Peak Car Travel Times to Airport



Congestion Lowers the Number of People Who Can Access Airport in 40 minutes or less from 2.1 MILLION TO 860,000

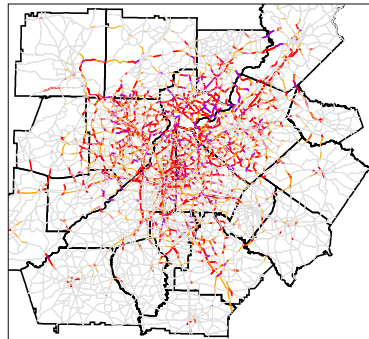
2010 Car Travel Times
 < 20 mins 30 - 40 mins 50 - 60 mins
 20 - 30 mins 40 - 50 mins

More Spaghetti on the Map?

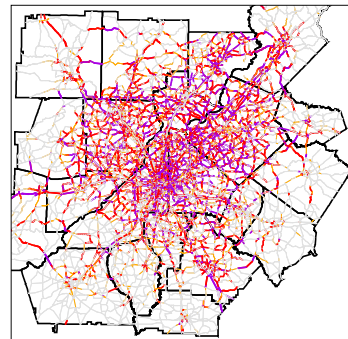


Limited Transit Options and Low Densities Lead to Heavy Automobile Use, Resulting in Congestion Levels Among the Nation's Worst

2010 Congestion



2040 Congestion



Roadway Level of Service

— A/B — C — D — E — F

Falling Behind on Transit Investments?



Dallas "Green Line" (2009-2010)
25 miles, \$1.3 billion





Denver (2007)
19 miles, \$880 million



Charlotte (2007)
9.6 miles, \$462 million

Not Just a Transportation Solution







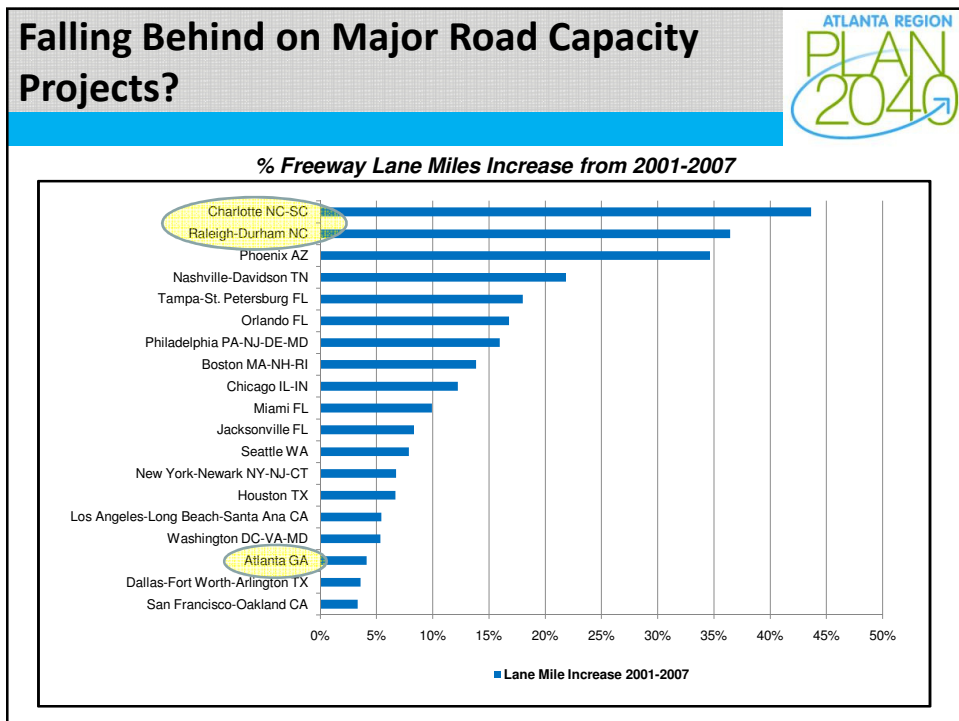
Dallas "Green Line" First Phase Completed September 2009, Rest in 2010
25 miles, \$1.3 billion

