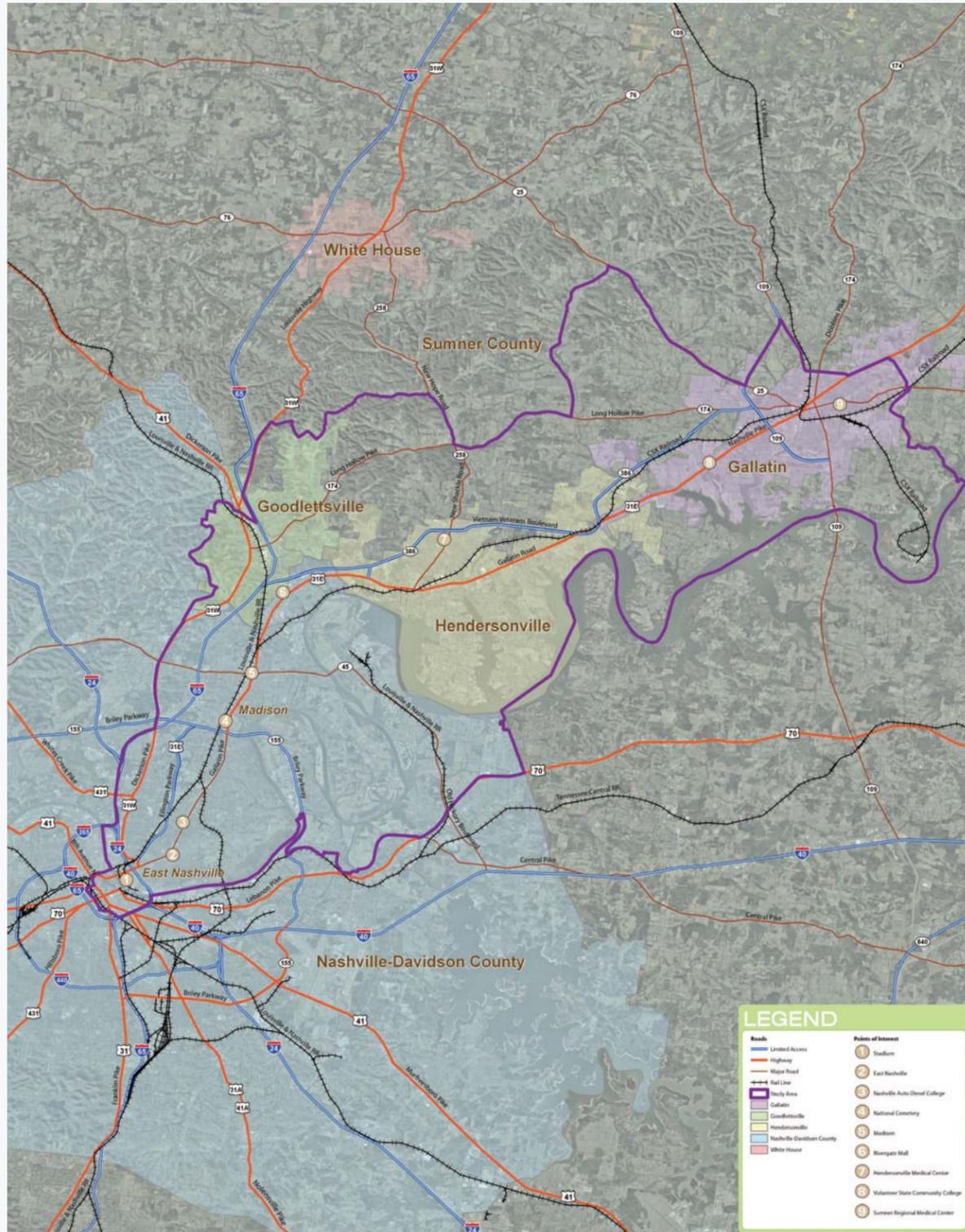


STUDY AREA

Location Map



BACKGROUND

The Northeast Corridor Mobility Study was initiated at the request of the Nashville Area Metropolitan Planning Organization (MPO). The intent of the study is to identify the current mobility challenges within the Corridor and to investigate multimodal solutions to the increasing transportation demand created by the currently projected and envisioned (preferred) future land use patterns. The Northeast Corridor encompasses an area ranging from just west of the central business district in downtown Nashville to areas in the cities of Goodlettsville, Hendersonville, and Gallatin in Sumner County.

