

2008 Downtown Nashville Business Census and Survey

Report of Findings

November, 2008





Scope and Purpose

- 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



2008 Methodology

- Set November 7 deadline to receive completed surveys
- Used bulk mailing service
- Staff follow-up calls and visits to collect data
- Temporary four-week employee made follow-up calls
- E-mailed reminders with links to survey online
- Report available to committees and staff for 2009 budget planning





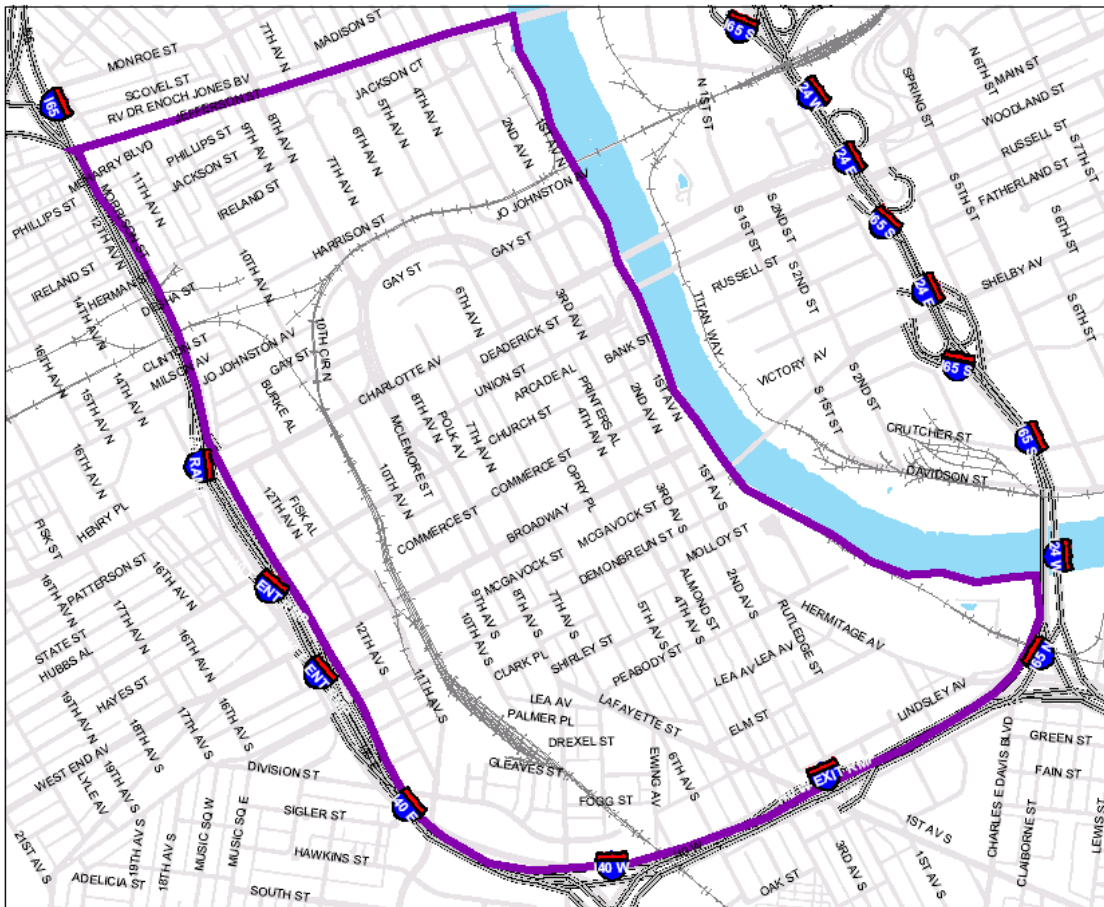
DOWNTOWN BUSINESS CENSUS 2008

- Total number of **1,398** downtown businesses, organizations, and governmental entities were identified within the defined study area
- Total number of **46,198** employees were reported for these businesses (decrease from 47,617 employees in 2007 and 46,867 in 2005)
- Responses reflected each organization's position as of October 1, 2008



Census-Survey Study Area

Downtown Business Census Boundary



- All enterprises within the Interstate loop on the west and south, the Cumberland River on the east, and Jefferson Street on the north.



