

# 2007 Downtown Nashville Business Census and Survey

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Report of Findings

November, 2007



# Scope and Purpose

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- Census: to define employee counts by location and by industry sector
- Survey: to define employee demographics and business perceptions of downtown
- Findings give prospective downtown developers and tenants needed demographic data
- Findings assist committee chairs and staff in making appropriate annual budget allocations



# DOWNTOWN BUSINESS CENSUS 2007

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- Total number of 1,402 downtown businesses, organizations, and governmental entities were identified within the defined study area
- Total number of 47,617 employees were reported for these businesses (increase from 46,867 employees in 2005 and 45,301 in 2004)
- Responses reflected each organization's position as of October 1, 2007





# Enterprises by Industry Sector

Code	NAICS Sector	Enterprises	Employees
92	Public Administration	148	12,663
51	Information, Publishing and Broadcasting	98	6,564
72	Accommodation and Food Services	186	5,806
5411	Legal Services	217	3,712
52	Finance and Insurance	111	3,002
44	Retail and Wholesale Trade	183	2,255
54	Professional, Scientific and Technical Services	74	1,698
71	Arts, Entertainment and Recreation	53	1,560
81	Other Services	117	1,282
22	Utilities	6	1,070
48	Transportation and Warehousing	24	890
32	Manufacturing	16	765
53	Real Estate, Renting and Leasing	56	622
62	Health Care and Social Assistance	37	596
23	Construction	18	539
61	Educational Services	8	298
56	Administrative and Support Services	15	140
55	Management of Companies and Enterprises	5	81
0	Unknown	0	1,089



# Top 10 Downtown Employers

2007 Rank	Largest Downtown Employers	2005 Rank	2004 Rank
1	State of Tennessee	1	1
2	Metropolitan Government of Nashville & Davidson County	2	2
3	US Federal Government	3	3
4	LifeWay Christian Resources	4	4
5	AT&T	6	5
6	Nissan North America	N/A	N/A
7	Nashville Electric Service	7	6
8	<i>The Tennessean</i>	5	7
9	U.S. Smokeless Tobacco	8	10
10	Waller Lansden Dortch & Davis	N/A	N/A



# SURVEY RESULTS

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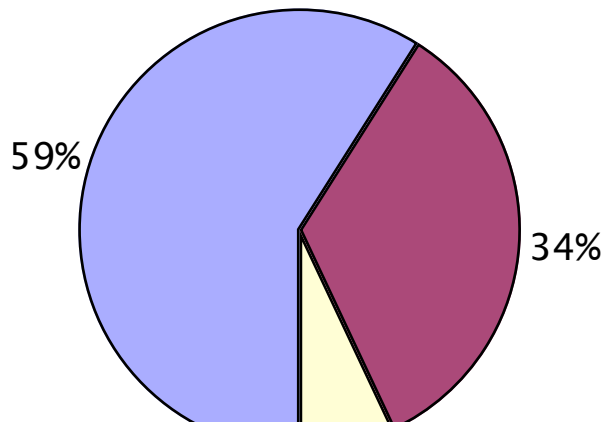
- 33% of the downtown businesses responded to the survey questions
- Total of 461 surveys received
- 34% of the surveys were completed online, compared to 27% in 2005



# BUSINESS PROFILE

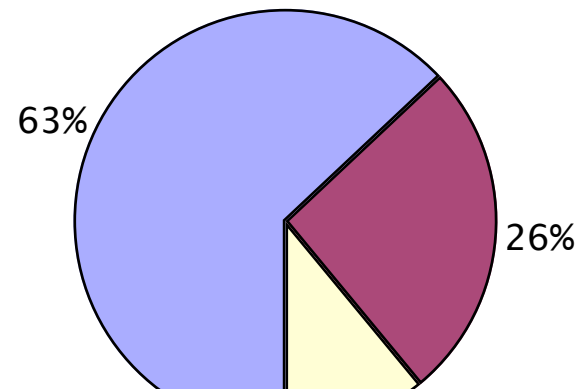
## Health of Business

2007



● Improved    ● Stayed the Same  
● Declined

2005



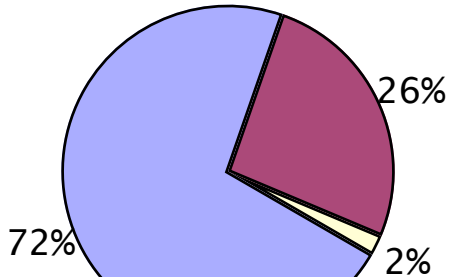
● Improved    ● Stayed the Same  
● Declined



