Livable Buckhead

2022 State of Buckhead Study

Report of Findings

December 2022

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Research objectives and methodology

- After conducting a State of Buckhead survey in 2020, Livable Buckhead wanted to bring that survey forward to measure changes on key issues, as well as gather opinions and feedback from Buckhead residents, businesses and employees on topical, relevant issues:
  - What is the current profile of those residing in and/or working in Buckhead?
  - What are the current perceptions of Buckhead among residents, businesses and employees?
  - What do these audiences see as the biggest issues facing Buckhead?
  - How engaged are individuals with their communities? With sustainability initiatives?
  - What parks and greenspace initiatives would be most popular?
  - How likely are individuals to use proposed or established initiatives like HUB404, PATH400, and the Buc shuttle?
  - What type of commute do residents and workers face? What modes of transportation do they use and are they interested in alternative means of getting to work?
  - How frequently are individuals working from home?

- An online survey was fielded from 9/7/22 through 9/28/22. The survey was sent directly to individuals in Livable Buckhead's database and shared with a broader audience of Buckhead stakeholders via a public link included in media stories and shared by other Buckhead organizations. The survey yielded 2,847 completed interviews, which provides an average margin of error of ± 1.8% at a 95% degree of confidence.

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Executive Summary

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Five key takeaways from the research

1. Perceptions of Buckhead are improving across all issue areas. The three with the greatest improvements were: being a safe place to live, Buckhead leadership, and the City being responsive.

2. Crime remained the primary concern in 2022, but perceptions of safety have improved materially since 2020.

3. Buckhead is still felt to be a prestigious destination which offers great proximity to the best shopping and restaurants and is a great place to raise a family because of its access to the best schools.

4. Similar to 2020, additional crime prevention measures, road maintenance, and pedestrian safety/sideway improvements were considered the three most important improvements to be made.

5. Commutes have changed. In 2020, two of five anticipated working from home at least three days a week once things returned to normal; in 2022, the reality is just over half worked from home at least three days a week.

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Respondent Profiles

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Audience definitions

All 2022 respondents (n=2,847 Average MoE ± 1.8%)

All 2020 respondents (n=2,362 Average MoE ±2.0%)

2022 Buckhead residents (n=2,319 Average MoE ± 2.0%)
Either live in Buckhead or live and work in Buckhead

2020 Buckhead residents (n=1,870 Average MoE ± 2.3%)
Either live in Buckhead or live and work in Buckhead

Buckhead workers (n=1,311 Average MoE ± 2.7%)
Either work in Buckhead or live and work in Buckhead

2020 Buckhead workers (n=1,118 Average MoE ± 2.9%)
Either work in Buckhead or live and work in Buckhead

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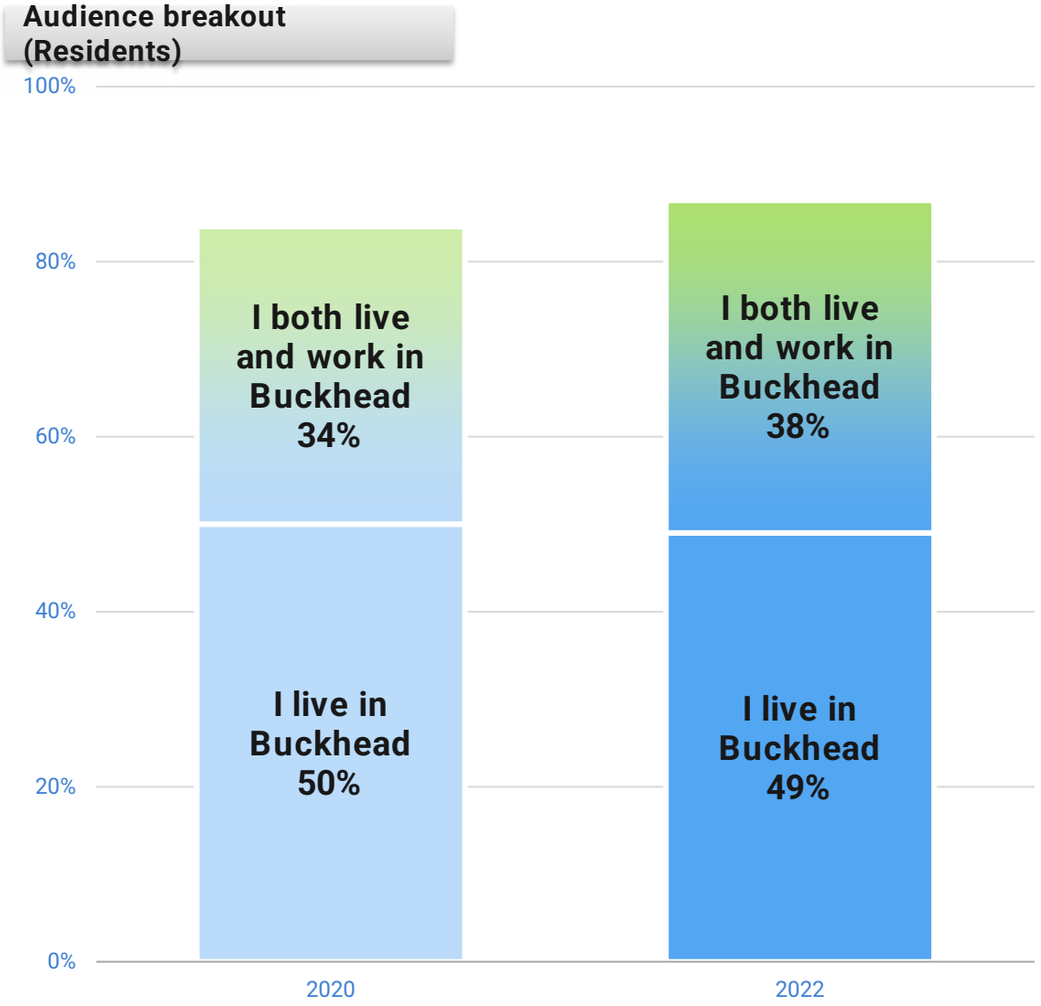
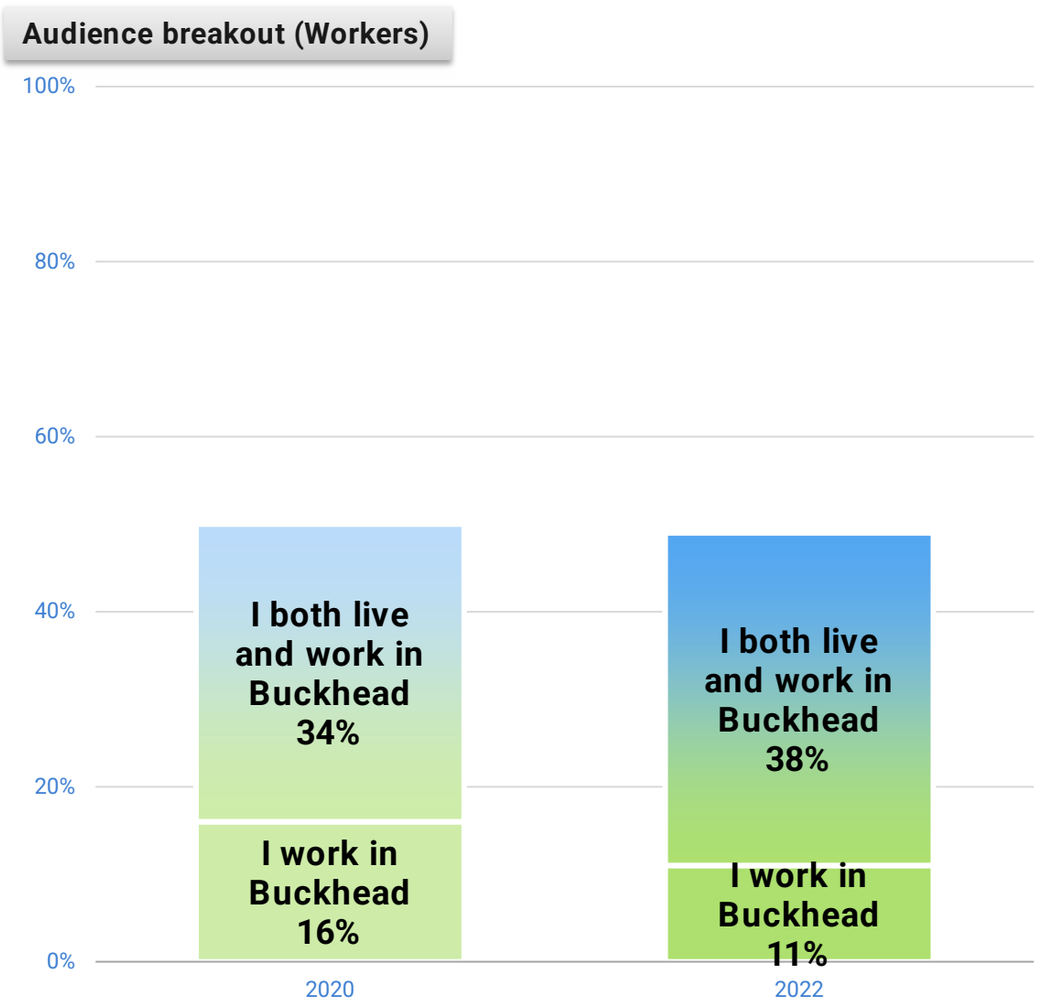
Similar to 2020, the overwhelming majority of the sample consisted of Buckhead residents





Q2 Which of the following best describes you?

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With the exception of gender, the sample demographics remained consistent from 2020 to 2022

		2022 Respondents	Buckhead Demographics (Census Data)	2020 Respondents
Gender	Female	49%	52%	63%
	Male	50%	48%	36%
Age	18-24	2%	9%	3%
	25-34	14%	25%	16%
	35-44	21%	19%	17%
	45-54	22%	14%	26%
	55-64	19%	13%	23%
	65+	21%	20%	16%
	Average	51.5	46.8	49.6
Household income	<$50K	7%	18%	4%
	$50K-$99K	27%	23%	18%
	$100K-$199K	23%	29%	30%
	$200K+	43%	30%	48%
	Average	$234,405	$190,149	$258,409
Children at home		39%	18%	33%
Race/ethnicity	White/Caucasian	83%	65%	87%
	Black/African American	6%	13%	5%
	Hispanic/Latinx	3%	7%	3%
	Asian	3%	7%	3%
	All others	5%	10%	3%
Education	Less than college	15%	18%	6%
	College	45%	48%	55%
	Post-graduate	40%	34%	39%

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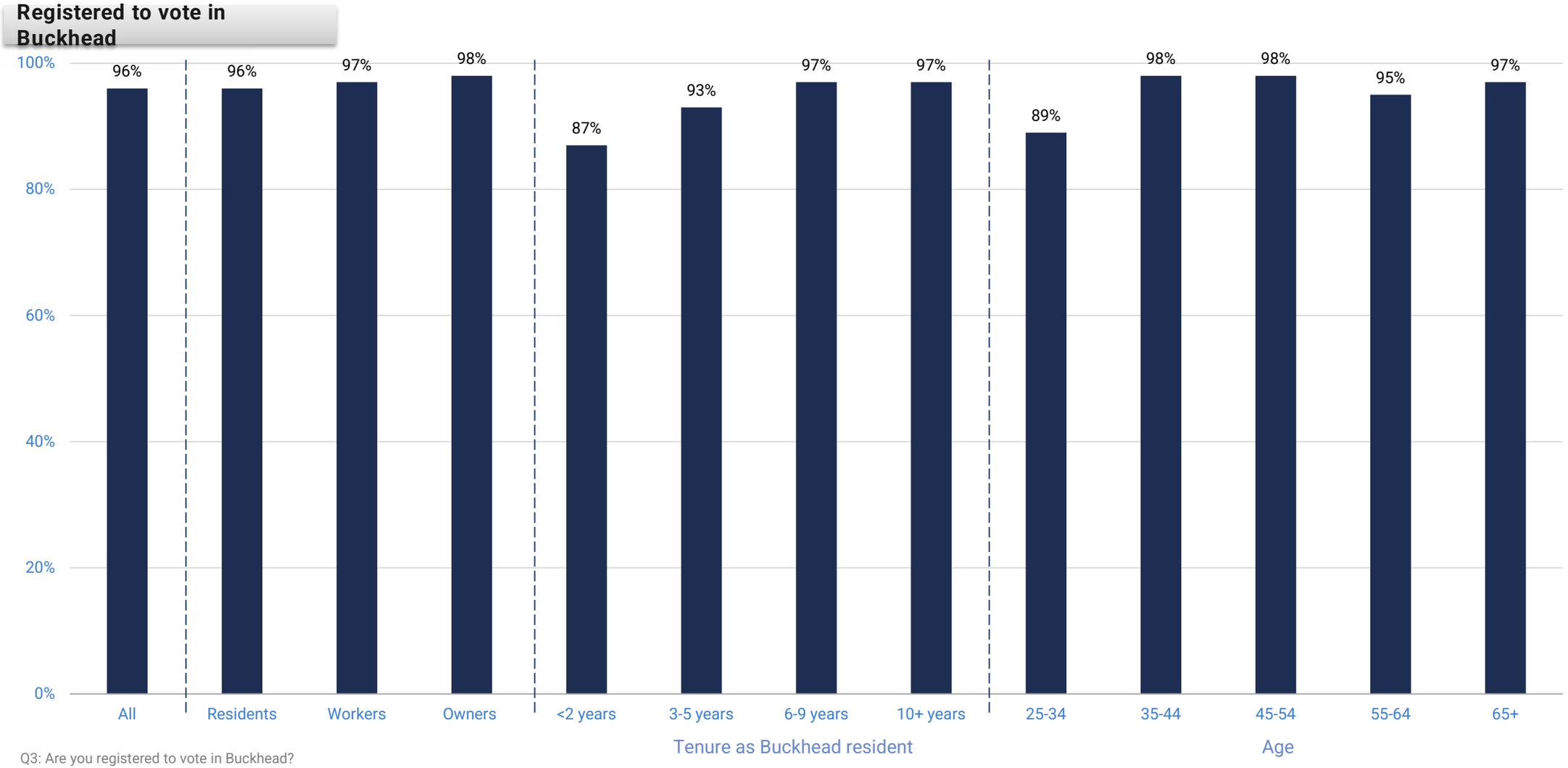
For each audience, nearly every respondent is registered to vote in Buckhead



Q3: Are you registered to vote in Buckhead?

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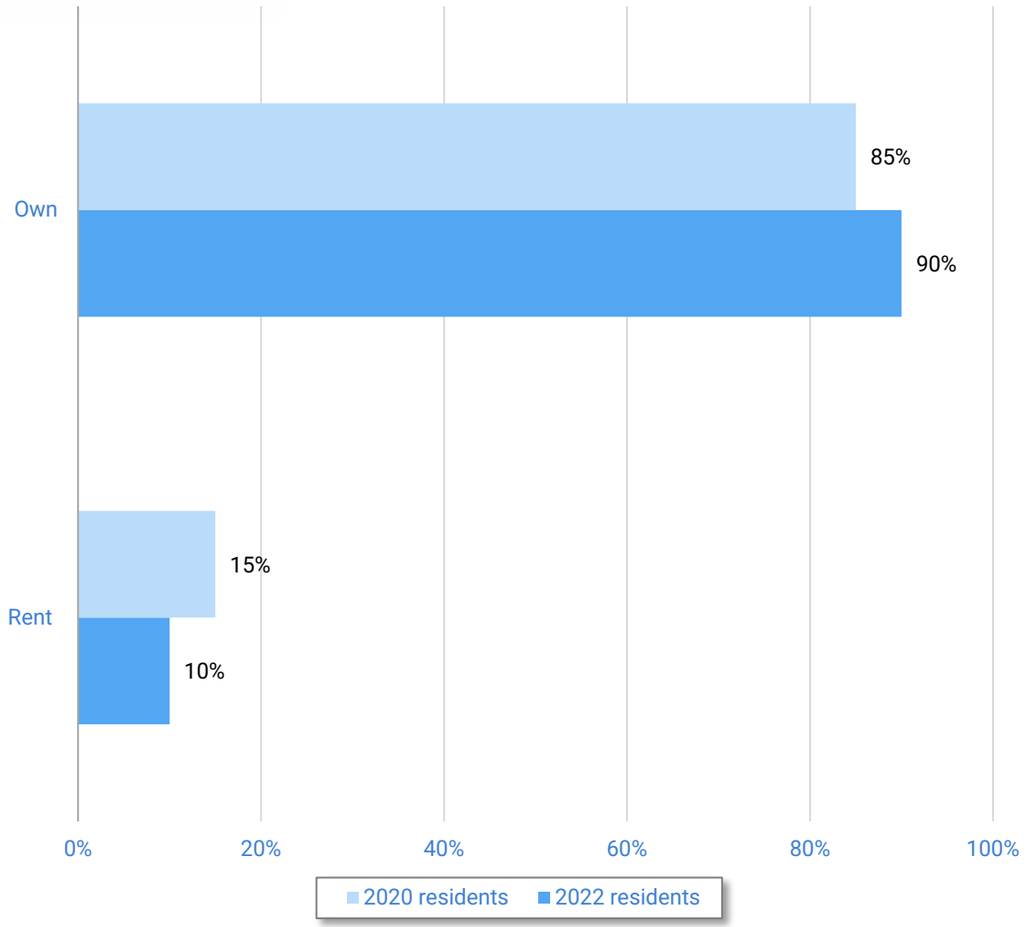
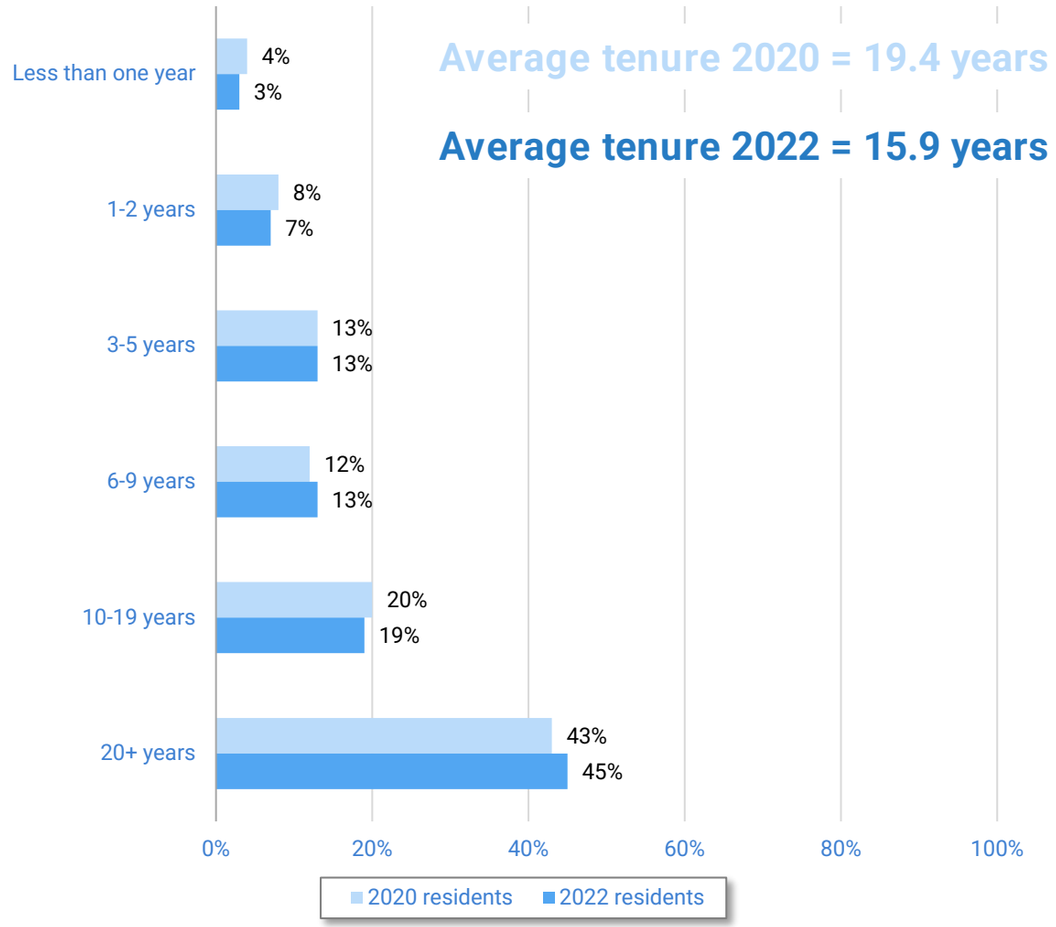
The overwhelming majority of residents own as opposed to renting; average tenure was down 4 years versus 2020

Residence Status (Residents)



Tenure (Residents)



Q7: And do you own or rent your current residence in Buckhead? / Q6: How long have you lived in the Buckhead community?