Enterprises by Industry Sector

Code	NAICS Sector	Enterprises	Employees
92	Public Administration	142	12,458
51	Information, Publishing and Broadcasting	80	6,403
72	Accommodation and Food Services	184	5,432
5411	Legal Services	215	3,787
52	Finance and Insurance	104	3,128
54	Professional, Scientific and Technical Services	110	2,186
44	Retail and Wholesale Trade	183	1,955
71	Arts, Entertainment and Recreation	45	1,911
81	Other Services	125	1,509
48	Transportation and Warehousing	26	885
22	Utilities	6	845
32	Manufacturing	16	800
62	Health Care and Social Assistance	35	788
53	Real Estate, Renting and Leasing	61	669
23	Construction	14	546
56	Administrative and Support Services	22	520
61	Educational Services	8	418
55	Management of Companies and Enterprises	5	63
0	Unknown	0	601



Top 10 Downtown Employers

2008 Rank	Largest Downtown Employers	2007 Rank
1	State of Tennessee	1
2	Metropolitan Government of Nashville & Davidson County	2
3	US Federal Government	3
4	AT&T	4
5	LifeWay Christian Resources	5
6	<i>The Tennessean</i>	8
7	Nashville Electric Service	7
8	Nashville Symphony	
9 (tie)	Renaissance Nashville Hotel	
9 (tie)	Gresham, Smith & Partners	
9 (tie)	Central Parking of Tennessee, Inc.	





SURVEY RESULTS

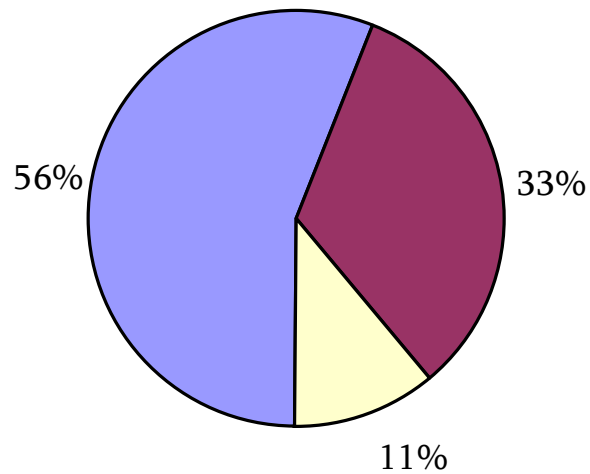
- 31% of the downtown businesses responded to the survey questions
- Total of 431 surveys received
- 32% of the surveys were completed online, compared to 34% in 2007



