



Nashville Area Metropolitan Planning Organization Tri-County Transportation & Land Use Study of Robertson, Sumner, Wilson Counties

**Community at Large Sessions: Challenges and Opportunities
September 30, October 1-2, 2008**



**LandDesign • Kimley-Horn & Associates, Inc.
Basile Baumann Prost Cole & Associates, Inc. • Sterling Communications**



The Project Team

Nashville Area Metropolitan Planning Organization

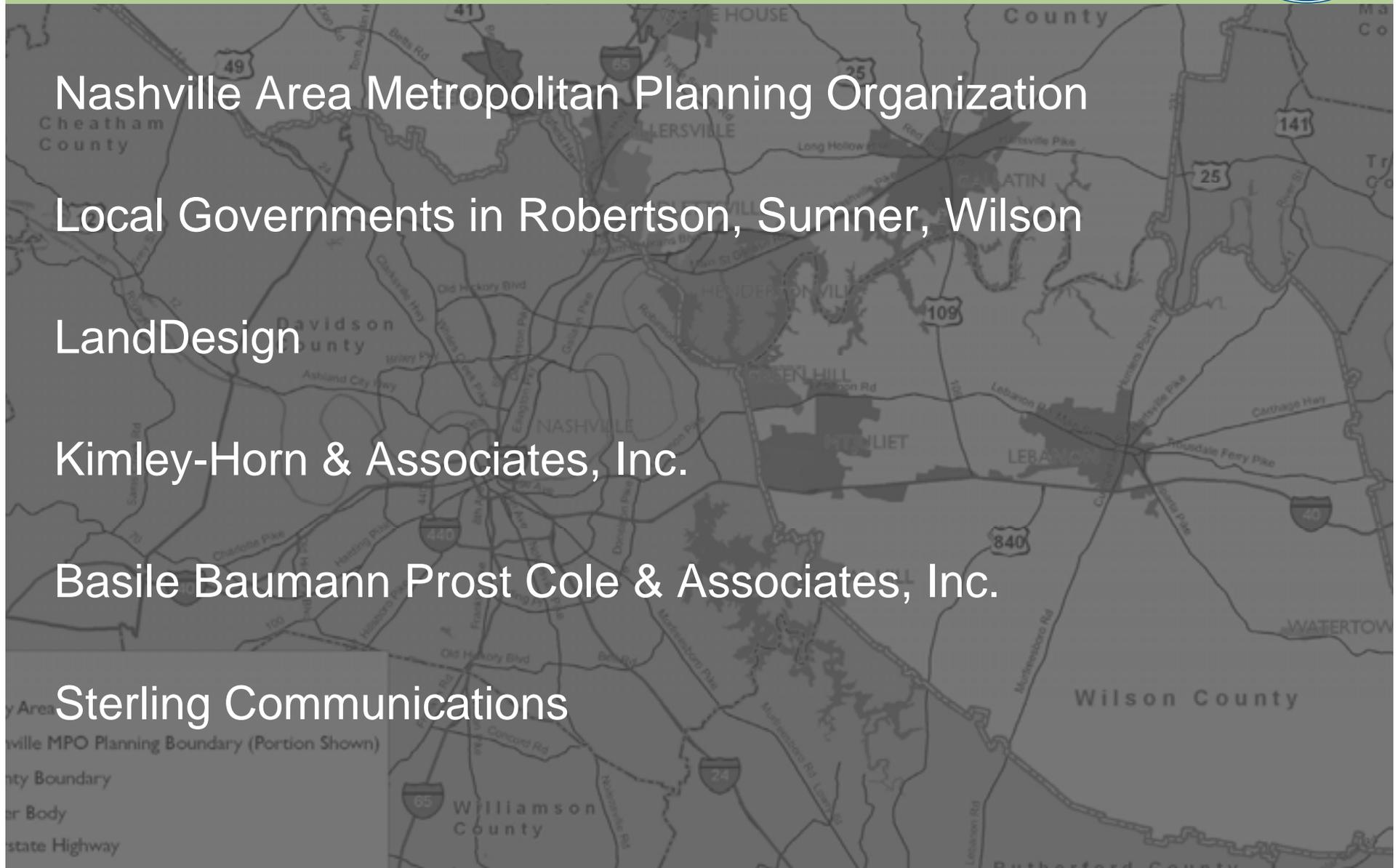
Local Governments in Robertson, Sumner, Wilson

LandDesign

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Sterling Communications



Purpose – Why are we here?

- To bring local governments, citizens, and businesses together to talk about growth issues.
- To create a forum for local leaders to consider growth plans of their neighboring communities for regional mobility and prosperity.
- To generate ideas for the 2035 Regional Transportation Plan, scheduled for adoption in Fall 2009.

Agenda



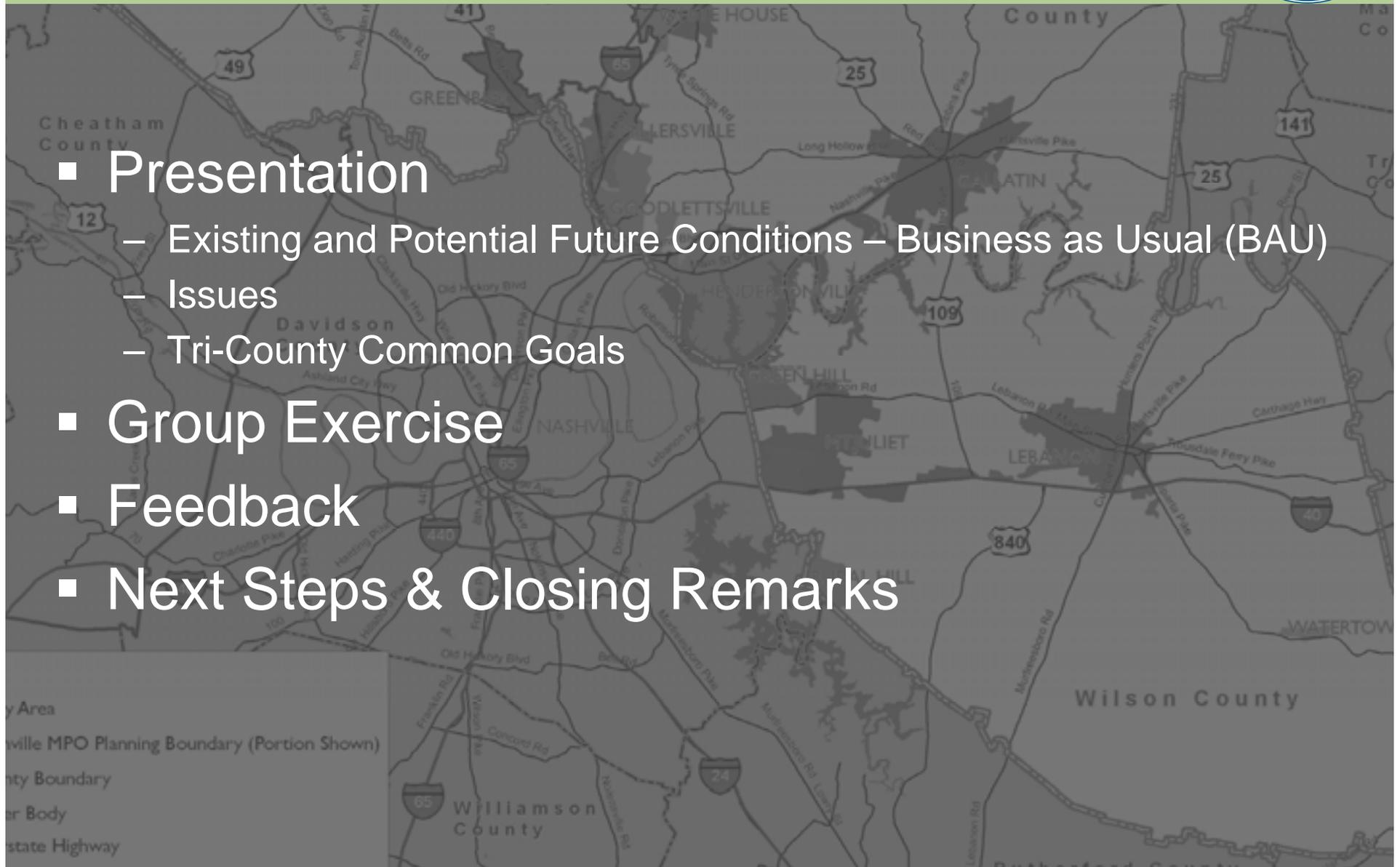
- Presentation

- Existing and Potential Future Conditions – Business as Usual (BAU)
- Issues
- Tri-County Common Goals

