

PHASE 1:
COMMUNITY ASSESSMENT

Submitted by Market Street Services Inc.
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PROJECT OVERVIEW: SMYRNA'S VISION

Working closely with City leaders, the business community, and Smyrna citizens, Market Street Services is facilitating an in-depth process that will culminate with a clear 10-year Vision Plan for Smyrna and guidelines to direct the City and its partners in implementation activities. The development of Smyrna's Vision will occur in three phases. Each phase will be guided by an engaged Steering Committee of leaders from across the community and will be informed by community feedback.

Community Engagement

The inclusion of community stakeholders in Smyrna's Vision is critical to the plan's implementation and long-term sustainability. Community involvement opportunities included public feedback and opinions gathered through focus groups, stakeholder interviews, an online community survey, and social media.

Phase 1: Community Assessment

The first phase of this process combines qualitative and quantitative research to produce a clear profile of the City. The Community Assessment is structured around a number of "storylines" and is intended to provide a common base of knowledge for thinking about the future of Smyrna. To provide context for the data analysis, Smyrna has been compared to Marietta, Georgia; Cedar Park, Texas; and Matthews, North Carolina. Data for Metro Atlanta, Cobb County, the State of Georgia, and the nation will also be included.

Phase 2: Smyrna's Vision

The second phase of the process is the determination of "what" Smyrna will do over the next 10 years. The Vision Plan will be informed and reflective of all the community input to-date, research findings, and discussions with community stakeholders. Not only will the Vision Plan articulate a concrete vision, but it will include objectives, actions, and tactics that will allow City leaders and residents to affect the desired change.

Phase 3: Implementation Guidelines

Timely and effective implementation is critical to the ultimate success of Smyrna's Vision. If the Vision Plan represents the "what," the Implementation Guidelines represent "how" Smyrna's Vision will be implemented. The Implementation Guidelines will include detailed timelines, assign tasks to community partners, address capacity constraints, estimate costs and funding sources, and provide measurement tools that will enable Smyrna's leaders and residents to track progress and goal attainment.

SMYRNA VISIONING INITIATIVE STEERING COMMITTEE ROSTER

Teri Anulewicz, City of Smyrna Councilwoman Ward 3
Holly Bass, Cobb Travel & Tourism
Jeff Belle, Vinings Mortgage
Maryline Blackburn, Artist and entertainer
Angie Bolton, IBM
Kim Brinson, Smyrna Tree Board
Anthony W. (Tony) Britton, Branch Banking & Trust Company, Co-Chair
Liz Davis, Keep Smyrna Beautiful
Stacey Evans, State Representative, House District 42
Ron Fennel, City of Smyrna Councilman Ward 7
Colin Gallagher, SmartBuild LLC
Slade Gulledge, Cobb Chamber of Commerce, Co-Chair
Chandra Harris, Congressman David Scott - Smyrna District Office
Eric Homansky, Smyrna Soccer Club
Winston Johnson, Maandi Media
Bill Marchione, Smyrna historian
David Monroe, Realtor
Susan Morgan, Public Relations Executive
Michelle M. Murphy, Co-President, Smyrna Elementary PTA
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Pastor Shell Osbon, Life Church Smyrna Assembly of God
Mel Pender, M&D Consulting Firm
Dan Penick, Campbell High School
Melleny Pritchett, City of Smyrna Mayor Pro-Tem and Councilwoman Ward 1, Co-Chair
Tim Stultz, Cobb Board of Education
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MAYOR AND SMYRNA CITY COUNCIL

Market Street would also like to thank Mayor Max Bacon and the City Council for their continued input and engagement in this process. Market Street will provide detailed updates to elected leadership throughout the process.

COMMUNITY ASSESSMENT

The Community Assessment is an analysis of Smyrna from many different directions. The goal of this document is to provide Smyrna leaders and residents with a common knowledge of the challenges, opportunities, and strengths that currently define Smyrna. Based on extensive research and public input, seven "storylines" have been identified that provide insight into Smyrna's current social, demographic, and economic dynamics. **While each story can stand on its own as a synthesis of qualitative and quantitative data, the storylines support each other and together provide a comprehensive understanding of Smyrna.**

The seven storylines are:

1. **Past, Present, and Future: What's Next for Smyrna?**
2. **Smyrna's Growth and Development**
3. **Public Education and Smyrna's Transitional Image**
4. **Quality of Life: A Defining Factor**
5. **Population Growth and Composition**
6. **Smyrna's Economic Landscape**
7. **Looking to the Future: Economic Opportunities**

GEOGRAPHIES: Data for "peer" and "aspirational" comparison communities are provided as context for the dynamics observed in Smyrna. These communities were chosen based on their similarities to Smyrna in population size, location within a large metro area, demographics, and other indicators that put into perspective Smyrna's performance as a city over the past few decades. Smyrna is compared to the following cities:

- ✓ **Cedar Park, Texas**: Located just 17 miles northwest of Austin, it is the third largest city in the Austin area and was the fourth fastest-growing large city in 2013. In 2012, Cedar Park had a population of 55,258 and 43.3 percent of its population had a bachelor's degree or higher. Cedar Park is approximately 23 square miles and boasts nearly 900 acres of park space.
- ✓ **Marietta, Georgia**: Neighbor to Smyrna, Marietta is similarly sized with a population of 57,564 in 2012; however, it has a large employment base, with nearly five times the number of jobs than Smyrna. Although also located in Cobb County, it has its own city public school district.
- ✓ **Matthews, North Carolina**: A suburb of Charlotte, the median household income is $69,946 and approximately half of residents have a bachelor's degree or higher. In 2012, Matthews' population was nearly 28,000, although its land in square miles is similar to that of Smyrna. In addition to a median commute time of 24.7 minutes, less than 5 percent of residents live and work inside the City.

Data for the Atlanta Metropolitan Statistical Area (MSA or Metro Atlanta), the state of Georgia, and the United States is also included. Where applicable, *Market Street* has also included limited data on other cities located in Metro Atlanta. The inclusion of data from comparison communities is neither an endorsement of different policy decisions nor intended to signify a best practice. Rather, the communities, which have much in common with Smyrna, should be seen as context-based benchmarks. Additionally, *Market Street* will utilize its database of best practices from a wide variety of communities across the country to help guide strategic recommendations in programs, policies, and initiatives made for Smyrna's Vision Plan.

FOCUS GROUPS AND INTERVIEWS: Each storyline leverages stakeholder input and comparisons to shed additional light on Smyrna's trends. Overall, 1,763 individuals participated in the online survey, 153 people filled out the "quick poll" hard copy of the survey, and *Market Street Services* held 20 one-on-one interviews and facilitated 13 focus groups. Opinions and thoughts from input participants are provided to illustrate the diversity of opinions of Smyrna residents and enhance the storylines. Public input from focus groups, interviews, and the two surveys will be in blue text and direct quotations will be italicized.

PAST, PRESENT, AND FUTURE: WHAT'S NEXT FOR SMYRNA?

Smyrna is built upon a rich history of community spirit dating back to the 1800s. In fact, over one hundred years ago the City's symbol and flower, the jonquil, was borne from the simple act of neighbors sharing flower bulbs. This early act of community in Smyrna lives on in the springtime tradition of planting jonquils and is still prevalent today. **Events and community gatherings, from the Jonquil Festival to Food Truck Tuesdays, are characteristic of the community spirit that endears residents to Smyrna.**

In the 1990s and early part of the 2000s, Smyrna was on the forefront of community development. Hallmarked the Market Village, the mixed-use development around the Village Green, Smyrna established itself as a city to emulate. Sought out as a best practice by other cities and awarded the Urban Land Institute's Award of Excellence in 1997, Smyrna and the Market Village brought new senses of place to Metro Atlanta. The redevelopment of Jonquil Plaza and Belmont Hills – two large plots of land near the Market Village – were planned as the next iterations of transformative developments. However, interruptions in the process, the Great Recession, and other hurdles delayed the development. As such, the efforts were put on hold and the land remains undeveloped. **Now that the economy is showing signs of recovery, building activity is increasing in Metro Atlanta, and employment levels are rising, residents are ready to get the ball rolling and are evaluating "what's next" for Smyrna.**

Through interviews, focus groups, and feedback from the public survey, Smyrna residents are ready to plan their future. As one respondent wrote, *"There is an opportunity to build something very special in Smyrna that doesn't exist anywhere else in Metro Atlanta."* Focus group participants said that not only is *"Smyrna growing up culturally,"* but there is an overwhelming *"feeling that Smyrna is upgrading."* This sense of ascendancy can be attributed to many things, but one survey-taker wrote that the direction that the City and City officials have taken *"by embracing family, community and the inclusion of different cultures"* has allowed Smyrna to shake off negative perceptions from previous decades.

The recent announcement of the new Braves stadium, located just over the Smyrna border, has created a stir of excitement in the community and has placed Smyrna in the spotlight. Residents are anxious about what impact the stadium will have on their City. Smyrna's opportune location is ideal to capitalize on this new development, yet it will take proactive, innovative, and aggressive planning to bring many opportunities to fruition. There is also a need to candidly face the challenges that will come with being so close to the new development – most notably, traffic. **This future development will impact many different facets of the community, including the local economy and quality of life, but has the potential to dramatically increase Smyrna's visibility** *"as a community known for something distinctive."*

One of the nation's most exciting developers, Jamestown Properties, is investing in Smyrna. Behind catalytic projects such as the Chelsea Market in New York and Ponce City Market in Atlanta, Jamestown is planning to develop 83 acres located in Smyrna on the Chattahoochee River. The development is slated to be a mixed use community with a mix of homes, shops, restaurants, and green spaces. There is no doubt that the Riverview Landing development could be a differentiating factor for Smyrna as it looks to the future.

Smyrna's location is clearly one of its greatest strengths. Located near many top universities, technical colleges, employment centers, transportation hubs, and health assets, Smyrna occupies a strategic position in Metro Atlanta. This placement is not lost on residents as many public input respondents cited that they moved to Smyrna because of its location. However, location alone is not why people enjoy Smyrna. The overwhelming sense of community and small town feel attracts and keeps many people in Smyrna.

Despite the community feel and passion from residents, there is a fragility to Smyrna's community that is exposed through many different channels. One of the reoccurring themes heard throughout input was that an overwhelming majority of residents have a desire to stay in Smyrna, but there is a breakpoint when it comes to education, amenities, and the long-term viability of calling Smyrna home. Families with school-age children particularly expressed these feelings and said that pressures to move to East Cobb or another city within Metro Atlanta, where education quality is seen as better, are strong. **These pressures are borne out as many families move when their children reach the middle school age and the dynamic has become a part of Smyrna's identity.**

As residents and the City look to the future, it is clear that many exciting and transformational changes are taking place. At the same time, the future must be analyzed candidly and challenges addressed in a proactive manner. The City of Smyrna has an advantage over surrounding communities as it has taken the first step in defining a new way forward: Smyrna's Vision.

Smyrna's Growth and Development

The ability and need to ask "what's next" is built on the patterns of growth and development that have defined Smyrna over the past few decades. Analyzing the interplay between demographics and development patterns provides insight into how Smyrna has grown and matured.

Between 2002 and 2012, the population in Smyrna grew at a faster rate than it had during the previous decade. At 14.4 percent, Smyrna's latest decade of population growth outpaced Cobb County's growth rate by 2.3 percentage points and grew at a faster rate than that of the nation. Marietta's population, which provides an in-county comparison, meanwhile, was near stagnant. The small positive net gains Marietta experienced between 2007 and 2012 were negated by similarly sized losses in the early 2000s. Of the remaining comparison cities, the populations in both Matthews and Cedar Park grew at faster rates. With Austin and Charlotte among the top 10 fastest-growing cities in the nation, it is unsurprising to see their growth rates mirrored in the suburbs. **The fact that Smyrna's growth was relatively even between the first and second halves of the decade, is notable as growth in the Atlanta Metro slowed by over five percentage points in the latter half of the 10-year period. The desirability of Cobb County and Smyrna as a destination is evident and has endured even during a period when household mobility was extremely limited.**

POPULATION CHANGE, 2002 – 2012

	2002	2007	2012	Change, 2002-2007 Net	Pct.	Change, 2007-2012 Net	Pct.
Smyrna, GA	46,032	49,620	52,650	3,588	7.8%	3,030	6.1%
Cedar Park, TX	31,150	42,408	57,957	11,258	36.1%	15,549	36.7%
Marietta, GA	58,394	57,370	58,359	-1,024	-1.8%	989	1.7%
Matthews, NC	23,572	26,147	28,699	2,575	10.9%	2,552	9.8%
Cobb County, GA	631,018	670,438	707,277	39,420	6.2%	36,839	5.5%
Atlanta MSA	4,473,044	5,048,708	5,439,950	575,664	12.9%	391,242	7.7%
Georgia	8,508,256	9,349,988	9,915,646	841,732	9.9%	565,658	6.0%
United States	287,625,193	301,231,207	313,873,685	13,606,014	4.7%	12,642,478	4.2%

Source: U.S. Census Bureau, Population Estimate

Intra-regional growth dynamics indicate that while Smyrna is growing, many nearby cities are growing faster. As shown in the following chart of selected Metro Atlanta cities, Smyrna is outpacing the City of Atlanta in terms of percentage growth, but lags many of the close-in suburban cities. However, it's important to note that while Smyrna's population growth outpaced that of the City of Atlanta since 2002, there are early signs of a changing of trends, similar to those experienced nationally, that suggest people are moving back into the urban core from the suburbs. In the 1980s and 1990s the City of Atlanta's population declined by roughly 20 percent as people gravitated to the suburbs. Recently, between 2010 and 2012, the City of Atlanta's population grew by five percent, while population in Smyrna grew by 2.5 percent over the same time period.