BUSINESS PROFILE

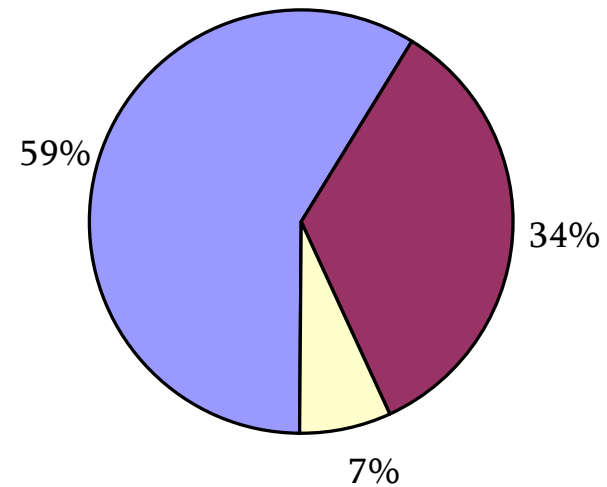
Health of Business

2008



■ Improved ■ Stayed the Same ■ Declined

2007

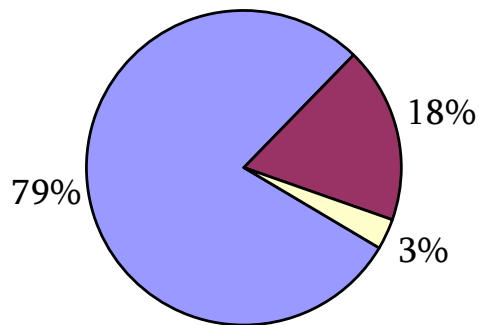


■ Improved ■ Stayed the Same ■ Declined



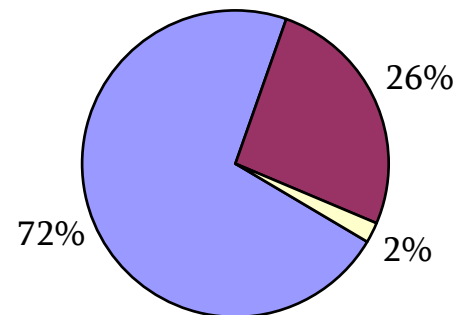
Expansion Plans Over the Next Two Years

2008



Stay the Same Need More Space Need Less Space

2007

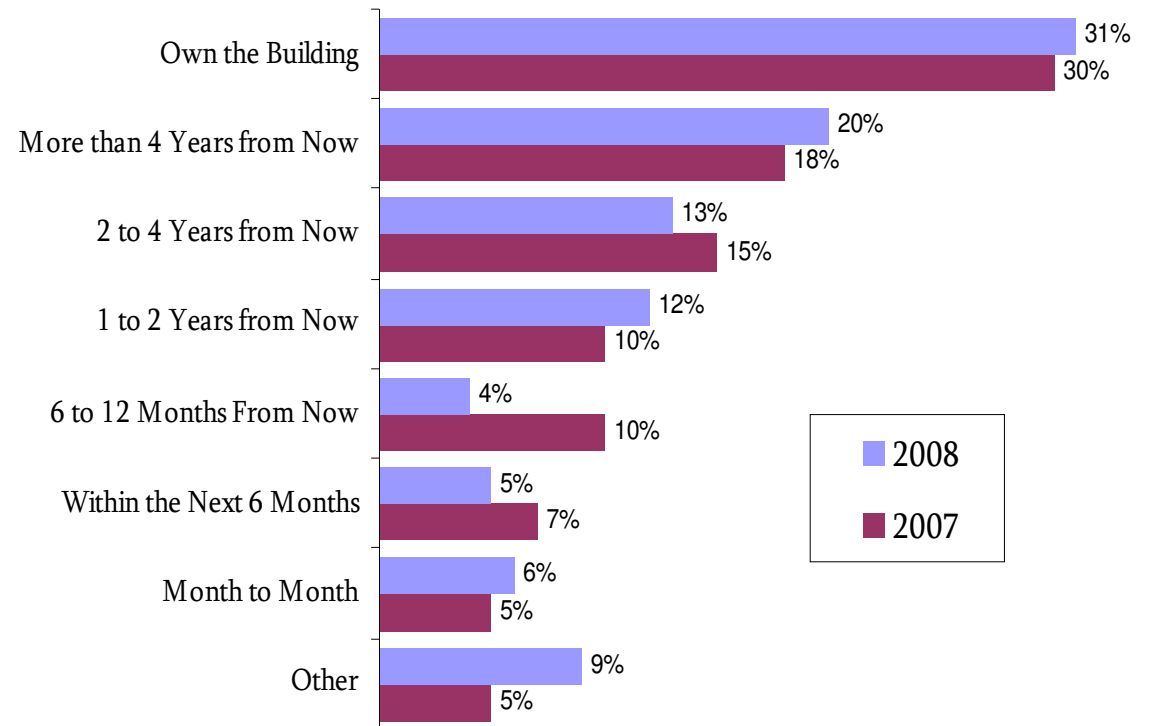


Stay the Same Need More Space Need Less Space



Lease Expiration

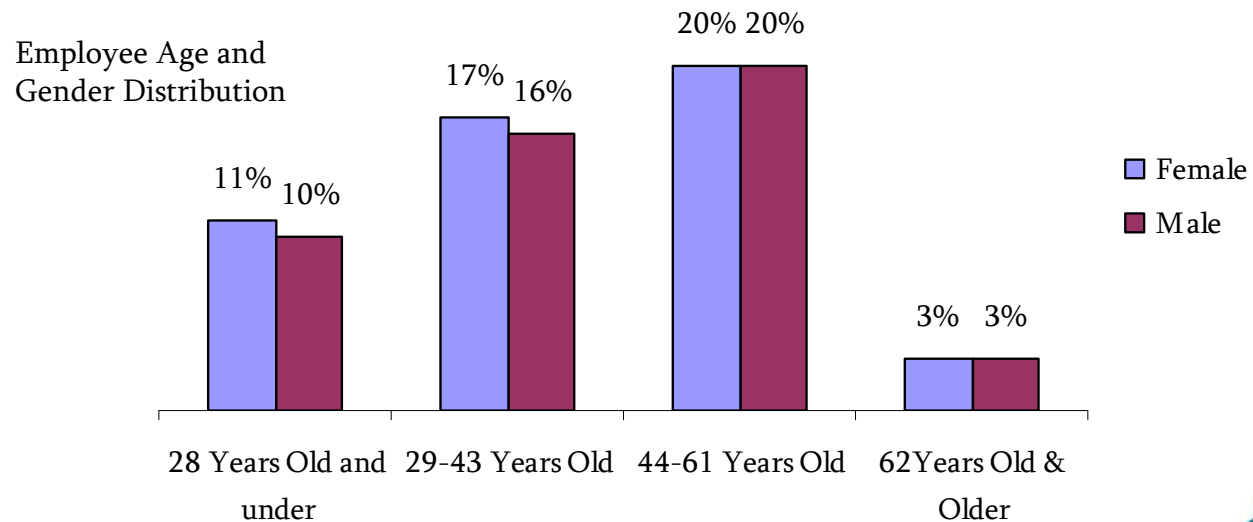
- A significant number of businesses have made long-term commitments to the downtown market
- **64%** own their building or have leases that expire in two or more years
- **15%** have leases that expire in a year or less