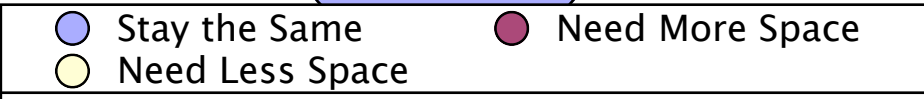
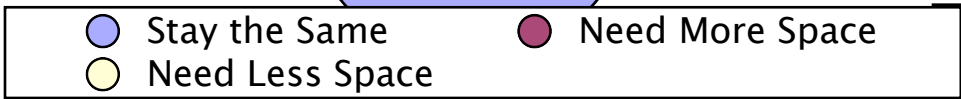
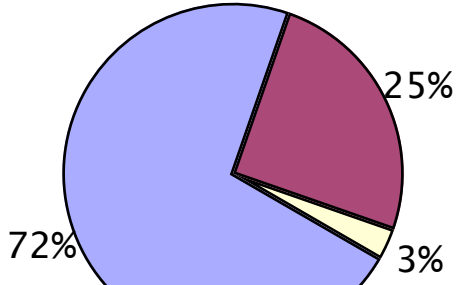


# Expansion Plans Over the Next Two Years

2007

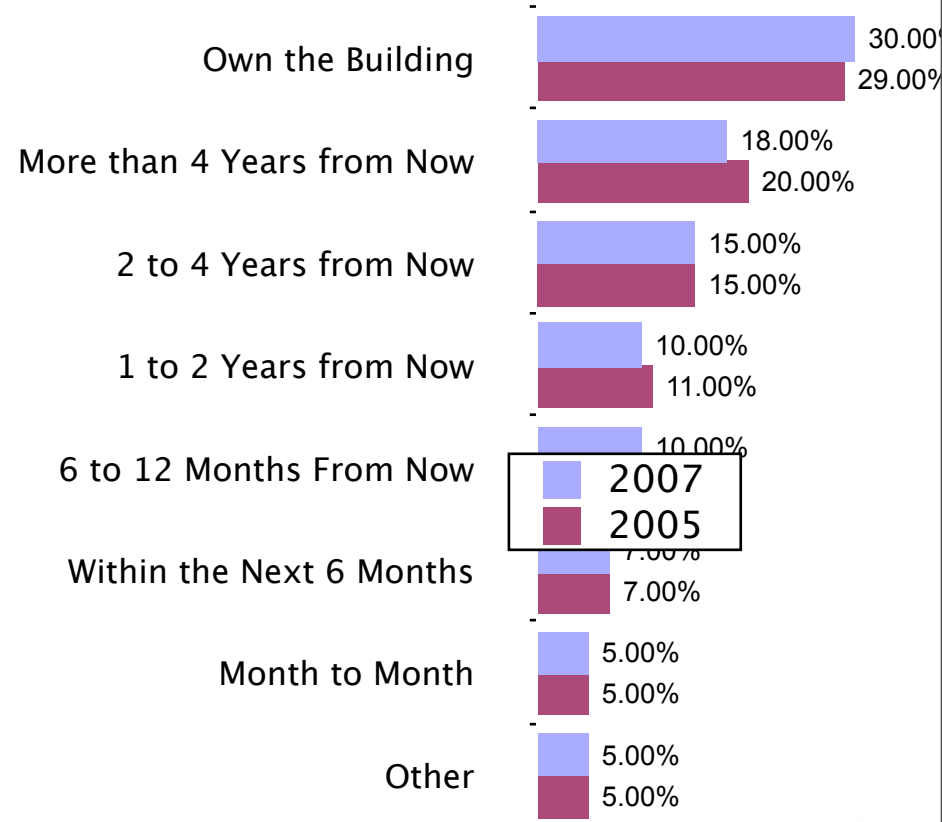


2005



# Lease Expiration

- A significant number of businesses have made long-term commitments to the downtown market
- **63%** own their building or have leases that expire in two or more years
- **22%** have leases that expire in a year or less