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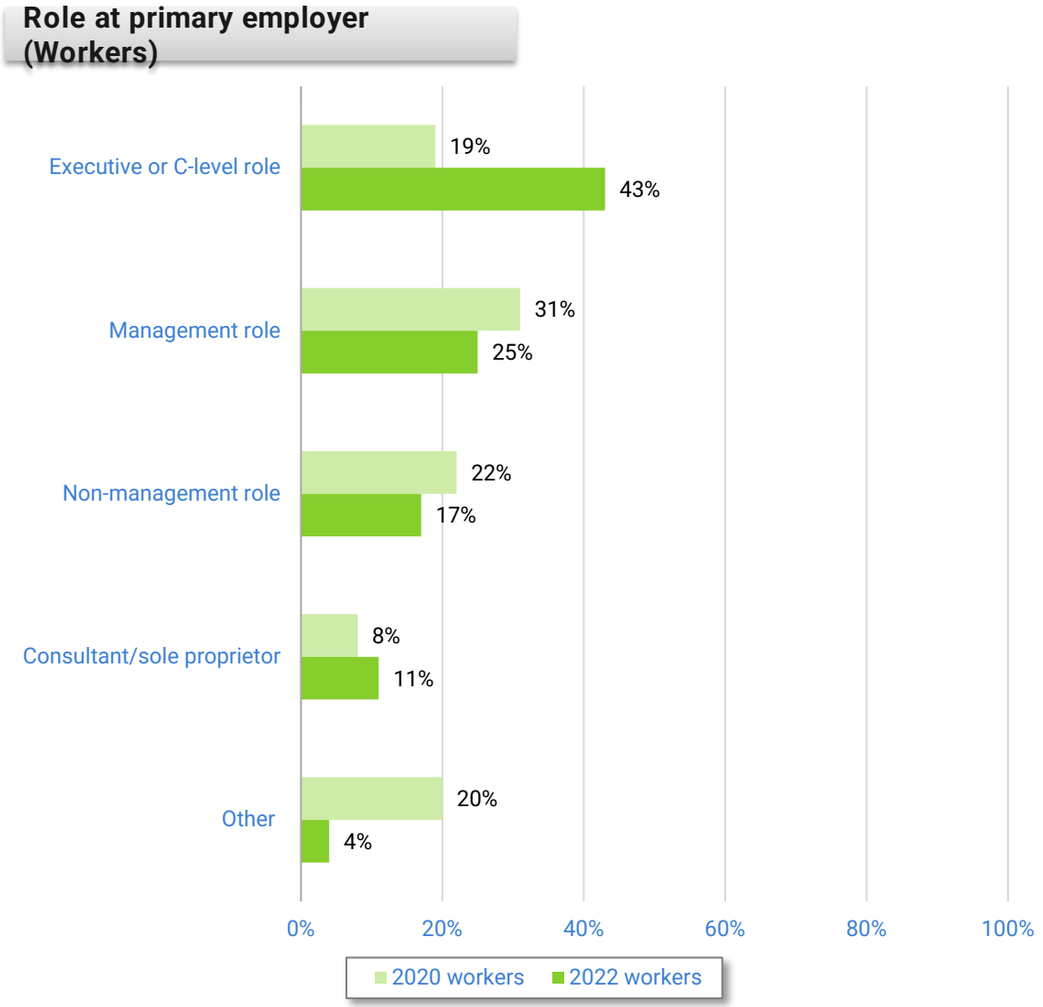
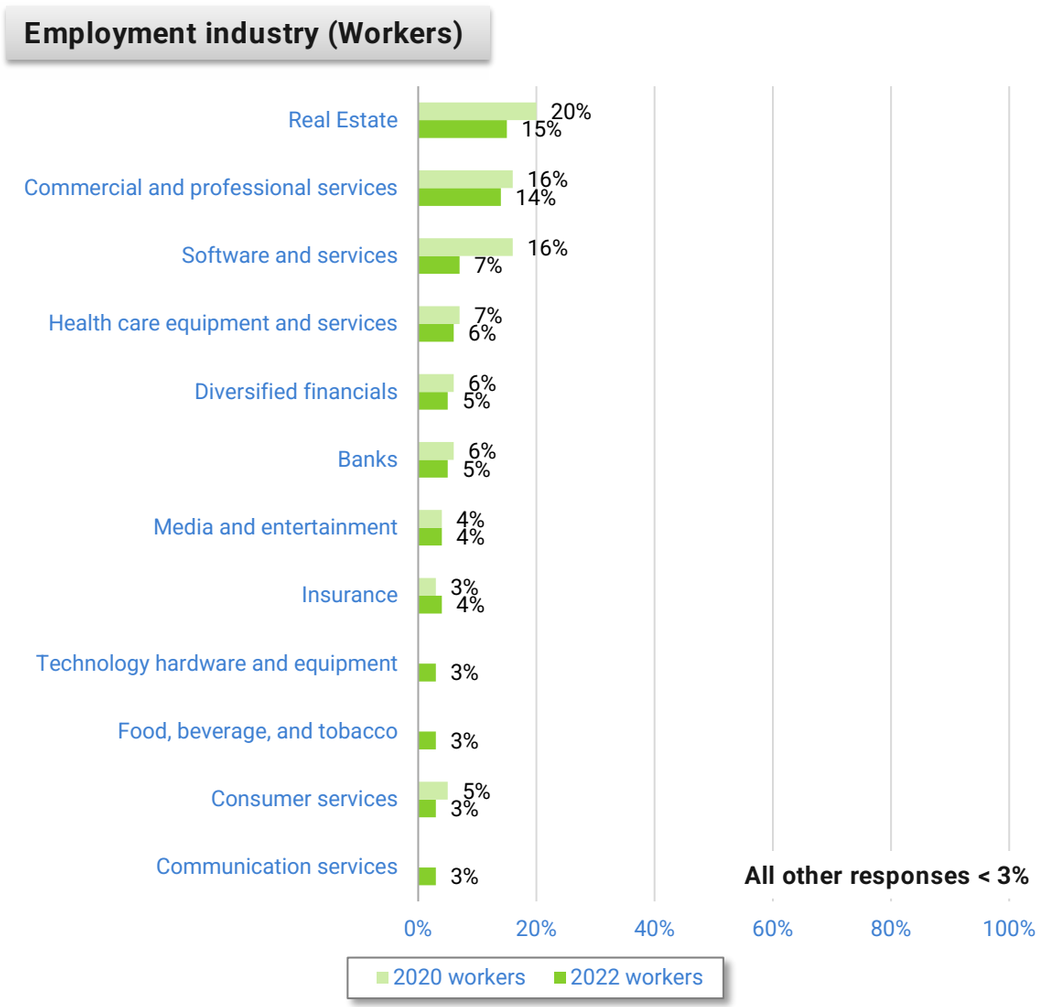
2022 workers included a significantly larger share of executives or C-level roles; the top industries reported were real estate, commercial/professional services, and software





Q5: Which of the following best describes your current position at your primary employer? / Q35: Please select the industry your company operates in from the list below:

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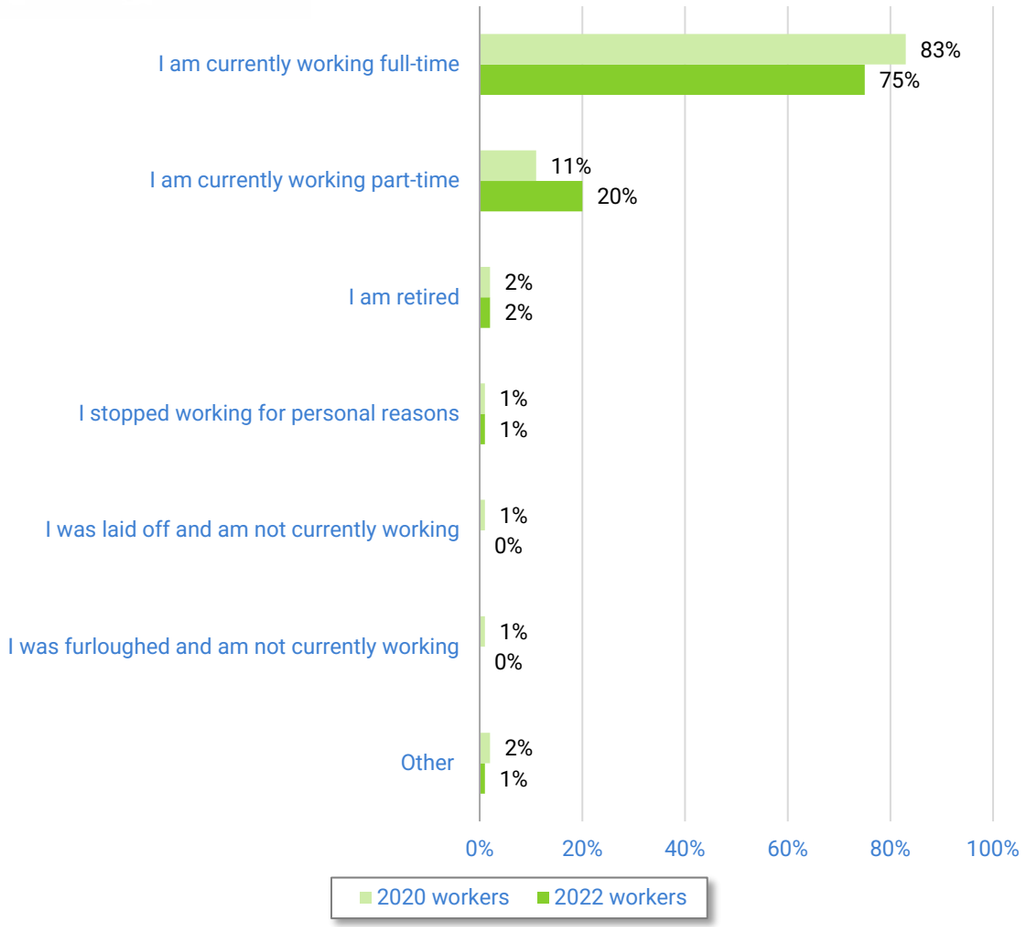
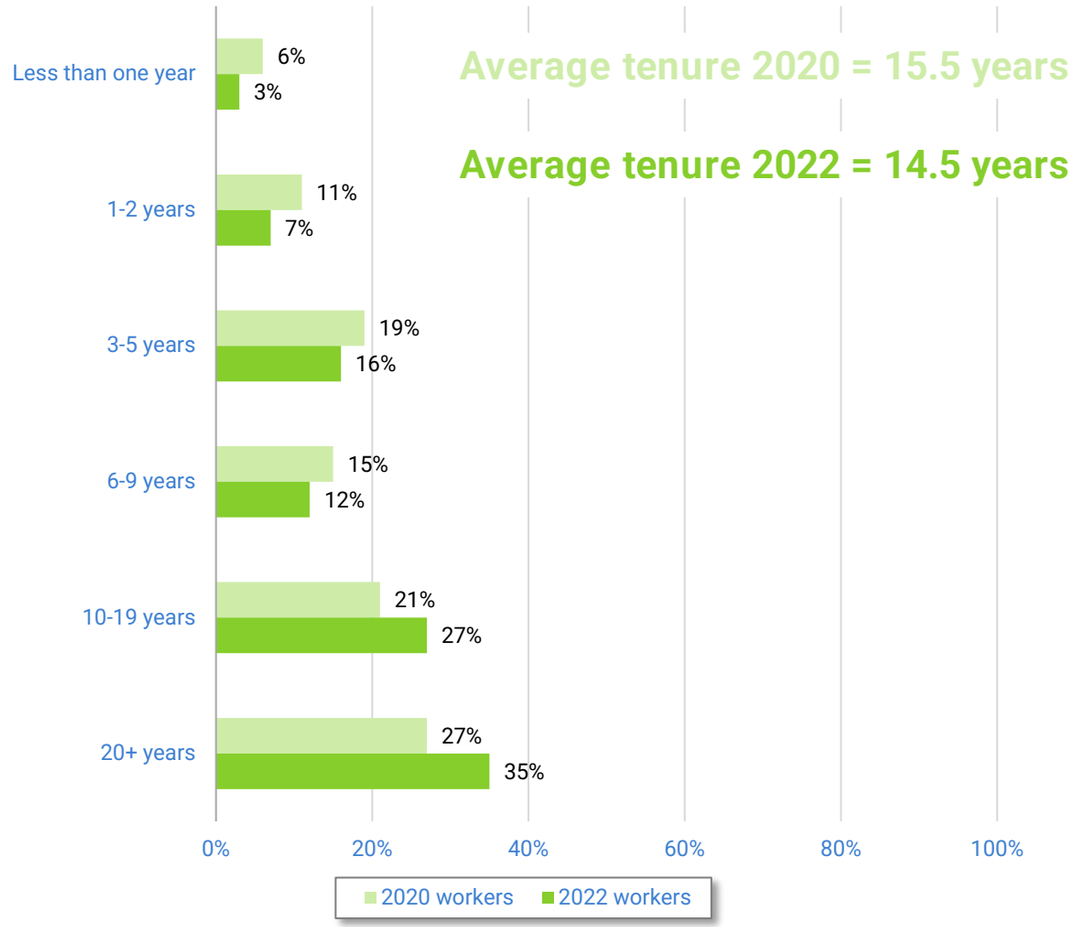
Compared to 2020, more respondents were working part-time instead of full-time

Employment Status (Workers)



Tenure (Workers)



Q4: Which of the following best describes your current work situation? / Q9: How long have you worked in Buckhead?

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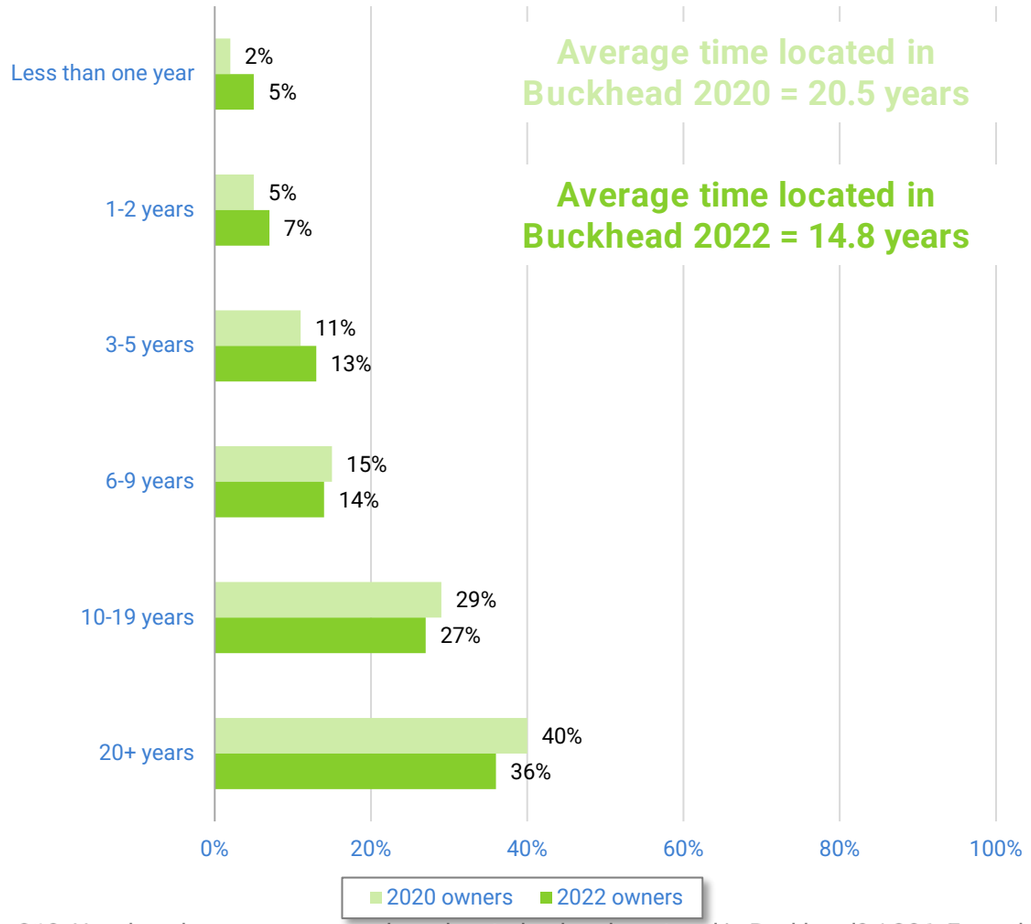
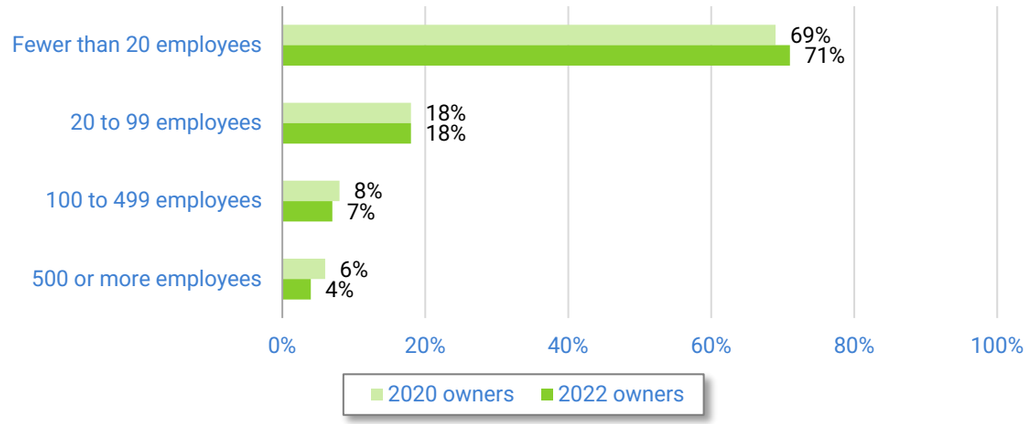
Similar to 2020, business owners were extremely established in terms of their tenure in Buckhead, were likely to have less than 20 employees, and work in either real estate or commercial/professional services

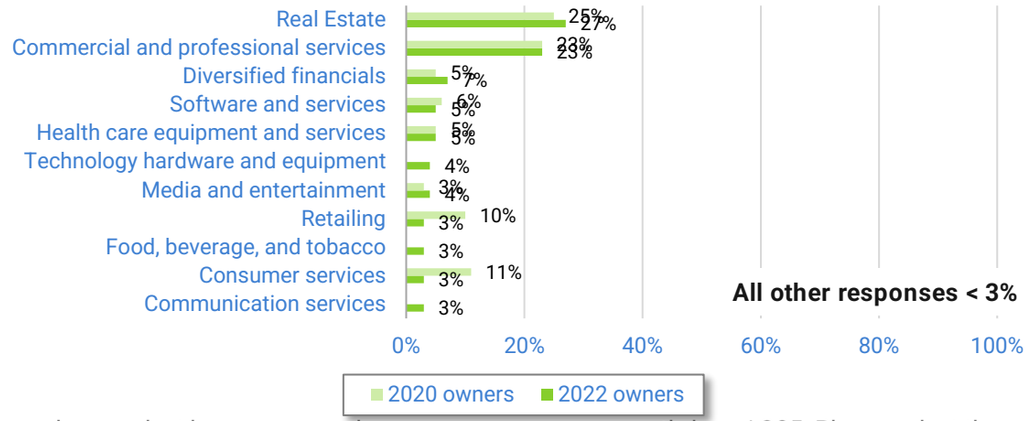
Tenure (Owners)



Company size (Owners)



Employment Industry (Owners)



Q10: How long has your company been located or headquartered in Buckhead? / Q36: From the list below, please select how many employees your company currently has: / Q35: Please select the industry your company operates in from the list below:

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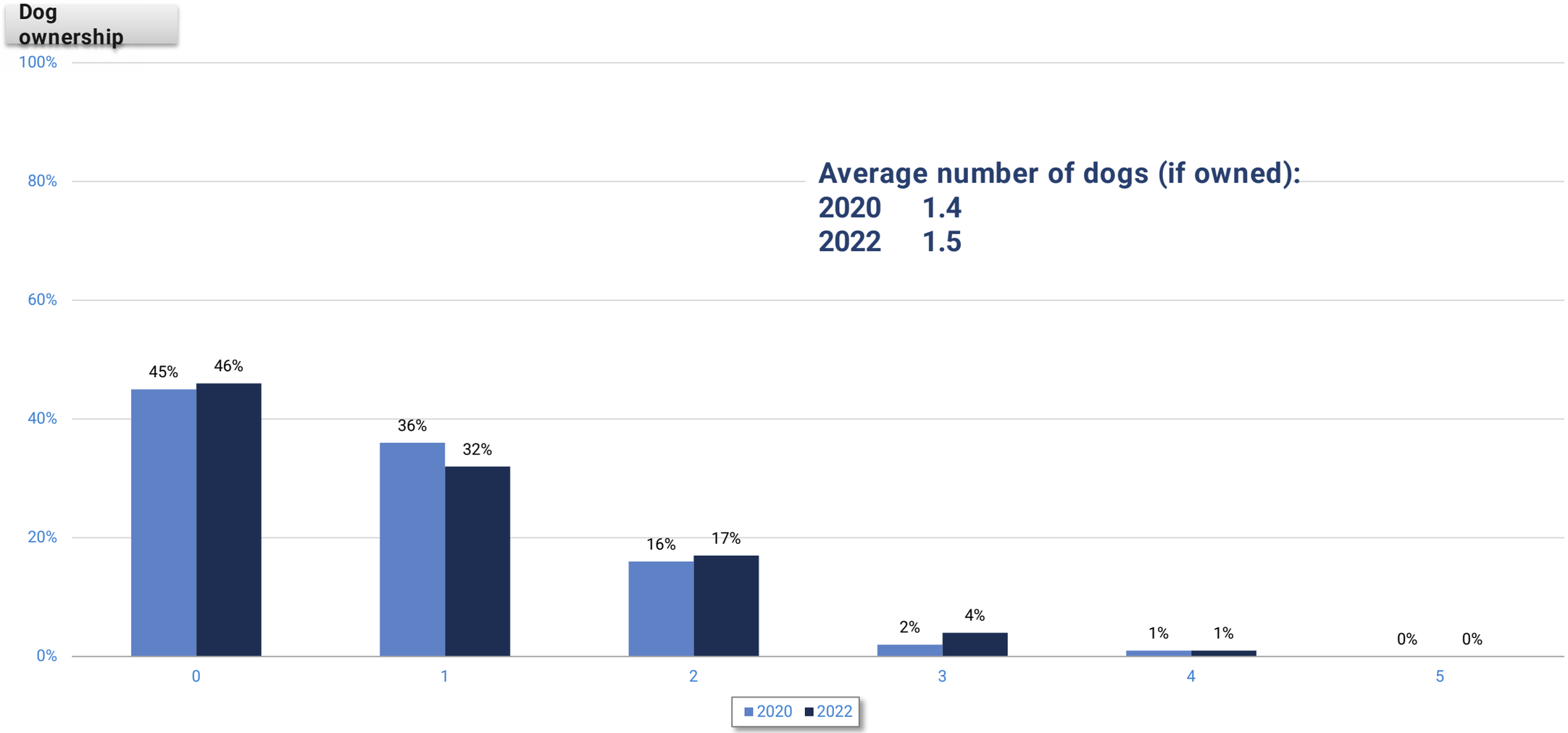
Dog ownership remained consistent from 2020 to 2022, with just over half owning at least one dog



Q49 How many dogs do you currently have in your household?