INTRA-REGIONAL POPULATION CHANGE, 2002 – 2012

	2002	2007	2012	Change, 2002-2012 Net	Pct.
Kennesaw, GA	22,988	27,487	30,990	8,002	34.8%
Alpharetta, GA	48,011	53,239	61,981	13,970	29.1%
Dunwoody, GA	39,986	43,819	47,224	7,238	18.1%
Duluth, GA	23,868	26,198	27,926	4,058	17.0%
Sandy Springs, GA	85,099	89,252	99,419	14,320	16.8%
Roswell, GA	80,563	84,183	93,692	13,129	16.3%
Smyrna, GA	46,032	49,620	52,650	6,618	14.4%
Atlanta, GA	407,646	410,086	443,775	36,129	8.9%
Decatur, GA	18,273	18,880	19,853	1,580	8.6%
Marietta, GA	58,394	57,370	58,359	-35	-0.1%

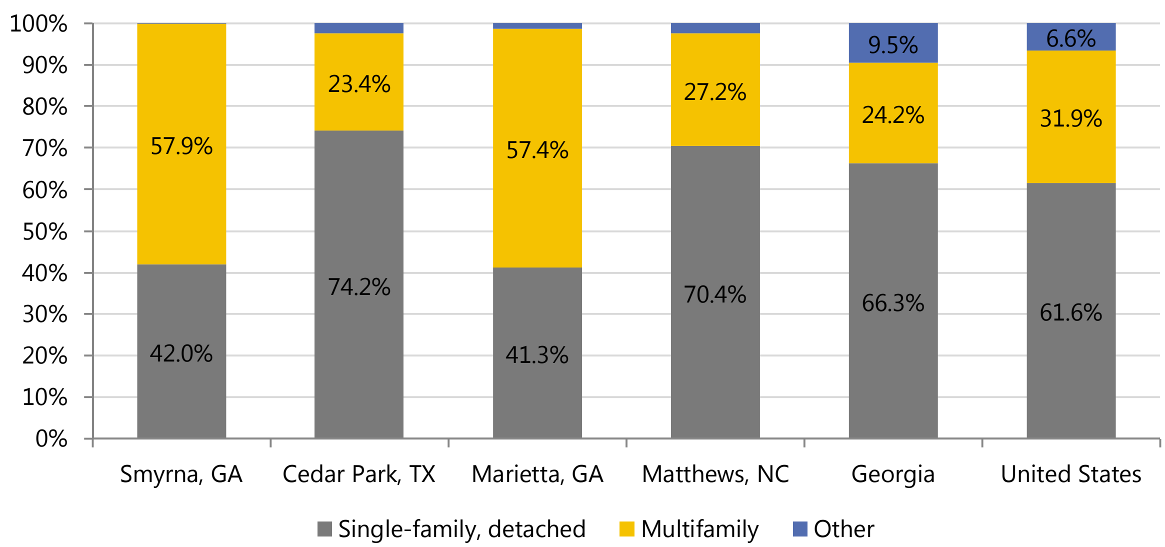
Source: U.S. Census Bureau, Population Estimate

As communities grow, they can colloquially, either grow "up" or "out." In other words, communities must develop and grow either outwards – increase land to accommodate the increase in people – through annexation or, when land is not available, grow and develop upwards – increase units and people per square mile.

Development patterns in Smyrna, while a mix of both "out" and "up," have encouraged comparatively denser living environments. Between 2000 and 2010, the City of Smyrna increased in land size by 10.5 percent.[1] Between 2000 and 2012, housing units increased by 28.2 percent. As a result, the population density increased 13 percent from 2,950 people per square mile to 3,340 people per square mile. This density is higher than Cobb County (2,026 per square mile) and the City of Atlanta (3,158 per square mile). Of the comparison communities, Marietta has the second-highest density (2,451 per square mile). Cedar Park had the lowest density with 1,589 people per square mile. **Growth that has occurred in Smyrna favors a more compact development to accommodate the increase in new residents.**

The elevated population density has resulted from an increased stock of multifamily homes, indicative of the "up" approach. **Smyrna accounts for 9.2 percent of the total housing units in Cobb County, but the City also accounts for 17.7 percent of Cobb County's multifamily housing units.** As shown in the following chart, Smyrna's distribution of multifamily units stands out from all the other comparison communities, with the exception of Marietta.

HOUSING STOCK DISTRIBUTION, 2012



Note: Labels for percentages under 5 percent are omitted
Source: U.S. Census Bureau, American Community Survey, 3-yr Estimates

Other factors, such as increased household sizes, are not driving densities in Smyrna. The average household size in an owner-occupied unit in Smyrna is 2.3 persons and is the lowest of the comparison communities. There was also very little variance between the average household size of an owner-occupied

[1] Note this does not reflect recent annexations, such as the 83 acre property on Riverview Road that Jamestown Properties acquired and was subsequently annexed into Smyrna in 2013.

unit and a renter-occupied unit – 2.3 and 2.2 persons per household, respectively. **Smyrna's high population density is not driven by an influx of large families; rather there are more housing units per square mile – both single family and multifamily homes – than other communities.**

The U.S. Census Bureau's classifications of multifamily housing stock can be understood as either apartment-style homes, which tend to be comprised of more than 20 attached units or townhome-style units which are typically classified as one-unit attached homes. Regarding apartment-style units, Smyrna has the lowest percentage of housing structures with 20 or more units. Only 20 percent of structures fall within this category in Smyrna. Nationally, 26.9 percent of housing structures had 20 or more units, whereas, in cities like Marietta, Matthews, and Cedar Park, the share is approximately 30 percent or more. Smyrna's stock of one-unit attached homes, corresponding to townhome (16 percent of all units and 28.2 percent of all multifamily units) is elevated above the other comparison communities. **In other words, multifamily housing in Smyrna skews away from apartments and more towards townhome/condominium structures.**

The situation in Smyrna – a lot of multifamily, with fewer apartments - is largely a result of the moratorium on building rental apartments that was put in place in the early 1990s. The moratorium, enabled by a City resolution, was an attempt by the City Council to slow and control growth, following concerns over pressures on infrastructure, schools, and services being felt at the time. Limited numbers of waivers were granted for apartment developments, but overall there were few new, privately-owned residential housing units that were authorized. While the moratorium is no longer in place, the presence of older, and conceivably cheaper, apartments was a flashpoint for many public input respondents.

There is undeniably a poor perception of apartments in Smyrna. They are blamed for many of the issues from safety concerns to the lack of quality in the local public schools. Many public input participants stated that apartments are a major problem because they *"cater to transient and low-income residents that foster crime."* Other respondents wrote, *"A major challenge is the numerous apartment complexes that were not maintained to a higher level and thus have become apartments that cater to the transient or very poor. This in turn leads to high crime as well as brings down performance at our local schools which then leads to a poor perception of parts of Smyrna and its schools,"* and *"Smyrna needs to have a more progressive approach to building on its strengths. The anti-apartment sentiment is nonsense. We need to attract young people to the city. We need to give them a reason to come here and a place to live and start their lives."*

Interestingly, despite the concerns over apartments and development patterns, many people have sought out Smyrna because of the diversity of housing that it offers. In fact, almost 60 percent of all survey participants said their primary reasons for choosing to live in Smyrna was that the housing options aligned with their needs. The "diversity of housing options" also received the sixth highest rating of 17 items related to quality of life in Smyrna.

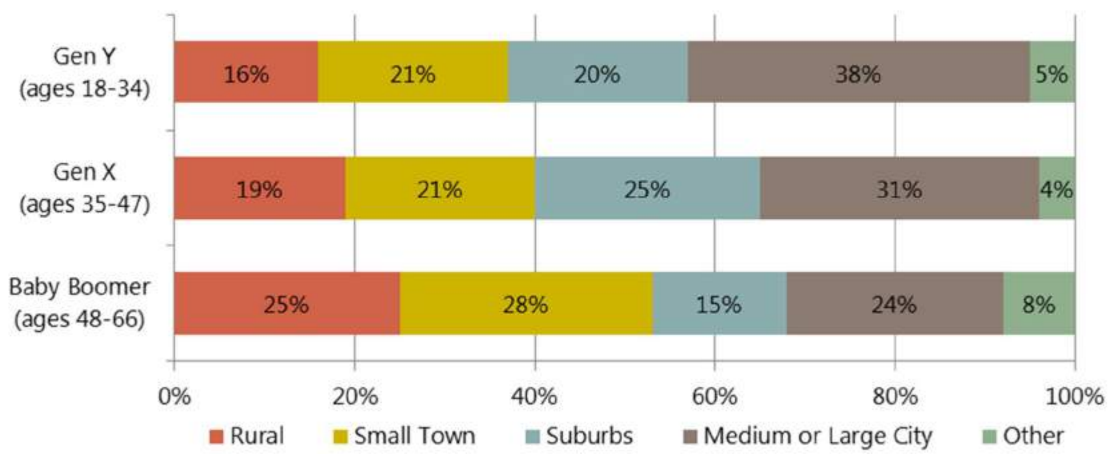
The overall consensus throughout focus groups and interviews was that there is a desire to accommodate many different types of housing options, but in a way that preserves the character of Smyrna.

One focus group participant stated that their vision for Smyrna was one that *"supports and embraces multi-generational population,"* such as townhomes and condos that cater to young professionals, middle income single-family homes for new families, "mansions" for more affluent families and then back to townhomes, condos, and apartments for empty nesters and retirees, and finally senior living for the aging population. As well, one respondent wrote, *"Smyrna has to allow more class-A apartment housing to help support the mixed use development as well as [...] it needs to make sure to provide housing that young professionals can afford to draw in the citizens of the future."*

The moratorium, while a means to slower population growth, has had a different and more concerning effect: the degradation of the current stock of apartments. **The lack of new apartment buildings, especially high quality units, has eroded any competitive or market pressures that would be placed on current apartment building owners. In fact, approximately 74 percent of renter-occupied housing units were built prior to 1989.** Without new competition, consistent code enforcement, and supportive zoning, rental options in Smyrna will continue to age and lose value, thereby decreasing the rent and increasing the bifurcation of the community through its aging multifamily infrastructure.

Taking care and investing in the built environment is becoming a defining factor for many communities. Comprised of assets like housing, parks, trails, commercial development, roads, and other physical amenities, the built environment actively shapes the look and feel of a place. Generationally, amenities that are being sought out are beginning to change. **Preferences for the kinds of environments are shifting and traditional single-family suburban developments are holding less appeal for younger and diverse demographics.**

PREFERENCES REGARDING PLACE OF RESIDENCE AMONG U.S. RESIDENTS (2013)



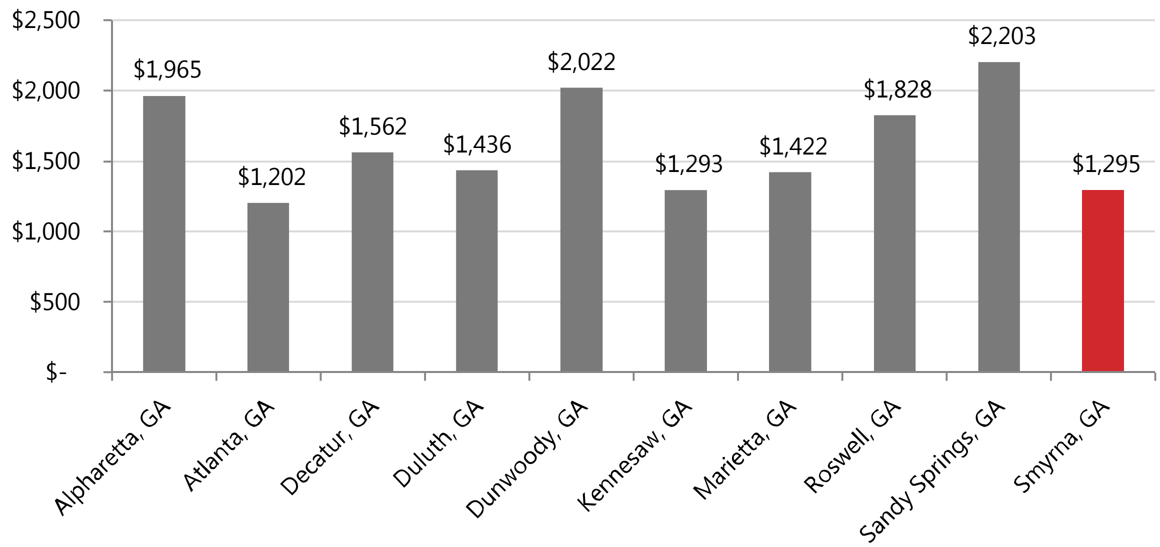
Source: Urban Land Institute; national survey of 1,202 adults conducted January-February 2013

The types of places that Millenials are seeking out tend to be denser in nature and offer rental options. **In fact, a national survey commissioned by Fannie Mae found that 90 percent of Millennials say that they would prefer to own a home than rent, however, tight lending standards, student loans,**

inability to afford a down payment, and competition from cash buyers work to support a culture of renting. Further, the homeownership rate for people under the age of 35 is at its lowest level since 1982.[2]

In Smyrna, the rental market provides a lure for many young families and is among the most affordable in Metro Atlanta. **In fact, the share of renter-occupied units in Smyrna (47.7 percent) is higher than all the comparison communities, with the exception of Marietta (54.8 percent).** The following chart from Zillow, an online home and real estate marketplace, shows a snapshot of the median rental prices for all rental properties – single-family homes, condos, apartments, etc. – in the selected cities listed. Only the City of Atlanta and Kennesaw had lower median rents than the City of Smyrna.