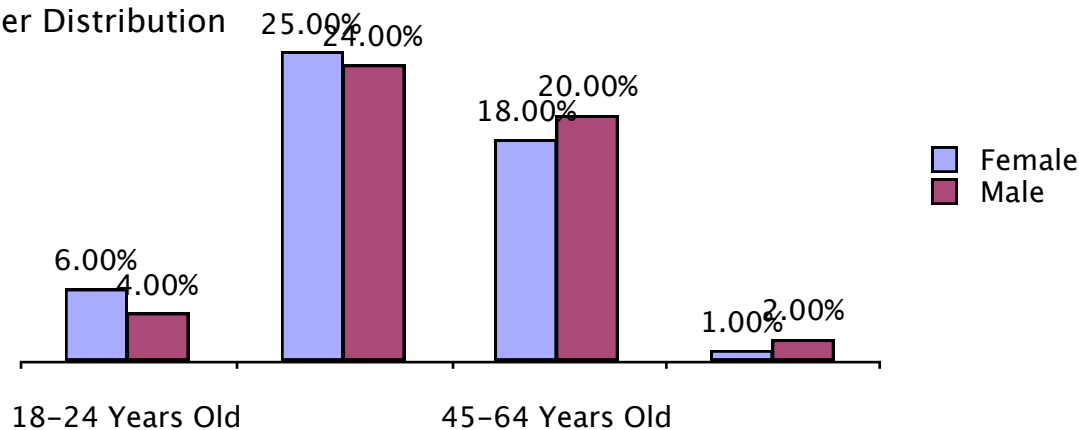


# EMPLOYEE PROFILE

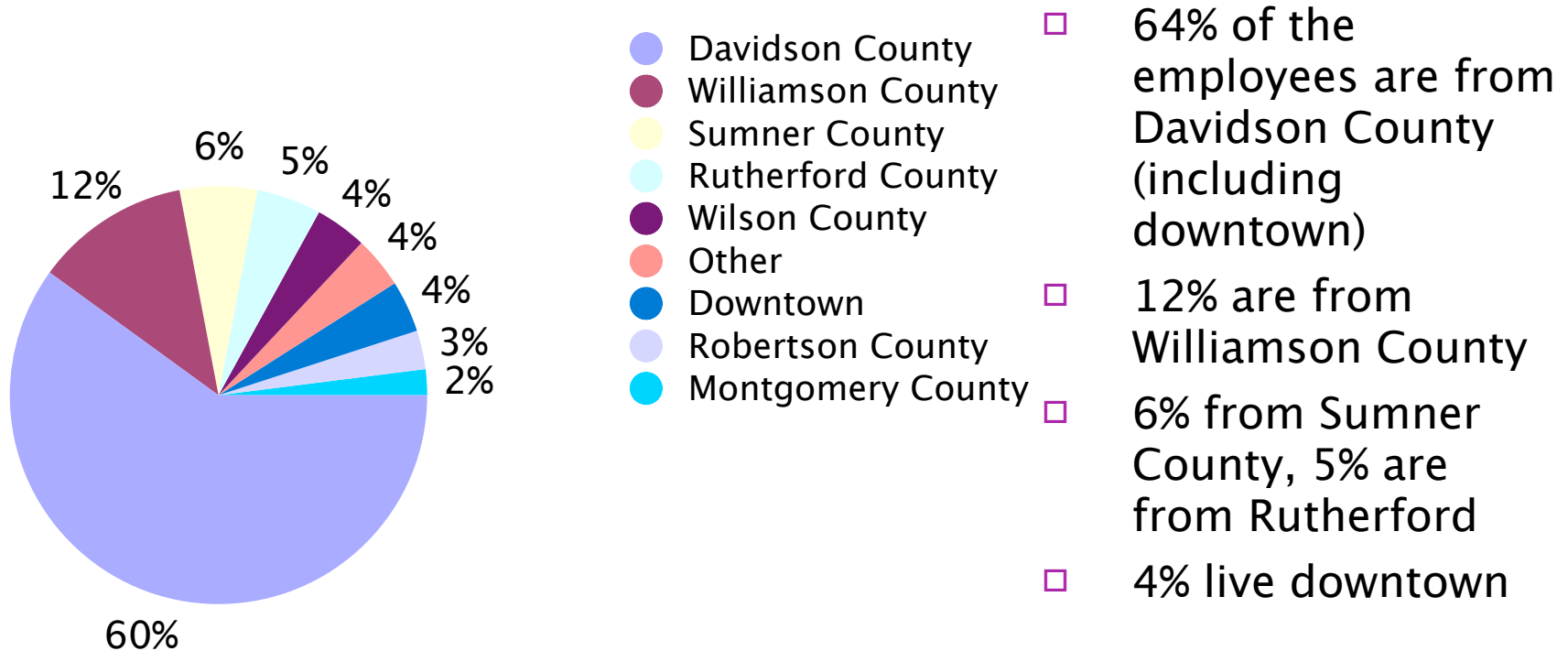
## □ Age and Gender Distribution

- 49% of the employees are in the 25–44 age group
- 38% are in the 45–64 age group
- 50% of the employees are male, 50% female