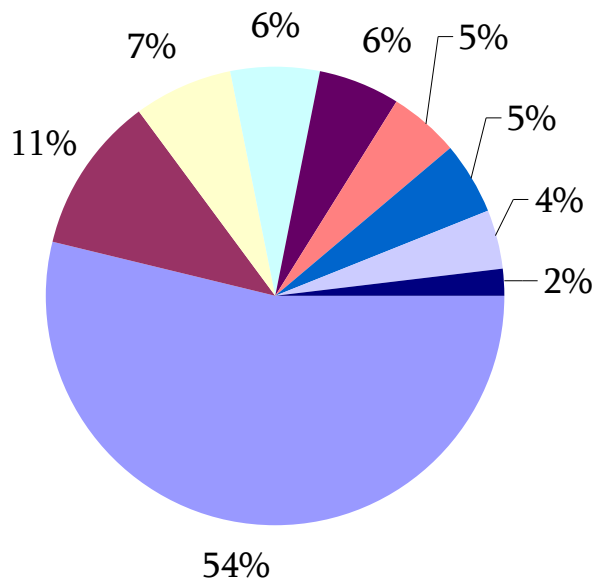
EMPLOYEE PROFILE

- Age and Gender Distribution

- n 33% of the employees are in the 29-43 age group, Gen X
- n 40% are in the 44-61 age group, Baby Boomers
- n 49% of the employees are male, 51% female



Where Downtown Employees Live



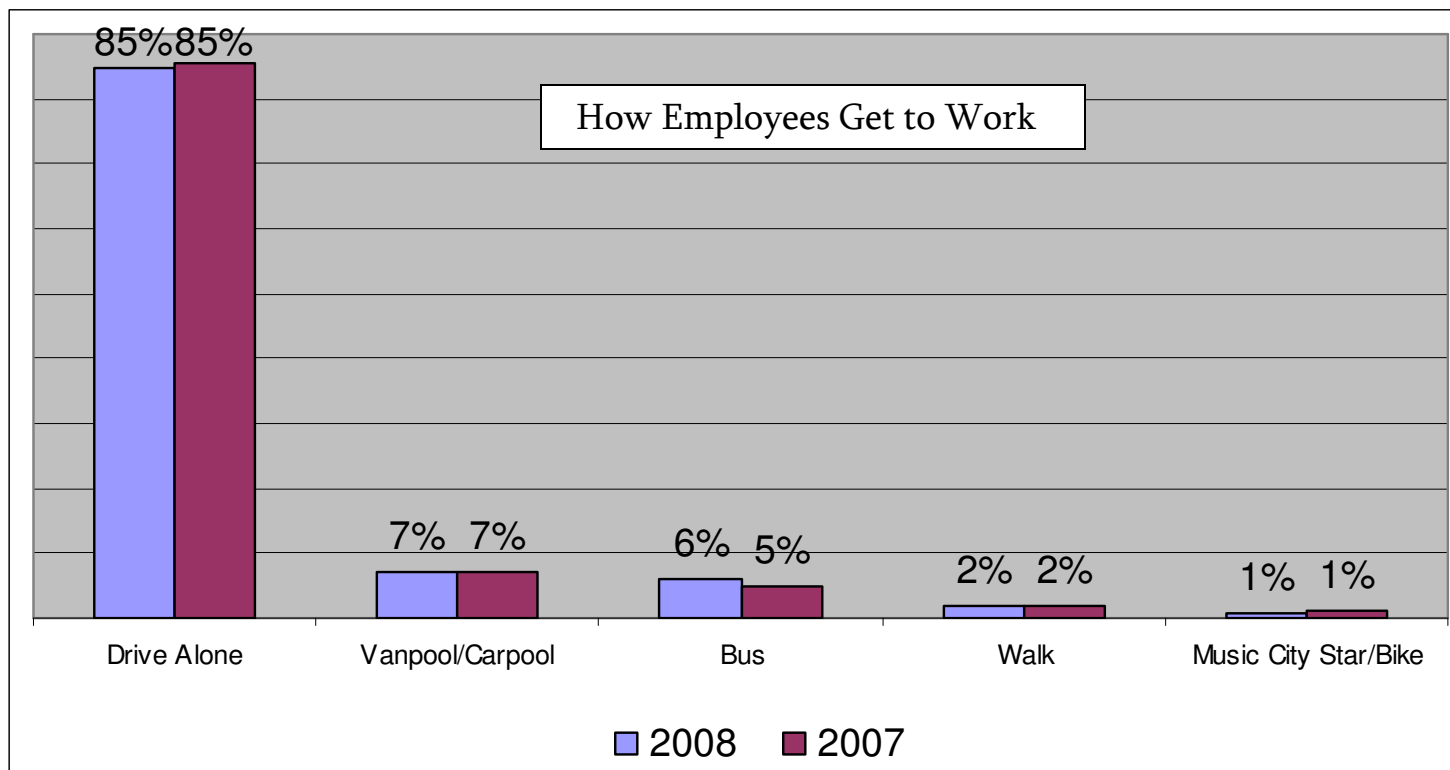
- Davidson County
- Williamson County
- Sumner County
- Rutherford County
- Wilson County
- Other
- Downtown
- Robertson County
- Montgomery County