MEDIAN RENT FOR ALL RENTED HOMES, APRIL 2014



Source: Zillow.com

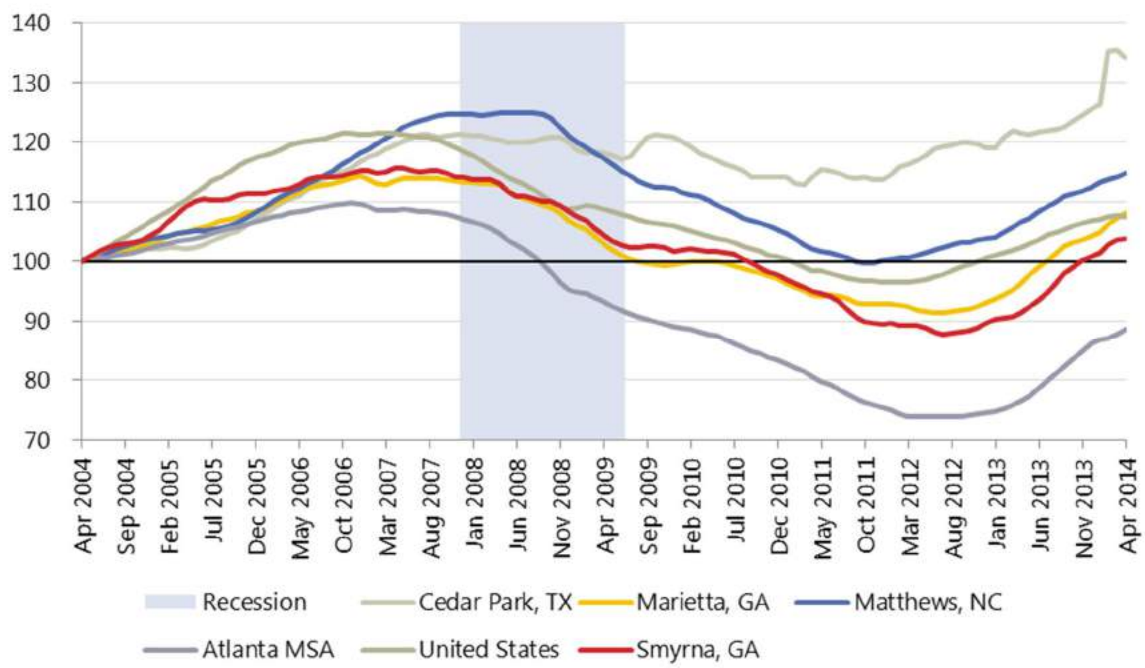
Input from Millenials and young professionals support the attractiveness of the rental and overall housing costs in Smyrna. As one person between the ages of 25 and 44 wrote, *"Housing was more affordable than where we lived in Brookhaven. Smyrna's proximity to town, Vinings and highways let us move farther away from Atlanta without leaving us feeling like we were disconnected from Atlanta. We really like the proximity to a variety of shops, restaurants and parks in Smyrna/Vinings and quickly we can be anywhere in the metro."*

Despite having a higher share of renter-occupied units (and corresponding lower than expected homeownership rates), the market for single-family homes in Smyrna reflects many of the same trends experienced by communities in the wake of the Great Recession. The single-family home price index from Zillow, in the following chart, shows the effect the housing bubble had on the comparison communities' single-family housing markets. Indexed to April 2004, it is apparent that the Georgia-based communities experienced larger declines in median prices for single-family homes than the nation and the other

2 Christie, Les. "Millennials squeezed out of buying a home." *CNN Money*. 1 June 2014.

comparisons. The effect the recession had on Smyrna appears to have been delayed compared to Georgia and the overall Atlanta MSA. Single-family home values dropped below their January 2004 assessment in October 2010, but have since then rebounded, and in November 2013, the median home value was back to parity with prices in 2004.

SINGLE-FAMILY HOME PRICE INDEX, 2004-2014



Source: Zillow.com

The development patterns and housing options in Smyrna have a direct link to the overall look and feel of the community. However, Smyrna's development is also impacting the local schools. **With many housing and rental options catering to different groups of people, there is a range of diversity and quality within the schools that serve Smyrna. Together, property taxes, socioeconomic status, and demographics are a few of the visible contributors to many of the challenges and strengths of the local schools.**

PUBLIC EDUCATION AND SMYRNA'S TRANSITIONAL IMAGE

As with any community, especially one that appeals to younger families, schools are a cornerstone concern. The quality, or perceived quality, of local educational options impacts the desirability of residential areas and can impact the longevity of residents in a community. Affecting change in education is often difficult as the outcomes can take years to come to fruition, but these changes are made easier through policy-setting by school district leadership. In Georgia, and many other states, the majority of school districts are created and run by either counties or cities. In Cobb County, there are two districts, the Cobb County

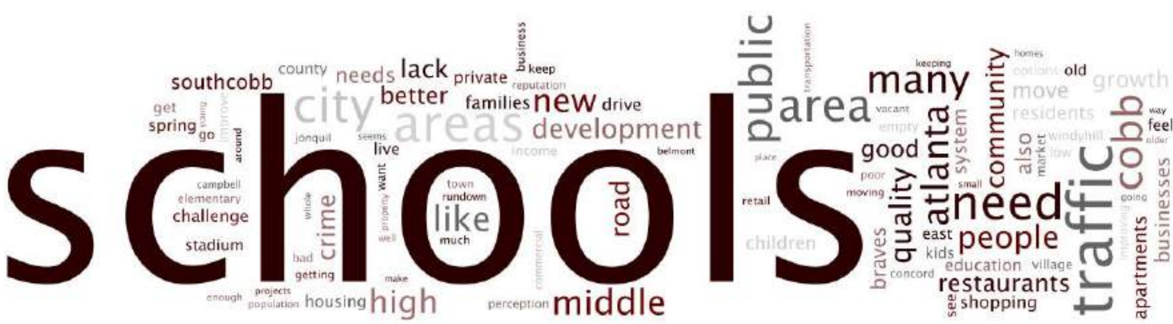
School District and Marietta City Schools. **The City of Smyrna does not have its own district and public school students attend Cobb County schools.**

The public education landscape in Smyrna begins with pre-kindergarten and funnels up to high school. The only public high school in the City, Campbell High School, is fed by two middle schools, Griffin Middle and Campbell Middle. Feeder elementary schools are numerous and include Nickajack, Argyle, Belmont Hills, King Springs, Teasley, and Smyrna Elementary, among others located outside of the City limits.

In addition to traditional public educational offerings, there are also other options for students and parents in Smyrna. Campbell High School is home to an International Baccalaureate (IB) program which is a magnet program from the Cobb County district and the International Academy of Smyrna provides a charter option for kindergarten through eighth grade. There are many private school options in Cobb County and the Metro area, including Whitefield Academy, which is located in Smyrna.

As shown in the following graphic, when asked to identify Smyrna's greatest challenge, "schools" was overwhelmingly the most common response.

SURVEY RESULTS: WHAT IS SMYRNA'S GREATEST CHALLENGE TO OVERCOME?



Note: The most frequently mentioned words are displayed in the largest font, with smaller words appearing less frequently in survey responses.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

The quality of the public schools in Smyrna was a heavily discussed topic throughout focus groups, interviews, and surveys, and the general consensus was that it is one of Smyrna's greatest challenges. The elementary schools are generally approved of and received mostly positive input; the middle schools and Campbell High School received more negative than positive feedback. Families are reportedly moving out of Smyrna when their children reach middle school age or sending them to private schools. Statements such as, *"Many of our neighbors have moved from Smyrna because of the middle school challenges"* and, *"Young parents see the test scores and although most of our elementary schools are fine, they flee the school system to private schools or worse, they move out of the City"* were consistently heard across many of the *focus groups*.

Specifically, challenges associated with the local schools include strategic direction, allocation of resources, strength of school leadership, academic quality, and student safety. Comments about the public schools included, *"[We need to] strengthen our middle schools and high school - while the Campbell High School IB program may be fabulous, it affects so few kids. We need strong education and excellence for ALL kids, not just a select few,"* and *"If Smyrna wants to keep the young professionals with families school options must be improved. I understand that there are elementary options that are good and that Campbell High has a great track record with the IB program, but the middle schools are a big hurdle that is causing a number of people to look at private schools or look for another place to live."*

The challenge with these kinds of statements and sentiments is ascertaining whether they align with reality. Concern over the negative impacts of perception is widespread and is a counter argument to a full dismissal of the public schools. Participants in the Young Adult focus group said that education is a primary challenge for Smyrna and that the community is not as united behind the local schools as possible. This perceived lack of support has generated and perpetuated an image problem. In particular, Campbell High School has a reputation as a socioeconomically "poor" school and a locus for drugs, which have overtaken the positive aspects, such as the genuine school spirit and the IB program. A survey respondent wrote, *"The perception is that Smyrna is the 'hood and Campbell is too. Of course, if you live here you know that's not true."* One school stakeholder said that if parents spent some time in the schools, their views would be radically changed. A Smyrna school leader also said that changing perceptions happens *"one parent at a time" – "if I can get them in the door, I can convince them."* However, in terms of academic performance, evaluation of graduation rates from Campbell High School and the associated ACT test scores, it is clear that Campbell is not as high performing as many of the high schools in Cobb County and lags the state of Georgia.

COBB COUNTY HIGH SCHOOL GRADUATION RATES AND ACT SCORES BY SCHOOL, 2013

	Cohort graduation rate (4-year)	ACT Composite Score
Harrison High School	96.0%	23.1
Pope High School	91.9%	24.8
Lassiter High School	91.4%	24.5
Walton High School	90.8%	25.6
Kennesaw Mountain High School	86.6%	ND
Allatoona High School	86.6%	21.9
Hillgrove High School	86.4%	21.4
Sprayberry High School	82.4%	20.4
North Cobb High School	81.5%	20.9
Kell High School	80.6%	22.0
McEachern High School	76.6%	18.8
Cobb County School District	76.5%	22.0
State of Georgia	71.5%	20.1
Wheeler High School	71.2%	24.6
Campbell High School	**66.3%**	**19.9**
Marietta High School	66.2%	21.7
South Cobb High School	61.0%	18.8
Pebblebrook High School	58.3%	18.3
Osborne High School	48.4%	17.0

Source: Georgia Department of Education, 2012-2013 school year

In terms of middle schools, Georgia's Criterion-Referenced Competency Test (CRCT) provides a mechanism for comparing eighth grade competencies in different subjects across schools. [3] **Of the subjects tested – English/Language Arts, Mathematics, Reading, and Science – all the Smyrna middle schools had lower percentages of students 'meeting' or 'exceeding' standards than the overall district averages. The only exception was eighth graders at the International Academy of Smyrna, which was tied with the district average for English/Language Arts.** While the numbers may not be among the lowest performing school, comparatively, there are achievement challenges evident in the middle schools. It should be noted that many communities struggle with maintaining strong middle schools, but the pressures in Smyrna may be more acute as there are many quality public and private school options nearby.

Another concern expressed though input was that the middle schools and the high school have safety challenges. School-level data provide insight into safety concerns and academic outcomes. In terms of

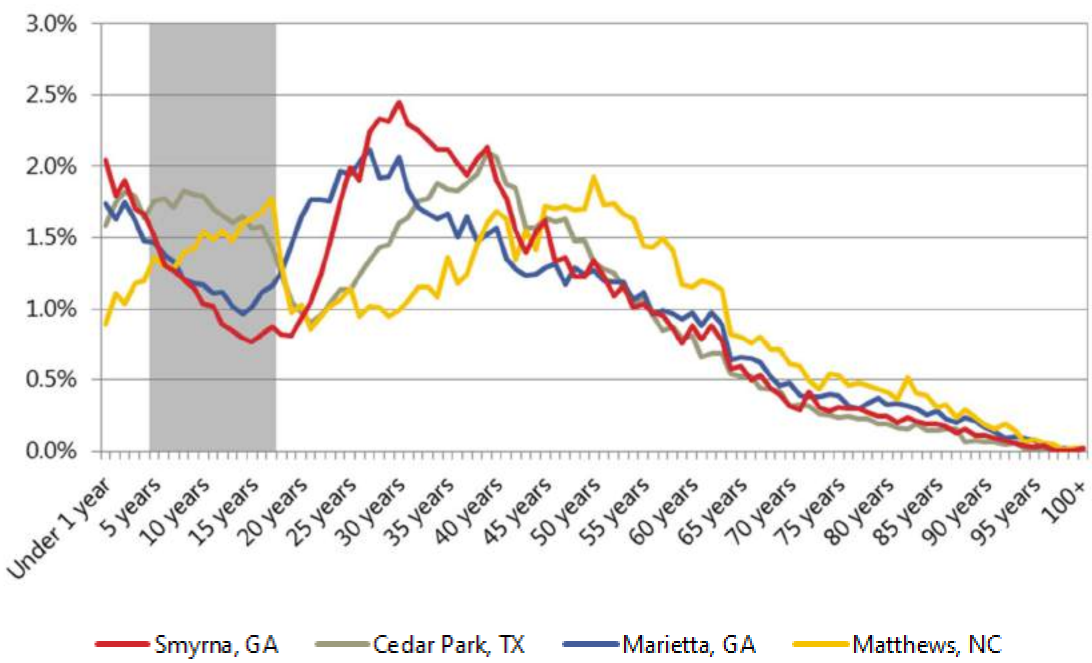
[3] Note that the Georgia Department of Education issued a statement reporting that a new testing system, the Georgia Milestones Assessment System will be implemented during the 2015-2015 academic school year and will replace both the CRCT and the EOCT.

safety, during the 2012-2013 school year, Campbell Middle School and Griffin Middle School had the 7th and 11th highest number of fights among all 112 Cobb County Schools, respectively. These rankings drop to 15th and 16th respectively when analyzed on a per capita basis. Campbell High School had fewer per capita fights than both middle schools and was ranked 42nd among all the Cobb County schools.

The challenges evident in the academic profiles of schools have consequences for enrollments and cohesion of cohorts as they progress through the system. In fact, there were 28 percent fewer students in the 2013 graduating class from Campbell High School than were enrolled in their sixth grade cohort in Campbell Middle and Griffin Middle in 2007. Additionally, during the 2009-2010 school year, there were 855 freshmen at Campbell High School, four years later, only 493 students were enrolled, a decrease of 42 percent. **These figures show that an unusually high number of students are not progressing all the way through the feeder patterns of the public school system in Smyrna, resulting in a lower graduation rate and high dropout rate.**

The dramatic change in the number of students progressing through the schools that serve Smyrna can be seen in the context of a broader trend of the exodus of families from Smyrna. The following chart shows a snapshot of the age distribution of Smyrna residents in 2010. **What is notable is that Smyrna has the highest share of residents under the age of two, but has the lowest share of population between ages seven and 20.** This "hollowing out" of the population directly correlates to the core school years.