- Group Exercise

- Feedback

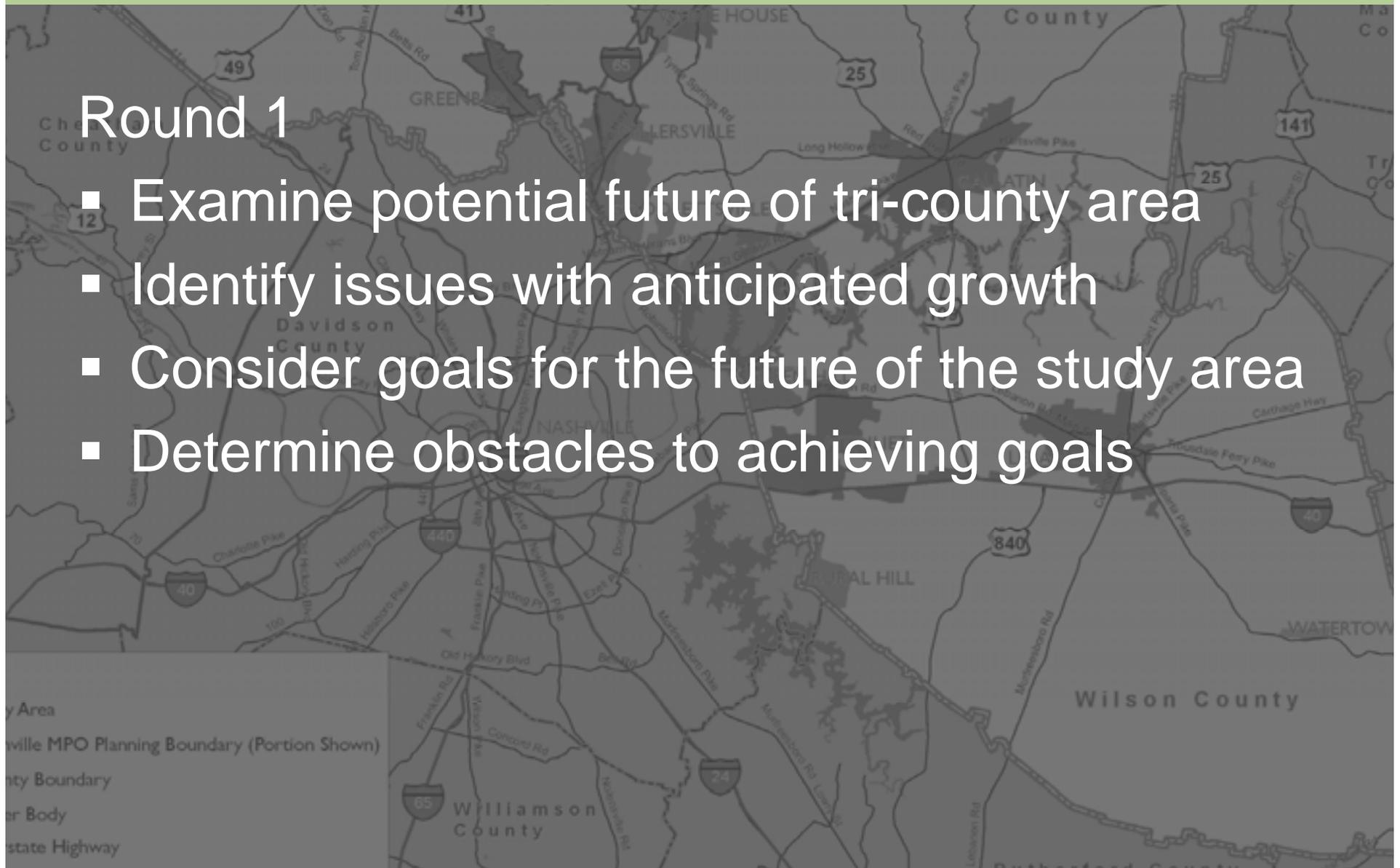
- Next Steps & Closing Remarks

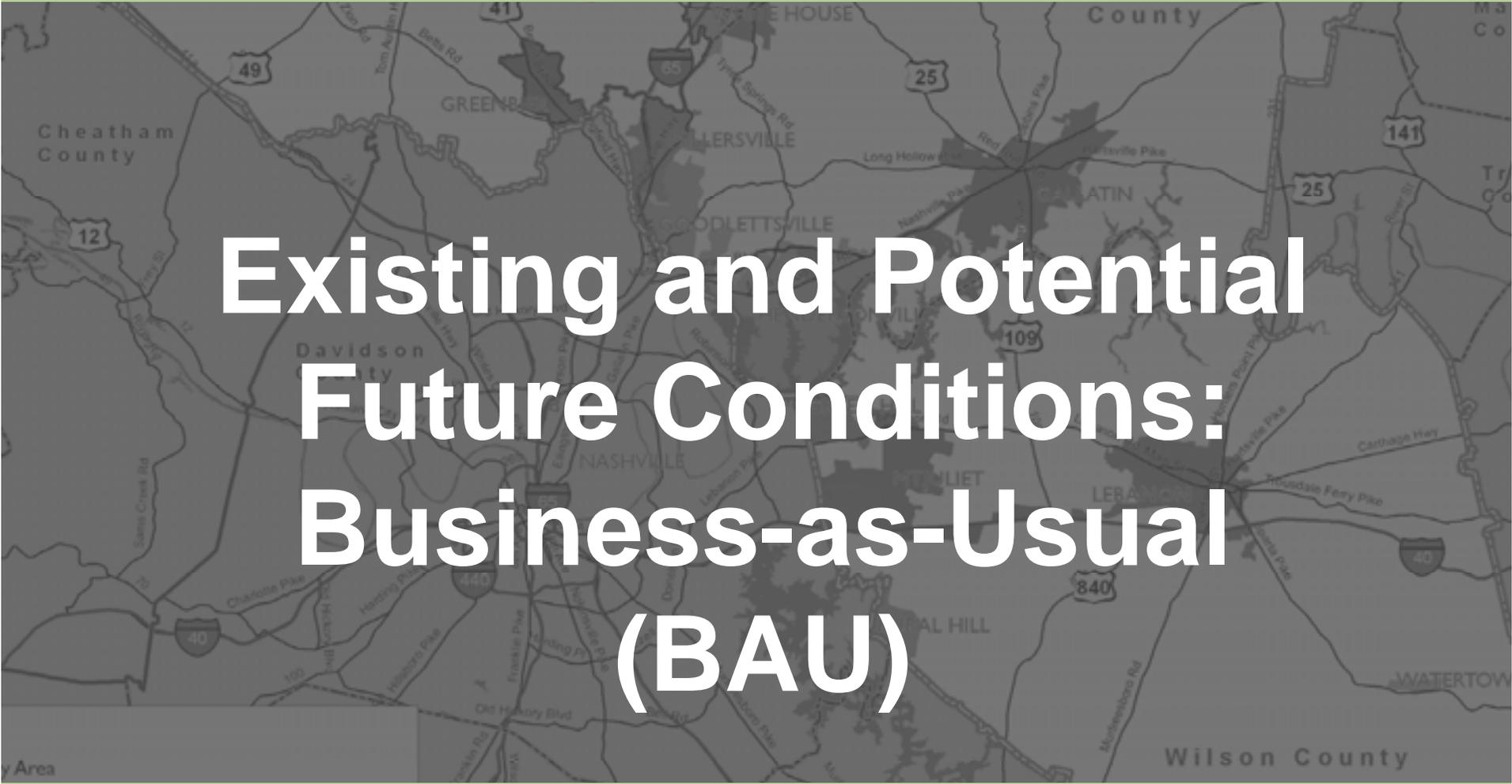


Objectives / Outcomes of Session

Round 1

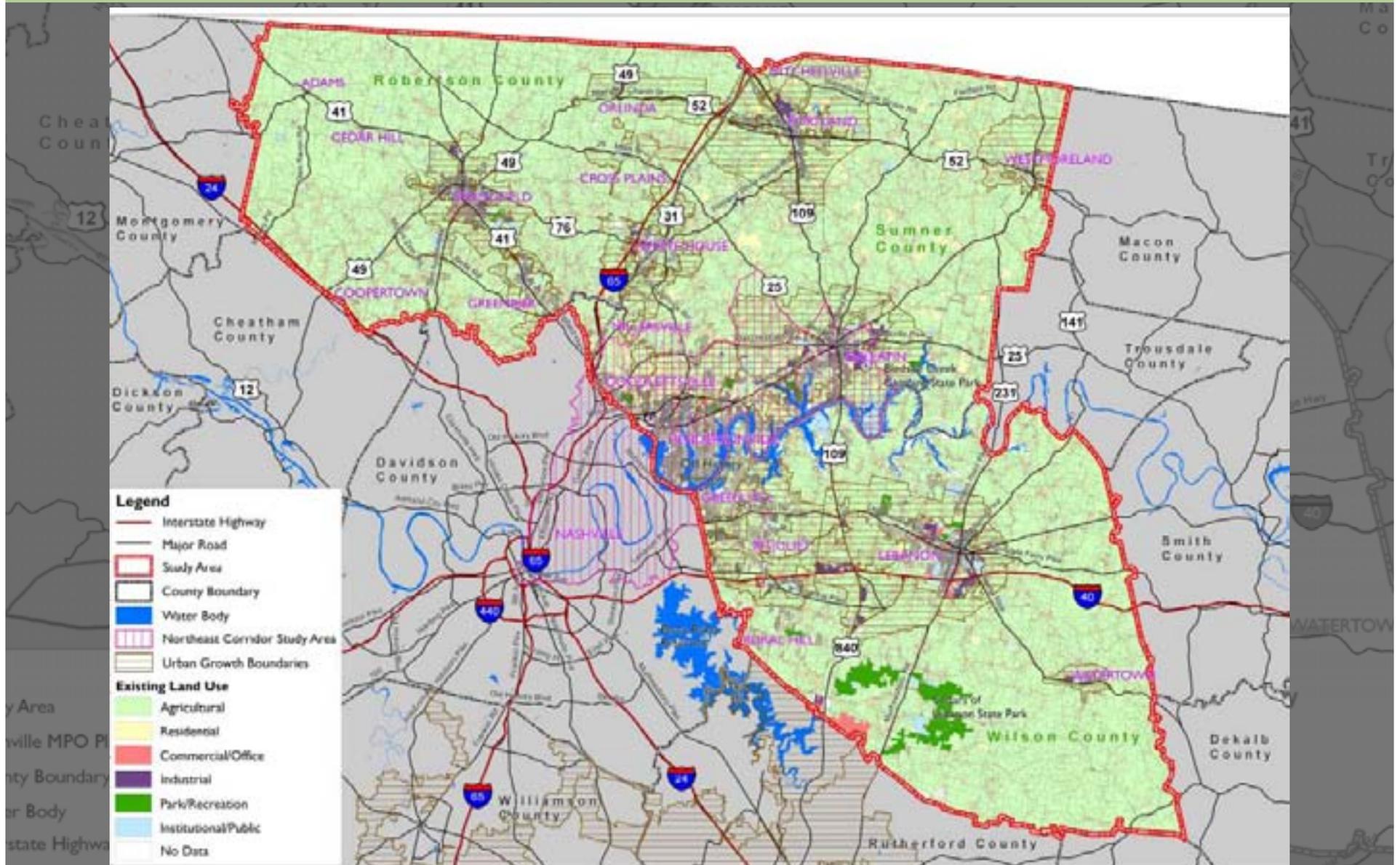
- Examine potential future of tri-county area
- Identify issues with anticipated growth
- Consider goals for the future of the study area
- Determine obstacles to achieving goals





Existing and Potential Future Conditions: Business-as-Usual (BAU)

Existing Land Use



Economic & Market Analysis

Preliminary Findings

- Regional Context & Asset Overview
- Economic & Demographic Profile
- Office Market
- Industrial Market
- Retail Market
- Residential Market
- Future Demand Analysis



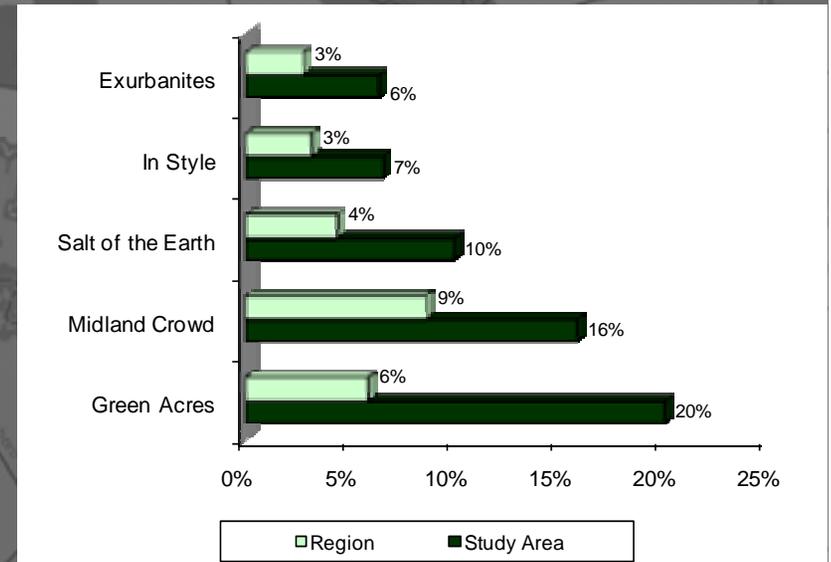
Regional Overview

- Key Findings - Nashville Region Strengths
 - **Low Cost of Living**
 - **High Quality of Life**
 - **Supportive Business Climate**
 - **High Quality Labor Force**
- Top Industries and Economic Drivers
 - Nationally prominent in **Healthcare, Logistics** and **Music**
 - **Manufacturing** employment strong relative to other benchmark regions
 - Healthcare Services Industry Capital
 - #2 ranked logistics Metro areas in nation
 - \$4 Billion economic impact of music industry in region

Economic and Demographic Profile

- Tri-County study area
 - **22% of regional population**
 - Median household income 14% less
 - More family households
 - **Nearly half of households in Sumner County**
- Top Tapestry Segments
 - Married couples
 - Suburban and rural living
 - Home and garden improvement
 - Outdoor recreation

	Tri-County Study Area	Nashville MSA	Study Area as % of MSA
Population	329,390	1,508,520	21.8%
Households	127,540	604,550	21.1%
Median Household Income	\$82,822	\$96,268	86.0%
Average Household Size	2.57	2.43	105.8%



Industry and Labor

- Tri-County Labor Force

- **Predominately employed in Services (40%) followed by Manufacturing and Retail Trade (13% each)**

- 21% of regional labor force

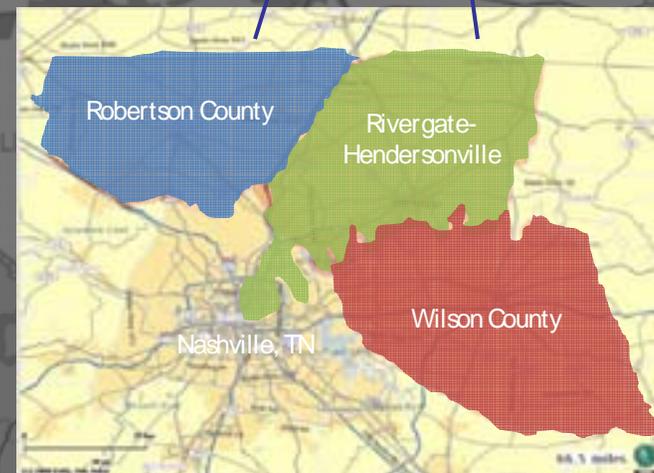
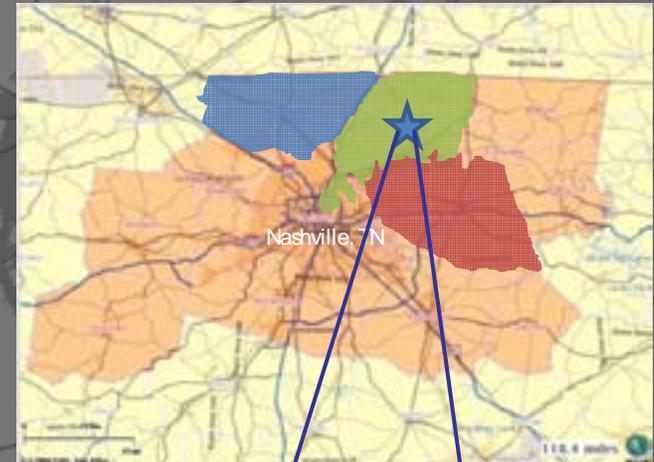
- Tri-County At-Place Employment

- Dominated by Services (27%) followed by Manufacturing (16%)

- **Employment concentrated in Sumner (41%) and Wilson (38%)**

- 14% of regional employment

- **Tri-County employment projected to grow faster than region – 2008-2030**



Office Market Overview



- **Tri-County Study Area**

- **7% of regional office inventory**
- **Concentrated in Rivergate / Hendersonville submarket**
- Brisk development activity in region with 5% under construction in study area
- Growing populations in study area provide opportunities for quality office development
- Lack of existing office nodes in study area possible constraint
- Opportunities for mixed use office development

Charlotte MPO Planning Boundary (Portion Shown)

County Boundary

Water Body

State Highway

Williamson County

Wilson County

Rutherford County

Industrial Market Overview



■ Tri-County Study Area

- **30% of regional industrial inventory**
- Concentrated in North Industrial submarket (67% of study area)
- Robust activity under construction - 3 M SF under construction (region)
- Emergence of Wilson County as industrial hub
- Regionally strong warehouse sector
- Focus recruitment on national headquarters and regional offices of large distribution operators to fill new space



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Wilson County

Retail Market Overview

- **Tri-County Study Area**

- **15% of regional retail inventory**
- **Concentrated in Hendersonville-Gallatin and Mt Juliet-Lebanon area**
- Strong development activity in region
- Attraction of major employers stimulates retail spin-off demand in region
- Low vacancy rates and strong developer interest in Tri-County Study Area indicates solid demand for new space
- Retain high quality of life with amenity-rich mixed-use retail, housing, and employment centers