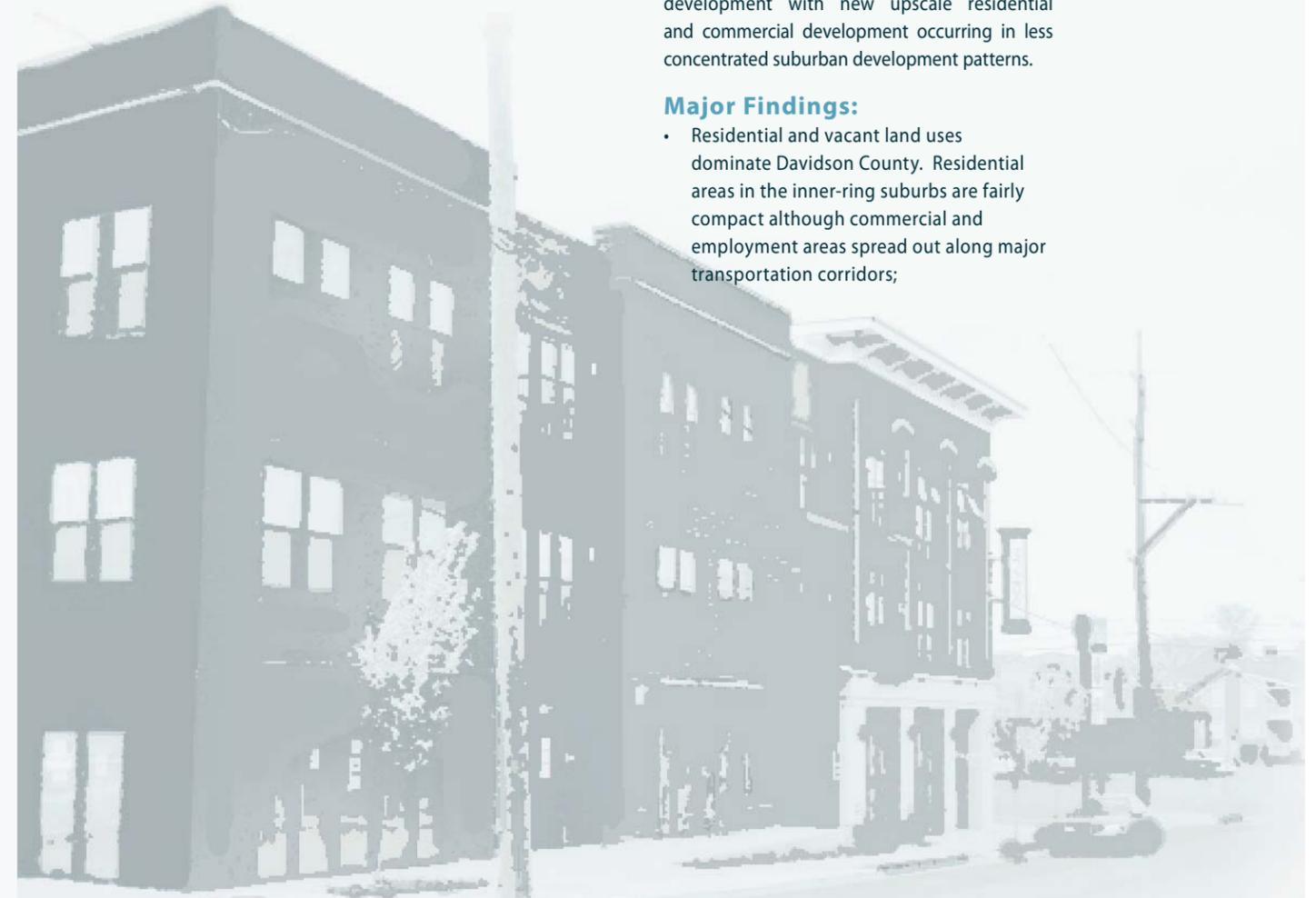
LAND USE

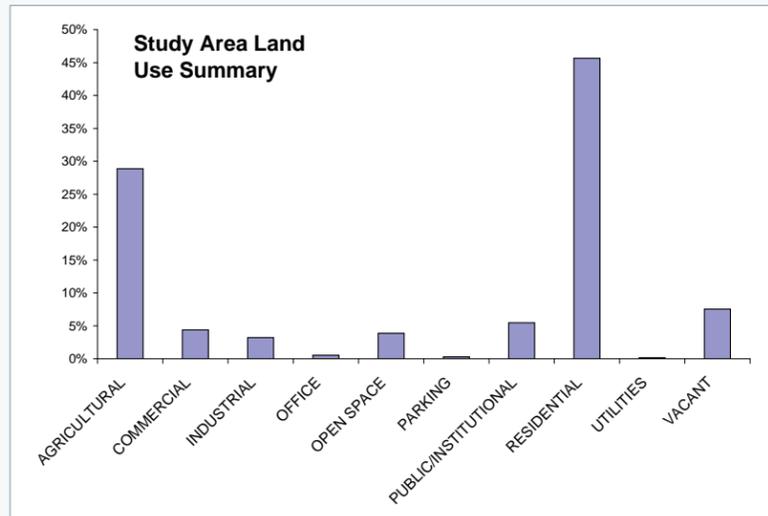
The Northeast Corridor ranges from relatively mature development in the southwest to new development in the northeast. East Nashville is slowly undergoing revitalization of its commercial areas and residential neighborhoods while maintaining a traditional, compact urban development pattern. Gallatin Pike is an important transportation corridor in the East Nashville and Madison communities and future land use plans call for concentrating development in nodal community centers with a pedestrian-oriented character.

The cities of Hendersonville and Gallatin are experiencing faster population growth and development with new upscale residential and commercial development occurring in less concentrated suburban development patterns.

Major Findings:

- Residential and vacant land uses dominate Davidson County. Residential areas in the inner-ring suburbs are fairly compact although commercial and employment areas spread out along major transportation corridors;





- Sumner County remains mostly rural, and agricultural land uses dominate. The Northeast Corridor encompasses the county's southwest corner and the county's largest concentration of population in the cities of Gallatin, Goodlettsville, and Hendersonville;
- Large amounts of developable land adjacent to the corridor will likely facilitate continued sparse development patterns;

- Little vacant land directly adjacent to the Northeast Corridor indicates the relative maturity of development on the corridor. Previously developed parcels may provide redevelopment opportunities;
- The Cumberland River limits access to destinations in the central business district and beyond;
- The cities of Gallatin and Hendersonville have plans for infill and/ or redevelopment in their downtown areas;
- The current Hendersonville Town Center Master Plan calls for locating its proposed town center off of the Northeast Corridor because of high volumes of traffic on the corridor;
- Future land use planning and development in East Nashville and Madison is focused on redevelopment and infill;
- Future land use planning in Sumner County is focused on continued decentralization and greenfield development;
- Based on current land use plans, development along the Northeast Corridor is likely to be somewhat scattered;
- Forecast 2030 population and employment densities are low relative to a downtown urban context.

TRANSPORTATION

A variety of transportation infrastructure and services currently serve the Northeast Corridor. A series of roadways parallel the corridor and offer varying levels of mobility and access. Traffic volumes are increasing along these alternate roadways and may result in higher levels of congestion. A variety of transit services are also available on the corridor including fixed route bus service, express service and park and ride lots. Several roadway and transit improvements are being considered to address the growing demands on the corridor's transportation network.

Major Findings:

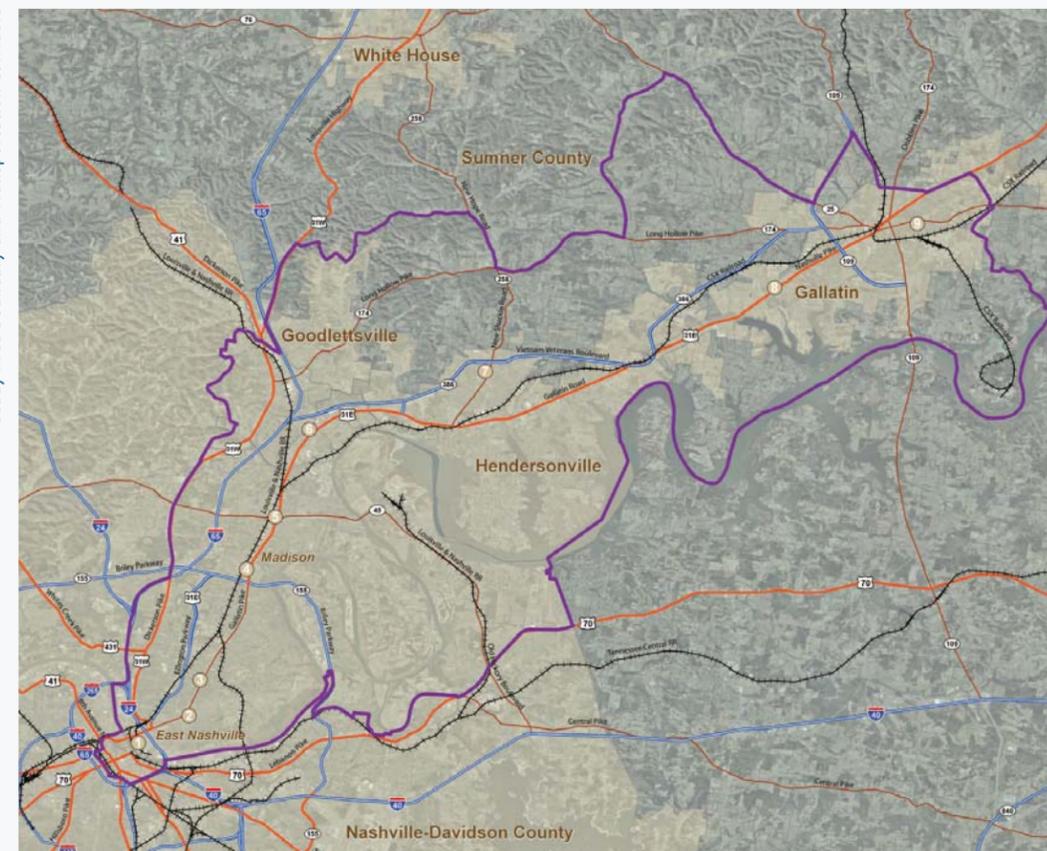
- Four north-south corridors run in parallel in the northeast Nashville area, each with different transportation characteristics: Interstate 65/ Vietnam Veteran's Blvd (SR 386), Gallatin Pike (US 31E), Dickerson Pike (SR 11), and Ellington Parkway;
- Average traffic volumes have changed on the roadways in the study area between 2000 and 2006 as shown below. It appears that some traffic was diverted from Gallatin Pike to the Vietnam

Veteran's Parkway. However, in total, the average increase in traffic volumes shown below is 6%;

- I-65 = 4% increase
- Vietnam Veteran's Parkway = 14% increase
- Ellington Parkway = 16% increase
- Gallatin Pike = 4% decrease
- Dickerson Pike = 3% decrease

- An HOV lane is currently in use on I-65 between Briley Parkway and the I-65/Vietnam Veteran's Blvd. interchange;
- CSX owns and operates a mainline railroad which travels through Downtown Nashville, Madison, Hendersonville, and Gallatin;
- In 2005, between Downtown Nashville and Madison there were about 96 trains per day using two existing tracks. Between Madison and Gallatin there were about 32 trains per day using one existing track. This indicates a heavily used freight corridor;

Study Area Boundary and Transportation Corridors





The Northeast Corridor presents a variety of land uses and urban design characteristics. Above are photos of the Cumberland River, a modern redevelopment, and Rivergate Mall.

- MTA currently provides Route 26 bus service between downtown Nashville and Rivergate Mall. In 2004 it carried 10% of all fixed route customers in the MTA's network and was the route with the overall highest ridership. 2007 data indicates substantially increased ridership;
- Bus service is also provided via Route 35x which extends from downtown Nashville to Hendersonville with service provided in the morning and evening rush hours;
- Five park and ride lots are provided in the study area for bus transfers and car and van pools. These lots are located at the Madison Kmart, Madison Square, Hendersonville RTA, New Shackle Island (Hendersonville), and Rivergate Mall. In total, over 250 parking spaces are available;
- According to a 2006 survey, 54% of the MTA transit riders had no working vehicle and 74% had incomes less than \$15,000 per year indicating a heavily transit dependent customer base;
- Currently, no fixed route bus service extends from Davidson County to the City of Gallatin;
- The CSX corridor (together with the Clement Landport), and the four roadway corridors discussed above (Interstate 65/ Vietnam Veteran's Blvd-SR 386, Gallatin Pike-US 31E, Dickerson Pike-SR 11, and Ellington Parkway) will all be considered for transportation improvements within the study area.

DEMOGRAPHICS & ECONOMICS

As part of the Northeast Corridor Mobility Study, demographic and economic indices and current real estate market conditions were examined. This market profile covers four major geographies, including the State of Tennessee; the Nashville-Davidson-Murfreesboro Metropolitan Statistical Area (MSA); Davidson County; and Sumner County. Key metrics such as household growth, consumer spending, and employment growth were surveyed as critical barometers of demand for new growth and development.