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Current Perceptions of Buckhead

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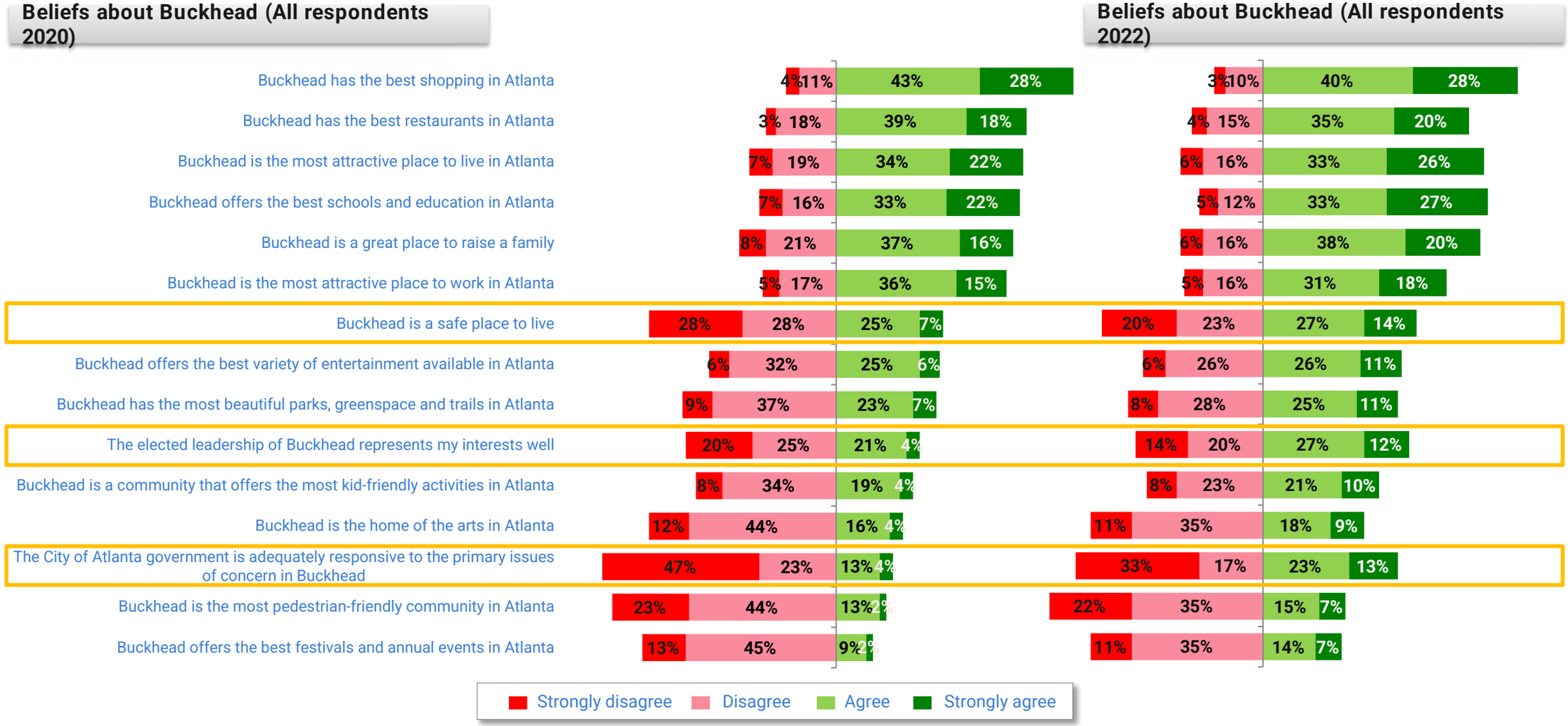
While every statement saw some improvement from 2020, the three with the greatest improvement were: being a safe place to live, Buckhead leadership, and the City being responsive



Q13 Thinking about your perceptions of the Buckhead community, please indicate how strongly you agree or disagree with each of the following aspirational statements:

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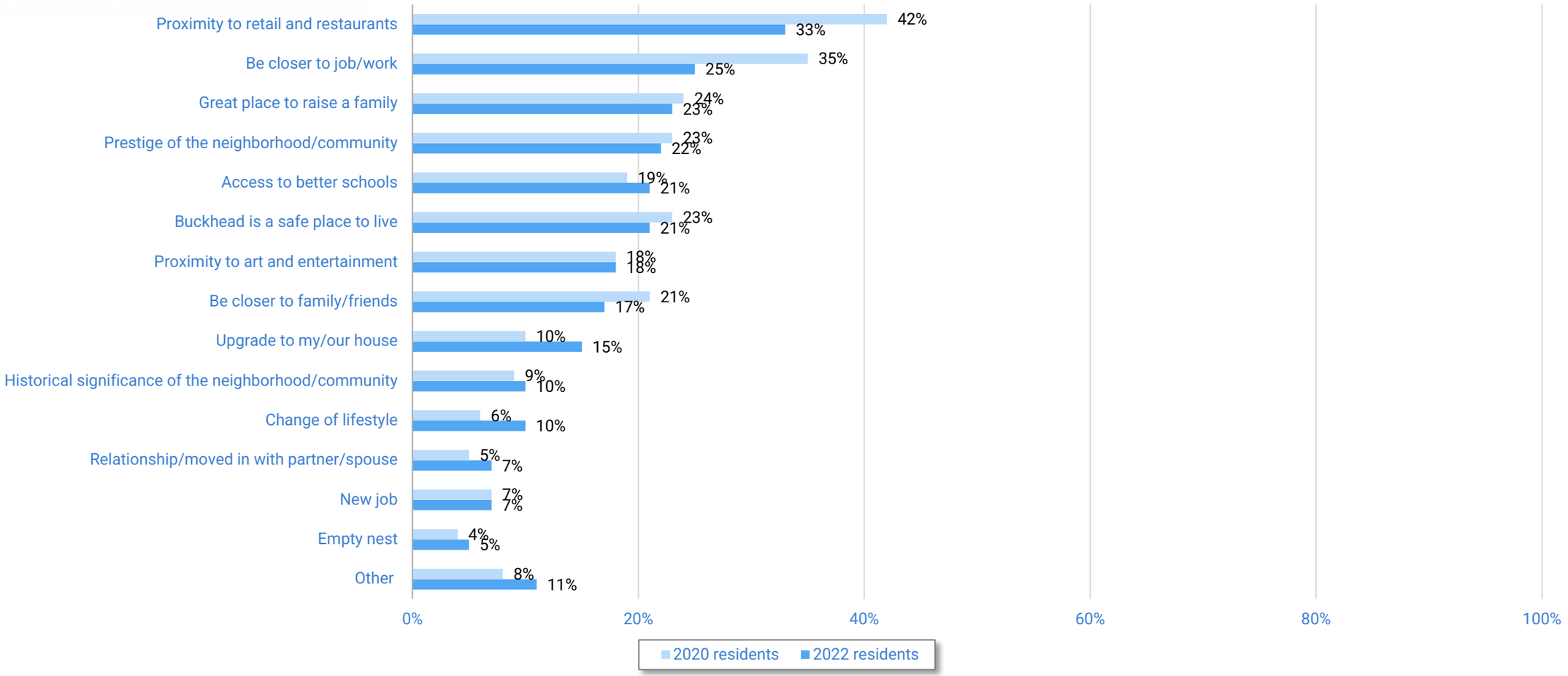
The top reasons for moving to Buckhead remained being closer to retail/restaurants and their job/work, and because they feel it is a great place to raise a family

Reasons for moving to Buckhead (Residents)



Q8: Which of the following were the most important factors in your decision to move to Buckhead? Please select up to three.

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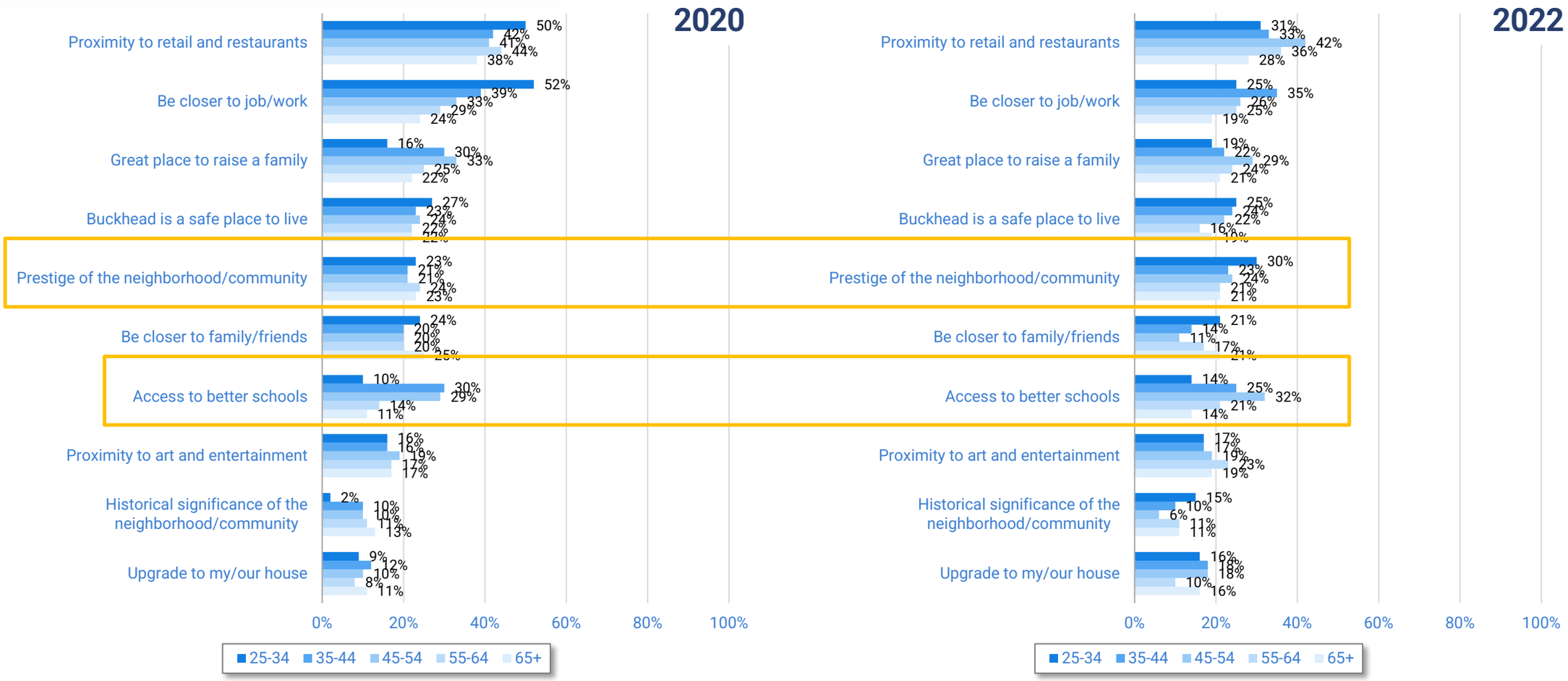
The top reasons for moving to Buckhead continued to show differences by age: younger audiences valued the prestige of Buckhead, while 35-54 year-olds focused on schools

Reasons for moving to Buckhead (Residents by age)



Q8: Which of the following were the most important factors in your decision to move to Buckhead? Please select up to three.

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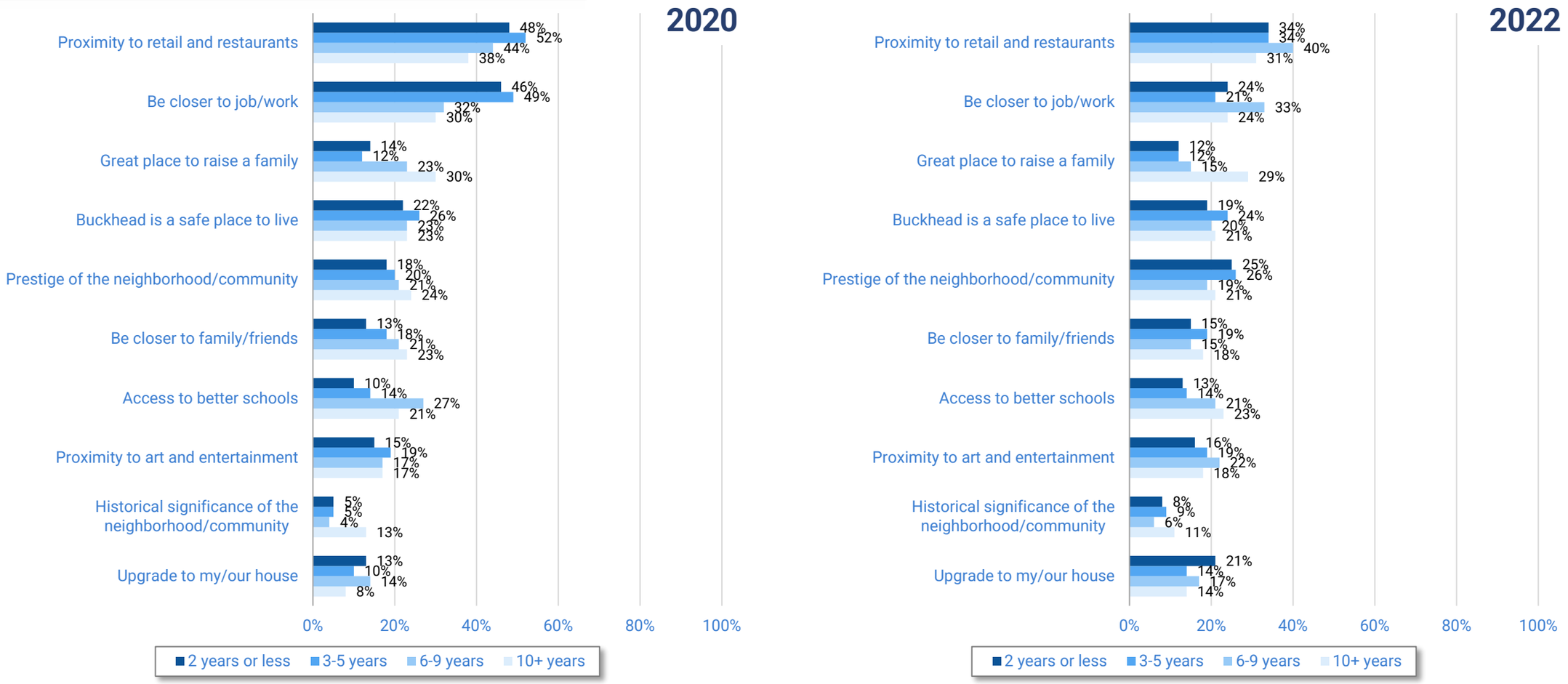
Regardless of residential tenure, the top reason for moving to Buckhead remained proximity to retail and restaurants

Reasons for moving to Buckhead (Residents by tenure)



Q8: Which of the following were the most important factors in your decision to move to Buckhead? Please select up to three.

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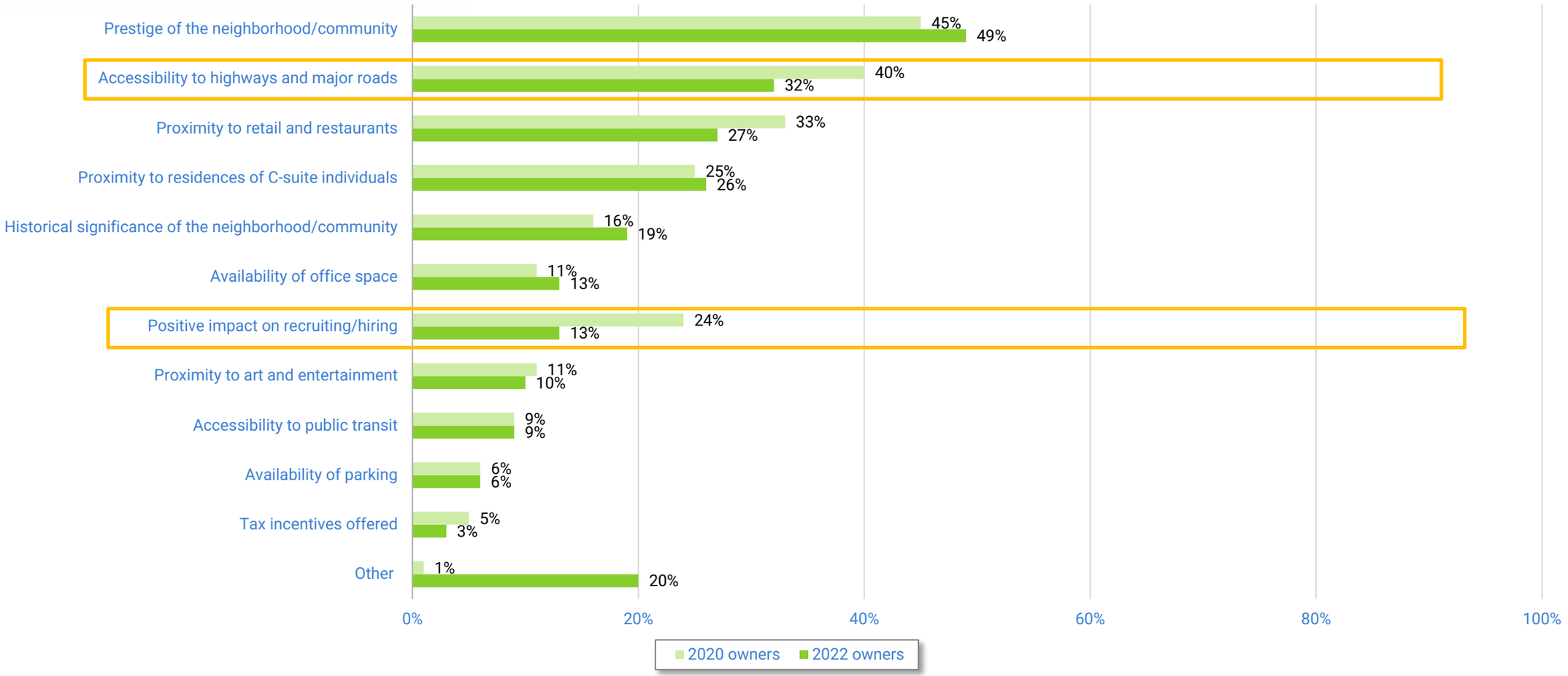
In both 2020 and 2022, the top reason for locating their company in Buckhead was the prestige of the neighborhood/community

Reasons for locating company in Buckhead (Owners)



Q11: Which of the following were the most important factors in your decision to locate your company in Buckhead? Please select up to three.

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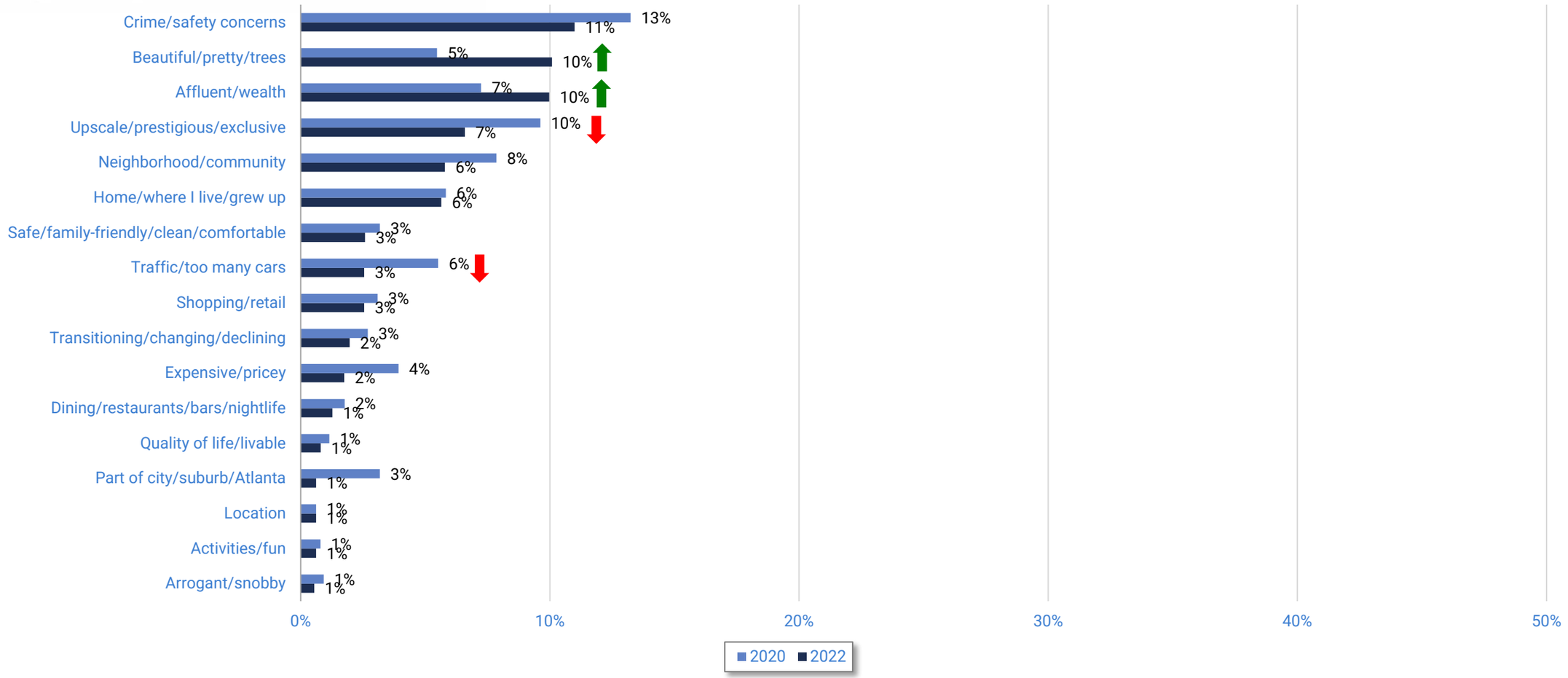
While crime remained at the top of unaided associations with Buckhead, associations declined slightly, while associations with the aesthetics and affluence of Buckhead strengthened

Top of mind associations with Buckhead (All respondents)



Q12 What is the first word or phrase that comes to mind when you think of Buckhead?