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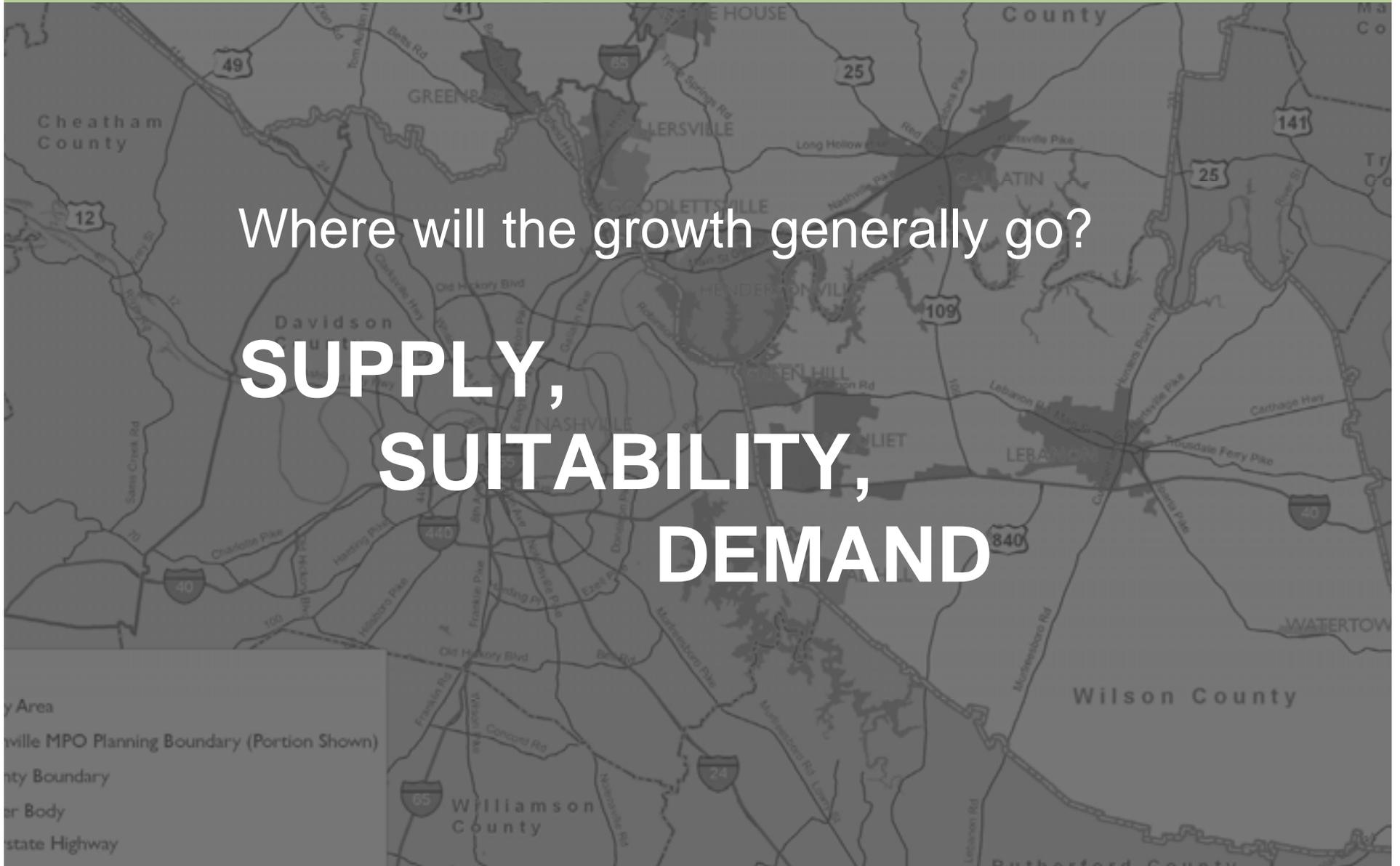
Residential Market



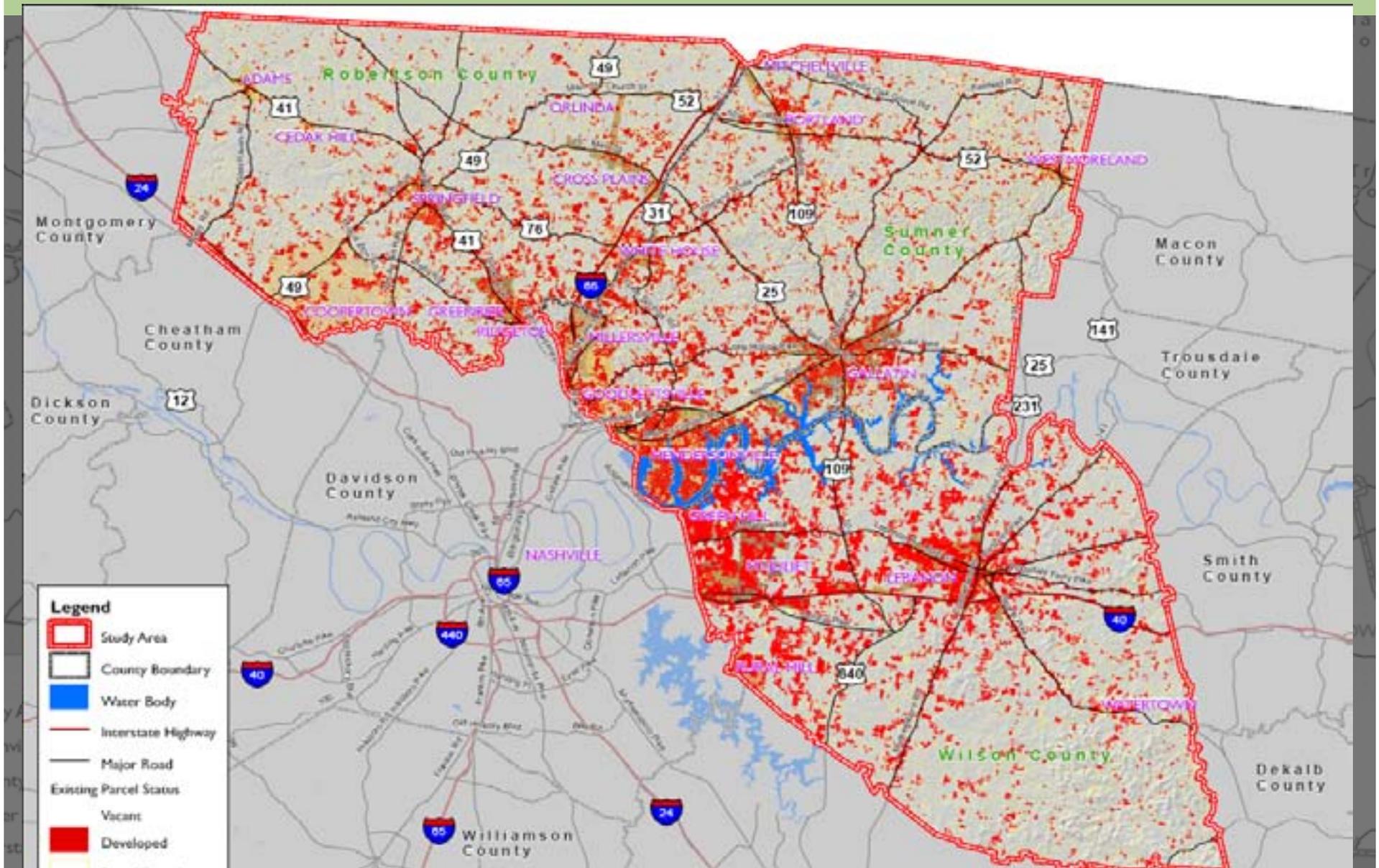
- **Tri-County Study Area**
 - Desirable residential communities in Tri-County study area
 - **20% of regional housing stock**
 - Primarily single-family homes (78%)
 - Pricing on par with region
 - 25% of regional residential development under construction in study area
 - **Half of study area activity in Sumner County**
 - Need to ensure adequate infrastructure in selected high growth areas
 - Range of home values provides variety of housing options
 - Substantial retail and mixed use offerings provides amenities to attract residents

Where will the growth generally go?

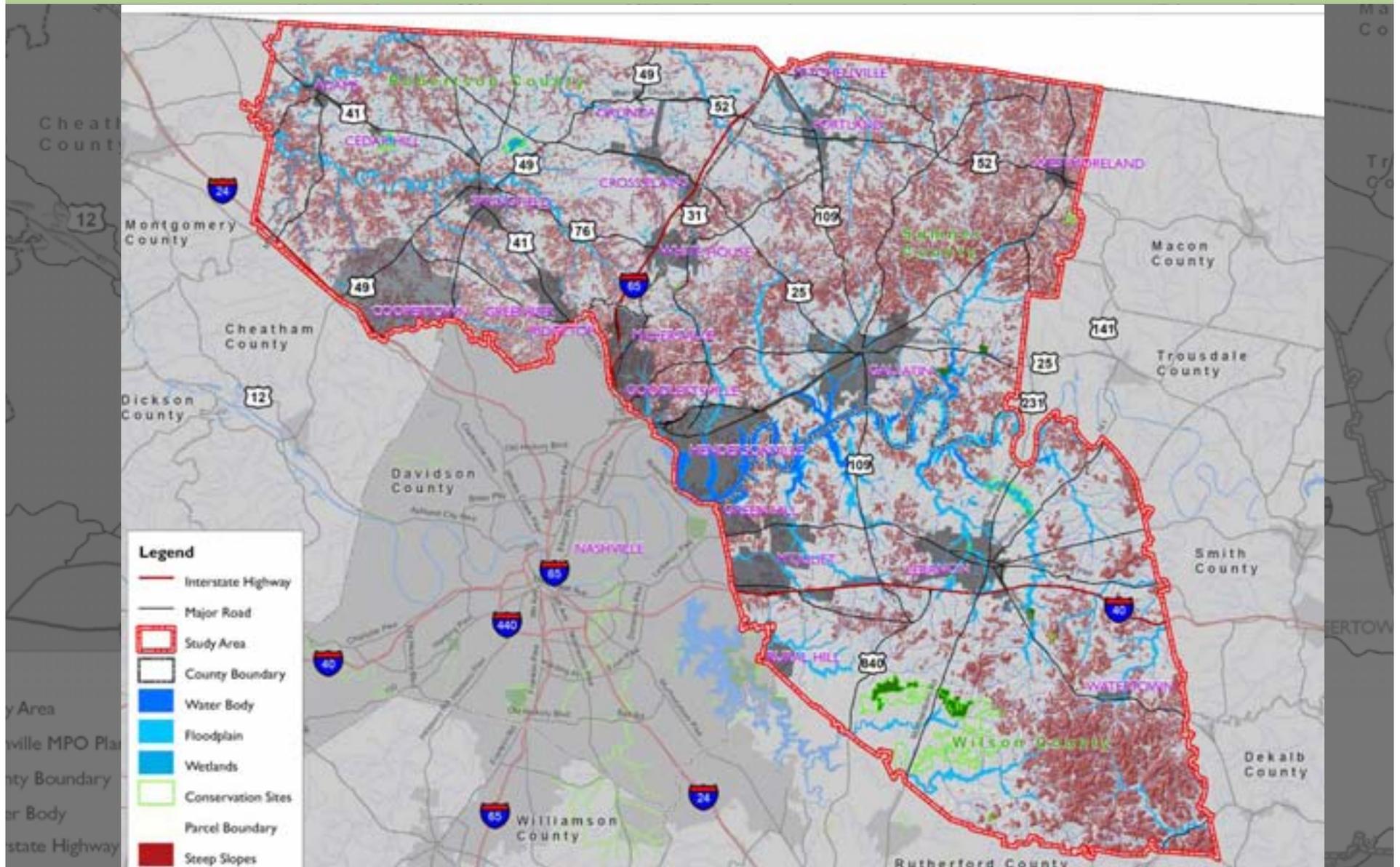
**SUPPLY,
SUITABILITY,
DEMAND**



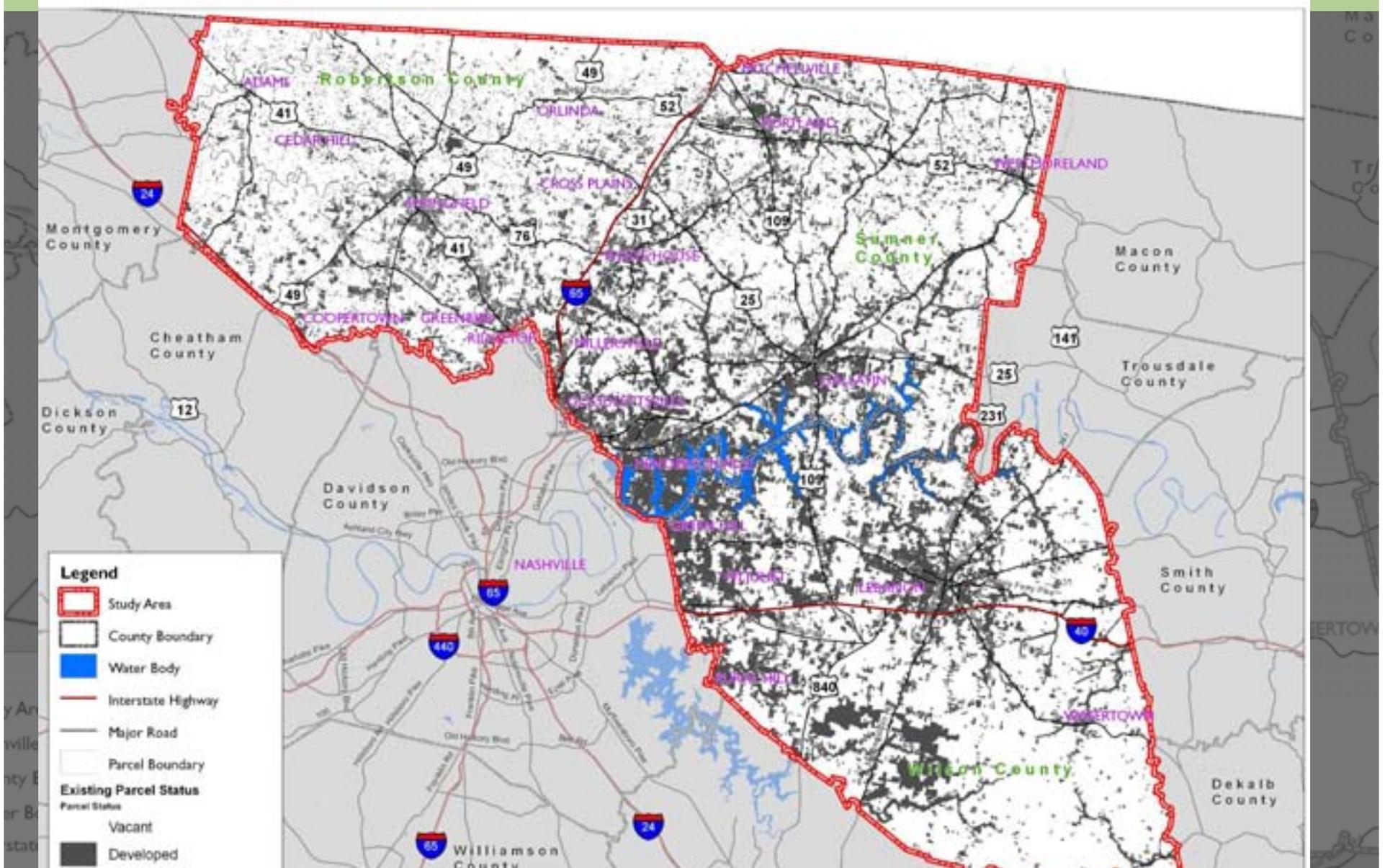
Supply - Existing Development



Supply – Environmental Constraints (Environment, Parks, and Open Space)