- 59% of the employees are from Davidson County (including downtown)
- 11% are from Williamson County
- 7% from Sumner County, 6% from Rutherford and Wilson
- 5% live downtown
- Downtown and most outlying counties went up by 1% each this year, Davidson went down



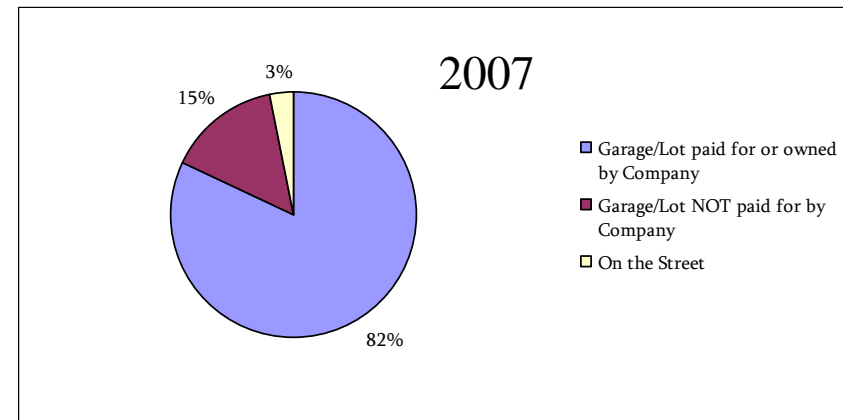
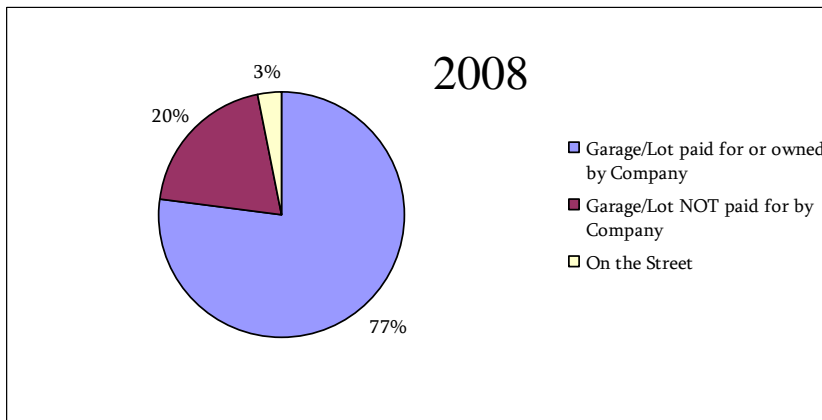
Transportation to Work

- 85% of the employees drive to work alone
- Slight increase in bus ridership
- Increase in Music City Star ridership from .3% in 2007 to .7% in 2008

