

CITY OF SUWANEE GEORGIA



I-85 Business District: **Competitive Assessment & Development Strategy Report**



Bleakly Advisory
Group



September 2005

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STRATEGIC OVERVIEW OF THE I-85 BUSINESS DISTRICT ASSESSMENT AND STRATEGY

Over the past several decades Exit 111 on I-85, one of the key gateways into Suwanee, has undergone a major transition, from modest levels of commercial development, most of which was associated with the arrival of the Atlanta Falcons' headquarters and training facility and the first round of industrial development, to a major commercial business center catering to a mix of tourists and visitors, commercial enterprises and the retail needs of the rapidly expanding residential market.

At the same time Suwanee was growing rapidly, major growth was occurring throughout the I-85 corridor. Given all the changes, what is the City's vision for the future development of the I-85 District so that it will:

1. Continue to grow and prosper, making a major contribution to the city's tax base,
2. Deal effectively with the increasing traffic congestion, and
3. Provide an appealing gateway for visitors, residents and businesses into the City of Suwanee.

THE STUDY – The team of Bleakly Advisory Group, PBS&J and Key Advisors, Inc. was selected by the City of Suwanee to evaluate current conditions in the I-85 Business District and make recommendations about its future development. This study presents the views and opinions of the research team – these recommendations have not been adopted by the City of Suwanee as part of its development policies.

THE STUDY AREA – The I-85 Business District Study Area centers on Exit 111, the intersection of Lawrenceville-Suwanee Road (Hwy 317) and Interstate-85. It contains almost two miles of Hwy 317 and extends north to just beyond Satellite Boulevard, west to McGinnis Ferry Rd, and east to Collins Hill Road. The study area extends approximately 2.6 miles east-west and 1.65 miles north-south, for a total area of approximately 4.15 square miles.

DEMOGRAPHICS – The City of Suwanee is one of the fastest growing areas in Metro Atlanta. During the 1990s its population increased by more than 250% and has continued to grow rapidly since 2000. Residents of Suwanee tend to be slightly older and are more likely to be members of two- or three-person married households than residents of Gwinnett County. Compared to Gwinnett County as a whole, residents of Suwanee have achieved higher levels of educational attainment, with significantly more college graduates; more residents typically work in management and professional occupations and as a result, have median household incomes of \$91,615 which is 39% higher than the County's. Suwanee residents predominantly live in single-family owner occupied housing which has a median value of \$255,029, which is also significantly higher than the median value in the County.



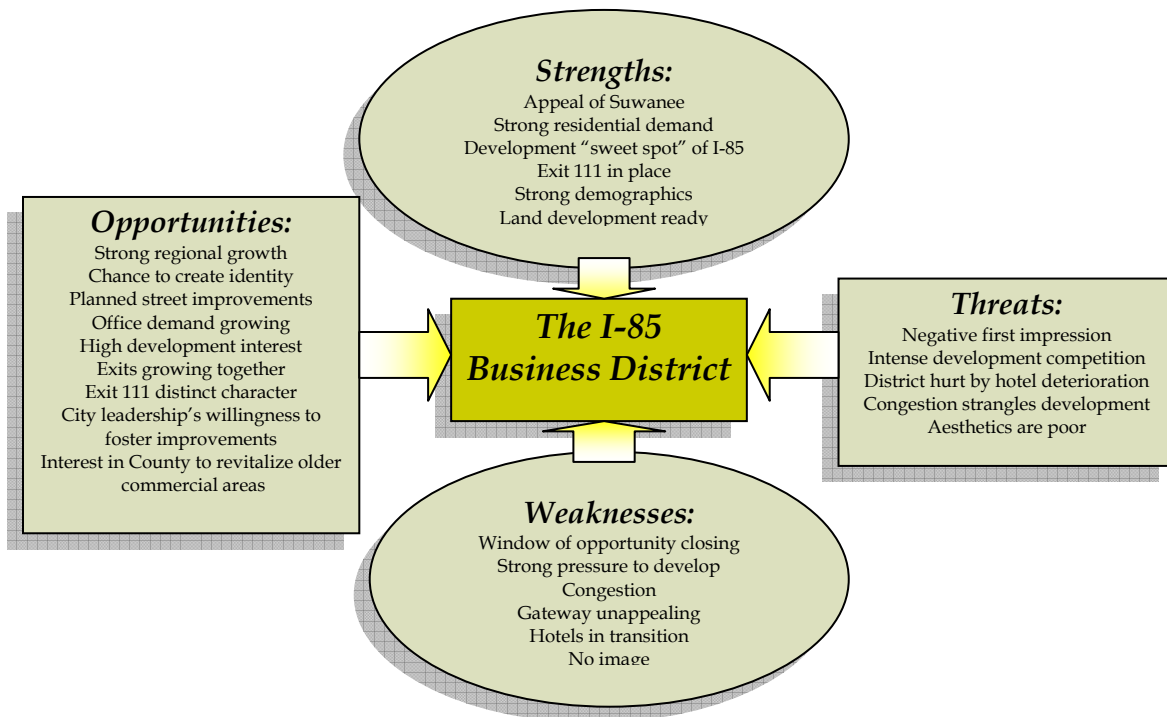
The residents of Suwanee have a very attractive demographic profile, which is appealing to retailers and businesses serving the residential market and provides an appealing labor market to businesses considering locating in the area. The positive demographics of Suwanee can play an important role in shaping the type of development which is attracted to the study area.

DEVELOPMENT OPPORTUNITIES – Seventeen sites representing over 800 acres were identified within the I-85 Business District as potential development opportunities due to such factors as their location, development potential, proximity to new or planned projects, and their ability to contribute to the character that the City desires for the I-85 District.

ECONOMIC IMPACTS FROM THE I-85 BUSINESS DISTRICT – The District is generating a significant level of economic impacts to the City of Suwanee and Gwinnett County:

- \$169 million in property assessed valuation
- 5,815 permanent jobs
- \$199 million in annual payroll
- \$130 million in retail sales
- \$34 million in spending for business operations
- \$558 million in general economic benefit
- \$9,252,169 in property and sales taxes

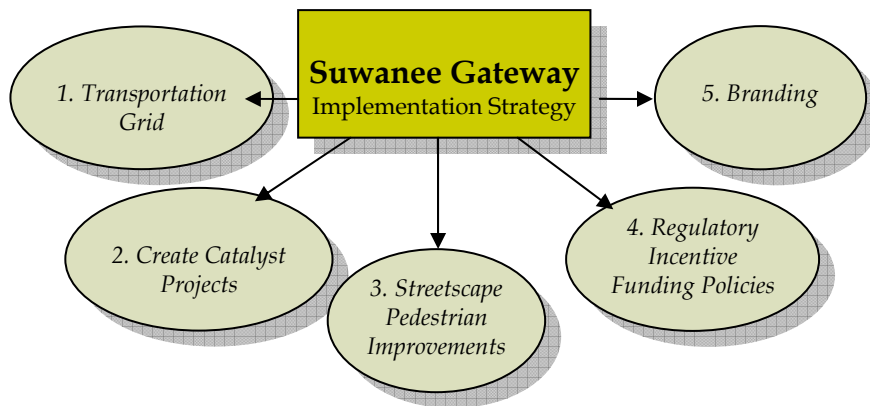
SUMMARY OF S.W.O.T. ANALYSIS OF I-85 BUSINESS DISTRICT –



A NEW VISION FOR THE I-85 BUSINESS DISTRICT – SUWANEE GATEWAY– The vision proposed for the I-85 Business District from the Research Team is to transform it over the next five years into **SUWANEE GATEWAY**. The concept behind Suwanee Gateway is to create a new identity for the I-85 Business District that is:

- **Greater than the sum of its constituent projects**– The idea of creating an overall theme and identity for the area is to “brand” the area with a distinct name and image that as the individual components of Suwanee Gateway* change and evolve over time, the brand will continue in the minds of residents, business and visitors.
- **Will endure and create value**– a strong identity built over time will create value for all in the area. For example, association with Midtown or Vinings is so valuable that projects located miles from the actual areas claim to be in these areas.
- **Consistent, linking a diverse area and mix of uses together**–the district is currently a very diverse mix of uses, separated by vacant and underutilized parcels and bisected by I-85. The Suwanee Gateway identity can provide a consistent theme between all of the currently unconnected uses in the district.

IMPLEMENTATION STRATEGY– The transformation of the current I-85 Business District into Suwanee Gateway can best be accomplished through the effective implementation of a **five part** strategy as outlined below:



The five key strategies are:

1. IMPROVE THE TRANSPORTATION GRID – Additional routes through and around the Suwanee Gateway area are necessary to mitigate traffic congestion, to reduce the existing dependence on the Lawrenceville-Suwanee Road interchange, to facilitate the movement of local and regional traffic, and to provide infrastructure improvements that can accommodate new development. This goal can be achieved by overlaying a new

* The term *Suwanee Gateway* is the theme recommended by The Research Team after considering many alternatives. The City of Suwanee might prefer another identity for the area, as appropriate, but the key objective is to create a strong new identity for the area.

transportation grid on the I-85 Business District. A grid system will provide alternative routes to allow east-west traffic to more easily maneuver through the area and north-south traffic to bypass the Interstate. The creation of the grid is the essential building block which supports other implementation strategies of the plan.

2. DEFINE AND CREATE CATALYST PROJECTS – Given the limited amount of public funding and staffing available for community development activities, the goal of this implementation strategy is to concentrate City resources on a short list of projects which can have a *catalytic impact* on achieving the overall vision for Suwanee Gateway. These projects should be thought of as essential “pump-priming” activities which will demonstrate the validity of the overall Suwanee Gateway concept. Three catalytic projects are:

- Creation of the Gateway Center mixed use project
- Development of Celebration Drive
- Upgrading and redevelopment of the Four Corners at Exit 111

Each is described below:

Gateway Center – The Gateway center would be a mixed-use suburban commercial district combining lifestyle retail, office, hotel, medical center and various residential uses into a signature project for Suwanee Gateway and for the City. Two parcels--the Motorola Site and the former Atlanta Falcons’ Headquarters-- are sufficiently large, and strategically located to Exit 111 to provide an opportunity to create a development of sufficient scale and complexity that it could influence the future development patterns in all of Suwanee Gateway. The goal of the project would be to create a new “anchor” project in the commercial hub of Suwanee, taking commercial development in the area to a new level of intensity consistent with other “Edge Cities” in the Atlanta region such as Perimeter Center, Concourse, Post Riverside, Old Ivy, etc.

Establish the Celebration Drive Hospitality District – To enhance the appeal of the Suwanee Gateway as a hospitality location, and to ultimately increase the number of visitors and residents who come to the area to enjoy the hotels, restaurants and other entertainment activities, make Gwinco Boulevard the hospitality district for Suwanee Gateway. This should begin by renaming Gwinco Boulevard as “Celebration Drive” and make it the focal point of the hospitality activities in Suwanee Gateway.

A Redevelopment Strategy for the Four Corners at Exit 111 – Residents and especially visitors to Exit 111 do not have a good first impression of the City of Suwanee when they exit from I-85. *Upgrading the interchange and the properties at the immediate four corners around it would have a catalytic impact on resident’s and visitor’s impressions of the area and would be one of the most meaningful ways to show real progress towards creation of the Suwanee Gateway.*



3. IMPLEMENT STREETScape AND PEDESTRIAN IMPROVEMENTS – District-wide streetscape improvements can achieve four main objectives:

1. create and reinforce a consistent image for the area,
2. make the area generally more appealing for local traffic and for visitors,
3. create visual impact in an otherwise cluttered commercial area; and,
4. conceal abrupt transitions in land uses.

The streetscape plan needs to cover the entire district, have major entrance features indicating your arrival in the district, and should have a special approach for Celebration Drive and the four corners area. The interchange bridge and surrounding uses should receive special attention.

4. REGULATORY, INCENTIVE AND FINANCING STRATEGIES – The vision for Suwanee Gateway will not be achieved by market forces acting alone but rather, will require the City of Suwanee to create a package of “carrots and sticks” in terms of regulatory policy, incentives and a funding plan for public infrastructure to provide a supporting framework to attract the private sector investment to make the vision a reality. This approach has been used with great success by Suwanee in the past, with the creation of its new downtown to cite one major example. We are proposing just such a strategy for Suwanee Gateway. As with Suwanee’s new downtown, three essential elements of the support framework need to be put in place for Suwanee Gateway:

Regulatory:

- *Future Land Use Plan* – The City has created a future land use plan for the area that generally will permit the types of development planned for Suwanee Gateway over the next decade. Additional refinement of the Land Use plan may be appropriate once the specific plans for Gateway Center and Suwanee Gateway area have been determined.
- *Mixed-use Zoning* – the City has established a mixed use zoning policy which covers the Motorola/Falcons site. The plan should be modified to incorporate changes to assure key elements of the conceptual plan are implemented regarding interparcel access, parkways and open space, and circulation.
- *Overlay District for streetscapes and pedestrian zones*, including special conditions for the four corners and Celebration Drive areas.
- *Adopt a “Quality Assurance Initiative”* – The City has to be vigilant in using its code enforcement, public safety and fire safety as important “stick” strategies to promote the upkeep of the older properties in the district which are showing signs of disinvestment. This is particularly critical in the hospitality sector where a number of older properties are negatively impacting the image of the sector due to increasing crime, deferred maintenance and other issues. Providing a high level of public property maintenance in terms of street sweeping, right-of-way maintenance, etc., is an important component of this policy.

- *Regulation of Signs*—the area reflects its initial development pattern of highway-oriented commercial retail. More and more signs are erected as more and more retail and lodging locations are developed. *Limiting future signs, lessening the number of new poles by allowing multiple signs on individual poles and using some of the existing billboards to do group advertising of Suwanee Gateway could all serve as effective strategies for rationalizing the current jumble of signs at the interchange.*
- *Regulating hotel quality*—An evaluation of the hotels with the highest incidence of crime in Suwanee indicates that they are the older properties with exterior corridors and they are the properties which are allowing extended stay guests. A potential regulatory remedy would be to prohibit any new hotels with exterior corridors and to disallow extended stay usage except in pre-designated hotel zones or in properties constructed specifically for this market segment. Strategies supporting the development of new hotels, while encouraging the “pruning” of older, outmoded properties through reuse and redevelopment should be encouraged.

Financing:

- ***Create a TAD for Gateway Center***—The creation of a Tax Allocation District or TAD can provide a powerful financial incentive for the development of a major project. We believe a TAD would be a valuable incentive in the implementation of Gateway Center to create the level of public improvements consistent with the vision for this area as a step above current development patterns in the area. The judicious use of TAD to support creation of public open space and pedestrian improvements linking land uses on the site, and to create shared parking facilities could help achieve a development vision for the property beyond what current market forces can economically justify. The TAD can make the early investment on these public benefits work financially and allow the development to lead the market in terms of the quality and connectivity of the project and its uses. For example, parking decks were critical to the success of Post Riverside. TAD could support their creation at Gateway Center. The TAD could also be used to defray the substantial cost of creating a new internal roadway connecting Lawrenceville-Suwanee Road to McGinnis Ferry Road and structure parking decks which would allow for the more intensive development of the site. This incentive could permit the type of mixed use development envisioned for the site to lead the market and make it financially feasible to develop the type of mixed use commercial core that would take development to a new level in the this portion of the City.
- ***Creation of a Community Improvement District to fund Infrastructure***—The ambitious streetscape, pedestrian and intersection improvements needed to create Suwanee Gateway will be costly if done in sufficient scale and of the quality necessary to set the right tone for development in the area. While some other sources of funding will be available, it is likely that another major local funding source will be required. Several other “Edge Cities” in our region, notably Cumberland and Perimeter Centers, have successfully used Community

Improvement Districts (“CID”) to fund substantial infrastructure and streetscape improvements. A CID could be established for the Suwanee Gateway which would be designed to provide funding support for the needed infrastructure, streetscapes and pedestrian improvements in the area.

- **LCI Funding** – The city should seek funding for the transportation improvements and streetscape associated with Suwanee Gateway from the Livable Centers Initiative (LCI) program administered by the Atlanta Regional Commission. Suwanee has already participated in the program for its new downtown. We believe that Suwanee Gateway is a logical project for future LCI funding. A supplemental package addressing the remaining program requirements should be completed and submitted, along with this study, to the Atlanta Regional Commission for future funding of portions of the Suwanee Gateway by the LCI program. Matched with funds from the CID, the LCI could be a major contributor to covering the cost of the proposed infrastructure improvements.

5. BRANDING – The Suwanee I-85 Business District does not have a distinct and consistent image in the minds of residents and visitors. To create that consistent image, and one which can bridge the wide range of land uses and activities, we have proposed creating Suwanee Gateway as the “brand” for the area. By creating the brand identity of Suwanee Gateway we will be enhancing the awareness of the area to residents and visitors to the area and put the area on a more level playing field with the interchanges at the Mall of Georgia and the Gwinnett Civic Center which have clearly established identities.

RESULTS FROM IMPLEMENTING THE SUWANEE GATEWAY CONCEPT – Ten years from now what would be the results of this effort for the City?

- Visitors and residents would know that when they arrive Exit 111 they are in the heart of an exciting commercial “Edge City” – Suwanee Gateway.
- The area would have a distinct feel and look from the special lighting and landscaping that will link the area together to the commercial development.
- The Gateway Center will be the commercial heart of Suwanee Gateway, and will be a true live, work, shop destination for those who work and live there, as well as other city residents and visitors to Suwanee. Gateway Center will be a visible symbol of Suwanee’s growth as a major commercial center on the I-85 Interstate corridor – distinctive from the areas around the Gwinnett Civic Center and Mall of Georgia interchanges. The Center will be a major employment center for Suwanee, providing the largest concentration of jobs in the city.
- Celebration Drive will emerge as a compelling concentration of hotels restaurants, entertainment and retailing that will appeal to visitors and residents.
- The transportation grid will provide the traffic capacity to allow the new development to occur, giving Suwanee residents and businesses alternative ways to travel through this increasingly congested area. It will also link the area to the development occurring at The Gwinnett Civic Center and Mall of Georgia.

- The investment in Gateway Center will stimulate a new wave of development in Suwanee Gateway, as property owners upgrade the existing retail and commercial developments, expanding the tax base and employment opportunities in the city.
- Suwanee Gateway will become a destination for visitors and a location known throughout the Atlanta region, with a full complement of lodging facilities, places to eat, shop and be entertained in a lively, vibrant mixed-use district that will be a place visitors and residents enjoy sharing with the region.



Concept for Exit 111 Interchange as the icon of Suwanee Gateway

Introduction

The City of Suwanee is one of the fastest growing municipalities in the Atlanta region. It has grown dramatically from a small, largely rural community on the fringe of the Atlanta region in the 1970's to being a centerpiece of the rapidly expanding residential and commercial growth corridor along Interstate 85. Over the past several decades Exit 111 on I-85, one of the key gateways into Suwanee, has undergone a major transition, from modest levels of commercial development, most of which was associated with the arrival of the Falcons' headquarters and the first round of industrial development, to a major commercial business center catering to a mix of tourists and visitors, commercial enterprises and the retail needs of the rapidly expanding residential market.

At the same time Suwanee was growing rapidly, major growth was occurring throughout the I-85 corridor, with the development of Discover Mills, Sugarloaf, and the Gwinnett Civic Center complex to the south and the Mall of Georgia and related developments to the north. Given all the changes that are occurring in the area, the City of Suwanee is interested in understanding the future of the I-85 business district. Specifically, what should be the City's vision for the future development of the area so that it will:

1. Continue to grow and prosper, making a major contribution to the city's tax base,
2. Deal effectively with the increasing traffic congestion, and
3. Provide an appealing gateway for visitors, residents and businesses into the City of Suwanee.

Bleakly Advisory Group, PBS&J and Key Advisors (the BAG team) were chosen through a competitive procurement by the City of Suwanee to address these issues through implementation of a two part research process: Part I involves a competitive assessment of current conditions in the I-85 business district. Part II presents an economic development strategy for the district.

Our research team is highly experienced in development planning and implementation.

Bleakly Advisory Group is a real estate market and financial advisory firm which has assisted clients throughout the Southeast develop mixed-use project and redevelopment strategies. Ken Bleakly directed a non-profit development firm responsible for over \$600 million in urban redevelopment.

PBS&J is one of the Southeast's premier civil engineering and land planning firms. PBS&J has been responsible for major land planning and transportation planning projects throughout the Atlanta region and has over 5,000 employees world wide.

Key Advisors is a highly experienced hospitality consulting firm headed by Linda Wilson. Key Advisors applied its considerable expertise in analyzing the hospitality and tourist capacities of the I-85 Business District.

The recommendations of the research team present a vision and specific action plans for implementation of the vision and represents the culmination of an extensive analysis of the area. The recommendations have not been adopted as development policies by the City of Suwanee, though we urge the City to do so.



PART I: COMPETITIVE ASSESSMENT

Part I of this report represents the culmination of the initial phase of the team's research. This assessment is based on two months of research including the following:

- Interviews with 25 stake holders in the area, including business managers, property owners and real estate professionals
- Interviews with key members of the hospitality sector
- A review of area demographics
- An analysis of real estate trends in the study area and Gwinnett County
- A review of current transportation, zoning and land use policies

The purpose of this report is to provide a current assessment of the competitive position of the district to provide a foundation for making recommendations for its future development that are grounded in current and near-term market realities. This report:

- defines the boundaries of the I-85 business district,
- details its key demographic and economic characteristics,
- describes major real estate trends impacting the area,
- identifies properties within the district with strong development potential,
- assesses the competitive position of the district,
- evaluates the impact of current land use and zoning policies on its development,
- estimates the economic impact of the district to the city, and
- analyzes the strengths and weaknesses of the district and the opportunities and threats it faces in its future development.

The following section summarizes our research on all of these issues. The recommended strategies for the future development of the business district are presented in Part II of this report.



Definition of Study Area

The I-85 Business District Study Area centers on Exit 111, the intersection of Lawrenceville-Suwanee Road (Hwy 317) and Interstate 85. It contains almost two miles of Hwy 317 and extends north to just beyond Satellite Boulevard, west to McGinnis Ferry Road, and east toward Collins Hill Road. The study area extends approximately 2.6 miles east-west and 1.65 miles north-south, for a total area of approximately 4.15 square miles. The majority of the area is located within the city limits of Suwanee and the entire study area is contained in Gwinnett County. This study area was chosen to define the portion of Suwanee which has developed as the commercial core around Exit 111 and to include the larger, undeveloped properties with development potential nearest the interchange. Areas which are predominately residential were excluded from the study area to the degree practical.

(See Map 1: Context and Map 2: Study Area)



Key Development Trends

DEMOGRAPHICS

The following section outlines major demographic trends within the City of Suwanee and Gwinnett County which will impact the study area. The future development potential of the study area will be directly affected by the character of the community where it is located. Analysis of the demographics of the City of Suwanee provides a context for understanding the real estate development trends presented in the remainder of this section. Exhibit 1 summarizes the key demographic characteristics of Suwanee and contrasts them with Gwinnett County as a whole. *

Population and Growth

Suwanee underwent a period of rapid growth during the 1990s, increasing from 2,488 residents to 8,725 – a growth rate over the period of 250.7%. During the same period, Gwinnett grew from 352,910 to 588,448 residents or 66.7%. Suwanee, which represented 0.7% of Gwinnett County’s total population in 1990, grew to 1.5% by 2000. During the past four years Suwanee grew by an additional 36.8%, increasing to 11,934 residents. During the next five years the city is expected to grow to 15,743 residents, an increase of 31.9% over the period. Thus, the City of Suwanee will continue to experience strong growth over next five years which will result in a population more than 6 times larger than it was in 1990.

Racial Composition

Based on data from 2004, over 81.1% of the population of the City of Suwanee is white, with 6.6% African-American and 9.1% Asian. This is slightly less diverse than the County (66.8%, 15.3%, and 8.7%, respectively). In addition, 4% of Suwanee’s population identifies themselves as Hispanic or Latino, compared to 15% in the County.

Age

Somewhat surprising given its rapid growth, the population of the City tends to be slightly older than for the County as a whole. The median age in Suwanee is 35 years versus 32.9 for the County. Persons aged 24 or younger represent 35% of the City’s population versus 36.6% of the County’s. Yet, persons 65 and older represent 5.2% of the City’s population versus 6.0% percent of the County’s. The City has a slightly higher percentage (37.3%) of persons in the key family age cohort -25 to 44 years- versus 35.7% for the County as a whole.

* The data for this section was provided by Claritas, Inc., nationally known data providers and is based on the 2000 U.S. Census. Data is presented for the legal boundaries of the City of Suwanee and Gwinnett County.

Educational Attainment

The residents of Suwanee have higher levels of educational attainment than residents of Gwinnett County generally. One third (33%) of the City's residents over the age of 25 have a college degree versus 24.1% in the County. In addition, 12.3% of Suwanee's residents have advanced degrees versus 10% of the County's residents.

Occupation

Probably due to their higher educational attainment, City of Suwanee residents have a higher proportion of "white collar" residents engaged in management and professional occupations. In the City, 50.6% work in management, business, and financial operations or professional and related occupations, which compares to 39.7% in the County. The study area has a lower proportion of residents in traditionally "blue collar" occupations of construction, extraction, maintenance or production, transportation, and material moving at 13.3% compared to the County's 19.7%.

Households

Growth in the number of households parallels the trends in population growth noted above, with the number of Suwanee households growing at a rapid pace. The number of households in the City increased from 795 to 2,947 over the decade of the 1990s. Since 2000 the number of households increased to 3,970 by 2004, a 34.7% increase. By comparison, households expanded by only 16.4% in Gwinnett County over the same period. During the next five years household growth is expected to increase by 29.5% in the City reaching 5,140 households by 2009.

Household Size and Type

The average household size in the City and County are identical at 2.9 persons. In the City 54.9% of the households are composed of two or three persons versus 49.4% in the County. Claritas reports that 71.3% of the households in the City are married couples, versus 60.9% in the County. Single person households account for only 14.2% of households in the City but are 18.2% of households in the County. Thus, Suwanee can be characterized as a family-oriented suburban community.

Household Income

In 2004, the City of Suwanee had a median household income of \$91,615 per year, which is 39% higher than the median income of \$65,805 for Gwinnett County. Among Suwanee's households in 2004, 43.9% earned more than \$100,000 per year versus 24.1% in Gwinnett County, thus, Suwanee's households have significantly higher incomes than households in Gwinnett generally.

Housing Tenure

In 2004, over 77% of Suwanee residents owned their homes, versus 72.6% in the County.



Housing

Housing Structure

The vast majority of Suwanee residents live in single family housing (76.4%) which is an even higher percentage than in Gwinnett County (71.8%). Smaller apartment projects with 3 to 19 units account for the most common multi-family housing type in the City, which is consistent with trends in the County.

Housing Age

In the City of Suwanee, 72.2% of the housing stock has been constructed since 1995. Gwinnett County has an older housing stock, with only 36.6% of it's housing built since 1995.

Housing Values

The median house value in Suwanee in 2004 was \$255,029 which is 46% higher than the median value of \$174,382 in the County. The largest proportion of homes in Suwanee are valued between \$200,000 and \$299,000. Within Gwinnett County the dominant house values range more broadly between \$100,000 and \$299,000.

Summary

The City of Suwanee is one of the fastest growing areas in Gwinnett County. During the 1990s its population increased by more than 250% and has continued to grow rapidly since 2000. Residents of Suwanee tend to be slightly older and are more likely to be members of two- or three-person married households than residents of Gwinnett County. Residents of Suwanee have achieved higher levels of educational attainment, with significantly more college graduates; they more typically work in management and professional occupations and as a result, have median household incomes of \$91,615 which is 39% higher than the County's. They live in single-family owner occupied housing which has a median value of \$255,029, which is also significantly higher than the median value in the County.

Thus, the residents of Suwanee have a very attractive demographic profile, which is appealing to retailers and businesses serving the residential market and provides an appealing labor market to businesses considering locating in the area. The positive demographics of Suwanee can play an important role in shaping the type of development which is attracted to the study area.