Population Growth:

- Because Davidson County is nearing buildout, it is growing more slowly than outlying jurisdictions such as Sumner County. Since 2000, Davidson County's population increased by only 9,600, or just 1.7%, —to 580,000 residents in 2007;
- Over the next five years, Davidson is forecast to continue growing slowly, primarily from immigration of foreign-born populations. This is expected to add 10,000 new people by 2012—to 590,000 residents (this reflects a generally nominal growth rate of less than 0.5 percent per year);
- MPO's long-term forecasts suggest Davidson's population will increase by 98,000 residents between now and 2030. This would translate into an average annual growth rate of 0.7 percent per year—only slightly higher than the near-term forecasts above;
- Sumner County has grown rapidly as a result of significant new residential and commercial development over the past 15 years. In fact, Sumner County's population expanded by more than 20,000 since 2000—to 151,400 residents in 58,000 households in 2007;
- Over the next five years, forecasts suggest that Sumner's growth will moderate—expanding the County's population by 12,800, to 164,000 residents in 63,700 households by 2012 (this reflects a strong growth rate of 1.7 percent per year);
- MPO's long-term forecasts suggest Sumner's population will increase by 57,700 residents between now and 2030; The MPO forecasts suggest that the pace of growth in Sumner over the next 23 years will remain at generally the same level as it has over the recent past;

Economic Profile:

- Metropolitan Nashville created 13,500 new jobs every year between 2001 and 2006. While Davidson County added new jobs, its growth rate lagged the metropolitan area while Sumner County exceeded the region's rate, suggesting that new jobs are being generated in a decentralized manner away from the core to outlying parts of the area;
- The MPO forecasts that Davidson County will gain 221,000 new jobs by 2030, which translates into a sustained annual pace of 9,600 new jobs per year. By comparison, MPO forecasts that Sumner County will add 33,600 new jobs by 2030—meaning that Sumner will generate roughly 1,500 new jobs every year;

Residential Development:

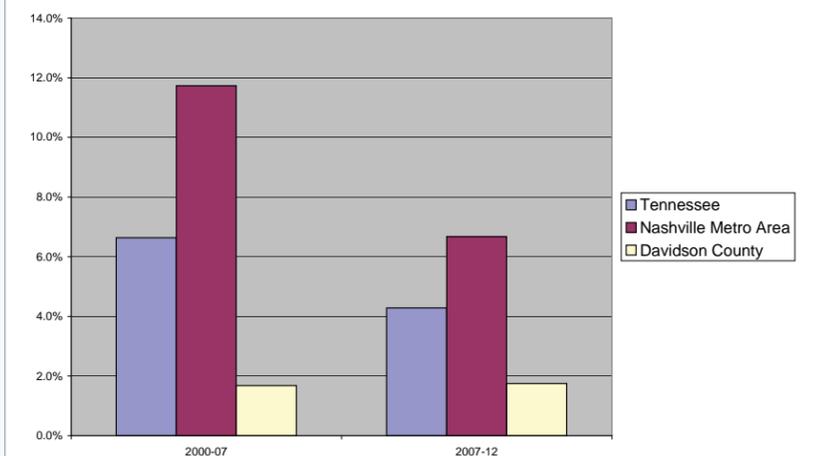
- Between 1996 and 2006, Davidson County issued 45,700 permits for new housing development, reflecting a moderate pace of 4,200 permits per year; the majority of Davidson's activity is for single-family detached units;
- Sumner County issued 15,700 permits, reflecting a strong annual pace of 1,600 permits per year; fully 89 percent of new housing activity in Sumner is single-family detached, with multi-family apartments comprising only 150 permits per year;

Commercial Development:

- The NE Corridor study area falls in a number of commercial real estate "submarkets" as defined by professionals in the real estate industry, which vary based on use, locational characteristics such as highways, physical barriers such as Old Hickory Lake, and concentrations of specific types of development, among other variables. The planning team is currently assembling land use information on the amount of commercial and residential real estate located in the study area;
- For office development, the study area straddles three office submarkets—Downtown Nashville, Airport North, and North Nashville, which collectively contain 10.8 million sq. ft. of office space—35 percent of the region's office inventory. Leasing activity ("net absorption") was limited to 107,000 sq. ft. in 2007; current office vacancies range from six to 20 percent;