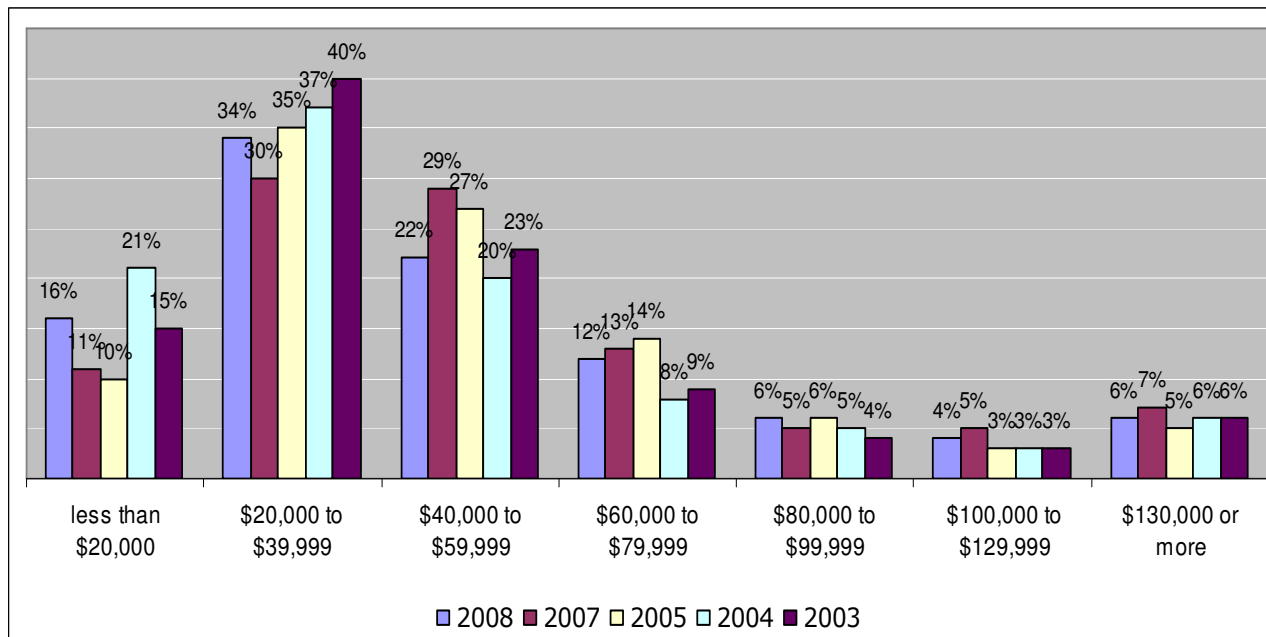


Parking

- 77% park in a garage or lot paid for or owned by their company, compared to 82% in 2007 and 75% in 2005
- A larger number of merchant groups (retailers, restaurants, hotels, etc.) participated. These groups often do not reimburse for employee parking



Annual Salaries of Downtown Workforce



- Salaries have generally trended upward since 2003
- 16% have annual salaries of \$80,000 or more, compared to 13% in 2003

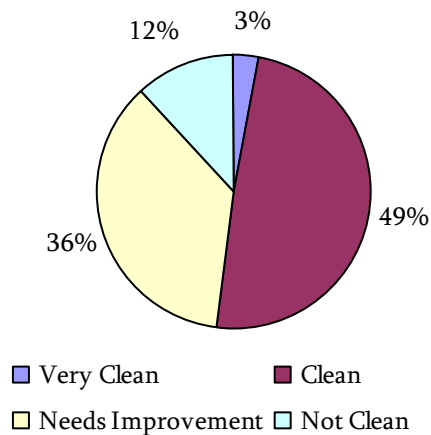




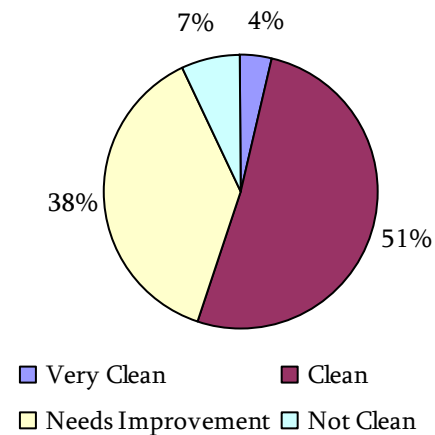
Clean

- 2008: 52% describe downtown as clean or very clean
- 2007: 55% describe downtown as clean or very clean