POPULATION DISTRIBUTION BY AGE, 2010

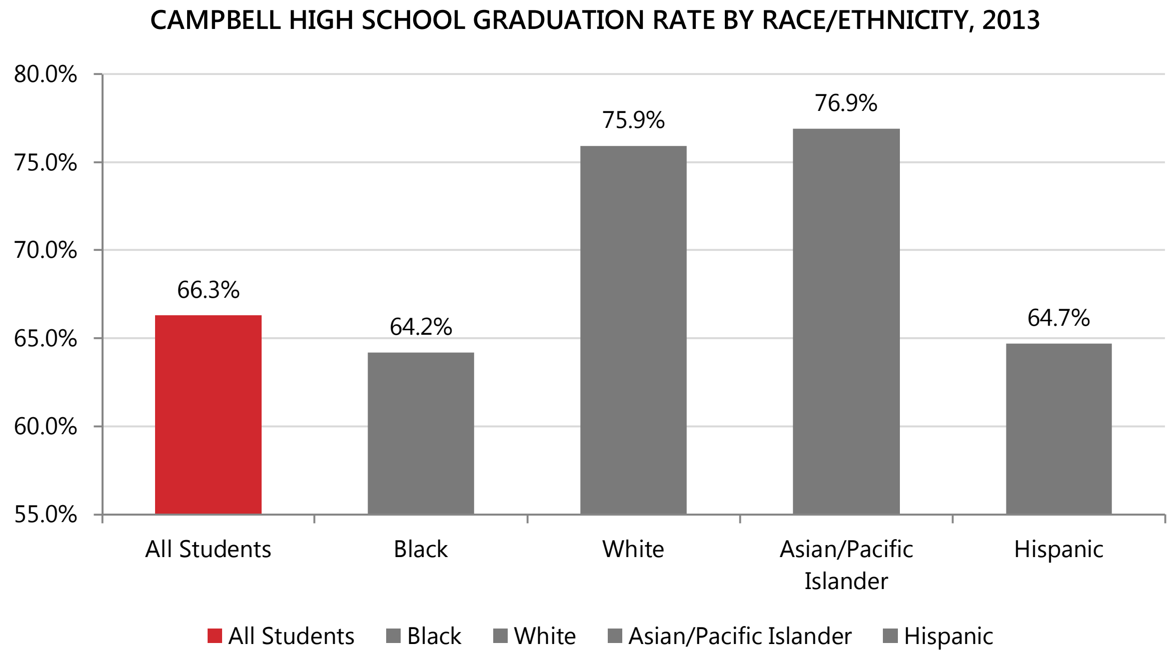


Note: The gray area highlights the ages that correspond to typical K-12 students. Each tic mark corresponds to a single year of age. Data for Georgia and the United States has been omitted for readability.
Source: U.S. Census Bureau, Decennial Survey

This dynamic is also decipherable as Smyrna has a high share of people in their late twenties and early thirties – typical childbearing years – but their ranks decline quickly as they near their late thirties. In many cases, the lack of children would be attributable to a low fertility rate. However, in Smyrna, fertility rates for women age 15 to 50 are higher (63 for every 1,000 women) than in Cobb County (49 in 1,000) and all the other comparisons, further underscoring the challenge of local education systems. It should be noted that Marietta shows a similar trend as Smyrna, though the magnitude of the changes are not as large. Comparatively, Matthews appears to have the inverse trend. Its sharp decline clearly aligns with high school graduates moving out of the City to pursue post-secondary education or other job opportunities elsewhere.

There is concern that families may be "prepped" for an eventual exit from the public schools. One respondent said that new homebuyers are reminded that they should incorporate the cost of private school into their budgets, as they will need to pay for tuition once their children are middle-school age. Looking at enrollments, Smyrna, at 16.5 percent, had the second highest percentage of children between the ages 5 and 17 enrolled in private schools. Approximately 13 percent of Marietta school-age children and 10.3 percent of school aged children in the nation were enrolled in private schools. **Smyrna's higher than expected private school enrollment reinforces the challenges apparent in the public schools that serve Smyrna.**

The challenge is not only that there has been an exodus from the school system, but that the students, who do stay, are not achieving equal educational outcomes. As shown in the chart below, white and Asian/Pacific Islander students graduate at a rate that is much higher than black and Hispanic rates. Further, white and Asian students account for only about 20 percent of total students at Campbell, indicating that educational gains are only accruing to a select group.



Source: Georgia Source: Georgia Department of Education, 2012-2013 school year

The difference in demographics and graduation outcomes by race and ethnicity is underscored by acute socioeconomic differences. The link between poverty and school performance has been well established. As the *New York Times* wrote in 2012, "Poor students have long trailed affluent peers in school performance, but from grade-school tests to college completion, the gaps are growing. With school success and earning prospects ever more entwined, the consequences carry far: education, a force meant to erode class barriers, appears to be fortifying them."[4] In Smyrna, the median incomes of black households and Hispanic households are just 60 percent and 42 percent of white households, respectively. The gap between black and white households is in line with the gaps seen in Cobb County, Metro Atlanta, and more acute than in Marietta. In terms of Hispanic and white households, Hispanic's share of white household's median household income is the lowest of all comparison communities. These differences can also be seen in poverty rates as white, non-Hispanics had lower poverty rates (5.8 percent) than black residents (20.5 percent) and Hispanic residents (30.1 percent). These rates reflect the dynamics within Metro Atlanta and Cobb County. **Taken together, the bifurcation of Smyrna along socioeconomic lines is apparent in some of the educational attainment outcomes in the local schools.**

The data paints a compelling story of the schools in and around Smyrna. **However, many parents, especially those with students in elementary school believe that change is in the air.** One of the effects of the Great Recession was that the bursting of the housing bubble left many people across the country immobilized – either because they were dealing with an underwater mortgage or they had lost their job and were financially challenged, and therefore, could not afford to relocate to another city. In

[4] DeParle, Jason. "For poor, leap to college often ends in a hard fall." *New York Times.* 22 December 2012.

Smyrna, this was viewed by many as a "silver lining" as fewer people were able to leave Smyrna to live in another school district and fewer families were able to afford the relatively high cost of private school tuition. **Between 2007 and 2012, the number of Smyrna children enrolled in public kindergarten through high school increased by 42.7 percent. The magnitude of this increase is not reflected in the comparison communities.** Matthews was the only other community with double digit increases (27.2 percent). Such a dynamic change indicates that families in Smyrna are coming back to the school system.

In addition to increased volume of students, many parents and local stakeholders are rallying around their schools. The opening of the new Smyrna Elementary is not only a hallmark of the increased demand, but is also viewed by many as a chance to build parental cohesion that can sustain students staying in public schools. Individual school foundations, such as the ones at Nickajack Elementary, Griffin Middle School, and Campbell High School, complement the work of the Smyrna Education Foundation and highlight catalytic parental involvement. Further, the grassroots and online effort by local parents, dubbed the Wave of Excellence, is beginning to have impactful conversations about the importance of the local schools and what can be done to improve overall quality.

There is no shortage of ideas on how to improve the quality of public education that is available to Smyrna's children. Responses to the question, "What do you think needs to be done to improve your school or district?" included, "*We chose our school district for its diversity AND quality. This is unique. If we underscore our uniqueness - and make it even more our strength, we don't just fix an issue - we leap frog,*" "*Middle schools and high schools need to feel safer, could be smaller and need to offer more character building opportunities,*" "*School board/community need to be actively involved in improving older schools (facility and offerings); creating a more positive image of public school offerings,*" "*A campaign to help parents understand the merits of our middle and high school education in the area would go a long way,*" and "*Our schools need to find a niche…whether we become known for a great arts program or are responding to the changes in the economy and become known for IT excellence – find our niche and dedicate ourselves to building a reputation that will attract people from all over.*" One respondent put it very succinctly: "*Bottom line, the citizens of Smyrna need to take back OUR schools, expect more, engage more, and become more.*"

Quality of Life: A Defining Factor

The quality of a place is not easily measured. Whether it's education opportunities, the weather, health care, public safety, amenities, proximity to family (near or far), or other considerations, people choose to live in places for different reasons. As was mentioned previously, input participants overwhelmingly said they enjoy living in Smyrna and would like to continue living in the City. However, there was a feeling that if circumstances were to change they would be able to leave. **While this may be true for many residents, it becomes increasingly important as "moving on" from Smyrna has been established as a part of the community's lifecycle, especially for those with school-aged children.**

The John S. and James L. Knight Foundation teamed up with Gallup to investigate the factors that attach residents to their communities. Over three years, the team studied 26 different communities, surveyed over 14,000 people each year, and held over 200 interviews. The three things that were identified as being the most related to community attachment were social offerings, openness, and aesthetics. The stakeholder survey that was conducted tried to get at some of these characteristics in order to gauge what Smyrna residents think about quality of life in the City. Overall, when asked to rate the overall quality of life in Smyrna, 76.7 percent ranked it as "good" or "excellent."

The following graphic shows some of the most common words that were used when survey-takers were asked to identify the greatest strength of Smyrna. What is clear is that there is a great sense of community that pervades Smyrna. Focus group participants said that Smyrna is a "place where you want to live" and that there is a "cohesiveness to Smyrna" that is not found in many other places.

SURVEY RESULTS: WHAT IS SMYRNA'S GREATEST STRENGTH?

Note: Words are scaled based on their frequency of mention by survey respondents with more frequently mentioned words shown in larger font.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

LOCATION: In addition to community, it is clear that many people value Smyrna's proximity to Atlanta. As seen in the previous graphic, many of the largest and most frequently used words to describe Smyrna's strengths centered on its location. The proximity to Atlanta, downtown, the airport, highways, and overall convenient location were all characteristics that survey respondents, focus group contributors, and interview participants cited as a top asset for Smyrna. Many discussions related to the advantages of Smyrna's location segued into concerns over traffic and congestion, though the problem is not as acute as other northern suburbs. As one respondent wrote, "*Compared to the rest of North Atlanta (we have many friends in North Metro from East Cobb, Woodstock, Alpharetta, and Lawrenceville) and their traffic is abysmal compared to Smyrna. We moved near here in part because the traffic is better in comparison to the northern suburbs*."

TRANSPORTATION: Residents are interested in better connections to Atlanta as options such as MARTA, mass transit, and increased bus connectivity were all cited as needed mobility improvements. When asked to identify mobility challenges, respondents wrote, "*Relatively speaking...mobility is good in Smyrna, as long as you own a car. Several areas are just very congested,*" "*Traffic. Would use public transportation if it was faster, but only CCT buses are in Cobb, and they travel the same overcrowded roads I do. Light rail centrally located with ample parking would greatly improve transportation & traffic flow,*" "*We're hoping and praying that the area around the proposed Braves stadium by 285 doesn't become a nightmare on game days / nights,*" "*I am*

68 years old and still drive, I am concerned about what I will do when I can no longer drive," and *"Lack of walkability in Smyrna in terms of development patterns. The car-oriented and strip development. The trail system is ok, but it does miss S. Cobb Drive and Windy Hill."*

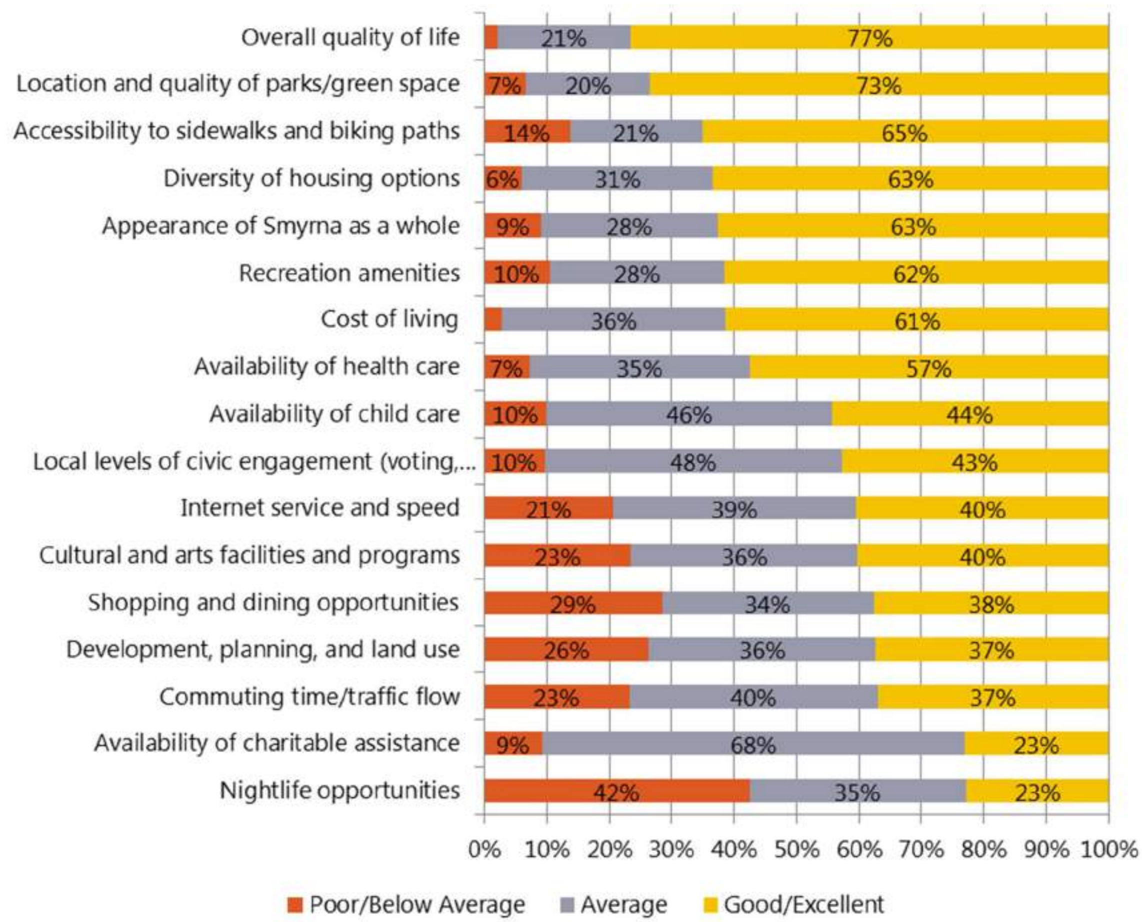
When prompted for improvements, many people mentioned alternative transportation options such as light rail or a circulator. Respondents wrote, *"If Smyrna were tied in, by rail, to the MARTA system it would greatly impact EVERYONE'S mobility. It would make Smyrna a significantly more viable option for many who work in MARTA accessible areas as well as more attractive for business," "For entertainment, I wish Smyrna were connected to the Atlanta rail network by some fixed transit (preferably light rail transit, but bus rapid transit would probably do). Buses are not adequate for the main connections," "Would love to see a shuttle from Village Green to the new Braves stadium. We could have dinner and drinks first, then see a game,"* and *"Convert major intersections into nodes by enhancing grids or creating them where they don't exist (e.g. South Cobb Drive at Concord Road, Windy Hill at South Cobb Drive, and East-West at South Cobb Drive). Create shuttle circulators to connect the nodes and Cumberland and Vinings so people can get from walkable area to walkable area with ease, and to pull in shoppers and business people."*

ATTACHMENT: In terms of community attachment, respondents were asked to rate their level of attachment to Smyrna, Cobb County, and Metro Atlanta. Residents felt most attached to the City of Smyrna and Metro Atlanta, but felt less connected to Cobb County. When asked to explain feelings of attachment many people mentioned their history in the community, their friends, and their family being nearby. Others pointed to life events such as the birth of children or the purchase of their first home as increasing attachment to Smyrna. Other responses included, "*Living in the Market Village with the ability to participate in many of the City sponsored activities," "The local spots- Rev Coffee, Siam Square, local Goodwill, Vickery Hardware*," "*Involvement with churches, civic organizations, volunteer opportunities, good local government*," and "*Community Events like Food Truck Tuesday and Concert in the Park*." On the other hand, respondents pointed to things like crime, walkability, public school challenges, and the lack of social activities as detracting from feeling more attached. Responses also included, "*No parks within walking distance for most residents. Would like to see multiple (smaller) green spaces within walking distance of most residents*," "*As the population becomes younger wish there was more outreach to engage the younger population in Smyrna future development*," "*Not a lot of nightlife, social activities*," "*When I walk- I feel good, and connected to a place- and in Smyrna it is hard just to pop out your door and walk to the grocery store. [The way Smyrna has] been designed makes it difficult to walk, and almost mandatory to drive (our little automobile bubble)*," and "*Other than a few places in the Market Village, there's not much to keep folks socializing (for work or for play) here*."