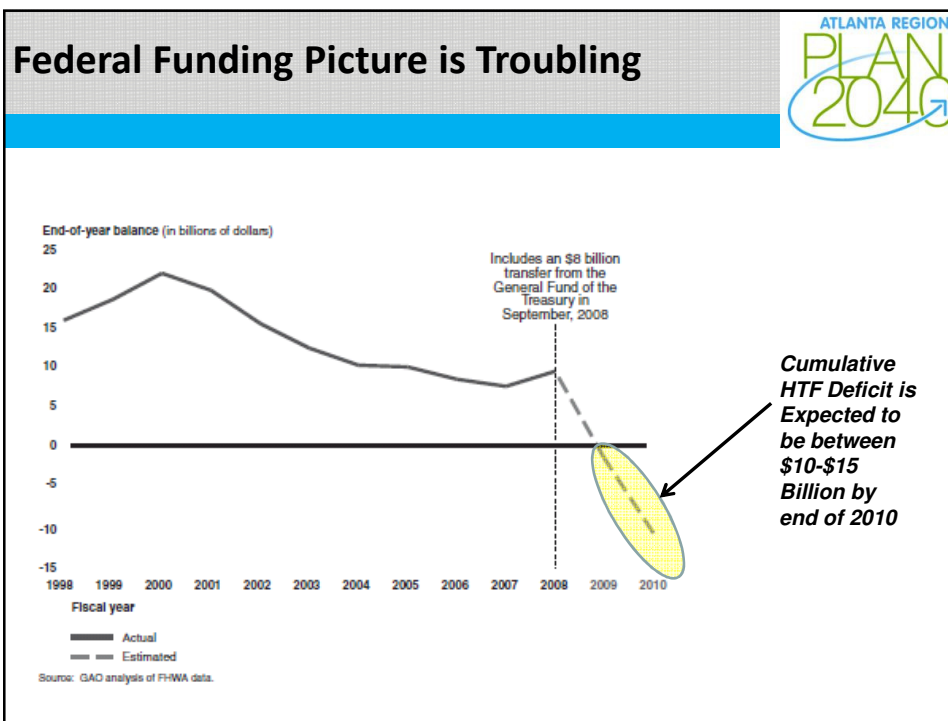
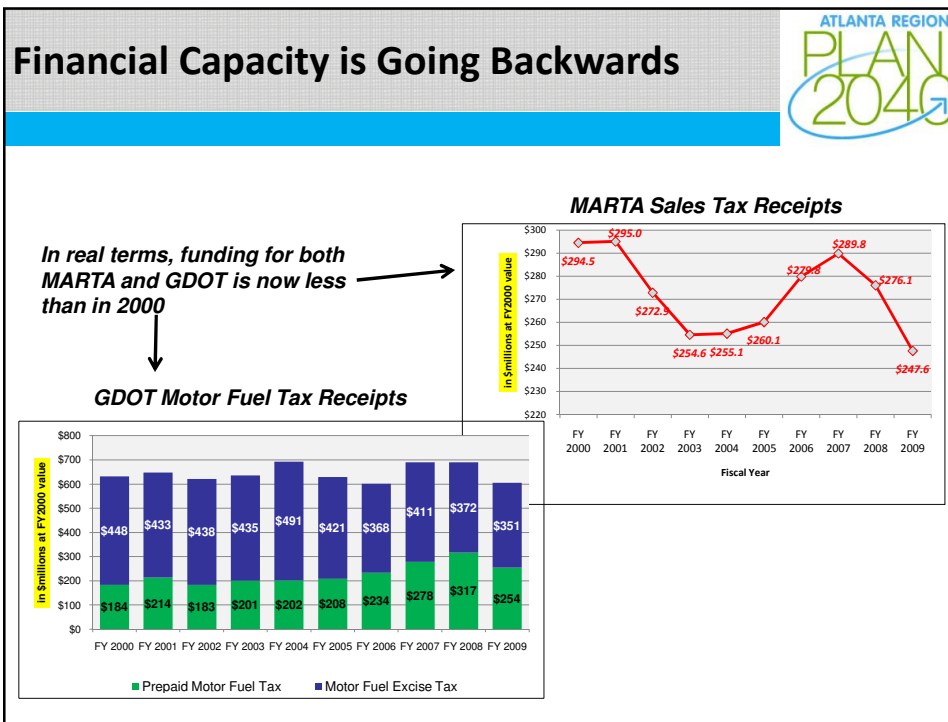
Opportunities to Develop Plans Around Transit Expansions

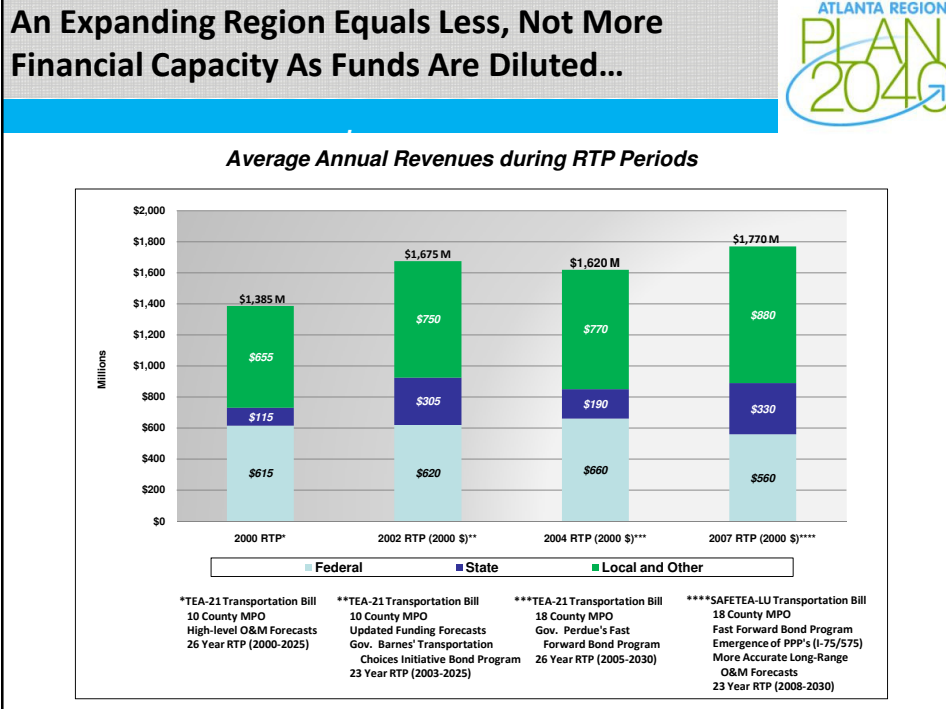
Downtown Carrollton, TX Segment Opening in 2010














Plan 2040 Mini-Retreat Supplemental Material

November 12th, 2009