Employee Age and Gender Distribution

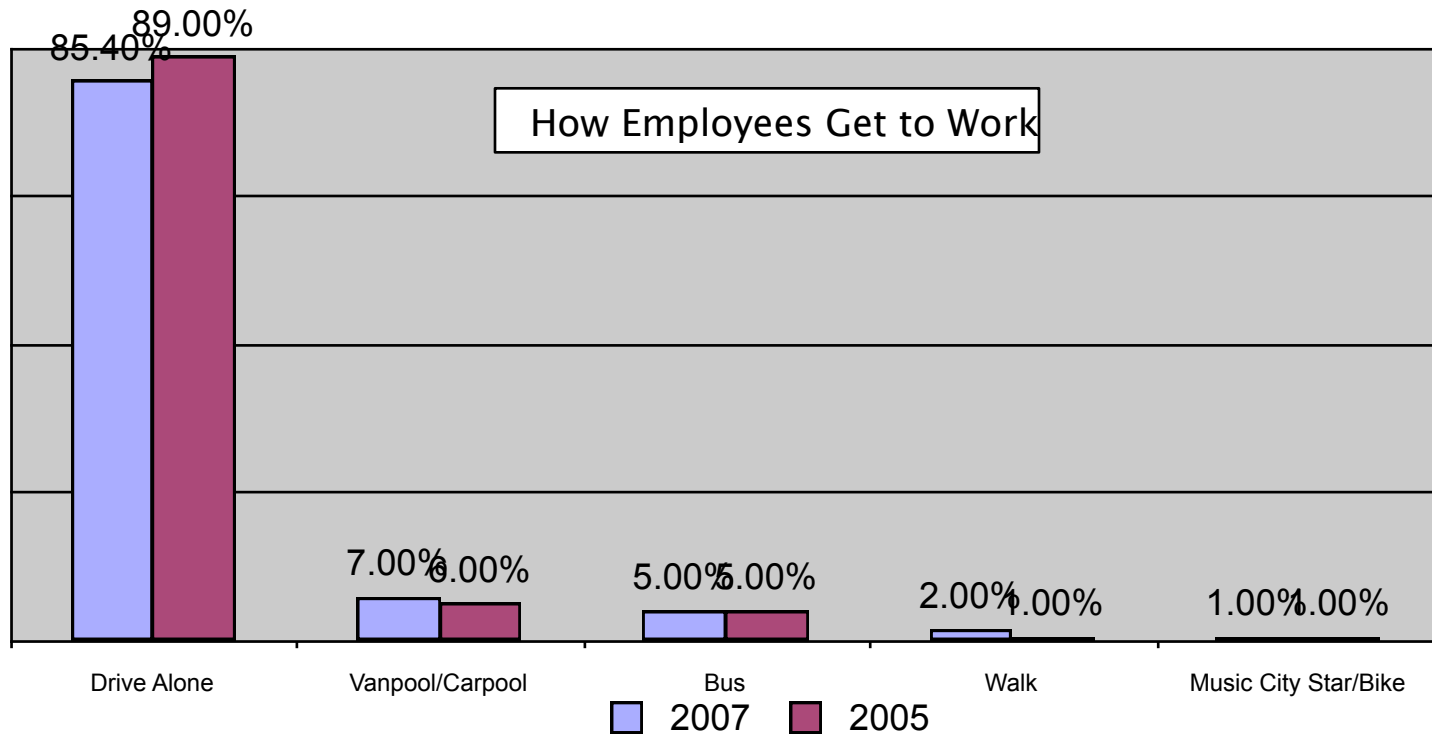


# Where Downtown Employees Live



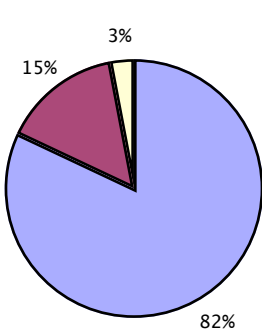
# Transportation to Work

- 85% of the employees drive to work alone, compared to 89% in 2005
- Increase in carpool/vanpool and walking to work categories

