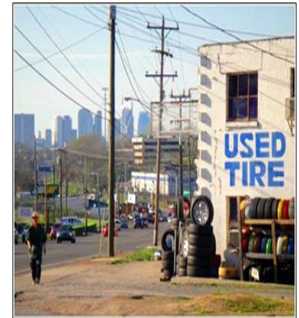


# **NOLENSVILLE PIKE**

## ***Market Analysis***



## ***Volume 1: Strategic Recommendations***

*Prepared for the Metropolitan Government of Nashville & Davidson County  
January 27, 2011*

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## **EXECUTIVE SUMMARY**

This two-volume report provides findings and recommendations from a market analysis for the Nolensville Pike Corridor in Nashville. The market analysis was completed to help inform the policies contained in the *South Nashville Community Plan* and the *Nolensville Pike Corridor Detailed Neighborhood Design Plan (DNDP)*. An understanding of the corridor's economic base and its potential market help provide information not only for planning and design but also pro-active economic development and revitalization of the corridor. Ultimately, the market analysis provides guidance for strengthening the corridor as a community asset as well as an economic driver for the Nashville region. Key strategies and policy recommendations for the corridor are summarized in Volume 1 of this report. The detailed market findings, which form the basis for the strategies and policies, are provided in Volume 2.

### **Key Market Findings**

The market analysis forecasted the potential market demand for office, industrial, residential, and retail uses in the Nolensville Pike Corridor and adjacent blocks, from the I-65 Inner Loop south to the Nashville Zoo at Grassmere. In addition, a "market opportunities" assessment was conducted that identified existing opportunities for development of lodging facilities, conference venues, and audience support facilities within the corridor, but without forecasting future market demand for these uses.

#### **Retail**

The market analysis determined that there is future growth potential for all of these uses largely due to the competitive location of the corridor within the region's densely-populated southeast commutershed and the exposure generated by an average 60,000 cars traveling on Nolensville Pike each day. *Nolensville Pike is a corridor of regional significance* that creates broad-based destination marketing opportunities. The road's excellent exposure helps to conservatively support potential demand for another 110,000 square feet of retail space in the near future, above and beyond the 500,000 square feet of existing retail uses.

The corridor's existing retail activity is characterized by smaller, locally-owned businesses that tend to cater to a foreign-born or international market concentrated in the southeastern quadrant of the city. This international character provides a potential unique strength for "identity marketing" of the corridor as a destination. Identity marketing is a key strategy employed in urban areas to recapture retail sales that are lost through "leakage" to suburban areas.

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At the same time, an existing over-supply of automotive sales, supply, and service businesses in this market impacts on the corridor's appeal as a retail shopping destination. Overall, the results of the market analysis were used to recommend an appropriate business mix that would help the corridor capture forecasted market demand, and to diversify the business mix in order to maximize the corridor's economic potential.

The poor physical appearance of the corridor, both north and south of I-440, is also a serious hindrance to effective marketing for both existing and potential new businesses. The corridor's ability to capture potential destination retail demand is predicated on improvements being made to the appearance of Nolensville Pike and on pro-active marketing and business development strategies that enhance the destination potential of the area.

### **Residential**

The appearance of the corridor and its retail uses also impact on the marketability (and property values) of housing in the neighborhoods adjoining the corridor. Nolensville Pike, like many of Nashville's highway corridors, acts as the "front door" or the face for neighboring residential communities. As such, the appearance of these corridors impacts on the overall marketability, value, and quality of life in the adjoining neighborhoods. The market analysis forecasted potential for up to 600 rental and for-sale housing units in the corridor by 2020, again assuming that the appearance of the corridor is improved and an *attractive environment* is created to support housing and mixed-use development. Some of the housing demand is also predicated on the assumption that new employment opportunities are created (such as proposed by Metro Government through office and industrial development at the Fairgrounds and other sites) in the corridor.

### **Office and Industrial**

The area north of I-440 remains competitive for office and industrial uses because of its excellent access to the interstate system (I-440, I-65, and I-24/40), Nashville International Airport, a large labor base, executive housing (in areas like Brentwood), a major CSX rail / logistics hub, and downtown Nashville. The area saw a long decline in its industrial base, but more recently, new industrial users have again been attracted to this location due to its excellent accessibility. This area is among Nashville's more competitive for retaining and attracting manufacturing jobs, especially those in specialty craftwork and highly-skilled production.

The market analysis forecasted demand for about 430,000 square feet of industrial space and 280,000 square feet of office space by 2020. This assumes, again, that an environment is created to support redevelopment and new construction of office and industrial uses within the area. Additional "drop-in" opportunities for office and industrial use may exist beyond these market-based

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forecasts if Metro Government is aggressive in pro-actively marketing and recruiting major employers that would not have otherwise entered this market. In fact, the Mayor's Office of Economic Development and the Nashville Chamber are engaged in such recruitment, targeting new opportunities especially for corporate office development at the Fairgrounds site.

### **Other Opportunities**

The opportunities assessments identified other prospects including sports (i.e., soccer) and sports-oriented entertainment venues, meeting and exhibition space, and lodging facilities in the Nolensville Pike Corridor. Zoo-themed lodging, retail, attraction, and restaurant opportunities were identified, along with the prospect of lodging facilities at I-440 with access to existing and emerging business nodes. Nolensville Pike's tourism and business development could synergize well with the marketing of the city's new Music City Center, the convention center under development not far from 4<sup>th</sup> Avenue South (Nolensville Pike).

## **Key Strategies and Policy Recommendations**

Based on the findings of the market analysis, strategies and policy recommendations are provided to help guide planning, design, and economic development within the corridor.

### **Segments, Districts and Nodes**

The extensive length of the corridor encompasses various sub-markets across a diverse development context. To address the specific marketing considerations within the study area, the corridor is disaggregated into several segments. Specific districts and/or nodes are identified within each of these segments where infrastructure, urban design, marketing strategies, and development policies are unique. The primary marketing segments include NAIBO, Fairgrounds Green Gateway, and the International Corridor.

**NAIBO** is a proposed Nashville Artisanal Industry Business Organization, center of a revitalization strategy built around the





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marketing, retention, and recruitment of businesses engaged in the manufacture or distribution of hand-made, artisanal, and specialty products. A number of these businesses already exist in the area and there is the opportunity to build on this strength and on the area's industrial heritage to grow these businesses on a city-wide basis. Several districts within this segment are designated. First, the 4<sup>th</sup> Avenue-Chestnut Mixed-Use District would extend south from I-65 to Chestnut Street. Planning and design considerations in this area focus on physical improvements to, and integration of, industrial businesses with the Chestnut Hill neighborhood. In the Chestnut Square Artisan Industrial Area (around Chestnut Street and 4<sup>th</sup> Avenue South), there would be a focus on industrial heritage, including reuse of the former mills and industrial buildings along with streetscaping to enliven this area. Physical upgrading of the mixed industrial/service and residential area of "Chestnut South" is recommended for the area south of Chestnut to the where 4<sup>th</sup> and 2<sup>nd</sup> Avenues split.

**Fairgrounds Green Gateway** is a marketing and redevelopment concept for the segment of the corridor located between the "split" (where Nolensville Pike splits into 2<sup>nd</sup> and 4<sup>th</sup> avenues) and I-440. This area has long served as home to the Tennessee State Fairgrounds but also to a diverse commercial and industrial business mix. The overall character of the area is driven by the industrial uses, aligned with railroads that cross Nolensville Pike in this area. This area has attracted new industrial uses, despite its lack of definition and otherwise poor physical environment. The concept for redevelopment in this area includes the proposal for Fairgrounds Green, a mixed-use node at the Fairgrounds site. This concept would include development of a LEED-certified "green" office/mixed-use node as a major employment driver for the region. Because of the area's excellent accessibility to the interstate system, downtown, and the airport, there is the opportunity to establish a stronger job base in this area.

There is also the alternative concept introduced for a destination sports, recreation, entertainment, and retail node ("Futbol City"), due to the market opportunities for soccer stadium, sporting goods stores, destination retail, and sports-themed entertainment. Also within this segment is the need to define and strengthen the existing industrial uses into designated, marketable parks (conceptualized herein as the "Rosedale Industrial Park" and the Interstate Boulevard Business Park). Commercial uses in this segment would be concentrated only at key nodes, such as at Nolensville Pike and I-440, where there is also the opportunity for hotel development. Ultimately, the market analysis suggests that these development concepts are only possible if improvements are made to the physical environment, such as through landscaping and other streetscape amenities.

**The International Corridor** would stretch from I-440, south through the study area to Grassmere and beyond (perhaps to Harding Place). The concept of this marketing and revitalization strategy is to build on the unique, international character of the area to help create an identity marketing strategy. In doing so,

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the market can be broadened regionally and can also help strengthen Nashville's tourism and convention base. This segment is characterized at present by an agglomeration of small but relatively successful businesses that largely cater to a foreign-language clientele. On the other hand, the segment is also characterized by its cluttered physical appearance and highway-oriented retail development, with a sea of used car lots, temporary structures, signage clutter, and traffic. Developing a more attractive physical environment is key to improving the overall competitiveness of this corridor and enhancing business performance, investment potential, and tax base, not to mention livability for residents of adjoining neighborhoods.

Here, the segment is disaggregated into several districts. To the north, the Woodbine area (Madreselva in Spanish) can be strengthened through creation of anchor uses and redevelopment at the Thompson Lane/Nolensville Pike intersection. A high-density, mixed-use redevelopment project is proposed at this intersection which could include retail, office space, and housing. This project could anchor redevelopment of a broader node surrounding the intersection and extending west to the railroad. The small industrial area east of the railroad would be transitioned over time into part of the broader mixed-use district.