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Top of mind associations with crime/safety have dropped among 35-54 year-olds; associations with visual beauty/trees have improved across the board

First word or phrase that comes to mind (All respondents by age)

	25-34		35-44		45-54		55-64		65+	
	2020	2022	2020	2022	2020	2022	2020	2022	2020	2022
Crime/safety concerns	8%	11%	17%	10% ↓	22%	12% ↓	19%	17%	11%	12%
Upscale/prestigious/exclusive	25%	5% ↓	17%	5% ↓	12%	7% ↓	14%	7% ↓	11%	9%
Affluent/wealth	11%	8%	10%	12%	10%	12%	6%	9%	6%	5%
Transitioning/changing/declining	2%	2%	4%	1%	6%	3%	6%	4%	6%	3%
Beautiful/pretty/trees	1%	5%	4%	11% ↑	4%	11% ↑	6%	10% ↑	8%	11%
Traffic/too many cars	4%	2%	5%	3%	4%	2%	3%	4%	5%	3%
Home/where I live/grew up	2%	1%	3%	2%	3%	5%	5%	8%	8%	12%
Expensive/pricey	5%	3%	4%	1%	2%	1%	2%	1%	3%	1%
Location	3%	1%	2%	0%	3%	1%	4%	1%	5%	1%
Neighborhood/community	3%	2%	2%	4%	4%	4%	3%	8%	5%	9%
Safe/family-friendly/clean/comfortable	4%	5%	2%	3%	3%	3%	3%	1%	3%	5%
Shopping/retail	4%	2%	3%	2%	3%	3%	3%	5%	2%	3%
Arrogant/snobby	4%	1%	5%	0%	1%	1%	1%	1%	2%	0%
Part of city/suburb/Atlanta	3%	2%	2%	3%	3%	4%	2%	4%	1%	3%
Quality of life/livable	1%	1%	0%	0%	1%	0%	2%	2%	5%	2%
Activities/fun	2%	1%	2%	1%	1%	1%	1%	0%	2%	1%
Dining/restaurants/bars/nightlife	2%	2%	2%	1%	2%	1%	2%	2%	1%	2%

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Top of mind associations with “affluent/wealth” increased among newer Buckhead residents, while associations with being “upscale” and “prestigious” declined across the board

First word or phrase that comes to mind (All residents by tenure)

	Less than 3 years		3-5 years		6-9 years		10+ years	
	2020	2022	2020	2022	2020	2022	2020	2022
Crime/safety concerns	6%	6%	15%	13%	20%	17%	21%	11%
Upscale/prestigious/exclusive	21%	13% ↓	22%	8% ↓	17%	8% ↓	11%	7% ↓
Affluent/wealth	10%	18% ↑	10%	9%	11%	8%	6%	7%
Transitioning/changing/declining	2%	4%	2%	1%	3%	4%	7%	4%
Beautiful/pretty/trees	3%	3%	3%	4%	4%	8%	7%	11%
Traffic/too many cars	4%	1%	3%	0%	2%	1%	2%	2%
Home/where I live/grew up	2%	3%	2%	4%	2%	1%	7%	9%
Expensive/pricey	6%	1%	4%	1%	2%	2%	2%	1%
Location	1%	2%	6%	2%	8%	1%	3%	1%
Neighborhood/community	2%	6%	3%	5%	2%	5%	5%	10%
Safe/family-friendly/clean/comfortable	3%	4%	5%	5%	4%	6%	3%	4%
Shopping/retail	4%	1%	2%	4%	1%	4%	2%	1%
Arrogant/snobby	9%	0%	2%	0%	2%	1%	2%	1%
Part of city/suburb/Atlanta	4%	7%	3%	2%	2%	4%	2%	5%
Quality of life/livable	0%	1%	1%	1%	2%	1%	3%	1%
Activities/fun	2%	1%	2%	1%	1%	1%	1%	1%
Dining/restaurants/bars/nightlife	2%	2%	1%	3%	1%	2%	1%	1%

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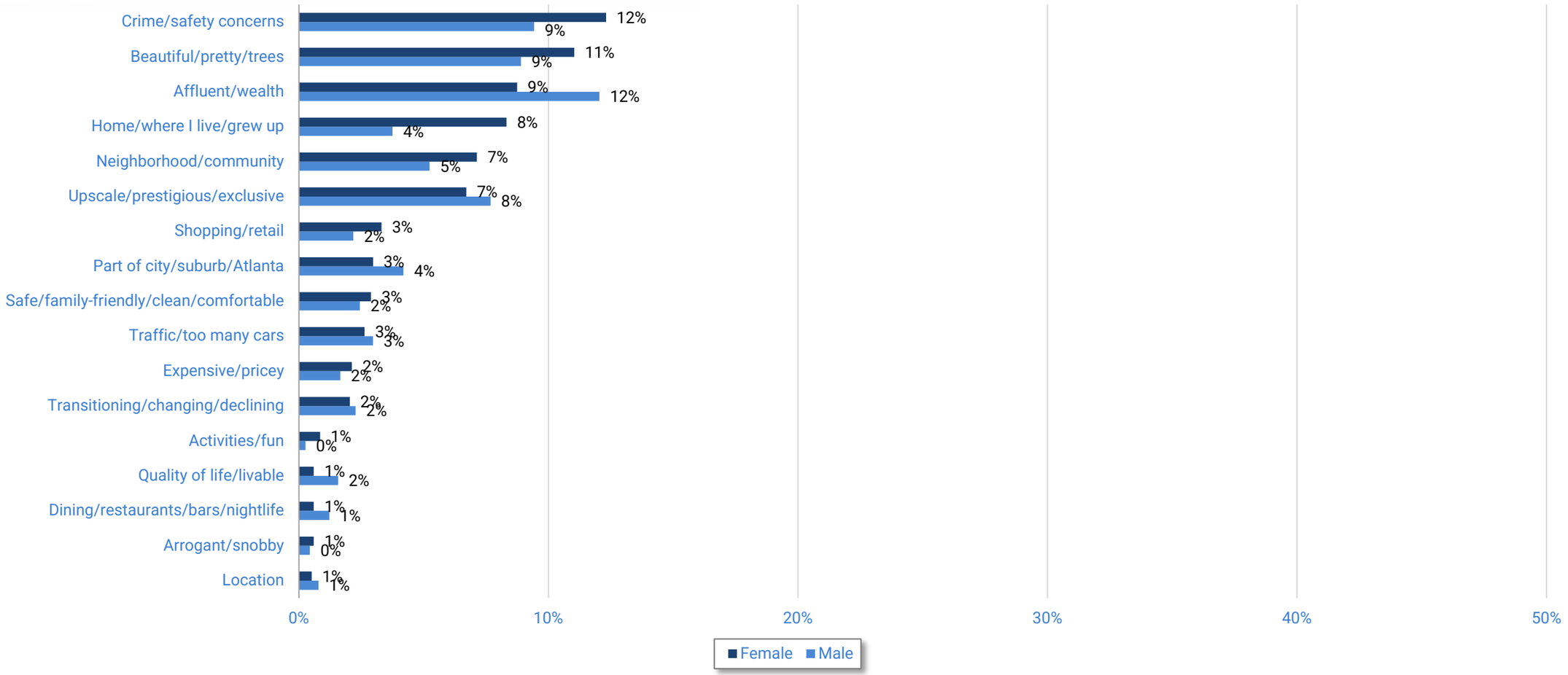
While crime and beauty were the top associations among females, men were most likely to associate affluence and wealth with Buckhead

First word or phrase that comes to mind (All 2022 respondents by gender)



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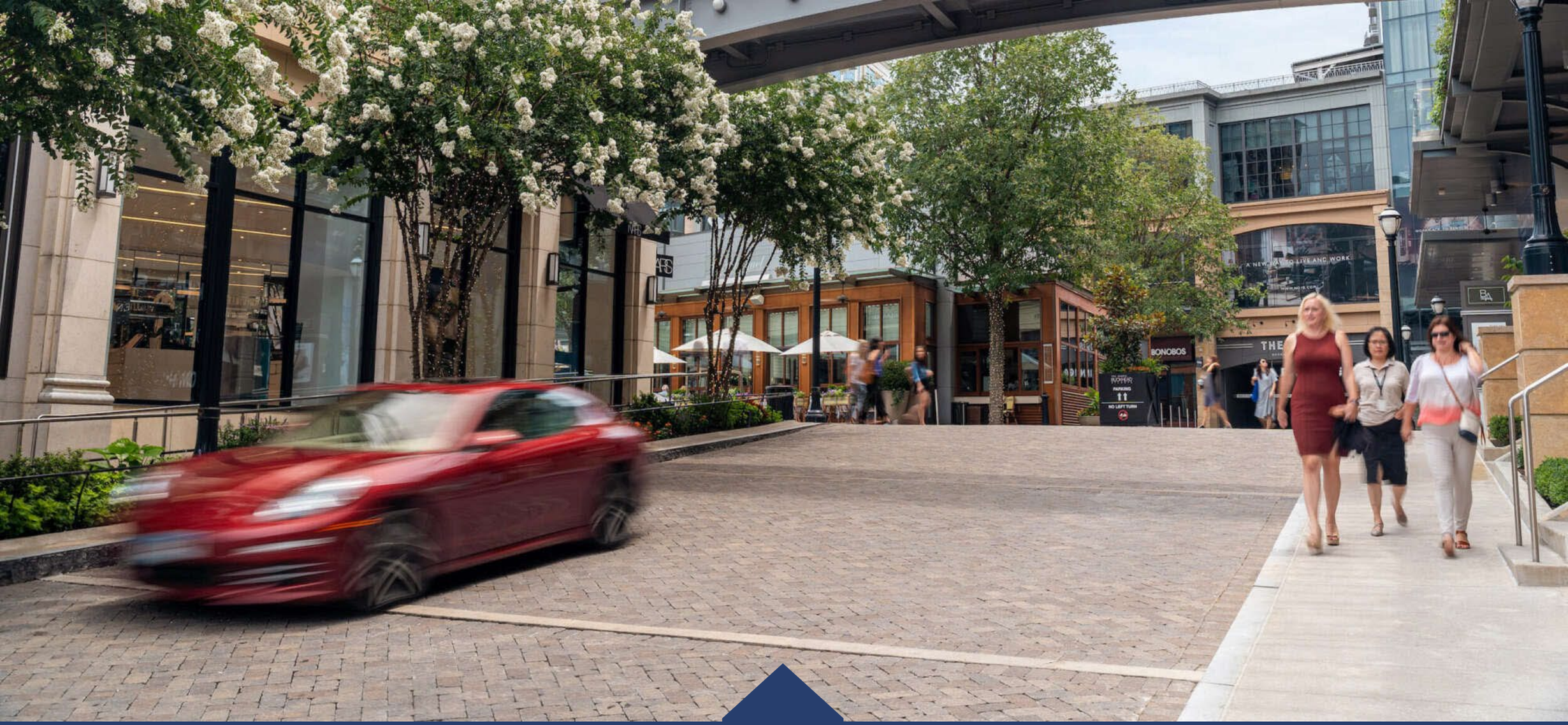

Issues and Challenges Facing Buckhead

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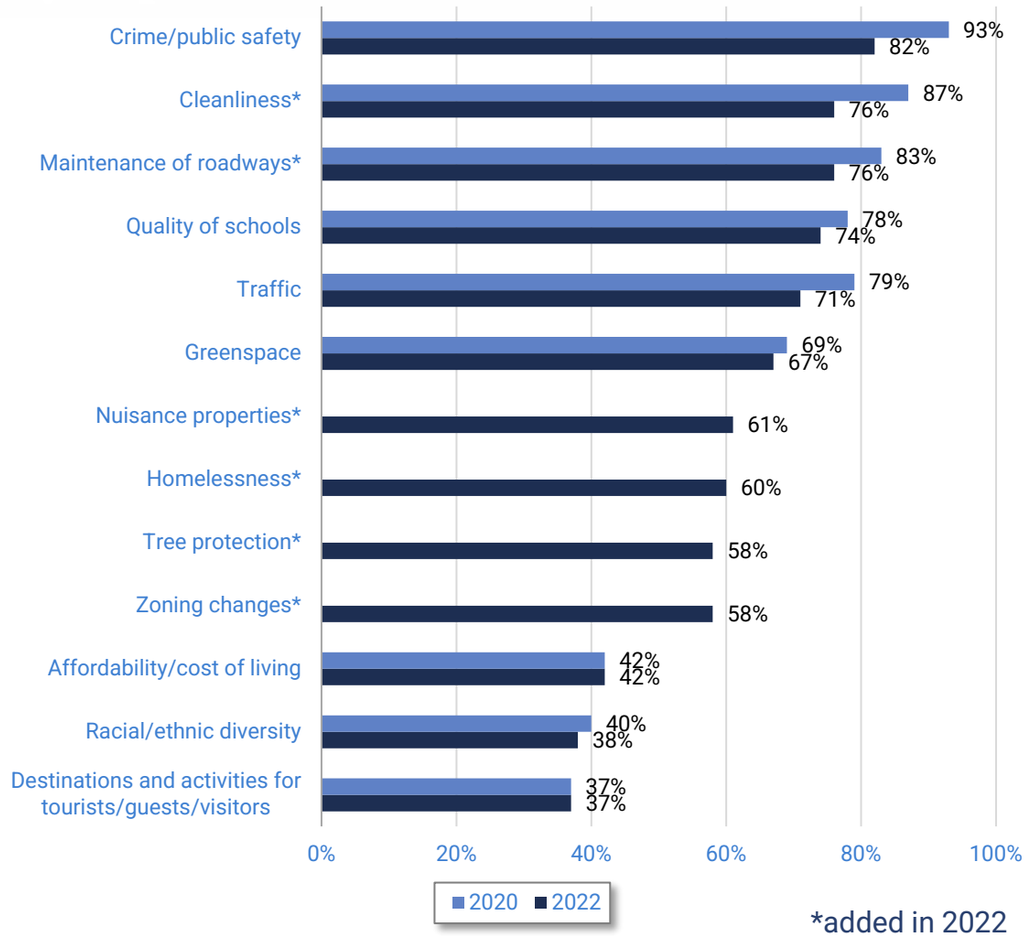
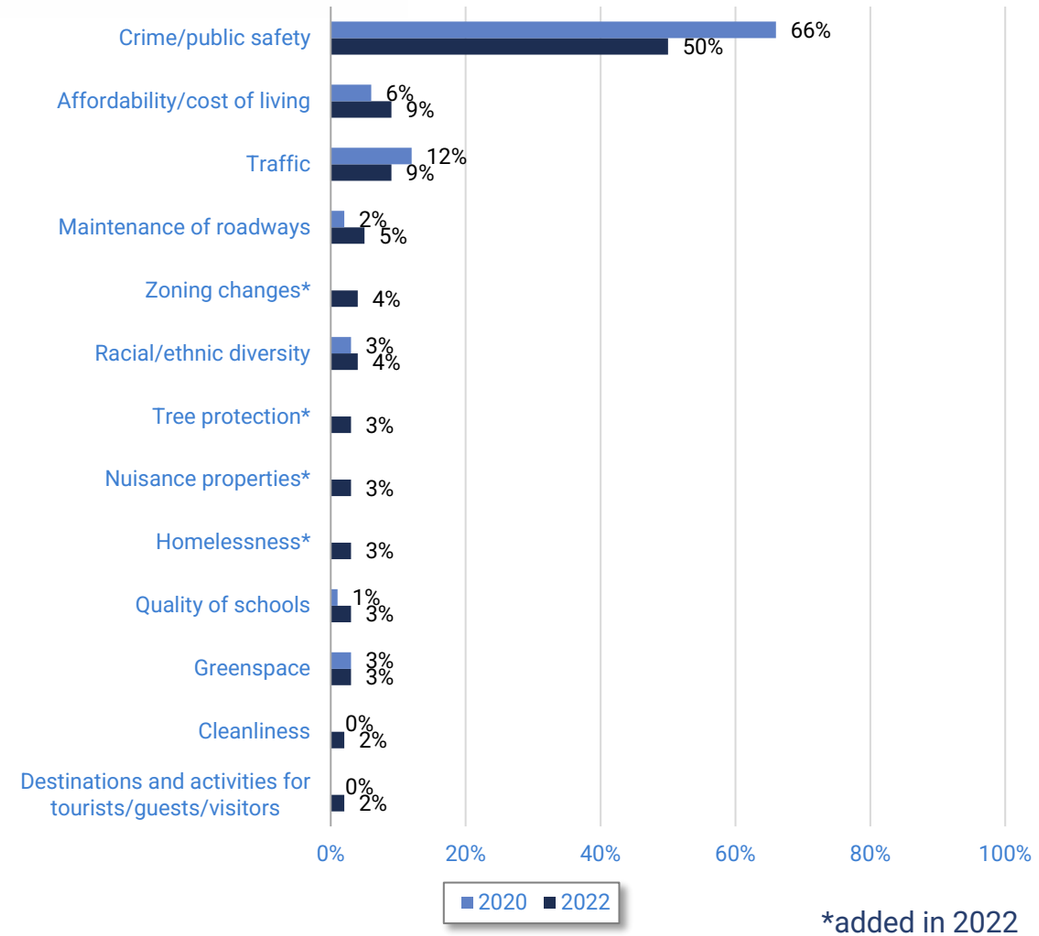
While it decreased in terms of its perceived importance, crime and public safety remained the most important issue for Buckhead

Importance of issues for Buckhead (Very + Extremely Important)



*added in 2022

MOST important issue for Buckhead



*added in 2022

Q15 In your opinion, how important are each of the following issues for Buckhead? / Q16 And which of these do you feel is the single most pressing issue facing Buckhead?

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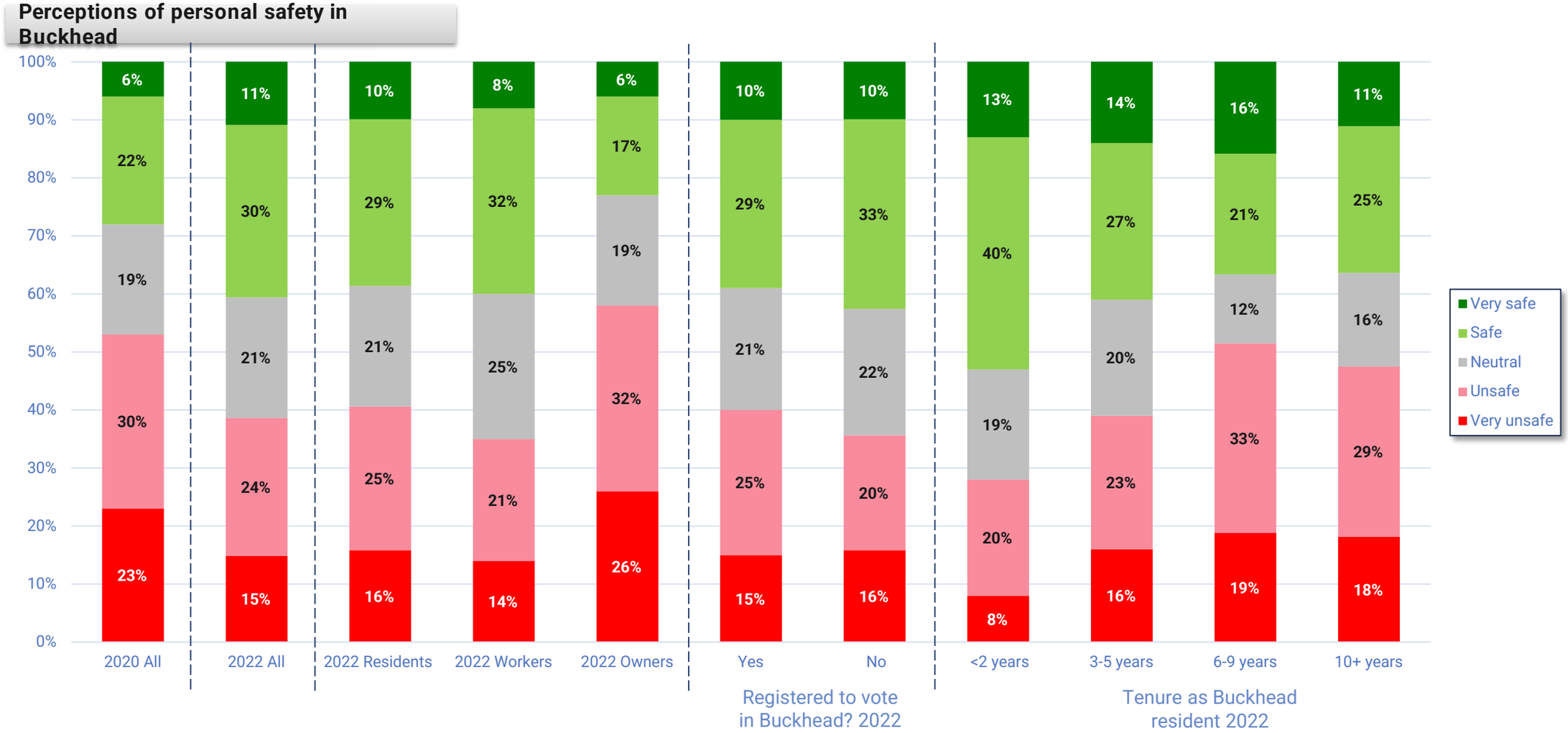
Overall, perceptions of safety improved versus 2020, as those feeling safe increased by 13 points to 41% and those feeling unsafe decreased by 14 points to 39%



Q14 Now, thinking about safety for a minute, please indicate how safe you feel personally in Buckhead:

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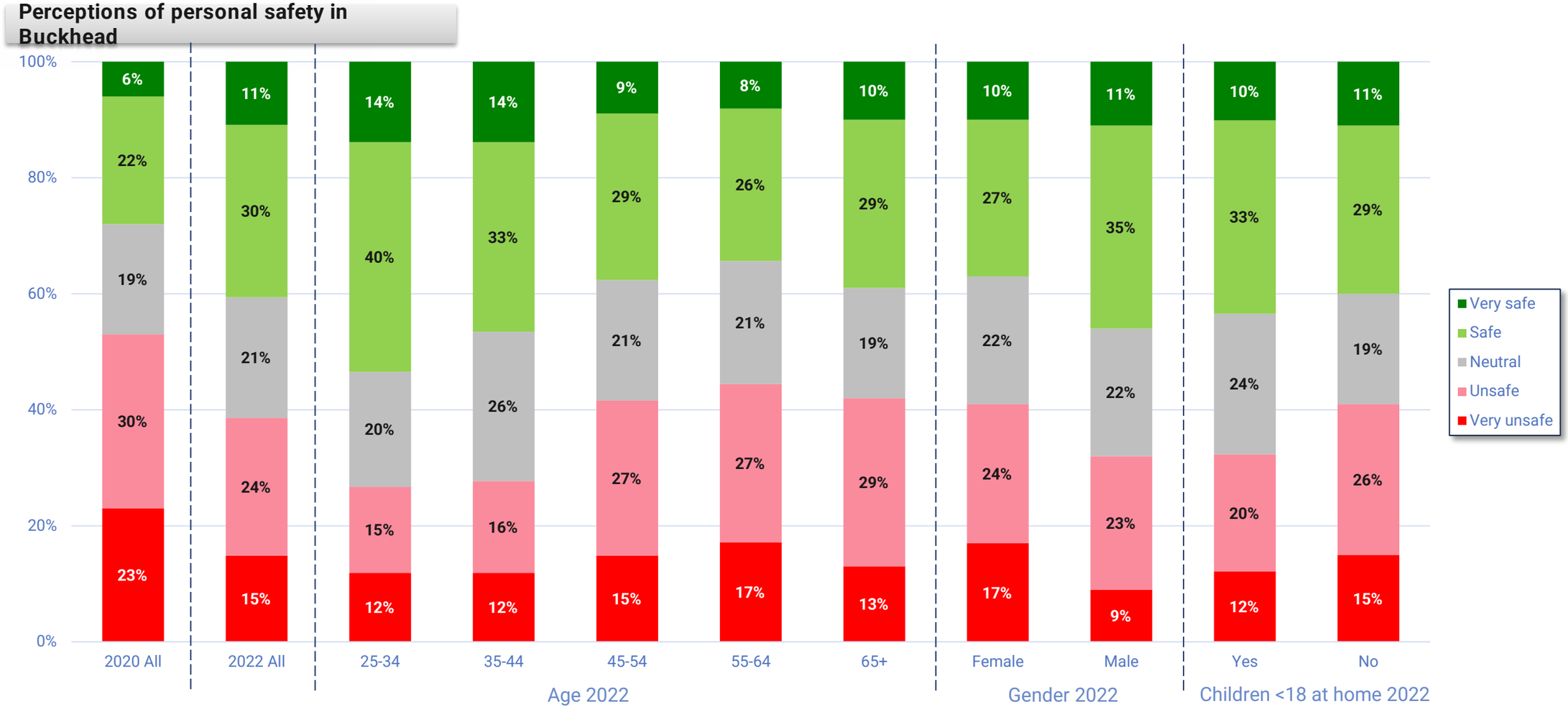
Perceptions of safety were highest among 25-34 year-olds and males, while feelings of being unsafe were highest among females and older (45+) individuals



Q14 Now, thinking about safety for a minute, please indicate how safe you feel personally in Buckhead:

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Commute Behavior

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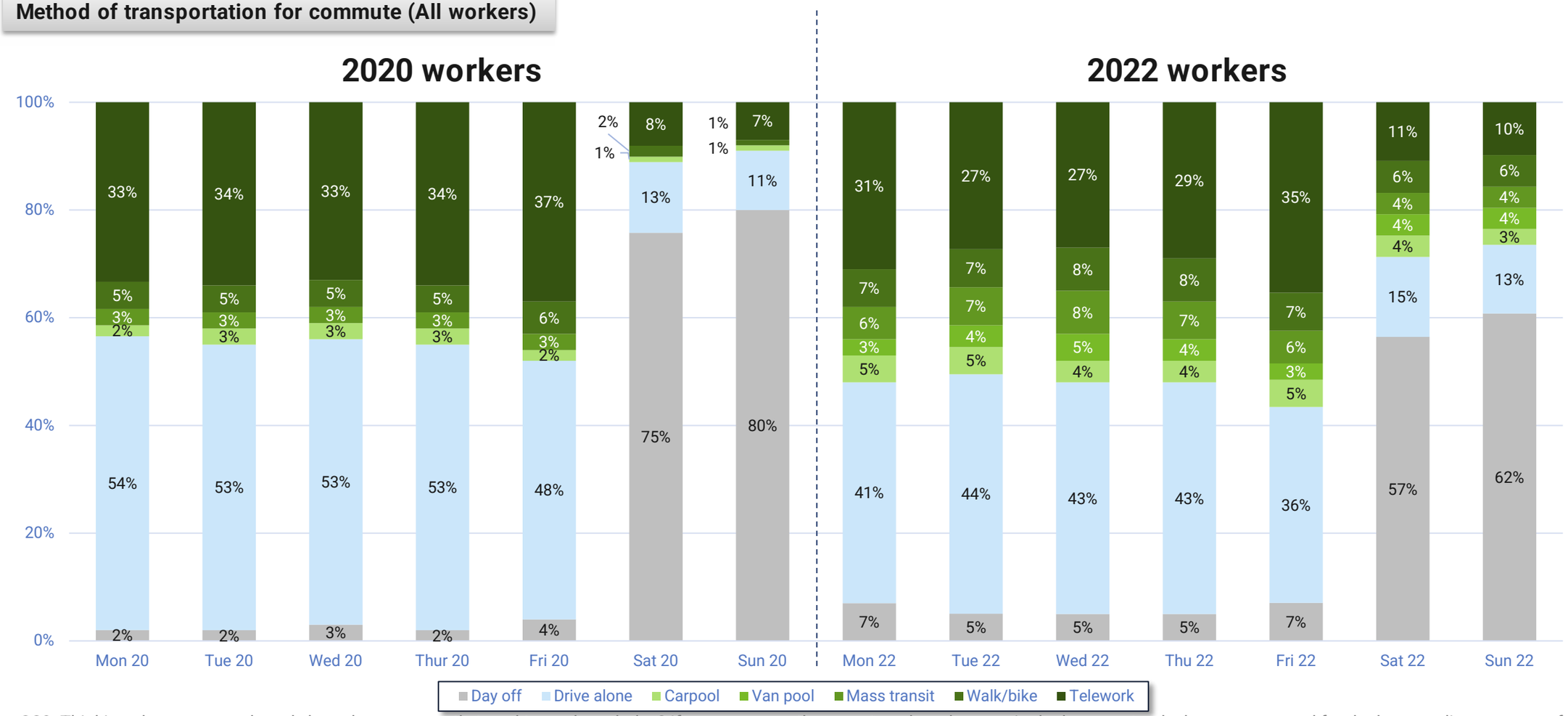
In 2022, driving alone and use of telework were down for each weekday, while use of carpool and mass transit options increased during the week

Method of transportation for commute (All workers)



Q29: Thinking about your workweek, how do you currently travel to work each day? If you use more than one travel mode on a single day, count only the type you used for the longest distance part of your trip. If you are not assigned to work on weekends, count these as "regular days off."

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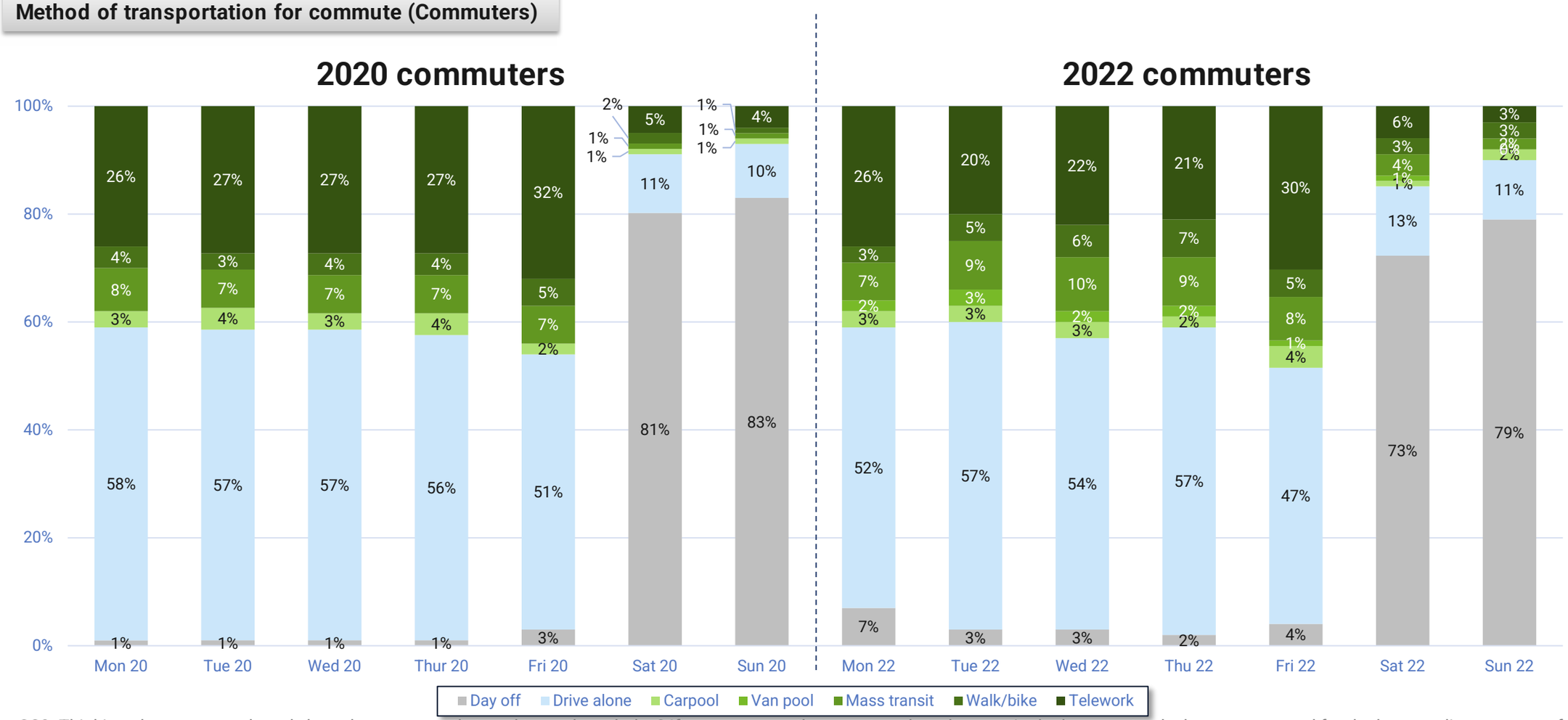
Similarly, among commuters, use of car and vanpool options, mass transit, and even walking/biking to work was up on each weekday

Method of transportation for commute (Commuters)



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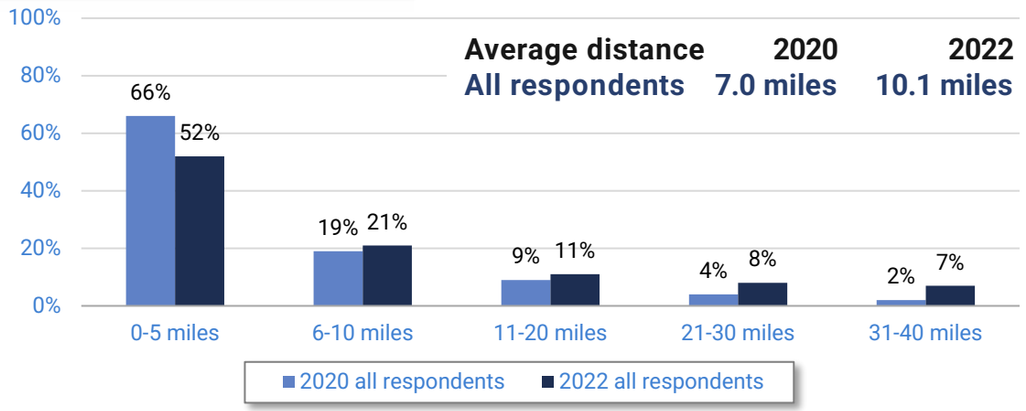
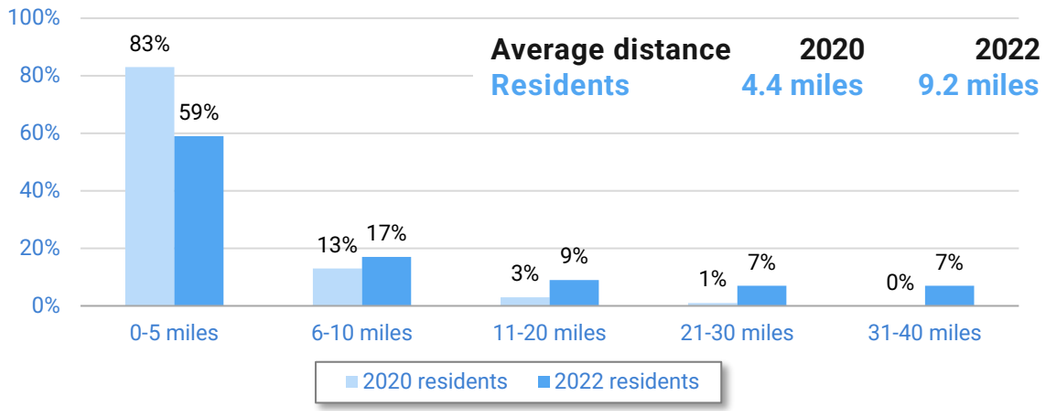
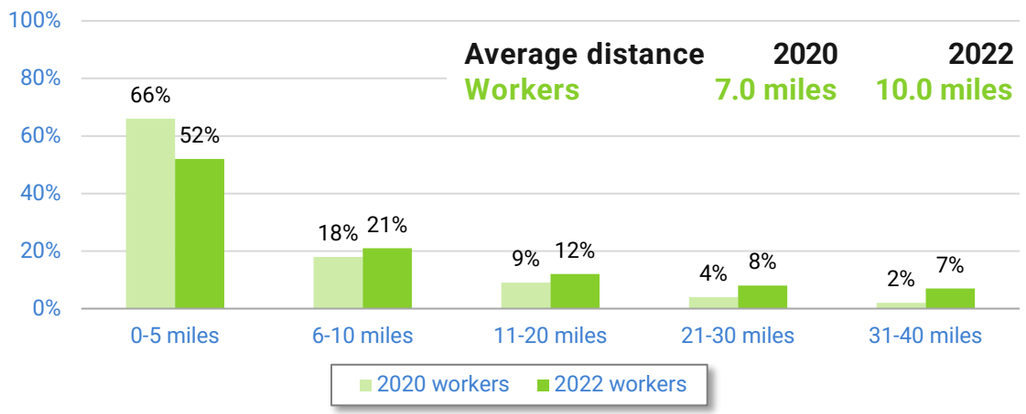
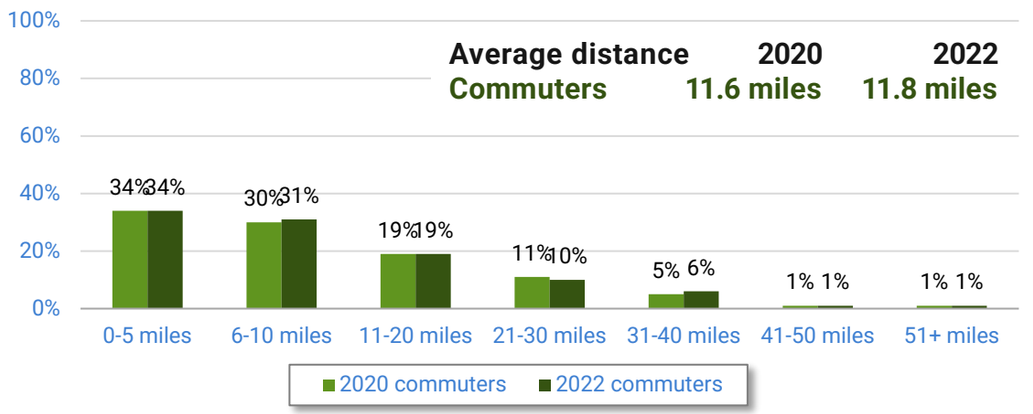
While the majority continue to commute less than five miles to work, 2022 saw all audiences increase/resume longer commute distances – especially of more than 20 miles

Distance to work (One-way)









Q29: How many miles one-way is it from home to your physical work location? / Q30: How many minutes does it usually take you to get from your home to your physical work location? / Q31: How many minutes does it usually take you to make your reverse trip, from your physical work location to your home?

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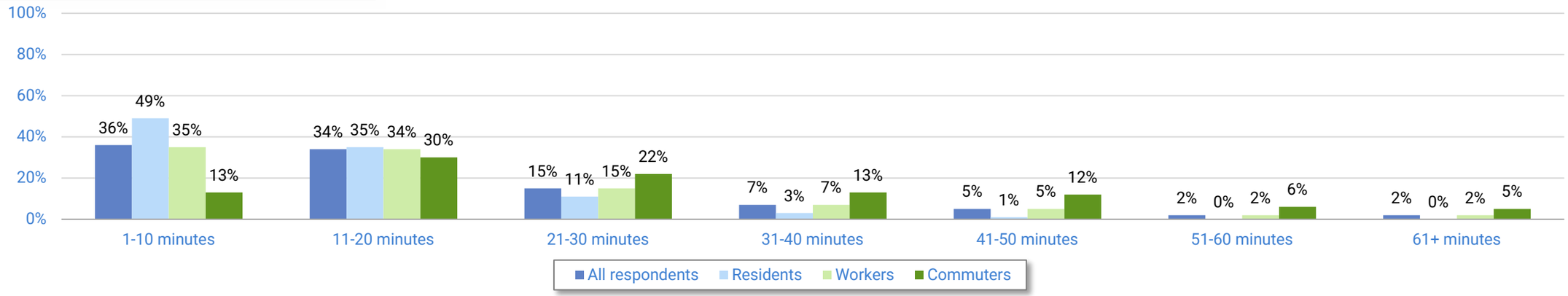
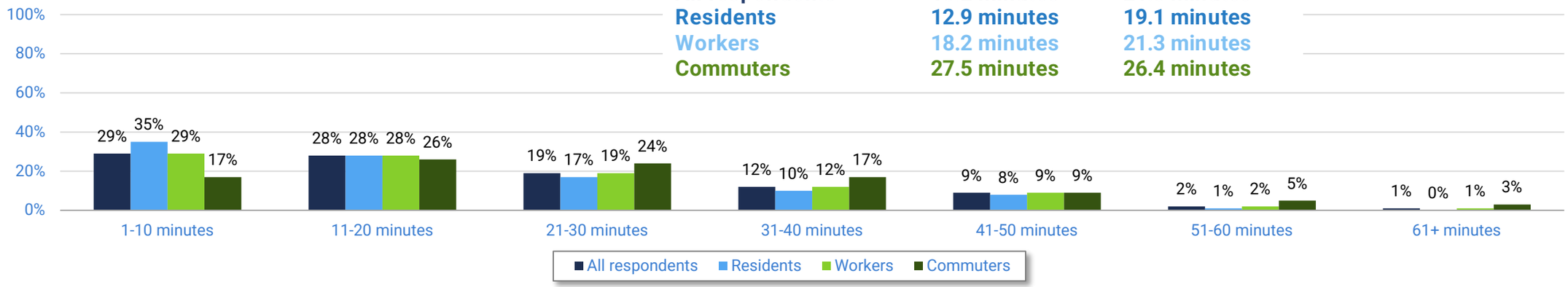
With commute distances increasing as more people returned to the office in 2022, commute times from home to work increased slightly compared to 2020

Commute time (Home to work 2020)



Commute time (Home to work 2022)



Average time	2020	2022
All respondents	18.2 minutes	21.3 minutes
Residents	12.9 minutes	19.1 minutes
Workers	18.2 minutes	21.3 minutes
Commuters	27.5 minutes	26.4 minutes

Q31: How many minutes does it usually take you to get from your home to your physical work location?

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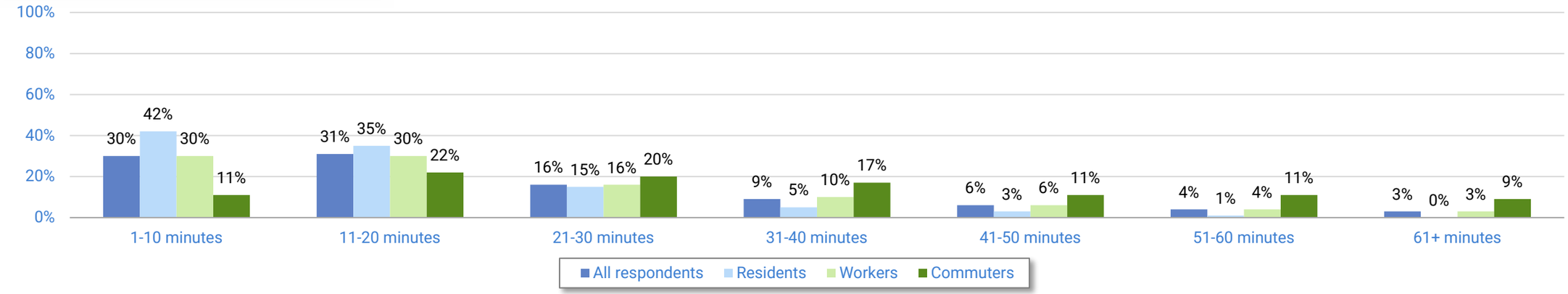
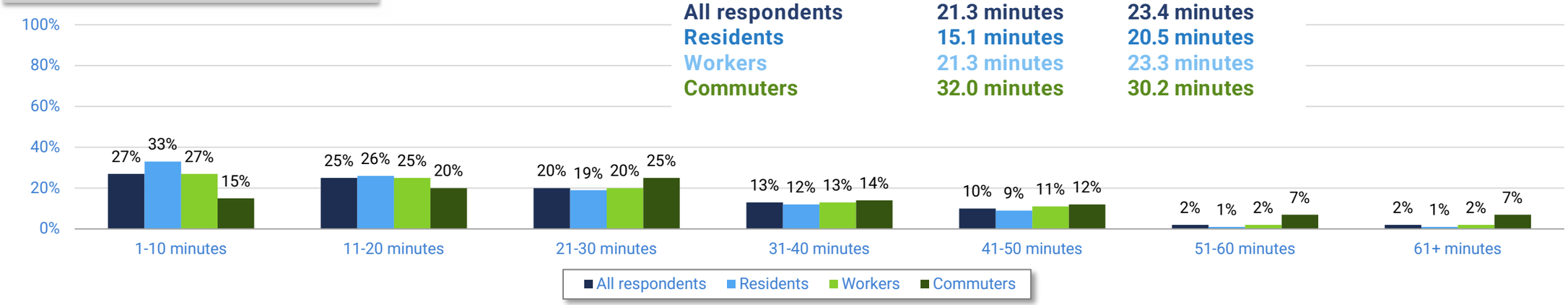
Similarly, commute times from work to home increased, with the overall average increasing from ~21 minutes to ~23 minutes

Commute time (Work to home 2020)



Commute time (Work to home 2022)



Average time	2020	2022
All respondents	21.3 minutes	23.4 minutes
Residents	15.1 minutes	20.5 minutes
Workers	21.3 minutes	23.3 minutes
Commuters	32.0 minutes	30.2 minutes

Q32: How many minutes does it usually take you to make your reverse trip, from your physical work location to your home?

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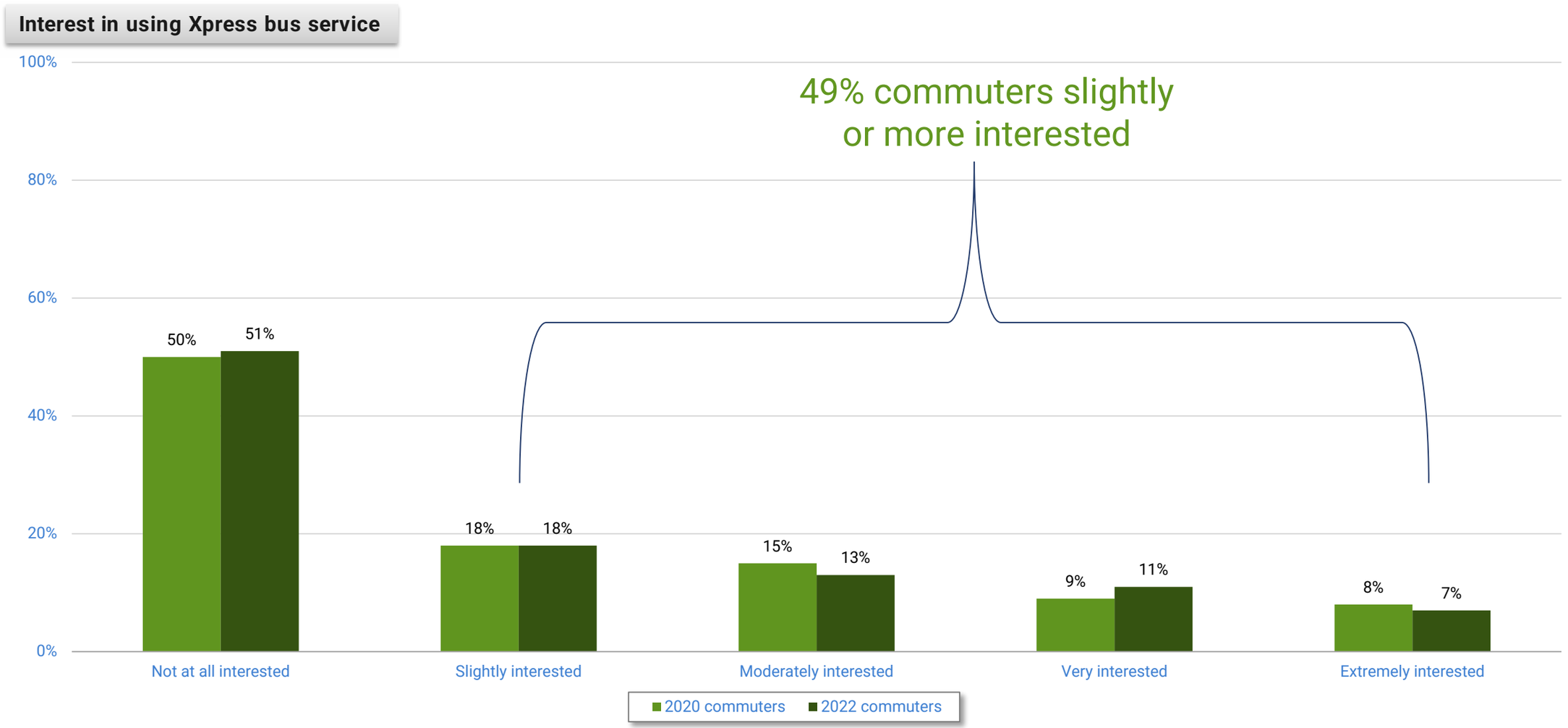
Interest in using Xpress remained consistent versus 2020, with 49% of commuters stating they would be interested in using Xpress



Q33: If Xpress, the regional commuter bus service, were available direct to Buckhead from an origin in your home county, how interested would you be in riding it?