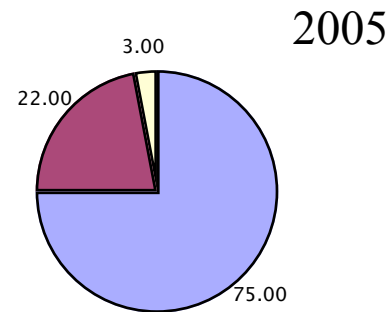


# Parking

- 82% park in a garage or lot paid for or owned by their company, compared to 75% in 2005



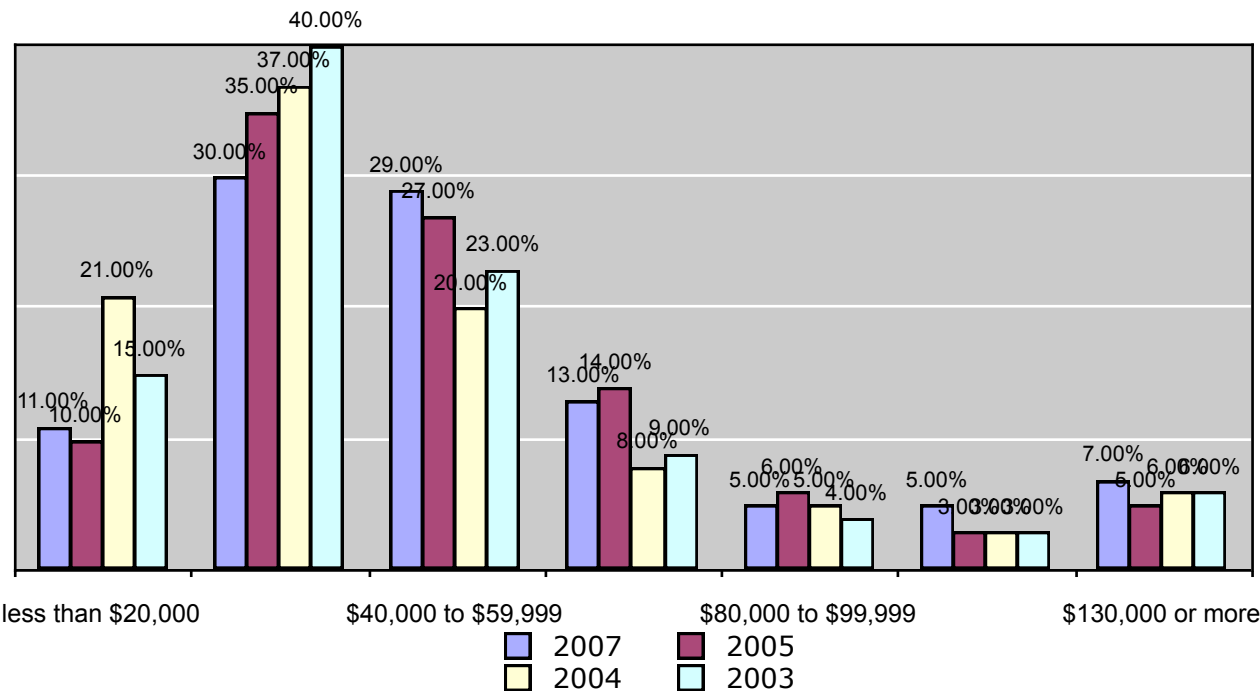
- Garage/Lot paid for or owned by Company
- Garage/Lot NOT paid for by Company
- On the Street