One of the hallmarks of community attachment is civic engagement and capacity for leadership. When asked about "local levels of civic engagement (voting, volunteerism, etc.)" 42.6 percent of survey respondents said they were "good" or "excellent." Further, civic engagement and participation in civic clubs was identified as one of the key ways residents feel attached to the City. However, when it comes to voting turnout and future leadership, respondents expressed concern over small participation and the lack of a pipeline of new leaders.

AMENITIES: The following chart shows the aspects of quality of life that survey respondents rated and there is evidence that social offerings could be more competitive in Smyrna. Offerings such as nightlife, shopping and dining, and cultural and arts opportunities were rated the least strong among the options. It should be noted that while nightlife and shopping/dining did not receive as favorable ratings as other things, residents often mentioned proximity to Atlanta as one of Smyrna's greatest strengths and most attractive features. So while those amenities aren't as abundant in Smyrna, residents are closer to the "city amenities" than many other suburbs that Smyrna competes with for residents. Balancing the desire for these kinds of amenities within Smyrna's place in Metro Atlanta and residents' desire to keep the "small town feel" of Smyrna will be an important dynamic as Smyrna seeks to continually improve how it caters to its residents. Notably, Smyrna residents rated quality of parks and green space, accessibility to sidewalks, and the appearance of Smyrna as a whole as being among the best of what Smyrna offers residents.

SURVEY RESULTS: PLEASE RATE THE FOLLOWING ASPECTS OF QUALITY OF LIFE IN SMYRNA, BASED ON YOUR EXPERIENCES WHERE YOU LIVE.



Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

GREEN SPACE: Residents love Smyrna's parks, dog parks, and green spaces. These amenities were referenced many times when survey-takers were asked about Smyrna's greatest strengths. The proximity to the Silver Comet trail, which is a 61.5 mile paved 12-foot wide path that begins in Smyrna and runs to the Alabama-Georgia state line where it connects to the Chief Ladiga Trail, was lauded by many residents as a defining amenity. Residents would also like to see additional green space, recreation, trails, and park amenities, especially if they offer pedestrian connectivity to shopping, dining, and other recreation opportunities.

OPENNESS: Welcoming and openness is another aspect of community attachment. When asked about the veracity of the statement, "In general, Smyrna is an inclusive, welcoming place where a diverse range of people can find a home community," 88.9 percent of respondents agreed. However, respondents also said that there is progress yet to be made. As one respondent wrote in response to the previous statement, "*True, but we need to build on that (people who don't live in Smyrna don't yet have that perception, for the most part), and truly cement our reputation as a forward thinking, inclusive and safe community that has world-class schools, infrastructure and healthcare*." Another respondent wrote, "*I put 'Disagree' because while it does fit the description from time to time, it doesn't fit it all the time. And when it doesn't, that weighs heavy. We need to stop with the 'status quo' and get creative and bold in deciding what to do next - and then just do it*."

DIVERSITY: Diversity and the role it plays in shaping Smyrna was also a topic that received attention from input participants. A participant in the Parent Focus Group said that they very much appreciate and value Smyrna's diversity in all its forms – racial, religious, income – because it teaches children how to get along with a lot of different people. However, some survey participants felt that the diversity in Smyrna, and particularly in the schools, is not considered an asset. Respondents wrote, "*[Smyrna needs to] embrace and celebrate the diversity it has instead of trying to ignore or hide it*" and "*I will likely not stay here because the area doesn't embrace diversity and is comfortable with not investing in their schools and people*."

PUBLIC SAFETY: Another aspect of quality of life in any community is safety. There was input regarding "pockets of crime," but overall, there was little discussion during focus groups and interviews regarding crime as an issue. Survey results also concluded that crime does not seem to be a major issue in Smyrna. Over 80 percent of respondents reported that they felt "safe" or "very safe" in their neighborhood and at the parks, dog parks, retail/grocery stores, and restaurants/bars in Smyrna. The data indicators mirror public input, and Smyrna's crime rate was lower than that of the statewide and national average. The violent crime rate was slightly higher than Cedar Park and Matthews, but it was significantly lower than the rate in Marietta. In 2012, Smyrna had a violent crime rate of 30.6 per 10,000 people, while Marietta's was 81.8 per 10,000 people. Furthermore, Smyrna had the second lowest property crime rate in 2012. Safety and low crime rates are top ranked quality of life aspects that people in every demographic look for in a community. **And, not only is Smyrna's crime rate lower than the comparison communities, it decreased by more than 30 percent between 2007 and 2012.**

The great amenities and quality of life aspects found in Smyrna are a defining factor for many families and people moving to Smyrna. Protecting and enhancing the things residents love about the City will be important to Smyrna's future as growth and development continue. These amenities should also be celebrated and incorporated into the messaging, branding, and reputation management of the City.

Continuing to invest in these kinds of amenities will attract and retain high-quality residents and companies.

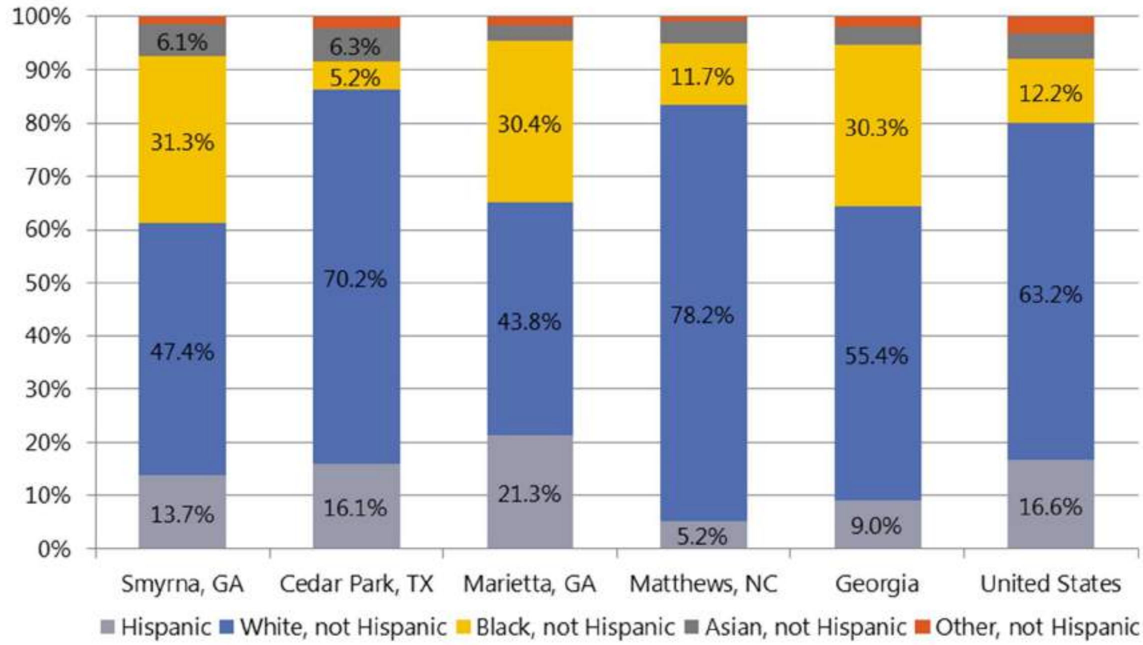
Population Growth and Composition

Smyrna's growth, development, education, and amenities are shaping its appeal to various demographic and socioeconomic groups. Given the attractiveness of the housing market, proximity to green space, opportunities to participate in many community events, the Market Village, and proximity to job centers, it is unsurprising that Smyrna is attracting a wide range of individuals and a very diverse population.

The United States is experiencing a demographic shift towards a majority-minority status. While the United States is not projected to be majority-minority until 2042, many communities, including Smyrna have already passed the tipping point. Smyrna's population is approximately 47.4 percent white, not Hispanic; 31.3 percent black, not Hispanic; 13.7 percent Hispanic; 6.1 percent Asian, not Hispanic; and 1.2 percent other, not Hispanic. Marietta is the only other comparison community where white, not Hispanic people account for less than 50 percent of the total population.

In terms of specific racial and ethnic minorities, Smyrna's black, not Hispanic population was larger than all the comparison communities; Marietta and Georgia followed with the next largest percentages of 30.4 and 30.3 percent, respectively. Smyrna also has a relatively large Asian population. The largest concentration, Cedar Park, had an Asian population of 6.3 percent, while Marietta had the lowest percentage at 2.9 percent. Smyrna makes up a larger percentage of Cobb County's population that is not white and/or not Hispanic. Although Smyrna's overall share of the County's population is 7.4 percent, it accounts for 8.2 percent of the County's Hispanic population, 9.3 percent of the African American population, and 9.9 percent of Cobb County's Asian population.

RACIAL AND ETHNIC COMPOSITION, 2012



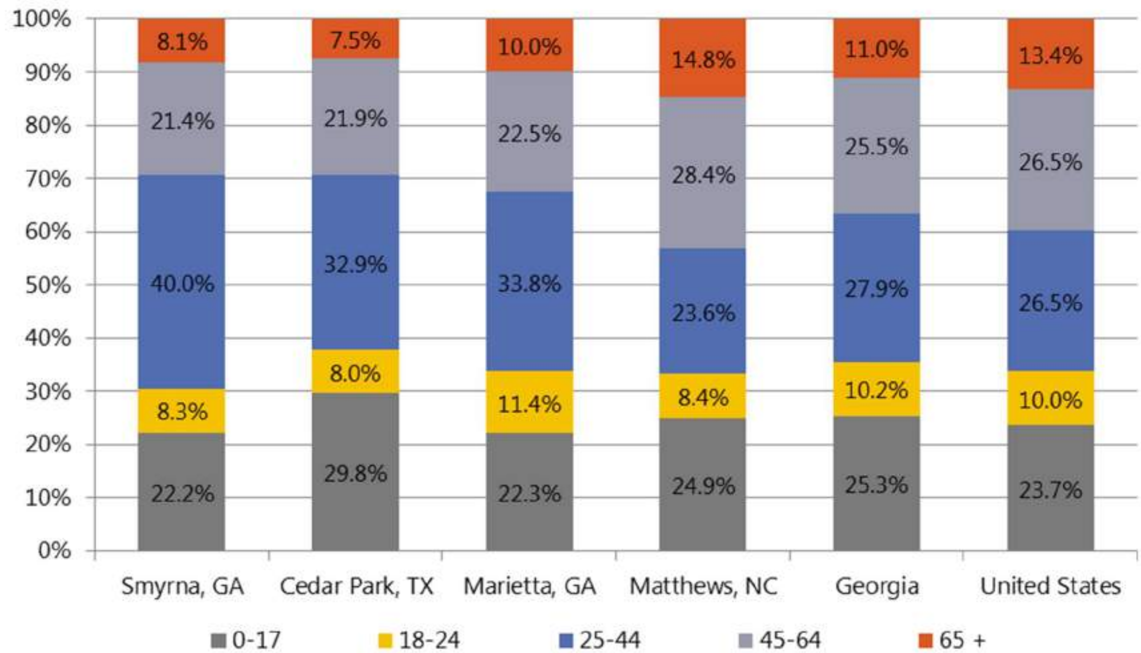
Note: Labels for percentages under 5 percent are omitted
Source: United States Census Bureau, American Community Survey, 3-yr Estimates

There were some concerns about the changing racial and ethnic make-up of Smyrna expressed by public input participants. Specifically, some respondents were concerned about the influx of the Hispanic population and its effects on the community, including from a language barrier standpoint. However, these fears may be unfounded as the concentration of Hispanics in Smyrna is not significantly larger than the other comparison communities. In fact, Marietta has the largest concentration of Hispanics with 21.6 percent of the population identifying themselves as Hispanic. The Hispanic population in Cedar Park accounts for approximately 16.1 percent of residents; statewide, approximately 9.0 percent of the population in Georgia is Hispanic. **Further, in Smyrna the Hispanic population decreased by 2.1 percent between 2007 and 2012, despite an increasing Hispanic population in Cobb County. None of the other communities reflect this dynamic.**

Looking at other racial and ethnic trends over the past five years reveals that Smyrna's black and Asian (not Hispanic) populations have driven City growth. Between 2007 and 2012, the black population increased by 21.9 percent and the Asian population increased by 32.3 percent. Concurrently, the white population grew by 10.2 percent. In Cobb County, the dynamics are different as the white population decreased and black and Asian populations accounted for smaller gains. **Overall, Smyrna is capturing growth from many different races and ethnicities, except the Hispanic population. Such diversity is a key strength for Smyrna and should be celebrated as the community reflects what a "new America" will look like.**

One the primary hallmarks of Smyrna is the younger population. The median age of residents is 34.2, which is far younger than the national average (37.3) and younger than Cobb County (35.6) and the Atlanta MSA (35.2), but in line with Marietta (34.3). Smyrna's age dynamics are driven by the large percentage of the population between the ages of 25 and 44, small percentages of young children, and small percentages of people over the age of 65.