South of Thompson Lane, the "Radnor Commercial District" (or Glencliff) would comprise several key nodes that would also serve as anchors for revitalization: Radnor/Nolensville, Harman/Wheeler, and Antioch Pike /



Nolensville. A concept for redevelopment at the Antioch Pike intersection and surrounding areas has been developed for the purposes of this study. This node would include an international market ("NolensVilla"), an international cultural center, and community non-profit offices as

anchors, in addition to other commercial uses and mid-density housing. Nashville's proposed new Hispanic Community Center could also be integrated effectively with this concept. Public transit stops (such as for a proposed streetcar system) would also be integrated here and throughout the corridor.

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A rendering of the concept and a conceptual site plan are provided here for illustrative purposes. It is important to note that, within these anchor nodes, redevelopment extends beyond the corridor onto adjacent streets integrated with neighboring residential communities. The purpose of these “bulb-outs” is to provide sufficient opportunity for redevelopment of a scale that can anchor broad-based revitalization. Development of a street grid around these nodes also helps to distribute traffic and parking, and to create safer, walkable mixed-use districts. Pedestrian activity is much more likely to occur in a walkable district than it would along the length of a linear road corridor.



Further south of this node, better definition is recommended for the Allied Drive Industrial Park, in order to help retain business and strengthen the area’s role as an industrial employment node.

**Zoo Node.** While the Nashville Zoo is located just beyond the southern tip of the study area, the market analysis identified an important opportunity to build on the zoo’s critical market base. The zoo attracts up to one million visitors per year, including a large number of tourists. Development of a viable zoo-oriented commercial node surrounding the zoo is recommended that would include themed restaurant, retail, and possibly lodging. Together with the International Corridor, the Artisan Industrial districts, and the Fairgrounds Green employment node, the zoo helps solidify Nolensville Pike’s role as a destination for business and tourism.

### **Planning and Economic Development**

These redevelopment concepts were translated into a host of planning and economic strategies for the corridor, some of which call for modification of policies contained in the *South Nashville Plan* and the *Nolensville Pike DNDP*. Underpinning these recommendations, the market analysis has noted the importance of Nolensville Pike as a corridor of regional significance, which means that there are regional economic and transportation considerations that include but also extend beyond the needs of adjacent residential communities. Both the needs of those communities, as well as regional opportunities, can be realized through strategic planning.



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**Use of Nodes and Districts.** Metro Planning has asserted the need for creating walkable neighborhoods throughout the city. As a long highway commuter corridor carrying heavy traffic loads, the entire length of Nolensville Pike cannot be easily transformed into a walkable neighborhood street. Rather, the opportunity is there to establish key nodes and districts where walkability can be encouraged and where key destination uses can be established that would help anchor revitalization of the corridor. Redevelopment within these key nodes should be encouraged through supportive planning policies (e.g., density bonuses) and infrastructure, but also through more pro-active economic development policies and incentives such as property tax abatements and small business loans. Metro Planning and Economic Development can assist with facilitating land assembly for anchor projects by bringing property owners, businesses, other Metro agencies, development partners and other stakeholders together to create strategic partnerships.

Redevelopment is also encouraged through “bulb-outs” or expansion in the area surrounding the nodes to include neighboring streets to the east and west, beyond the commercial strip of Nolensville Pike. There would be appropriate transitions in density from the intense, mixed-use center to lower-density residential development surrounding the nodes. Walkability is more likely to be achieved in a real sense if people are able to park, transit, and walk within a safe environment to live, work, shop, and play. Creating these larger “bulb-out” districts, with a “grid” street pattern that distributes traffic from the main corridor, can help create more walkable, integrated/mixed-use neighborhoods.

Redevelopment within the major nodes will help change the market dynamics, helping the area capture more destination markets, and gradually resulting in progressive land use changes in the corridor. While existing regulatory policies help control the further spread of auto-oriented businesses, the healthy diversification of the corridor’s commercial business base can best be achieved by strengthening the market for non-automotive uses and by marketing and recruiting new businesses with the help of targeted incentives. Small businesses help create jobs and their growth should be encouraged in such areas as NAIBO and the International Corridor.

**Preserve Opportunities for Small Businesses.** The market analysis forecasted demand for various uses, including housing. However, there was not sufficient housing demand in the foreseeable future to fill the amount of housing/mixed-use buildings conceptualized in the *Nolensville Road DNDP* throughout the corridor. Further, the wholesale redevelopment of the International Corridor segment of the study area for new, mixed-use buildings would reduce opportunities for small, home-grown retailers to be able to afford commercial space in the corridor. The result would be an emphasis on chains and large-scale stores that would endanger the destination marketing opportunities built on the development of diverse, unique and locally-owned businesses. As such, the study again recommends that redevelopment be



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concentrated within the key nodes and that the opportunity for small-scale retail be preserved between these nodes in the International Corridor segment of the study area. Office uses are encouraged, but ground-floor commercial space should be reserved mainly for retail uses within the International Corridor segment, since ground-floor offices tend to reduce pedestrian activity on a business street.

**Public and Private Investment in Physical Improvements.** Metro should take a lead in implementing streetscaping and design improvements in the public rights-of-way throughout the corridor, with more intensive pedestrian-oriented improvements within the key nodes. However, urban design elements such as street signage, gateways, paving, public art, and lighting should be attuned to the specific marketing recommendations for different segments of the corridor, in order to strengthen the identity marketing concepts and destination potentials for those areas. Badly-needed improvements to business signage and buildings should be encouraged by Metro's Economic Development office through incentives to the private property owners and businesses, such as through dedicated loans and grants. A creative approach is recommended that engages local artists to help design unique signage for businesses (such as in coordination with the Metro Arts Commission and NAIBO), and for Metro Planning to provide technical assistance to businesses to help them develop concepts for improvements to their landscaping and building facades, once they receive low-interest loans or grants through Economic Development. Simple but effective improvements to signage and landscaping will make significant improvements to the overall physical environment in Nolensville Pike. Metro Government should encourage such improvements through "carrot and stick" approaches that include grants, loans, and technical assistance but also basic design standards and regulatory enforcement.

It is recommended that Metro Development and Housing Agency (MDHA) be directly involved in financing of public improvements to the Fairgrounds Green Gateway area, such as through the creation of a Tax Increment Financing (TIF) district, that helps to enhance the overall appearance and functionality of this broader area as an industrial and office-driven employment center. The market analysis found that the potential for the Fairgrounds Site for various uses is far greater if the physical environment is improved from I-440 through the "split" of 4<sup>th</sup> and 2<sup>nd</sup> avenues. Related to these improvements is the recommendation that both 4<sup>th</sup> and 2<sup>nd</sup> avenues be returned to two-way traffic status. Overall, a comprehensive transportation study is recommended that would consider design improvements to Nolensville Pike throughout the study area and beyond, in light of the market findings. Such improvements should consider the role that the road plays in different locations and potential market environments. Overall, there is a need to enhance the physical attractiveness of the road and increase its accessibility to pedestrians (particularly at key nodes) and to alternative forms of transit. The potential for streetcars or other forms of mass transit should be considered as part of this recommended study.

**Marketing and Management.** The study recommends that marketing and management of portions of the corridor be led by business organizations, such as NAIBO (Nashville Artisanal Industry Business Organization) for the northern section and a Nashville International Corridor Community Development Corporation (ICCDC), for the portion south of I-440. The Mayor's Office of Economic Development would assist in establishing these organizations, in coordination with businesses and property owners. The organizations would be sustained with grant funding and technical assistance (such as from the Metro Arts Commission or Community Development Block Grants), fundraising, annual events, and memberships. The ICCDC would gradually gain capacity for land assembly and redevelopment, which would also assist in revitalizing the corridor. The Mayor's Office of Economic Development, coupled with the Nashville Convention and Tourism Bureau, would develop a program for marketing the International Corridor, and Nashville Zoo area, and NAIBO for tourism as part of a broader tourism development program for the corridor. These areas, along with the Fairgrounds Gateway area, would be promoted as part of the convention package for the new Music City Center. Thus, there are many economic benefits that can accrue to the region from the revitalization of the Nolensville Pike corridor.

## **INTRODUCTION**

Commercial corridors are crucial to Nashville's overall economic and fiscal health for a number of reasons, and are also essential markets for community building and neighborhood stabilization. Nashville is perhaps more dependent on commercial corridors than some other cities because of the city's traditional "hub-and-spoke" system of highways or "pikes" that prioritizes a relatively fixed set of commuter routes. In cities with a grid pattern of streets and avenues, traffic and resulting commercial development can be more evenly distributed. Much of the city's commercial businesses are located along these corridors, even in up-and-coming commercial areas like 12South (12<sup>th</sup> Avenue South / Granny White Pike). As a result, the city's commercial business health rests to a large extent on the overall functionality and vibrancy of these corridors.

But the economic impact of these corridors extends far beyond commercial businesses, since the very image of the city is generated by the perceptions gained by people (including prospective corporate and site location specialists) driving along these corridors or visiting downtown. Further, the corridors themselves form what is essentially the "face" of the neighborhoods and communities adjoining them. So, when the corridor generates a negative image, then it reflects on the perceptions and ultimately the marketability of surrounding neighborhoods. The corridors have even more direct impacts on the parcels directly behind and adjoining them.

If commercial corridors are allowed to deteriorate, then the prime tenants leave and the rents and prices that commercial properties are able to achieve falls. The neighboring residential communities gradually become less desirable, and experience a similar negative impact on rents and sale prices. When prices



and income stream are suppressed, then values and tax revenues decrease. So, there is an impact on the fiscal health of the city. Nashville, like other cities in Tennessee, is dependent on both property and sales tax revenues, which can be greatly impacted by the poor performance of commercial corridors. Thus, it is in

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the city's interest to maximize the performance of these corridors through whatever means necessary, including not only regulatory "sticks" but also infrastructure investments, pro-active marketing, and various types of incentive "carrots" as appropriate, in order to leverage private investment and enhance tax revenues. Ultimately, the city should be able to measure the net economic and fiscal benefit of such infrastructure, marketing, or incentives just as it does with its Tax Increment Financing (TIF) districts.