2008

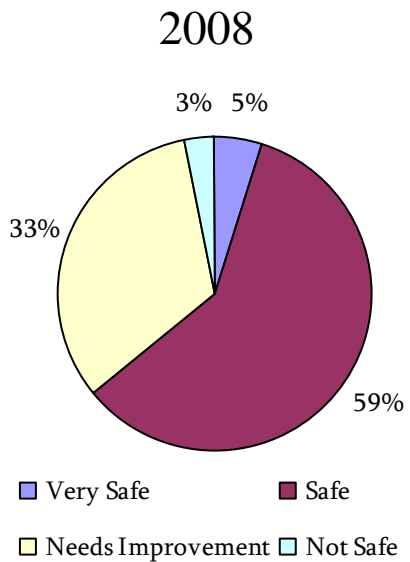


2007

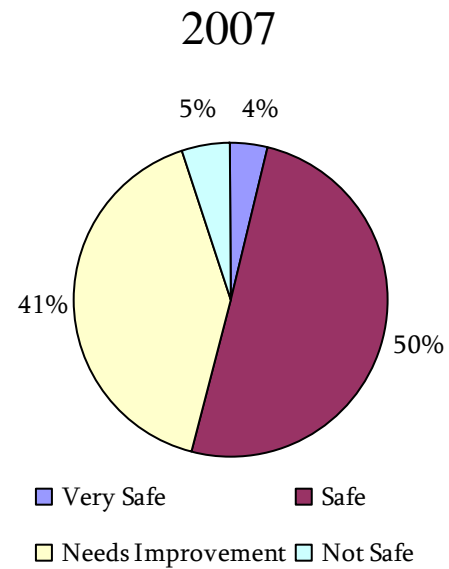


Safe

- 2008: 64% describe downtown as safe or very safe

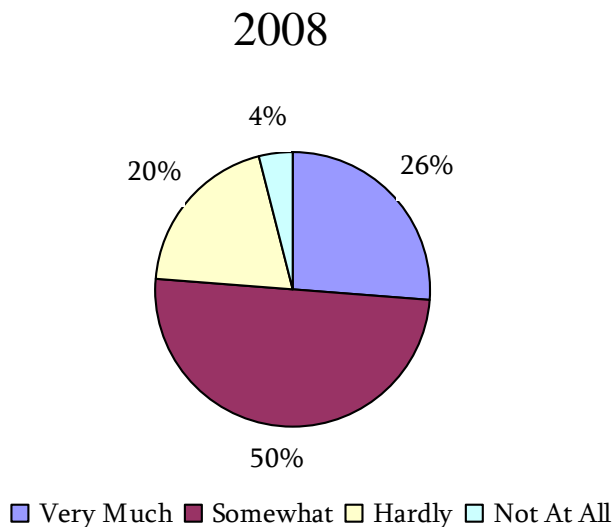


- 2007: 54% describe downtown as safe or very safe, compared to 61% in 2005

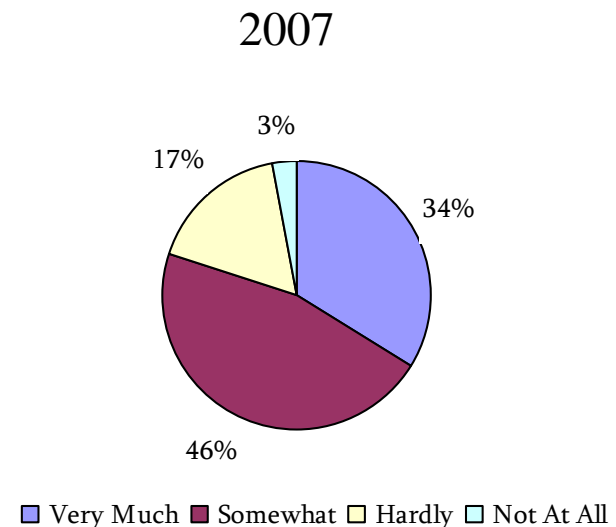


Business Impact: Public Inebriates, Transients

- 2008: 76% say that public inebriates, transients affect their employees, clients



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

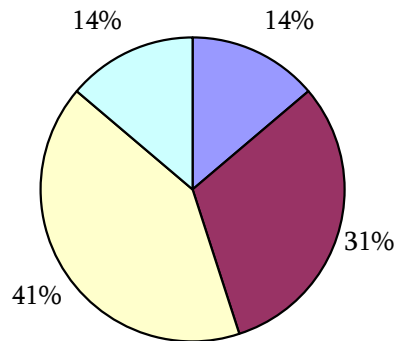


Business Impact: Vandalism and Graffiti

○ In 2008, 45% were affected by vandalism or graffiti

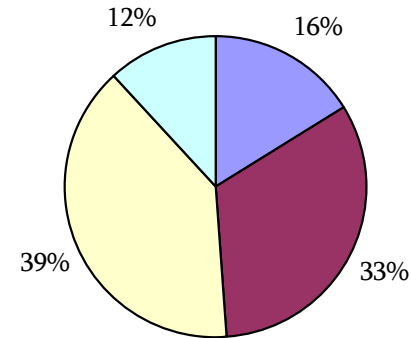
○ In 2007, 49% were affected

2008



■ Very Much ■ Somewhat ■ Hardly ■ Not At All

2007



■ Very Much ■ Somewhat ■ Hardly ■ Not At All



Top Elements for Businesses Maintaining Their Downtown Presence: Location & Parking