Exhibit 1: Demographic Characteristics

	City of Suwanee		Gwinnett County	
	Number	%	Number	%
Population				
2009 Projection	15,743		817,629	
2004 Estimate	11,934		691,231	
2000 Census	8,725		588,448	
1990 Census	2,488		352,910	
Growth 2004 - 2009	31.9%		18.3%	
<i>Compound Annual Growth</i>	5.7%		3.4%	
Growth 2000 - 2004	36.8%		17.5%	
<i>Compound Annual Growth</i>	8.1%		4.1%	
Growth 1990 - 2000	250.7%		66.7%	
<i>Compound Annual Growth</i>	13.4%		5.2%	
2004 Racial Composition				
White Alone	9,679	81.1	461,756	66.8
Black or African American Alone	789	6.6	105,765	15.3
Asian Alone	1,085	9.1	60,203	8.7
Other	381	3.2	63,507	9.2
<i>Total</i>	11,934		691,231	
2004 Population by Age				
Under 17	3,422	28.7	192,417	27.8
Age 18 - 24	751	6.3	60,615	8.8
Age 25 - 34	1,788	15.0	116,617	16.9
Age 35 - 44	2,656	22.3	129,839	18.8
Age 45 - 54	1,805	15.1	97,773	14.2
Age 55 - 64	904	7.6	52,269	7.6
Age 65 - 74	355	3.0	24,993	3.6
Age 75 - 84	199	1.7	12,550	1.8
Age 85 and over	54	0.5	4,158	.6
<i>Total</i>	11,934		691,231	
2004 Est. Median Age				
	35.0		32.9	
2000 Population Age 25+ by Educational Attainment				
Less than High School	407	7.1	47,372	12.7
High School Graduate (or GED)	935	16.3	81,979	22.0
Some College or Associates Degree	1,784	31.1	116,370	31.2
Bachelor's Degree	1,912	33.3	89,735	24.1
Post-Graduate	706	12.3	37,172	10.0
<i>Total</i>	5,744		372,628	
2000 Civilian Employed Pop. Age 16+ by Occupation				
Management, Business and Financial Operations	1,359	28.3	59,773	19.0
Professional and Related Occupations	1,070	22.3	65,169	20.7
Service	407	8.5	32,788	10.4
Sales and Office	1,332	27.7	94,639	30.1
Farming, Fishing and Forestry		0.0	302	0.1
Construction, Extraction, and Maintenance	297	6.2	31,725	10.1
Production, Transportation, and Material Moving	343	7.1	30,075	9.6
<i>Total</i>	4,808		314,471	

Source: Claritas



Exhibit 1 (cntd.): Demographic Characteristics

	City of Suwanee		Gwinnett County	
	Number	%	Number	%
Households				
2009 Projection	5,140		275,729	
2004 Estimate	3,970		235,575	
2000 Census	2,947		202,317	
1990 Census	795		126,971	
Growth 2004 - 2009	29.5%		17.1%	
<i>Compound Annual Growth</i>	5.3%		3.2%	
Growth 2000 - 2004	34.7%		16.4%	
<i>Compound Annual Growth</i>	7.7%		3.9%	
Growth 1990 - 2000	270.7%		59.3%	
<i>Compound Annual Growth</i>	14.0%		4.8%	
2004 Households by Household Size				
1-person household	564	14.2	42,875	18.2
2-person household	1,227	30.9	69,986	29.7
3-person household	828	20.9	46,513	19.7
4-person household	838	21.1	44,278	18.8
5+ person household	513	12.9	31,923	13.6
<i>Total</i>	3,970		235,575	
2004 Average Household Size	2.94		2.90	
Households Type				
Married-Couple Family	2,831	71.3	143,414	60.9
Other Family, Male Householder	110	2.8	9,487	4.0
Other Family, Female Householder	231	5.8	23,267	9.9
Nonfamily, Male Householder	454	11.4	29,778	12.6
Nonfamily, Female Householder	344	8.7	29,629	12.6
<i>Total</i>	3,970		235,575	
2004 Households by Household Income				
Income Less than \$15,000	130	3.3	13,085	5.6
Income \$15,000 - \$24,999	81	2.0	14,174	6.0
Income \$25,000 - \$34,999	146	3.7	21,153	9.0
Income \$35,000 - \$49,999	442	11.1	35,139	14.9
Income \$50,000 - \$74,999	702	17.7	54,154	23.0
Income \$75,000 - \$99,999	728	18.3	41,091	17.4
Income \$100,000 - \$149,999	927	23.4	36,729	15.6
Income \$150,000 - \$249,999	767	19.3	15,780	6.7
Income \$250,000 - \$499,999	44	1.1	3,323	1.4
Income \$500,000 or more	3	0.1	947	0.4
<i>Total</i>	3,970		235,575	
2004 Average Household Income	\$103,821		\$79,265	
2004 Median Household Income	\$91,615		\$65,805	
2004 Per Capita Income	\$35,153		\$27,265	
2004 Tenure of Occupied Housing Units				
Owner Occupied	3,084	77.7	170,942	72.6
Renter Occupied	886	22.3	64,633	27.4
<i>Total</i>	3,970		235,575	

Source: Claritas



Exhibit 1 (cntd.): Demographic Characteristics

	City of Suwanee		Gwinnett County	
	Number	%	Number	%
2004 Owner-Occupied Housing Values				
Value Less than \$20,000		0.0	2,174	1.3
Value \$20,000 - \$39,999		0.0	1,414	0.8
Value \$40,000 - \$59,999	23	0.8	884	0.5
Value \$60,000 - \$79,999	12	0.4	1,779	1.0
Value \$80,000 - \$99,999	11	0.4	4,794	2.8
Value \$100,000 - \$149,999	338	11.0	47,848	28.0
Value \$150,000 - \$199,999	387	12.6	54,503	31.9
Value \$200,000 - \$299,999	1,401	45.4	39,646	23.2
Value \$300,000 - \$399,999	713	23.1	10,922	6.4
Value \$400,000 - \$499,999	145	4.7	4,134	2.4
Value \$500,000 - \$749,999	41	1.3	1,581	0.9
Value \$750,000 - \$999,999	13	0.4	731	0.4
Value \$1,000,000 or more		0.0	532	0.3
<i>Total</i>	3,084		170,942	
2004 Housing Units by Units in Structure				
1 Unit Attached	25	0.6	8,642	3.5
1 Unit Detached	3,231	76.4	175,230	71.8
2 Units	1	0.0	4,632	1.9
3 to 19 Units	775	18.3	39,462	16.2
20 to More Units	194	4.6	10,319	4.2
Mobile Home or Trailer		0.0	5,723	2.3
Boat, RV, Van, etc.	1	0.0	121	0.1
<i>Total</i>	4,227		244,129	
2004 Housing Units by Year Structure Built				
Housing Unit Built 1999 to present	1,508	35.7	47,322	19.4
Housing Unit Built 1995 to 1998	1,544	36.5	41,347	16.9
Housing Unit Built 1990 to 1994	480	11.4	35,123	14.4
Housing Unit Built 1980 to 1989	480	11.4	70,793	29.0
Housing Unit Built 1970 to 1979	82	1.9	33,014	13.5
Housing Unit Built 1960 to 1969	25	0.6	9,953	4.1
Housing Unit Built 1950 to 1959	31	0.7	3,716	1.5
Housing Unit Built 1940 to 1949	11	0.3	1,214	0.5
Housing Unit Built 1939 or Earlier	66	1.6	1,647	0.7
<i>Total</i>	4,227		244,129	
2004 Median Year Structure Built	1997		1990	
2004 Workers Age 16+ by Travel Time to Work				
Less than 15 Minutes	1,262	20.8	61,110	17.3
15 - 29 Minutes	1,490	24.6	103,370	29.3
30 - 44 Minutes	1,597	26.4	92,930	26.4
45 - 59 Minutes	1,076	17.8	49,541	14.1
60 or more Minutes	631	10.4	45,619	12.9
<i>Total</i>	6,056		352,570	
2004 Average Travel Time to Work in Minutes	33.89		34.98	

Source: Claritas



DEVELOPMENT PATTERNS

The Industrial Market

While Gwinnett County has traditionally been a popular location for industrial development, especially along transportation corridors such as I-85, the study area has a particularly high concentration of industrial facilities. The study area is part of the Northeast I-85 Corridor Submarket as defined by Dorey Market Analysis Group who have tracked the Atlanta real estate market for over 25 years. This submarket is generally defined as Gwinnett County from southeast of GA 400 to Hwy 29, bisected by I-85. With 68 million square feet of space it is the largest industrial submarket in the Atlanta regional industrial market of 206 million square feet of space. As with the Atlanta regional market, the Northeast I-85 Corridor submarket is experiencing a period of significant vacancy with 21.0 million square feet of space available, or 30.8%.

Within 1.5 miles of Exit 111, there are 41 industrial buildings most of which are located within 10 projects, including 6 parks. There is 5,506,674 square feet of industrial space in the study area which represents 8.8% of the entire Northeastern submarket.

Exhibit 2: Regional and Study Area Industrial Inventory

	Total	Available	% Available	Lease Rates	Under Construction
<i>Northeast I-85 Corridor</i>					
Distribution	28,921,894	8,437,744	29.2%	\$4.69-\$5.07	421,191
Service	16,374,511	5,803,068	35.4%	\$6.93-\$7.73	189,900
Warehouse	22,887,471	6,787,280	29.7%	\$2.60-\$3.39	769,600
<i>Summary</i>	<i>68,183,876</i>	<i>21,028,092</i>	<i>30.8%</i>	<i>\$2.60-\$7.73</i>	<i>1,380,691</i>
<i>Study Area (Exit 111)</i>					
Distribution	1,945,601	423,255	21.8%	\$2.95-\$6.50	0
Service	541,600	-	-	\$3.00-\$7.00	0
Warehouse	3,019,473	730,344	24.2%	\$2.75-\$7.00	489,200
<i>Summary</i>	<i>5,506,674</i>	<i>1,153,599</i>	<i>-</i>	<i>\$2.75-\$7.00</i>	<i>489,200</i>

Source: Dorey's (4th Quarter, 2004)/BAG

Of the study area's ten industrial projects, the largest are Shawnee Ridge with 1,537,964 square feet and Horizon (including Horizon Park and Horizon Business Distribution Center) with 1,356,402 square feet. There are a number of smaller projects and single building developments as well. Building sizes range between 10,000 square feet to 267,600 square feet with an average size of 144,912 square feet. The predominant use is Warehousing with 3,019,473 square feet (54.8%) while Distribution represents 35.3% of the space with 1,945,601 square feet. The majority of the inventory was built after 2000 (52.6%) while 37.1% was built in the 1990's and 10.3% built in the 1980's. The study area has 1,525,849 square feet of available space, or 20.9% of the inventory.



Exhibit 3: Industrial Projects at Exit 111

Name	Address	Total SF	Available SF	Year	Lease Rate	Use*	Map**
2500 Northridge Drive	2500 Northridge Drive	104,000	-	-	\$3.25	D	15
3211 Shawnee Industrial Way	3211 Shawnee Industrial Way	62,400	32,000	2004	\$5.00-\$6.00	D	21
3620 Lawrenceville-Suwanee Road	3620 Lawrenceville-Suwanee Road	10,000	6,250	1981	-	S	9
Horizon	250 Horizon Drive	1,356,402	317,714	1995	\$2.95-\$4.95	W/D	8
Merchants Landing	3550 Lawrenceville-Suwanee Road	51,200	4,400	1987	-	S	11
Northbrook	1000 Northbrook Parkway	742,480	546,280	1991	\$3.65-\$7.00	D/S/W	13/14
Satellite Ridge Business Park	450-470 Satellite Blvd NE	159,815	9,665	2001	-	D	20
Shawnee North Business Center	305-315 Shawnee North Drive	204,400	11,200	1999	\$6.50	D	22
Shawnee Ridge	Satellite Blvd NW	1,537,964	567,108	1996	\$2.75-\$6.25	D/S/W	23
Shawnee Creek	Satellite Blvd NE	1,278,013	31,232	2001	\$3.45-\$5.75	D/S/W	3/4
<i>Summary</i>		<i>5,506,674</i>	<i>1,525,849</i>	<i>1995.7</i>	<i>\$2.75-\$7.00</i>		

* D (Distribution), S (Service), and W (Warehouse)

** See A3: Industrial Projects at Exit 111 (Map)

Source: Dorey's (4th Quarter, 2004)/BAG

Traditionally, the study area has been attractive to industrial investors due to low land prices and easy access to the regional transportation network. While industrial owners remain pleased with their properties and are interested in further investment in new properties, traffic congestion and increased competition from other types of development are pushing land costs beyond the price-point of investors of industrial properties.

Within the study area, there have been a few instances of property crime, but property owners and managers are happy with the rapid police response and presence and the effects of increased security measures.



The Retail Market

Not surprisingly, given the strong residential growth in the area, the I-85 Corridor has evolved into a major retail location serving Gwinnett and the Northeast Atlanta region. Suwanee is located between two major retail submarkets- Northeast Gwinnett County, which is home to the Mall of Georgia, and the Peachtree Corners/Norcross/I-85 submarket, which is anchored by The Gwinnett Place Mall and Discover Mills. These two retail submarkets contain a combined 24 million square feet of retail space. Currently, there is approximately 2.4 million square feet available for lease, or 10.2%. Lease rates for retail space range broadly from \$7.00 to \$60.00 per s.f., with rents for space in regional malls in the \$35.00 to \$60.00 per s.f. range, neighborhood centers \$8.00 to \$22.50 per s.f. and stand alone retail at the lower end of the range.

The retail space in the submarket is allocated among major retail uses as follows:

Regional Mall	20%
Power Center	8%
Anchored or Community Center	42%
Neighborhood Center	18%
Unanchored Center	5%
Business/Service/Misc.	7%

With occupancies generally strong, there continues to be significant new additions to retail inventory. In the market area there is 1.0 million square feet of new projects under construction which represents 4.2% of the available inventory.

Exhibit 4: Regional and Study Area Retail Inventory

	Total S.F.	Available/ Vacant	Available %	Asking Rents	Under Construction
Northeast Gwinnett County	12,979,593	1,263,293	9.7%	\$9.00-\$28.00	502,336
Peachtree Corners / Norcross / I-85	11,027,987	1,182,558	10.7%	\$7.00-\$60.00	504,170
Total Market Area	24,007,580	2,445,851	10.2%	\$7.00-\$60.00	1,006,506
Study Area (Exit 111)	532,496	22,600	4.2%	\$14.00-\$24.00	0

Source: Dorey's (4th Quarter, 2004)/BAG

The retail sector of Exit 111 has transitioned from a collection of stand-alone retail outlets primarily catering to interstate travelers to larger neighborhood and community centers focused on the residential development surrounding the area. With the opening of the Wal-Mart, there has been increasing interest from developers to create additional centers anchored by major national discount retailers. In the study area, there are 8 major centers as well as several stand alone retail establishments. The major retail centers in Suwanee account for only a small portion, 2.6%, of the Northeastern submarket with a total of 532,496 square feet.

The majority of the centers in the study area are less than 50,000 square feet with the largest, Suwanee Crossroads, location of the Wal-Mart, at 208,000 square feet. There are three anchored community centers, four unanchored centers, two neighborhood centers and one business service center. The highest asking rents in the study area, \$17.00-



\$24.00 per s.f., are for the anchored strip centers while the lowest are for neighborhood centers at \$14.00-\$18.00 per s.f. Locationally, most of the retail development is concentrated on or very near Lawrenceville-Suwanee Road, distributed evenly north and south of the interstate. Sixty percent of the centers have been built since 2000, with an average age of nine years, showing the recent arrival of significant retail in the area.

Exhibit 5: Retail Projects at Exit 111

Name	Address	Total SF	Available SF	Year	Asking Rents	Use	Map*
Blockbuster Center	2815 Lawrenceville Suwanee Road	11,050	-	1996	\$19.00	Unanchored Center	5
Crestridge Station	95 Crestridge Drive	12,600	4200	2001	\$17.00	Unanchored Center	6
Horizon Village	2855 Lawrenceville Suwanee Road	98,896	1200	1996	\$14.00	Neighborhood Center	7
Ingle's at Suwanee	2850 Lawrenceville Suwanee Road	57,250	-	1988	\$16.00-\$18.00	Neighborhood Center	8
Main Street Shops at Georgetown	3447 Lawrenceville Suwanee Road	24,000	2600	2002	\$18.00-\$24.00	Anchored Center	9
Merchants Landing	3550 Lawrenceville Suwanee Road	51,200	4000	1987	-	Business Service	15
Old Peachtree Marketplace	45 Old Peachtree Road	-	5600	2003	\$17.00	Unanchored Center	18
Suwanee Crossroads	3245-3265 Lawrenceville Suwanee Road	277,500	5000	2002.	\$20.00	Anchored Center	22/23
Summary		532,496	22,600	1996	\$14.00-\$24.00		

* See A4: Retail Projects at Exit 111 (Map)

Source: Dorey's (4th Quarter, 2004)/BAG

As mentioned above, there is significant interest in new retail development, especially large centers anchored by national chains, drawn to the area by the new Wal-Mart. Construction will begin soon on a new center anchored by Office Depot on Lawrenceville-Suwanee Road. Prospective buyers of several of the area's undeveloped parcels are focusing on big box retail as a potential land use for the area. There is also interest in redeveloping some of the older retail properties along Suwanee-Lawrenceville Road.

Several prominent retail vacancies exist in the study area, notably the former Ingles Supermarket on Lawrenceville-Suwanee Road and an Amoco gas station at the Exit 111 interchange. However, current retail rents in the study area of \$10.00-\$14.00 per square foot do not make redevelopment of these properties economically feasible. At these rates, the cost of refurbishing these properties would be more expensive than the potential increase in rents. According to developers in the area, rents must increase approximately \$2.00-\$4.00 per square foot before redevelopment of the older retail stock is economically realistic.

The Office Market

While many of the industrial properties described above also contain office uses, there is a relatively small amount of distinct office space in the study area. The study area has a total of 505,594 square feet of office space, accounting for 3.2% of the Northeast I-85 submarket.

The Northeast office submarket totals some 15,796,311 square feet. Though office space in the Northeast market tends to be scattered throughout the area, there are concentrations at Jimmy Carter Boulevard, Gwinnett Place Mall, and Duluth-Lawrenceville Highway.

Exhibit 6: Regional and Study Area Office Inventory

	Study Area (Exit 111)	Northeast I-85
Total Square Feet	505,594	15,796,311
Market Share*	3.2%	4.9%
Vacancy Rate	-	27.4%
Rental Rates	\$15.00-\$23.50	\$13.00-\$23.50
Under Construction	0	887,124

* Study area's share of Northeast I-85 submarket and Northeast I-85's share of Atlanta market

Source: Dorey's (4th Quarter, 2004)/BAG

The Northeast office market represents 4.9% of the overall Atlanta office market of 128 million square feet. The office market both throughout the Atlanta region and within the Northeast I-85 submarket has been experiencing a period of high vacancies and soft demand. The overall office vacancy rate for the Atlanta region was 22.5% at the end of 2004, and 27.4% in the Northeast I-85 market. The prolonged softening in the market has continued since the recession of 2001 as a result of a combination of the dot.com collapse and realignments in the region's telecommunications, high tech, utilities and transportation sectors. While a regional economic recovery has been underway since 2002, it has not resulted in robust growth in the sectors of the economy which generate office demand and has been strongest in retail, construction and healthcare sectors.

Within the study area, the inventory of office space is approximately 505,594 square feet, which is 3.2% of the northeast I-85 office submarket. There is 89,622 square feet of available space, 17.7% of the total inventory, which compares favorably with office trends in the submarket, but is still a major impediment to new office development. Lease rates range from \$15 to \$23.50 per s.f., which is comparable to lease rates in the submarket.

There are two business parks with office space, Office Green and Shawnee Ridge, which contain 80.5% of the study area's office space. The remaining 20% of office space is located in free standing buildings. All of the office buildings in the study area were built between 1999 and 2001, with an average age of five years.

The study area lacks a well defined office sector with the current space in low-rise configurations not visible from the Interstate. The character of the area has been dominated by industrial uses rather than office development. Shawnee Ridge has the



largest concentration of office space and several potential projects have recently been announced to the south and west of the study area. In addition, there have recently been major tenant signings in the Huntcrest mixed-use development with the recent announcement of Best Software coming to the project. The Huntcrest project represents the major concentration of office space in the market area and is highly competitive with any office space developments in Suwanee.

Exhibit 7: Office Projects at Exit 111

Name	Address	Total SF	Available SF	Year	Rent	Use	Map*
George Towne Square	Lawrenceville Suwanee Road	80,000	1,316	2000	-	Office	1
Morningview Professional Center	4000 Smithtown Road	20,000	2,000	-	-	Office	4
Office Green - Bldgs 1-9	2910-2955 Horizon Park Drive	48,194	2,306	2000	\$15.00	Office Park	5
Shawnee Ridge - Bldgs 1-4	300 Satellite Blvd NW	303,000	70,000	2000	-	Office	9
Suwanee Creek Business Center	140 Satellite Blvd NE	54,400	14,000	2001	\$23.50	Flex Space	23
<i>Summary</i>		505,594	89,622	2000	\$15.00-\$23.00		

* See A5: Office Projects at Exit 111 (Map)

Source: Dorey's (4th Quarter, 2004)/BAG



The Hotel Market

Gwinnett County Hotel Trends

At the end of 2004, Gwinnett County had 96 properties comprising 10,694 hotel rooms. The hotels are predominantly limited service, with only a handful offering full-service amenities. Supply growth has been moderate, 2.4% on a compound annual basis between 1999 and 2004. A majority of hotels are clustered along the I-85 corridor, as well as in the surrounding cities of Lawrenceville, Stone Mountain, Snellville, and Norcross.

The following table illustrates the number of hotel rooms and properties available in Gwinnett County for the past six years.

Year	Rooms	Properties
1999	9,504	82
2000	9,596	83
2001	9,832	86
2002	10,183	91
2003	10,551	95
2004	10,694	96
CAGR '99-'04	2.4%	3.2%

Source: Smith Travel Research

In 2004, Suwanee represented 7% of the Gwinnett County hotel supply. In comparison, Suwanee captured 5% of new supply added between 2000 and 2004. The largest supply increase in Gwinnett was experienced in the Buford area due to the development of the Mall of Georgia; and in Duluth, with the Civic Center expansion and opening of Discovery Mills Mall. While no new supply is anticipated in the near term, interest has been expressed in the Old Peachtree/Exit 109 intersection for future development of full-service hotels.

	Rooms	Percent
Buford	438	37%
Duluth	330	28%
Lawrenceville	179	15%
Stone Mountain	72	6%
Suwanee	65	5%
Snellville	60	5%
Norcross	46	4%
<i>Total New Supply</i>	<i>1,190</i>	<i>100%</i>

Source: Smith Travel Research

Suwanee Hotel Trends

Suwanee is home to nine hotels comprising 761 guest rooms. The following table summarizes key physical attributes of the hotels:



Exhibit 10: Key Physical Attributes of Hotels

Suwanee Hotels	Year Open	Rooms	Corridors	Amenities*	Renovation
Admiral Benbow	1968	120	Exterior	O	na
Motel 6	1974	121	Exterior	O, M	\$0.5M 02-04
Fairfield	1998	79	Interior	I, C	\$0.3M '05
Courtyard	1999	78	Interior	I, R, M	\$3M in '05
Comfort Inn	1968	79	Exterior	O, C	na
Comfort Suites	May-03	65	Interior	I, C, M	na
SunSuites	1997	127	Exterior	none	na
Ramada Limited	1974	42	Exterior	C	na
Red Roof Inn & Suites	1996	50	Interior	O, C	na

*O=Outdoor Pool; I=Indoor Pool; C=Complimentary Breakfast; R=Restaurant; M=Meeting Space

Source: Key Advisors

The hotel stock in Suwanee is mature, with an average age of 19 years; four of the hotels being more than 30 years old. Five of the hotel properties have exterior corridors, considered antiquated in the industry. While the nine properties offer diversity in price, market orientation, and product styles, none of the hotels offer full-service amenities.

The Motel 6 underwent an extensive renovation improving the exterior façade as well as guest rooms. Management anticipates the hotel will achieve stronger occupancy and rate with the renovation now complete as well as the change in brand affiliation. The Fairfield Inn will undergo a rooms renovation and the Courtyard is slated for an extensive, \$3 million renovation. The renovations are anticipated to keep the hotels competitive within the market.

The following table presents operating information on the nine Suwanee hotels.

Exhibit 11: Operating Information for Hotels

Suwanee Hotels	Rooms	Estimated 2004			Demand Segmentation		
		OCC	ADR	RevPAR	Commercial	Group	Leisure
Admiral Benbow	120	25% - 29%	\$25 - \$29	\$5 - \$9	65	0	35
Motel 6	121	25% - 29%	\$30 - \$34	\$5 - \$9	30	25	45
Fairfield	79	65% - 69%	\$60 - \$64	\$40 - \$44	68	15	17
Courtyard	78	70% - 74%	\$70 - \$74	\$50 - \$54	65	25	10
Comfort Inn	79	60% - 64%	\$60 - \$64	\$35 - \$39	40	15	45
Comfort Suites	65	50% - 54%	\$70 - \$74	\$35 - \$39	75	10	15
SunSuites	127	75% - 79%	\$30 - \$34	\$25 - \$29	85	0	15
Ramada Limited	42	40% - 44%	\$30 - \$34	\$10 - \$14	70	0	30
Red Roof Inn & Suites	50	45% - 49%	\$30 - \$34	\$15 - \$19	65	0	35
Total/Average	761	51%	\$47.61	\$24.42	65%	10%	25%

Source: Properties concerned, STR

Individual hotel performances vary widely. Occupancy levels (OCC) range between 25% and 80%, average daily rate (ADR) ranges between \$25 and \$75, and RevPAR (Revenue per Available Room) ranges between \$5 and \$50. With limited meeting

facilities available, demand is primarily transient in nature. Approximately 10% of total demand in the market is group related, 65% is commercial, and 25% is leisure.

Despite low occupancy and rate levels experienced in 2004, the 2005 forecast is for an increase in RevPAR of more than 10%. This improving performance is attributable to:

1. the improvements at Motel 6, Fairfield, and Courtyard;
2. increased utilization generated by the Gwinnett Civic Center and Suwanee Sports Academy; and
3. the general strengthening of the economy coupled with no new hotel supply in the area.

Demand Segmentation

Demand sources include commercial transient, group, and leisure segments. Commercial transient comprises salesmen, corporate training, truck drivers, construction workers, and extended-stay. The group segment comprises demand related to events at the Civic Center, sporting events, corporate meetings, and bus tours. The leisure segment includes demand related to interstate travel, events occurring throughout the metropolitan area, and "locals".

Gwinnett Civic Center

The nearby Gwinnett Civic Center ("Center") was expanded in 2002 including the addition of a 13,000-seat arena and 21,600 square feet of ballroom space. This space was added to compliment the existing 50,000 square feet of exhibition space, 10,000 square feet of meeting space, and 700-seat performing arts center. The Center, professionally marketed and managed by SMG, is host to a number of concerts, sporting events, and consumer shows. The Gwinnett Convention and Visitors Bureau also works closely in marketing the facility. A portion of the Gwinnett County bed tax has been allocated to assist with operating shortfalls; however, in 2003, the Center began operating at a profit.

The following table summarized event activity at the Center for 2003 and 2004.

	Arena			Civic Center			Total		
	Events	Event Days	Attendance	Events	Event Days	Attendance	Events	Event Days	Attendance
2004	84	123	503,463	384	651	229,521	468	774	732,984
2003	70	87	477,731	529	839	351,263	599	926	828,994
<i>Percent Change</i>	20.0%	41.4%	5.4%	-27.4%	-22.4%	-34.7%	-21.9%	-16.4%	-11.6%

Source: Key Advisors

Event activity at the Arena has increased significantly in 2004, while events held at the Civic Center have declined. In total, the Center hosted approximately 733,000 attendees in 2004, of which nearly 70% are Arena related. Approximately 80% of Arena attendance is generated locally. Civic Center attendants comprise both local residents and out-of-town visitors. As a result of the expansion of the Civic Center, it should begin to attract additional conventions which should improve hotel utilization near the

facility. With the exception of those located at the same intersection as the Center, Suwanee hotels are considered to be the next closest to the Center.

Suwanee Sports Academy

The Suwanee Sports Academy (“SSA”) is one of the largest private sports facilities of its kind in the country. With over 92,000 square feet of space, it offers 7 NBA regulation basketball courts and 9 volleyball courts. The facility hosts a number of local, state, regional and national tournaments and summer camp programs. In addition to hosting events, the SSA is home to a Christian school for 60 students, (grades Kindergarten through 4th), offers after school programs, and features performance training classes for local students. The SSA opened in 1997 and was purchased by the current owners in 2002. The current business plan calls for the expansion of local programs as well as growing the national event market. In 2004, SSA hosted 29 events totaling 88 event days. Ten of the events were of National/Regional scope. While hotel demand stemming from hosted events is not tracked, it is estimated that 10,000 to 15,000 room nights are currently generated during the peak activity season during summer and on 3-day weekends throughout the year. Suwanee hotels are the closest to the SSA and should benefit from its success.