### **Purpose of Study**

Nolensville Pike is one of Nashville's longest and best known commercial corridors, starting downtown as 4<sup>th</sup> Avenue South and marching southeast 25 miles to the town of Nolensville in Williamson County. As an older commercial corridor, Nolensville Pike shares many of the characteristics of similar corridors where the road and adjoining neighborhoods have developed over time with a mix of industrial, commercial, recreation, family entertainment, and residential uses; but lack cohesion and suffer from the effects of suburban sprawl and competition in the regional market. A disjointed and monotonous streetscape, low-quality and crowded retail use, traffic congestion, and poor physical conditions characterize portions of the Corridor.

And yet, there are a number of successful and growing businesses in the Corridor and the area has attracted a diverse, international community with a business mix that provides exceptional potential for identity marketing. Experience suggests that corridor revitalization is accelerated through the creation of identity marketing districts or nodes that celebrate the unique characteristics, institutions, or uses at key locations. Commercial revitalization often helps promote the marketing of housing in adjacent neighborhoods.

To address the needs of area residents and businesses, and to create a vision for future revitalization, Metro Nashville has developed a thoughtful and comprehensive *South Nashville Community Plan* and a more detailed *Nolensville Pike Corridor Detailed Neighborhood Design Plan (DNDP)*, which focused on the corridor between I-440 and Grassmere. Both plans were informed by extensive community input. The latter provided detailed policy guidelines and building standards for individual sub-districts within the corridor. Since completion of these plans however, Metro has observed correctly that in order to encourage the implementation of this Plan and leverage revitalization, there is a need to examine the economic viability of the concepts and land uses proposed in the Plan (as well as the general financial feasibility of recommended uses and form, in the market context). There is also the need to determine the market potential of the Corridor and to identify viable redevelopment opportunities that may add value to and reinforce the community's vision. Finally, there is the need for a strategic plan for marketing, development, financing, and management that can help guide revitalization. This Market Analysis provides input on all of these elements.



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The Study Area for the Market Analysis was extended to include the 4<sup>th</sup> Avenue South / Nolensville Pike corridor from the I-65 Inner Loop south to I-440 and through to Grassmere. Thus, the study area is twice as long as that examined in the DNDP. The Market Analysis aims to provide an understanding of the economic potentials for various uses throughout this study area and to help guide zoning and land use policy and to provide a basis for strategic interventions. The market for four primary uses was forecasted, namely industrial, office, residential, and retail. In addition, an “opportunities assessment” was conducted to identify opportunities for development of other uses, although the demand for those uses was not forecasted. The findings from this Market Analysis as well as the opportunities assessment, are summarized in Volume 1 of this report.

A Strategic Plan was also prepared based on the findings of the market analysis. The strategic plan recommends market-based concepts and specific projects for redevelopment and revitalization. These are the types of marketing concepts and project proposals that are often used to help inform community planning. Since they were prepared *after* the community plan was completed, there may be different approaches suggested that were either not considered during the community planning phase or were rejected or less informed by the market at that stage. Such concept and project recommendations are only meant as a guide for discussion on the way forward and would need to be integrated to help refine the community’s vision. *The recommendations are not meant to supplant or undermine the community’s vision but rather to provide an economic basis and input for policy development.* The recommendations are also meant to help guide *marketing and economic / business development* elements which may not have formed part of the community plan.

This Volume 1 Report recommends pro-active development and marketing strategies that go beyond the regulatory policies outlined in the Community Plan. Often, planning agencies will rely on one of the few tools available to them – zoning – to help guide future development. Others in local government will assume it will be enough to revitalize neighborhoods through regulatory policies that tend to be reactive. Unfortunately, yielding only a reactive “stick” does not always achieve the necessary ends nor *maximize* the economic potential and positive impacts. Revitalization and change more often occur through pro-active and strategic redevelopment, marketing, and incentive policies (i.e., “carrots”). Thus additional players in local government, wielding additional tools, are necessary to achieve revitalization of a corridor in collaboration with the community and the private sector.

The development and marketing strategies recommended in Volume 1 focus on segmenting the corridor into individual districts and nodes which have unique identities and therefore can leverage differentiated policy, marketing, and development approaches. Thus, land use, development, selected zoning/policy,

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and marketing (as well as financing, economic development, and management) approaches are recommended for three corridor segments, followed by a series of individual nodes and specific projects within these segments. Section 1 of Volume 1 provides a brief overview of best practices in corridor development as background for the recommendations. Section 2 provides the detailed marketing and development strategies for the corridor segments as well as individual districts, nodes, and projects. Based on the market analysis and strategic findings, key issues are discussed in Section 3 with respect to the economic “viability” of certain policies generated by the *South Nashville Community Plan* and more specifically, the *Nolensville Pike Corridor Detailed Neighborhood Design Plan (DNDP)*. Finally, Section 4 provides a summary of key strategies and also a pro-active Implementation Action Plan for moving forward.

A separate Volume 2 report provides the background detailed findings from the Market Analyses that were performed to forecast demand within the corridor and to provide a basis for the marketing and development strategies summarized here in Volume 1. The first part of Volume 2 (2A) summarizes findings from an Economic Overview assessment as well as the market analyses for industrial and office space. The second part of Volume 2 (2B) summarizes findings from the market analyses for residential and retail uses as well as an opportunities assessment for audience support uses.

## **Section 1. CASE STUDIES**

This section provides a summary of key findings from a review of relevant corridors completed in order to identify best practices for revitalization. The research focused on urban and suburban highway commercial corridors that share certain common characteristics with Nolensville Pike and have been successfully redeveloped or revitalized. Research and consultant experience have identified many corridor plans, but only recently have some of these plans been implemented and begun to yield tangible results.

### **“Maryland’s International Corridor”** *Montgomery County, Maryland*

The International Corridor is a commercial strip located along University Boulevard in Washington’s suburban Montgomery County, from New Hampshire Avenue to West Park Drive. Like Nolensville Pike, this corridor has a diverse multi-cultural and international flavor with businesses marketing to people from West Africa, Asia, the Caribbean, and South America. This multi-ethnicity is reflected in the shops, restaurants, nightclubs, and grocery stores located here. Use of the international character of the corridor as a marketing tool is particularly relevant and offers a model for Nolensville Pike, which shares University Boulevard’s international flavor.

The revitalization process in University Boulevard has been driven by Maryland’s International Corridor Community Development Corporation. This non-profit CDC has board membership comprised of area businesses, organizations, government agencies, and employees.

Redevelopment and revitalization efforts differ from section to section along University Boulevard, but the overall objectives are centered on the fusion of the commercial corridor through marketing efforts and on neighborhood revitalization. At Carroll Avenue and University Boulevard East, plans are to develop a mixed-use node. The existing commercial activity in the area will be retained, but streetscape design will be upgraded.

Providing and improving pedestrian access and connectivity to University Boulevard East was a major priority for County Government. This was achieved through upgrading of sidewalks and ramps. Other initiatives included the provision of workforce and affordable housing units in University Boulevard East through redevelopment of older housing stock. Some private sector initiatives include efforts by developer Stavrou & Associates to redevelop housing for low-income households and senior citizens.

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Companies located in the area encompassing Langley Park along University Boulevard are entitled to State income tax credits, local real property tax credits, and accelerated County permitting processes. Thus, the County and State Governments have participated pro-actively through direct infrastructure investments, by encouraging private redevelopment of key sites, and through establishment of incentive policies. Pro-active marketing, incentives, and policies like those used in University Boulevard provide a model for revitalization and redevelopment in Nolensville Pike.

### **5<sup>th</sup> Street Corridor (El Centro de Oro)** *Philadelphia, Pennsylvania*



The 5<sup>th</sup> Street Commercial Corridor is located in north Philadelphia. The area is well-recognized as the center of Philadelphia's Hispanic community and the region's business, cultural, and social hub. El Centro de Oro (the Spanish name selected as a theme to promote the district's unique characteristics) is home to the region's largest concentration of Latino-owned businesses. As such, the corridor

shares much in common with Nashville's Nolensville Pike, which also serves as a business hub for the Latino community.

Revitalization efforts within the corridor have been led by the Hispanic Association of Contractors and Enterprises (HACE) since 1997, with funding from Local Initiatives Support Corporation, local government, Main Street, and other agencies. HACE is a community economic development corporation (CDC).

HACE has developed 20,000 square feet of retail/office space along the corridor, with another 25,000 square feet in La Plaza currently under development. HACE has also created a number of economic development initiatives relating to economic development, affordable housing, and support services as well as commercial revitalization. HACE has also implemented its own infrastructure maintenance program, coordinates media coverage of the district, and implements clean-up campaigns.

Now, HACE is working on "multi-cultural-based" design guidelines to visually identify and unify the entire business corridor (through physical improvements to buildings, sidewalks, lighting, and streets). The palm tree symbol is being integrated with utility poles and street signs. The group is providing pattern books for façade improvements, adding street furniture, evaluating signage, improving street lighting, and painting murals throughout the



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corridor using local skills. HACE is also working on business recruitment and marketing. The organization provides a model for revitalization efforts led by a community development organization with strong support and funding from local government sources.

### **Columbia Pike** *Arlington, Virginia*

Columbia Pike is a major highway corridor in northern Virginia. The road runs east from State Route 236 in Fairfax County to the Pentagon in Arlington. As with Nolensville Pike, Columbia Pike is the center of Arlington's immigrant population. This culturally-diverse community is represented through the shops and restaurants along this corridor.

The Columbia Pike initiative began in 1998 by the County Board, which sought to revitalize the busy road which had become a victim of disinvestment. The Columbia Pike Revitalization Organization was formed to complement the efforts of the Board and was comprised of community members, businesses and property owners.