AGE DISTRIBUTION, 2012



Source: U.S. Census Bureau, American Community Survey 3-yr. estimates

Public input respondents were asked if they would continue to live in Smyrna. Of the respondents aged 25 to 44, 63.1 percent said they would stay. This share is lower than those between the ages of 45 and 64 (70.1 percent). When asked why they would not continue to live in the community, young professional respondents mentioned the school system. As one respondent wrote:

"We are in the process of looking for houses in "better" school districts that are closer to where we work. We don't have any confidence in Campbell Middle or High Schools. We have some confidence in Teasley, but not enough to make us eager to send our kids there. It will break our hearts when/if we move from Smyrna, because we love it. We moved here from "in-town" right when we got married and have started our family here. We have roots and great relationships. We're involved in the community. But we don't want to take 'risks' with the education of our children, and we view the schools in Smyrna as risky enough that we are seeking other options."

However, public input participants recognize and believe that Smyrna is and will continue to be attractive for young professionals and families. Participants cited Smyrna's location and proximity to Atlanta as a prime attractor of younger families. When asked why they chose Smyrna, survey-takers between the ages of 25 and 44 wrote, *'We wanted a suburb that was close to our work in upper downtown Atlanta," "Smyrna is as close as you can get to the city without being in the city, and not so far from the city that the commute is awful," "Ability to walk to activities, parks, restaurants, library, etc. and it had a 'small town' feel,"* and *"Smyrna's proximity to town, Vinings and highways let us move farther away from Atlanta without leaving us feeling like we were disconnected from Atlanta. We really like the proximity to a variety of shops, restaurants and parks in Smyrna/Vinings and quickly we can be anywhere in the Metro."* Further, when asked if Smyrna is an attractive and desirable place to live for young professionals, 86.4 percent of respondents between the ages of 25 and 44 agreed. This share is the highest of all age groups surveyed.

Another distinguishing factor for Smyrna is that it is a destination for well-educated people. Over half of Smyrna residents have acquired a bachelor's degree or higher (52.2 percent). This is the highest of the comparison communities and is higher than Metro Atlanta (37.7 percent) and Cobb County (43.3 percent). Of the comparisons, Matthews had the second highest percentage within that educational attainment at 45.5 percent. Nationally, 28.6 percent of the population has achieved that level of education. Smyrna has been attracting higher-educated residents over the past five years and continues to cement itself as a community with a highly educated population.

However, many of the highly-educated people who migrate to Smyrna and hold a bachelor's degree or higher, tend to come from out of state. The share of residents who moved to Smyrna in the previous year from within Cobb County or from another Georgia county, were less likely to hold a bachelor's degree than existing residents. The opposite is true for migrants from outside of Georgia and abroad.

When educational attainment is parsed by race and ethnicity, disparities are apparent. The share of white not Hispanic persons with a bachelor's degree or higher (60.6 percent) is well above the Hispanic share (18.4 percent). Despite this disparity, nationally, 14.5 percent of Hispanics hold at least a bachelor's degree. So, on the one hand, Smyrna has a relatively well educated Hispanic base. On the other hand, the share of Hispanics with less than a high school diploma (31.4 percent) is higher than the national average (36.9 percent). Such a dynamic points to the fact that Smyrna is a destination for well-educated people, but there is still a disparity that is wider than the average American community.

The link between development and the people that it attracts is strong. In Smyrna, it is clear that the types of housing and amenities appeal to a young and diverse population. Many of the amenities that the Millenial generation seeks out are available in Smyrna. However, demographics and age distributions indicate that many people may not be considering Smyrna as a long-time community, especially as concerns over education are part of many young families' future considerations. Smyrna is a launching pad for young families and is viewed as a great place to start out, but many apparently feel that they outgrow Smyrna, either in terms of income, housing demands, or education opportunities. **Many communities would envy Smyrna's position and its attractiveness to young professionals and young families.** However, as shown in previous storylines, residents and stakeholders must candidly address the flight of families from the community and think anew about how to change that trajectory.

SMYRNA'S ECONOMIC LANDSCAPE

The Great Recession wreaked havoc on the American economic landscape and the long-term trends are still unraveling. While the official end of the recessionary period occurred in June 2009, many communities are just now regaining all the jobs that were lost. Further, the economic landscape in which communities find themselves continues to be hallmarked by uncertainty and the need to understand the dynamics that are currently shaping economic competitiveness is increasingly important.

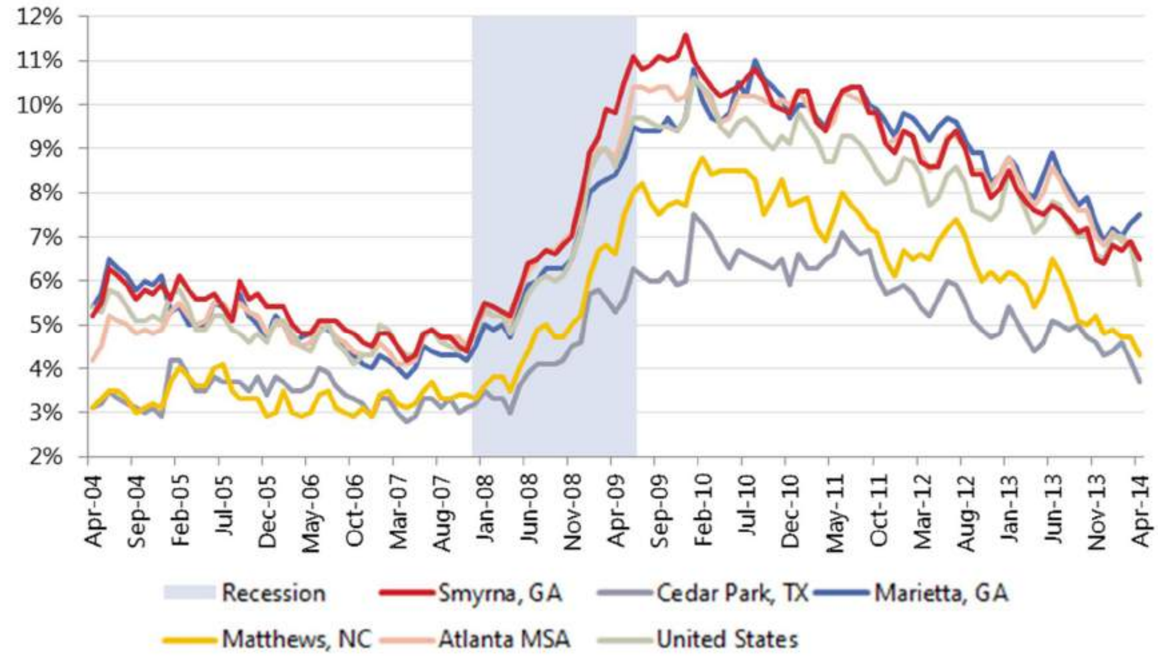
The United States lost almost nine million jobs between 2008 and 2010 in the worst economic recession that any living generation can remember. The national contraction accounted for a loss of 5.4 percent of all jobs. Just recently, in May 2014, the Bureau of Labor Statistics announced that the national employment level regained all the jobs lost during the recession. In other words, the United States has produced no new jobs in more than six years. The impact of the recession housing left many families stuck in their homes and the average American household lost over 25 percent of its wealth.

The severity of job losses was uneven as many communities experienced much greater contractions and others experienced less. In Metro Atlanta, over 252,000 jobs were lost over the recession years, accounting for a contraction of just over eight percent. Cobb County experienced a relatively larger contraction (10.2 percent) through a loss of over 35,000 jobs. In the Smyrna area, employment declined by 10.7 percent driven by a loss of 3,538 jobs.[5] These losses accounted for 9.7 percent of Cobb's total job loss, slightly higher than Smyrna's share of Cobb employment in 2009 (9.1 percent).

The Great Recession was particularly hard on residents of Smyrna, as many people lost jobs, but unemployment levels have fallen and currently show parity with Metro Atlanta. Of the comparison communities, Smyrna had the highest unemployment rate during the recession and its immediate aftermath. Unemployment peaked in December of 2009 at 11.6 percent. Since then, the rate has fallen 5.1 percentage points to 6.5 percent in April 2014. **This decrease is the largest of the comparison communities, pointing to the increasing strength of the labor market in Metro Atlanta and the skill sets of workers in Smyrna.** However, the strength of Austin, TX as a regional job creation engine is unrivaled as Cedar Park, TX has the lowest unemployment rate of the comparisons at 3.7 percent.

[5] In order to use the most recent employment data, zip codes were used to approximate Smyrna's geography. The zip codes that are included are 30080, 30081, and 30082.

UNEMPLOYMENT RATE, NOT SEASONALLY ADJUSTED, 2004-2014



Source: Bureau of Labor Statistics, Local Area Unemployment Statistics

All the economic data is contextualized by the broader tension between the suburbs and central cities for job creation. In the 1990s and 2000s, many companies and residents migrated to suburban places in search of cheaper commercial rents and land. The decentralization of jobs, which followed household migration to the suburbs, occurred across the nation and suburban communities more than 10 miles away from the central business district were the primary beneficiaries. This dynamic was halted by the Great Recession as employment declines were precipitous. As the Brookings Institution found, these losses were not shared evenly as suburban communities more than 10 miles from the central business district shouldered losses larger than their share of jobs between 2007 and 2010.[6] There is evidence that an inversion may be occurring as central cities are starting to attract more residents and many employers are vacating suburban locations to be closer to workers and urban amenities.

The Atlanta metropolitan area, comprised of 29 counties, is one of the most decentralized metros in the nation. The job dynamics reflect this as, in 2010, 64.6 percent of metro jobs were located between 10 and 35 miles from the central business district. Between 2000 and 2010, the share of jobs in suburban areas increased by 4.2 percentage points. However, just looking at the time frame of the Great Recession and its aftermath, generally between 2007 and 2010, the employment dynamics were slowed as the suburbs experienced larger losses than communities closer to the central business district.

[6] Kneebone, Elizabeth. "Job sprawl stalls: The Great Recession and the Metropolitan Employment Location." Metropolitan Policy Program at Brookings. April 2013.

Evidence of the inversion of the spatial location of jobs can already be seen in some major corporate moves from suburban communities to the central city. For example, in Atlanta, Coca-Cola, Porsche, NCR, athenahealth, and the Pulte Group have all relocated jobs from suburban communities. Other examples are evident in cities such as Chicago, which has seen movement back to the city by companies like United Airlines, BP, and Motorola.

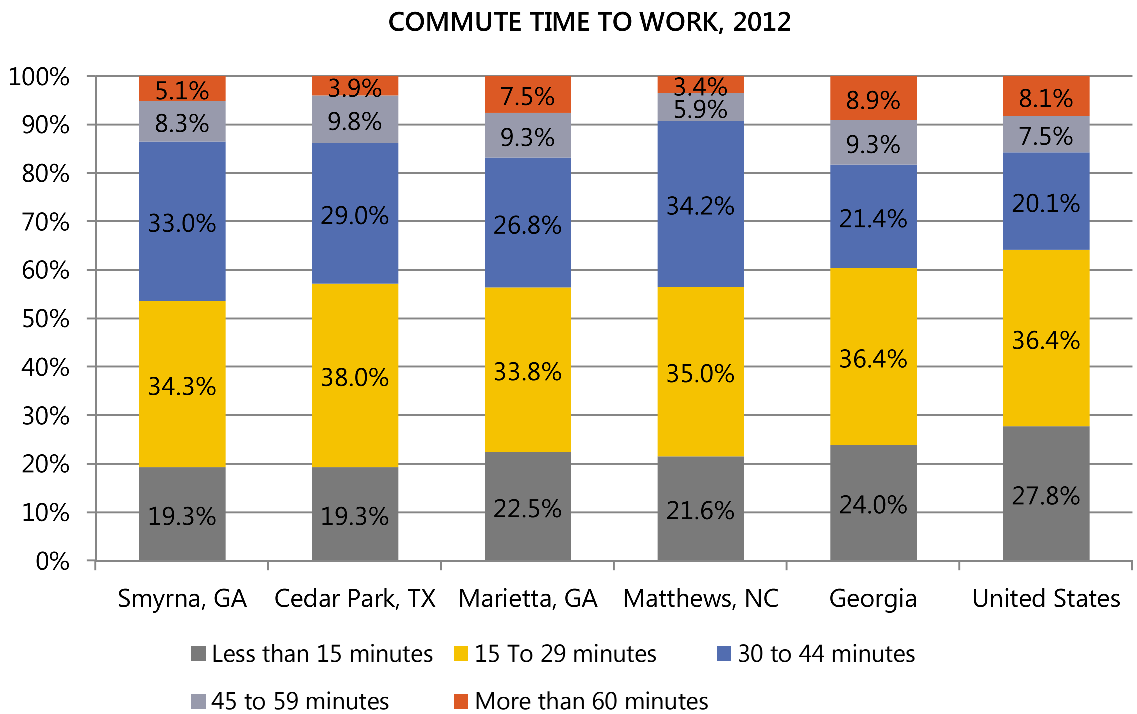
The implication for Smyrna is to define a position that can capture as much employment growth as possible without negatively impacting the sense of community and quality of life. Situated within a dynamic region with many municipalities vying for the same types of employers creates a situation where Smyrna must leverage its policy and development tools to differentiate its offerings. As the Brookings Institution writes, "Suburban development can take place in ways that foster dense, mixed-use, and regionally-connected job centers. Or it may occur in less dense and less accessible ways, raising challenges like strained infrastructure, increased energy consumption, greater spatial mismatches between the location of jobs and low-income and minority residents." Focusing on issues such as transportation, business retention, and local innovation can help keep the jobs that Smyrna has and attract new companies.