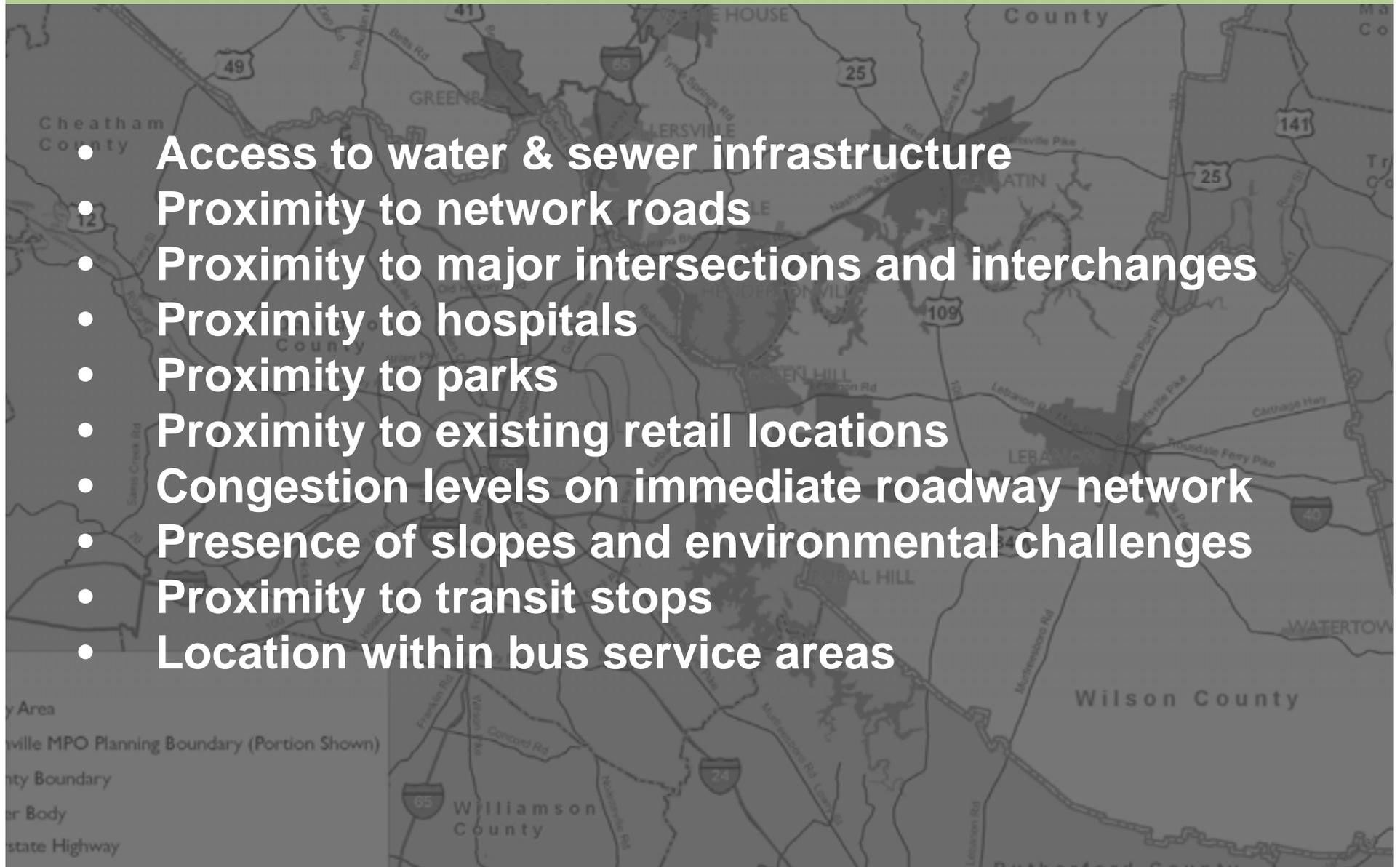


Supply – Net Available Land

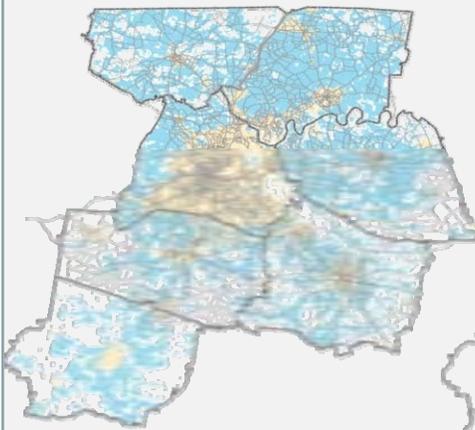


Suitability Factors

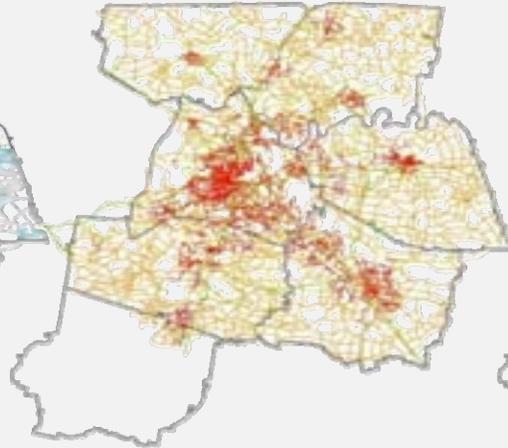
- Access to water & sewer infrastructure
- Proximity to network roads
- Proximity to major intersections and interchanges
- Proximity to hospitals
- Proximity to parks
- Proximity to existing retail locations
- Congestion levels on immediate roadway network
- Presence of slopes and environmental challenges
- Proximity to transit stops
- Location within bus service areas