A first objective was to enhance pedestrian access and to create a more walkable environment with less reliance on automobiles. In this respect, the effort shares much in common with policies set forth by the *South Nashville Community Plan* in its orientation towards creating a more urban, walkable street. The second objective was to develop mixed-use precincts which would include new office, retail and residential uses yet still retain the corridor's cultural diversity. These goals and objectives were articulated in a revitalization plan which spelled out the economic development objectives, land uses, zoning, urban design, transport and public infrastructure needs. The Columbia Pike initiative provided a somewhat more comprehensive guide for development than the *South Nashville Community Plan*, by integrating economic development and transport infrastructure improvements with the overall land use, zoning and design plan.

The revitalization process generated through this initiative is ongoing, with notable projects having been accomplished. There have been three significant mixed-use developments completed along this corridor, including Halsted, 55 Hundred, and Sienna Park. 55 Hundred is a 10-story building with 235 residential units and 7,544 square feet of retail. Sienna Park is a six-story redevelopment of a former Safeway store. It is a mixed-use project which comprises 14,603 square feet of office space, 32,604 square feet of retail space, and 188 residential units on a 205,546 square foot parcel. Penrose Square is a notable new development now under construction. On completion, it will have 97,000 square feet of retail and 299 residential apartments. Critically, for redevelopment of this scale to occur, various incentives have been given to developers along the

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Columbia Pike Corridor, including an expedited approvals process. Hence, Arlington County has (like the previous two examples) used incentives and proactive approaches for attracting redevelopment at targeted locations.

### **New Hampshire Avenue Corridor** *Takoma Park, Maryland*

The City of Takoma Park, Maryland has been coordinating public and private investment efforts for the redevelopment of New Hampshire Avenue, outside of Washington, DC. The project was initiated in August 2007 and is ongoing. A key feature is the roadway design, which is oriented to establishing a “multi-way boulevard.” The roadway design is, in fact, critical to the overall concept of creating more urban, pedestrian-friendly streets. Such objectives are not met through land use planning, zoning, and site design considerations alone, but also through effective roadway infrastructure design. The lessons learned from experiences like New Hampshire Avenue can help inform efforts to create a more pedestrian-friendly environment along Nolensville Pike.

In order to achieve a transformation from the type of environment that exists along New Hampshire Avenue into a pedestrian-friendly mixed use center, dramatic changes were needed. Simply installing sidewalks and planting street trees along the right of way was not considered sufficient. A more substantial approach was required to create a “complete street” that makes the area comfortable for motorists, transit patrons, pedestrians, and bicyclists. It required a significant policy and financial commitment on the part of Takoma Park and Montgomery County.

#### **Multi-way Boulevard**

The optimal approach recommended by the consultant for this project was to convert New Hampshire Avenue into a “multi-way boulevard”.<sup>1</sup> A multi-way boulevard uses an access management technique to separate through traffic and local traffic into auto-oriented and pedestrian-oriented zones. With this concept, through traffic stays in the center lanes, usually two travel lanes in each direction, which are separated by side medians that are planted with trees and other landscaping. The side medians are also used to place attractive transit waiting areas with shelters, lighting, seating, and landscaping. The side medians can be designed to provide bus pull-offs beyond the intersection. Signal pre-emption technology can be used effectively and inexpensively to ensure that buses are able to pull back into the travel land unimpeded.<sup>2</sup>

It was recommended that travel lanes be as narrow as possible to encourage slower speeds through the area. On the outside of these side medians are side lanes that include one local travel lane and a parking lane for

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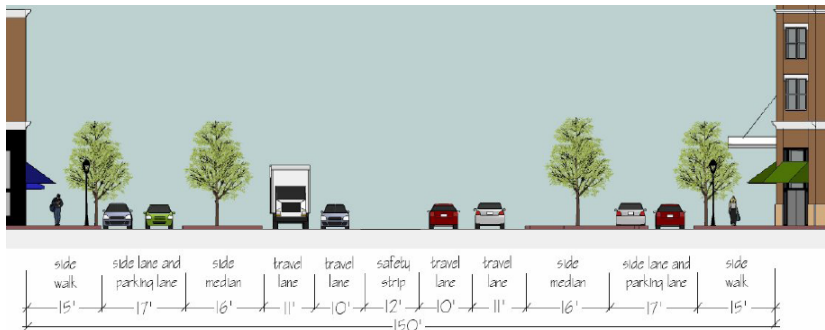
<sup>1</sup> TND Planning Group, *New Hampshire Avenue Concept Plan*, prepared for City of Takoma Park, 2008.

<sup>2</sup> Ibid.

## Nolensville Pike Market Analysis

accessing businesses and mixed-use buildings. Bicyclists will typically share the local travel lane with cars and the lane can be marked with a shared-use lane or “sharrow” symbol.

A multi-way boulevard can be designed to limit access to local side streets, and to provide turn lanes at major intersections where turns are desired. The center of a multi-way boulevard is typically a “safety strip” which is a flush median with a textured paving material such as brick or a brick-like composite. This allows for separation of oncoming traffic and turn into turn lanes in advance of intersections.



*Boulevard Sectional Showing Travel Lanes, Pedestrian Access and Landscape*  
Source: **TND Planning Group**

Beyond the parking lane there is a pedestrian friendly streetscape that includes wide sidewalks, street trees, pedestrian scale lighting, and other street furniture. Pedestrian friendly buildings of appropriate scale and form are built directly up to the back of the sidewalk. Enhanced crosswalks and pedestrian signals are also used to increase driver awareness and pedestrian comfort and safety. The figure above illustrates the multi-way boulevard concept:



*Image Source: TND Planning Group*

Additional right of way than currently exists would be required to implement this concept. It was considered difficult for the State to commit all the resources to acquiring the necessary right-of-way for a project such as this in the near or mid-term. Therefore, an innovative strategy was required to work with property owners through public-private partnerships that demonstrate the benefits of, and create



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## ***Nolensville Pike Market Analysis***

incentives for, redeveloping frontages in a manner consistent with the concept. Through the use of public-private partnerships, the overall cost of such projects to the public sector can be reduced and would therefore become more feasible (at least in the long-term). The multi-way boulevard was seen as a design solution that would effectively provide improved access management, traffic calming, adequate traffic capacity, a walkable streetscape environment, attractive transit waiting areas, and a framework for creating mixed-use, pedestrian-friendly development.

The images above show perspective views of the multi-way boulevard concept for the New Hampshire Avenue corridor. A 2007 master plan for Fairfax Boulevard in Fairfax City also utilized this concept. In both cases, the existing development pattern and roadway characteristics are similar. It was determined that this concept could be achieved by a partnership between the County, State DOT, and property owners who could realize economic benefits of redeveloping their properties while providing the additional right of way or necessary improvements along their frontage to complete the boulevard.

Until the concept is fully realized, Takoma Park has moved forward with interim measures. Among these are bus stop upgrades, providing pads and seating walls at bus stops to make utilization of public transport as comfortable as possible for patrons. Commercial properties along New Avenue were given façade improvements a grant awarded by the State of Maryland. One of the objectives of the redevelopment is to enhance public spaces along the corridor. Residents have been active in planting of trees and flowers along New Hampshire Avenue. The City also has various incentives for companies who wish to undertake redevelopment projects in New Hampshire Avenue. These incentives include employment and tax credits as well as other waivers and exemptions if the company is able to demonstrate job creation and property improvements. So again, the best practice examples point to the use of proactive incentives to assist in effecting change within the corridor.

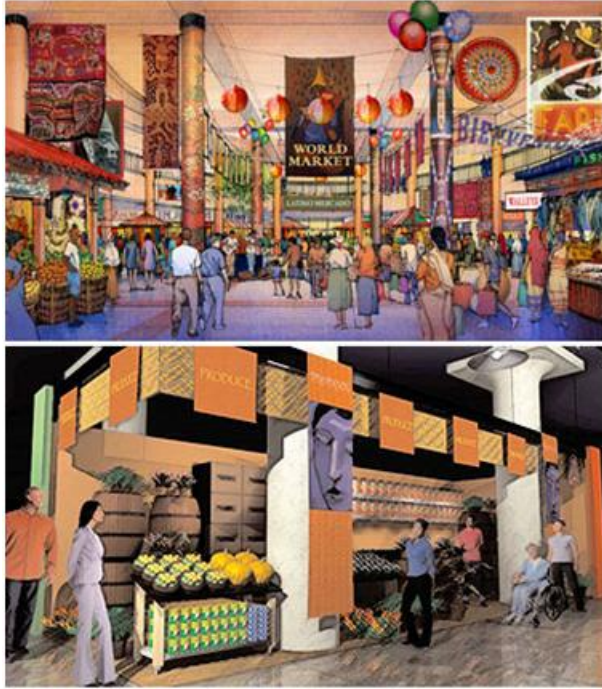
### **East Lake Street**

#### ***Minneapolis, Minnesota***

Large institutions including hospitals and banks help anchor the East Lake Street corridor, but the area had still suffered from crime and neglect. These institutions and others came together to form the Phillips Partnership to work on making the neighborhood safer and more appealing. But perhaps more important has been small business training and capacity building, micro-enterprise lending, and development of business incubators by the non-profit Neighborhood Development Center (NDC) that has helped revitalize the corridor. Entrepreneurial immigrant businesses have created street level vitality using the training they received from the center. The effort is relevant to Nolensville Pike because of the focus on strengthening immigrant entrepreneurship as part of the



## ***Nolensville Pike Market Analysis***



commercial revitalization of the neighborhood. This effort built on the community development corporation model to ensure that implementation was led by an organization dedicated to the purpose of revitalization.

With the center's sponsor (a bank) to assist, derelict buildings have been converted into a Latino merchandise market with multiple vendors and shops that have created a regional destination. Another formerly vacant building was converted to retail and commercial office as Plaza Verde. NDC has also helped open the Midtown Global Market, a 62-stall food emporium that draws on the

diverse culture of the area in restaurants and food stalls that create another regional destination. The City of Minneapolis has a 25% commercial corridor/node loan program that has been utilized by many of the small businesses and is credited to helping the businesses get their feet on the ground.