Road Atlanta / Braselton Racing Venues

Though they attract a large number of participants to a growing range of events, Road Atlanta and other racing venues near Braselton were not cited by GCVB or hotel operators as significant demand generators for Suwanee Hotels.

Gwinnett Convention & Visitors Bureau

The Gwinnett Convention and Visitors Bureau (“GCVB”) operates with an annual budget of more than \$2.2 million. A staff of 12 persons is responsible for generating approximately 250 to 275 leads annually for the 96 Gwinnett area hotels. Marketing efforts include attendance at approximately 35 trade shows annually. Leads generated range from religious conventions, sporting events, family reunions, and bus tours. Approximately 15 county-wide events occur annually, 5 of which are hosted at the Suwanee Sports Academy.

The following table summarizes major events hosted in Gwinnett County.

Exhibit 13: GCVB Major Events

Event	Type	Venue	Attendees	Rooms
Injoy	Religious	Center	12,000	4,000
Georgia Baptist National Convention	Religious	Arena	7,500	2,900
Salvation Army National Convention	Religious	Center	6,000	5,000
Jehovah's Witness Congress	Religious	Arena	10,000	7,800
Garden Club of Georgia	Association	Center	na	na
Mary Kay Cosmetics	Corporate	Center	na	na
SEC Women's Gymnastics Championships	Sports	Arena	na	na
Youth Basketball of America Championships	Sports	SSA	na	900
Adidas Superstar Camp	Sports	SSA	na	3,000
Adidas Top Ten Basketball Camps	Sports	SSA	na	3,000
Georgia High School Basketball Championships	Sports	Center	na	500
AAU Regional Karate Championships	Sports	Center	na	800
AAU Regional Synchronized Skating Championships	Sports	Arena	2,400	1,200
YMCA of Georgia Basketball Championships	Sports	SSA	na	245
Mike White Basketball Championships	Sports	SSA	na	4,000

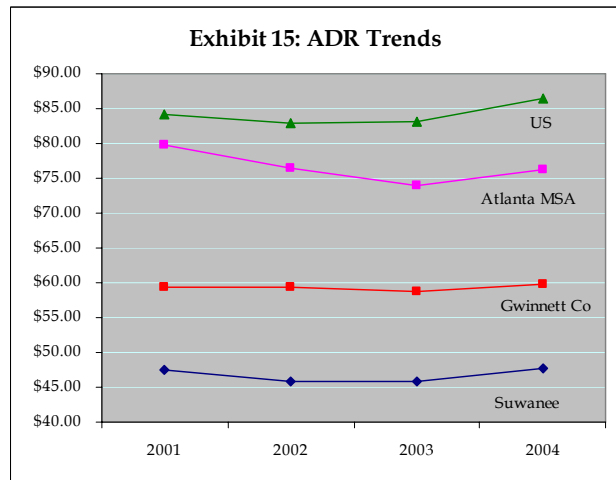
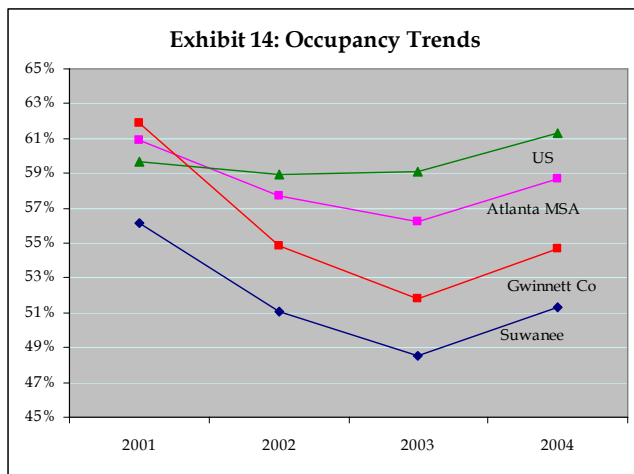
Source: GCVB

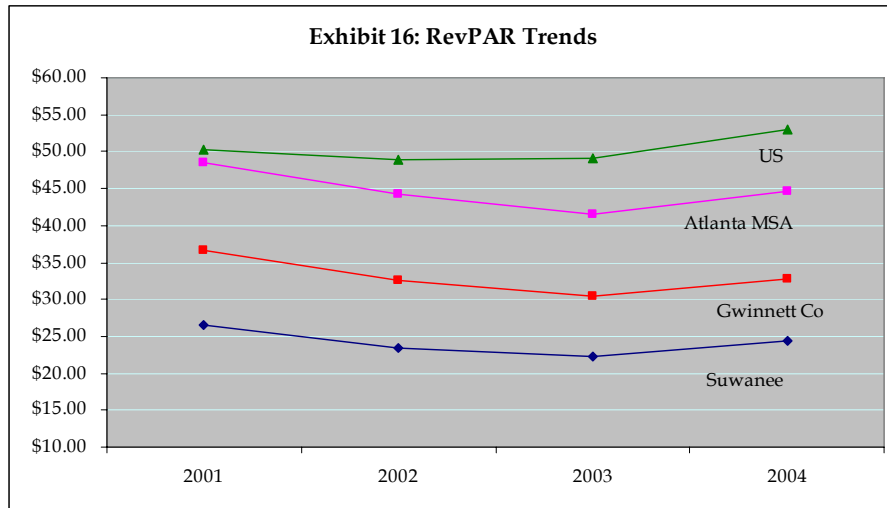
In addition, the GCVB’s website with on-line booking capabilities, the visitor guide, and coupon redemption programs offering special rates and discounts stimulate transient demand. The GCVB’s 2005 goal is to generate a total of 125,000 room nights for Gwinnett hotels.

The following chart summarizes expenditures at the GCVB, which totaled \$2.28 million in 2004.

Performance Trends

The recent performance of Suwanee hotels is following the same upward trends experienced in the U.S., Atlanta MSA, and Gwinnett County. However, Suwanee hotels trail, by a considerable margin, occupancy, ADR and RevPAR performance levels as the following charts illustrate.

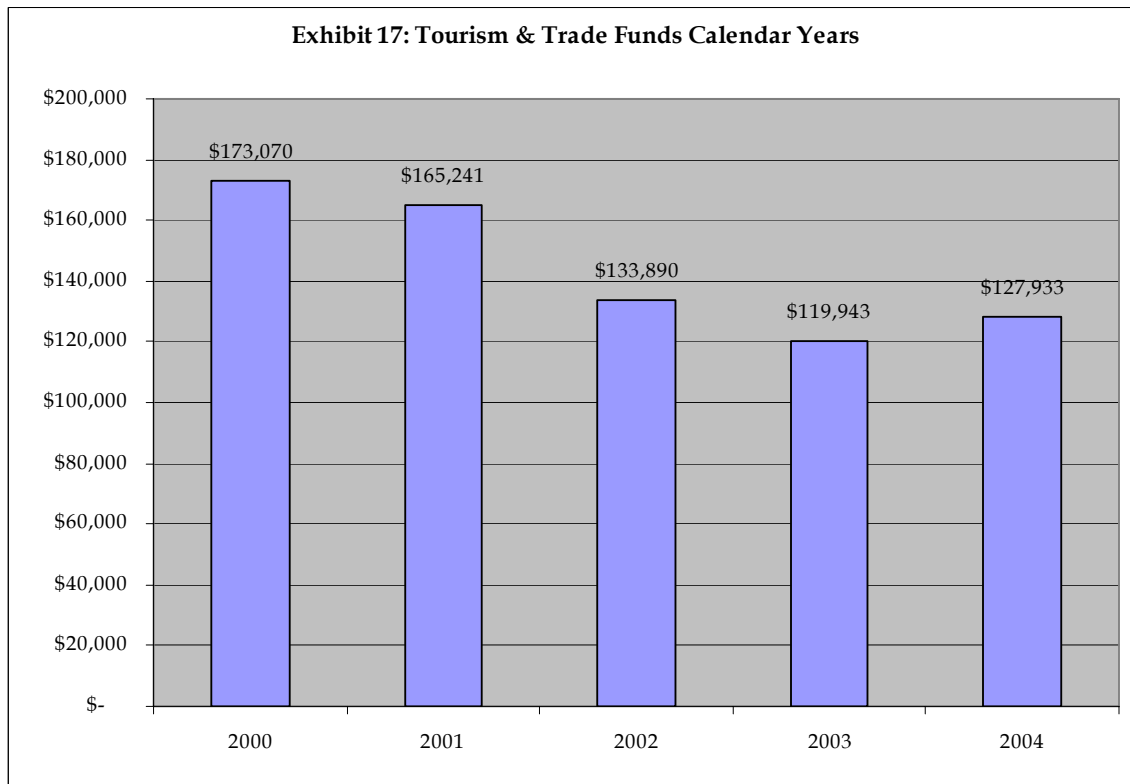




Source: Smith Travel Research

Suwanee Bed Tax

Currently, the City of Suwanee imposes a 5% lodging tax, of which 40% is allocated to the Tourism & Trade Fund. The following table illustrates the Tourism & Trade Funds collected, on a calendar year basis, between 2000 and estimated 2005.



Source: City of Suwanee

Tourism & Trade Funds declined in 2002 and 2003 coinciding with RevPAR declines, however they increased in 2004 with improvement in occupancy and rate levels. Based



on increasing occupancies in the first portion of the year, we anticipate that Tourism & Trade funds collected in 2005 will increase significantly to approximately \$150,000.

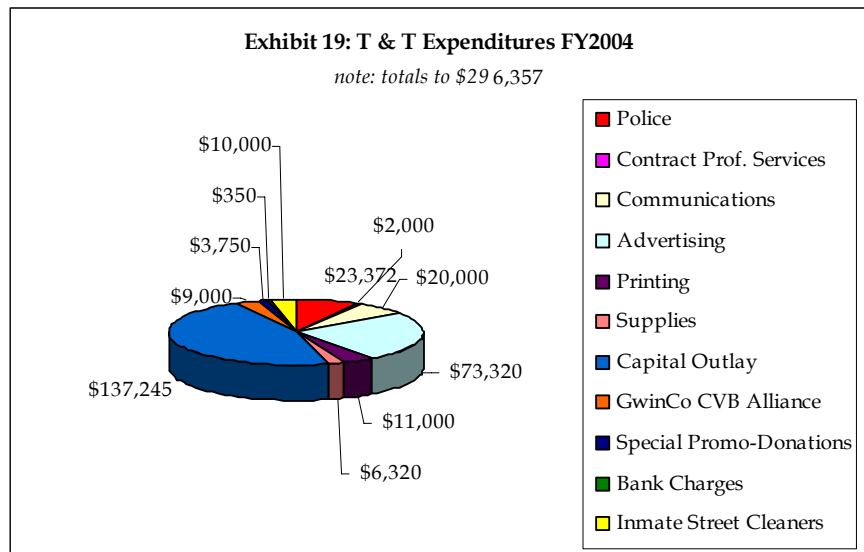
Suwanee bed tax, at 5%, compares favorably to Gwinnett County at 7%. The following table illustrates bed tax rates in other relevant locations.

Exhibit 18: Bed Taxes - Comparable Locations

	Tax
Norcross	3%
<i>Suwanee</i>	5%
Lawrenceville	5%
Snellville	5%
Gwinnett County	7%
DeKalb County	7%
Fulton County	8%

Source: Key Advisors

The City may want to consider the costs and benefits of raising the bed tax rate. However, this is a complex issue which requires additional analysis beyond the scope of this report. While the Tourism & Trade Fund was \$125,000 in FY2004, the budget was approximately \$300,000. The following chart summarizes the Tourism & Trade Fund expenditures in FY2004.

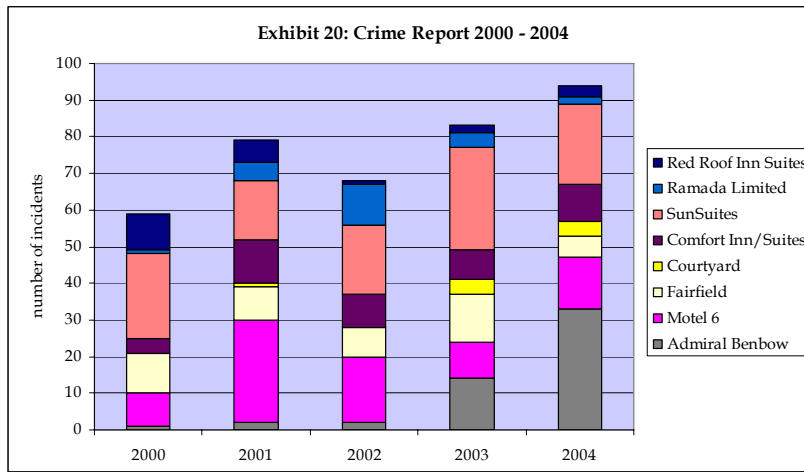


Source: City of Suwanee

Advertising expenses, \$73,320, are primarily related to billboards and costs associated with the production of a travel guide. Communications costs, \$20,000, consist of website costs. Capital outlay of \$137,245 represents the planned implementation of the streetscape program, which has been deferred in 2005. Given the incidents of crime at several area hotels, the additional cost for police protection, \$23,372, is vital to the long-term reputation of the area.

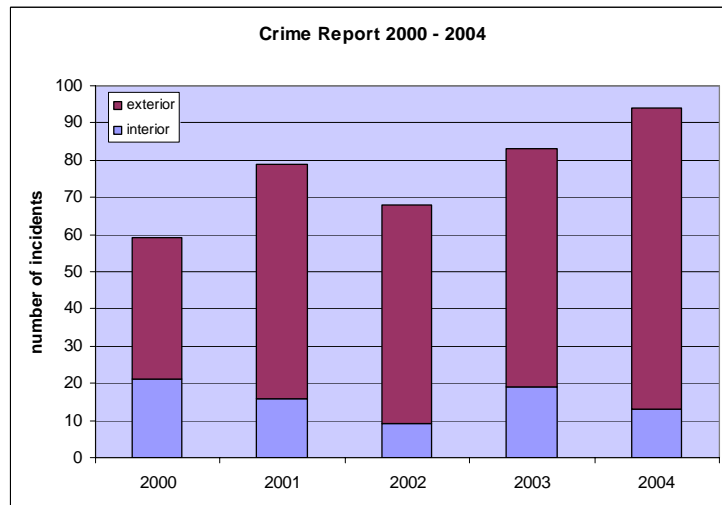
Crime Statistics

The level of crime continued to increase at Suwanee hotels over the past three years. As the following chart illustrates, the SunSuites and Admiral Benbow report the largest number of incidents.



SunSuites has historically had a high rate of incidents. According to Suwanee’s police department, in their experience, extended stay hotels tend to attract more criminal activity. The amount of crime at the Admiral Benbow has increased over the years in line with changes in its brand affiliation and increases in extended stay clientele. Crime at the Motel 6 has declined given the recent renovations that have occurred and a change in branding.

As shown in the chart above, the level of crime is consistently higher the last several years in the hotels which have exterior hallways than in the hotels with interior hallways. Thus, crime could be mitigated by prohibiting any more hotels with exterior hallways and requiring the existing hotels to enclose their hallways by a specific future date.



Situation Analysis

The key dynamics occurring in Gwinnett County and the Suwanee hotels are summarized below.

- *Distinct Property Types*
The nine hotels located in Suwanee fall into two distinct categories:
“Older Properties”
“Newer Properties”
Both types of hotels have unique needs regarding marketing support. Older Properties are generally owner operated and rely on billboard advertising, coupon books, highway visibility, and brand affiliation to drive room demand. Very little effort goes into marketing the hotel. The Older Properties are generally less desirable. The Newer Properties often have professional management companies with a sales staff to proactively seek volume accounts and group business. While they also rely on brand affiliation and location along the highway, there is more active sales effort made to stimulate demand. The Newer Properties are more likely to seek assistance with lead generation and benefit from the GCVB’s group marketing efforts. These hotels generally outperform the market in terms of occupancy and rate.
- *Suwanee-Gwinnett County Market Overlap*
The hotels in Suwanee and those located in Gwinnett along the I-85 corridor generally have similar hotel products and target customers. Suwanee hotels benefit from the marketing efforts made by the GCVB for both transient and group demand. To duplicate the efforts of the GCVB would be inefficient. However, services provided by the GCVB do not necessarily meet all the needs of the Older Properties which are less oriented to conventions and business travel. Suwanee hotels continue to benefit from billboard advertisement as well as additional police support, both of which are not provided through the GCVB.
- *Suwanee Sports Academy*
The Suwanee Sports Academy is a large room night generator in the community. It currently does not control hotel room usage, but rather delegates the GCVB as the housing bureau for many of the larger events. Hotel demand in Suwanee could increase in the future, should the SSA focus on attracting additional national and regional events. While Suwanee hotels are located in close proximity to the SSA, attendees of the events tend to utilize newer, interior corridor hotels, located at Exit 108 and Exit 115 highway exits.
- *Gwinnett Civic Center and Arena*
Potentially a large source of hotel demand, the Civic Center primarily caters to events and shows with a strong local draw. However, with the additional ballroom space and availability of a new hotel in walking distance, the Center can now draw larger, non-local events which will increase demand for other hotels in the area, including those in Suwanee. Suwanee’s hotels will benefit

from this demand to some degree, but will always be at a competitive disadvantage to hotels located closer to The Civic Center.

- *Development Trends*

New additions to supply will be limited in the near term which should allow for continued increases in occupancy levels. Future development will be intense at adjacent exits to the north and south. Exit 111 is at a competitive disadvantage-perceived as unattractive, with difficult traffic, and lacking a clear identity between two newly developed, robust areas around the adjacent exits.

TRANSPORTATION PATTERNS

Lawrenceville-Suwanee Road is the primary roadway in the study area that provides connectivity to the Atlanta region and to greater Gwinnett County. The I-85/Lawrenceville-Suwanee interchange at Exit 111 provides extensive regional access, and Lawrenceville-Suwanee Road's connection to important regional arterials connects the area to surrounding Gwinnett. This existing road network results in the study area experiencing several types of traffic. The readily accessible interstate accommodates local commuters and the movement of freight associated with surrounding neighborhoods and industrial uses, respectively, and Lawrenceville-Suwanee Road is the access point for this traffic. Lawrenceville-Suwanee Road also experiences heavy local traffic due to the concentration of commercial businesses in the area. On a regional level, it is a primary means of accessing central and eastern Gwinnett County.

The study area's road network also serves a larger region due to the proximity of McGinnis Ferry Road. The section of McGinnis Ferry from Peachtree Industrial Boulevard to Satellite Boulevard serves as an integral east-west arterial from Gwinnett County to South Forsyth County, resulting in thru-traffic finding its way to the Lawrenceville-Suwanee Road interchange. In addition, the study area accommodates traffic from visitors from outside the area due to its concentration of accessible hotels and restaurants.

The most recent traffic counts compiled by the Gwinnett Department of Transportation help to illustrate the intensity of traffic in the area, particularly along Lawrenceville-Suwanee Road:

Exhibit 21: Estimated Average Daily Traffic Counts (ADT)

Road	Section	Est. ADT	Date
I-85 NB Off Ramp	Between Lawrenceville-Suwanee Road and I-85	20,716	12/12/02
I-85 NB On Ramp	Between I-85 and Lawrenceville-Suwanee Road	12,736	12/11/02
I-85 SB Off Ramp	Between Lawrenceville-Suwanee Road and I-85	11,510	12/11/02
I-85 SB On Ramp	Between I-85 and Lawrenceville-Suwanee Road	17,105	12/11/02
Lawrenceville-Suwanee Road	Between I-85 and Satellite Boulevard	52,121	3/10/04
Lawrenceville-Suwanee Road	Between I-85 and Old Peachtree Road	50,684	9/2/03
Satellite Boulevard	Between McGinnis Ferry and Lawrenceville-Suwanee Road	15,124	1/15/04
Horizon Drive	Between Old Peachtree Road and Lawrenceville-Suwanee Road	21,250	9/21/04

Source: Gwinnett County Department of Transportation

Lawrenceville-Suwanee Road between Satellite Boulevard and Old Peachtree Road -- the heart of the study area -- is handling over 50,000 trips per day, which reflects the many sources of traffic demand that are all competing to use this important roadway.

Transportation Improvements

The growing congestion that has resulted from sustained growth in the area is being addressed through a series of transportation system improvements. The planned 2.67 mile McGinnis Ferry Road Extension, with an anticipated construction start date of



2007, is the primary project with the potential to reduce current levels of congestion. It will begin to create a grid system of roadways within the study area, which will provide alternative routes and will lessen dependency on the Lawrenceville-Suwanee interchange. As currently proposed by the Gwinnett County Department of Transportation and the Georgia Department of Transportation (GDOT), the proposed components of the project are as follows: *

- The extension of McGinnis Ferry Road will connect to the existing intersection of McGinnis Ferry Road and Satellite Boulevard and will continue east along Burnette Road, which will be widened to four lanes;
- Burnette Road will terminate in a cul-de-sac just north of the Extension;
- The Extension will cross I-85 via a bridge, which will be constructed to provide for future additional lanes on Interstate 85 and for a possible future HOV interchange;
- Gwinco Boulevard will be extended to McGinnis Ferry Extension with a right-in, right-out only connection;
- A full signalized intersection with pedestrian facilities will be provided at Old Peachtree and McGinnis Ferry Extension;
- An additional connector will be constructed between Gwinco Boulevard and Old Peachtree Road (between McGinnis Ferry Extension and Lawrenceville-Suwanee Road). Suwanee should seek a name for this new connection that ties into the Celebration Drive theme for Gwinco Blvd;
- The median opening on Lawrenceville-Suwanee Road at Gwinco Boulevard will be closed, and a right-in, right-out only connection will be provided;
- Northbrook Parkway will be widened from its current northern terminus to the existing intersection of Old Peachtree Road and Gwinco Boulevard;
- Old Peachtree Road will be widened beginning at its intersection with Gwinco Boulevard through the intersection with Lawrenceville-Suwanee Road;
- McGinnis Ferry Extension will connect to Lawrenceville-Suwanee Road at a point approximately south of the vacant Ingle's store;
- The improved roadways are proposed to be four lanes with twenty-foot raised medians and will include five-foot sidewalks on both shoulders, with the exception of the provision of a ten-foot multi-use trail on the north side of the Extension;
- Additional improvements include the provision of turn lanes at the intersections, improved intersection timings and coordination with adjacent signals.

(See Map 6: Transportation Network Context and Map 7: Transportation Network)

In conjunction with the proposed McGinnis Ferry Road Extension, additional enhancements could augment a new grid system of roadways serving the study area, though not currently programmed. One alternative that has been discussed by the County and is part of the 2005 sales tax program, is an interstate overpass at Smithtown Road, just north of the Lawrenceville-Suwanee interchange. This overpass and the

* The above components are not endorsed by the City or the Research Team, but are merely documented as an indication of likely future conditions for planning purposes.



Extension overpass could expand the study area road network by connecting Satellite Boulevard and Old Peachtree Road/Horizon Drive, which in turn could provide additional routes to northern and eastern Gwinnett County that are not dependent on the Interstate. Effectively, Satellite Boulevard now connects all of the areas from Exit 108/109 to the south with Exit 115 to the north. Old Peachtree Road/Horizon Drive could provide a similar parallel access to the east of the Interstate. The McGinnis Ferry Extension and Smithtown overpasses could form a grid with Satellite, Old Peachtree and Horizon, thus improving access throughout the study area. This grid system is critical to lessen the dependence on Lawrenceville-Suwanee Road and to provide the traffic relief necessary for further commercial development of the area.

Pedestrian / Streetscape Issues


To help address pedestrian and aesthetic issues within the study area, the City adopted the Lawrenceville-Suwanee Road Streetscape Master Plan in 2004. The plan recommends streetscape improvements along Lawrenceville-Suwanee Road between Satellite Boulevard and Crestridge Drive, as well as Gwinco Boulevard. Proposed improvements include sidewalks, crosswalks, streetlights, landscaping, and street furniture such as benches and trash receptacles. In addition to facilitating pedestrian movement, the streetscape project can also contribute to the creation of a unique identity for the area.


The plan's recommendations are compatible with future development of the area and should be implemented as opportunities permit. Appropriate examples include the sidewalk and median designs for the McGinnis Ferry Extension project, which will require communication with Gwinnett County and GDOT.


Attention should also be paid to way-finding signage, which is not fully addressed in the Streetscape Plan. With anticipated changes to traffic patterns due to the McGinnis Ferry Road Extension project (e.g. right-in/right-out turns from Gwinco Boulevard onto Lawrenceville-Suwanee Road), it may be necessary to consider ways to help direct cars and pedestrians to local businesses. Even prior to these improvements it is often difficult to find businesses in the commercial clutter of the I-85 business district. In addition, signage can contribute to the overall identity and aesthetic of the area if it complements the street furnishings recommended in the Master Plan. Taller streetlights recommended in the plan are another means of creating visible markers to help give the study area its own identity. These streetlights can be consistent with the well-known style already used by the City, but a taller fixture is better scaled to the vehicular and pedestrian environment. These lights can also accommodate larger banners, whether they are the readily identifiable Suwanee banners already used or a new design unique to the study area.

Major Development Opportunities

The study area has a sizeable inventory of land that is suitable for development. These sites range in size, from the Motorola and Falcons properties that have the potential to develop as a vibrant mixed-use development, to smaller sites along Gwinco Boulevard that afford opportunities for new uses that can bolster the commercial identity of the immediate area. Seventeen total sites have been identified as potential development opportunities due to such factors as their location, development potential, proximity to new or planned projects, and their ability to contribute to the character that the City desires for the I-85 District. In some instances, several adjacent properties were assembled into a single "development opportunity" due to their availability and because their combined size results in a more feasible development site. In addition, eight new projects are identified on the *Development Opportunities* map to illustrate the nature and extent of other development that is slated to occur in the study area. (See Map 8: *Development Opportunities*)


SITE #1	Satellite Boulevard (City)
ACREAGE	2.33
ACCESS	Good (Satellite Boulevard/McGinnis Ferry Road)
VISIBILITY	Good (Satellite Boulevard/McGinnis Ferry Road)
ZONING	C-2
FUTURE LAND USE	Industrial
SURROUNDING LAND USES	Office/Warehouse/Distribution Centers
CURRENT ASSESSED VALUE	Estimated \$162,000
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Cleared/Undeveloped • Utility access likely • Formerly part of 14.31 acre parcel zoned M-1 that is slated for development 


SITE #2	Motorola (City)	
ACREAGE	106.19	
ACCESS	Good (Lawrenceville-Suwanee Road)	
VISIBILITY	Good (Lawrenceville-Suwanee Road)	
ZONING	M-1	
FUTURE LAND USE	Mixed Use Center	
SURROUNDING LAND USES	Commercial (east); Industrial (north); Residential (east/west); Vacant to the south	
CURRENT ASSESSED VALUE	\$16,461,700	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Wooded • Flat • Utility access likely 	


SITE #3	Former Falcons Site (City)	
ACREAGE	37.3	
ACCESS	Fair (Does not have direct access to Lawrenceville-Suwanee Road, although it is located right off I-85; Burnette Road’s potential cul-de-sac with the McGinnis Ferry Extention project will limit access.)	
VISIBILITY	Good from I-85 northbound	
ZONING	C-2	
FUTURE LAND USE	Mixed-Use Center	
SURROUNDING LAND USES	Commercial (east); residential (west); undeveloped (north)	
CURRENT ASSESSED VALUE	\$8,000,000	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Existing buildings on site • Lake on-site • Utilities accessible, but upgrades may be necessary 	





SITE #4	Diversified LTD./Sawmill Drive (City)
ACREAGE	22.7
ACCESS	Fair (off Sawmill Drive, just off of Lawrenceville-Suwanee Road)
VISIBILITY	Poor
ZONING	C2-A
FUTURE LAND USE	Commercial/Retail
SURROUNDING LAND USES	Commercial and industrial uses
CURRENT ASSESSED VALUE	\$878,500
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Wooded; primarily below grade • Utility access likely


SITE #5	Old Peachtree Painters, LLC
ACREAGE	25+
ACCESS	Good (Old Peachtree Road frontage)
VISIBILITY	Good (Old Peachtree Road frontage)
ZONING	M-1
FUTURE LAND USE	Light Industrial
SURROUNDING LAND USES	Residential; undeveloped to the west
CURRENT ASSESSED VALUE	\$1,742,000
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Wooded, flat • Utility access likely 


SITE #6	Old Peachtree/Northbrook Parkway Extension (County)
ACREAGE	8.85
ACCESS	Good (at proposed new intersection of Old Peachtree and realigned Northbrook Parkway)
VISIBILITY	Good
ZONING	C2-A
FUTURE LAND USE	Commercial/Retail
SURROUNDING LAND USES	Residential
CURRENT ASSESSED VALUE	\$544,900
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Existing single-family structures • Utility access likely • Partially wooded 


SITE #7	Peachtree 85 LTD/Gwinco Boulevard (City)
ACREAGE	15.23
ACCESS	Good (frontage on Old Peachtree and Gwinco)
VISIBILITY	Good (frontage on Old Peachtree and Gwinco)
ZONING	C2-A
FUTURE LAND USE	Commercial/Retail
SURROUNDING LAND USES	Commercial; residential
CURRENT ASSESSED VALUE	\$1,482,700
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Mostly wooded (small pines) • Proposed McGinnis Ferry Extension expected to bisect the property • Utility access likely 


SITE #8	Piglet Investment Group/South corner of Gwinco Blvd. (City)	
ACREAGE	2.81	
ACCESS	Good (frontage on Old Peachtree and Gwinco)	
VISIBILITY	Good (frontage on Old Peachtree and Gwinco)	
ZONING	C2-A	
FUTURE LAND USE	Commercial/Retail	
SURROUNDING LAND USES	Commercial (north); institutional (east and south); undeveloped (west)	
CURRENT ASSESSED VALUE	\$493,600	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Utility access likely • Partially wooded with small pine 	


SITE #9	SM Bishop Co. (County)	
ACREAGE	2.84	
ACCESS	Good (frontage on Old Peachtree Road)	
VISIBILITY	Good (frontage on Old Peachtree Road)	
ZONING	C2	
FUTURE LAND USE	Institutional/Public	
SURROUNDING LAND USES	Commercial; institutional	
CURRENT ASSESSED VALUE	\$791,800	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Small pines • Gwinco frontage may be insufficient for access/visibility • Utility access likely 	


SITE #10	Gwinray LP/ Gwinco Boulevard (City)	
ACREAGE	2	
ACCESS	Good (frontage on Gwinco Boulevard)	
VISIBILITY	Good (frontage on Gwinco Boulevard)	
ZONING	C2-A	
FUTURE LAND USE	Commercial/Retail	
SURROUNDING LAND USES	Commercial	
CURRENT ASSESSED VALUE	\$446,100	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Utility access likely • Partially wooded with small pine. 	