- The industrial submarkets included in the study area (Elm Hill Pike/I-40 East, I-65 North) contain 57.6 million sq. ft. of industrial space—38 percent of the region's inventory. Industrial space requires transportation infrastructure, including ready access to air, freight, rail, and highways to ensure its overall viability. Net absorption totaled 383,600 sq. ft. in 2007, with Elm Hill Pike accounting for half of the entire metropolitan area's leasing activity;
- Over 2.7 million sq. ft. of industrial space is under construction in the Elm Hill Pike submarket in the study area. Brokers report that limited truck and freight access (particularly in the area surrounding Rivergate Mall) are impediments to continued industrial development in this submarket;
- Sumner County's industrial uses are concentrated in warehousing and manufacturing, which are "horizontal" and land consumptive in nature. Tenants typically seek locations with lower land and real estate costs in outlying (or emerging) locations of a metropolitan area such as Sumner;
- The corridor runs through the Madison/Goodlettsville retail submarket, one of the region's largest retail submarkets with 3.6 million sq. ft. of retail space. Others include Henderson/Gallatin, with 2.7 million sq. ft. of retail inventory;
- More than 941,500 sq. ft. of new retail space is under construction in the Henderson/Gallatin submarket, such as The Streets at Indian Lake in Indian Lakes Village.

Percent Population Growth: Past and Projected



URBAN DESIGN

The urban design characteristics of the Northeast Corridor represent a continuum of development patterns representative of time periods as the region has expanded over the last 50 years. Each community has small commercial nodes that formed their original town centers. Connecting these nodes are various scales of strip commercial. The scale of these strip commercial areas is smaller within the segment between Nashville's CBD and Madison. With the exception of large grocery store developments, the size of these developments is typically under an acre with less than 100ft of street frontage. Larger strip commercial developments are more characteristic of the segments around the Rivergate Mall. These developments commonly include 3 or more acres with street frontage exceeding 150ft. Indian Lake Village in Hendersonville, a large office, residential, and retail center currently under construction, has begun to introduce a large-scale multi-use development pattern to the north Hendersonville portion of the corridor.



From top to bottom, photos of the corridor at Goodlettsville, Hendersonville, and Inglewood

Major Findings:

- The majority of the corridor's urban form and scale is almost exclusively oriented toward the automobile;
- Within older areas, vehicular access to individual properties is typically uncontrolled while access to newer developments is characterized by individual curb cuts to each parcel.
- With the exception of the few commercial nodes, most structures are not built to the street. Parking is predominantly located in the front of the property between the sidewalk and the entry to the building.
- Pedestrian facilities (i.e. sidewalks, crosswalks) are limited within the corridor.
- The scale of development is low. One-story low-rise buildings typically characterize the corridor.
- Each community has a small core of Pre-1950 buildings that are distinctly different than the rest of the corridor.
- Many of the communities (i.e. Nashville, Goodlettsville, Hendersonville, Gallatin) have adopted new zoning and design guidelines that are more form based for some portions of the corridor within their jurisdiction. These efforts encourage more urban multi-modal friendly development patterns.

SOURCES

Land Use:

- Geographic Information Systems (GIS) data provided by the Nashville Area Metropolitan Planning Organization
- Nashville/ Davidson County Mobility 2030
- Gallatin Pike Improvement District
- Sub Area 4: 1998 Update
- East Nashville Community Plan 2006 Update
- Detailed Neighborhood Design Plan for Cleveland Park, McFerrin Park, and Greenwood Neighborhoods
- Detailed Neighborhood Design Plan for East Hill, Renraw, and South Inglewood (West) Neighborhoods
- Nashville Auto Diesel College Master Plan
- Goodlettsville Major Thoroughfare Plan Study
- Goodlettsville Streetscape Plan
- Town Center Master Plan, November 2005; Hendersonville Tomorrow, 2007
- Gallatin General Development and Transportation Plan, 1996
- Gallatin Future Land Use Map
- Gallatin Urban Growth Boundary Plan, 1999
- Gallatin Major Thoroughfare Plan, 2000
- SR-386 Access Management Plan, 2005
- Gallatin Transit Feasibility Study, 2005
- City of Gallatin, Greenway Master Plan, 2006

Transportation:

- Nashville MTA
- U.S. Department of Transportation
- Tennessee Department of Transportation, TRIMS data

Demographics and Economics:

- U.S. Census Bureau, 2000
- U.S. Department of Labor, Bureau of Labor Statistics
- U.S. Census Bureau, Local Employment Dynamics
- State of Tennessee Department of Labor
- Scan US
- Nashville Metropolitan Planning Organization, population and employment forecasts
- CB Richard Ellis Real Estate Market Data
- Greater Nashville Association of Realtors

Urban Design:

- Field surveys of Northeast Corridor
- Davidson County & Nashville County tax parcel data



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