### **Great Streets Program *Washington, DC***

Washington's Great Streets Program is a comprehensive effort to use infrastructure investments, streetscape and urban design improvements, planning, and economic development assistance to leverage private investment to improve economic conditions, quality of life and physical environments in the city's commercial corridors. The program focuses on the entire length of six different commercial corridors in the city, with a total of 22 miles of roadway passing through 50 different neighborhoods. All are important gateways, but not already premier streets, with heavy commuter traffic. Ultimately an objective is to change public and market perceptions of the corridors as well as the communities that border these roadways.



## **Summary**

Great Streets and the other programs offer several models that are effective for leveraging revitalization and creating the environment sought by the community in a highway corridor like Nolensville Pike. First, all of these programs operate in an environment where local government has established targeted incentives to help enhance the overall attractiveness of the area for investment. Second, local governments have helped to fund non-profit organizations and community development corporations that have then taken a lead role in revitalization and neighborhood economic development. Third, many of these efforts focused on marketing to the strengths of the corridor, in this case, the international character. Finally, many recognized that creating pedestrian-oriented urban environments must incorporate comprehensive roadway design, beyond what can be achieved through zoning, site design, and land use tools.

## **Section 2. MARKETING & DEVELOPMENT STRATEGIES**

This section provides concepts and strategies for marketing, development, land use/zoning, and funding. The market analysis indicated demand for various uses along the corridor and at specific locations. The following strategies define specific marketing concepts along the corridor as drivers for redevelopment and revitalization. For example, it is proposed that the corridor be disaggregated for marketing purposes into three primary segments – NAIBO (Nashville Artisan Industry Business Organization), Fairgrounds Green Gateway, and the International Corridor. Then, each of these segments is further disaggregated into districts and nodes. Marketing, development, management, financing, and policy strategies are defined for each of these segments, districts, and nodes.

A sample rendering has been prepared for this section to illustrate one of the proposed concepts more effectively. It should be emphasized that these concepts were derived directly from the market analyses, as well as from experience with corridors nationwide. They may or may not be exactly consistent with community perceptions but where there is clear direction, an attempt was made to integrate community input from the *South Nashville Community Plan*. Ultimately however, these strategies are driven by the economic considerations underlying development in the area.

### **Marketing Concepts & Segmentation**

Urban commercial corridors and districts must compete with a growing inventory of sprawling suburban commercial nodes throughout the region. The inner-city markets on which they depend are constantly in flux and typically suffer from an exodus of income. As a result, many urban commercial corridors, and urban commercial nodes in general, experience high degrees of sales “leakage” to suburban retailers. Without pro-active marketing and constant maintenance, corridors tend to lose their competitive advantages, key anchors, and the higher rent-paying tenants.

Based on the experience of urban commercial corridors and districts nationwide, it has become clear that the opportunities for re-capturing leakage focuses on pro-active identity marketing, addressing basic “crime and grime” issues, establishing relevant design standards, and delivering key infrastructure improvements and incentives that help to leverage private reinvestment. The purpose of “identity” marketing is to focus on the unique identity for the area in order to capture more pass through and **destination** consumer traffic.

Creating a destination helps to attract consumers from outside of the primary market area (such as suburbanites, pass-through commuters, and

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## ***Nolensville Pike Market Analysis***

tourists) who would not have otherwise come to the area to shop. Destination districts do not have to be anchored by large stores or “big box” development, which is equated by some with destination retail. Instead, identity marketing typically focuses on the unique qualities of small businesses and the agglomeration effect of similar types of businesses or businesses serving a unique market base or providing a unique product.

An identity (which can but doesn’t always include a theme) is not “created” but is rediscovered within the unique qualities inherent in the district’s location, history and community heritage, natural environment, or business mix specifically. Many commercial districts are so diverse that defining one individual “theme” is not as important as finding the “essence” of the place for marketing purposes. For example, where the defining characteristic of businesses in a district is of mainly small, independent, family-run operations, the marketing strategies are derived from the unique strengths of this characteristic, such as personalized service and store loyalty.

Establishing boundaries and creating a business district for marketing purposes will also help to generate broader economic and financial benefits to the businesses. For example, a corridor-wide marketing effort will provide the power of marketing to businesses that may not have been able to afford any significant marketing on their own. Basically, there is an economy of scale that reduces the marginal cost for marketing of each business. This does not replace the need for many businesses to conduct their own marketing and consumer outreach, but it does help establish the destination effect that brings the shopper to the area as a start. Then it’s up to the individual business to capture those consumers once they are within the district. Such economies of scale extend beyond marketing to include safety and security, cleaning, capital improvements, event management, and other benefits, especially where a Business Improvement District (BID) is created with funds for such mutually beneficial activities.

Corridors are more complex than the typical commercial district, because they are often comprised of many segments that serve somewhat different markets. Nolensville Pike is somewhat different in this respect, in that many of the businesses along this very long corridor (extending south beyond the study area boundary) share a surprising number of characteristics including retail categories (e.g., automotive dealers), primary markets (foreign-born residents), design factors (strip suburban retail, multiple curb cuts), and size (generally below 5,000 square feet). Northern and western portions of the study area are characterized by industrial use, but there is still an advantage in certain cases of developing identity marketing concepts for this segment as a separate entity.

The overall corridor has been disaggregated into three primary marketing segments. The *Nashville Artisan Industrial Business Organization Area (NAIBO)* forms the northern marketing segment of the study area, extending from the I-65



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## ***Nolensville Pike Market Analysis***

Inner Loop roughly to the Fairgrounds Site (which forms its own node). The *Fairgrounds Green Gateway* segment extends from the Fairgrounds site to I-440. Finally, the *International Corridor* marketing segment extends from the Fairgrounds Site beyond the southern boundary of the study area to Harding Place.

### ***Map of Proposed Corridor Marketing Segments***



Map Source: Metro Nashville Planning Department

### **Districts, Nodes, and Projects**

Each of these segments comprises several districts and/or nodes. Recommendations are made for development of specific segments, nodes, and project concepts that can help move forward the revitalization of the Corridor. The overarching concept is to create a series of segments, comprising of districts and/or nodes along Nolensville Pike in order to break-up the sprawl effect, orient each portion of the corridor to its competitive strengths, and help create identities for destination marketing. The segments, as well as specific districts, nodes or projects are defined below, moving from north to south within the corridor study area. Several of the concepts for development of these districts, nodes, or projects are illustrated through images of comparable concepts. A concept site

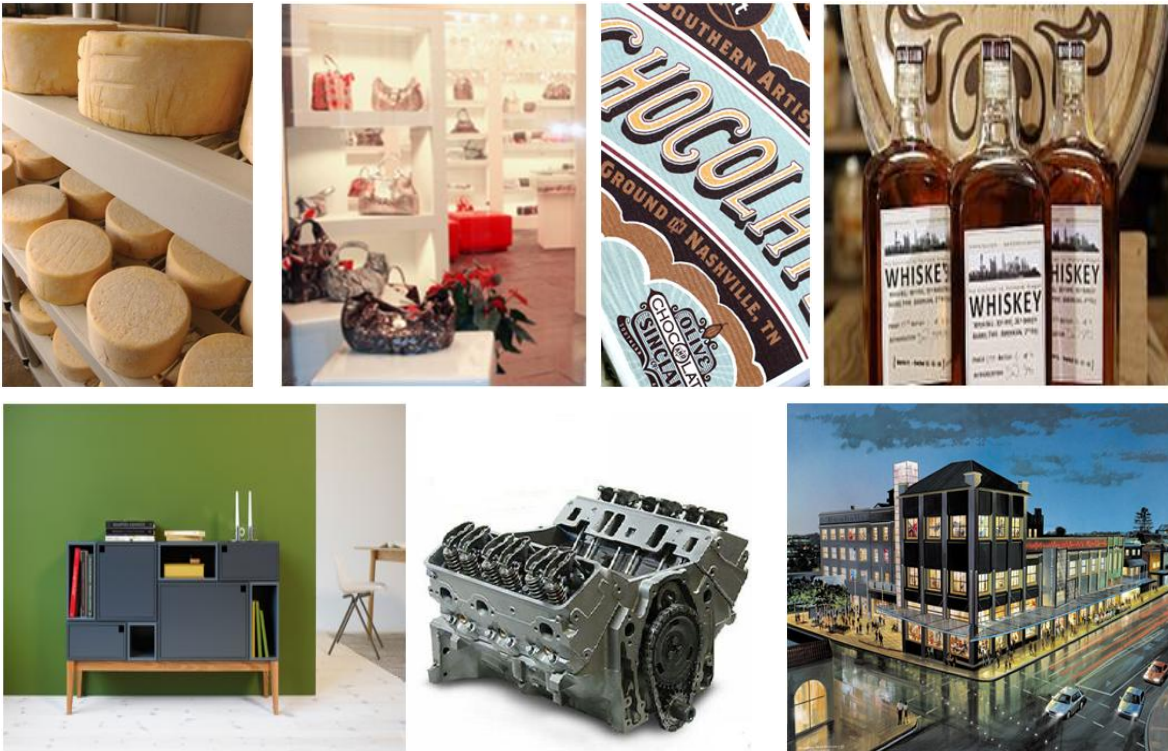
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## ***Nolensville Pike Market Analysis***

plan and rendered illustration has been created specifically for one of proposed districts, located around the intersection of Antioch Pike and Nolensville.