- Garage/Lot paid for or owned by Company
- Garage/Lot NOT paid for by Company
- On the Street



# Annual Salaries of Downtown Workforce

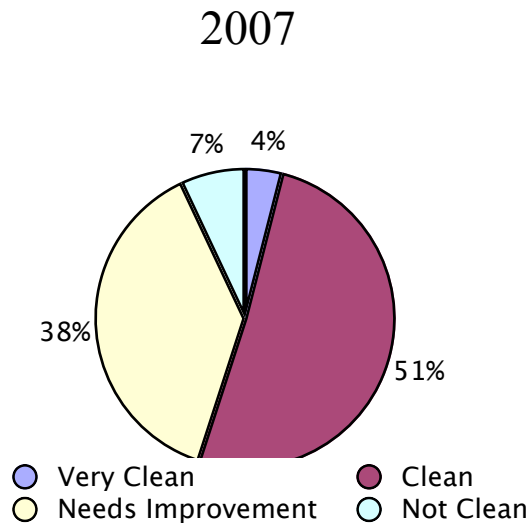


- Salaries have generally trended upward since 2003
- 29% are in the \$40,000 to \$59,999 annual salary range, compared to 20% in 2004
- 17% have annual salaries of \$80,000 or more, compared to 13% in 2003

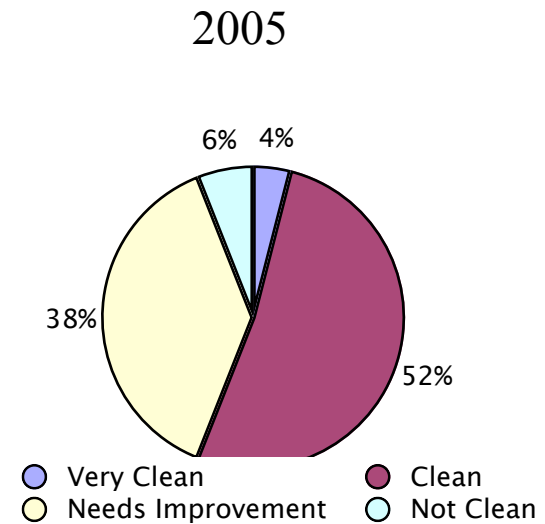


# Clean

- 2007: 55% describe downtown as clean or very clean

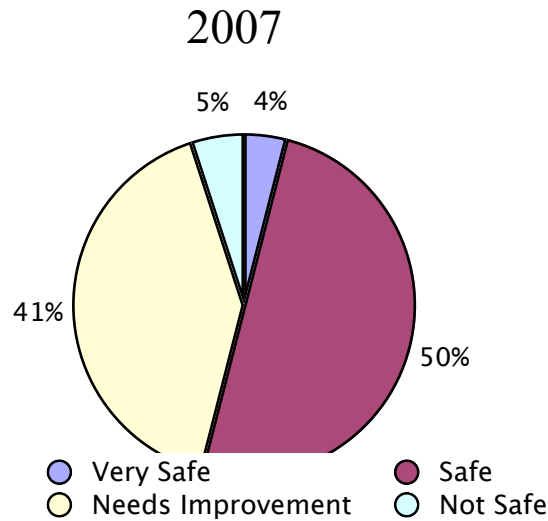


- 2005: 56% describe downtown as clean or very clean, compared to 61% in 2004

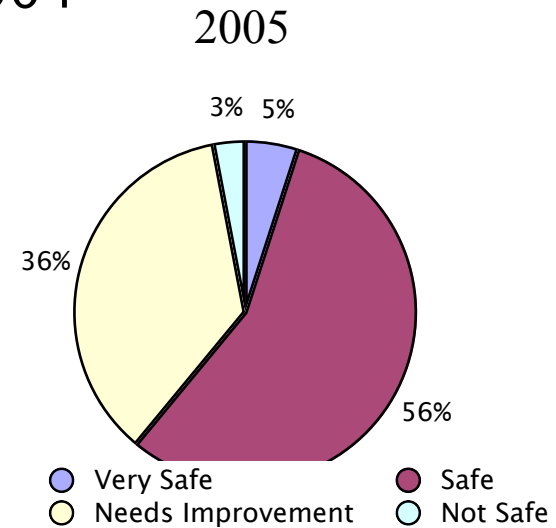