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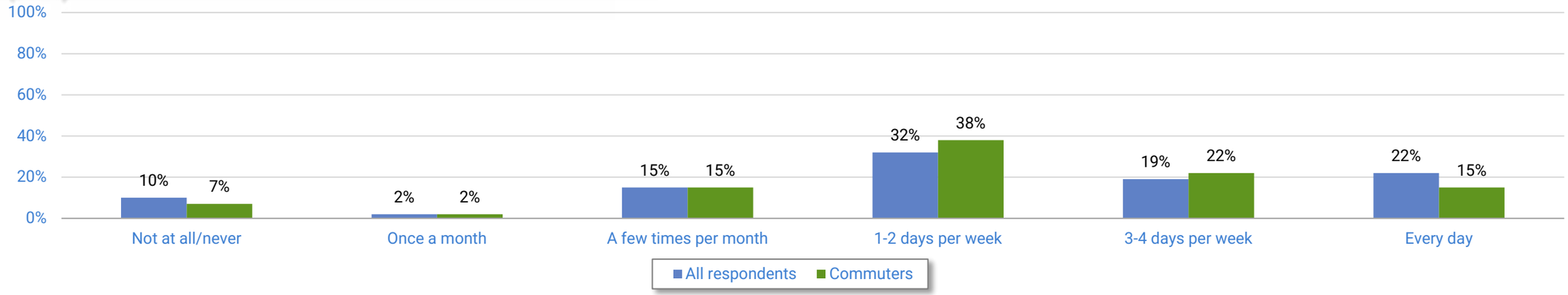
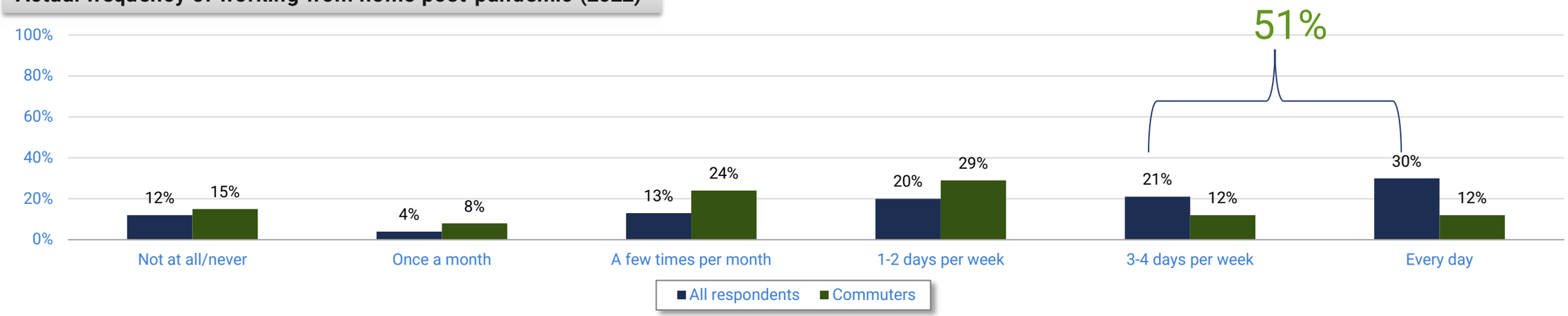
Mid-pandemic in 2020, two of five anticipated working from home at least three days a week once things returned to normal; in 2022, the reality is just over half worked from home at least three days a week

Expected frequency of working from home mid-pandemic (2020)*



Actual frequency of working from home post-pandemic (2022)



Q34: How frequently are you working from home? / *question was asked different in 2020: Assuming all goes back to normal (i.e., the way things were before the pandemic) and your employer fully accepted telework as a common practice, how frequently would you choose to work from home?

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Sustainability Initiatives and Community Engagement

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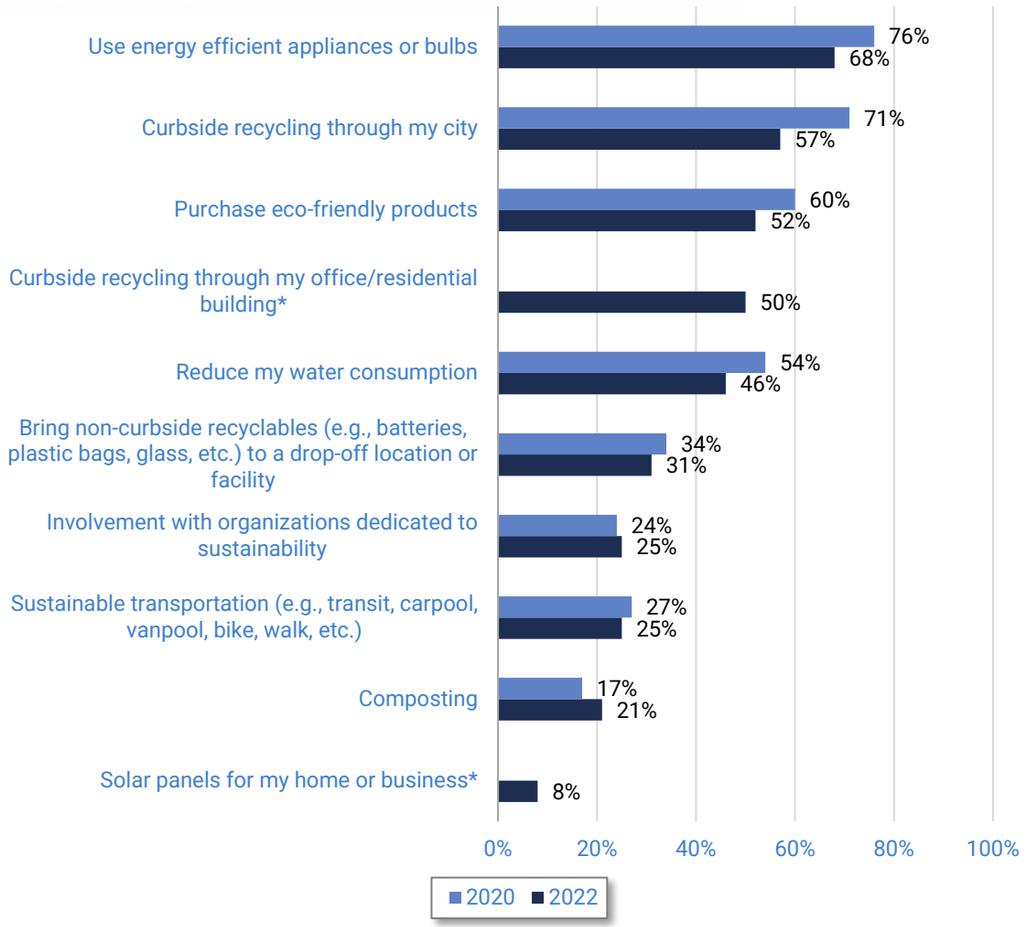
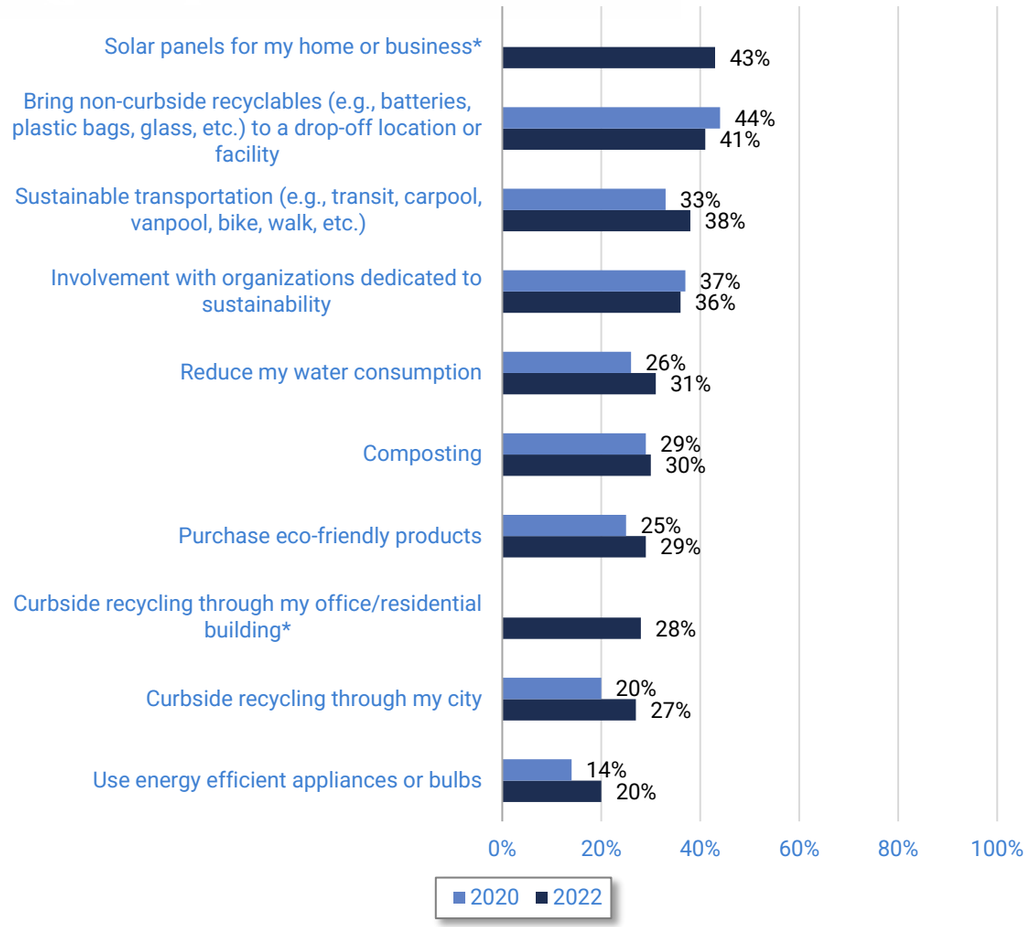
Involvement in sustainability-related practices was down across the board in 2022; interest in such practices remained similar to levels seen in 2020

Involvement in sustainability-related practices (All respondents)



Interest in sustainability-related practices (All respondents)



Q19: Thinking about each of the following sustainability-related practices, please indicate your level of interest or engagement: / *new answer options in 2022

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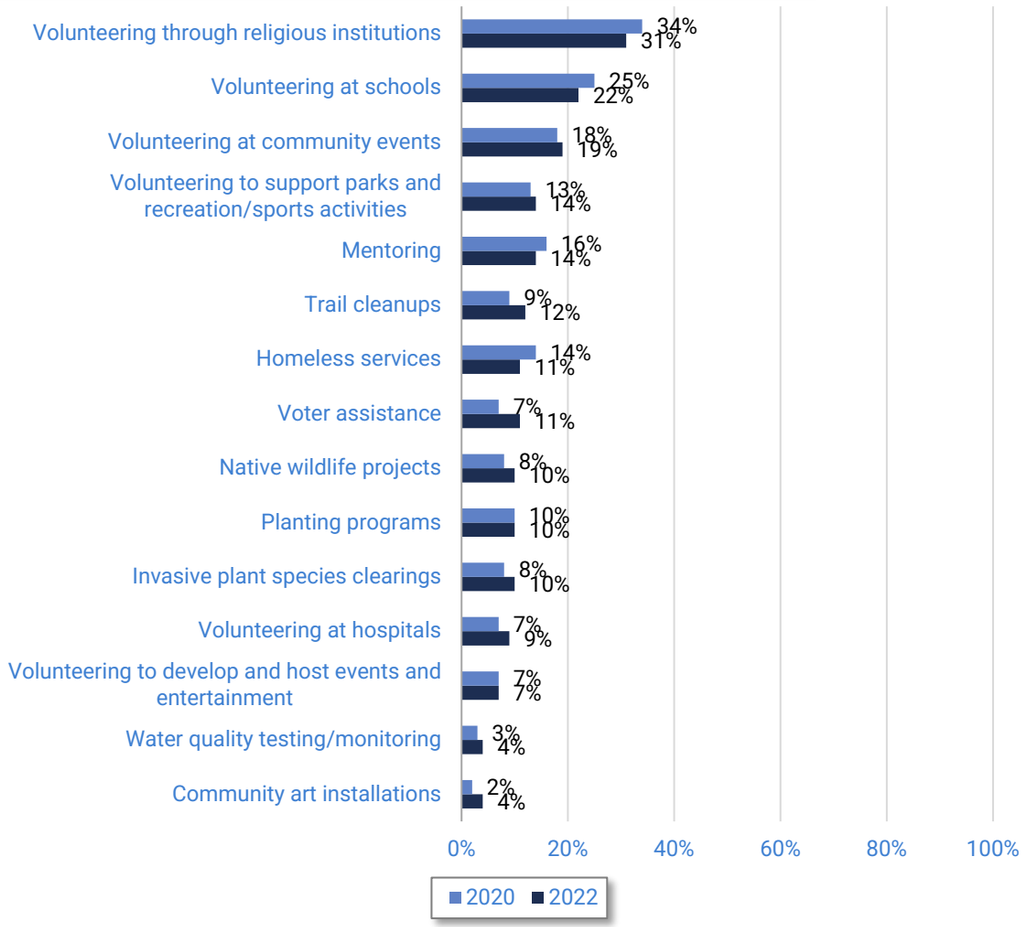
Volunteering through religious institutions and schools, and at community events remained the top three ways that people engage with community

Involvement with community activities (All respondents)



Interest with community activities (All respondents)

Q20: And for each of the following types of community engagement activities, please indicate your level of interest or engagement:

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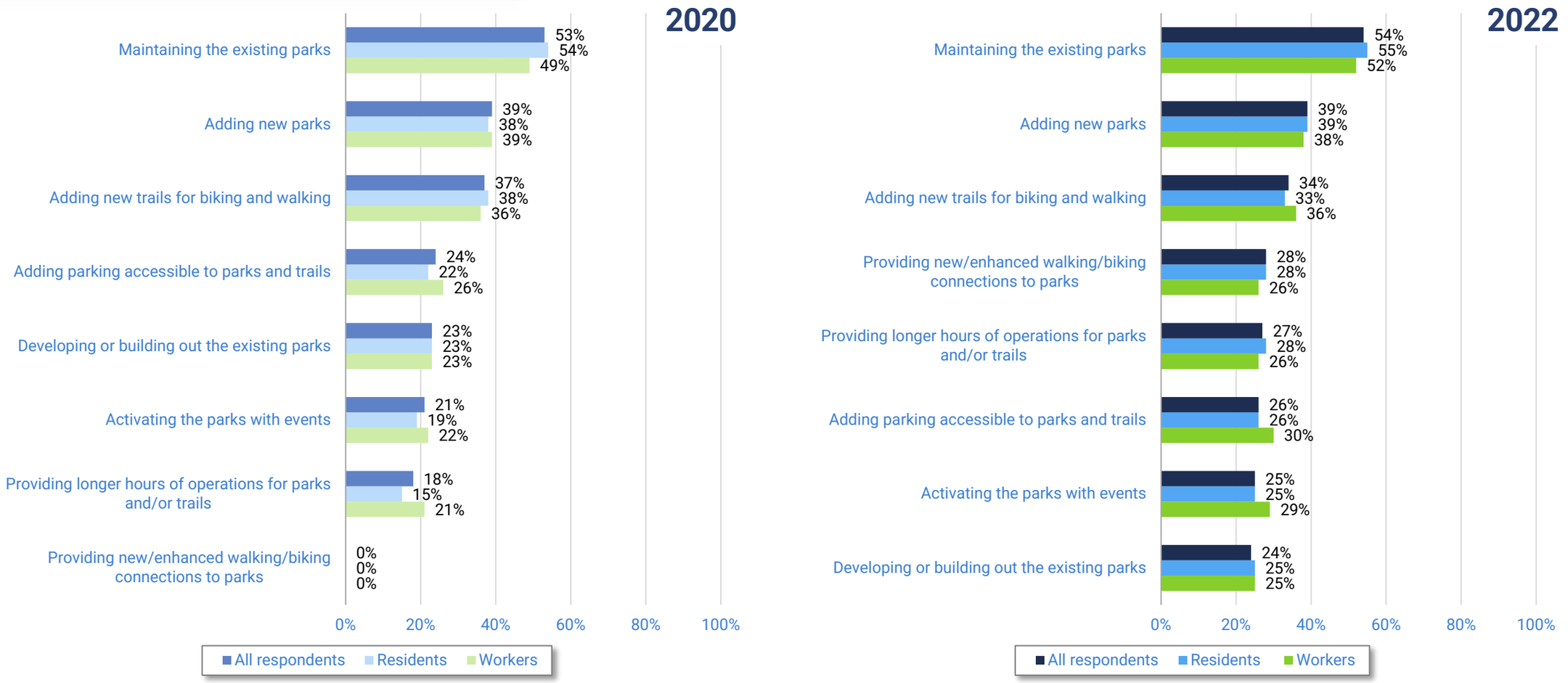
Similar to 2020, the most important park/greenspace initiative was to maintain existing parks, followed by adding new parks and adding new biking/walking trails

#1 most important park and greenspace initiative



Q21: Thinking about each of the following potential parks and greenspace initiatives that could be done in Buckhead, please rank your top three in importance.

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Awareness of and Interest in Special Initiatives

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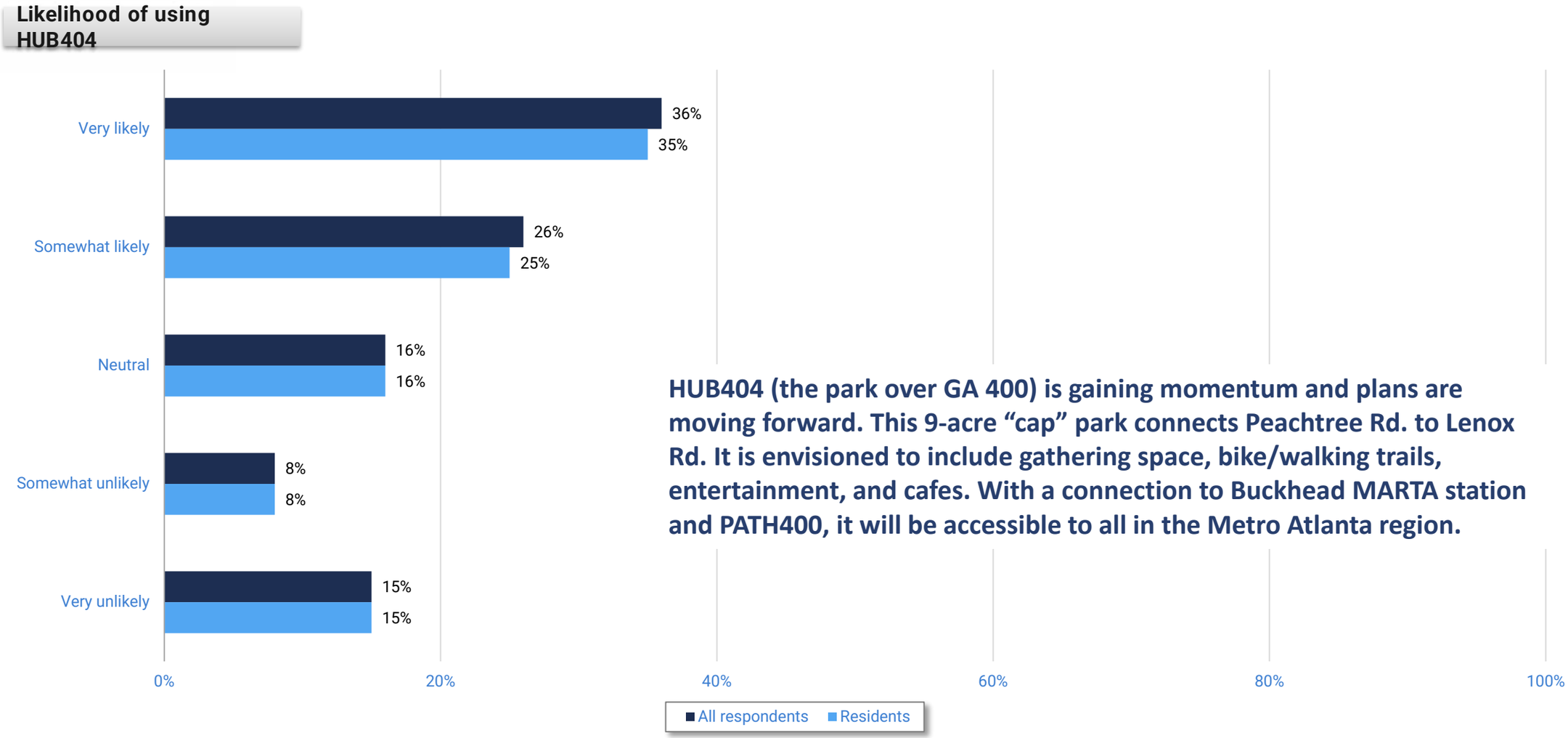
Three of five respondents said they would be likely to use HUB404



HUB404 (the park over GA 400) is gaining momentum and plans are moving forward. This 9-acre "cap" park connects Peachtree Rd. to Lenox Rd. It is envisioned to include gathering space, bike/walking trails, entertainment, and cafes. With a connection to Buckhead MARTA station and PATH400, it will be accessible to all in the Metro Atlanta region.

Q22: How likely would you be to use HUB404?