In 2013, Smyrna accounted for 9.2 percent of total Cobb County employment. Despite exaggerated job losses, Smyrna has maintained its relative share of Cobb County's employment. Between 2003 and 2013, this share only ranged from 9.1 percent in 2009 to 9.4 percent in 2004, 2005, and 2006. This level of employment is notable as Smyrna's population accounts for 7.4 percent of Cobb County's total population. The fact that Smyrna has a larger share of total Cobb County jobs than its relative share of population indicates that Smyrna is a jobs center. However, Smyrna's position as an employment hub is dwarfed by Marietta, the county seat, which accounts for 8.3 percent of population, but 44.1 percent of total employment. The presence of the Cobb County Schools, Lockheed Martin, and WellStar Kennestone Hospital supports Marietta as a key jobs center in Cobb County. The relative stability of employment levels in Smyrna is an important dynamic that not only impacts the desirability of the city to residents, but impacts the fiscal sustainability of the city as well.

Despite being home to a decent share of total county jobs, residents tend to work in other places in the Metro. Of the workers who live in Smyrna, 48.6 percent work in Cobb County and only 17 percent work in Smyrna. In contrast, of the workers in who live in Marietta, over 65 percent work in Cobb County and 30 percent work in the City of Marietta. In Cedar Park and Matthews, 22.6 percent and 21.7 percent of respective workers live and work in those cities. Workers in Smyrna are seeking out larger employment hubs as the largest shares of workers are commuting to jobs in the cities of Atlanta, Sandy Springs, and Marietta. This suggests that the jobs in Smyrna do not align with residents' skills, a key economic opportunity found in the final storyline.

The commuting patterns of Smyrna residents, primarily beyond the City and County's borders, are reflected in elevated commute times. The median commute time for Smyrna residents in 2012 was 27.3 minutes – the highest of all comparison communities. Marietta's median commute time (26.6 minutes) is shorter than Smyrna's, a likely reflection of Marietta's position as a larger employment center. In terms of long commutes, Marietta has a larger percentage of commuters that traveled more than 45 minutes (16.8

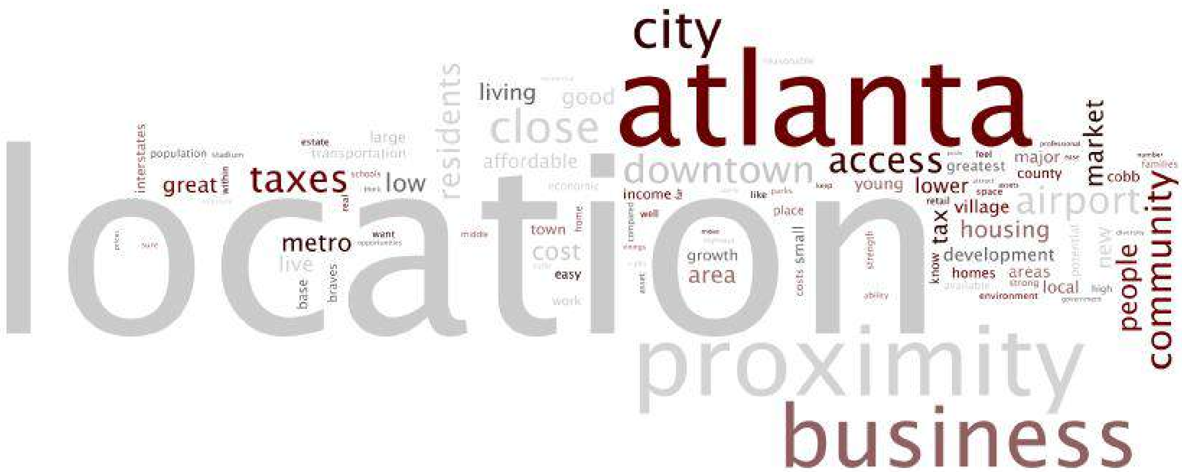
percent) than Smyrna (13.4 percent), underscoring the value of Smyrna's proximity to Atlanta and many other employment centers.



Source: U.S. Census Bureau, American Community Survey, 3-yr Estimates

Smyrna must seek to maximize its local economic assets and minimize the challenges. Survey respondents, who identified as being able to comment on the quality of the business climate, were asked about the economic strengths and weaknesses of Smyrna. As shown in the following graphic Smyrna's location is a prized economic asset as it is strategically close to Atlanta. The Metro offers businesses access to a very deep labor pool, air and interstate connectivity to major national and international cities, a large consumer base, and a strong concentration of corporate headquarters.

SURVEY RESULTS: WHAT IS SMYRNA'S GREATEST ECONOMIC STRENGTH?



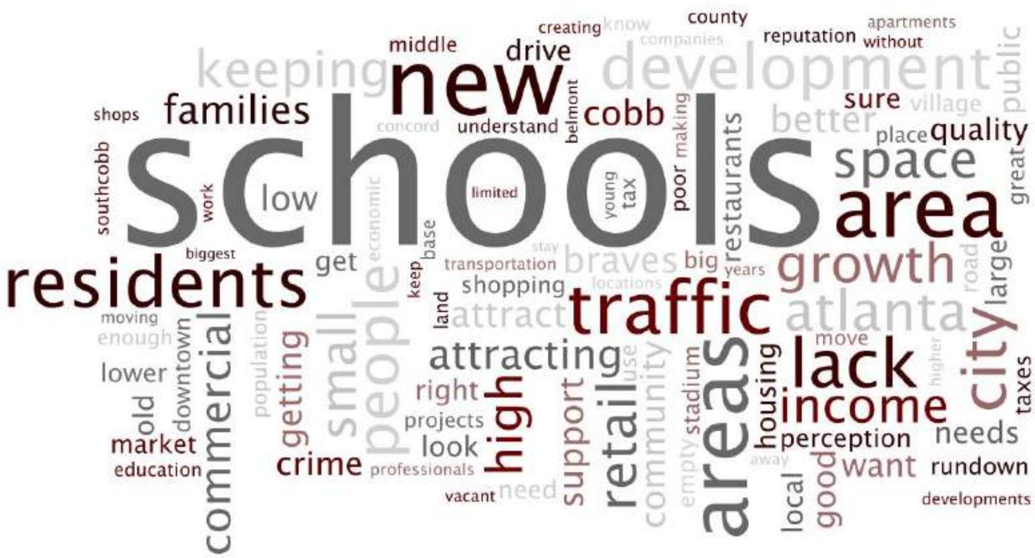
Note: Words are scaled based on their frequency of mention by survey respondents with more frequently mentioned words shown in larger font.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

There is no doubt that Smyrna resides in a competitive location. With major operations of IBM, United Distributors, Glock, Bake One/Atlanta Bread Company, and Kenny's Great Pies located in the City, there is clearly an economic argument for Smyrna. Further, nearby economic engines, such as the headquarters of Home Depot and the Cumberland Community Improvement District (CID) validate the competitiveness of Smyrna's location.

As with any discussion of the economic viability of a location, traffic, congestion, ingress, and egress are major concerns. **Smyrna's proximity to one of the area's largest office markets, Cumberland/Galleria, and ease of access to other large office markets, such as Central Perimeter, is a defining competitive factor. However as can be seen in the following graphic, there is concern about the economic effects of increasing traffic. If the area around I-75 and I-285 becomes further congested due to future office demand and the Braves development, Smyrna's appeal could erode quickly.** Smyrna will need to be aggressive with transportation considerations as it continues to protect and enhance its economic vibrancy and quality of life.

In terms of economic challenges and weaknesses, as shown in the following graphic, the one word that stands out above others is "schools." **The fact that the respondents to this question, who identified as being able to comment on the business climate, identified the same primary challenge for the local economy as all of the survey respondents identified for the community at-large is not a coincidence.** Without a doubt, Smyrna business stakeholders understand the connection between quality public education and the ability of a community to compete for jobs. While policy decisions and strategic direction are set by Cobb County Schools, public input participants said that there has not been a concerted effort or vocal demand by the business community to improve the quality of education in the schools in Smyrna. Finding ways to affect change in the schools will be an important part of Smyrna's future, full recognizing the statutory limitations.

SURVEY RESULTS: WHAT IS SMYRNA'S GREATEST ECONOMIC CHALLENGE?



Note: Words are scaled based on their frequency of mention by survey respondents with more frequently mentioned words shown in larger font.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

Taken together, Smyrna's economic situation is one that is influenced by a myriad of factors. However, the way forward must be focused on those things that the City and its residents can change. Without a unified front and consensus about the economic future, many opportunities will be lost to inertia. There is great hope for Smyrna, especially as plans for new development are underway. The following graphic shows responses about Smyrna's best economic opportunities and clearly reflects optimism regarding catalyst development projects, such as the Braves stadium, Jonquil Plaza, and the Belmont property. Words, including "fiber," "retail," "and "restaurants" further connect economic development with quality of life concerns and provide insights as to how Smyrna can continue to support its economic position.

SURVEY RESULTS: WHAT DO YOU THINK IS THE GREATEST ECONOMIC OPPORTUNITY FOR THE CITY OF SMYRNA?

Note: Words are scaled based on their frequency of mention by survey respondents with more frequently mentioned words shown in larger font.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

LOOKING TO THE FUTURE: ECONOMIC OPPORTUNITIES

The severity of the Great Recession was not equal across the nation. Communities dependent on highly cyclical sectors such as business services, manufacturing, real estate, tourism, and retail were likely to be severely affected, than those with greater dependence on agriculture, natural resource extraction, and health care. Further, communities and regions with diverse economies, and economies that have good matches between local residents' skills and jobs are able to better withstand traumatic economic events. Of course, Smyrna's economy does not function in a vacuum, but is influenced by many dynamics including those of the national, state, regional, and county levels.

In 2013, the Smyrna area had just over 32,000 jobs.[7] This level represents a decrease of about one percent over the previous five years and growth of 3.1 percent over the previous 10 years. **As shown in the following chart, the largest sectors of economic activity are wholesale trade (13 percent), construction (11.4 percent), health care and social assistance (11.2 percent), professional, scientific, and technical services (10.7 percent), retail trade (10.7 percent), and accommodation and food service (10.4 percent).** Collectively, these sectors account for 67.3 percent of Smyrna's total employment.

One of the common measures of economic competitiveness is a location quotient (LQ). The LQ is an indicator of employment concentration and is the ratio of a sector's share of total local employment to that same sector's share of total national employment. If a business sector has a location quotient greater than one, it is said to be more concentrated in a given area than the United States as a whole. If the location

[7] The Smyrna area is comprised of the zip codes 30080, 30081, and 30082.

quotient is less than 1.0, it is under-concentrated. **The most heavily concentrated sector in Smyrna is whole sale trade (LQ=3.3), meaning there are three times as many jobs as would be expected in the average American community.** The other highly concentrated sector, management of companies (LQ=2.2), which is often a proxy for headquarters operations, indicates the presence of corporate employers and a relative competitiveness for white-collar positions.

SMYRNA AREA EMPLOYMENT, 2003-2013

	Employment, 2013			Change 2003-2013			Smyrna Wages, 2013	
Sector	Total	Pct. of Total	LQ	Smyrna #	Smyrna %	US %	Average Annual	Pct. of U.S.
Total Employment	***32,214***	***100%***	***1.0***	***973***	***3.1%***	***4.2%***	***$59,441***	***102.8%***
Agriculture, Fishing, and Hunting	16	0.0%	0.0	(6)	-27.3%	-2.9%	$42,014	133.6%
Mining and Oil/Gas Extraction	--	0.0%	0.0	--	--	64.9%	$75,276	66.3%
Utilities	120	0.4%	1.0	67	126.4%	-4.6%	$122,584	95.6%
Construction	3,672	11.4%	2.2	(897)	-19.6%	-12.4%	$62,233	115.5%
Manufacturing	1,157	3.6%	0.4	(114)	-9.0%	-17.4%	$56,345	74.4%
Wholesale Trade	4,192	13.0%	3.3	(91)	-2.1%	2.0%	$90,493	115.0%
Retail Trade	3,420	10.6%	1.0	(446)	-11.5%	1.0%	$38,625	117.1%
Transportation and Warehousing	597	1.9%	0.6	(23)	-3.7%	6.8%	$56,378	98.3%
Information	413	1.3%	0.7	(245)	-37.2%	-15.5%	$93,756	95.8%
Finance and Insurance	862	2.7%	0.7	(8)	-0.9%	-1.4%	$84,038	80.4%
Real Estate and Rental and Leasing	599	1.9%	1.1	(235)	-28.2%	-4.2%	$58,238	112.9%
Professional, Scientific, and Tech. Svcs	3,463	10.7%	1.7	753	27.8%	18.7%	$88,522	99.2%
Management of Companies	934	2.9%	2.1	478	104.8%	22.9%	$132,445	102.4%
Administrative and Other Services	2,215	6.9%	1.1	108	5.1%	11.3%	$39,394	101.2%
Educational Services (Private)	453	1.4%	0.6	81	21.8%	26.1%	$33,753	77.0%
Health Care and Social Assistance	3,597	11.2%	0.9	1,207	50.5%	22.7%	$54,315	100.0%
Arts, Entertainment, and Recreation	514	1.6%	1.0	28	5.8%	12.8%	$20,431	57.3%
Accommodation and Food Services	3,341	10.4%	1.3	280	9.1%	16.6%	$18,522	88.0%
Other Services (not Public Administration)	1,367	4.2%	0.9	(20)	-1.4%	3.9%	$25,607	90.1%
Government	1,142	3.5%	0.2	(39)	-3.3%	1.3%	$60,157	88.4%

Note: Geographic area for Smyrna is made up of zip codes 30080, 30081, and 30082. LQ is the abbreviation for 'location quotient,' which is an indicator of employment concentration. It is the ratio of a sector's share of total local employment to that same sector's share of total national employment. If a business sector has a location quotient greater than one, it is said to be more concentrated in a given area than the United States as a whole. If the location quotient is less than 1.0, it is under-concentrated. Color coded circles are as follows: LQ>1.1 is green; LQ<.09 is red; LQ between .09 and 1.1 is yellow.
Source: EMSI

In terms of growth and decline, the Smyrna area experienced positive job growth over the past 10 years, but the pace of growth has lagged the nation. The Smyrna area added just fewer than 1,000 jobs between 2003 and 2013, accounting for growth of 3.1 percent. While national employment growth was slightly stronger (4.2 percent), employment growth in the Smyrna area was on par with Cobb County's growth over the decade (3.2 percent). The two sectors that provided the largest shares of job growth during this period were health care and social assistance (added 1,207 jobs) and professional, scientific, and technical services (added 753 jobs). The growth in these sectors in the Smyrna area outperformed growth at the national level and in Cobb County (growth rates of 10 and 40 percent respectively). **Also, the increase in management of companies (104.8 percent) far surpassed national gains.** It should be noted that many of the gains that were made in these sectors were offset by losses in the construction and retail sectors.