# Safe

- 2007: 54% describe downtown as safe or very safe

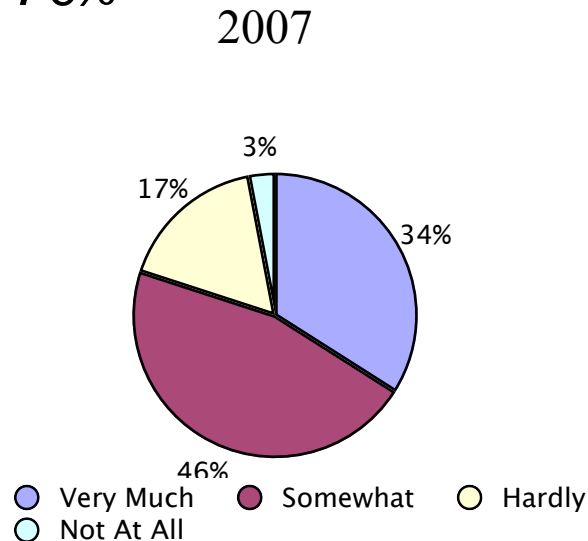


- 2005: 61% describe downtown as safe or very safe, compared to 48% in 2004

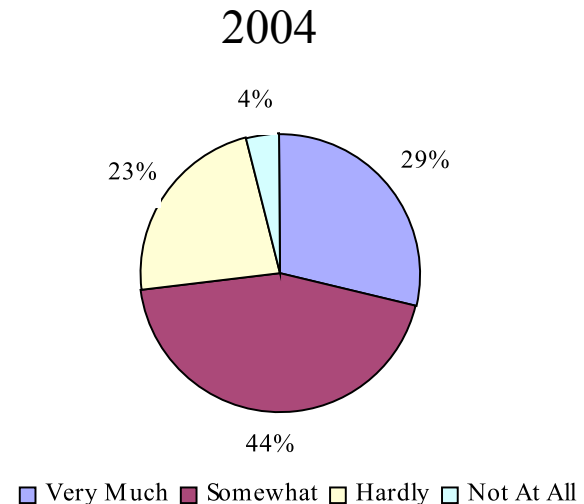


# Business Impact: Public Inebriates, Transients

- 2007: 80% say that public inebriates, transients affect their employees, clients. In 2005, the response was 76%



- 2004: 73% say that public inebriates, transients affect their employees, clients. In 2003, the response was 60%

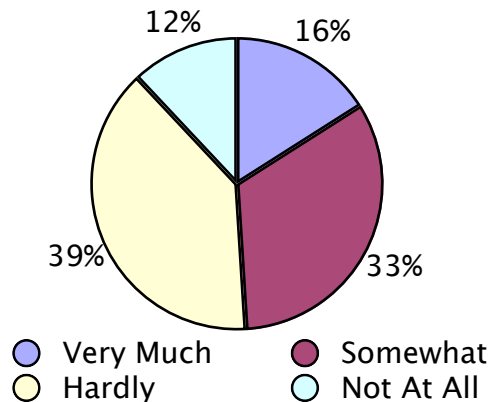


# Business Impact: Vandalism and Graffiti

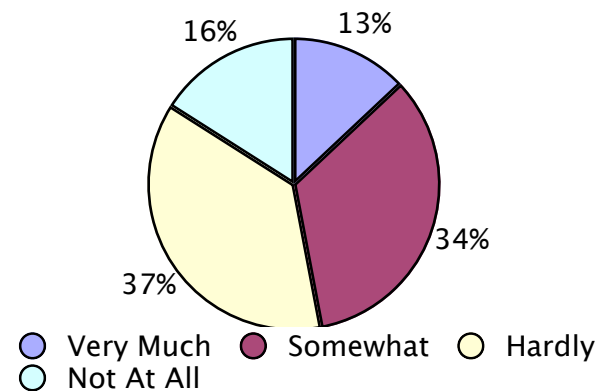
□ In 2007, 49% were affected by vandalism or graffiti