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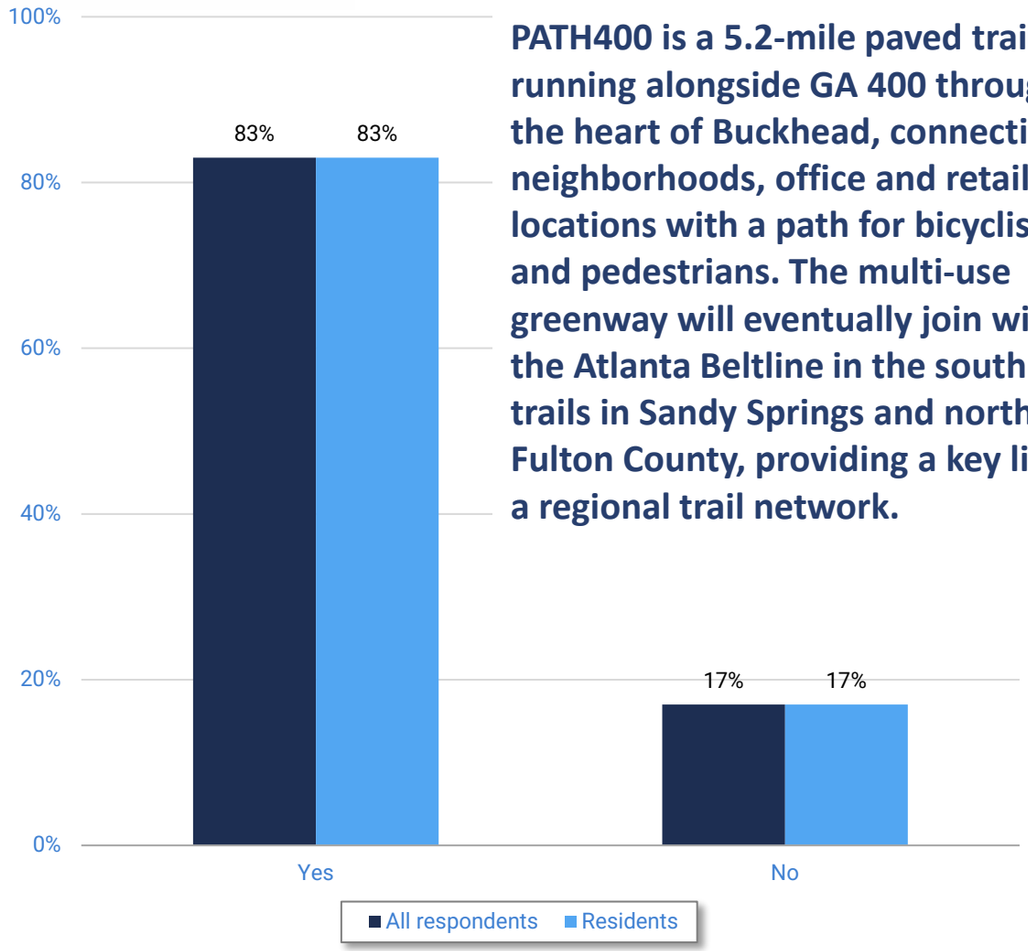
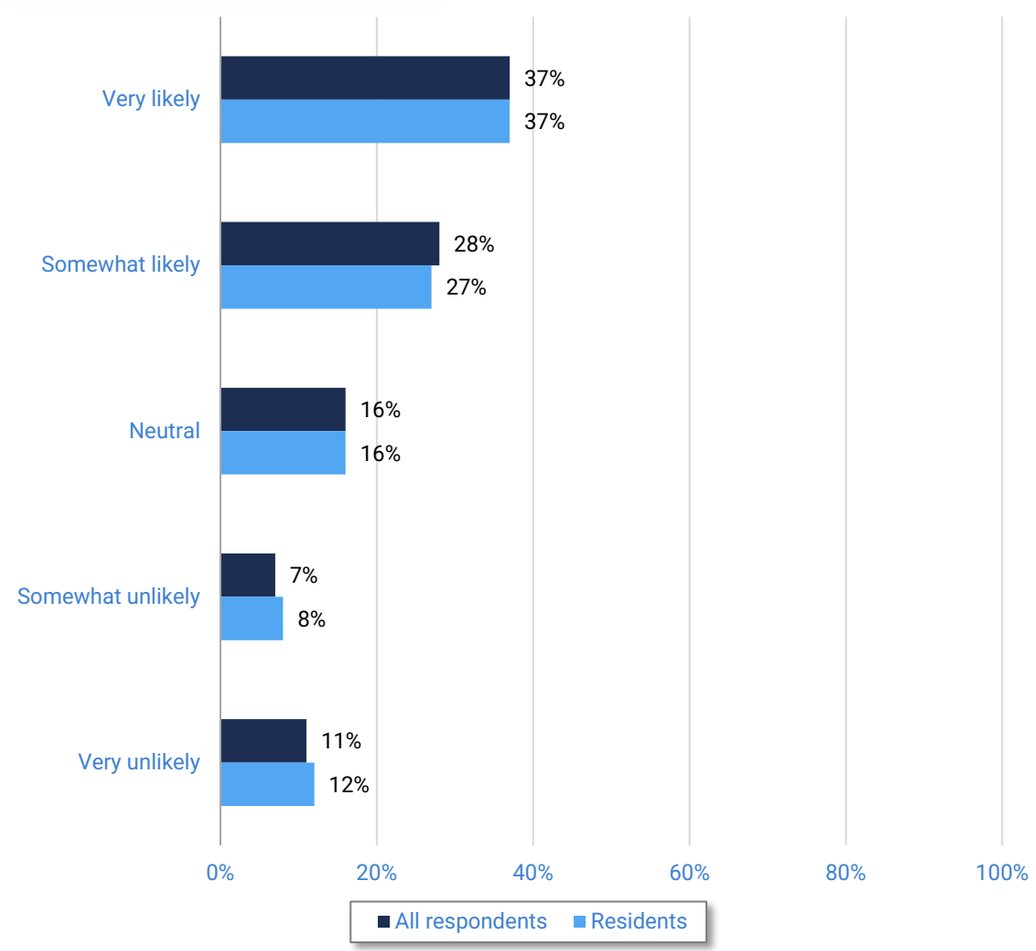
The overwhelming majority of respondents were aware of PATH400 and two of three were likely to use it

Awareness of PATH400



PATH400 is a 5.2-mile paved trail running alongside GA 400 through the heart of Buckhead, connecting neighborhoods, office and retail locations with a path for bicyclists and pedestrians. The multi-use greenway will eventually join with the Atlanta Beltline in the south and trails in Sandy Springs and north Fulton County, providing a key link in a regional trail network.

Likelihood of using PATH400



Q23: Have you heard about PATH400? / Q24: How likely are you to use PATH400?

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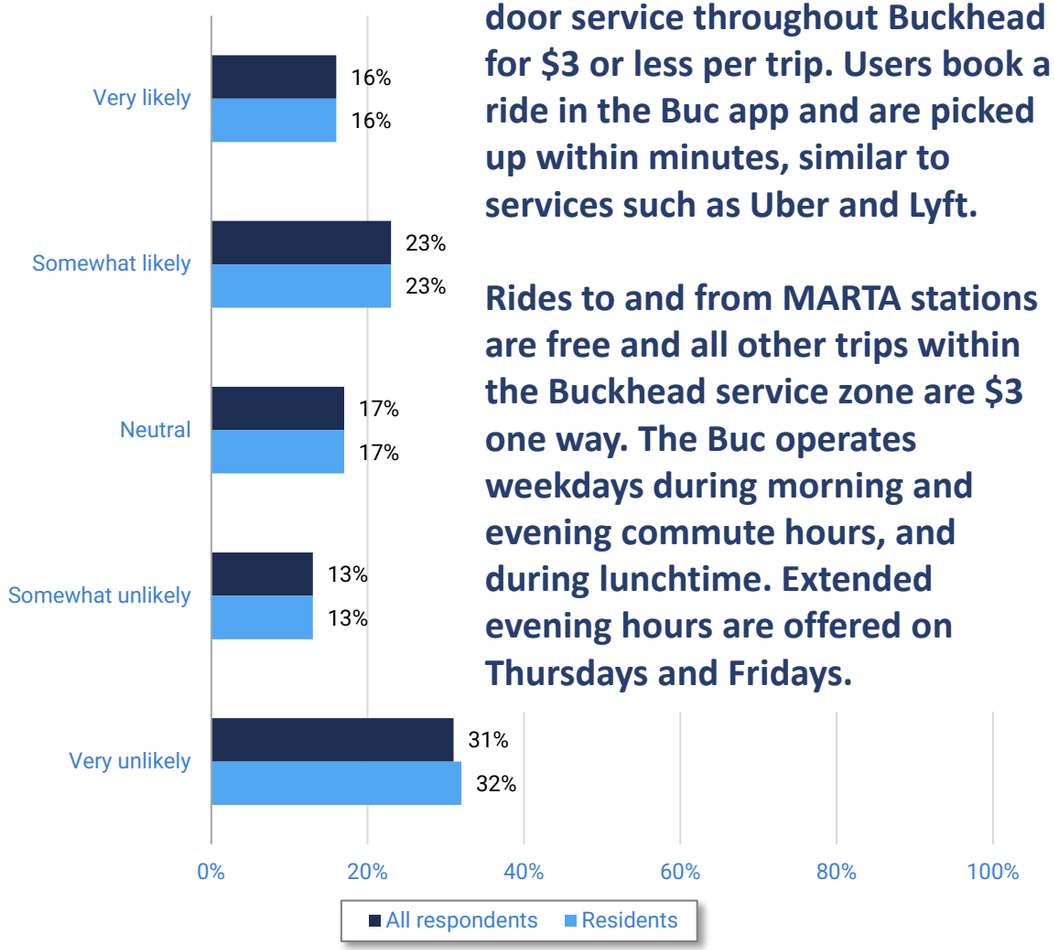
Two of five respondents said they would be likely to use Buc; those who were unlikely said it was due to a preference for driving their own car

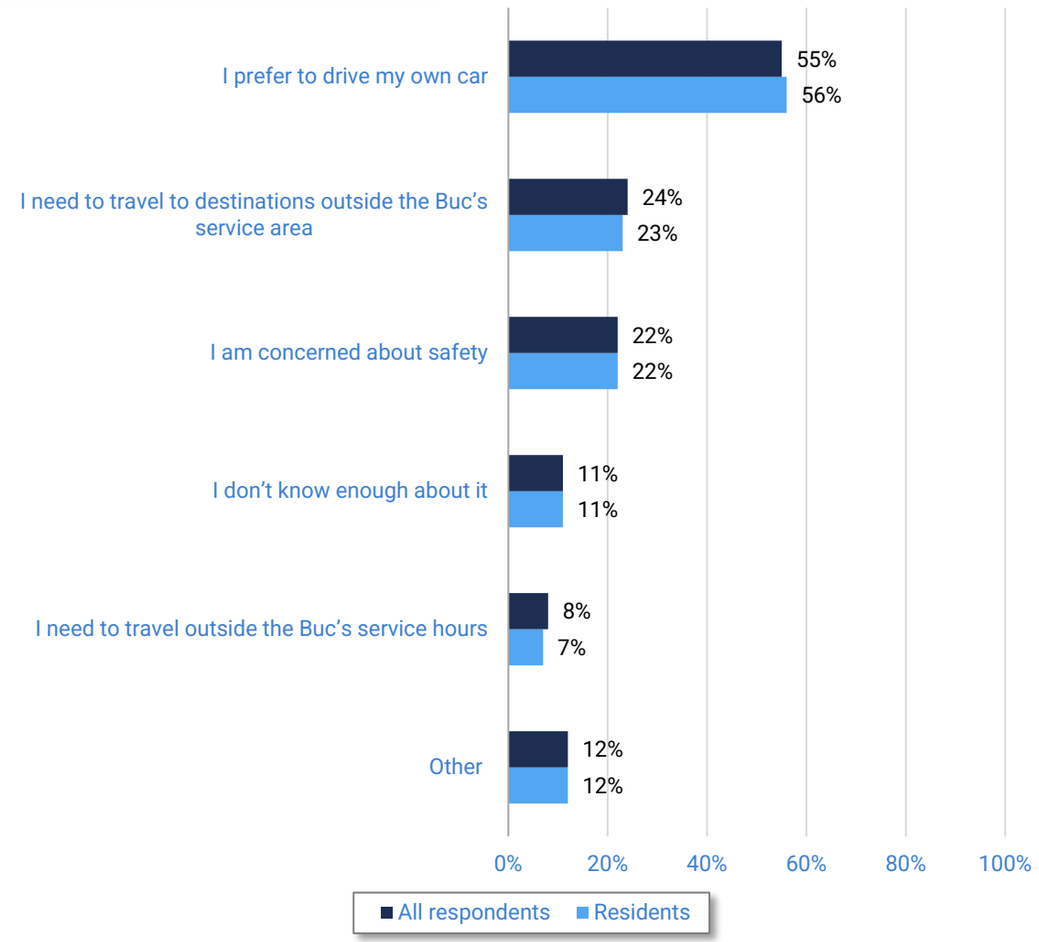
Likelihood of using the Buc



The Buc shuttle provides door-to-door service throughout Buckhead for $3 or less per trip. Users book a ride in the Buc app and are picked up within minutes, similar to services such as Uber and Lyft.

Rides to and from MARTA stations are free and all other trips within the Buckhead service zone are $3 one way. The Buc operates weekdays during morning and evening commute hours, and during lunchtime. Extended evening hours are offered on Thursdays and Fridays.

Why unlikely to use the Buc



Q25: How likely are you to use the Buc? / Q26: Why are you unlikely to use the Buc?

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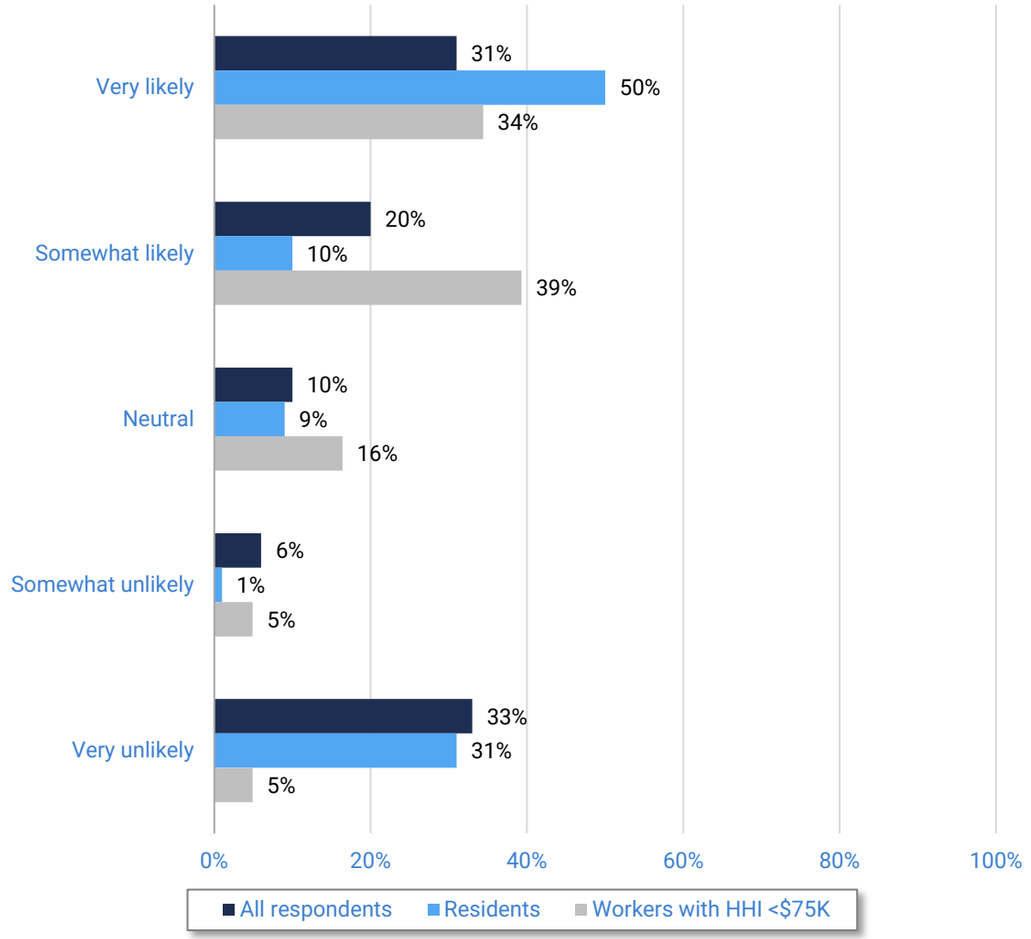
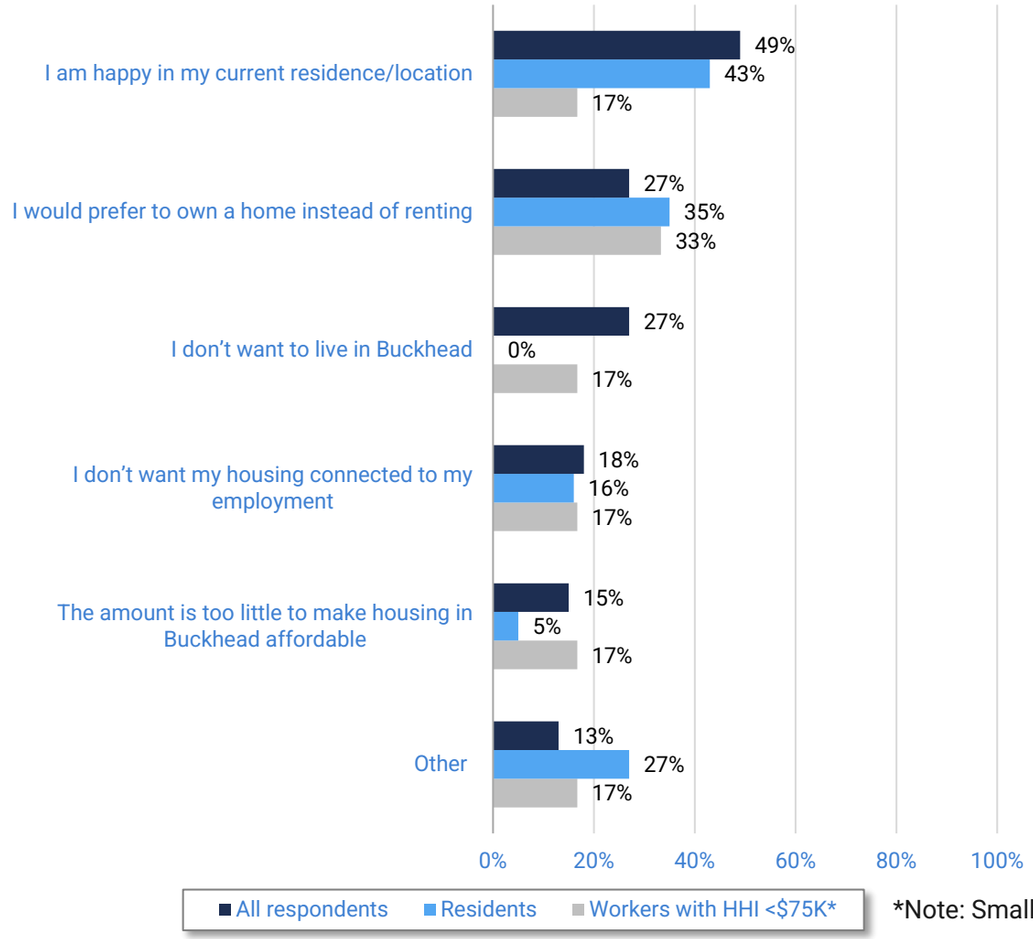
If eligible for a $450 housing subsidy, half of all respondents said they would be likely to use it, while among workers who have household incomes under $75K, this increases to almost three of four

Likelihood of using $450 housing subsidy from employer



Why unlikely to utilize subsidy



*Note: Small base n<20

Q27: If you were eligible for a monthly $450 housing subsidy from your employer to live in Buckhead, how likely would you be to use it? / Q28: Why would you be unlikely to use the $450 monthly housing subsidy from your employer to live in Buckhead?

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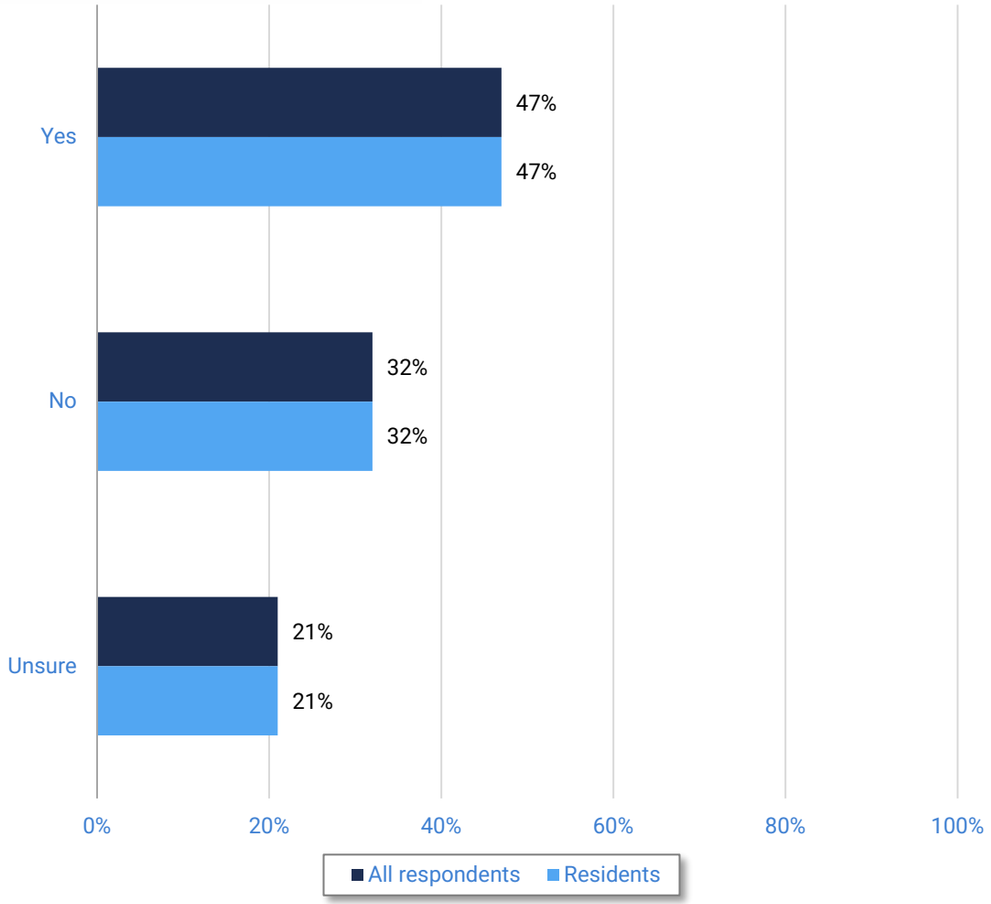
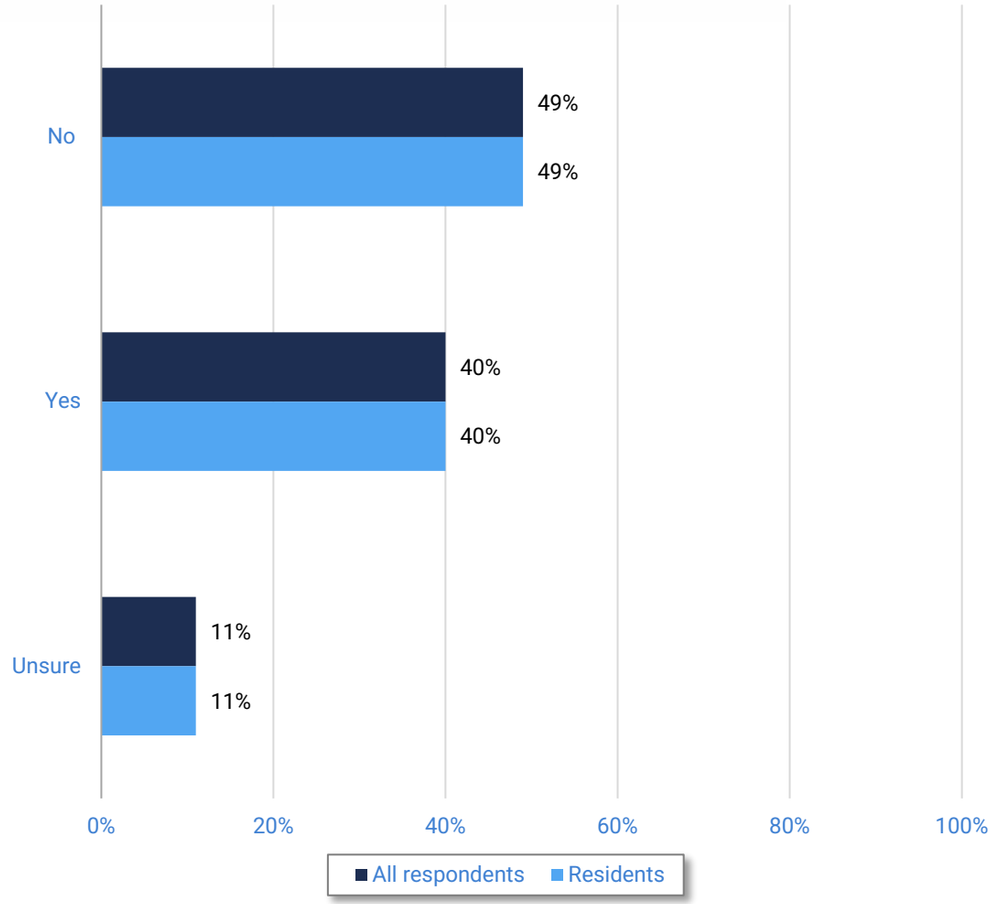
Overall, half supported the inclusion of carriage houses in Buckhead's single-family neighborhoods; half do not support increasing housing density near MARTA transit stations

Support of carriage houses



Support of increasing housing density within .5 mi of MARTA



Q39: Do you support the inclusion of accessory dwelling units (carriage houses) in single family neighborhoods in Buckhead? / Q40: Do you support increasing housing density within 1/2 mile of MARTA transit stations by allowing small apartment buildings in single family neighborhoods?