SITE #11	Shree Radhe Shyam Hospitality	
ACREAGE	2	
ACCESS	Good (frontage on Gwinco Boulevard)	
VISIBILITY	Good (frontage on Gwinco Boulevard)	
ZONING	C2	
FUTURE LAND USE	Commercial/Retail	
SURROUNDING LAND USES	Commercial	
CURRENT ASSESSED VALUE	\$557,600	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Small pines • Utility access likely • One of several available parcels on Gwinco Boulevard 	


SITE #12	BP Station (City)
ACREAGE	1.11
ACCESS	Excellent (on south side of interchange)
VISIBILITY	Excellent (on south side of interchange)
ZONING	C2
FUTURE LAND USE	Commercial/Retail
SURROUNDING LAND USES	Commercial
CURRENT ASSESSED VALUE	\$804,800
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Existing structures • Environmental issues/increased cost of redevelopment due to previous use • Utility access likely • Covenants prohibit certain uses 

SITE #13	McKibbon Bros./Old Peachtree east of Lawrenceville-Suwanee Road (City)
ACREAGE	2.22
ACCESS	Fair (frontage on Old Peachtree and on cut-through to Lawrenceville-Suwanee)
VISIBILITY	Fair
ZONING	C2
FUTURE LAND USE	Commercial/Retail
SURROUNDING LAND USES	Commercial
CURRENT ASSESSED VALUE	\$346,600
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Redevelopment opportunity • Existing foundation • Utility access likely • Visibility may improve with development of adjacent vacant sites 

SITE #14	FA Sims/NW corner of Old Peachtree and Horizon (City)	
ACREAGE	1	
ACCESS	Good (frontage on Old Peachtree and Horizon)	
VISIBILITY	Good (frontage on Old Peachtree and Horizon)	
ZONING	C2	
FUTURE LAND USE	Commercial/Retail	
SURROUNDING LAND USES	Commercial	
CURRENT ASSESSED VALUE	\$278,800	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Little vegetation • Utility access likely 	

SITE #15	Delcore Associates/NE corner of Old Peachtree and Horizon (City)	
ACREAGE	7.69	
ACCESS	Good (frontage on Old Peachtree and Horizon)	
VISIBILITY	Good (frontage on Old Peachtree and Horizon)	
ZONING	C2	
FUTURE LAND USE	Commercial/Retail	
SURROUNDING LAND USES	Commercial; industrial (east)	
CURRENT ASSESSED VALUE	\$1,029,100	
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Undeveloped • Wooded, fairly level • Utility access likely 	

SITE #16	Brand Partners/Horizon Drive Extension (County)
ACREAGE	140.10
ACCESS	Fair (at end of Horizon Drive Extension)
VISIBILITY	Fair
ZONING	M-1
FUTURE LAND USE	Light Industrial
SURROUNDING LAND USES	Light industrial (Horizon Creek Distribution Center)
CURRENT ASSESSED VALUE	\$5,613,300
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • Partially cleared • Largely wooded • Utility access likely • Can benefit from proximity of new development along Horizon Drive Extension • Potential for enhanced visibility along side abutting I-85 

SITE #17	South Lawrenceville-Suwanee Road (County)
ACREAGE	35.65
ACCESS	Good (frontage on Lawrenceville-Suwanee Road)
VISIBILITY	Good (frontage on Lawrenceville-Suwanee Road)
ZONING	R-100
FUTURE LAND USE	Low-Density Residential
SURROUNDING LAND USES	Commercial (north); residential
CURRENT ASSESSED VALUE	Approximately \$1,122,100
SITE DESCRIPTION (E.G. EXISTING STRUCTURES, TOPOGRAPHY, UTILITY ACCESS, ETC.)	<ul style="list-style-type: none"> • A few existing structures • Largely wooded • Utility access likely • Assemblage required (site consists of three parcels) 

Competitive Intersection Analysis

The future development of the study area will not occur in a vacuum, but will result from the appeal of the study area and its attributes in competition with other nearby areas for their share of regional development. As indicated in the earlier section on development trends, the Northeast I-85 Corridor continues to attract a great deal of development interest and will likely continue to do so over the coming decades. Understanding what competitive pressures Exit 111 / I-85 Business District will face as it seeks to secure its development future provides an important context for considering future development trends in the study area.

Two major concentrations of development and transit related improvements have emerged over the past decade and are impacting the development of the study area:

1. Exit 108/109 – Discover Mills / Gwinnett Civic Center
2. Exit 115 – Mall of Georgia

While taking very different development directions, the two exits which bracket the study area have emerged as “hot” development areas in the I-85 Corridor. Exit 108/109 serves the Discover Mills / Bass Pro Shops retail complex. The Mills concept offers discount/off-price retailing with strong regional appeal beyond the typical market area penetration of a more conventional regional mall. Opened in 2001, this 1.1 million square foot facility is a retail magnet for drawing shoppers and vendors to the area. The other key anchor is the Gwinnett Civic Center complex, which has evolved over the past decade to include convention facilities, the arena for entertainment and sport activities and additional meeting and arts space. As noted earlier, it is attracting attendance of 732,984 annually. The third anchor of the exit is the Sugarloaf master-planned community, which established this area of Gwinnett as an executive housing location. The development of these three anchors has attracted significant additional development to the Exit 108/109 interchange.

Exit 115 has undergone a major transition due to the development of the Mall of Georgia. This 1.7 million square foot regional mall and entertainment facility was developed in 1999. It’s a retail destination not only for much of Gwinnett County but also for the Northeastern quadrant of the Atlanta metro area and much of the non-urban portions of northeast Georgia. The development of the mall has attracted significant additional development in terms of national discount retailers, restaurants, hotels and new office and residential development.

The information which follows assesses the competitive position of the study area today versus the developments at the two adjacent exits. There is significant development activity occurring at both competitive interchanges which is attracting development momentum from the study area. However, as these intersections become more congested and targeted to certain types of development, it may create opportunities for the study area.



Industrial

There is more square footage of industrial space at Exit 111 than at either of the other exits. Thus, the study area dominates industrial development among the three competitive areas, with 57% of the total industrial space. Exit 108/109 has a significant, but smaller inventory of 3.8 million square feet. Vacancies are higher in the study area than at Exits 108/109 or Exit 115. There is very little industrial development at Exit 115, though numerous sites for industrial development are available.

Exhibit 22: Industrial Land Uses			
	Exit 111	Exit 108	Exit 115
Number of Centers	9	11	2
Total SF	5,506,674	3,873,256	276,084
Available	1,153,599	772,502	0
% Available	20.9	19.9	0.0
Year Built	1997	1995	1986
Rate	\$2.75-\$7.00	\$2.85-\$19.50	\$3.50-\$4.00

Source: Doreys/BAG

Retail

Due to the presence of Discover Mills at Exit 108 and The Mall of Georgia at Exit 115, there is significantly more retail square footage in these competitive areas than in the study area. There is 2.4 times the retail space at Exit 108 and 5.5 times the retail space at Exit 115 than in the study area. In addition to the significantly larger scale of the retail space at these two exits, they have attracted the top regional anchors, which can draw shoppers from a wide market area to the destination. By contrast, retailing in the study area is predominantly neighborhood and community oriented with food store anchored centers. Only the new Wal-Mart center provides an anchor with a more regional draw. Retail developments at the other interchanges are newer and have higher rental rates than at Exit 111. In addition to the Mall of Georgia, there is significant retail development at Exit 115 adjacent to the mall of discount retail, restaurants, and big box stores.

Exhibit 23: Retail Land Uses			
	Exit 111	Exit 108	Exit 115
Number of Centers	10	5	9
Total SF	532,496	1,294,531	2,951,095
Available	23,000	33,230	66,550
Avg. Age	1998.0	2000.4	1999.7
Rate	\$14.00-\$24.00	\$17.50-\$28.00	\$15.00-\$26.00

Source: Doreys/BAG

Office

The largest percentage of new office development at the three interchanges (71.5%) is located at Exit 108/109. The easy access on and off the interstate, available zoned, undeveloped property, and proximity to high-end residential development at Sugarloaf makes Exit 108/109 appealing as an office location. There is significant office development activity to the north of Exit 108 moving towards Exit 111. Currently, there is little office activity at Exit 115, but it will likely grow as the area matures. The recent success of Huntcrest and the announcements of additional office developments indicate additional growth in the office sector which could benefit both exits. Vacancies in the office inventory are modest at Exit 108/109 especially following recent announcements which may trigger additional development interest. Huntcrest has the competitive advantage of a large inventory of office space, which lessens the interest in major office development in Suwanee.

Exhibit 24: Office Land Uses

	Exit 111	Exit 108	Exit 115
Number of Centers	2	4	1
Total SF	505,594	1,206,263	50,000
Available	89,622	135,671	25,000
% Available	17.7	11.2	50.0
Avg. Age	2000	1999	2005
Rate	\$15.00-\$23.50	\$9.75-\$20.75	\$23.50

Source: Doreys/BAG

Hotel

Exit 111 is facing substantial competition from new hotels at both exits. While the study area is more established as a hotel location with 761 rooms, or 45.4% of the inventory at the three exits, much of the new development is occurring at the other two exits. Five of the six hotels at Exit 115 were built in the last five years. The 392 rooms in the hotels located at Exit 108 are on average 2 years old and represent some of the industry's most contemporary product types. All hotels have interior corridors and are well maintained. Abundant support services are available at these intersections, including restaurants and shopping, however, access is not as convenient as at Exit 111. In addition, Exit 108, as home of The Gwinnett Civic Center, is attracting hotel development interested in servicing the demand from this facility and adjacent office development.

Exhibit 25: Hotel Land Uses

	Open	Rooms
Exit 111		
Admiral Benbow	1968	120
Motel 6	1974	121
Fairfield	1998	79
Courtyard	1999	78
Comfort Inn	1968	79
Comfort Suites	2003	65
SunSuites	1997	127
Ramada Limited	1974	42
Red Roof Inn & Suites	1996	50
<i>Total</i>		723
Exit 108		
Holiday Inn Gwinnett Center	2004	143
Hilton Garden Inn	2001	122
Hampton Inn	2003	127
<i>Total</i>		392
Exit 115		
Hampton Inn Atlanta Mall of Georgia	2000	92
Wingate Inn Atlanta Buford	2001	94
Days Inn Buford	1987	40
Country Inn & Suites Buford @ Mall of Georgia	2002	77
Holiday Inn Express Hotel & Suites Mall of Georgia	2002	79
Springhill Suites Atlanta Buford Mall of Georgia	2001	96
<i>Total</i>		478

Source: Key Advisors

Summary

Exit 111 is facing significant competition from the rapid growth of Exits 108 and 115. Yet, as the character of the area around these exits begins to emerge, it is creating competitive opportunities in the study area.

Exit 108, with the Discover Mills and the Gwinnett Civic Center and Arena, has several strengths:

- It is located closer to more densely developed portion of Gwinnett and central areas of the region for commuting.
- There is considerable unused traffic capacity throughout the interchanges and Sugarloaf Parkway and adjacent roadways.
- There is a significant concentration of exclusive residential development at Sugarloaf, drawing both retail and office to the area.
- There is a great deal of investment in office properties in the area.
- New hotel development is drawn by the office development and the Gwinnett Civic Center as demand sources.

Exit 115, the location of The Mall of Georgia, also enjoys certain competitive advantages over the study area:

- It is an established, super-regional retail destination.



- The transportation infrastructure has significant additional capacity through the interchange and improvements on Buford Drive.
- New hotel development is drawn to the exit by the wide array of restaurants and other support services.

Based on an assessment of the adjacent exits, the study area has several competitive strengths that should be emphasized:

- The smaller scale of the interchange and absence of parallel access road gives properties at Exit 111 greater visibility and proximity from the interstate.
- Exit 111 has a smaller scale and is less intimidating with a different character than either Exit 108 or Exit 115 which can appeal to tourists and visitors.
- Exit 111 is still the preferred location for industrial development.
- Office development is moving northward from Exit 108 which will benefit the study area.
- Exit 111's hospitality sector is better positioned to compete with Exit 108 since its demand comes from a broader mix of sources - industrial, convention and tourist. It also has a broad range of services in place appealing to visitors.

The competitive position of the study area versus Exits 108 and 115 suggests the following development pattern:

- Appropriately Scaled Transportation Improvements - developed of a grid of arterials through the study area will improve access to the area at a time when all three areas will be increasingly congested. It will also provide access to these areas by means other than the interstate which will accelerate the potential merging of the three development areas into one, much like the distinctions between Buckhead, Midtown, and Downtown are disappearing as the areas grow together.
- A Place of Employment - The study area is well established as a place of employment, dominating the industrial sector. The addition of office development on key parcels would complement this important business-orientation of the exit and create a vertical development that would create identity for the area.
- A Convenient Place to Shop - retailing which is accessible, attractive and oriented to visitors and residents from surrounding residential areas should be the focus. This is where you grocery shop, use local services, go to Wal-Mart, and take your family to dinner. It also provides the services that visitors to hotels want. Extending the retail offerings to include home improvement, office supplies, and movies/entertainment would complement the present offerings without competing with the destination retail at the other exits.
- User-Friendly Place to Visit - Business travelers, highway travelers, other visitors find Exit 111 an accessible, easy to navigate place to stay when they need to be in the area. Restaurants report they draw customers from a wide area. Rather than

rely on one segment of demand, we can offer a broad mix of demand from business travelers, convention/meeting delegates, users of the Suwanee Sports Academy and area visitors. Making support services accessible and attractive to the hospitality properties is key.

Review of City Zoning and Development Policies

What is Currently Allowed?

Inside the study area, the predominant zoning reflects a range of existing commercial and industrial uses. On the east side of Lawrenceville-Suwanee Road north of I-85 and along Gwinco Boulevard and Lawrenceville-Suwanee Road south of the Interstate, properties are primarily zoned as one of three commercial districts: C2/General Commercial District (retail uses, including hotels/motels), C2-A/Special Commercial District – Alcoholic Beverage Sales (retail, including bars and restaurants that serve alcohol) and C3/Special Commercial District (retail, including package stores and adult entertainment facilities). All three are intended to provide commercial uses that are accessible to a significant portion of the local population.

Properties zoned M-1/Light Industrial reflect existing uses along Satellite Boulevard, Horizon Drive, and Old Peachtree Road east of Lawrenceville-Suwanee Road. This zoning accommodates less intensive industrial uses with good Interstate access and minimal impact on adjacent residential and commercial uses. Permitted uses include office parks, distribution facilities, warehouses, and wholesale facilities.

Other zoning classifications in the City provide for office, residential, and mixed-use opportunities. The residential zoning classifications accommodate detached single-family homes on minimum lot sizes of 12,000 square feet (in-fill housing) to 18,500 square feet (new subdivisions); duplexes; and multi-family dwellings with maximum densities of either six or eight units per acre. Residential uses are also permitted in mixed-use settings through the PMUD/Planned Mixed Use District, which allows up to eight units per acre in the Planned Mixed Use Village sub-district. In addition to Mixed Use Village, which is primarily residential, the City allows for predominantly non-residential configurations with its Mixed Use Center classification. A PMUD is intended to provide greater flexibility with respect to site design, land use mix, and density, while encouraging open space preservation, connectivity, and walkability.

Mixed Use Villages and Mixed Use Centers are identified throughout the City in “Character Areas” on the Future Land Use Map. According to the Land Use component of the Suwanee Town Master Plan, Character Areas are intended to “enhance development approaches and focus growth in patterns of traditional forms and relationships that will encourage a sense of community.” The City has identified six specific Character Areas that will reflect a mixture of uses and will be subject to specific design guidelines. Town Center is a Character Area that is in the process of a successful implementation, and it is designated as both Mixed Use Village and Mixed Use Center. The City has also adopted Architectural and Design Standards for all multi-family and non-residential zoning districts in order to promote quality design. The standards regulate key building elements, including exterior materials, color, roof pitches, and awnings.

In general, the study area has been zoned to permit additional commercial and industrial development at moderate densities that reflect historic development patterns



in the area. This is consistent with the on-going development of the study area as one of Suwanee's key commercial centers. (See Map 9: Zoning Map)

Future Land Uses

The City has identified six areas as being appropriate for future development as mixed-use Character Areas. Of these six, one is located in the study area: the Mainstreet/Lakeside Character Area, which is recommended as a Mixed Use Center. The site is 150 acres and encompasses the Falcons site ("Mainstreet") and the adjacent Motorola site to the north ("Lakeside"). The Motorola portion of the site is currently zoned M-1, and the Falcons property is zoned O-I (Office-Institutional), C2, and C3, with a very small portion fronting Burnette Road classified as R-100/ Residential Single Family District. The City's design guidelines for Mainstreet/Lakeside encourage high density office buildings with upper-story residential uses and ground-floor shops. Under this zoning designation, the City will permit:

- up to twenty dwelling units per acre,
- 20,000 square feet of floor area per acre for office uses,
- 12,000 square feet of floor area per acre for commercial uses.

Based on these figures, the site can accommodate substantial mixed-use development of office, commercial and residential uses, consistent with designation as a character area. Green space and community facilities are required to be interspersed among the prominent land uses.

The rest of the study area inside the City limits is classified as either Commercial/Retail or Industrial, which reflects existing uses and development patterns. Commercial development is proposed to be concentrated on the east side of Lawrenceville-Suwanee Road, on Gwinco Boulevard, and on Old Peachtree Road. Properties along Old Peachtree Road in the vicinity of the Horizon Drive intersection, however, are proposed for industrial uses. Industrial uses are also recommended for the remaining areas in the City that have been developed under industrial zoning: Along most of Satellite Boulevard on either side of Lawrenceville-Suwanee Road and on Horizon Drive. As such, the City's Future Land Use Plan contemplates a continuation of the development patterns that have already been established in the area while encouraging mixed use development on the Falcon/Motorola sites. The City's resulting vision for the study area is a moderate intensity commercial area combining a significant inventory of industrial and business park uses with retail development along the main roadways that intersect the area.

The portions of the study area in unincorporated Gwinnett County also largely reflect existing uses and trends, including the designation of Office/ Distribution/Technology along Horizon and Crestridge Drives, and Low Density Residential for the Bowen Subdivision site south of Crestridge Drive. It should be noted that Low Density Residential is also recommended for several properties opposite the proposed Bowen Subdivision site on Lawrenceville-Suwanee Road. Three of the properties are identified as development opportunities (see *Development Opportunities* map) due to their potential



for being assembled and redeveloped as non-residential uses. Their proximity to the City limits makes annexation a potential course of action that can allow the City to regulate the site's zoning and land use classifications. This annexation potential also exists for other properties adjacent to the City on the south side of the Interstate.

(See Map 10: Future Land Use Map)



Economic Impacts

This section of the report presents an assessment of the current economic impacts of the I-85 business district (the district). This section details the economic impacts resulting from business operations, employees and overnight visitors to the District. It is based on the best available current data, the inventory of major commercial projects in the study area, local tax and economic conditions and assumptions regarding fiscal conditions in the City of Suwanee and Gwinnett County.

Major Commercial Development within the Business District

Suwanee’s I-85 Business District already contains a large inventory of commercial development. As detailed in the preceding sections, there is a significant concentration of industrial and business park development already in the district, with a total of 5.9 million square feet. Retailing has been a growing component of the district with 532,496 square feet in-place and more planned or rumored on key development parcels. In addition, as noted earlier, the district is home to nine hotels with 761 rooms. In addition to these major projects the district contains many smaller, stand-alone business and retail establishments and well as some residential development.

Exhibit 26: I-85 Business District Major Non-Residential Projects

Land Use Category	Number of Projects	Estimated S.F./Rooms
Industrial	10	5,506,674 s.f.
Business Park/Office	5	505,594 s.f.
Retail	8	532,496 s.f.
Hotel	9	761 rooms

Source: BAG/Key

Economic Impact Methodology

To assess the overall economic impacts resulting from Suwanee’s I-85 Business District, two measures of economic impact are considered:

- **General economic benefit** – the impact on Suwanee from economic activity in the district. This includes the value of existing development, business operations, employment, payroll, etc.
- **Local public revenues** – the taxes and other public revenues generated in the District which will go to local governments—the City of Suwanee, Gwinnett County, and the Gwinnett County School Board. This is effectively the local government’s “cash-on cash” return from providing governmental services to the district. Since the I-85 Business District includes properties both in the City of Suwanee and in unincorporated Gwinnett, we have shown where these revenues would be realized from the District.

These two measures of economic impact were evaluated in terms of three distinct components of development:



- *Economic impacts due to operations*—the economic effects resulting from the ongoing operation of businesses in the district.
- *Economic impacts due to employees*—those economic effects resulting from expenditures by local employees working in the district.
- *Economic impacts due to visitors*—the economic effects from the expenditures of overnight visitors to hotels in the district.

Consideration of the economic impacts from these three components provides a comprehensive assessment of the economic impacts from the district.

Economic Impacts Due to Operations

General Economic Benefits--The greatest economic impact from the District comes from the on-going operations of the existing commercial development. As shown in the following exhibit, the District contains \$169,380,430 of assessed value. The largest percentage is in industrial/business park uses (64%) followed by commercial/retail development (25%). Approximately 55% of the valuation in the District is in the City of Suwanee and 45% is in unincorporated Gwinnett. Overall, the portion of the district’s valuation in the City of Suwanee is equivalent to 15% of the City’s total assessed valuation.

EXHIBIT 27: Assessed Values by Land Use Category I-85 Business Park / City of Suwanee

Land Use Categories	I-85 Business District						City of Suwanee	
	Total Value	%	In Suwanee	%	In County	%	Number	%
Industrial/Office	\$107,677,520	64%	\$ 47,826,560	44%	\$59,850,960	56%	\$ 104,235,880	17%
Commercial/Retail	\$ 42,392,394	25%	\$ 36,258,354	86%	\$ 6,134,040	14%	\$ 209,891,230	33%
Hotel*	\$ 8,340,576	5%	\$ 8,340,576	100%	\$ -	0%	N/A	
Residential	\$ 10,970,240	6%	\$ -	0%	\$10,970,240	100%	\$ 258,971,880	41%
Other	\$ -						\$ 55,869,507	9%
Subtotal	\$169,380,730	100%	\$ 92,425,490	55%	\$76,955,240	45%	\$ 628,968,497	100%

* Hotel valuations are included in commercial valuations for City of Suwanee

Source: City of Suwanee/Georgia Department of Revenue/BAG

As shown in exhibit 28, a total of 5,815 employees work in the district, with the largest number working in retail (2,348). Services other than hotels, account for the next largest number of employees (1,656), followed by warehousing/manufacturing (1,090) and finance, insurance and real estate (224). Hotels account for 140 jobs in the district. An additional 370 employees work in construction, utilities and all other employment categories combined. Collectively, the employees in the district generate an annual payroll of \$199 million.

An additional general economic benefit includes \$34 million in annual operating expenses incurred by businesses in the district. In addition, there is \$129 million in annual retail sales from businesses in the district.



EXHIBIT 28: Annual Economic Impacts of I-85 Business District

Employment		
<i>Retail--estimated employment</i>		2,348
Estimated annual employee salary	\$	26,500
Estimated payroll	\$	62,222,000
<i>Finance, Insurance, Real Estate--employment</i>		224
Estimated annual employee salary	\$	44,616
Estimated IBO payroll	\$	8,512,000
<i>Services other than Hotels--employment</i>		1,656
Estimated service employee salary	\$	38,116
Estimated service payroll	\$	63,120,096
<i>Hotels--employment</i>		140
Estimated hotel employee salary	\$	13,000
Estimated hotel payroll	\$	1,820,000
<i>Warehousing/Manufacturing--employment</i>		1,090
Estimated warehousing/manufacturing employee salary	\$	44,160
Estimated warehousing/manufacturing employment payroll	\$	48,134,400
<i>Other employment--employment</i>		357
Estimated employee salary	\$	43,160
Estimated other employment payroll	\$	15,408,120
<i>Estimated total employees</i>		5,815
Estimated total payroll	\$	199,216,616
General Economic Benefits		
<i>Operating Expenses</i>		
Retail @\$5 per square foot	\$	2,652,480
IBO @ \$5 per square foot	\$	29,979,370
Hotel @ \$2,000/room	\$	1,522,000
Estimated Operating Expenses	\$	34,153,850
<i>Estimated Retail Sales</i>		
Retail square footage		532,496
Average sales per square foot	\$	244
Annual retail sales	\$	129,929,024
Local Public Revenues		
<i>Property Taxes</i>	<i>City of Suwanee</i>	<i>Unincorp. Gwinnett</i>
Assessed value of development in Suwanee	\$ 92,425,490	
Assessed value of development in Unincorporated Gwinnett		\$ 76,955,240
Potential Property Taxes (2004)		
City of Suwanee (.00581)	\$ 536,992	\$ -
Gwinnett Schools (.02030)	\$ 1,876,237	\$ 1,562,191
County and other: (.01172)	\$ 1,083,227	\$ 901,915
<i>subtotal property taxes by jurisdiction</i>	\$ 3,496,456	\$ 2,464,107
<i>subtotal property taxes by I-85 Business District</i>		\$ 5,960,563
<i>Local sales tax revenue (2%)*</i>	<i>City of Suwanee</i>	<i>Unincorp. Gwinnett</i>
Estimated annual retail sales	\$ 114,337,541	\$ 15,591,483
Local sales tax revenue (1%)	\$ 1,143,375	155,914.83
Gwinnett Public Schools SPLOST (1%)	\$ 1,143,375	155,914.83
<i>subtotal local sales taxes by jurisdiction</i>	\$ 2,286,751	\$ 311,830
<i>subtotal local sales taxes by I-85 Business District</i>		\$ 2,598,580
Economic Impacts Due to Operations		
<i>General Economic Benefit</i>	\$	532,680,220
<i>Total Local Public Revenues</i>	\$	8,559,144
<i>Local Public Revenues City of Suwanee</i>	\$	1,680,368

Source: Bleakly Advisory Group



Local Public Revenues^{*}--The City of Suwanee, Gwinnett County and the Gwinnett School Board receive substantial tax revenues from the district. The portion of the District within the City of Suwanee generates \$3.5 million in annual property taxes to the City, County and School Board. The portion of the district in unincorporated Gwinnett generates \$2.5 million in property taxes to the County and School Board. In terms of local sales tax revenues, retail businesses in the Suwanee portion of the district generate \$1.1 million in local option sales tax and \$1.1 million in school SPLOST funds annually. The unincorporated portion of the district generates another \$311,830 in local sales taxes annually.