2008 Rank	Most Important Factors for Businesses Locating or Staying Downtown
1	Cost/Availability of Parking
2	Central Location/Interstate & Airport Access
3	Proximity to Government & Businesses
4	Atmosphere & Energy
5 tie	Cleanliness
5 tie	Commercial Rental Rates
7	Density of People
8	Nightlife/Entertainment



Top Factors That Need Improvement

- 13% of the responses related to parking, compared to 24% in 2007
- 14% of the responses related to panhandlers/transients, compared to 25% in 2007
- Retail Variety scoring higher each year

2008 Rank	Elements that Need the Most Improvement Downtown
1	Panhandlers/Transients
2	Cost/Availability of Parking
3	Retail Variety
4	Cleanliness
5	Public Transportation
6	Safety
7	Convention Center
8	Riverfront Development



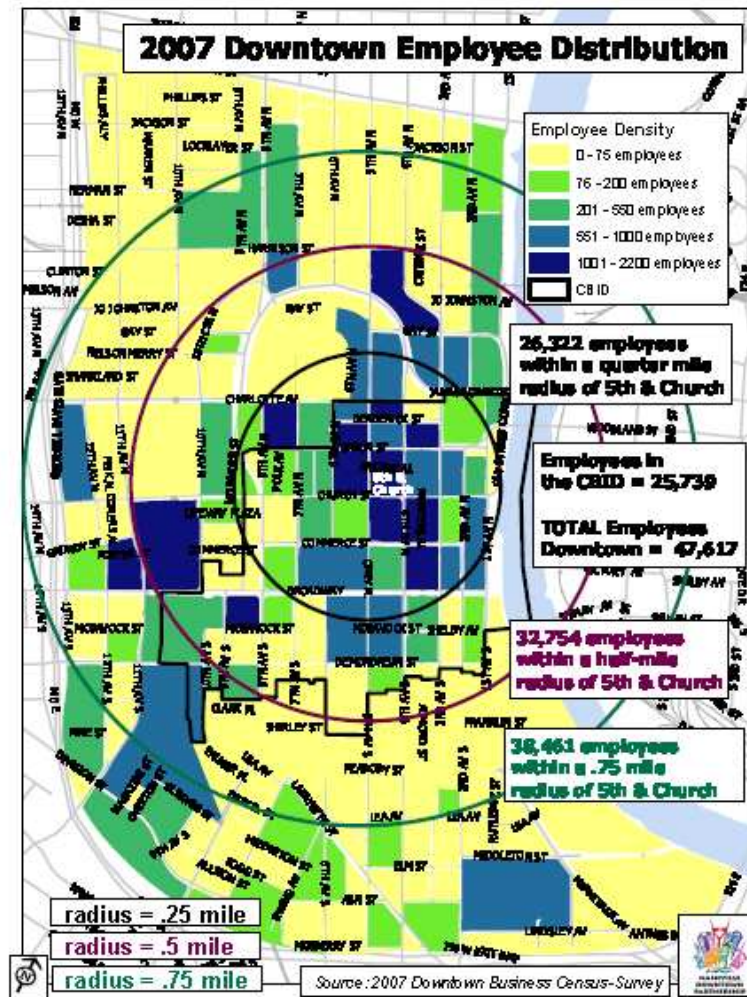
Top Five Write-In Categories for Downtown Improvements

1. Panhandling, Homeless, Transient and Vagrant Issues (35% of write-in comments)
2. Parking and Transportation Issues
3. Safety Issues: vandalism, car break-ins, need for increased Police foot patrols
4. Public Space and Cleanliness Issues: parks, landscaping, maintenance of vacant buildings
5. Need for more family-friendly activities and establishments



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





References

- The 2007 North American Industry Classification System (NAICS) was used to define the industry sectors of each enterprise in the study area
- 2008 Downtown Nashville Business Census-Survey form at http://www.nashvilledowntown.com/work/2008_business_census.pdf





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