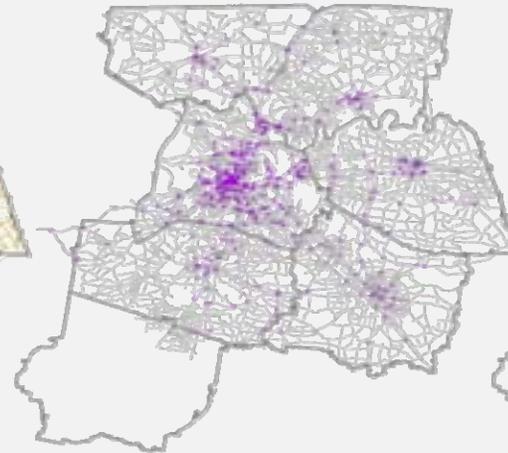
Suitability Factors Illustrated



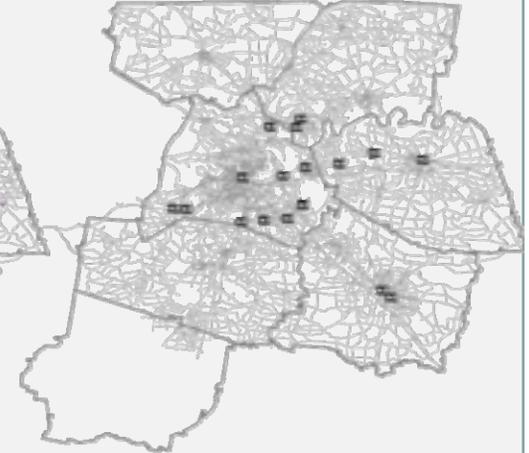
Water and Sewer Service Areas



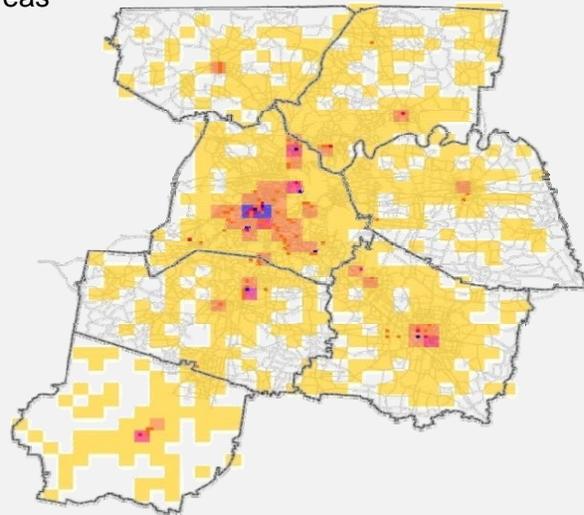
Network Road Speeds



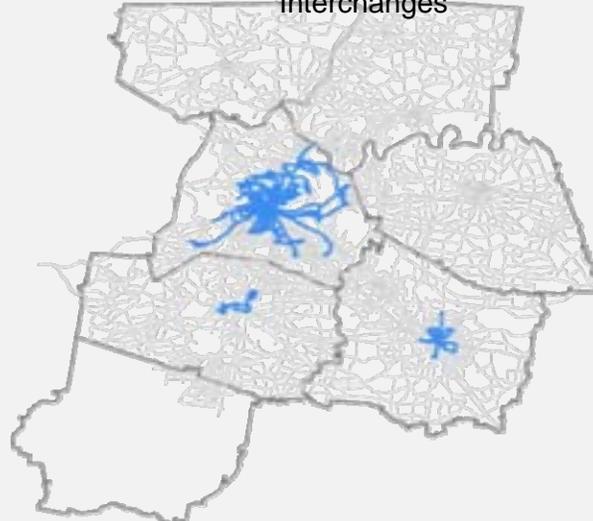
Major Intersections & Interchanges



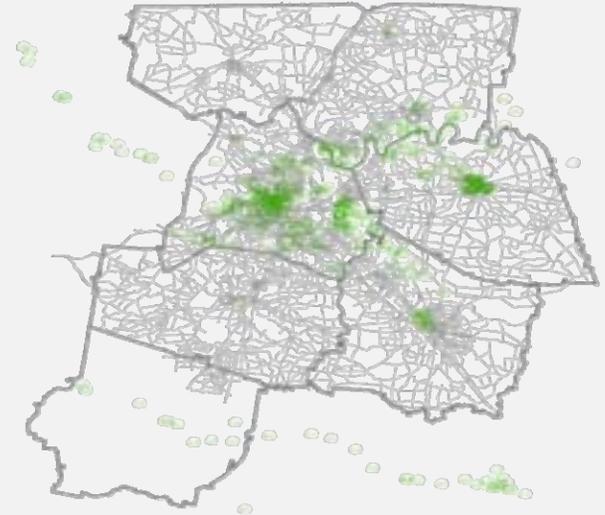
Transit Stations



Retail Density Grids

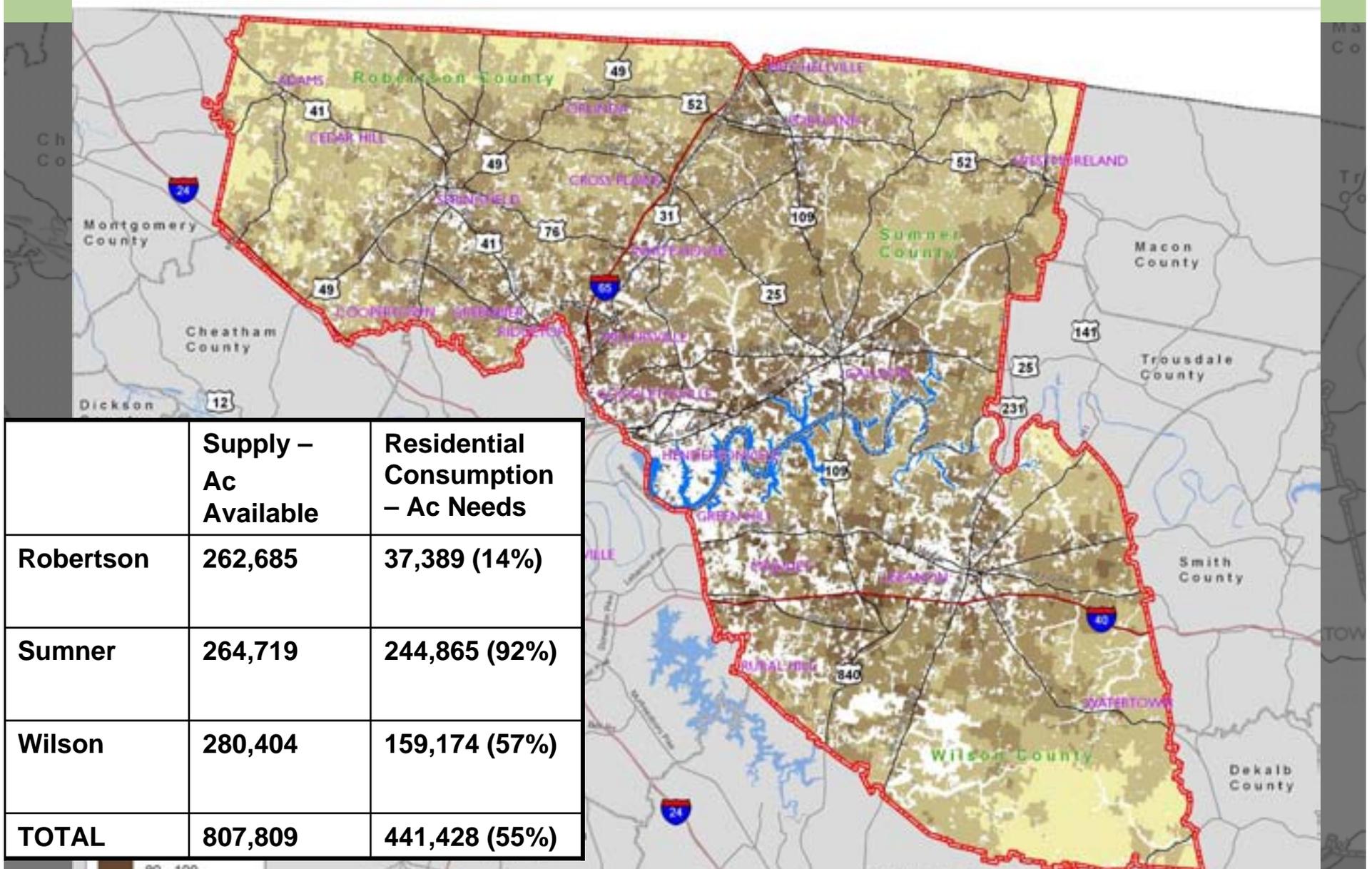


Bus Routes



Parks and Recreation Areas

TriCounty Suitability Map – Net Available



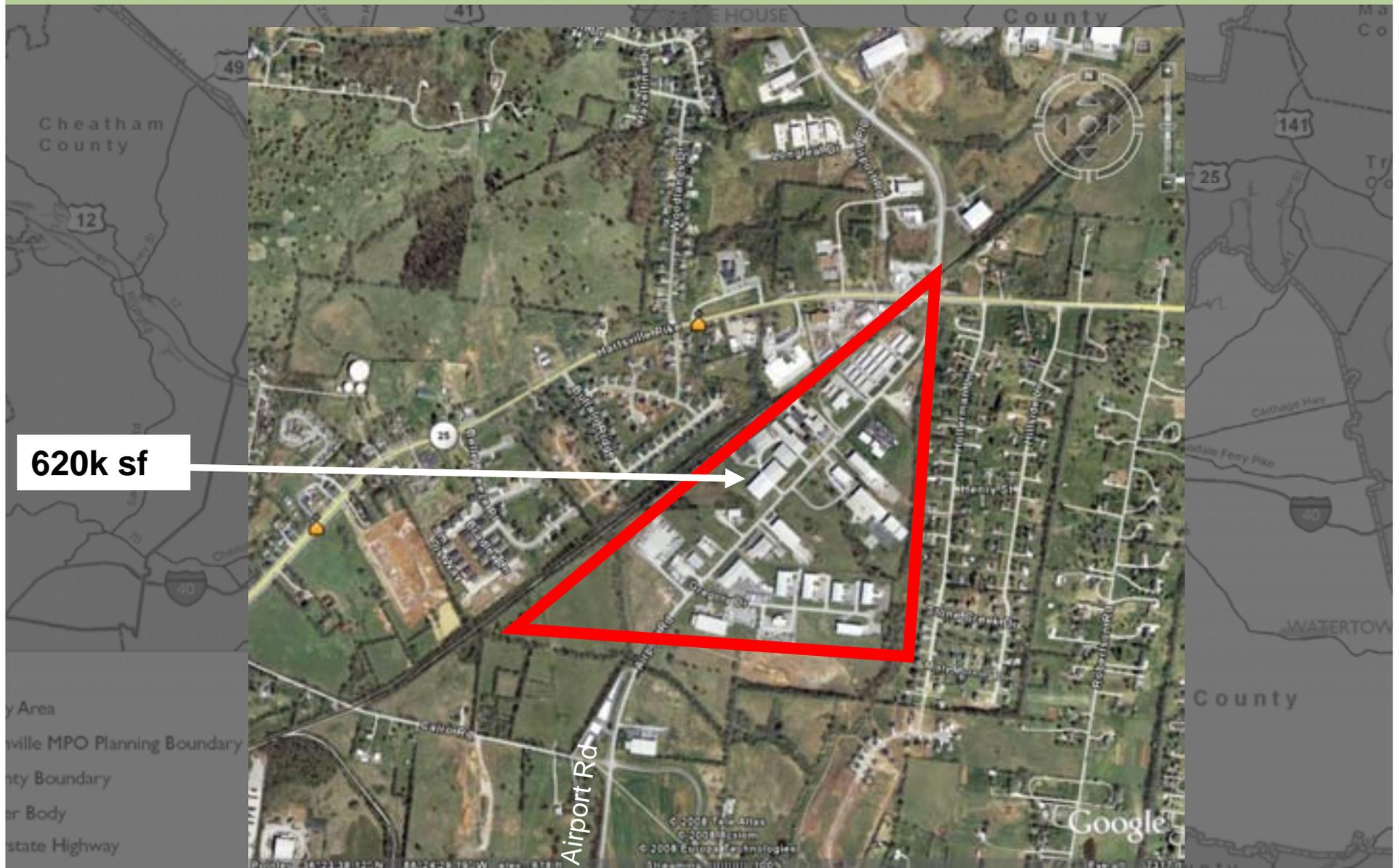
Future Demand Analysis

- **Tri-County Study Area**

- Function of job and household growth
- Projected from 2008 to 2035
- Steady growth in all sectors projected
- Future job growth most prominent in industrial sector

	Job/HH Growth (2008-2035)	Total Demand (2008-2035)	Annual Demand (2008-2035)
TRI-COUNTY STUDY AREA			
Office	17,219	4.3 M SF	160 K SF
Industrial	32,290	11.3 M SF	418 K SF
Retail	17,071	5.7 M SF	210 K SF
Residential	83,320	170 M SF	6.3 M SF
NASHVILLE REGION			
Office	141,455	35 M SF	1.3 M SF
Industrial	168,959	59 M SF	2.2 M SF
Retail	86,744	29 M SF	1 M SF
Residential	311,420	636 M SF	23.5 M SF

Future Demand Analysis – Industrial



Future Demand Analysis – Retail

Indian Lake -

850,000 sf retail

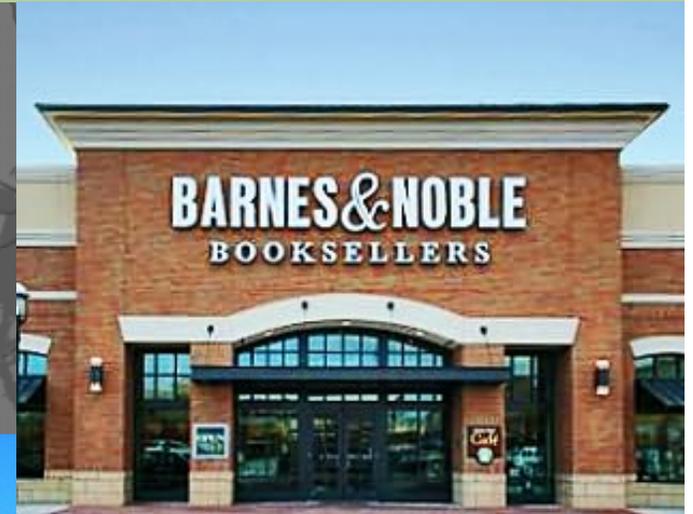
3,000,000 office

16 screen movie theatre

1,000 du residential

Rivergate Mall -

1,129,035 sf retail



Demand - Retail Employment Growth Forecast

County	2008	2020	2035	% Annual
Robertson	4,430	5,730	7,265	1.85%
Sumner	8,910	10,990	13,672	1.60%
Wilson	10,350	27,780	19,825	2.44%
Total	23,690	31,310	40,761	2.03%

Source: Woods & Poole and BBPC Report, 2008

Demand - Office Employment Growth Forecast

County	2008	2020	2035	% Annual Growth
Robertson	4,030	5,320	6,779	1.94%
Sumner	10,280	13,030	16,625	1.80%
Wilson	9,250	13,020	17,375	2.36%
Total	23,560	31,370	40,779	2.05%

Source: Woods & Poole and BBPC Report, 2008

Demand - Industrial Employment Growth Forecast

County	2008	2020	2035	% Annual Growth
Robertson	13,540	16,430	19,885	1.43%
Sumner	21,680	27,100	34,088	1.69%
Wilson	21,630	27,780	35,167	1.82%
Total	56,850	71,310	89,140	1.68%

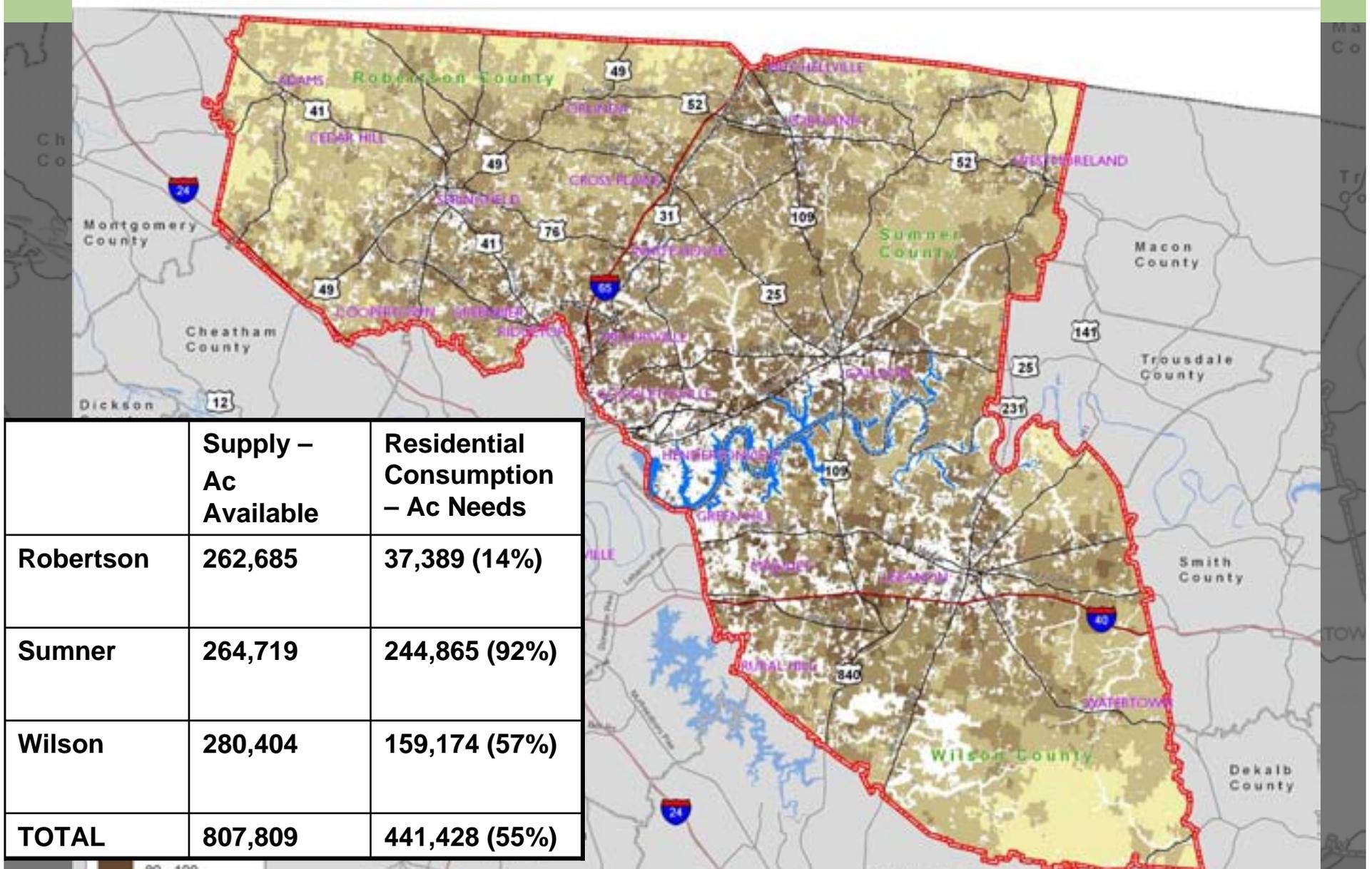
Source: Woods & Poole and BBPC Report, 2008

Demand - Household Growth Forecast

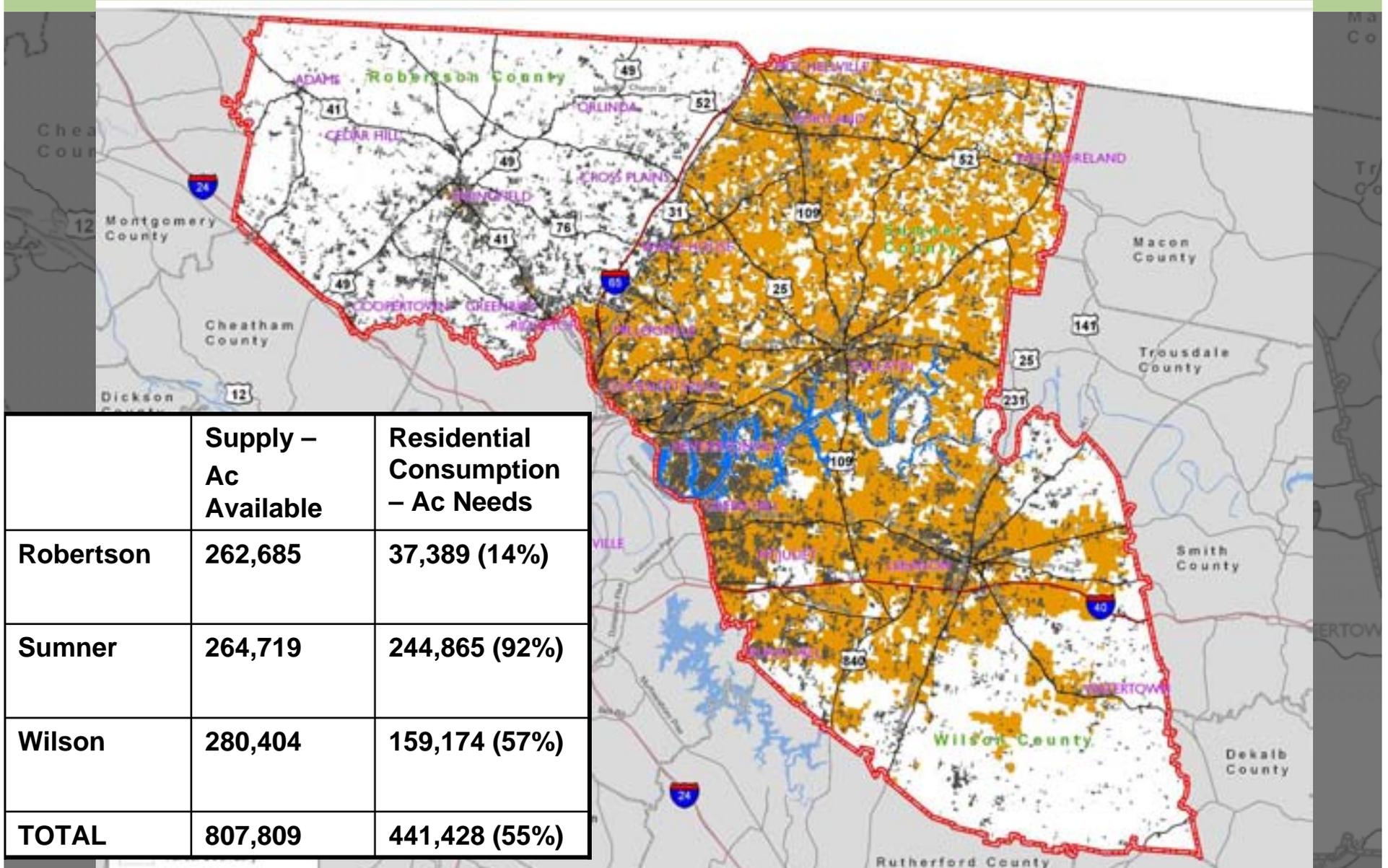
County	2008	2020	2035	% Annual Growth
Robertson	24,510	30,780	38,231	1.66%
Sumner	60,860	77,680	98,194	1.79%
Wilson	42,170	56,670	74,435	2.13%
Total	127,540	165,130	210,860	1.88%