Economic Impacts of Employee Spending

General Economic Benefits--The salaries paid to employees who work in the district have a significant impact on the Suwanee's economy. As shown in the following exhibit, approximately 14% of the people who work in the City of Suwanee live there as well. Thus, we estimate that approximately 14% of the payroll generated in the district goes to Suwanee residents. Based upon an analysis of retail spending patterns, it is estimated that this payroll generates \$11.4 million in new retail expenditures from Suwanee residents who work in the district. This level of retail spending by Suwanee residents is sufficient to support 45,740 square feet of retail space—equivalent to a neighborhood shopping center--based on an average retail sales of \$250 per square foot.

Exhibit 29: Economic Impact from Employees I-85 Business District	
Employees	
Total Employees	5,815
Annual Total Payroll	\$ 199,216,616
General Economic Benefit	
Annual payroll of employees living in Suwanee (14%)	\$ 27,890,326
Employee retail expenditures	\$ 81,678,813
Retail expenditures by employees living in county (14%)	\$ 11,435,034
Retail square footage supported by employee spending in county	45,740
Local Public Revenues	
Local sales taxes from employee spending (1%)	\$ 114,350
Gwinnett Public Schools SPLOST	\$ 114,350
subtotal	\$ 228,701
Economic Impacts Due to Employees	
General economic benefit	\$ 27,890,326
Local public revenues	\$ 228,701

Sources: Bleakly Advisory Group, Claritas, GA Department of Labor, ULI

Local Public Revenues-- we estimate retail spending by employees of the district who reside in the Suwanee will generate \$228,701 in additional local sales taxes annually.

* The Local Option Sales Tax has been included in this Exhibit as a local revenue to Suwanee even though it is collected by Gwinnett County because Suwanee's future allocation of these funds can be influenced by its comparative level of contribution in negotiation with the County.

Economic Impacts of Visitors

General Economic Benefits – As indicated in the following exhibit, the overnight visitors staying in hotels in the district generate a substantial economic impact to the area. Based on the analysis of occupancies in the nine hotels presented earlier, we estimate there will be 144,493 room nights of demand in the district in 2005. We estimate that an overnight visitor spends approximately \$97 per day while staying in the district for lodging, meals, retailing and incidentals. This is consistent with average visitor expenditure rates used by the Gwinnett Convention and Visitors Bureau, net of transportation costs. Based on this average daily expenditure level, we estimate overnight visitors spend \$14 million per year in the district.

Local Public Revenues – The spending by overnight visitors will generate additional public revenues for the City of Suwanee and Gwinnett County from the hotel/motel tax and local sales taxes. During 2004 the City of Suwanee received \$319,832 in hotel/motel taxes and we estimated an additional \$144,493 will be generated in local sales taxes from visitor expenditures in the district other than lodging.

Summary of Economic Impacts

As shown in the final exhibit, the entire district is having a substantial economic impact.

Exhibit 30: Current Economic Impact of I-85 Business District

GENERAL ECONOMIC BENEFITS		
<i>I. Operations</i>		
Current assessed value	District Total	
	\$ 169,380,730	
Annual operating expenses	\$ 34,153,850	
Annual Payroll	\$ 199,216,616	
Annual retail sales	\$ 129,929,024	
<i>II. Employees (all sectors)</i>		
Number of Employees	5,815	
Annual payroll of employees living in County (14%)	\$ 27,890,326	
Annual retail expenditures/employees living in Suwanee	\$ 11,435,034	
<i>III. Visitors</i>		
Estimated overnight visitors	144,493	
Estimated overnight visitor per diem expenditures	\$ 14,015,777	
Subtotal: General Economic Benefits	\$ 558,131,031	
LOCAL PUBLIC REVENUES		
	District Total	City of Suwanee
<i>I. Operations</i>		
Annual property taxes (City/County/Schools)	\$ 5,960,563	
City of Suwanee Property Taxes	\$ -	\$ 536,992
Local Sales Tax (1%)	\$ 2,598,580	
<i>II. Employees</i>		
Local sales taxes from employees living in Suwanee	\$ 228,701	
<i>III. Visitors</i>		
Local sales taxes from visitors	\$ 144,493	
Hotel/motel tax	\$ 319,832	\$ 319,832
Subtotal: Local Public Revenues	\$ 9,252,169	
Subtotal: Local Public Revenues City of Suwanee		\$ 856,824

Source: Bleakly Advisory Group



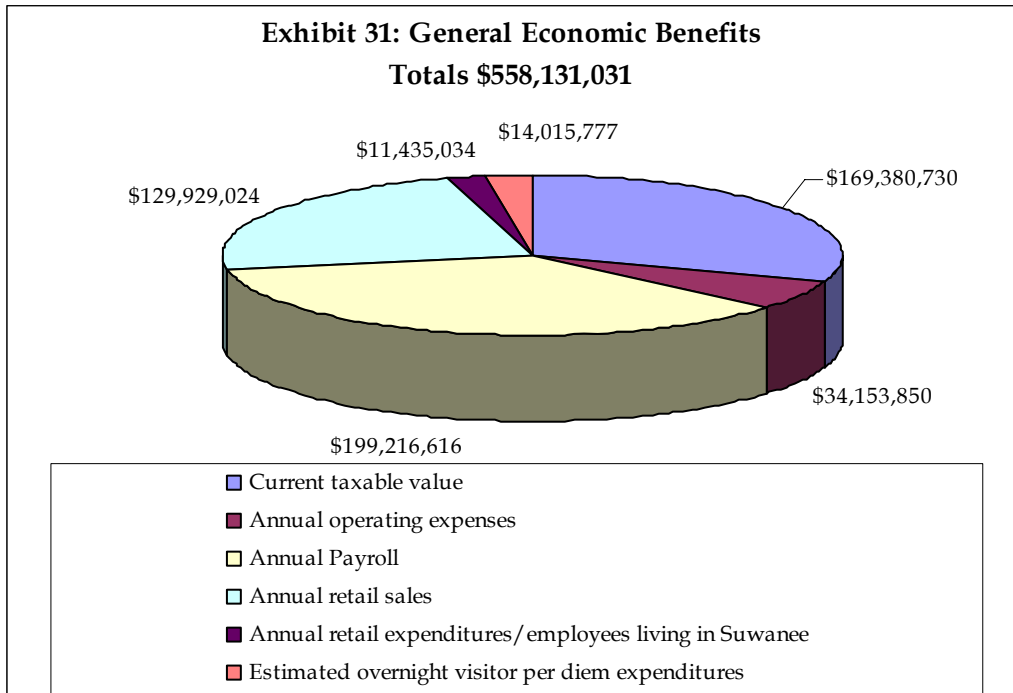
General Economic Benefits—Suwanee’s I-85 Business District includes \$169 million in real estate assessed valuation, and is equivalent to 15% of the City’s assessed value. Businesses in the district spend approximately \$34 million annually on the operation of their facilities. Annual sales of retail outlets total \$129 million. An estimated 5,815 employees work in the district with an overall payroll of \$199 million. Employees who work in the district and live in Suwanee generate a payroll of approximately \$27.9 million and spend approximately \$11.4 million annually on retail purchases. Thus, the general economic benefit to the City of Suwanee from the I-85 Business District is approximately \$588 million annually.

Local Public Revenues—The I-85 District generates substantial public revenues for the City of Suwanee, Gwinnett County and the Gwinnett School Board. Property taxes on current development in the District generate \$5.9 million annually, with \$536,992 going to the City of Suwanee. Local sales taxes from the district are \$2.5 million annually. Employees who work in the district and live in Suwanee generate an additional \$228,701 in local sales taxes through their retail expenditures. Overnight visitors to the district generate an additional \$453,000 in sales and hotel/motel taxes annually.

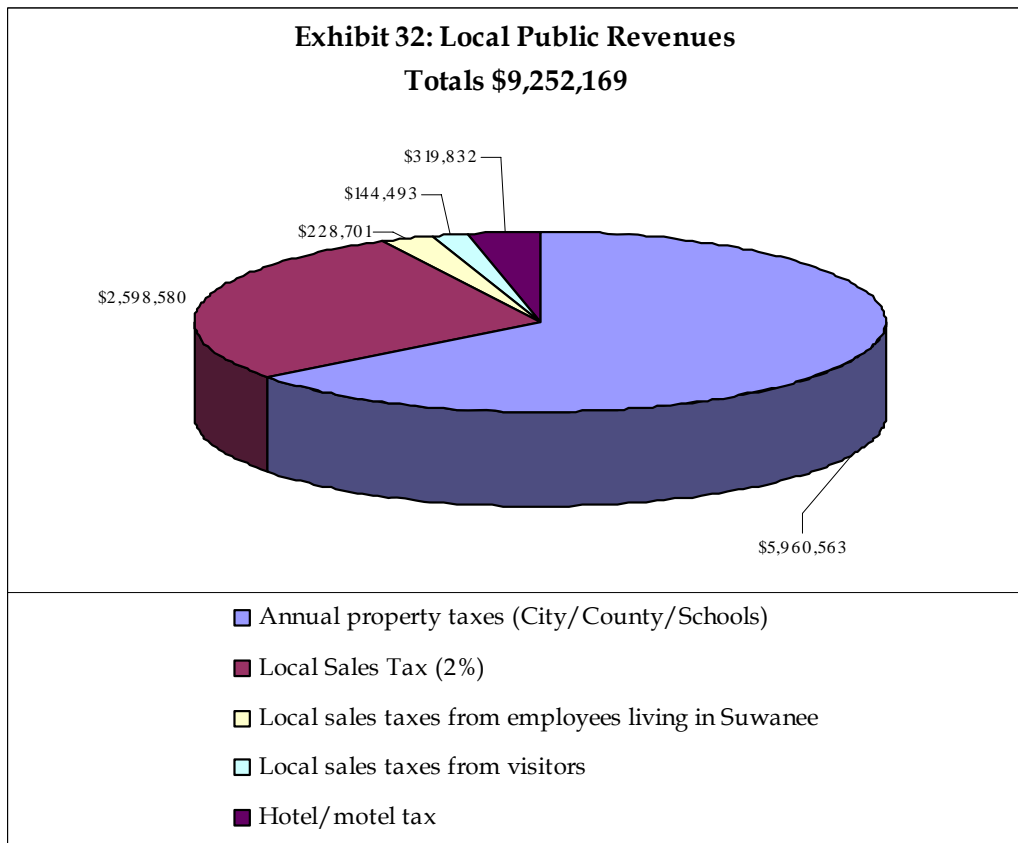
The City of Suwanee receives \$536,992 in property taxes from the District and \$319,872 in hotel / motel tax receipts for a total of \$856,824 annually. In summary, the key economic impacts to the City of Suwanee from the I-85 Business District include:

- ***\$169 million in property market valuation***
- ***5,815 permanent jobs***
- ***\$199 million in annual payroll***
- ***\$130 million in retail sales***
- ***\$34 million in spending for business operations***
- ***\$558 million in general economic benefit***
- ***\$9,252,169 in property and sales taxes***





Source: BAG



Source: BAG



Competitive Assessment Conclusions

At the conclusion of collection of the primary research presented in the preceding sections the consulting team collectively compared insights and observations about the I-85 Business District. Presented below is an assessment of the district in terms of its perceived strengths and weaknesses, emerging opportunities and possible threats to its future development. This assessment will serve as the baseline for creating a development strategy in Part II of this report.

Strengths: What are the characteristics of Suwanee in general and the district in particular which provide the building blocks for the future development of the area? Six have emerged from the research:

1. *Suwanee is enjoying a pattern of success*—The creation of Suwanee’s new downtown and surrounding development is creating a positive impression about Suwanee in the development community. This can provide important momentum to make improvements to the district.
2. *Single family demand is strong and growing*—Suwanee and the surrounding area are experiencing a residential boom, with new housing developments occurring throughout Suwanee and in the surrounding areas. The pressure for additional residential growth is occurring within the study area, with the planned Bowen subdivision on Lawrenceville Suwanee Road and proposed multifamily and townhouse projects at several sites within the study area. The strong single family demand creates demand for additional residential growth, and the higher-end housing creates demand for office development. Typically, the creation of substantial amounts of executive housing attracts office development and this could provide the demand for more office development in Suwanee. In addition, given the strong residential demand, the City’s role can be to channel and mold the direction of residential development, allowing the City to be selective about the types of development it encourages.
3. *Suwanee in general and the district in particular, are in the “Sweet Spot” of the I-85 corridor*—The strategic location of Suwanee and Exit 111 in particular is bracketed by the emerging commercial cores at Exits 108/109 and Exit 115. The dynamic nature of the growth of these two areas, coupled with being the first exit after the merger of I-85/I-985 presents Suwanee with an opportunity to create a unique district that can capitalize on the strong growth trends afforded by this location. Office expansions at Huntcrest and adjacent properties provide models for the district’s growth.
4. *Exit 111 already exists*—so many communities undergoing rapid growth, lack direct access to an interstate. Suwanee has a functioning interchange in place, which can accelerate the pace of future development of the adjacent areas.
5. *Suwanee’s strong demographics*—The study area and Suwanee share very strong demographics, generally significantly higher than Gwinnett averages, which



- assures the appeal of the area for additional residential growth as well as retailing and potentially office development serving the executive housing.
6. *There are several major land parcels ready to develop*—Several large land parcels at critical locations in the study area remain undeveloped. In an earlier section we identified 17 potential development sites representing a combined 415 acres ready for development. These sites provide the opportunity to create a new, more dynamic character the district.
 7. *McGinnis Ferry Extension will improve access and ease traffic congestion.*

Weaknesses: What are the weaknesses of the district that might limit its development/redevelopment potential?

1. *The window of opportunity to alter the district's development character is rapidly closing*—the remaining major parcels are being developed without a clear plan to guide development in the area. Before long, opportunities for major developments will be gone as the remaining key sites are developed, making it harder to take the area in a new development direction.
2. *Strong demand is creating immediate development pressures on remaining sites*—As the city contemplates the future of the district, the strong retail and residential demand is creating pressure to develop the remaining sites in the district for these uses. This may result in developments which have a short shelf-life and within a few years will be vacant or in need of redevelopment.
3. *The district's transportation network is outdated and congested*—Exit 111 reflects its legacy as a development interchange during the early growth of the Suwanee. The interchange and the surrounding road network were not designed to accommodate the higher levels of traffic associated with the more intense commercial development which is occurring in the area. Traffic from employees and suppliers of the industrial and warehouse developments, resident commuting to job centers, and shopping trips to the emerging retail concentrations, combine with trips from visitors to the area's hotels and restaurants. The collective effect of all this demand is to overwhelm the limited and highly concentrated street network, with especially severe congestion on Lawrenceville-Suwanee Road. Allowing this congestion to continue and worsen will have severe negative economic consequences for the future of the district.
4. *The existing developments at the four critical corners nearest Exit 111 are ugly, dated and unappealing*—As a result of the continued evolution of the Exit 111 interchange, the four most prominent corners are ugly, vacant and unappealing. The first impression on visitors is negative and does not reflect the quality of more recent development that is occurring the district. *A closed BP gas station, an adult video store, a vacant motel and a Waffle House restaurant sitting in a sea of parking provide a mixed impression of the district and no sense of the appealing Suwanee community which lies beyond.*

5. *The Hotel Sector is losing to its competition*—The newest properties are attracting commercial demand and competing effectively with properties at adjacent interchanges. At the same time, the older properties are experiencing declining occupancies, allowing more shifting to weekly rentals and facing higher levels of criminal activity. The combination of these factors is creating a very mixed picture about the status of the lodging sector in the district, and allowing demand to move to adjacent exits.
6. *The district lacks a well defined image or focus among local residents and regional travelers*—Exit 115 is “Mall of Georgia”. Exit 108/109 is “Discover Mills” or “Gwinnett Civic Center”, Exit 111 lacks a positive, forward-looking common identity.
7. *There is no existing example of a “next generation” development to build upon in the district*—While models for what the district could become are present in the surrounding area, (i.e., Huntcrest) there are no similar development models in the district. This makes the task of creating a new development pattern for the future of the area harder to visualize.

Opportunities: Looking at the District and its surrounding market, what are the opportunities in the future for growth and development?

1. *There is plenty of growth in the region to capture*—Suwanee and the surrounding I-85 corridor are likely to experience strong growth over the next decade, at a minimum, the district needs to aggressively position itself to capture its fair share of this demand.
2. *Completion of a grid of thoroughfares serving the area*—The creation of the McGinnis Ferry overpass at I-85 and a second overpass at Smithtown Road would create a grid of thoroughfares connecting Satellite Boulevard and Old Peachtree/Horizon, providing greater travel options than the current system which funnels most traffic onto Lawrenceville-Suwanee Road. This will open up access to the entire study area and should enhance its development potential.
3. *Office uses are growing in the area*—Recent announcements of corporate locations at Huntcrest and new developments north and west of the district provide evidence of the growing appeal of the area as an office location. Proximity to executive housing at Sugarloaf and River Club could be driving this resurgence of interest in office uses within the context of an overall soft regional office market.
4. *Experienced developers are interested in the area*—Major property owners are seeing interest from major regional developers in their sites for commercial and mixed use development. The development community is familiar with Suwanee and the Northwest I-85 Corridor, and is a key resource for future development. However, they are waiting to see what the City is going to propose as the future direction for the area.

5. *Exits 108/09, 111 and 115 will increasingly become interconnected*—As the I-85 corridor continues to grow and as roadway improvements provide connectivity between the interchanges by using thoroughfares and access roads paralleling the Interstate, the development patterns within the three areas will increasingly converge. This presents both an opportunity and challenge for Suwanee. The opportunity is to capture its fair share of development occurring the area, the challenge is create its own identity so it is not overwhelmed by the investment occurring around the other major interchanges.
6. *Exit 111 has a different character from Exits 108 and 115*—Suwanee’s gateway is at a more modest scale and manageable, without the broad expanse of lanes and access roads that characterize Exit 108/109 and the deep set-backs of the development at Exit 115. The opportunity is finding ways to maintain this more welcoming scale while making the improvements to the interchange that make it even more appealing to residents business and travelers.

Threats: While opportunities abound for the District, it must deal creatively and realistically with a number of threats to its future which currently exist.

1. *Negative First Impressions*—The current exit presents a very poor image for Suwanee and the district. The comparison with the adjacent interchanges is particularly unappealing. Competing successfully for future growth will depend on making a better first impression.
2. *Continuing intense development competition from Exit 108/109 and Exit 115*—Currently, the development momentum is clearly in favor of these two exits. They have both attracted dominant retail anchors (Mall of Georgia and Discover Mills) have an increasingly diversified, mixed-use character, and are on the radar screen of major regional developers due to the recent heavy round of new investment. The District needs to define a future that allows it to compete with these two economic powerhouses.
3. *Additional deterioration in the hotels could lead to increased crime, creating a negative impression of the District*—The transition of the hotel sector needs to be more effectively managed so that it does not result in a perception of increasing crime and lack of safety for retail shoppers and overnight visitors to the area. Perceptions are reality when dealing with the fear of crime, and it can have a chilling impact on all the positive trends in the area if not managed effectively.
4. *Increased congestion will strangle development options*—as with crime, the perception that congestion is severe can limit future development. The Holcomb Bridge Road corridor in Roswell is experiencing this problem, with the result that new retailers and businesses are reluctant to locate in the area. Getting the grid of thoroughfares in place as quickly as possible is the best method for lessening the congestion on Lawrenceville-Suwanee Road to a manageable level, thereby removing this impediment to the next generation of development in the District.

5. *Some properties are being “sold-short”* – For example, a mini-warehouse facility was recently constructed on commercial property that likely has greater long-term potential.

Maps

Context Map

Study Area

Industrial Projects at Exit 111

Retail Projects at Exit 111

Office Projects at Exit 111

Transportation Network: Context

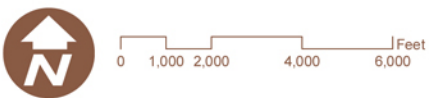
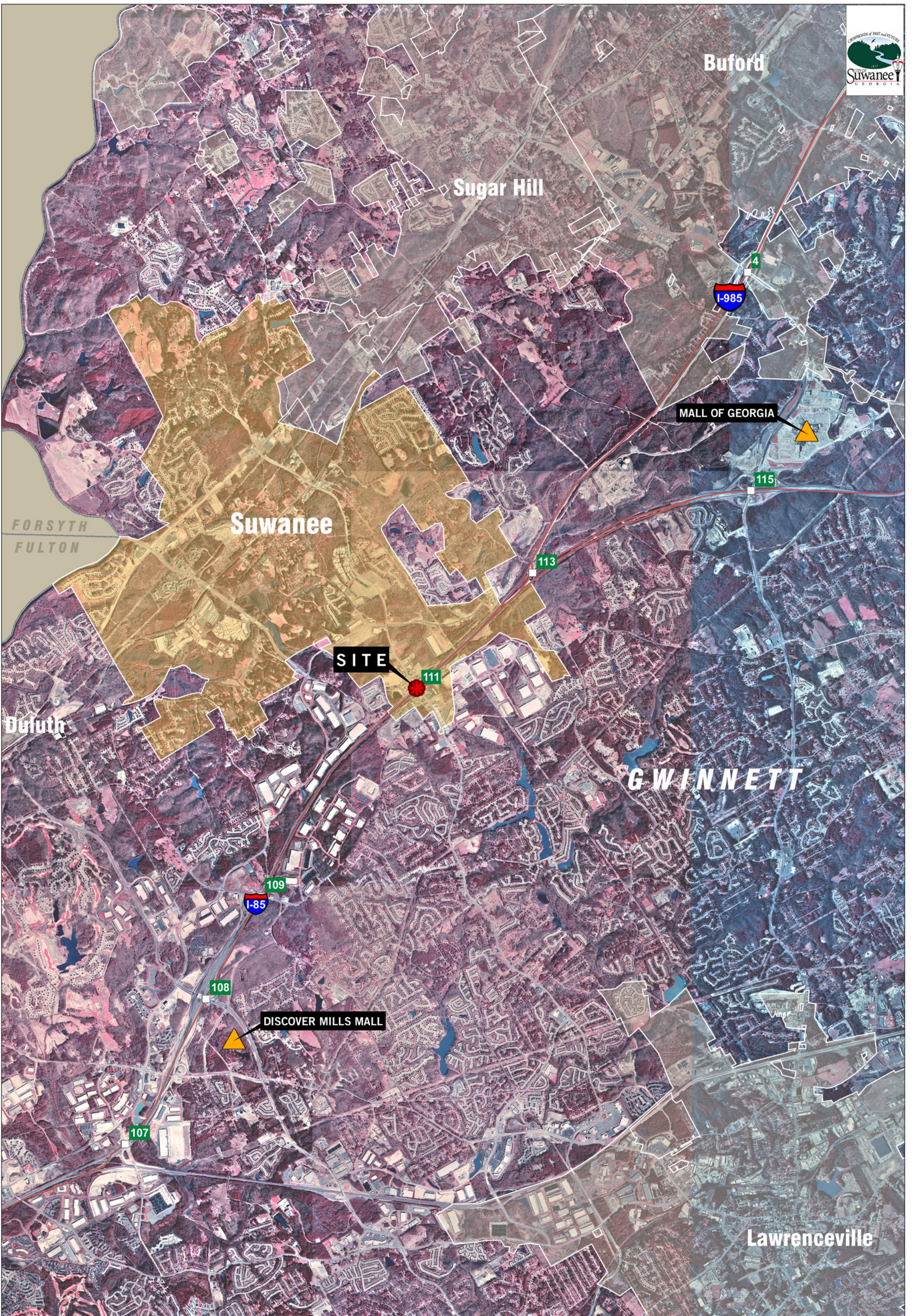
The Transportation Grid

Development Opportunities

Zoning Map

Future Land Use Map

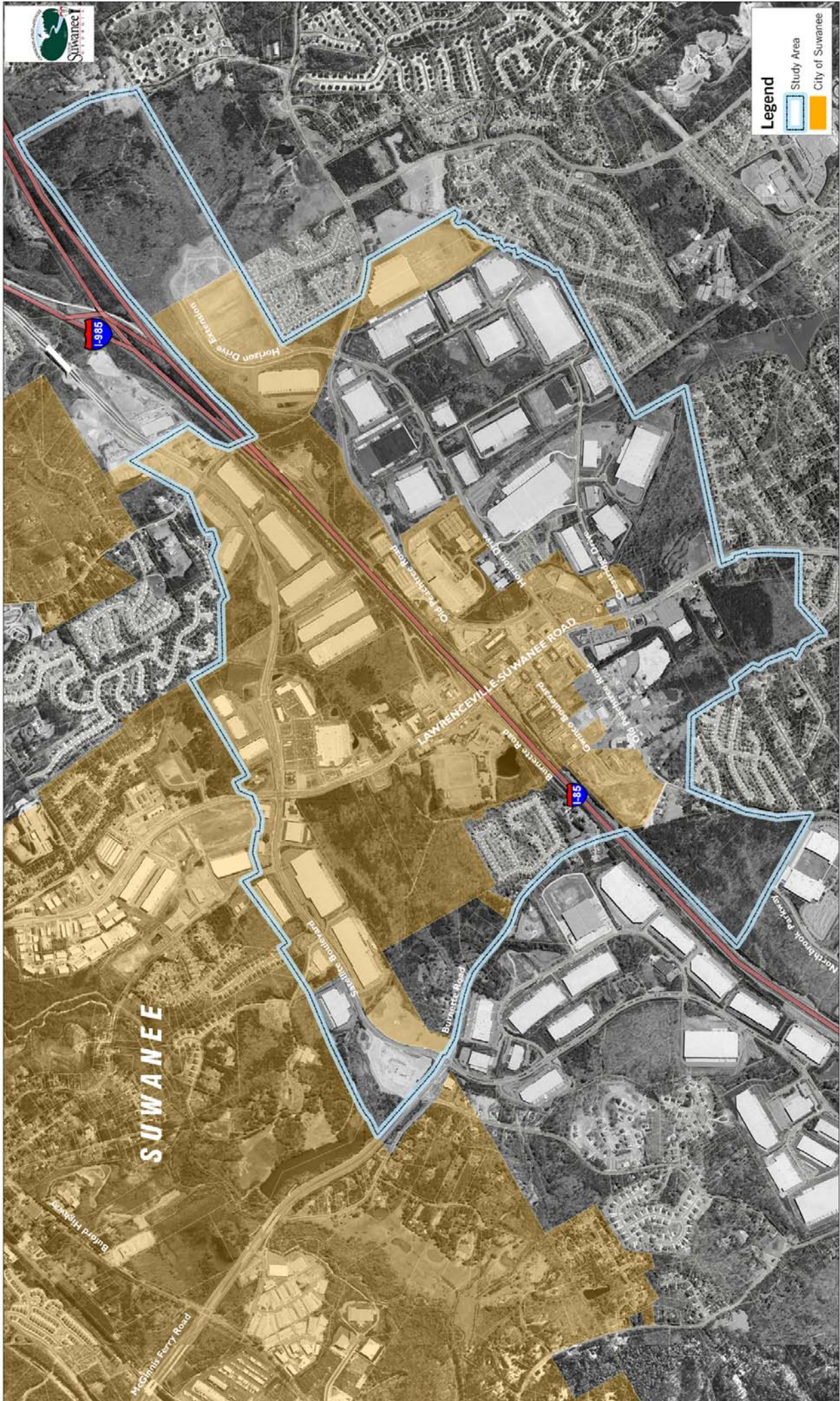
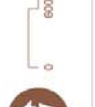
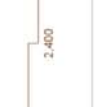
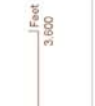
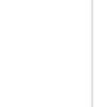
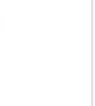
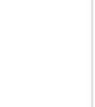
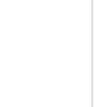