The downturn in construction, which can be traced to the Great Recession, was more severe in Smyrna (contraction of 19.6 percent) than the national average (contraction of 12.4 percent), but resisted the broader losses experienced at the County level (contraction of 23.8 percent). I**n terms of retail, the Smyrna area is still not back to 2003 levels of employment, following depressed consumer spending during the Great Recession.**

The most recent three years of economic data paint a more positive picture of employment. The Smyrna area has gained upwards of 2,500 jobs, accounting for growth of 8.8 percent. This rebound is stronger than the progress made at the national level (3.8 percent) and a percentage point higher than Cobb County's employment increase (7.8 percent). Again, many of the sectors that have been growing are the professional and health services. Retail and construction, which have declined over the past decade, have both posted positive gains over the past three years, contrasting the trend of continued losses at the national level.

Digging a little deeper into the occupational mix of the larger economic sectors yields further confirmation that the Smyrna area is a hotspot for knowledge-based employment. In the professional, scientific, and technical services, the core of the occupational mix in the Smyrna area is primarily oriented toward technology, rather than support functions. Occupations that fall into the category of "computer occupations," and include functions such as computer systems analysts, computer programmers, and software developers, account for almost 30 percent of the sector, while at the national level, they account for 15 percent. Even the wholesale sector, which accounts for 13 percent of employment in and around Smyrna, has higher shares of sales representatives, top executives, and business operations specialists than found at the national level. There are fewer material moving workers, motor vehicle operators, and other labor-oriented occupations in the Smyrna area than would be expected based on the national occupational mix. These dynamics mirror those of Cobb County's niche in the wholesale sector, as jobs are primarily oriented around sales functions, rather than moving materials. **Overall, the mix of jobs reflects employment of higher skilled and professional workers, a positive trend as many communities are actively seeking these kinds of companies out.**

As mentioned previously, economic strength often hinges on the compatibility of the local workforce and the jobs in a community. The following chart shows the sectors in which residents of Smyrna are employed and the distribution of jobs within Smyrna. The right column shows the difference in percentage points. Positive numbers, shown in green, indicate where the share of residents employed in a field is higher than the share of those jobs in Smyrna, a proxy for economic opportunity. **The sector that seems most ripe for additional capacity and expansion is the professional, scientific, and technical services sector as many residents work in the field, but do not do so in Smyrna.**

A special note should be given to wholesale trade as many of Smyrna's jobs are in this sector, but fewer residents actually work in these companies. The fact that these tend to be higher paying and white-collar jobs indicates that they could be a good fit for residents as well. As will be discussed, these sectors should be the core of the economic development program pursued by the City and in concert with Cobb County and Metro Atlanta's targeting programs.

RESIDENT EMPLOYMENT AND LOCAL JOB DISTRIBUTION, 2012

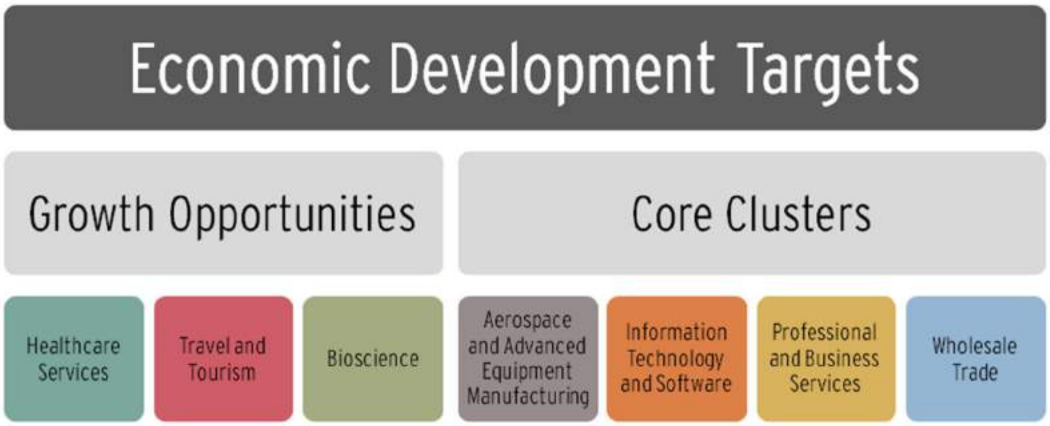
Sector	Resident employment by sector	Smyrna area job distribution	Difference
Agriculture, Forestry, Fishing and Hunting	0.0%	0.0%	(0.05)
Mining, Quarrying, and Oil/Gas Extraction	0.0%	0.0%	-
Utilities	0.2%	0.4%	(0.14)
Construction	5.0%	11.4%	(6.36)
Manufacturing	6.9%	3.6%	3.32
Wholesale Trade	4.6%	13.0%	(8.43)
Retail Trade	11.4%	10.6%	0.79
Transportation and Warehousing	4.7%	1.9%	2.88
Information	4.1%	1.3%	2.85
Finance and Insurance	5.4%	2.7%	2.70
Real Estate and Rental and Leasing	2.4%	1.9%	0.52
Professional, Scientific, and Technical Svcs	14.8%	10.7%	4.10
Management of Companies and Enterprises	0.1%	2.9%	(2.75)
Administrative and Other Services	4.2%	6.9%	(2.68)
Health Care and Social Assistance	10.8%	11.2%	(0.38)
Arts, Entertainment, and Recreation	0.6%	1.6%	(1.03)
Accommodation and Food Services	8.0%	10.4%	(2.39)
Other Services (not Public Administration)	3.8%	4.2%	(0.40)

Note: Cell shading is based on range of percentages with red corresponding to lower numbers and green corresponding to higher numbers.
Source: U.S. Census Bureau, American Community Survey 3-yr estimates and EMSI

The economic development strategy of targeting economic activity has become increasingly widespread over the years as local and regional economies attempt to capitalize on their strengths and competitive advantages. Targeting strategies build on the expertise and specializations of regional labor pools, infrastructure, and connections between suppliers and buyers. These advantages, coupled with the network effects that exist within business clusters, often result in comparatively high potential for employment growth and wealth creation. **Due to limited economic development resources, it is sensible for regions to target the few sectors with the greatest competitive advantages, and thus, the greatest potential to create new jobs, retain existing jobs, and raise incomes.**

Within this context, it makes sense for Smyrna to work with organizations that are actively pursuing diversified targeting strategies. Cobb County's collaborative economic development program, Cobb EDGE, has identified seven target sectors in which they are actively seeking to recruit new companies, retain and expand existing companies, and grow new ones through entrepreneurship and small business support. Working with Cobb County and Cobb EDGE as well as other economic development entities, Smyrna should work to understand how its business assets fit and complement countywide, and regional, assets in order to make strategic investments. In other words, the economic development paradigm must reflect a "think regionally, but act locally" mindset.

COBB EDGE ECONOMIC DEVELOPMENT TARGETS



Source: Cobb EDGE and *Market Street Services*

The following table provides an overview of how the Cobb County targets can be applicable to Smyrna's assets and competitive position. Based on input and economic analysis it is likely that other areas in Cobb County will likely capture the bulk of opportunities related to healthcare services, bioscience, and aerospace. However, the other targets are strong fits for Smyrna and should offer opportunities for new business growth and expansion.

Many public input respondents provided thoughts and ideas about opportunities that could help increase the economic position of Smyrna. Participants in the Smyrna Technology Initiative focus group and the small business focus group identified opportunities related to stronger support systems for entrepreneurs and tech talent. Potential opportunities such as developing a technology incubator, better connections to Southern Polytechnic State University and Chattahoochee Technical College, and increased support for downtown businesses were mentioned. One respondent wrote that Smyrna should *"figure out how to best leverage an ultra-modern internet infrastructure (Google fiber) by adding what information workers want: mass transit, high quality entertainment and living."* There is no doubt that technology and cutting-edge businesses are at the forefront of many stakeholders' vision for the future of Smyrna.

COBB EDGE TARGET SECTORS AND SMYRNA'S ASSETS

	Smyrna's Level of Competitiveness			Smyrna's characteristics implacting competitiveness		
	Very competitive	Somewhat competitive	Not competitive	Assets	Opportunities	Challenges
Healthcare Services		X		Ridgeview Institute Emory Adventist Hospital	Medical vendors, suppliers, wholesale operations	Limited medical office space and presence of larger health systems nearby
Travel and Tourism	X			Youth sport facilities Braves stadium development	Attraction of youth sports tournaments and development that complements Braves entertainment district	Uncertainty of the range of the "halo effect" of the Braves development and bid process for tournaments
Bioscience			X	Proximity to Emory, Centers for Disease Control, Georgia Tech Inovation Crescent	Limited wholesale and regional administrative fucntions	Lack of R&D, wet lab space,testing labs and bio manufatcuring
Aerospace and Advanced Equipment Manufacturing			X	Proximity to Lockheed Martin and Dobbins Air Reserve Base	Back-office and administrative functions for suppliers	Lack of heavy manufacturing sites or R&D facilities
Information Technology and Software	X			Strong concentration of tech occupations Smyrna Technology Initiative Inventory of office space	Marketing Smyrna as a technology hub, building awareness of a niche, connecting businesses and nearby higher ed, and Google Fiber.	Lack of an established incubator or accerlator facility, lease rates may be too high for young companies, lack of critical mass of tech companies
Professional and Business Services	X			Highly educated residents Proximity to 2- and 4-year degre programs Inventory of office space	Small and medium firm expansion and attraction along with small business. Gigabit internet could differenitate form other markets.	Differentiation of local market and lack of Class A office space
Wholesale Trade	X			Concentration of "white collar" and service jobs in sector Inventory of office/warehouse space Interstate access	Additional wholesale firms, especially those in the electronics, re-commerce, and other high-value niches	Technological disruption and lack of multiple sites for distribution

Source: Cobb EDGE and *Market Street Services*

As was made clear in the storyline about quality life, one of the primary opportunity areas for increasing livability and local amenities is improved shopping and dining options. Of course, wanting these kinds of amenities and actually bringing them to Smyrna are two separate things. However, the intersection of retail and economic growth will continue to strengthen as more people will be attracted to the general area because of the Braves stadium and residents increasingly do not want to travel to other cities for retail. As one respondent wrote, *"I think the Braves coming to Cobb creates an excellent opportunity for the City to take advantage of the additional revenue that can be generated from that venue. Specifically, I think strategically improving/upgrading our roadways, infrastructure and facilities, and providing adequate high end lodging, dining, entertaining and shopping would be very wise to take the most advantage of this unique opportunity."*

The following chart shows a high-level snapshot of retail leakages and surplus. Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business. Conversely, a surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. Of course, just because a leakage can be identified does not mean there is a specific need for those kinds of stores. Smyrna's location provides easy access to many shopping opportunities, so the following analysis should be used to broadly understand the types of stores that may be good fits for Smyrna.

LEAKAGE/SURPLUS INDEX BY MAJOR STORE TYPES, 2014

Note: Leakages are indicated in red and surpluses are indicated in green.
1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.
0.80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.
1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.
Source: Buxton

Perhaps the largest takeaway from the retail leakage analysis, which aligns well with quality of life concerns, is that residents are spending more in foodservice and drinking places outside Smyrna than inside. When asked to identify the "reasons and/or destinations that you frequently leave Smyrna for," 67.6 percent of respondents checked "restaurants or cafes," the highest of all question items. Local businesses are also not capturing as much spending related to health and personal care and furniture and home furnishings. Digging a little deeper into the data reveals that Smyrna residents spend more at special food service places, drinking places, computer and software stores, specialty food stores, shoe stores, men's clothing stores, children's clothing stores, and florists located in other places than in Smyrna.

The role of retail in bolstering quality of life is strong. However, while retail jobs have declined in Smyrna over the past 10 years, the Braves development will bring new market demand to the area. Leveraging this pressure to capture new retail tax revenues and increase the quality of life will be important. **However, as development, growth, and increased market demand increase, the potential for traffic and congestion increases as well, impacting quality of life. Looking to the future, Smyrna will need to stake out its position as it best balances growth, quality of life, and economic vibrancy.**

CONCLUSION

There is little doubt that now is the time for action. These storylines present a comprehensive analysis of Smyrna and provide a common base of knowledge for residents, stakeholders, and leaders to think about what needs occur over the next 10 years in order to create Smyrna's desired future.

The storylines also reinforce and support each other. Together they present the real strengths, opportunities and weaknesses of Smyrna. However, they are also a call to action as the community's vision must rise from the community. The following graphic shows the key words that public input respondents identified when asked to provide a vision statement for the community.

SURVEY RESULTS: IF YOU HAD TO WRITE A VISION STATEMENT FOR SMYRNA, WHAT WORDS AND PHRASES WOULD YOU INCLUDE?

Note: Words are scaled based on their frequency of mention by survey respondents with more frequently mentioned words shown in larger font.
Source: *Market Street Services;* Smyrna's Community Vision Plan Survey (2014)

The future of Smyrna, as it touches development, education, quality of life, employment, and other community characteristics, must continue to shape and reinforce the feeling of community. Residents are seeking out Smyrna because of the quality of life that it offers and the sense of community that abounds. There are specific challenges that work against catalyzing additional community attachment, including education, development patterns, and congestion. However, addressing these in the context of building community, preserving the quality of life, and aggressively planning for the future, must be a hallmark for Smyrna.

The next phase in this process is about turning these findings into action steps. The development of Smyrna's Vision and the implementation of the Vision Plan must be a part of how Smyrna addresses its future. The importance of this process is not lost on residents as one stakeholder summed it up, *"The implementation of the Vision Plan should be a systemic, ongoing part of Smyrna's governing process. The Vision Plan needs to be a living, breathing thing. This process can't be seen as just an exercise."*