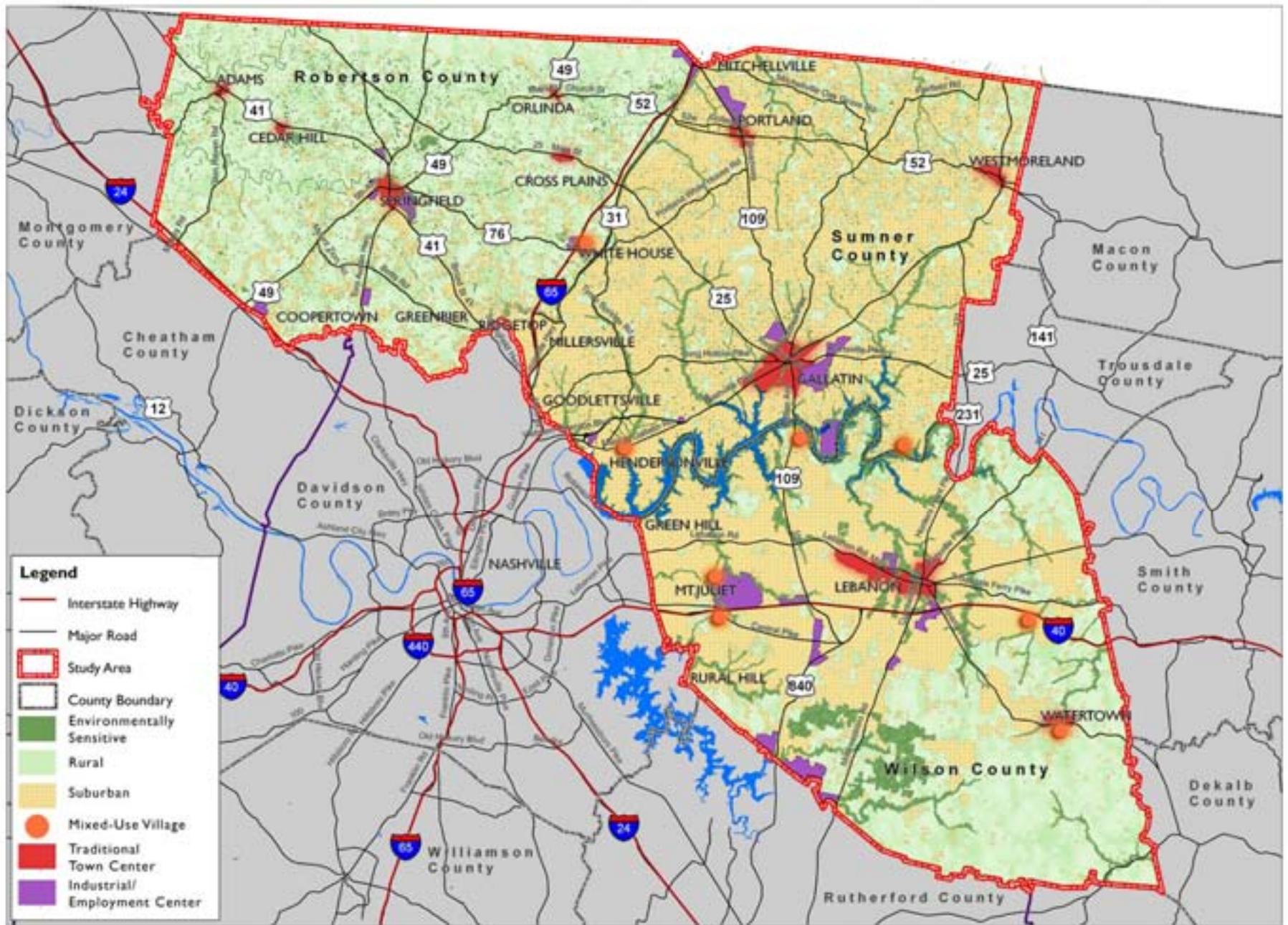
Source: Woods & Poole and BBPC Report, 2008

TriCounty Suitability Map – Net Available



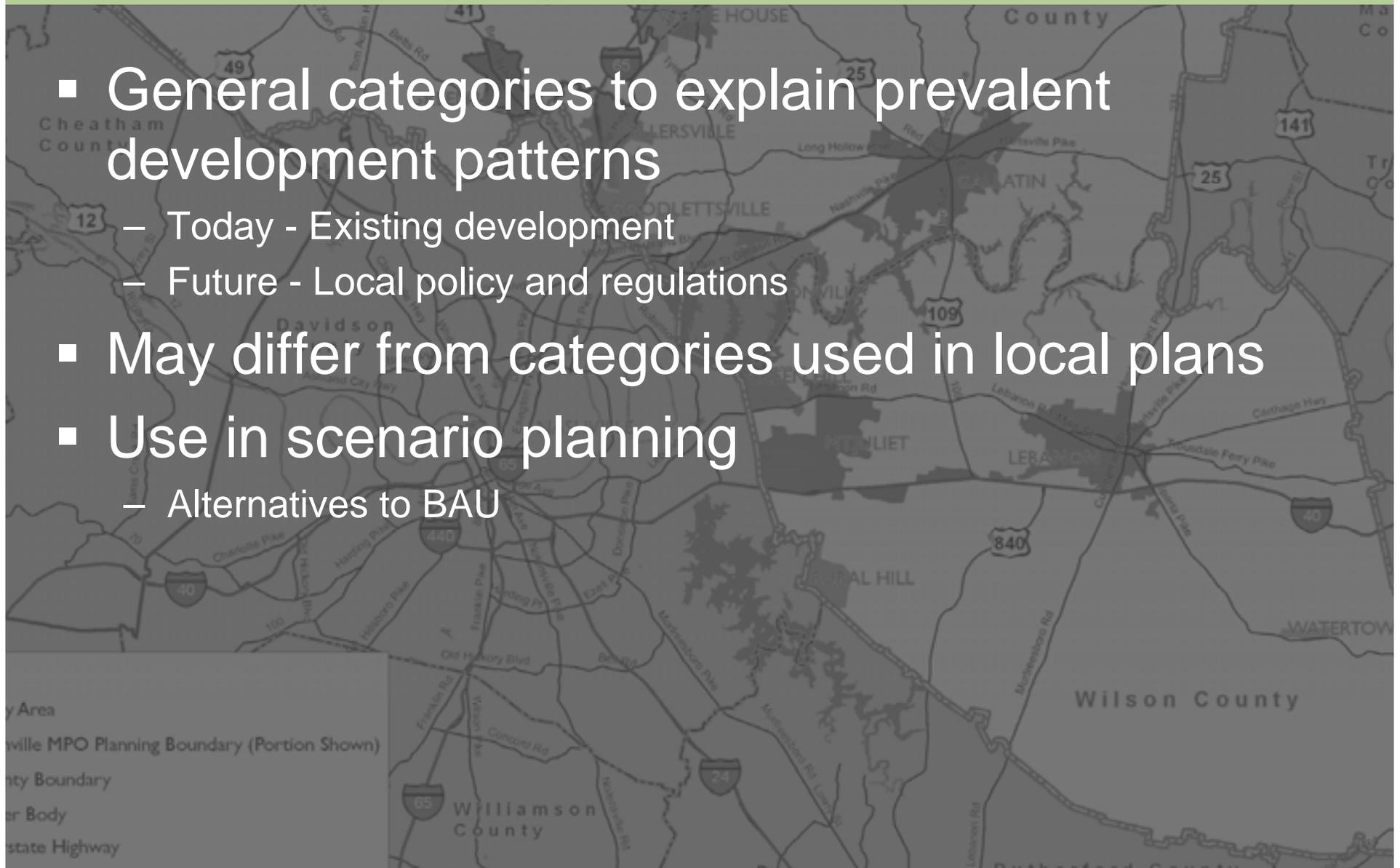
Residential Allocation





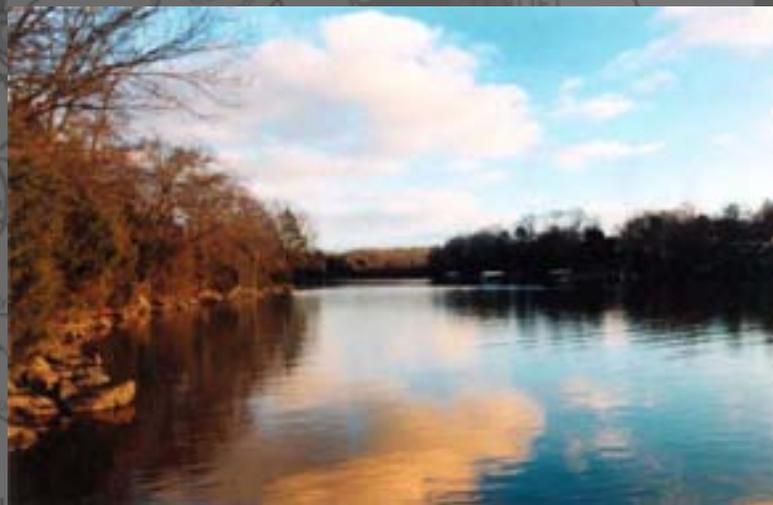
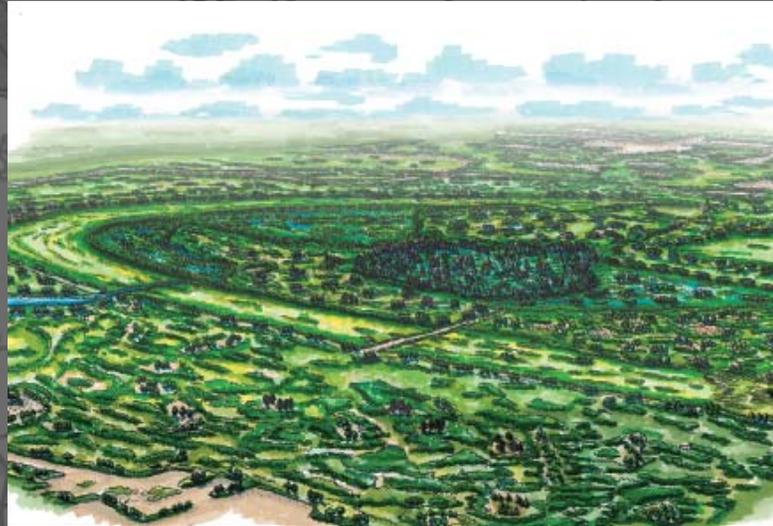
Character Types

- General categories to explain prevalent development patterns
 - Today - Existing development
 - Future - Local policy and regulations
- May differ from categories used in local plans
- Use in scenario planning
 - Alternatives to BAU



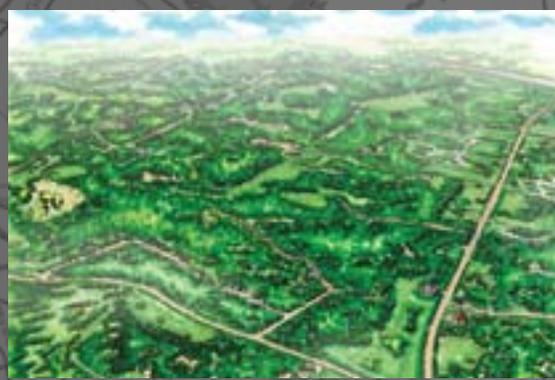
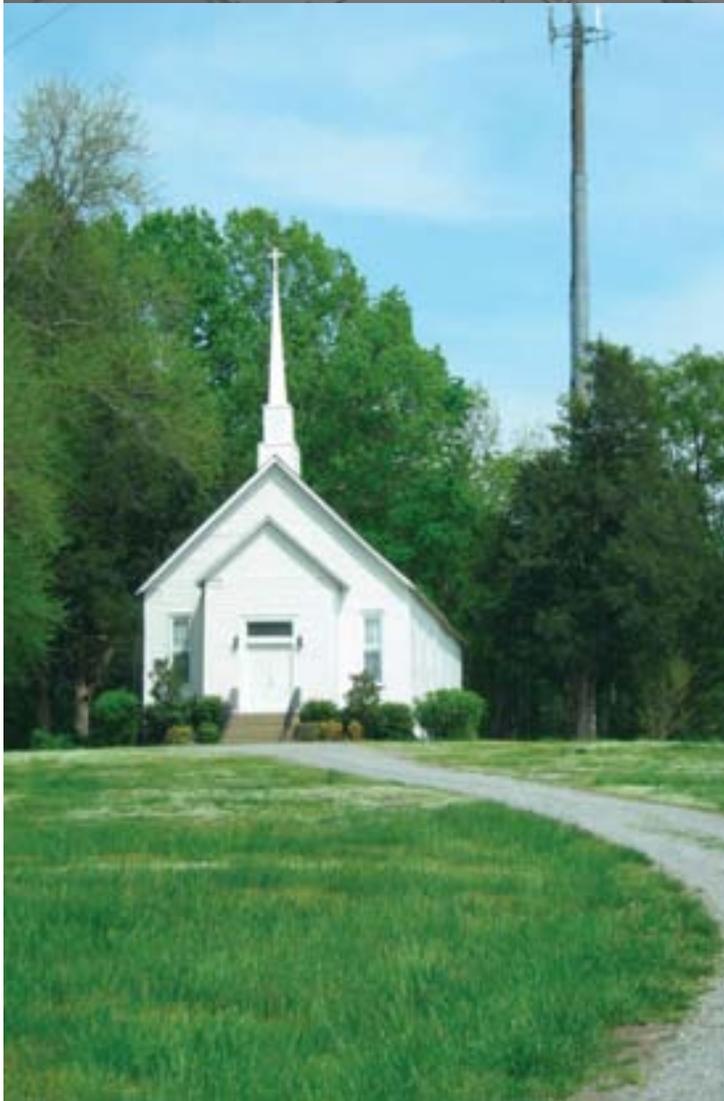
Character Types – Environmentally Sensitive