### **Segment 1: NAIBO** **Nashville Artisan Industrial Business Area**

Inner-ring (inside I-440) industrial areas include older industrial buildings and infill, often integrated with residential neighborhoods. In some cases, these industrial areas form the gateway to the corridor or to key communities and set the tone for development south of downtown Nashville. These areas have been and will continue to attract a somewhat different industrial tenant base than the outer ring (outside I-440) industrial areas. There is the opportunity to expand upon the “artisan” and “green” industrial business opportunities to establish a marketing concept (NAIBO) for industrial areas within this inner ring. Some of these concepts could also be extended into new office/mixed use areas such as the fairgrounds site, as described further in this section. *The concept is not to constrain or regulate out businesses but rather, to establish a marketing identity that can help encourage not only the development of a core set of industrial and service businesses that make good “neighbors” to residential neighborhoods but also to other businesses as the area’s image improves.*



*Images of sample artisanal industry products and districts<sup>3</sup>*

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<sup>3</sup> Image sources: Artisanal cheeses (Oregon State University); designer Italian fashion handbags (Gleni Boutique Products); Olive & Sinclair Hand-Ground Chocolates of Nashville; Artisanal whiskey (the Nines

### Overall Segment Strategies

The boundaries of this segment of the corridor are defined below, followed by overall strategies for streetscape, management, marketing and business recruitment, traffic planning, and program funding.

**Segment Boundaries.** As noted above, the marketing segment extends from the I-65 Inner Loop to the northern end of the Fairgrounds Site. The focus of this marketing segment would be the area located around 4<sup>th</sup> Avenue South and Chestnut Street and there are three separate but adjacent districts defined for



Map Source: Metro Nashville Planning Department

marketing and redevelopment purposes within the segment. Starting from the north, the 4<sup>th</sup> Avenue-Chestnut Mixed-Use District starts at I-65 and continues to Chestnut Street, integrating with the adjacent Chestnut Hill neighborhood. Continuing south, the Chestnut Square area surrounding the former May Hosiery Mill forms the primary node within this segment, but there are opportunities for expansion of the concept and better integration with surrounding industrial and residential neighborhoods. Finally, the Chestnut South District forms the southern portion of this marketing segment, ending at the Fairgrounds Site.

**Heritage and Streetscape.** Critical to overall concept for this segment is the focus on industrial heritage and use of historic or vintage industrial resources for business use as well as branding of the area. There are a number of older industrial buildings, most of which are successfully rehabilitated and utilized. Where there are others that remain un-rehabilitated, there is the need to ensure conservation and pro-active marketing. Some buildings that may not have

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Hotel, Portland OR); handmade furniture (Coolhunting); hand re-manufactured engine (Grooms Engine, Nashville); Fortitude Valley (Brisbane, Australia artisanal industry district).



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## ***Nolensville Pike Market Analysis***

historic value may also be incorporated where there is the opportunity for façade upgrades.

Streetscape improvements are very important here for providing definition for the area and linkages between the various disparate buildings, heritage resources, and neighborhoods. As with commercial areas, there is a need for signage and other tools for establishing boundaries and identity concept. Key elements would include:

- Gateways. Again, gateway treatments would help to define the area and provide an identity marketing tool. Gateways could logically be placed at three locations: just south of the I-65 Inner Loop overpass, at the Chestnut Street intersection, and at the 2<sup>nd</sup> Avenue / 4<sup>th</sup> Avenue split. The gateways would logically focus on industrial artisanal heritage.
- Signage. The primary signage elements would include the following:
  - Directional signage on 4<sup>th</sup> Avenue South from the convention center and downtown, on Lafayette Street, the I-65 Inner Loop, and from I-440.
  - Street signage with a consistent format that echoes the industrial heritage of the area.
  - Business signage that again focuses on the industrial artisanal heritage brand.
- Industrial Artscape. Because of the artisanal nature of the segment concept, there is an opportunity to explore the use of public art that expresses an industrial character. Active use of public art and murals relating to the industrial heritage of the area would help solidify the concept.

**Management Strategy.** Formation of a Nashville Artisanal Industry Business Organization (NAIBO) should be encouraged to help focus on various business issues, interface with Metro and residential communities, and promote artisanal products and industrial businesses. Products and services provided by businesses located within the concept area (and affiliated artisanal products from other businesses in Nashville) could obtain official Nashville Artisanal Industry Business Organization (NAIBO) status to create and achieve a certain level of recognition. NAIBO would develop the requirements for NAIBO status and membership. Business attraction and retention would also be a focus of the NAIBO, in coordination with the Mayor's office for Economic Development. The NAIBO would be structured to include a board with representatives of area artisanal and other industrial businesses, community organizations, property



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## ***Nolensville Pike Market Analysis***

owners, Metro economic development staff, and financial institutions, among others. In sum, the organization would have responsibility for:

- Development of a business plan for the organization
- Communication with businesses and property owners, the media, surrounding residential communities (e.g., Chestnut Hill), and government agencies.
- Definition of official NAIBO status for branding purposes and membership. This would include the business and product typologies such as:
  - Hand-made products including furniture, home furnishings, toys & games, musical instruments, etc.
  - Small/Craft foods and beverages (e.g., local beers, coffees, candies, etc)
  - Environmentally-friendly products and services, such as spring water, organic or locally-grown and produced foods and beverages, natural construction materials, recycled products (see below), etc.
  - Recycled and refurbished products, such as machinery & equipment, floor and building products, etc.
  - Design services relating to architecture, web design, interior design, landscaping, etc.
- Marketing and promotion of the area, plus focused recruitment and entrepreneurial development of artisanal businesses (again with assistance from economic development staff).
- Linkages with financial assistance and business development programs, along with consulting on development issues important in all three districts within the area.

**Marketing & Recruitment.** Marketing would focus on the branding of the area and of local artisanal products. Branding could include:

- Labeling of products,
- Joint advertising,
- Promotions,
- Establishment of showrooms or a Design Center to showcase locally-made artisanal products, and
- Media coverage.

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Recruitment efforts would be focused on attracting other local/regional businesses and entrepreneurs that generate products consistent with the concept developed for the area.

**Business Development Programs.** Another focus of the area would be entrepreneurial business development. The NAIBO would assist or provide linkages to agencies for financial and business development assistance, but there could also be programs created specifically for the development of the craft and artisanal industrial sector. Such programs might be created under the auspices of the NAIBO in coordination with Metro economic development, but funded through foundation grants, contributory income, and corporate sources. Incentives might be provided, such as a property tax abatement or subsidized rent in operating space. This could also be accomplished through an incubator-type program oriented to artisanal industrial production.

**Traffic Planning.** Traffic from downtown is split between 2<sup>nd</sup> and 4<sup>th</sup> Avenues, with 2<sup>nd</sup> north-bound and 4<sup>th</sup> south-bound. There are good reasons to widen 4<sup>th</sup> Avenue South and promote both 2<sup>nd</sup> and 4<sup>th</sup> as two-way streets linking downtown into Nolensville Pike. With the gradual redevelopment and further development of the Fairgrounds Site and other nodes throughout the corridor, there will be increased destination traffic flow on 4<sup>th</sup> Avenue, resulting in a need for better traffic management and possible widening. Creating a broader, two-way avenue or boulevard will also enhance the marketing of sites along 4<sup>th</sup> Avenue south of downtown, including the Fairgrounds Site, and create more opportunities for consolidation of sites for land assembly to support redevelopment projects. 2<sup>nd</sup> Avenue could also become a more prominent street through the Chestnut neighborhood. Plus, the existing roadways have rail crossings and topographical issues that beg for solutions. In general, there is a need to examine long-term traffic flow, based on the land use forecasts generate by this and other reports, and to identify opportunities for distributing traffic through a grid system at key nodes. Further study is needed to examine street design, traffic flow and the need for widening

**Funding.** Funding for the NAIBO would be generated through memberships, contributions, and Metro community development block grants (CDBG) or other sources as appropriate. Programmatic funding such as an incubator could be generated through university or art & vocational school sponsorships and corporate contributions. Funding for showrooms or a design center would be generated through public-private partnerships or as a privately-financed real estate project with rental income stream.

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## Nolensville Pike Market Analysis

### Key Node: 4<sup>th</sup> Avenue-Chestnut Mixed-Use District

The northern segment of the corridor (between I-65 Inner Loop) and Chestnut Street) has an agglomeration of small industrial service, building supply, contractors, auto service, and other businesses generally operating out of attached 3,000 to 5,000 square-foot units. The area is relatively busy and generates substantial traffic (small trucks, delivery vehicles, customer autos). The area remains somewhat competitive for certain types of industrial uses because of its central location, downtown accessibility, and regional access provided by I-65. Chestnut Street connects west to Edgehill Avenue, which links this area to Vanderbilt. Parking areas are somewhat narrow, which limits businesses' ability to expand. The City Cemetery is located directly across the street, which constrains development but also provides excellent opportunities for heritage tourism. There is also some adjacent industrial business as well as the ongoing revitalization of housing within the Chestnut Hill (formerly Cameron Trimble) neighborhood.



Map source: Metro Planning Department.

There is a clear opportunity to improve the overall functionality of this area not only for small industrial uses but also as a mixed-use district in order to create synergies with the revitalization of Chestnut Hill and a gateway from downtown into the exciting Nolensville Pike Corridor. Such improvement will require selective redevelopment, consolidation, and realignment of buildings and sites along this three-block stretch. Nodal concepts are detailed below.

- **Redevelopment Approach.** Further assessment is needed to determine whether the building design, functionality, and parking situation in this area is in need of drastic change or if there are more modest approaches to upgrading. Based on an assessment of general marketability and functionality, it would appear that there are feasible approaches to retain good building stock while redeveloping and consolidating sites and buildings to improve their viability. Such a “patchwork” approach may be more time consuming but will also help create a more interesting, viable and diverse industrial/commercial district. The proposed Nashville Artisanal Industry Business Organization (NAIBO – described above) could intervene and work with property owners, brokers, and the Metro Planning and Public Works Departments on physical redevelopment /

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## ***Nolensville Pike Market Analysis***

reconfiguration in this area. Planning would also encourage more effective integration and interface with the City Cemetery and adjacent Chestnut Hill residential uses.

- **Heritage.** Use of historic structures for branding. For example, an old storage tank provides an excellent opportunity for advertising the area's artisanal character. Rehabilitation and use of the structure in a creative, "funky" way can draw attention to the area and become a visitor attraction in itself.