CONTEXT MAP

I-85 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY





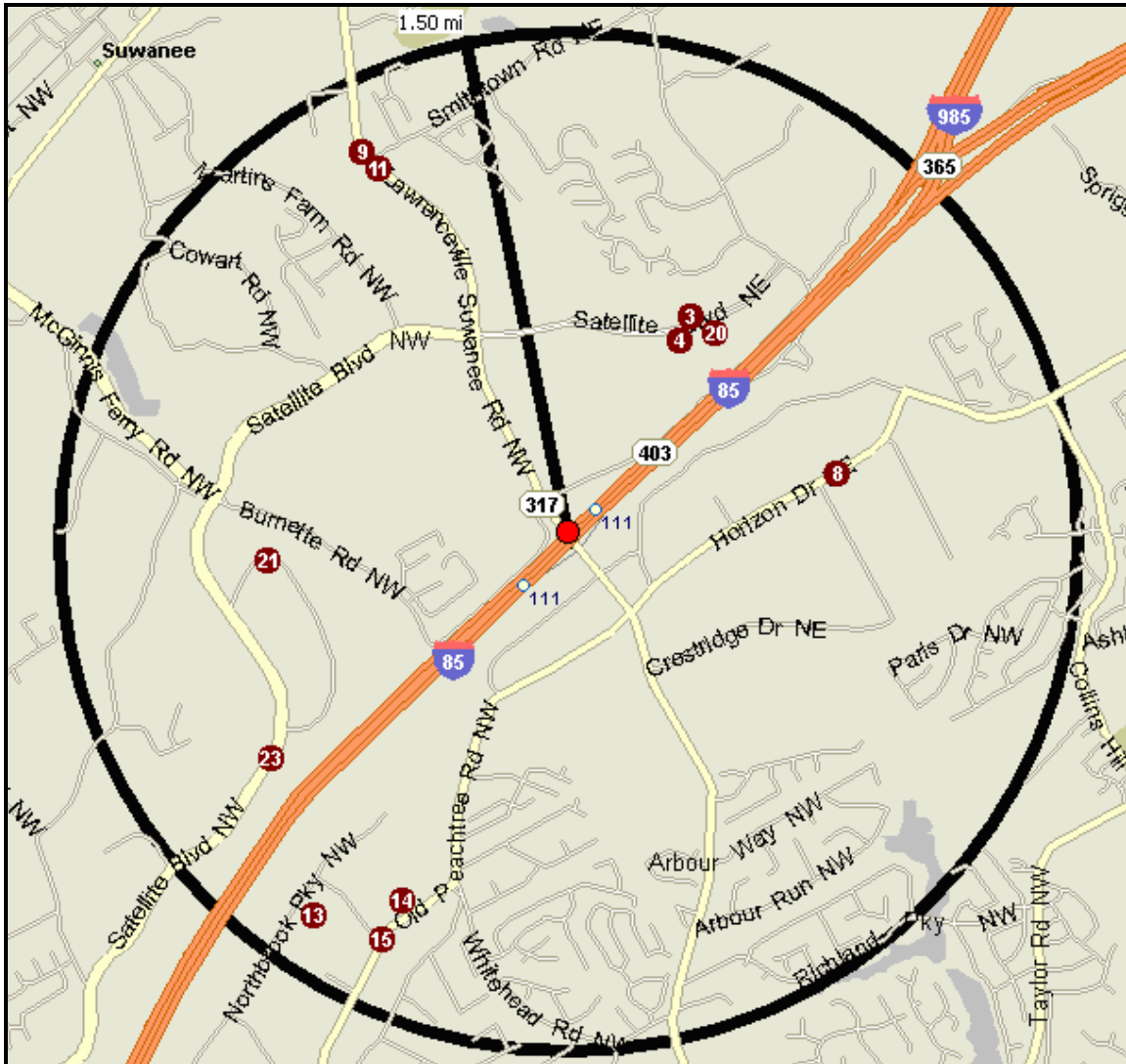
Legend
Study Area
City of Suwannee

STUDY AREA

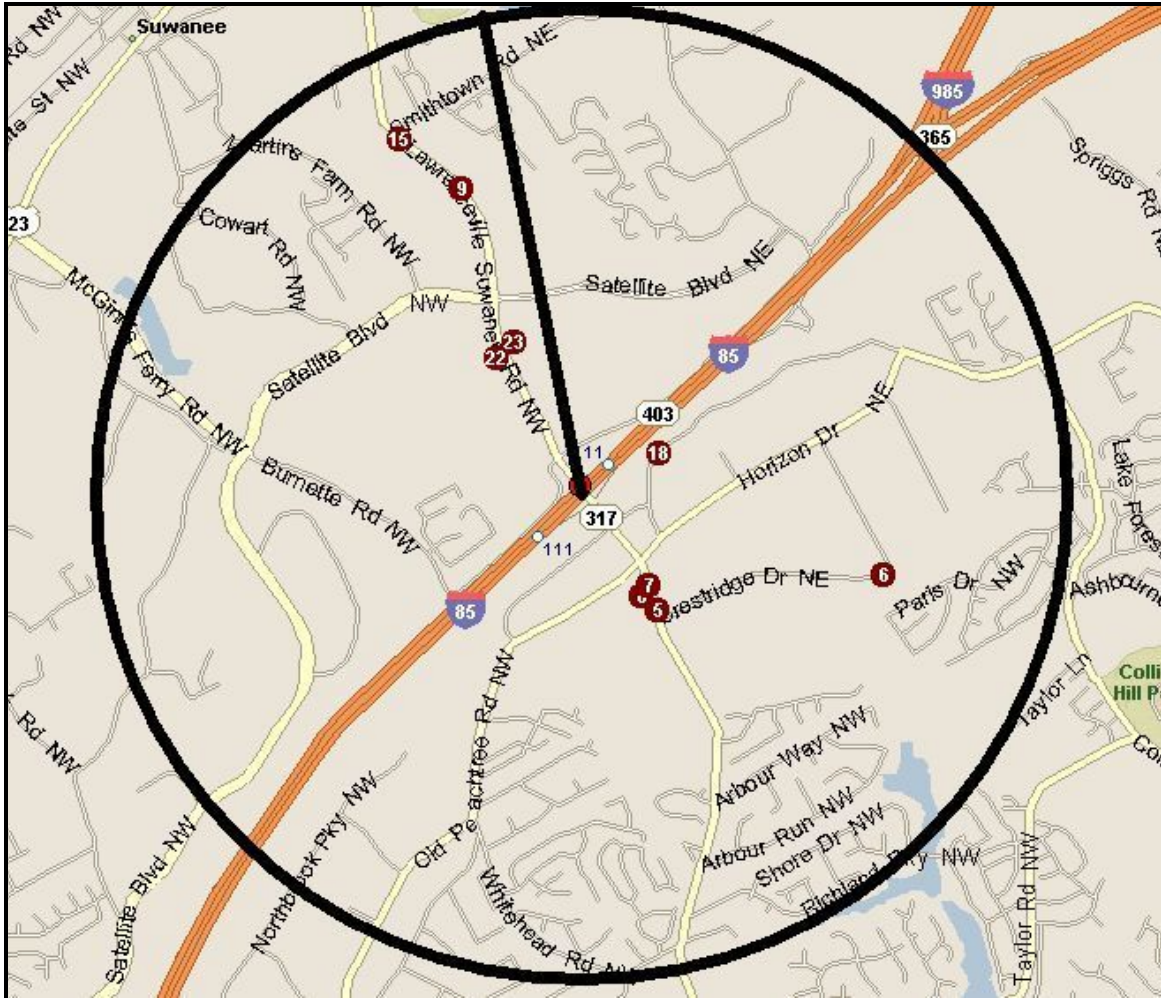
185 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY



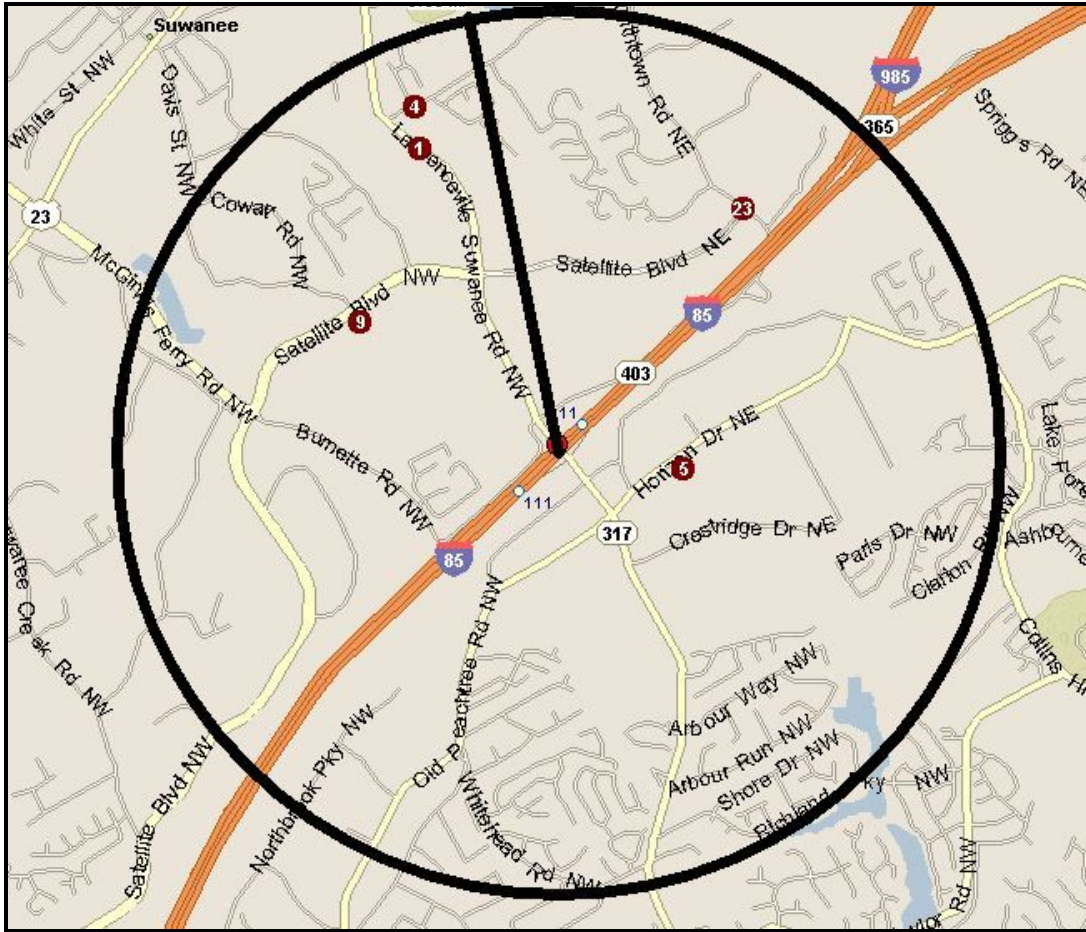
Industrial Projects at Exit 111

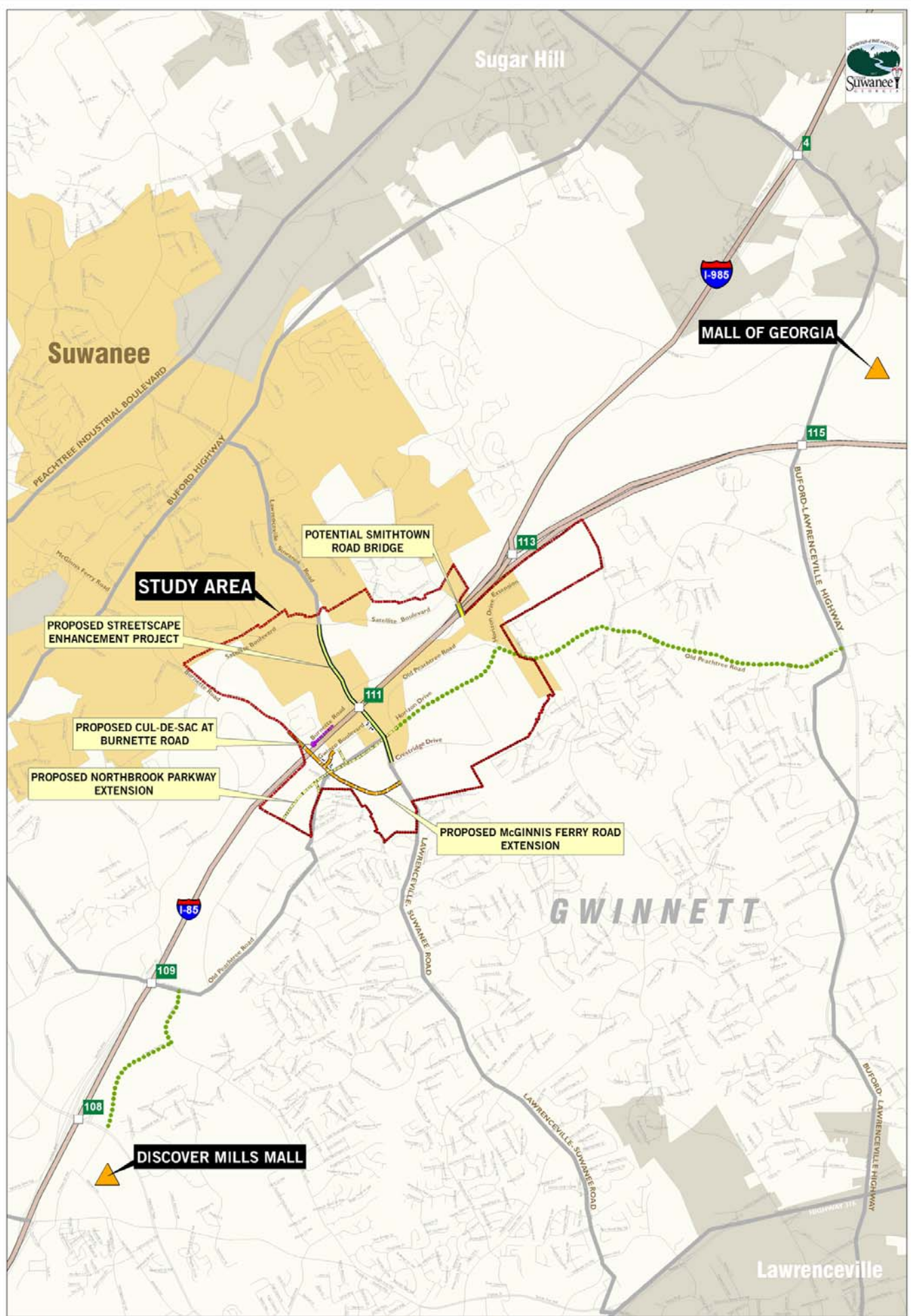


Retail Projects at Exit 111



Office Projects at Exit 111





STUDY AREA

PROPOSED STREETScape ENHANCEMENT PROJECT

PROPOSED CUL-DE-SAC AT BURNETTE ROAD

PROPOSED NORTHBROOK PARKWAY EXTENSION

POTENTIAL SMITHTOWN ROAD BRIDGE

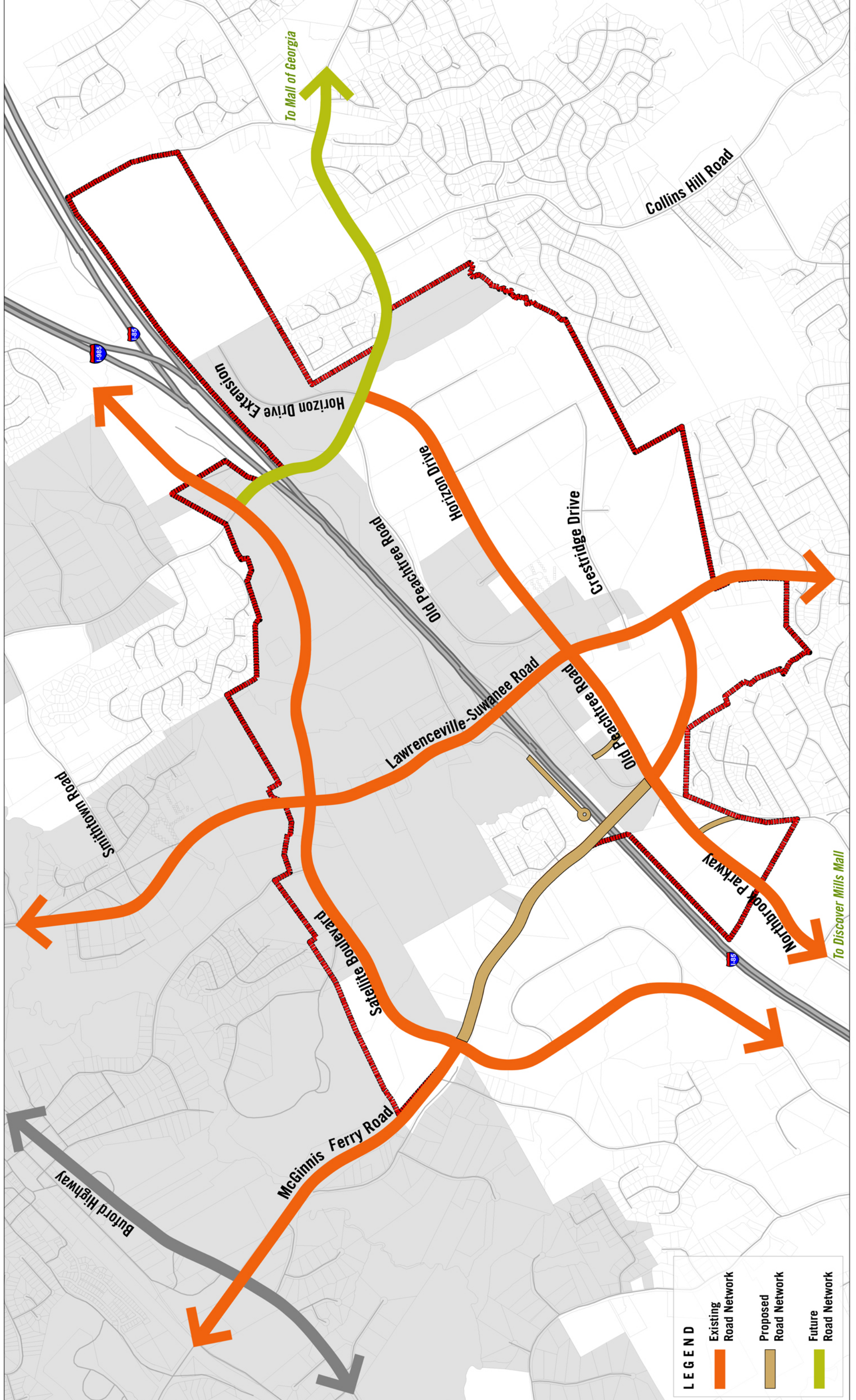
PROPOSED MCGINNIS FERRY ROAD EXTENSION

DISCOVER MILLS MALL

MALL OF GEORGIA

TRANSPORTATION NETWORK: CONTEXT





LEGEND

- Existing Road Network
- Proposed Road Network
- Future Road Network



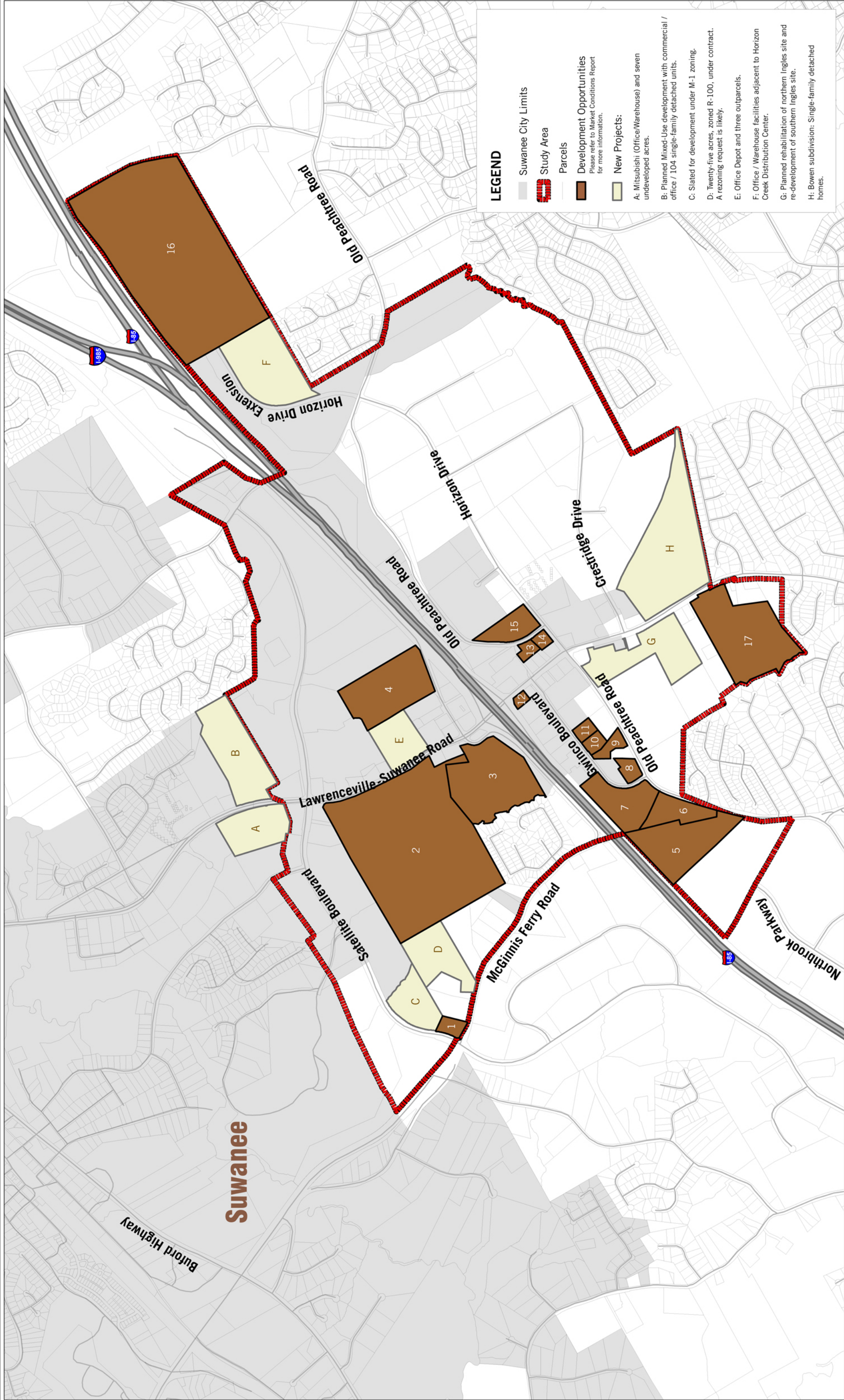
THE TRANSPORTATION GRID

I-85 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY



Key Advisors
Hospitality Consulting
PBS&J
September 2025

Bleakly Advisory Group



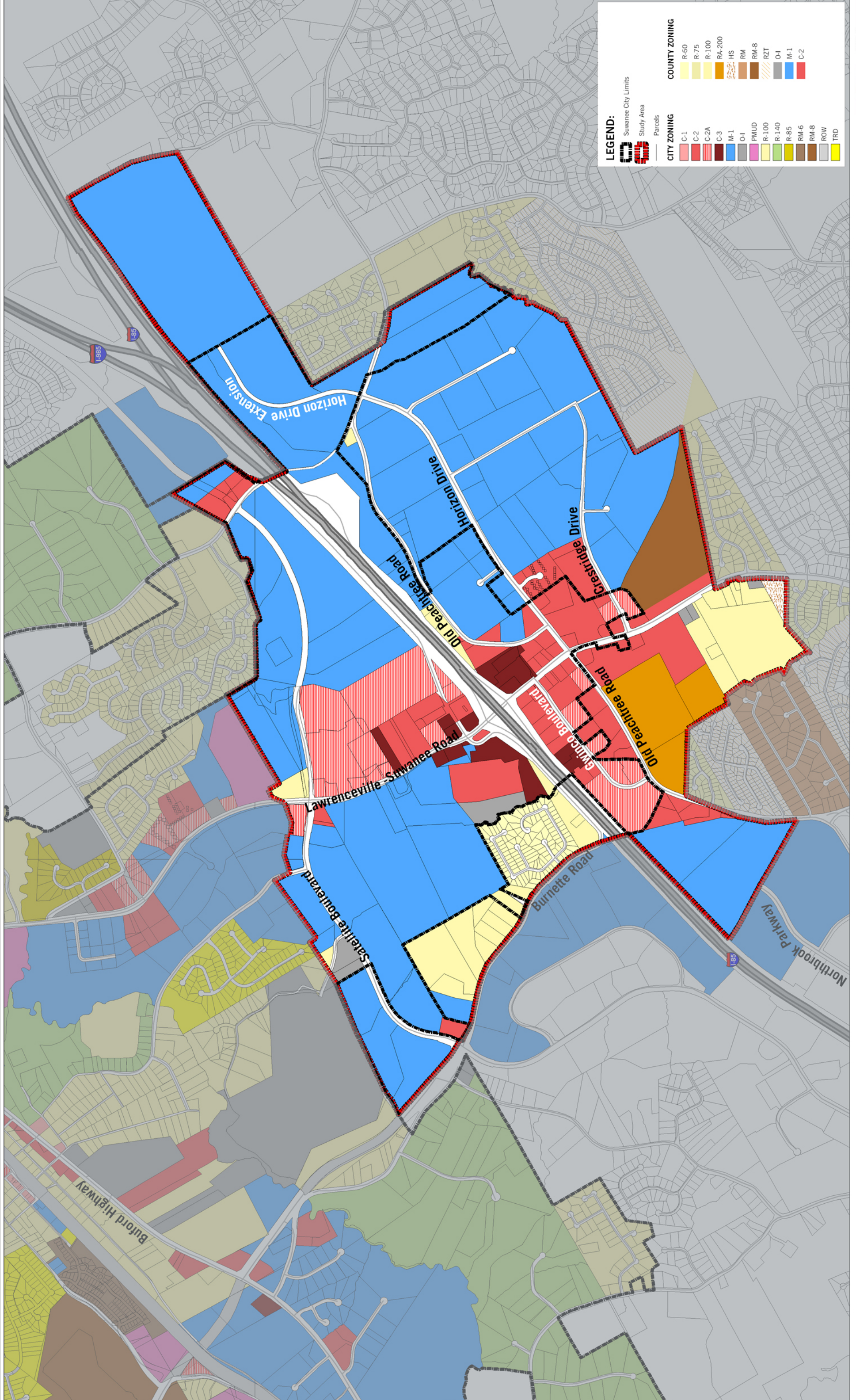
LEGEND

- Suwanee City Limits
- Study Area
- Parcels
- Development Opportunities
Please refer to Market Conditions Report for more information.
- New Projects:
- A: Mitsubishi (Office/Warehouse) and seven undeveloped acres.
- B: Planned Mixed-Use development with commercial / office / 104 single-family detached units.
- C: Slated for development under M-1 zoning.
- D: Twenty-five acres, zoned R-100, under contract. A rezoning request is likely.
- E: Office Depot and three outparcels.
- F: Office / Warehouse facilities adjacent to Horizon Creek Distribution Center.
- G: Planned rehabilitation of northern Ingles site and re-development of southern Ingles site.
- H: Bowen subdivision: Single-family detached homes.