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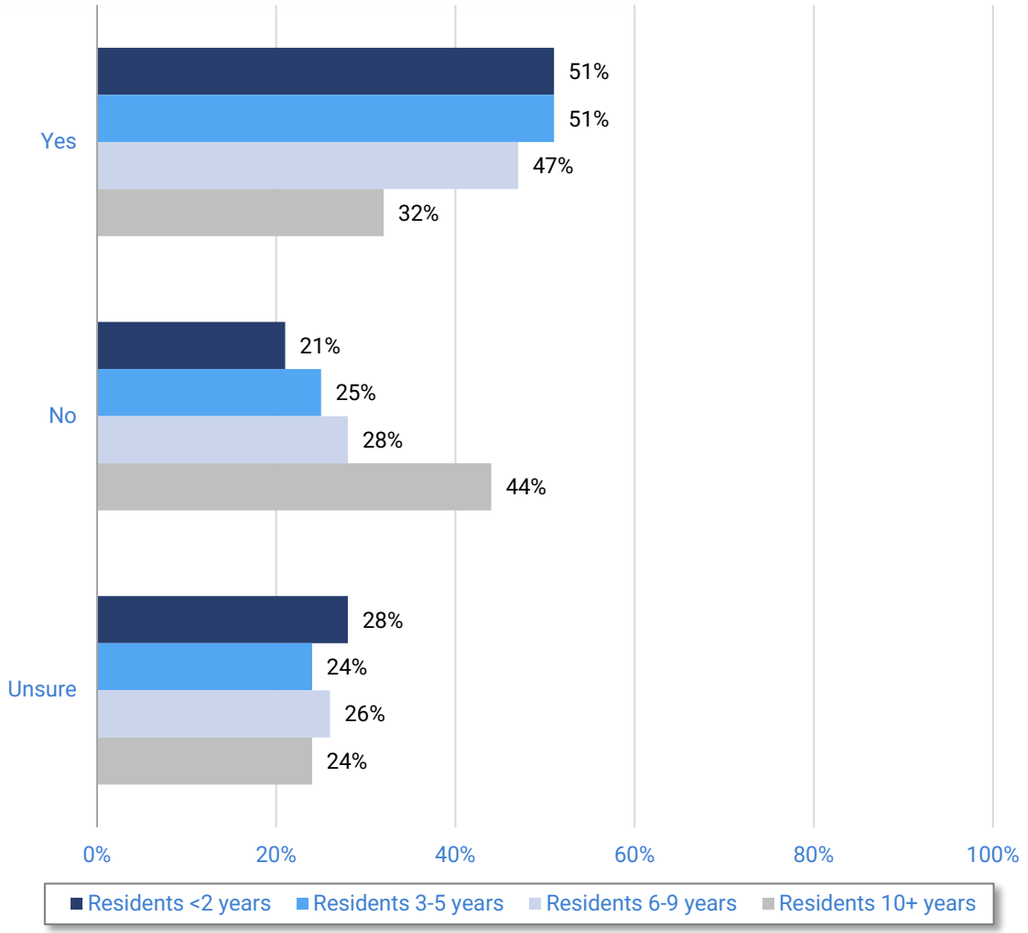
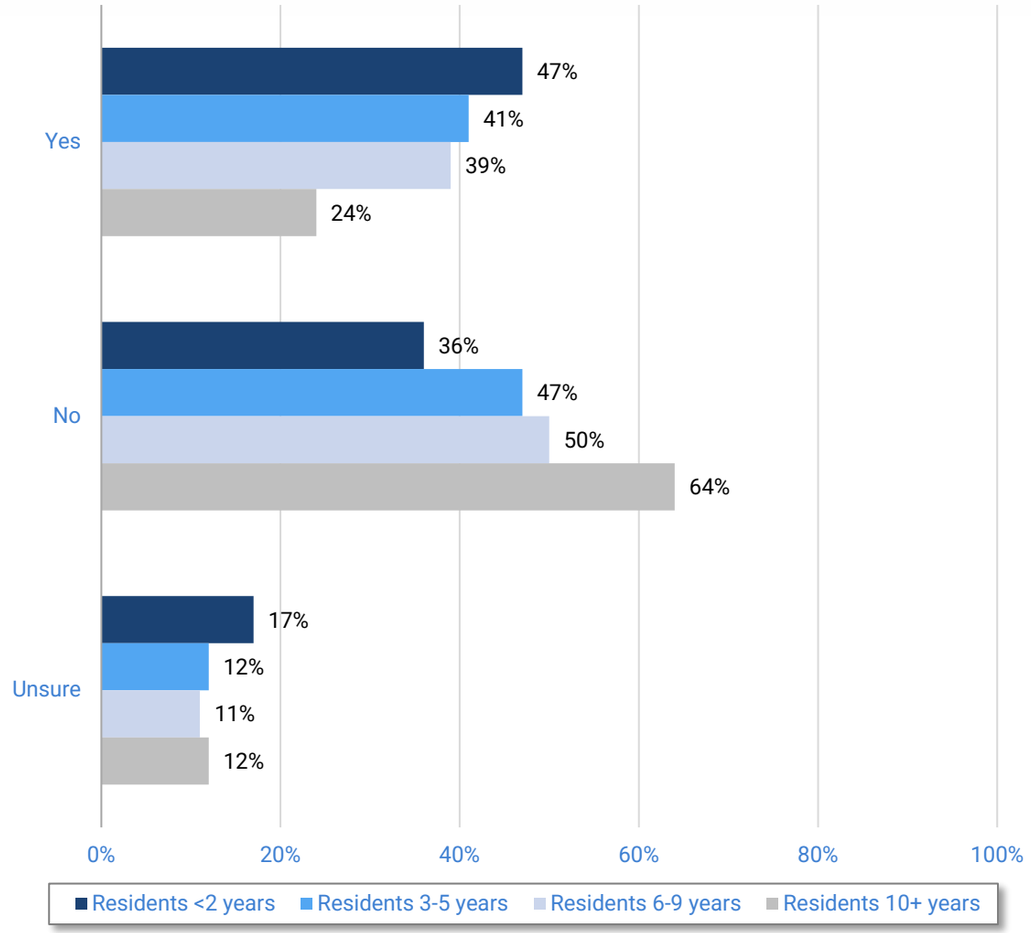
Similarly, as tenure increases as a Buckhead resident, support for carriage houses and increased housing density declines

Support of carriage houses – Residents by tenure



Support of increasing housing density within .5 mi of MARTA – Residents by tenure



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Summary of Implications and Recommendations

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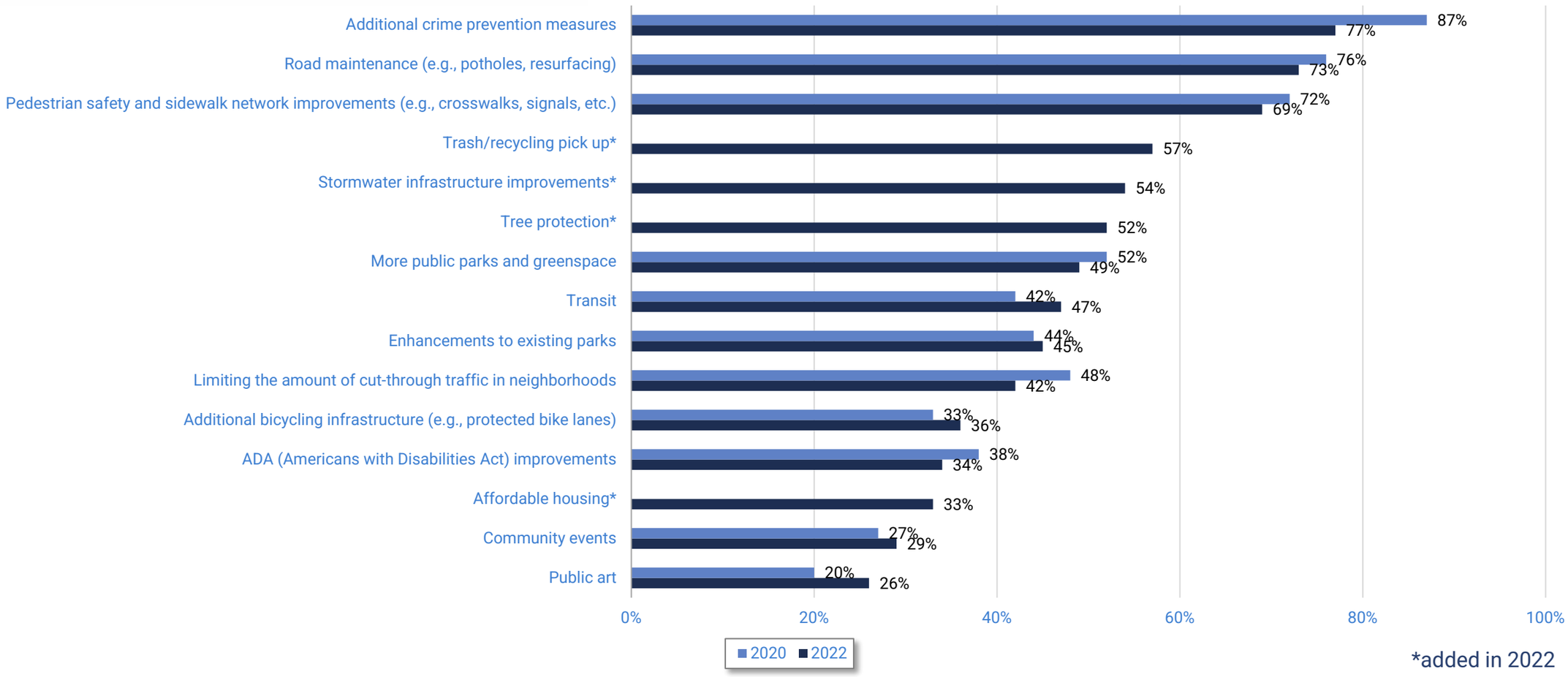
Similar to 2020, additional crime prevention measures, road maintenance, and pedestrian safety/sideway improvements were considered the three most important improvements to be made

Importance of specific improvements (Very + extremely important)



*added in 2022

Q18 Next, thinking about improvements that you feel should be made in the Buckhead community, please rate ach of the following in term of how important you consider it to be.

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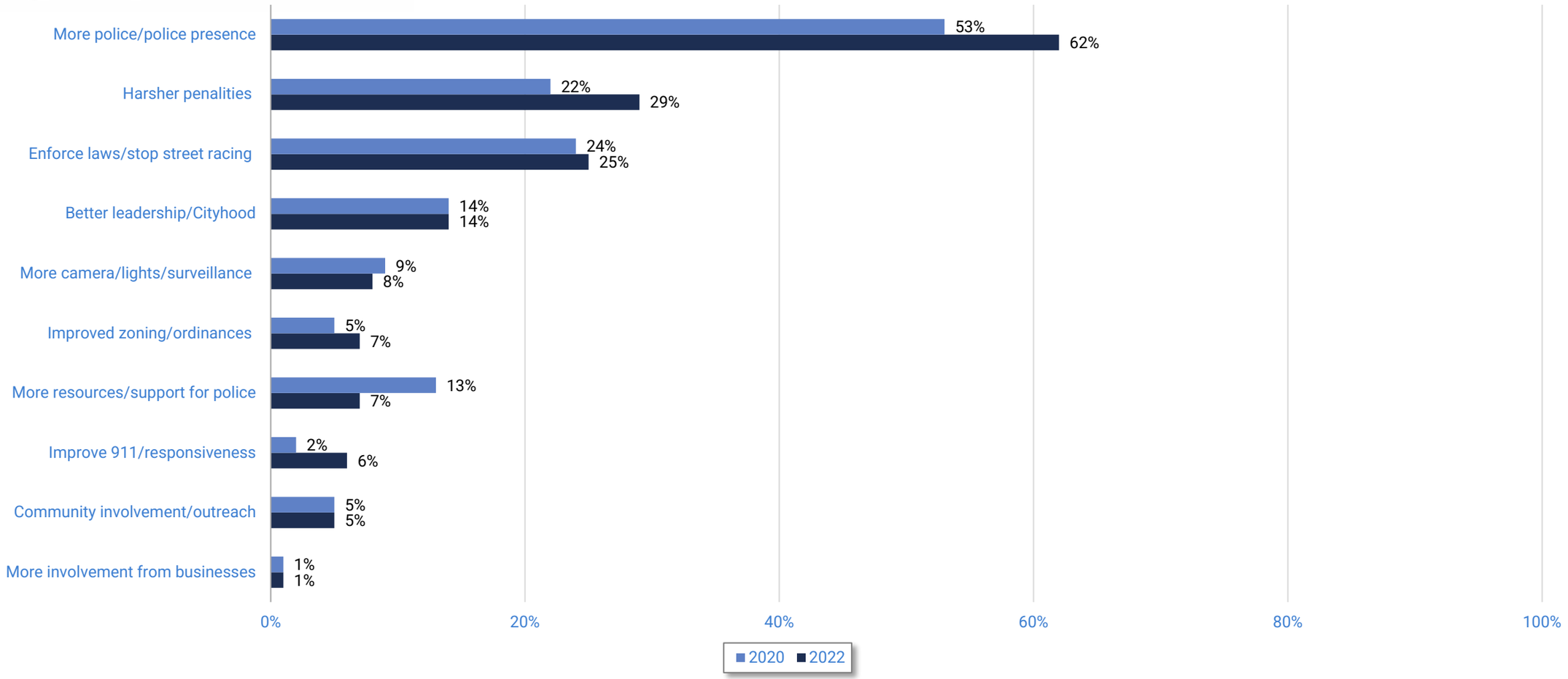
Increasing police presence, imposing harsher penalties on those committing crime and better enforcement of laws remained the top three suggestions for decreasing crime in Buckhead.

Suggestions for decreasing crime (All respondents)



Q17 What, if anything, do you feel could be done to decrease crime in your community?

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What are the current perceptions of Buckhead?

- Buckhead continues to be looked at as a prestigious, attractive place to live and work. The top reasons for locating in Buckhead remained consistent with 2020:
  - Proximity to retail and restaurants
  - Proximity to work
  - Great place to raise a family
  - Prestige of the neighborhood (valued most by 25-34 year-olds)
  - Access to better schools (valued more by 35-54 years-olds)

- Owners located their businesses in Buckhead for the same reasons in 2022 as in 2020:
  - Prestige of the neighborhood
  - Accessibility to highways and major roads
  - Proximity to retail and restaurants
  - Proximity to residences of C-suite individuals

- ***Implication: Buckhead's position as a highly attractive destination has remained steady and the reasons it is so attractive are consistent with 2020. This would indicate that residents, employers, and workers continue to value the same elements of accessibility that Buckhead offers, and that accessibility should be featured as part of the narrative around why Buckhead is such a great place to live and work.***

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What is the biggest issue facing Buckhead?

- As with 2020, crime was the strongest unaided association with Buckhead. However, that association decreased in 2022 from 13% to 11%, while associations with other positive attributes such as "beautiful/pretty/trees" and "affluent/wealth" improved.
  - The association with crime was strongest among several audiences – those who are older (55+) and established (6-9 years) residents, and females.

- However, belief that Buckhead is a safe place to live improved materially versus 2020, as 41% agreed with that statement versus 32% in 2020 and those disagreeing with the statement decreased from 56% to 43%.

- Finally, 50% of all respondents cited crime and public safety as their single most pressing issue for Buckhead.

- ***Implication: While perceptions have improved on several metrics concerning safety, it remains the top association, and therefore, the top issue facing Buckhead. Continuing to improve the reality of Buckhead's safety levels remains paramount for the immediate future.***

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How has commuting and working from home changed since 2020?

- Compared to 2020, workers are driving alone less often, while use of car and vanpools, mass transit, and walking/biking to work have all increased. Driving alone remains the number one method of getting to work by a wide margin, but those doing so have declined in numbers in 2022.
  - Among commuters, the majority still drive to work alone, but there has been a slight increase among options involving carpooling and mass transit.

- Interest in Xpress remained consistent versus 2020, with 49% of commuters saying they would be interested in using it, while half of all commuters said they would not be interested at all.

- In terms of the pandemic's impact on working at home, the reality has exceeded what people believed back in 2020. At that time, roughly two of five felt they would continue to work from home at least three days a week after things returned to normal. The reality is that just over half are currently working from home at least three days a week.

- ***Implication: Given that more individuals have continued to work from home for the majority of the work week, it might be considered surprising that driving alone to work has actually declined, given the impact of reduced traffic. However, with the increases seen in gas prices at the time of the survey, it stands to reason that more people have looked at options which could save them money on gas and driving.***

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Which initiatives generated the most interest in future use?

- The HUB404 initiative generated positive interest, with nearly two of three individuals stating they would likely use the park in the future.
- Similarly, two of three said they would be likely to use PATH400. Awareness of that initiative is strong, as 83% said they have already heard about it.
- Two of five said they would be at least somewhat likely to use the Buc (this was the same overall and among Buckhead residents), with the majority citing their preference for using their own car as the reason they would be unlikely to use it.
- Three of four people making less than $75,000 indicated they would take advantage of a $450 per month housing subsidy.
- Nearly half of both residents and overall respondents supported the inclusion of carriage houses in single family neighborhoods. Conversely, nearly half opposed the idea of increasing housing density near MARTA transit stations.
- ***Implication: Initiatives focused on improving the lifestyle options of residents generate the highest interest. Convincing Buckhead residents (and Atlanta residents in general) to look at alternative methods of transportation beyond their own cars may be shifting, but still will require consistent effort.***

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How are people engaging with their communities and practicing sustainability?

- Volunteering remains the number one way individuals engage with their community – whether it is through religious institutions, at schools, at community events, or to support parks and recreation activities. Participation has remained consistent with 2020 levels.

- The community activities which generated the strongest interest were planting and native wildlife programs, followed by supporting parks and recreation activities. Additionally, maintaining existing and adding new parks were the top two most important potential park and greenspace initiatives for Buckhead.

- Involvement with sustainability-related practices at home or work remained similar in priority/engagement but reduced across the board. Using energy efficient appliances/bulbs remained the most common practice, but declined from 76% to 68%, as an example. Other initiatives like curbside recycling saw similar declines.

- ***Implication: Volunteering remains the strongest path to engagement – both in the community and for programs involving parks and recreation. With the highest interest being shown for programs involving planting and native wildlife, as well as park and recreation activities, an opportunity exists to develop and curate more outdoor programming that can benefit individuals and families in terms of their own health and the health of their environments.***

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Recommendations

1. Maintain the focus of brand building initiatives on elements that were foundational in 2020: upscale, desirability as a home and work destination, access to the best retail and restaurants, and being a great place to raise a family.

2. To the degree possible, communicate statistics about reductions in crime or specific initiatives to shore up enforcement of laws.

3. At the same time, focus messaging around beautification efforts and improvements in the environment and its sustainability. These perceptions improved and should be highlighted.

4. Continue to generate programs which involve the opportunity to volunteer. This should remain a central element to programming and events Livable Buckhead offers and can focus on outdoor elements such as planting, wildlife, and recreation activities which could offer a combination of fun, exercise and the potential to improve the health of the individual, family, and environment.

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Recommendations

5. Grow awareness of initiatives such as HUB404 and PATH400, as they generate positive reaction and interest in use.

6. With use of mass transit increasing, explore opportunities for generating increased awareness of both the Buc and Xpress. Overcoming the routine of driving alone to work will always be a challenge, but if these two initiatives can demonstrate they reach areas which people have a need to get to, there may be a longer-term opportunity available.

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The State of Buckhead survey included questions to gauge public sentiment regarding the idea of Buckhead cityhood and the City of Atlanta government's performance.

- *Best practices for conducting community surveys are different from those used in political polls.*
- *Due to the differences, it is impossible to accurately compare results between political polls and the State of Buckhead survey.*
- *To avoid public confusion regarding these topics, the data will not be released.*

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THANK YOU!

STRATEGY // INSIGHTS // ACTION

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Experience Measurement

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