- **Business Mix and Land Use.**

Small artisanal industrial businesses should be encouraged to locate within this district, integrated with existing industrial/services, contractors, and potential neighborhood-serving retail uses. A concept is suggested for this area that would focus on a patchwork of site redevelopment opportunities.



There are currently six vacant buildings in this area with a total of about 26,500 square feet. NAIBO would have responsibility for recruitment of targeted businesses to such sites. The recommended business mix would include artisanal businesses as defined elsewhere in this report, plus a small artisanal food store/caterer and an art house café/coffeehouse. Existing businesses classified as "artisanal" or supply/support to this industry should be encouraged to stay and expand.<sup>4</sup> These include the following:

- Letter Press
- Mid-Tenn Rubber Stamp
- Vital Signs Screen Printing & Embroidery
- Italia Granite Showroom
- Alfresco Pasta
- Crystal Springs Water
- Architect's offices, others

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<sup>4</sup> Image of neighborhood business street in Albany, California.



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## ***Nolensville Pike Market Analysis***

- **Policy of “Carrots and Sticks.”** There is a variety of carrot (incentives) and stick (regulatory) approaches to encourage the reconfiguration and redevelopment of buildings in this area as described below.
  - **Parking Regulation.** There is an apparent need for reconfiguration of sites to allow for more and better organized parking. At present, parking is front-loaded into relatively shallow lots, but with redevelopment and consolidation of parcels, there may be opportunities for shared parking. Since many of the buildings house industrial, rather than commercial, businesses that do not require visible front parking, zoning and parking regulations should discourage front-loaded parking on these sites.
  - **Redevelopment Incentives.** Encourage redevelopment through tax incentives/abatements that favor the reconfiguration of parking to the back of the building. For example, Metro Government could offer a five or ten-year property tax abatement for redevelopment projects within this designated district that meet key criteria for economic development and the urban environment.
- **Economic Development / Incubator Project.** There is the opportunity to establish an Artisanal Industry Business Incubator with city-wide implications for growing small businesses. This location or nearby is appropriate for such use, which could have university or vocational college/State grant funding or sponsorship. Not far from this site is Trevecca Nazarene University, and the broader university community in west Nashville is also quite accessible. Several of these institutions may have an interest in participating in this type of project. That level of interest can be tested further. The incubator might operate out of existing vacant space or provide an opportunity for pro-active redevelopment and infill.

### **Key Node: Chestnut Square Artisan Industrial District**

May Hosiery Mill and other historic buildings around Chestnut and Houston Streets near Fort Negley are already emerging as the hub of an eclectic “artisan industrial district,” with a mix of craft industrial, professional design office, and non-profit uses. Older buildings near the intersection of Chestnut and 4<sup>th</sup> Avenue South contain artisan industrial uses such as restored wood flooring and hand-crafted furniture. There is the opportunity to define, establish, and pro-actively market this district as the primary node for the artisan



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## ***Nolensville Pike Market Analysis***

industrial area and to create better synergies and linkages with both Fort Negley and the Chestnut Hill community. Key elements of this concept are as follows:

- **Visibility.** Raise the visibility of this existing node as the historic hub of the larger artisan industrial area through the marketing efforts described for the NAIBO.
- **Expansion.** Expand the node to include other existing historic buildings and industrial complexes that provide space for artisan industrial businesses.
  - Increase the vibrancy of the area through the introduction of more open showrooms, galleries, classrooms, anchor projects (see below) and small-scale commercial/industrial activity (e.g., bakery/coffee shop).
  - Anchor projects would include an artisanal business incubator (if not located in the Chestnut Mixed-use District) and a product showroom or design center. The showroom might be developed by private individuals or through a cooperative effort by NAIBO members to rehabilitate and use an existing historic structure (see storage facilities in Mixed-use District). Historic designation of such structures would help investors leverage federal historic tax credits and draw down the cost of rehabilitation.

### **Key Node: Chestnut South**

The three-block area located on the west side of 4<sup>th</sup> Avenue South between the CSX Railroad and the Fairgrounds Site is perhaps the most challenging in the corridor in terms of defining the highest and best market uses. Certainly the east side of 4<sup>th</sup> Avenue through Hart Street has a cluster of larger



industrial parcels that have retained substantial industrial activity. The triangle formed by 4<sup>th</sup> Avenue, Hart Street and the creek is identified later in this section as the “Hart Street Industrial Triangle.” This triangle actually forms part of a much larger industrial area further east along Factory Street, Industry Street, etc. Many of the industries in this area have had sufficient land to expand over time and create marketable industrial sites. By comparison, the west side of the street has

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## Nolensville Pike Market Analysis

small parcels with a mix of uses hugging hilly terrain and residential neighborhoods, where 4<sup>th</sup> Avenue snakes its way south toward the Fairgrounds Site.<sup>5</sup>



Existing uses in this area include sign printing, auto sales, ethnic convenience stores, industrial plating, pub, cafe, mosque & affiliated youth center, automotive maintenance and service, used car

dealers, plumbing and other contractors, churches, door/window businesses, and others. Because the parcels are small and parking is limited, there are sometimes overflow parking issues that impact on neighboring industrial businesses. Because of its hilly topography and collection of small industrial service uses, the area has a “backwoods” feel that somehow undermines its location within sight of downtown. If anything, the topography is supportive of residential uses offering dramatic views rather than industrial service, auto repair and other second-tier uses. Ultimately, this area is not marketable for large-scale commercial or industrial development but may be appropriate for residential, community, and small-scale office uses as a transition zone between NAIBO areas and the Fairgrounds Site.

- **Alternative Redevelopment and Land Use Approaches.** One approach for this area would be to encourage “*upgrading*” of low-rise residential and low-impact office and community uses that are compatible with the neighboring South Nashville residential neighborhood and have minimum impact on industrial companies. Parcels would gradually be consolidated to improve overall efficiencies and marketability. Non-automotive commercial and service uses would be concentrated at the intersection of Nolensville Pike with Ensley Boulevard and Moore Avenue.

An alternative would be to create a small *office/service district* within the triangular area bounded by 4<sup>th</sup> Avenue, Rains Avenue, and Moore Avenue or Wingrove Street. This would allow for the gradual conversion and consolidation of parcels towards the interior of the block to small office/service uses (e.g., small contractors), houses of worship, and community functions. Both alternatives would allow more space for parking and circulation. Given the need to capture office and industrial market demand at key locations, the former is preferable to the latter.

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<sup>5</sup> Chestnut South images sourced from Portland Architecture blog, RGDE, and Council of American-Islamic Relations.

- **Attractive Commercial/Service Use at “The Split.”** The intersection of 2<sup>nd</sup> (Ensley Boulevard) and 4<sup>th</sup> Avenues, known as “the split,” should be perceived as an important gateway for both the Artisan Industrial Area (NAIBO) and the Fairgrounds Green. This intersection has been surrounded by container stacking, mobile homes, construction trailers, used car lots, several contractors and a youth center. The area is prone to flooding, which caused severe damage to the mobile home park during the May 2010 floods. In the short term, or until that time when traffic patterns are changed, this area should be upgraded as a gateway to these two segments of the corridor. Upgrading would include design improvements such as landscaping and signage, flood mitigation, and redevelopment or reconfiguration of existing uses. Recommended approaches for this are provided below.
  - Redevelopment of certain properties can be encouraged through positive incentives and negotiation coupled with regulatory tools as noted below. Certain uses, such as used car lots, are already over-populated within the core commercial corridor south of I-440. There is an over-supply of these uses within the market and throughout the corridor. Where there is only one or a handful of such uses, there is the opportunity to engage the owner along with developers or investors pro-actively in a planning effort that allows them an opportunity for equity participation in a redevelopment project, a buy-out, or a parcel swap with Metro at another location. At this location, such redevelopment might include a small mixed-use commercial center with contractor services and neighborhood-serving convenience retail use, coupled with a new community youth center (al-Farouq).
  - Urban design and traffic improvements could also help leverage redevelopment in this area. Widening of 4<sup>th</sup> Avenue South, if warranted through further study, or creation of traffic circles or other traffic improvements would help to create sites for redevelopment at this gateway. Urban design improvements at this site, such as gateway signage (as noted before), special lighting fixtures, and the beginning of a boulevard context with landscaped median would also help leverage change at this site by creating new parcel dynamics and opening those sites for redevelopment in anticipation of redevelopment of the Fairgrounds Site.
- **“Carrots and Sticks” Policy Tools.** The *South Nashville Community Plan* established a mixed-use (Neighborhood Urban) land use policy for this area. Within that context, zoning should focus this area on residential, office, and community uses, but automotive uses should be excluded and non-automotive commercial use should be concentrated at the Moore Avenue/Ensley Boulevard, and Nolensville Pike intersection. This area



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## ***Nolensville Pike Market Analysis***

should be targeted for regulatory enforcement and use of policy tools to ensure that service uses remain compatible with adjacent residential. As noted before, a negotiated redevelopment approach or implementation of traffic and urban design improvements can also work to engage with property owners and effect change.

- **Funding Approach.** A public-private partnership would be warranted in this area as an approach for redevelopment and the creation of gateways for the Fairgrounds Site. In order to maximize the long-term value of the site, it will be important for Metro to invest in creating the environment for attracting and retaining business. Public investments may include roadway and urban design improvements, but there is also the opportunity for Metro to work with private developers where public land and infrastructure can be used to leverage private development. The creation of a partnership or redevelopment authority for the Fairgrounds Site and surrounding districts may be appropriate for carrying out public improvements and leveraging private investment.
- **Hart Street Industrial Triangle.** As noted above, there is an existing industrial zone on the east side of 4<sup>th</sup> Avenue, which is bounded roughly by 4<sup>th</sup> Avenue/Nolensville Pike (west), Woodycrest Avenue (south), and



the railroad (east). Several large businesses, such as Grooms Engine have recently located here (along with Dyke industries nearby). There is also new construction underway. This industrial zone, which continues east into the Fessler's Lane area, benefitted early from the presence of the railroads and then from its highway-accessible location, with I-65 (Inner Loop) not far to the north, I-440 to the south, I-24 to the east and I-65 South to the west. This area is not well-defined as an industrial node but could easily be delineated and marketed as such, given its central location. Again, a physical constraint is topography, which presents steep grades for trucking as well as lower-set flood-prone areas. It is recommended that the economic development department work with planning and the industrial business owners on simple but effective management approaches. Signage is recommended to define this area as industrial nodes.<sup>6</sup>

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<sup>6</sup> Hart Street Triangle images sourced from Business Centers, Inc. and Vincal Life Sciences.