- Areas recognized for preservation of environmentally sensitive areas
- Includes state parks & large dedicated open spaces



Wilson County

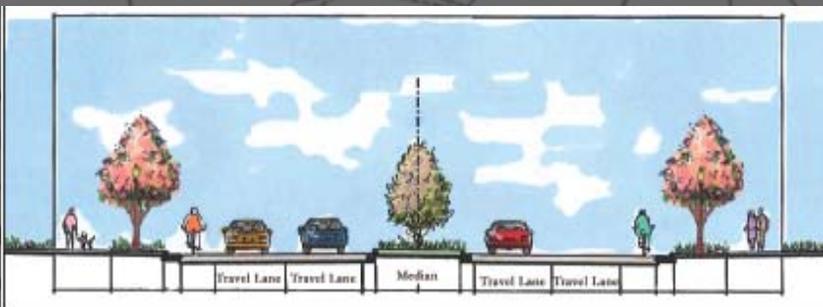
Character Types - Rural



- Areas recognized as those having significant value for continued agricultural purpose and rural way of life in the future

Character Types - Suburban

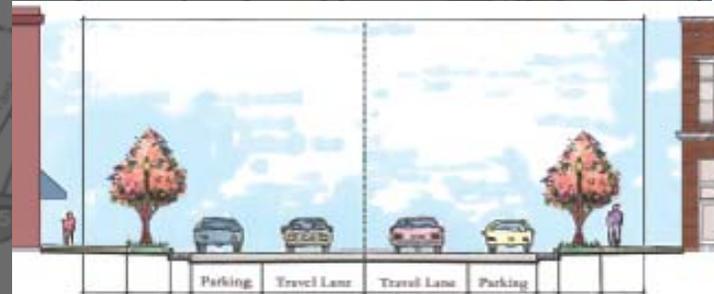
- Areas where a variety of land uses occur at low densities, generally separated across the landscape by specific use type
- Automobile-oriented, includes highway commercial areas found along major roadway corridors



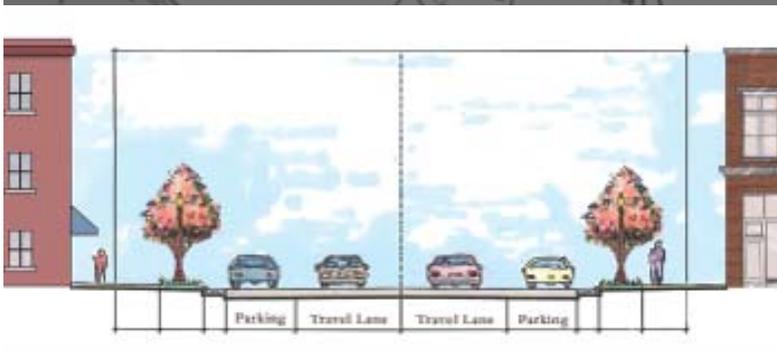
Character Types – Mixed-use Villages



- Mixed-use area having a variety of land uses at higher densities in a compact, well-connected pattern within the landscape
- May include new office employment center



Character Types – Traditional Town Center

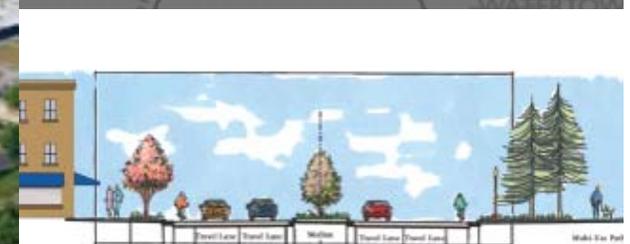


- Areas with a variety of land uses, typically at the highest densities in region
- Generally found in historic established core areas
- Pedestrian oriented, due to these areas being planned prior to euclidean zoning (separates land uses) and automobile dominance in the landscape (typically pre-1940s)



Character Types – Industrial Employment Center

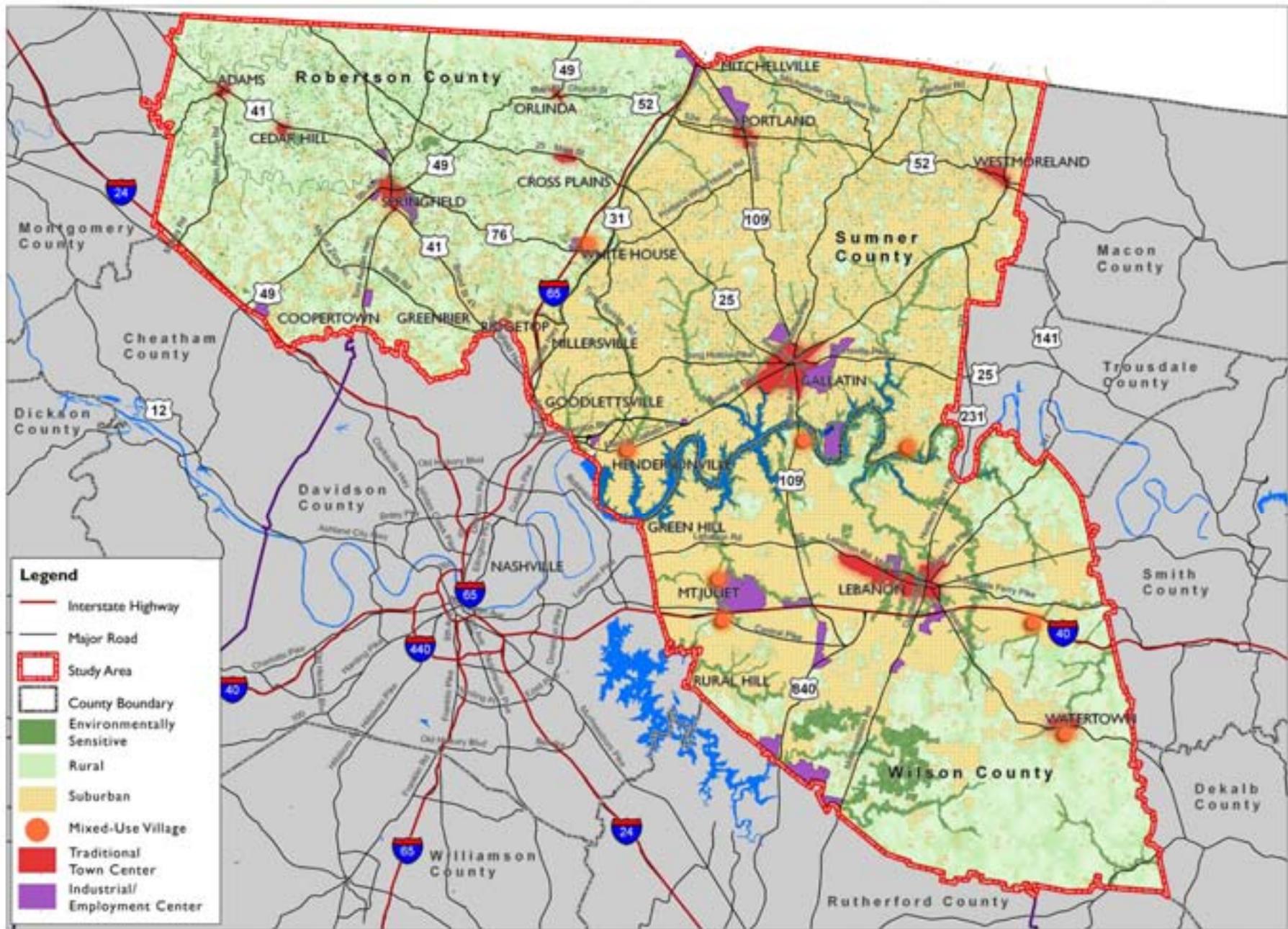
- Areas designed for major employment uses serving a specific or unique purpose such as an industrial park
- Generally separated across the landscape from other uses



Character Type – Proposed New



- Transit-Oriented Development
- District supporting a mix of land uses, at higher densities, located in close proximity to an existing or planned mass transit station