DEVELOPMENT OPPORTUNITIES

I-85 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY



LEGEND:

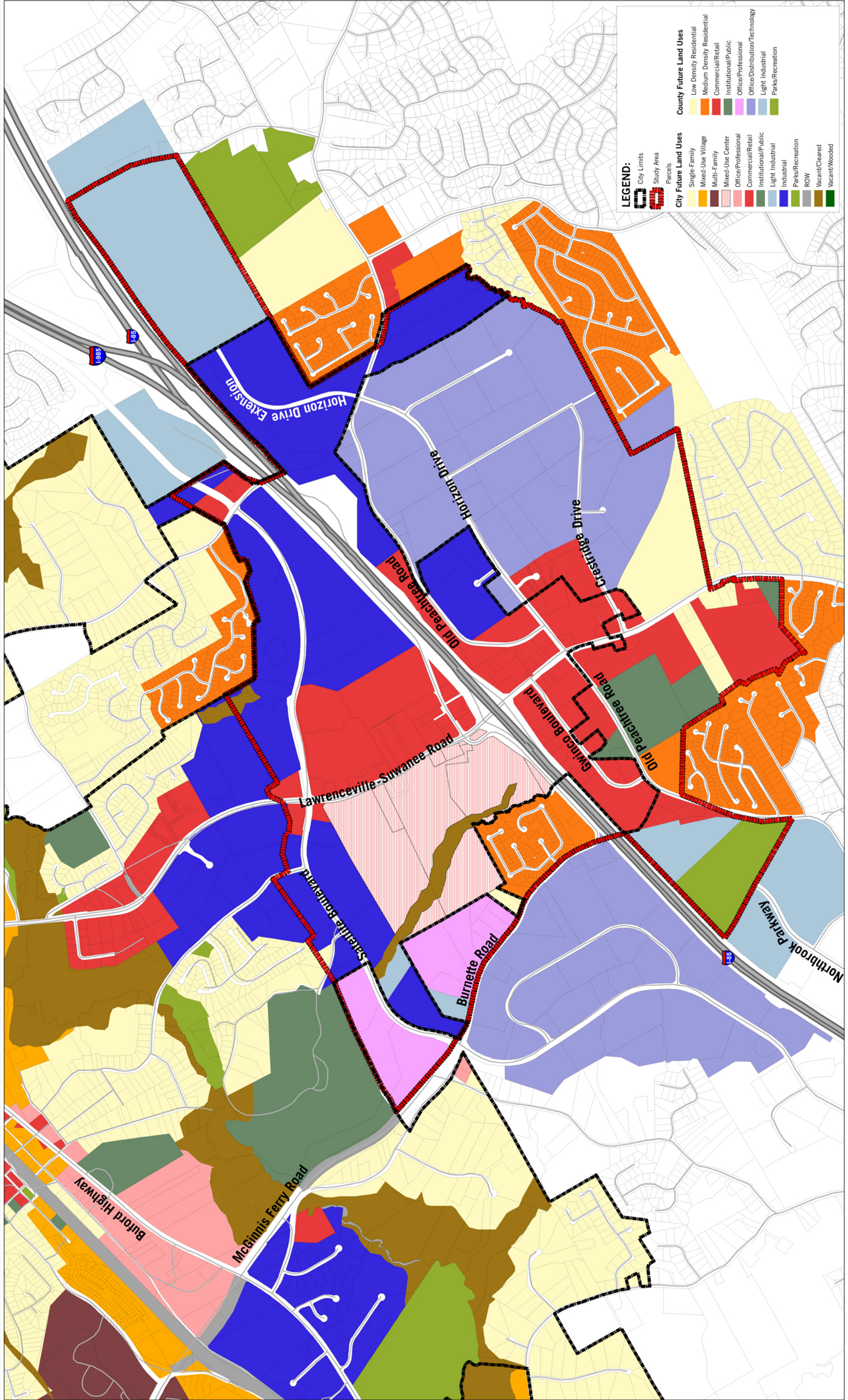
- Suwanee City Limits
- Study Area
- Parcels

CITY ZONING	COUNTY ZONING
C-1	R-60
C-2	R-75
C-2A	R-100
C-3	RA-200
I-1	HS
I-2	RM
PMUD	RM-8
R-100	RZT
R-140	O-1
R-85	M-1
RM-6	C-2
RM-8	
ROW	
TRD	

ZONING MAP

I-85 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY





FUTURE LAND USE MAP

I-85 BUSINESS DISTRICT MARKET ANALYSIS AND DEVELOPMENT STRATEGY



PART II: THE I-85 BUSINESS DISTRICT ECONOMIC DEVELOPMENT STRATEGY

The second part of the Suwanee I-85 Business District report focuses on creation of an economic development strategy for the future development of this vital part of the City of Suwanee. The creation of the strategy is based on the competitive assessment of the District as presented in Part I of this report, and our analysis successful strategies tried in other communities facing circumstances similar to those in the Suwanee I-85 Business District. We have also obtained significant input both from individual stakeholders in the area and during a public meeting on May 25, 2005 with stakeholders and other interested citizen and business interests. (The key comments obtained during the stakeholder meeting are summarized in Appendix A of this report.)

In Part II, a vision for the future development of the Suwanee I-85 Business District will be presented. To implement the overall vision for the area five inter-related implementation strategies will be presented and discussed. Finally, this section will conclude with a workplan of action steps to implement the vision articulated for the I-85 Business District.

Creating a Future Vision for the I-85 Business District

As documented in Part I, the I-85 Business District has evolved along with the burgeoning growth of the City of Suwanee and the surrounding I-85 corridor. The past 15 years have seen the transformation of Suwanee from a small, semi-rural community that was best known to regional residents as the home to the Falcons' headquarters, to a vibrant suburban community with a wide range of residential development, a new town center, a major industrial and business park presence, bracketed by two of the largest regional malls in the Atlanta region. As discussed in Part I, the I-85 Business District, which has served as an important gateway into Suwanee, has benefited from the development which has occurred around it:

- It is well established as an industrial and business park location and has maintained that edge in the industrial sector, though it is facing increasing competition.
- In terms of hotels and the hospitality industry, the District is in a much more competitive environment than ten years ago as many of its older properties are lagging under intense competitive pressure from the new lodging product located at the adjacent interchanges.
- The District lost the opportunity to serve as a major regional retail location, with the creation of Discover Mills and the Mall of Georgia bracketing the area to the north and south.
- Office development, while limited in the area, has tended to go south toward Exit 108/109 at Huntcrest and in the general vicinity of the Gwinnett Civic Center.
- Like any commercial area, the I-85 Business District's continued vitality depends on a gradual process of transition of its existing uses to stay current with changing tastes and development patterns. For example,
 - In the hospitality sector, the shift from full service hotels to limited service and extended stay properties has been a long term trend in the industry.
 - In retailing, the rise of the "big box" power centers and lifestyle centers, has created additional niche players in the former retail hierarchy of strip center/community center/mall.

To succeed in the future, the I-85 Business District needs to evolve with these changing trends to remain the vibrant and vital commercial core of the City of Suwanee.

City Objectives for the I-85 Business District

The city has established a number of objectives for the future development of the I-85 Business District:

- Its future development needs to be compatible with the city's future growth.
- The District should continue to serve as an important entrance into the City of Suwanee.
- The District should continue and expand upon its role as the primary commercial core of the city.
- The District should have its own mix of uses and character which does not compete with Suwanee's new town center district at the intersection of Lawrenceville-Suwanee Road and Buford Highway (Highway 23).
- The District should be a major positive contributor to Suwanee's tax base.
- The vision for the District should provide a sustainable development pattern that can be successful over the next several decades.

Thus, the goal for the I-85 Business District is to build on the significant base of businesses and enhance both the viability of the area and attract new businesses that will reinforce the identity of the area as a major gateway into Suwanee; one which reflects accurately on the quality of the community which surrounds it. It should also be distinctive enough that it complements rather than competes with Suwanee's new town center district near the historic heart of the community. It also should focus on commercial uses which can continue to make a major contribution to the City's growing tax base and help defer the costs associated with the strong growth occurring in other areas of the city.

Suwanee Gateway-- A New Vision for the I-85 Business District

The proposed vision for the I-85 Business District is to transform it over the next five years into *SUWANEE GATEWAY*. The concept behind Suwanee Gateway is to create a new identity for the I-85 Business District that is:

- *Greater than the sum of its constituent projects*—The idea of creating an overall theme and identity for the area is to “brand” the area with a distinct name and image that as the individual components of Suwanee Gateway change and evolve over time, will continue in the minds of residents, business and visitors. The local parallels to this “branding” of development areas include Perimeter Center, Concourse, and Post Riverside. In all of these areas, while the individual projects and tenants have changed dramatically with market changes, the powerful identity of the area remains.
- *Will endure and create value*—A strong identity built over time will create value for all in the area. For example, the association with Midtown or Vinings are thought to be so valuable, that the locations are claimed by projects miles from the actual areas.
- *Consistent, linking a diverse area and mix of uses together*—The District is currently a very diverse mix of uses, separated by vacant and underutilized parcels and bisected by I-85. Today’s visitor to the District does not get the impression of a well-planned attractive commercial environment, but rather the feel of just one more suburban commercial corridor, indistinguishable from so many others in the region. The Suwanee Gateway identity can provide a consistent theme between all of the currently unconnected uses in the District.

Why the term SUWANEE GATEWAY chosen as an identity for the District?

The selection of SUWANEE GATEWAY was based on several factors:

- “SUWANEE” was chosen to give identity not only to the area immediately around the interchange but of the City for visitors to the area. Since this area will continue to play a major role in introducing visitors to Suwanee, the City’s name needed to be prominent in the identity. It also would geographically ground the area that to many visitors, currently lacks a clear identity.
- “GATEWAY” was the term chosen to describe the area for several reasons. Historically Exit 111 has served as a major gateway into the community for regional travelers on the interstate and this should continue in the future. Second, Gateway was not a narrowly defined term, allowing it to be applied to a wide range of land uses and activities unlike “business park”, “center” or “park of industry” which were all thought too limiting. Gateway provides great flexibility as land uses and other components change in the future. Also, the term Gateway works well with the hospitality industry which is a key

component of the area. Finally, Gateway evokes a positive orientation about the future of the area and the City. *

How Will SUWANEE GATEWAY be physically transformed?

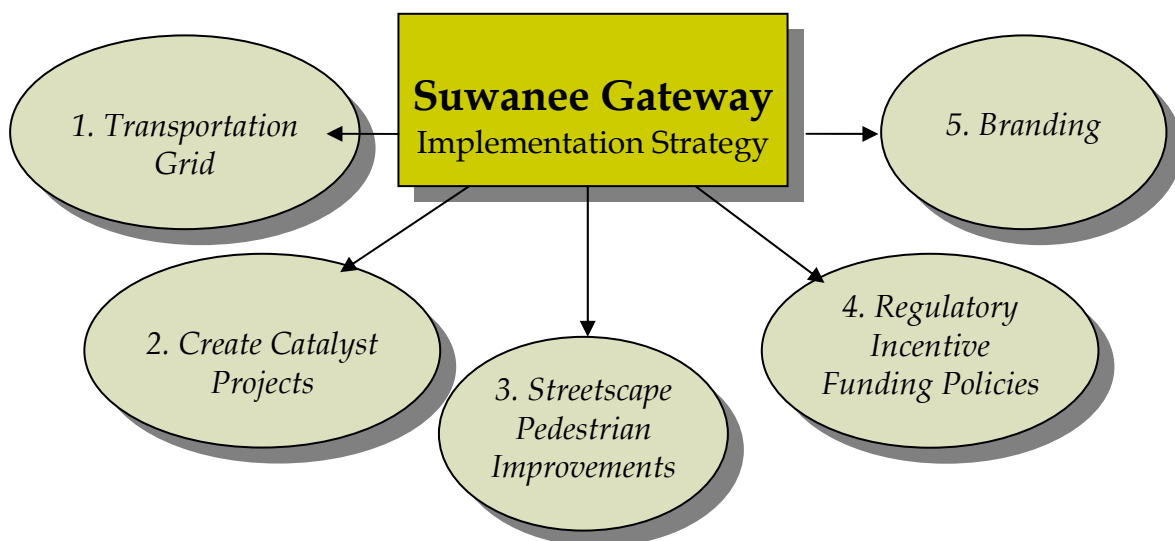
- As you approach Exit 111, it will *dramatically announce the arrival* into Suwanee Gateway through special signage, landscaping, lighting. It will be dramatically differentiated from the exits which surround it, and become the icon of the area.
- Lawrenceville-Suwanee Road will be redesigned with a *distinctive streetscape* and character which can soften the current visual clutter and communicate a uniqueness that becomes Suwanee Gateway.
- The Motorola and Falcons sites would be combined and developed into *Gateway Center, a major mixed-use development* combining office, retail, hotel and compact residential development with restaurants and structured parking that would be the anchor project of Suwanee Gateway. Internally, it would offer a distinct pedestrian-friendly environment with all land uses connected through a common internal circulation system and parkway.
- Gwinco Boulevard will be changed *into Celebration Drive as the focal point of the hospitality activities* in Suwanee Gateway. Through special street lighting, streetscapes and banners the area will offer visitors a restaurant/hospitality experience unique among other suburban centers. Over time, this will attract other hotels, restaurants, and nightlife into a concentration of hospitality product.
- Horizon/Old Peachtree Roads will be extended and connected north and south and renamed *Gateway Boulevard*. Crossings of I-85 will be possible at McGinnis Ferry and Smithtown Roads, relieving pressure on Lawrenceville-Suwanee Road.

* The selection of Suwanee Gateway as the identity for the area was made by the research team. The City of Suwanee may prefer another identity for the area based on input from its citizens and businesses as appropriate. Rather than the specific name, Suwanee Gateway, what is important is that a new identity for the area be established and promoted as a powerful branding concept for the area.

Suggested Implementation Strategies

The vision for Suwanee Gateway can only happen through the concerted action of the City of Suwanee, its citizens, and the affected property and business owners working to make the vision a reality. The creation of Suwanee Gateway will depend on an effective public-private partnership which combines public support to create theme and implement needed infrastructure improvements combined with substantial private investment both in existing facilities and in the future development of new projects consistent with the vision for Suwanee Gateway.

The transformation of the current I-85 Business District into Suwanee Gateway can best be accomplished through the effective implementation of a five part strategy as outlined below:



1. IMPROVE THE TRANSPORTATION GRID

Rationale: Additional routes through and around the Gateway are necessary to mitigate traffic congestion, to reduce the existing dependence on the Lawrenceville-Suwanee Road interchange, to facilitate the movement of local and regional traffic, and to provide infrastructure improvements that can accommodate new development.

Concept: This goal can be achieved by overlaying a transportation grid on the I-85 Business District. A grid system will provide alternative routes to allow east-west traffic to more easily maneuver through the area and north-south traffic to bypass the Interstate (see *The Transportation Grid* map on page 77).

- The skeleton of the grid is already in place and new key pieces are planned. It consists of Lawrenceville-Suwanee Road going east and west and Satellite Boulevard on the North and Horizon/Old Peachtree Roads on the South.

Satellite already connects the District with Exit 108/109 to the south and Exit 115 to the north, providing an alternative to I-85 for local traffic.

- Another key leg of the grid will begin to form with the implementation of the planned McGinnis Ferry Road Extension Project, which is anticipated to begin construction in 2007 (see *Competitive Assessment* for a full project description). The McGinnis Ferry improvements will create an east-west linkage over I-85 and will allow travel from Buford Highway and Peachtree Industrial directly to the south side of the interstate in the District. It will connect to Satellite and Horizon providing a key point of access for travel north and south on these roadways.
- The grid can be augmented in the future with an interstate overpass at Smithtown Road north of the Lawrenceville-Suwanee interchange. The bridge has been considered by Gwinnett County as a long-range improvement project but is not officially included in the Mobility 2030 Regional Transportation Plan. However, it has been included in the 2005 City SPLOST project list. The City should take the initiative to generate community support for the creation of the overpass as part of the County's SPLOST program. Its creation will provide another way to bridge I-85 and which can expand the Gateway's road network by connecting Satellite Boulevard and Old Peachtree Road/Horizon Drive.
- Old Peachtree Road/Horizon Drive has the potential to provide a parallel route east of the Interstate, just as Satellite Boulevard provides a parallel route to the west that connects all of the areas from Exit 108/109 to the south (Discover Mills/Gwinnett Civic Center) with Exit 115 to the north (Mall of Georgia). In addition, a single name should be considered for Old Peachtree Road/Horizon Drive, such as "Gateway Boulevard" to make it easier to negotiate the area and to help foster associations between the road network and the overall Suwanee Gateway area.
- The I-85 / I-985 Interchange does not allow southbound traffic from I-85 to access I-985, resulting in large numbers of trucks to exit on 111 to turn around and go North to I-985. This unnecessary traffic increases congestion on Lawrenceville-Suwanee Highway. The City, in coordination with Gwinnett County and GDOT should explore ways to improve the I-85 / I-985 interchange to avoid the need for U-turns using Exit 111.

The resulting transportation grid will provide three east-west routes: McGinnis Ferry Road Extension, Lawrenceville-Suwanee Road, and Smithtown Road/Old Peachtree Road/Horizon Drive. In addition, once the Grid is in place there will be three viable options for north-south travel: Satellite Boulevard, I-85, and Gateway Boulevard (Northbrook Parkway/Old Peachtree Road/Horizon Drive). Traffic wanting to go north/south will now have a wide range of options instead of the current single bottle-neck at Lawrenceville Suwanee Road, with access at McGinnis Ferry Road and Smithtown Road. This will allow Suwanee residents and visitors a wide range of options to cross the area and will provide needed additional roadway capacity to provide for the additional development which can be anticipated in the Suwanee Gateway.

2. DEFINE AND CREATE CATALYST PROJECTS

In an undertaking as complex and detailed as the creation of Suwanee Gateway, local communities need to marshal public resources and concentrate their efforts on those projects which can attract significant investment from the private sector to finance the majority of the needed improvements. Communities also need to implement a set of early “wins” to demonstrate the quick success and create a sense of momentum regarding the overall project.

Given the limited amount of public funding and staffing available for community development activities, the goal of this implementation strategy is to concentrate city resources on a short list of projects which can have a catalytic impact on achieving the overall vision for Suwanee Gateway. These projects should be thought of as essential “pump-priming” activities which will demonstrate the validity of the overall Suwanee Gateway concept. They also will take the current development environment to another level and demonstrate that Suwanee is ready for the next generation of suburban commercial development; much like the town center is providing evidence of the viability of mixed-use development around key public amenities at the city’s core.

After careful consideration of a wide range of potential projects, three catalytic projects are recommended for immediate action:

- A. Creation of the Gateway Center mixed-use project
- B. Development of Celebration Drive
- C. Upgrading and redevelopment of the Four Corners at the Exit 111

A. Creation of Gateway Center Mixed-Use Project

Rationale: A review of over 25 potential development parcels in the Suwanee Gateway area was conducted. The results of this review indicated that there are two parcels, which when combined, are sufficiently large, and strategically located to Exit 111 to provide an opportunity to create a development of sufficient scale and complexity that could influence the future development patterns in all of Suwanee Gateway. The combination of the Motorola and the former Falcon Headquarters sites would provide approximately 140 acres for creation of the Gateway Center.

Concept: The Gateway Center would be a mixed-use suburban commercial district combining lifestyle retail, office, hotel, medical center and various forms of residential uses into a signature project for Suwanee Gateway and for the city (see *Conceptual Masterplan* in Appendix C) The goal of the project would be to create a new “anchor” project in the commercial heart of Suwanee, taking commercial development in the area to a new level of intensity consistent with other “Edge Cities” in the Atlanta region such as Perimeter Center, Concourse, Post Riverside, Old Ivy, etc. It would include the following components:

- ***A central parkway*** would run through the property connecting all of the land uses with an internal circulation system, walkways/parkways and strategically located parking decks.
- ***Residential development*** would be concentrated in the western half of the site as a buffer with the existing residential in the area and to make a transition in densities from the surrounding areas. It would combine stacked condominium flats (260 units) with townhomes (160 units) and small lot single family homes (100 units). Condominiums may also potentially be included above some of the retail space in the project.
- ***Lifestyle retail*** would be created as a key component of the overall project (250,000 s. f.). The goal would be to attract a combination of anchor tenants and specialty retailing that could expand the retail offerings in Suwanee for all its residents. The retail component would be modeled on the Forum or the Avenues lifestyle center concept.
- ***Office*** would be developed in the southern half of the combined sites, taking advantage of the existing lake as an amenity and to provide visibility from I-85, it would be developed in a series of 4 to 6 story buildings (total 560,000 s. f.) The office could become the signature buildings of the Gateway Center visible to travelers on I-85.
- ***Medical***—The central location of the site could be an ideal location for a major medical facility which could consist of a new hospital and related medical offices and clinic or HMO medical center. There is no other major medical facility located in proximity anywhere on the I-85 corridor and the rapid growth of the area by affluent households would seem to offer a compelling market for a major

facility location. The medical could replace some or the entire office component of the project.

- **Hotel**—The hotel market in the Suwanee Gateway area and within the region is dominated by limited service hotel facilities. Given the absence of an all-suite or full-service hotel in the immediate marketplace, the Gateway Center, through its mix of uses and thus, demand segments could provide a viable location for attracting an all-suite or full service hotel to complement the other commercial uses in the market (up to 250 rooms) if the other components of the Gateway Center are created.
- **Intensity of Development**—Gateway Center needs to be planned at a greater level of intensity than currently exists in the area. It should have a more commercial feel and greater density than is occurring in Suwanee’s downtown to differentiate it from this effort. Structured parking which could be shared by the uses should be provided and easy access between the various project components is a necessity to enhance the mixed-use character of the area. Residents of the Center need to be able to easily walk to the retail and restaurant components. Office and medical workers should be able to access other parts of the project without having to get into their cars.
- **Access**—Critical to the creation of Gateway Center is developing a means of providing improved access to all parts of the site from Lawrenceville-Suwanee Road. This could be accomplished by developing a new access road on Lawrenceville-Suwanee which bisects the site and connects to the improved McGinnis Ferry Road and provides inter-parcel access to the Falcon’s site. This is a critical public improvement which would enhance the potential of the two sites and help achieve the vision for Gateway Center.
- **Greenspace/Connectivity**—Suwanee has placed great emphasis on providing parks and green space at strategic locations in the city. As a way of tying the various land uses together in the Gateway Center a landscaped parkway, preservation of the lake on the Falcon’s site and a greenway/walkway system connecting all of the components of the project, with a waterway connection could be a compelling amenity for the employees, visitors and residents to enjoy.

It is likely that the Gateway Center would require a long development cycle given the size of the parcel, and the current weakness in certain market sectors which would limit the immediate development potential for the office and hotel components. However, creating a master development plan for Gateway Center to guide the gradual build-out of the key elements is essential—otherwise, it is likely that this keystone parcel in Suwanee Gateway may be subdivided and developed as a series of unrelated non-catalytic developments.

Strategy for Implementation: The implementation of the Gateway Center should include the following steps:

- 2A-1. Work with the two principal land owners to develop a concept plan for the development of the site, provision of needed infrastructure and access.
- 2A-2. Commit to the creation of a TAD district to support the development of the - Gateway Center concept plan.
- 2A-3. The City and landowners jointly market the site to potential developers based on suggested development plan, new infrastructure (roadway) and TAD incentives.
- 2A-4. City officials should present the medical facility concept to each of the major hospital / health system executives in the region. This includes Emory, Gwinnett Health System, Northside, Northeast Georgia Health System, Children's Healthcare of Atlanta and any other major health care facility providers.
- 2A-5. Solicit and evaluate proposals to acquire the site and implement the key elements of the concept plan.

B. Establish the Celebration Drive Hospitality District

Rationale: The city has a significant hotel presence with nine properties totaling 761 rooms. However, competition with the adjacent interchanges has intensified given the addition of newer product and a compelling mix of services with nearby retail and restaurants. To enhance the appeal of the Suwanee Gateway as a hospitality location, and to ultimately increase the number of visitors and residents who come to the area to enjoy the hotels, restaurants and other entertainment activities, we would suggest undertaking an effort to enhance the appeal of Gwinco Boulevard as the Hospitality District within Suwanee Gateway. This should begin by renaming Gwinco Boulevard “Celebration Drive” and make it the focal point of the hospitality activities in Suwanee Gateway. The goal would be to reinforce the competitively positioned hospitality properties, increase the appeal of the existing restaurants and enhance the appeal of the area for additional hotel and restaurant development in the future, thereby improving its competitive position versus the hospitality offerings at the other exits.

Concept: To launch the effort, the name of Gwinco Boulevard would be changed to “Celebration Drive” and marketed as the Hospitality District of Suwanee. The goal would be to create a more visitor-friendly experience by implementing the following changes:

- Provide improved streetscape and pedestrian access between the existing hotel, restaurant, and retail uses in the area.
- Rename new connecting street between Celebration Drive and Old Peachtree Road.
- Make certain that there is good access to and from Celebration Drive for visitors and residents.
- Provide attractive lighting and banners that give the area a distinct feel, different from other parts of the Suwanee Gateway which will be more auto-dependent.
- Through signage and joint marketing, promote Celebration Drive as the hospitality location in Suwanee and along I-85.
- Coordinate special dining/lodging packages with area hotels and restaurants building on the Celebration Drive theme.
- Promote the restaurants within the Hospitality District to residents, in addition to visitors, by having a “townie night” as a special promotion for Suwanee residents and a “townie street fair “ evening to coordinate with the Taste of Suwanee event. Resident usage of restaurants along Celebration Drive will also increase once traffic issues for east to west activity are resolved.

- Make owners of vacant parcels aware of the current economic contribution of visitors to the area in terms of spending patterns, in an effort to help them market their properties to attract additional hotel, restaurant and retail uses to the area. Suggested catalytic changes will also enhance Suwanee Gateway as a hospitality destination.
- Limit the ability of existing properties to offer extended stay lodging. Work to eliminate the hotels with exterior hallways.
- Use vigorous code enforcement and policing of the area to make certain lodging properties are maintained and the criminal element does not become a major factor in the area.

Strategy for Implementation: Creating Celebration Drive will involve a combination of physical improvements and effective marketing and promotion:

- 2B-1. Facilitate a Gwinco Boulevard name change through the appropriate governmental entity.
- 2B-2. Create a Celebration Drive organization with all members of the Suwanee hospitality industry to plan and implement the effort. Those properties that are not physically located on Gwinco Boulevard should be encouraged to participate by leveraging the identity of Celebration Drive with their business which is at the same highway intersection. Interest in this effort could be stimulated by committing to:
 - Specific streetscape improvements recommended by the group.
 - Creating short-term marketing strategy
 - Seek joint signage / promotion opportunities
- 2B-3. Develop a streetscape plan that can create a distinct environment on Celebration Drive that can link the now isolated components together.
- 2B-4. Encourage better inter-parcel access between existing hotels and restaurants and urge them to have their establishments make a more welcoming orientation to Celebration Drive.
- 2B-5. Develop a marketing campaign with special food and lodging promotions for Celebration Drive to include all establishments within the Suwanee Gateway.
- 2B-6. Maintain strict code enforcement and safety patrols.
- 2B-7. Resolve the access issues from the new McGinnis Ferry, Horizon and Lawrenceville-Suwanee Roads to assure alternative and easy access to the area.
- 2B-8. Potentially extend Celebration Drive east of Lawrenceville-Suwanee Road, adjacent to the Admiral Benbow property as a way to tying the hospitality assets together.

C. Redevelopment Strategy for the Four Corners at Exit 111

Rationale: Residents and especially visitors to Exit 111 do not have a good first impression of the City of Suwanee when they exit from I-85. A combination of a vacant motel, vacant gas station, weed-choked lots and a sea of parking around an aging Waffle House and McDonalds does not reflect the quality of the community which surrounds these four critical corners at the interchange. In addition, the maintenance of the interchange itself suffers, evidencing a general sense of neglect so common at many commercial interchanges in our region. This vital part of the public realm needs to be better maintained. Upgrading the interchange and the properties at the immediate four corners around it would have a catalytic impact on residents' and visitors' impressions of the area and would be one of the most meaningful ways to show real progress towards creation of the Suwanee Gateway.

Concept: Upgrade the intersection and immediate four corners to provide a more appropriate entrance into Suwanee Gateway. The strategy for the Four Corners would include the following elements:

- Make major cosmetic improvements to the interchange to improve its appearance and include signage announcing Suwanee Gateway. This could include painting the interchange bridge and making landscape improvements which would create a more distinctive sense of arrival. Several major cities in Florida (Orlando, Jacksonville, Daytona Beach) are using the interchanges as places of arrival in their communities and this provides a practical model for Suwanee.



A concept photograph of what the Exit 111 interchange could look like based on an existing interchange in Orlando, Florida

- Limit signage and clutter from interchange access ramps. Create uniform directional signage program (wayfinding) which would highlight the key amenities and services in Suwanee Gateway.
- Adopt a coordinated landscaping program for the Four Corners to create a green and inviting perspective to visitors and residents in the area.
- Create a special overlay district for the interchange/Four Corners to enhance the quality of this critical area.
- Work with existing property owners to redevelop both the vacant motel and gas station sites.
- Work with owners of the Waffle House and McDonalds to provide greater landscaping and improve the visual appeal of their property.

Strategy for Implementation: The implementation of the Four Corners Initiative would require the following actions:

- 2C-1. Design the improvements to the intersection bridge and obtain GDOT approval and support (both political and financial) for their installation
- 2C-2. Commission a special way-finding signage system for implementation throughout the Suwanee Gateway, with special emphasis on improving the first impression created at the interchange
- 2C-3. Make major cosmetic improvements to interchange, including signage announcing arrival in Suwanee Gateway. Obtain funding to implement bridge improvement concept
- 2C-4. Limit signage and other visual clutter from interchange access routes
- 2C-5. Create special overlay district requirements to upgrade landscaping, lighting and the visual appeal of the area, that would be scaled for an auto-dependent area like the Four Corners
- 2C-6. Adopt a coordinated landscaping program for the Four Corners
- 2C-7. Work with key property owners at the four corners to upgrade the current vacant parcels and find more compatible uses for their properties

3. IMPLEMENT STREETScape AND PEDESTRIAN IMPROVEMENTS

Rationale: District-wide streetscape improvements can achieve four main objectives:

1. Create and reinforce a consistent image for the area,
2. Make the area generally more appealing for local traffic and for visitors,
3. Create visual impact in an otherwise cluttered commercial area, and
4. Conceal abrupt transitions in land uses.