□ In 2005, 47% were affected

2007



2005



# Top Factors for Businesses Maintaining Their Downtown Presence: Location & Parking

<b>2007 Rank</b>	<b>Most Important Factors for Businesses Locating or Staying Downtown</b>	<b>2005 Rank</b>	<b>2004 Rank</b>
1	Central Location	1	1
2	Availability of Parking	2	2
3	Proximity to Government & Other Businesses	3	n/a
4	Cost of Parking	6	4
5	Access to Interstate System & Airport	4	3
6	Cleanliness	5	5
7	Atmosphere	7	7
8	Commercial Rental Rates	8	6



# Top Factors That Need Improvement

- 24% of the responses related to parking, compared to 33% in 2005
- 25% of the responses related to panhandlers/transients, compared to 28% in 2005

<b>2007 Rank</b>	<b>Elements that Need the Most Improvement Downtown</b>	<b>2005 Rank</b>	<b>2004 Rank</b>
1	Panhandlers	3	3
2	Availability of Parking	1	1
3	Transients	4	4
4	Cost of Parking	2	2
5	Retail Variety	5	5
6	Cleanliness	6	6
7	Public Transportation	7	
8	Pedestrian Safety	8	



# Top Five Write-In Categories for Downtown Improvements

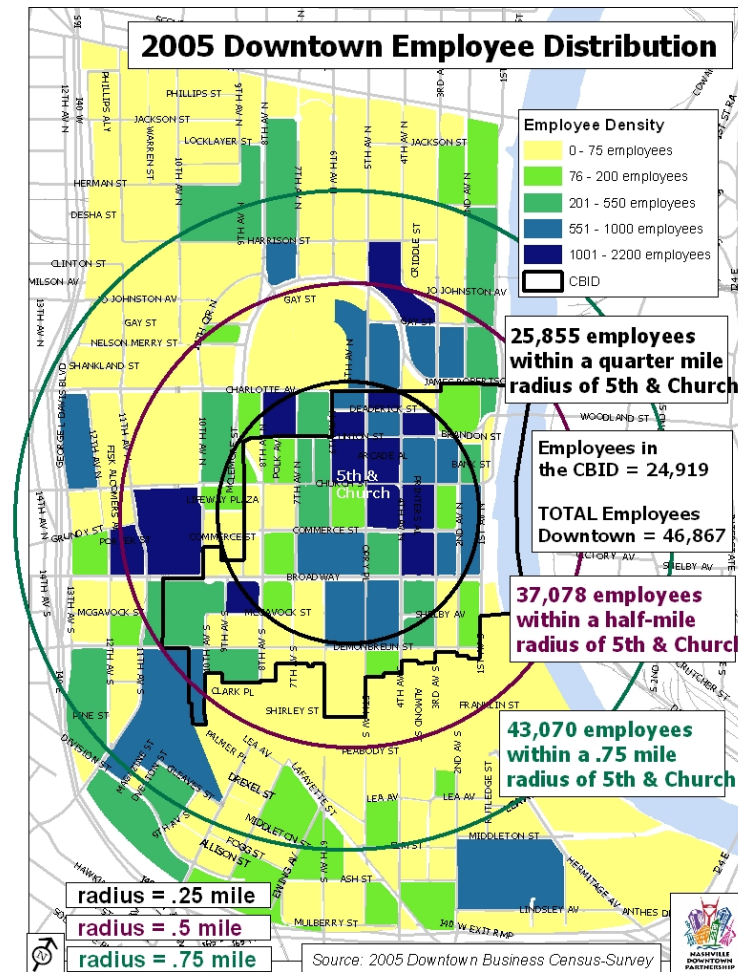
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1. Panhandling, Homeless, Transient and Vagrant Issues
2. Parking and Transportation Issues
3. Clean, Safe and Attractive Issues
4. Retail and Restaurant Issues and Suggestions
5. Business Development



# Customized Reports and Maps

- Customized reports, maps, and detailed data analysis are available from the Nashville Downtown Partnership (call 615-743-3097)
- Example: employee density map



# Contact Us

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