Issues



Overview of Issues

Lack of context-sensitive roadway design
Auto-oriented development

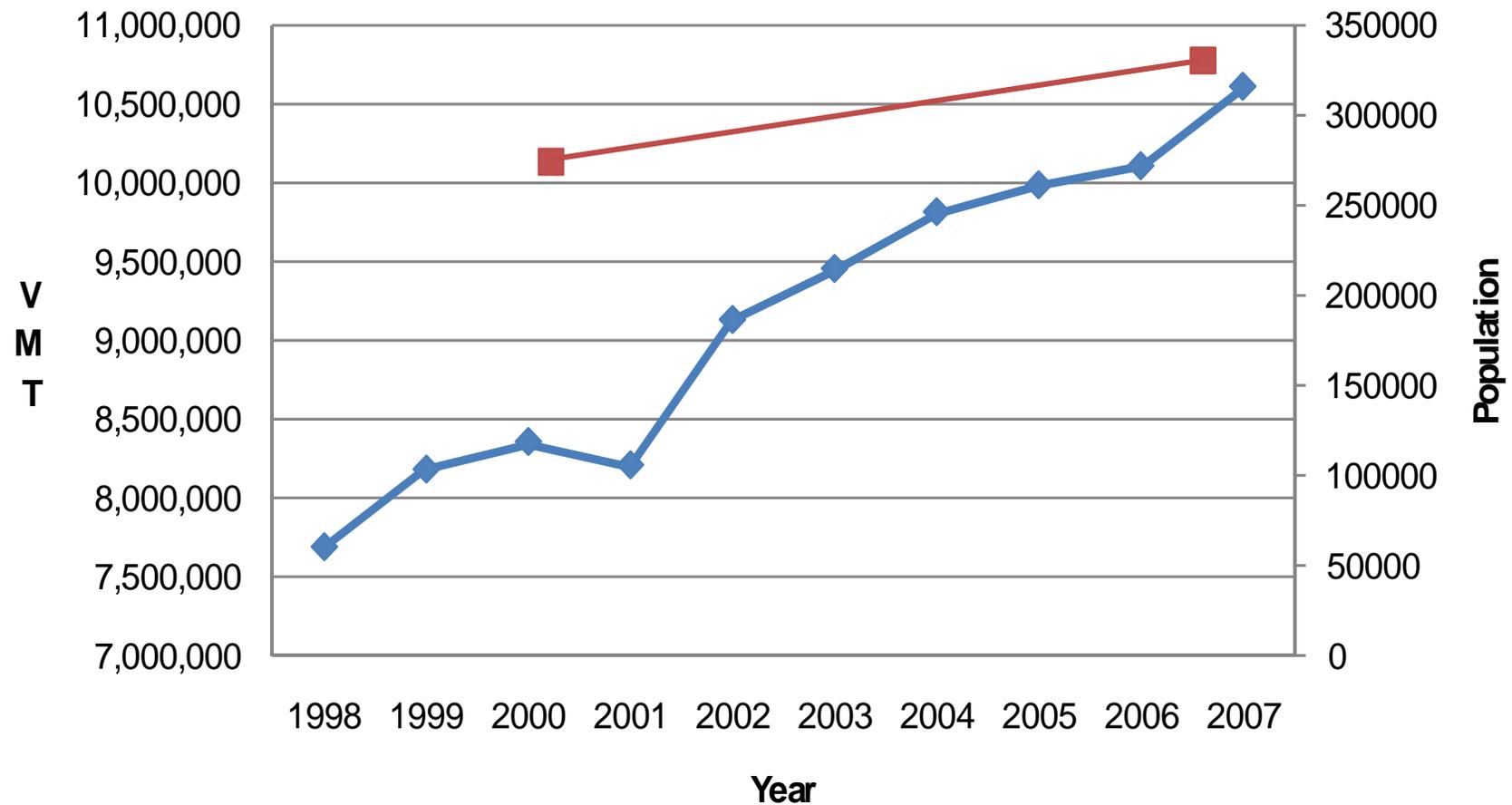


Overview of Issues



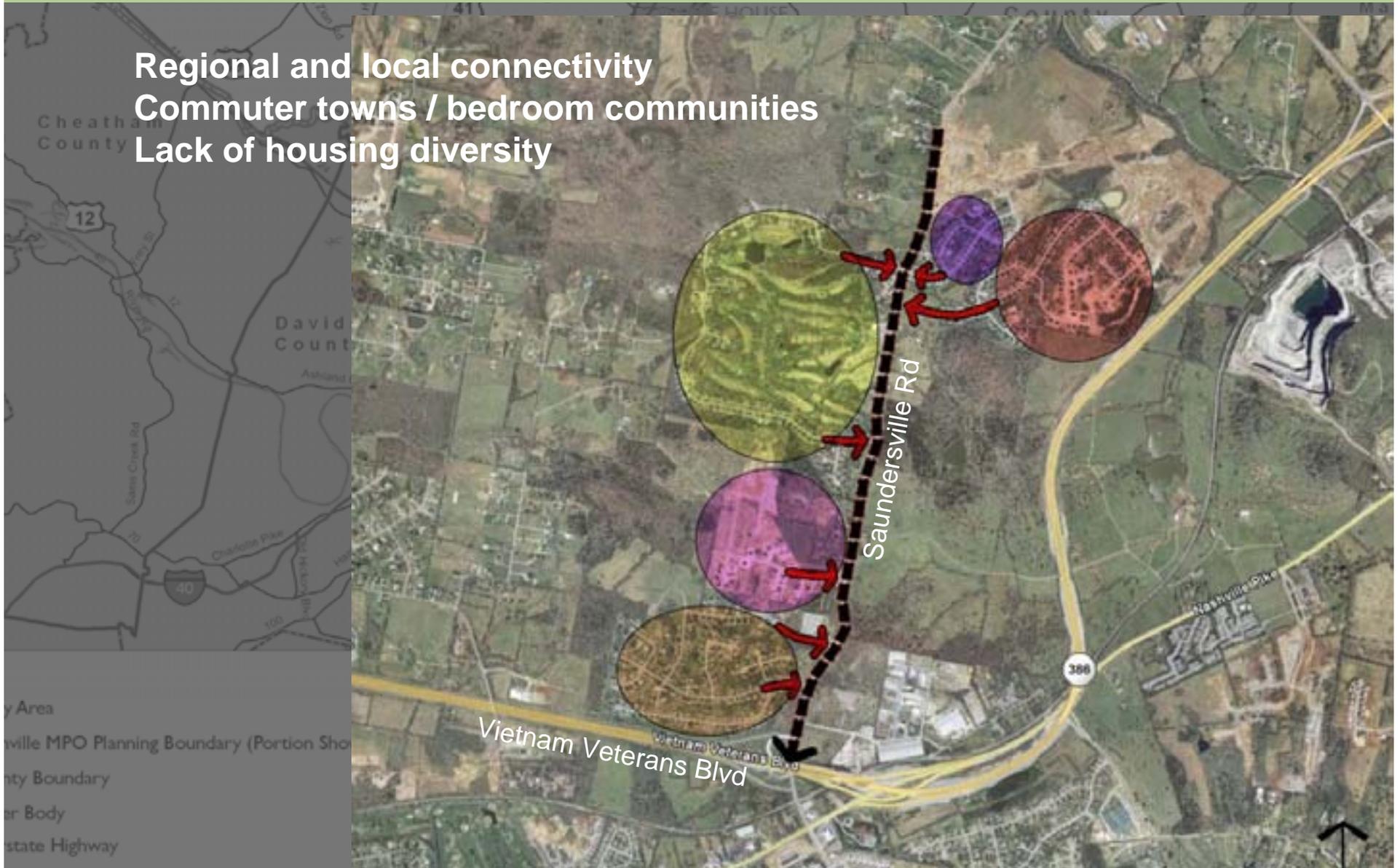
Overview of Issues

Tri-County Annual VMT Trend



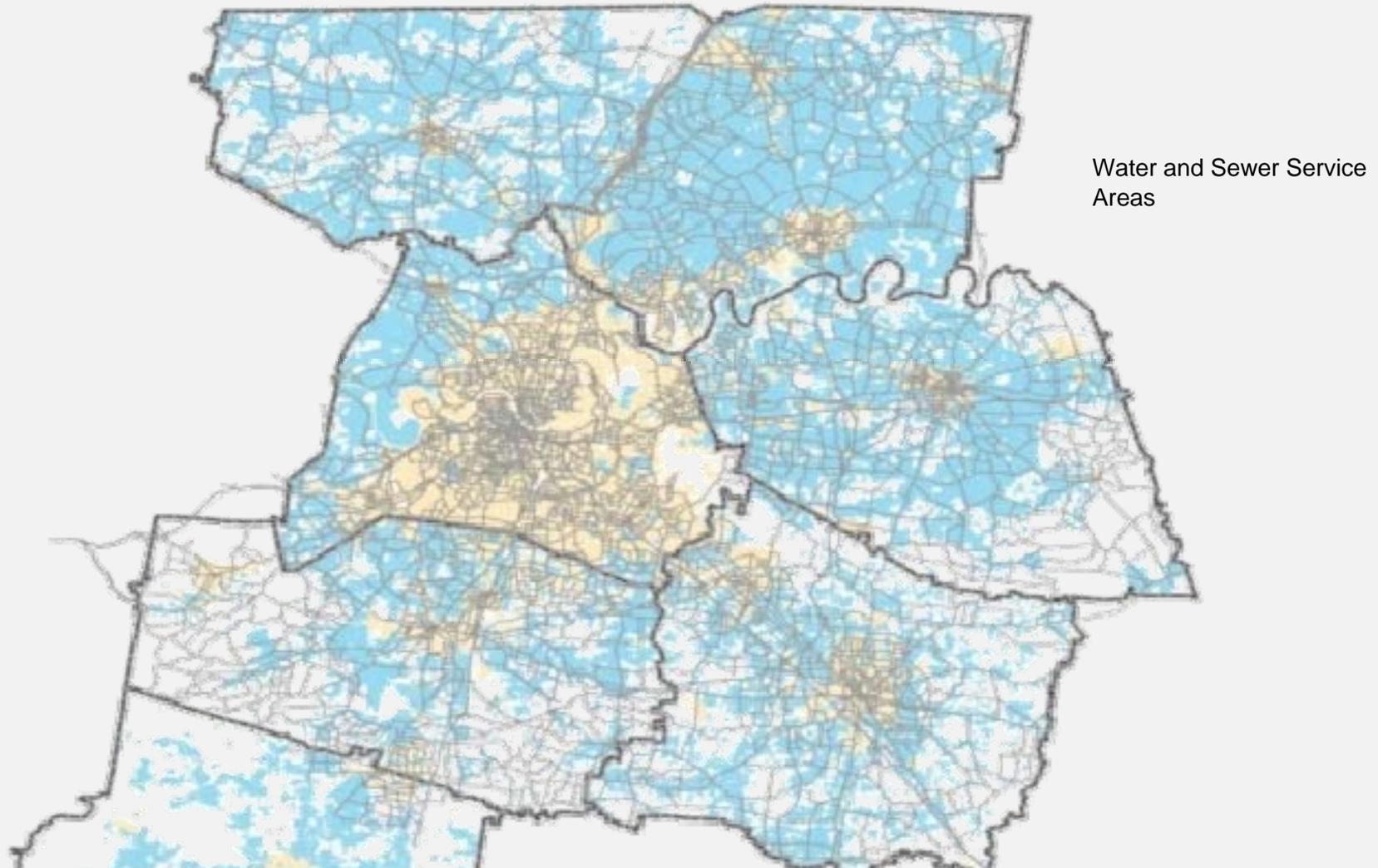
Overview of Issues

Regional and local connectivity
Commuter towns / bedroom communities
Lack of housing diversity



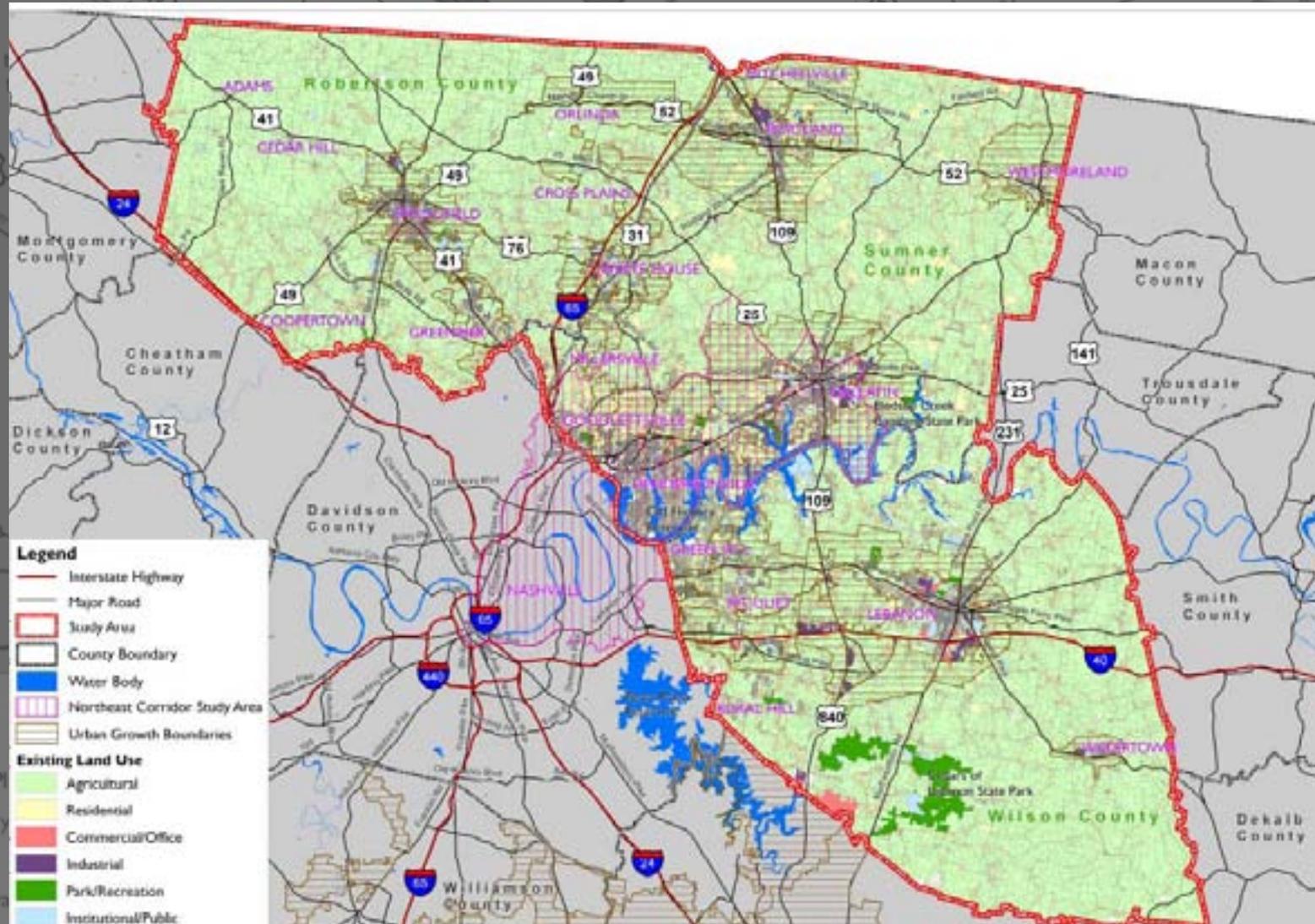
Overview of Issues

Public infrastructure – policies and availability



Overview of Issues

Open space preservation



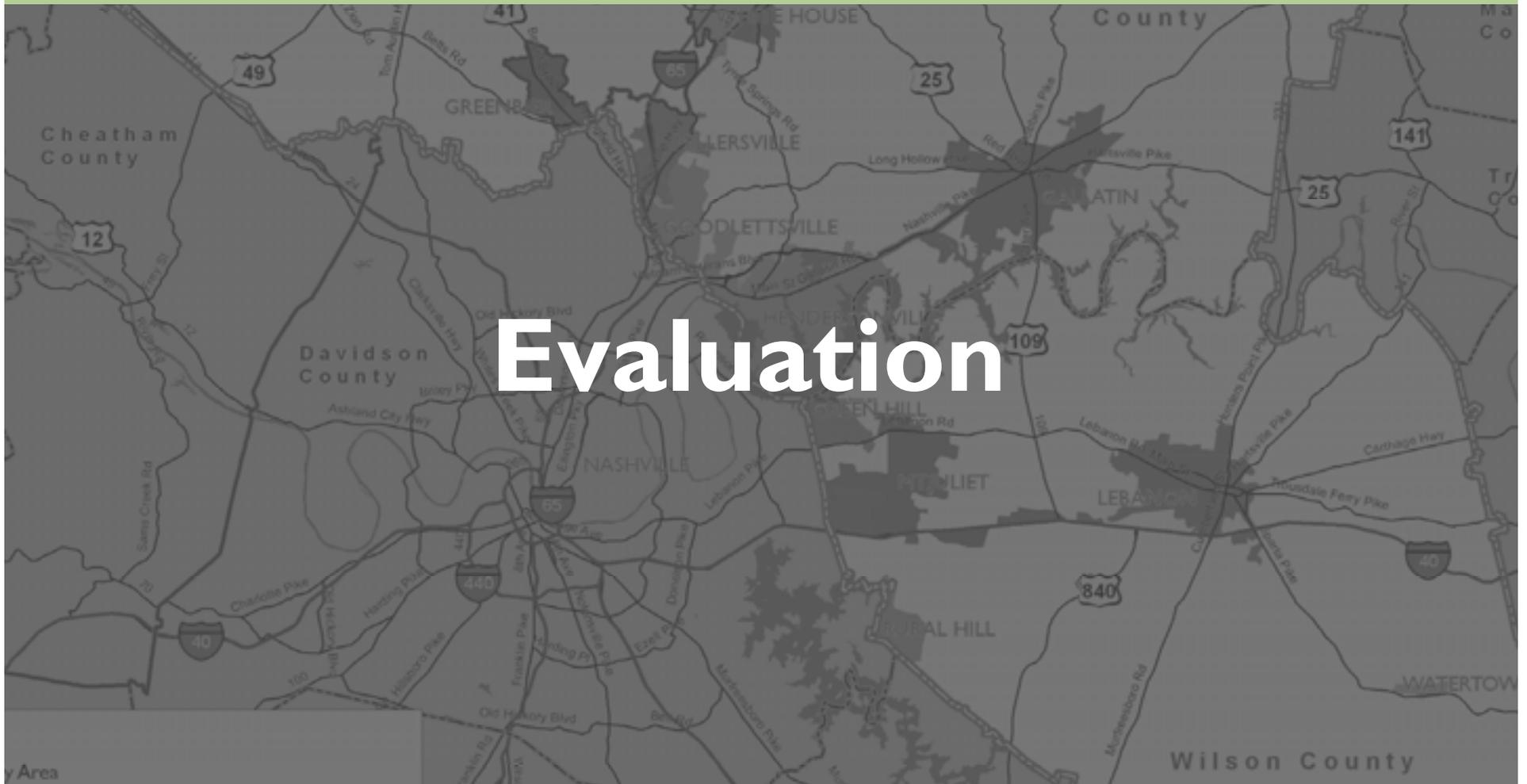
Common Goals



Overview of Common Local Goals

- **Historic Conservation and Enhancement**
- **Viable Agriculture**
- **Rural Preservation**
- **Economic Enrichment while Safeguarding Existing Public and Private Development**
- **Preserve Urban Centers**
- **Protection of Natural Resources**
- **Efficient Transportation System**
- **Ensure Availability of Services**
- **Provide Housing Options**
- **Maintain Sense of Community and Sense of Place**

Evaluation



Group Exercise – Report Card on BAU

Goals	Grade
Historic Conservation and Enhancement	
Viable Agriculture	
Rural Preservation	
Economic Enrichment while Safeguarding Existing Public and Private Development	
Preserve Urban Centers	
Protection of Natural Resources	
Efficient Transportation System	
Ensure Availability of Services	
Provide Housing Options	
Maintain Sense of Community and Sense of Place	

Upcoming Session

Round 2: The Importance of Quality Growth

October 6 - Hendersonville High School @ 6 PM

October 7 – Springfield City Hall @ 5 PM

October 9 – Cumberland University @ 5:30 PM

Participants will learn about choices available for the future of the study area.

Provide input toward alternative ways to grow in the future based upon quality issues defined and choices available.