Concept: The City's Lawrenceville-Suwanee Road Streetscape Master Plan (adopted 2004) recommends streetscape improvements along Lawrenceville-Suwanee Road between Satellite Boulevard and Crestridge Drive, as well as along Gwinco Boulevard. The project is a good vehicle for not only facilitating pedestrian movement through the area but also helping to create a distinct identity for Gateway area. The City is encouraged to implement the plan as opportunities permit and to expand the project listing by adding streetscape improvements throughout the study area, using the transportation grid as a framework. By expanding the scope of the streetscape plan, existing and new development will be tied together, and visitors to the area will be introduced to its distinct identity.

This identity can be reinforced with way-finding signage, which is not fully addressed in the streetscape plan. Signage is especially important given anticipated changes to traffic patterns that will be brought about by the McGinnis Ferry Road Extension project. The introduction of right-in/right-out turns from Gwinco Boulevard onto Lawrenceville-Suwanee Road, for example, will make it necessary to help guide traffic to local businesses that will no longer be accessible due to the removal of the existing left-hand turn onto Gwinco.

Stylistically, the proposed improvements, while attractive and thematically linked to the improvements in the new downtown, are for the most part too modest and insufficient in scale to have an impact in the environment of greater commercial clutter found in the I-85 Business District. We believe a much bolder plate of colors and scale will be required to be effectively "read" by visitors traveling through this auto-dependent zone.

An example is improving Gwinco Boulevard, which should be a priority streetscape project. The predominant uses along the roadway are restaurants and hotels, and a continuation of these uses on currently undeveloped parcels will reinforce the unique hospitality-based character of the area. Special lighting and banners that compliment the streetscape standards for the rest of the Gateway area can be employed, and a streetname that better represents the feel of the area can be given to Gwinco. An example is "Celebration Drive", and proposed treatments to the streetscape are shown below:



Existing



Proposed

Beyond Gwinco Boulevard, the use of taller streetlights will help create visible markers to give the study area its own identity. These streetlights can be consistent with the well-known style already used by the City, but a taller fixture is better scaled to the vehicular and pedestrian environment. These lights can also accommodate larger banners that depict a new design unique to the study area.

To further promote efforts to reinforce a specific identity, enhancements to the district's gateways are recommended. Consistent design elements at key points around the Suwanee Gateway will help "announce" the area. These points are located at major intersections, or gateways, around the area (see *Gateway/Key Intersections Map* on Page 104). A prime example is the proposed treatment of the Lawrenceville-Suwanee Bridge, elements of which could be carried throughout the district's gateways.



Proposed



Existing

Strategy for Implementation: The critical early steps for the implementation of a major streetscape and pedestrian improvement program should include the following steps:

- 3A. Develop a detailed materials palette that will promote the area’s unique character and ensure consistency among the various streetscape projects. The palette should address lighting, banners, signage, sidewalks, landscaping, and street furniture. It is anticipated that the Streetscape Master Plan will provide the basis for the proposed specifications, with more detail needed as far as overall design theme. Coordinate with Gwinnett County and GDOT on the sidewalk and median designs for the McGinnis Ferry Extension project, which call for twenty feet raised medians along McGinnis Ferry Road and the Northbrook Parkway extension, as well as sidewalks on both sides of the roadways. The potential for adding value to the aesthetic of the area should be investigated, such as adding landscaping to the medians. At the very least, compatibility between the project and the City’s streetscape standards is desired.

- 3B. Identify potential alternative funding sources to implement the improvements program. Examples include LCI funds, funds generated by a CID, and private-sector expenditures for streetscapes that are constructed to City standards as part of a new development.
- 3C. Create entrance features at edges of district.
- 3D. Create distinct streetscape plan for Celebration Drive and the Four Corners area.
- 3E. Develop and implant an improved maintenance and upkeep program for the district's roadways and sidewalks. This would include edging sidewalks, weed control, more frequent mowing, consistent litter removal, street sweeping and related tasks.
- 3F. Develop and implement an enhanced program of strict code enforcement for the district. This effort should be targeted at strict enforcement of the City's sign ordinance, care of premises regulations, dilapidated structures regulations, litter removal, property upkeep and all appearance-related codes.

4. REGULATORY, INCENTIVE AND FINANCING STRATEGIES

Rationale: The vision for Suwanee Gateway will not be achieved by market forces acting alone but rather, will require the City of Suwanee to create a package of “carrots and sticks” in terms of regulatory policy, incentives and a funding plan for public infrastructure to provide a supporting framework to attract the private sector investment to make the vision a reality. This approach has been used with great success in Suwanee in the past, with the creation of its new downtown to cite one major example. In that case, the city created a land use and regulatory framework to encourage the desired development, acquired key sites and invested in catalytic public infrastructure—the new park—to provide a supporting framework that has led to the substantial private investment which is now occurring in the area. We are proposing just such a strategy for Suwanee Gateway.

Concept: As with Suwanee’s new downtown, three essential elements of the support framework need to be put in place for Suwanee Gateway:

Regulatory

- *Future Land Use Plan*—The City has created a future land use plan for the area that generally will permit the types of development planned for Suwanee Gateway over the next decade.
- *Mixed-Use Zoning*—The City has established a mixed use zoning classification, Planned Mixed Use Development (PMUD), which addresses the Motorola/Falcons site. The site will have to be rezoned to a PMUD, which permits Planned Mixed-Use Centers. The zoning is intended to be flexible with respect to development standards, density, and site design, which is important for the successful build-out of the Motorola/Falcons site. The zoning also requires compliance with the Comprehensive Plan Design Guidelines, which includes General Design Guidelines, Guidelines for Mixed-Use Centers, and Guidelines for the Mainstreet/Lakeside Character Area, which specifically addresses the Motorola/Falcons site. The requirements of PMUD zoning and its associated design guidelines appear to afford the necessary flexibility for creation of comprehensive, viable scenarios for the entire 150 acres.
- *Overlay District for streetscapes and pedestrian zones*, special conditions for the Four Corners and Celebration Drive areas.
- *Adopt a “Quality Assurance Initiative”*—The City has to be vigilant in using its code enforcement, public safety and fire safety as important “stick” strategies to promote the upkeep of the older properties in the District which are showing signs of disrepair. Under Quality Assurance Initiative, the City vigorously enforces local codes and regulations to remove any early signs of blight or deterioration in the area. The theory is that if you show great attention to removing small problems, you can prevent the more major problems from occurring. This is particularly critical in the hospitality sector where a number of

- older properties are negatively impacting the image of the sector due to increasing crime, deferred maintenance and other issues. Vigorous code enforcement can also help maintain older properties so they do not detract from the environment in the area. In addition, a strong street maintenance and street sweeping initiative will help ensure the appeal of the area.
- *Regulation of Signs*—The area reflects its initial development pattern of highway-oriented commercial retail. More and more signs are erected as more and more retail and lodging locations are developed. Limiting future signs, lessening the number of new poles by allowing multiple signs on individual poles and using some of the existing billboards to do group advertising of Suwanee Gateway could all be effective strategies for rationalizing the current jumble of signs at the interchange.
 - *Regulating hotel quality*—An evaluation of the hotels with the highest incidence of crime in Suwanee indicates that they are the older properties with exterior corridors and/or allow extended stay guests. An important regulatory remedy is the City’s prohibition of any new hotels with exterior corridors. Disallowing extended stay usage except in pre-designated hotel zones or properties constructed specifically for this market segment would also be desirable.

Financing

- *LCI Funding*—The City should seek LCI funding for the transportation improvements and streetscape associated with Suwanee Gateway. The Atlanta Regional Commission (ARC) initiated a very successful program known as the Livable Centers Initiative in 1999. Suwanee has participated in the program for its new downtown. We believe that Suwanee Gateway is a logical project for future LCI funding. The current study has already addressed several transportation and land use issues associated with an LCI study for an “activity center” and can be used as the foundation for a more comprehensive plan developed in accordance with ARC requirements. This study has addressed a number of the major elements required in an LCI planning study. A complete application addressing the remaining requirements should be completed and submitted to the Atlanta Regional Commission, which administers the LCI program. Once the study is accepted, many of the streetscape and pedestrian improvements as well as related improvements for greater regional access would be eligible for future funding by the LCI program. Matched with funds from the CID, the LCI could be a major contributor to covering the cost of the proposed infrastructure improvements.
- *Create a TAD for Gateway Center*—The creation of a Tax Allocation District or TAD can provide a powerful financial incentive for the development/redevelopment of a major project. Authorized by the Georgia Legislature in 1985, TADs, which are Georgia’s version of tax increment financing, have become increasingly popular as a key incentive for redevelopment. The first TADs were the Westside for Centennial Olympic Park and Atlantic Station which were approved in 1999. Now TADs are being used

throughout the metro area, with Cobb, Cherokee, Fulton and DeKalb all using this financing technique. We believe a TAD would be a valuable incentive in the implementation of Gateway Center.

The creation of a Tax Allocation District or TAD can provide a powerful financial incentive for the development of a major project. We believe a TAD would be a valuable incentive in the implementation of Gateway Center to create the level of public improvements consistent with the vision for this area as a step above current development patterns in the area. The judicious use of TAD to support creation of public open space and pedestrian improvements linking land uses on the site, and create shared parking facilities could help achieve a development vision for the property beyond what current market forces can justify. The TAD can make the early investment on these public benefits work financially and allow the development to lead the market in terms of the quality and connectivity of the project and its uses. This incentive could permit the type of mixed use development envisioned for the site to lead the market and make it financially feasible to develop the type of mixed use commercial core that would take development to a new level in the this portion of the City.

The implementation of a TAD for Gateway Center would be a complex undertaking, involving the following steps:

- Passage of local legislation at the Georgia Legislature authorizing the holding of a referendum on the creation of a TAD.
 - Holding the referendum in Gwinnett County and the City of Suwanee authorizing the formation of a TAD in the city.
 - Preparing a redevelopment plan in accordance with the Redevelopment Powers Law of Georgia.
 - Seeking City Council approval of the Redevelopment Plan for the formation of the TAD district.
 - Seeking the concurrence of Gwinnett County Board of Commissioners and Gwinnett County School Board in their participation in the TAD.
 - Formation of the TAD on January 1 of the year following its approval.
- *Creation of a Community Improvement District to fund Infrastructure* – The ambitious streetscape, pedestrian and intersection improvements needed to create Suwanee Gateway will be costly if done in sufficient scale and of the quality necessary to set the right tone for development in the area. While some other sources of funding will be available, it is likely that a major local financial source will be required. Several other “Edge Cities” in our region, notably Cumberland and Perimeter Centers, have successfully used Community Improvement Districts (“CID”) to fund substantial infrastructure and streetscape improvements. More relevant in scale to Suwanee, Highway 78 in Gwinnett has formed a CID to fund an ambitious program of streetscape and pedestrian improvements, in an area characterized by smaller entrepreneurial businesses. A CID could be established for the Suwanee Gateway which would be designed to provide funding support

for the needed infrastructure, streetscapes and pedestrian improvements in the area.

The CID would be formed by a majority of the commercial property owners in the proposed district representing 75% of the commercial assessed value; residential properties do not participate in the CID, nor are they taxed. Once the CID is formed it can levy a special millage which would be used to fund the infrastructure projects. Importantly, CID funds are often used very effectively to leverage GDOT or other transportation funds, funding from the Livable Center Initiative of ARC or as a match for other funds which require a local match or contribution. Thus, local CID commitments can be leveraged with funds from outside the City.

The CID's are tools usually thought of as a "bricks and mortar" development tool, focusing on public infrastructure. However it can be used for promotion, security, street maintenance, safety patrols and other purposes as evidenced by the activities of the Midtown and Buckhead CIDs.

Strategy for Implementation: Creating the regulatory, incentive and financial framework is essential to the implementation of the vision for Suwanee Gateway. Important early implementation steps should include:

- 4A. Revise the mixed-use zoning classification to track the Gateway Center plan
- 4B. Modify overlay district with special conditions for Four Corners and Celebration Drive.
- 4C. Institute vigorous code enforcement and enhanced police patrol, presence and enforcement in the hospitality district. Identify funding for and implement enhanced services in the codes enforcement, right of way maintenance and public works areas.
- 4D. Regulate signs by limiting new signs, limiting the number of poles and allowing multiple signs on one pole.
- 4E. Increase hotel quality and safety by limiting extended stay hotels and prohibiting new exterior corridor hotels, both of which increase crime.
- 4F. Supplement the results of this study, to submit a full LCI application to ARC for Suwanee Gateway as a first step in obtaining needed infrastructure funding.
- 4G. Create a TAD district for Gateway Center once a joint process for marketing the site and land disposition is agreed to by property owners.
- 4H. Analyze the feasibility of forming a CID for Suwanee Gateway, and if favorable, implement.
- 4I. Identify funding for and implement enhances services in the codes enforcement, right of way maintenance, and public works areas.

5. BRANDING

While most of the recommendations for the Suwanee Gateway deal with its physical development, infrastructure, and other “bricks and mortar” issues, another over-arching implementation issue which needs to be addressed is the need to create a “brand” for Suwanee Gateway.

What is Branding?

“In its simplest form, a brand is a noun. It is the name attached to a product or service. However, upon close inspection, a brand represents many more intangible aspects of a product or service: a collection of feeling and perceptions about quality, image, lifestyle and status. It creates in the mind of customers and prospects the perception that there is no product or service on the market that is quite like yours. In short, a brand offers the customer a guarantee and then delivers on it....”

*Creating a strong brand identity will build **mindshare**, one of the strongest competitive advantages imaginable”*

Al & Laura Ries, The 22 Immutable Laws of Branding, 1998

What is Mindshare?

One of the main objectives of Advertising and promotion is to establish what is called mindshare (or share of mind). When people think of examples of a type or category of product, they think of a limited list. Any product included in an evoked set has mind share... At the extreme, mindshare is the status a brand can achieve when it is applied to a whole category of products. Kleenex, for example, once solely referred to Kleenex brand tissue but it has since become common to use it as a term to identify any tissue, even if it is from an opposing brand.

Wikipedia

Rationale: The Suwanee I-85 Business District does not have a distinct and consistent image in the minds of residents and visitors. To create that consistent image, and one which can bridge the wide range of land uses and activities, we have proposed creating a “brand” for the area--Suwanee Gateway. The brand is intended to be the identifier and image that overtime will become associated with the area. By creating the brand identity of Suwanee Gateway, we will be enhancing the awareness of the area to residents and visitors and put the area on a more level playing field with the interchanges at the Mall of Georgia and the Gwinnett Civic Center which have more clearly established identities.

Concept: Working with a marketing consultant or advertising firm, the City of Suwanee should implement the following integrated set of strategies to create the brand “Suwanee Gateway”:

- Design improvements to the interchange bridge to identify the area and make it the iconic symbol of Suwanee Gateway.
- Make other improvements to the interchange in terms of coordinated directional signage, landscaping and special lighting.
- Create an identity kit for Suwanee Gateway that would include a logo, color scheme, and joint advertising materials. Henry County's "Comfortably South of Atlanta..." campaign can provide a useful model of this approach. The kit would be disseminated to the various businesses in the District for use in their own advertising and promotional materials.
- Create a cooperative advertising effort with businesses in Suwanee Gateway to promote the location and identity in their advertising and promotions. This can be the most cost-effective way to establish the brand.
- Create a way-finding system throughout the District that is consistent and visitor friendly. (See Appendix B for an example of a wayfinding and signage program.)
- Create distinctive pylons and banners announcing Suwanee Gateway that are of sufficient scale and distinctiveness that they have a presence in the commercial clutter in the District.
- Develop an interstate billboard program for potential visitors on I-85 announcing Suwanee Gateway and the hotels, restaurants and retail attractions available. ("Come spend the night at Suwanee Gateway and enjoy one of our 761 comfy beds" etc.,)
- Develop a quarterly newsletter for Suwanee Gateway that goes to businesses, employees and visitors in the area talking about new trends, special events, planned improvements, number of visitors, economic impact, new projects, etc., to create a sense of identity and momentum.

Implementation Strategies: A successful branding strategy will require the following initial implementation steps:

- 5A. Hire marketing/pubic relations firm to develop brand campaign for the area.
- 5B. Create identity kit for Suwanee Gateway.
- 5C. Work on improvements to interchange and surrounding areas with signage announcing another improvement to Suwanee Gateway.
- 5D. Improve signage, landscaping, and streetscape based on Suwanee brand materials.

- 5E. Use branding materials in joint campaign marketing Suwanee as a tourist destination.
- 5F. Continue current marketing efforts such as coupons at welcome center.
- 5G. Increase regional marketing of Gateway through coordinated highway billboard campaign.
- 5H. Design improvements to overpass that distinguishes Suwanee Gateway for visitors and area residents.

What Will Be the Result of the Implementation Process?

In this section of the report we have outlined an ambitious program to create a new identity for the commercial core of the City of Suwanee -- Suwanee Gateway. Ten years from now, what would be the results of this effort for the City?

- Visitors and residents would know that when they get off at Exit 111 they are in the heart of an exciting commercial “Edge City”-- Suwanee Gateway.
- The area would have a distinct feel and look from the special lighting and landscaping that links the area together to the types of commercial development that has occurred.
- The Gateway Center will be the highway commercial hub of Suwanee Gateway, and will be a true live, work, shop destination for city residents and visitors to Suwanee. The Center will be a visible symbol of Suwanee’s growth as a major commercial center on the I-85 interstate corridor—distinctive from the areas around the Gwinnett Civic Center and Mall of Georgia interchanges. The Center will be a major employment center for Suwanee, providing the largest concentration of jobs in the city.
- Celebration Drive will emerge as a compelling concentration of hotels, restaurants, entertainment and retailing that will appeal to visitors, residents and employees in the area.
- The establishment of the transportation grid, will provide the traffic capacity to allow the new development to occur and will give Suwanee residents and businesses alternative ways to travel through this increasingly dense area. It will also link the area to the development occurring to the north and south of Exit 111.
- The investment in Gateway Center will stimulate a new wave of development in Suwanee Gateway, as property owners upgrade the existing retail and service businesses, thus expanding the tax base and employment opportunities in the city.
- Suwanee Gateway will become a destination along I-85 in the region and a location known to residents throughout the greater Atlanta area.

Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
1. Improve the Transportation Grid	<ul style="list-style-type: none"> Mitigate traffic congesting and reduce dependence on Lawrenceville-Suwanee Road. Facilitate movement of local and regional traffic; provide infrastructure improvements that can accommodate new development. Create north / south alternatives to I-85, and east / west alternatives to Lawrenceville-Suwanee Road. 	<u>1A. McGinnis Ferry Road Extension</u> 1A-1. Finalize plan in coordination with GDOT / Gwinnett County 1A-2. Implement project, including Gwinco Blvd. access road	GDOT / Gwinnett County City, Gwinnett	Immediate Mid-Term
		<u>1B. Smithtown Road Overpass</u> 1B-1. Create overpass design and get on County TIP	City, Gwinnett / GDOT	Mid-Term
		<u>1C. Old Peachtree Road / Horizon Drive Improvements</u> 1C-1. Design linkage of existing roadways between exits 109 and 115 1C-2. Rename Gateway Boulevard to create identity	City, Gwinnett / GDOT City, Gwinnett / GDOT	Mid-Term Mid-Term
		<u>1D. Explore alternative connection for southbound travel on I-85 to access I-985 before Exit 111</u>	City, Gwinnett / GDOT	Mid-Term
		<u>1E. Create Gateway Center roadway linking Lawrenceville-Suwanee Road with McGinnis Ferry</u>	City	Short-Term

Immediate – Six Months

Short-Term – One Year

Mid-Term – Two to Five Years

Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
2. Define and Create Catalyst Project	<ul style="list-style-type: none"> Focus public resources on a select number of projects to jump start new development and attract private more investment. 	<u>2A. Gateway Center</u>		
		2A-1. Develop cooperative site development plan	City / Property Owners	Immediate
		2A-2. Create TAD district to support development	City	Short-Term
		2A-3. Market site to potential developers, possibly through an RFP process	City / Property Owners	Short-Term
		2A-4. City officials should present the medical facility concept to each of the major hospital / health system executives in the region.	City	Short-Term
		2A-5. Reviewing proposals for adherence to the site's conceptual vision	City	Short-Term
		<u>2B. Celebration Drive Hospitality District</u>		
		2B-1. Change name from Gwinco Blvd to Celebration Drive	City / Property - Business Owners	Short-Term
		2B-2. Create a Celebration Drive organization with members from the hospitality industry to plan and implement a coordinated effort	City	Immediate
		2B-3. Improve streetscape and pedestrian access, including distinctive lighting, banners, and way-finding	City	Short-Term
		2B-4. Encourage interparcel access to increase pedestrian and automotive mobility through the area	City	Mid-Term
		2B-5. Promote through joint marketing efforts, dining / lodging packages for visitors, and theme nights for residents	City / Property - Business Owner	Short-Term
		2B-6. Maintain strict code enforcement and safety patrols	City	Immediate
2B-7. Resolve access problems arising from the McGinnis Ferry Extension project by ensuring the construction of a new road from Old Peachtree to Gwinco	City / GDOT	Short-Term		
2B-8. Extend Celebration Drive east of Lawrenceville-Suwanee Road	City / GDOT	Short-Term		



Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
2. Define and Create Catalyst Project (cntd.)	<ul style="list-style-type: none"> Focus public resources on a select number of projects to jump start new development and attract private more investment. 	2C. Four Corners Redevelopment		
		2C-1. Design the improvements to the intersection and obtain GDOT approval and support for their installation	City	Short-Term
		2C-2. Commission a special way-find signage system for implementation throughout Gateway, with special emphasis on interchange	City	Short-Term
		2C-3. Make major cosmetic improvements to interchange, including signage announcing arrival in Suwanee Gateway	City / GDOT	Short-Term
		2C-4. Limit signage and other visual clutter from interchange access routes	City	Short-Term
		2C-5. Create special overlay district requirements for the interchange / Four Corners	City	Short-Term
		2C-6. Adopt a coordinate landscaping program for the four corners	City / GDOT	Short-Term
2C-7. Work with existing property owners to redevelop vacant motel and gas station sites and improve Waffle House / McDonald's appeal	City / Property – Business Owners	Short-Term		

Immediate – Six Months

Short-Term – One Year

Mid-Term – Two to Five Years

Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
3. Streetscape and Pedestrian Improvements	<ul style="list-style-type: none"> • Use improvements to create and reinforce a consistent image for the area. • Create strong visual impact, concealing abrupt transitional land uses 	<u>Implement modified Lawrenceville-Suwanee Streetscape Masterplan</u>		
		3A. Modify plan to include all of Gateway Suwanee area and accommodate larger scale improvements along Lawrenceville-Suwanee Road	City	Immediate
		3B. Develop funding strategy combining LCI, CID and other funds	City, Business – Property Owners	Short-Term
		3C. Create entrance features at edge of district	City	Mid-Term
		3D. Create distinct streetscape plan for Celebration Drive and the Four Corners area	City	Mid-Term
		3E. Develop and implant an improved maintenance and upkeep program	City	Mid-Term
3F. Develop and implement an enhanced program of strict code enforcement for the district	City	Mid-Term		

Immediate – Six Months

Short-Term – One Year

Mid-Term – Two to Five Years



Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
4. Regulatory Incentive Funding Policies	<ul style="list-style-type: none"> Provide structured framework of “carrots and sticks” to attract private sector investment. 	<u>Regulatory Policies</u>		
		4A. Modify mixed-use zoning category to reflect Gateway Center plan	City	Immediate
		4B. Modify zoning overlay district for Gateway area to be consistent with recommendations	City	Immediate Immediate
		4C. Strict code enforcement, especially at older properties	City	Short-Term
		4D. Regulate signs by limiting new signs, limiting the number of poles and allowing multiple signs on one pole	City	Mid-Term
		4E. Increase hotel quality and safety by limiting extended stay hotels and prohibiting new exterior corridor hotels, both of which increase crime	City	
		<u>Financing Policies</u>		
		4F. Seek Livable Centers Initiative (LCI) funding from the Atlanta Regional Commission	City / ARC	Short-Term
		4G. Create Tax Allocation District (TAD) for Gateway Center for funding streetscape and infrastructure improvements	City / County / School Board	Short-Term
		4H. Create Community Improvement District (CID)	City / Property- Business Owners	Short-Term
4I. Identify funding for and implement enhanced services in codes enforcement	City	Short-Term		

Immediate – Six Months

Short-Term – One Year

Mid-Term – Two to Five Years

Action Plan for Suwanee Gateway Initiative

Strategy	Goals	Major Projects / Implementation Strategy	Responsible Parties	Time Frame
5. Branding of Suwanee Gateway	<ul style="list-style-type: none"> • Increase Suwanee Gateway's competitive advantage through the creation of a consistent, identifiable image that will outlast specific businesses or land uses. 	5A. Hire marketing / PR firm to develop branding campaign for area	City / Marketer	Short-Term
		5B. Create identity kit for Suwanee Gateway	City / Marketer	Short-Term
		5C. Make interchange improvements such as coordinated directional signage, landscaping and special lighting	City / Business Owners	Short-Term
		5D. Improve signage, landscaping, and streetscape based on Suwanee brand materials	City	Short-Term
		5E. Use branding materials in joint campaign marketing Suwanee as a tourist destination	City / Tourism and Travel / Business Owners	Mid-Term
		5F. Continue current marketing efforts such as coupons at welcome center	City	Short-Term
		5G. Increase regional marketing of Gateway through coordinated highway billboard campaign	City / Business Owners	Mid-Term
		5H. Design improvements to overpass that distinguishes Suwanee Gateway for visitors and area residents	City / GDOT	Short-Term

Immediate – Six Months

Short-Term – One Year

Mid-Term – Two to Five Years



Appendix A: Suwanee Stakeholder Meeting

On May 25th, the consulting team, Suwanee city officials and Suwanee stakeholders met to discuss the findings presented in Part I of this report and to review the recommendations presented in Part II of this report. After an introduction from Marty Allen, the team presented the findings and recommendations with three breaks for questions and comments.

The finding presented in Part I generated a discussion of the transportation improvements currently being devised by the Georgia Department of Transportation, especially stakeholder concerns regarding the changes planned for Gwinco Blvd and Burnette Road during the McGinnis Ferry Road expansion. The primary concern is that creating a cul-de-sac for Burnette Road will limit access to the Falcons / Motorola site. The team discussed the need for cooperation between the owners of both sites and city officials to devise and execute a plan to provide additional infrastructure that gives the site access from both Lawrenceville-Suwanee Road and McGinnis Ferry Road. The second concern regarding the current GDOT plan is the affect of the “right-in, right-out” access to Gwinco Blvd. There are concerns from business owners that this will limit the accessibility of the street both local residents and visitors to the area. As discussed in this report, it is imperative that the access road from Old Peachtree be constructed and that there is adequate way-finding and signage to direct automobile traffic to the area.

After presenting Part I findings, the team outlined the vision for Suwanee Gateway. The stakeholders were generally pleased with the recommendations and were curious about the status of the Falcons and Motorola site. Representatives from the Falcons property discussed the accessibility issues at the site. Stakeholders from the hospitality industry agreed with the assessment of the hotel and restaurant industry in the area and reiterated concerns regarding changes to the street network discussed above. It was agreed that while the Suwanee Gateway may not be a “walkable” environment, strategies should include increasing pedestrian access so that they can safely and comfortably walk from hotels to restaurants. There was also a concern that there is an increase in vandalism at some of the properties that should be addressed.

Finally, the team presented an outline of strategies designed to achieve the vision of the “Suwanee Gateway” district. Stakeholders were supportive of the outlined strategies and suggested that one issue that should be addressed is the interstate access between I-85 and I-985. Because there is no connection for southbound travelers on I-85 to access I-985, large trucks use Exit 111 to turn around, increasing traffic congestion in the area. There were questions regarding the timing and status of the projects and the team clarified that the strategies had not yet been implemented and funding would have to be found before many of the projects could begin.



Appendix B: Wayfinding and Signage

The wayfinding program for downtown Kalamazoo defines six “neighborhoods” or districts within the downtown area to direct people to a certain district before pointing them to specific destinations.

To identify these districts, a symbol and color were designed for each. Symbol characters and sign designs reflect the art deco aesthetic being implemented in the capital improvements.

The wayfinding system includes these elements:

- Trailblazers lead visitors to downtown Kalamazoo from outlying areas.
- Cultural Luminaires announce one’s arrival in the downtown area while providing cultural and historical information.
- Vehicular Directional Signs define the various districts and lead visitors to specific destinations in each district.
- Pedestrian Directional Signs direct pedestrians to nearby destinations.
- Pedestrian Maps located throughout the downtown direct people to destinations in the immediate neighborhood.

The wayfinding program is designed so that over time it can be expanded to include the entire city, incorporating the names of the many existing residential neighborhoods.

Source: Corbin Design



Appendix C: Conceptual Masterplan for Gateway Center



Conceptual Masterplan

Live, Work & Play