**Segment 2: Fairgrounds Green Gateway**

The second primary segment extends from the Fairgrounds Site to I-440. This segment is oriented to creating a gateway to the proposed Fairgrounds redevelopment site from I-440, which is likely to be a primary travel route to the site. The designation of this segment as a gateway for the fairgrounds grows out of several concerns. First, in order for the Fairgrounds Site to maximize its potential for attracting businesses and residents, it must be placed in the context of an attractive surrounding physical environment. There are no doubt companies that have expressed an interest in locating at the site regardless of any physical improvements, but long-term potential and value will be maximized with an attractive site.

Second, regardless of the use of the Fairgrounds Site, this area lacks definition in terms of land use and a marketing identity. While the area is predominately industrial, there is also a “hodgepodge” of other old and new uses, vacant and undevelopable sites that gives an impression of chaos. Ultimately the area appears under-developed and unattractive for many uses. Third, there are businesses within this segment that have benefitted from activity at the

Fairgrounds who may be impacted by the eventual closure and relocation of certain uses to another location in the city. By focusing on creating amenity value and a gateway from I-440, there are opportunities created for better definition and more intense and/or higher uses. Finally, the area retains a competitive edge for industrial and office uses because of its excellent transportation access, with I-440, I-65, I-24, and I-40 located only minutes away; plus rail service and Radnor Yards, the Nashville International Airport, Downtown and Brentwood also close-by. Thus, there is the opportunity to enhance this Nolensville Pike-I-440 Area as a more substantial business node.



Map Source: Metro Nashville Planning Dept.

### **Overall Segment Strategies**

The boundaries of the Fairgrounds Green segment are described below, followed by a description of business park areas, and overall strategies for infrastructure improvements, streetscaping, commercial business and entertainment nodes, management, and project financing.

**Segment Boundaries.** The Fairgrounds Site and/or the CSX Railroad (Craighead Street) would form the northern edge of this segment, extending south to I-440 Parkway. There would be individual nodes in the form of formalized industrial parks within existing/extended industrial areas. These nodes would include the Rosedale Industrial Area and Interstate Boulevard / Fessler's Lane Business Park. There would also be two commercial nodes, located at the I-440 Interchange (I-440/Gateway Commercial Node) and at Polk Avenue. Such concepts may require re-visiting the role of the I-440 Overlay zoning at this location, given the opportunity for revitalization and enhancement of the physical environment.

**Designation of Industrial & Business Parks.** This segment will benefit from the formal designation of industrial and business parks, with proper definition, boundaries, management and marketing components. The specific strategies for designation of these parks and the policies that guide them are provided later in this section under the discussion of nodes.

**Roadway Infrastructure Improvements.** The question of whether traffic should split into a two-directional approach at 4<sup>th</sup> and 2<sup>nd</sup> Avenues is in large measure one of traffic management, as noted in reference to the previous segment. If this area is to develop as a proper business node, then there may be traffic impacts that will demonstrate the possible need for widening of 4<sup>th</sup> Avenue (north of the split) to handle two-way traffic. As noted earlier, widening may also leverage redevelopment of parcels just north of the Fairgrounds Site. There do appear to be other roadway issues along the stretch from the Fairgrounds site to I-440, not the least of which is the railroad crossing and its impact on traffic flow. This question must be addressed as part of any planning assessments completed for the Fairgrounds Site. Other roadway concepts such as the "University Row" idea proposed as a link from Wedgewood Avenue to Murfreesboro Pike<sup>7</sup> are also worthy of further, more detailed assessment.

**Streetscape Improvements.** As a gateway to downtown and the Fairgrounds Site from I-440, it is important to create an attractive environment that will help leverage business investment. The types of improvements made should be oriented to establishment of a broad, attractive and safe avenue. Several potential improvements are proposed for discussion below.

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<sup>7</sup> Urban Land Institute (Daniel Role Fellowship) study 2010.

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## ***Nolensville Pike Market Analysis***

- **Boulevard Treatments.** Five and seven-lane arterials like Nolensville Pike can be made more attractive through the integration of a center tree-lined median strip, so long as it is built to a high standard and is well-maintained. It is not envisioned that this area would develop as a pedestrian-oriented community business node, so a pedestrian orientation is less important than in other parts of the corridor. Nevertheless, pedestrian facilities should be improved especially to accommodate those who live and work in the area, including potentially those at the Fairgrounds Site.
- **Landscaping.** Median tree plantings can help soften the environment and should not dramatically interfere with truck and automobile traffic through the area if planned properly. There is no reason that industrial businesses must only operate in a harsh environment. However, every precaution should be taken to protect truck rights of way through this stretch.
- **Gateways.** There is an opportunity for branding of this area as an industrial and office business node through the use of attractive gateways, particularly at the off-ramp for I-440 and also on 4<sup>th</sup> Avenue at the 4<sup>th</sup>/2<sup>nd</sup> Avenue split. Gateway signage will also help promote the Fairgrounds Site by announcing the area as the Fairgrounds Green Gateway, as an example. Obviously, other names can be tested to determine the most effective.

**Commercial Business Nodes.** In addition to industrial businesses, the area has a “hodgepodge” of commercial and industrial service businesses (e.g., automotive & equipment repair, used car sales, ethnic groceries (InterAsian Market and Ramadan International Market), dollar stores, army surplus, fast food, lawn/garden, tattoo parlors, filling stations, etc). It is recommended that a combination of regulatory enforcement, incentives, hands-on negotiation, and redevelopment encourage the consolidation of these uses into proper commercial nodes and relocation where appropriate. Specific nodes would include the I-440 Interchange and the intersection of Nolensville Pike and Polk Avenue (east and west side of Nolensville Pike intersection). Uses such as hotel, where such opportunity exists, would also be integrated into the I-440 commercial node. There would also be retail/commercial uses integrated into the Fairgrounds Site. More detailed description of the commercial nodes and approaches to them is provided later in this section.

**Potential Sports/Entertainment Node.** An opportunity was also identified for a soccer stadium, family entertainment center, destination sporting goods store, and associated dining and retail. Ideally, such activity could be located at the Fairgrounds Site, but mixed-use development there is likely to be a higher and more valuable use. As a result, alternative locations for this opportunity are discussed below.



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## ***Nolensville Pike Market Analysis***

**Management Strategy.** It would be recommended that redevelopment of the Fairgrounds Site and the Fairgrounds Green Gateway area be managed by a dedicated redevelopment authority created with a sunset provision and oversight by the Metropolitan Housing and Development Agency (MDHA) as an alternative to direct Metro Government involvement. A dedicated authority will have the mission and authority to promote development, market the Fairgrounds Site (and redevelopment of surrounding areas), and implement infrastructure improvements throughout the area through a TIF (see below) in partnership with the MDHA. While MDHA has ultimate authority over the financing of infrastructure, a dedicated authority can raise a broader set of resources from the public and private sectors to promote redevelopment of the area.

Establishment of more “formal” industrial and business parks in this area will also enable opportunities for an ongoing management entity for the parks, in terms of primarily maintenance, security and marketing, which could be handled through a variety of structures (e.g., business improvement districts [BID], business associations, etc.), depending on the interests of business.

**Financing.** Funding for industrial park and commercial nodes is discussed later in this section. Roadway infrastructure and streetscape capital improvements might be funded through a Tax increment Financing (TIF) district anchored by the Fairgrounds Site but extending south to I-440, or through a combination of federal transportation (“T2”) grants and State grants perhaps tied to the traffic impacts associated with redevelopment of the Fairgrounds Site. Funding for marketing and staffing of the redevelopment authority would be leveraged through private / corporate participation.

### **Key Node: “Fairgrounds Green” Mixed-Use Node**

There is the opportunity to establish a new jewel in the corridor, a LEED-certified “green” office/mixed-use node at the Fairgrounds Site, generally consistent with what has been considered by Metro officials and the Fairgrounds Task Force. The overall developable area of this site may have been reduced somewhat by the re-definition of the flood plain boundary, but there is still presumed to be sufficient land for development and an opportunity to create amenity value through creative use of open space within the floodplain.

Ultimately the site is marketable for office and industrial uses because of its strategic central location near downtown and within the transportation network formed by I-65 Inner Loop, I-65 South, I-440, and I-24/40 East. Nolensville Pike provides direct and easy access downtown and to I-440 and outlying areas including Brentwood and other executive housing areas, located only minutes away. Because of its size, the site presents opportunities for creating a green field office campus and mixed-use development within an urban context. Given Metro’s concern over the lack of sites available for corporate relocations, the urgency of redevelopment at the Fairgrounds is understandable. There has

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## ***Nolensville Pike Market Analysis***

already been interest in this site for an office location. However, the site is unlikely to reach its full potential and maximize its value as a corporate business location so long as the surrounding physical environment and context is second-rate.



*Melrose Arch mixed-use business node, Johannesburg, South Africa*

Office and mixed-use projects are more likely to succeed when the surrounding environment is supportive and offers amenities such as restaurants, business services, and an attractive physical environment. Even if the site is successful in attracting corporate office, it is more likely to be ring-fenced into a gated community rather than integrated into an urban environment if surrounding areas are of low-quality. Most importantly, the economic impact of the site itself is not maximized if efforts are not made to leverage the project to support redevelopment in surrounding areas. The best way to achieve such impacts is through infrastructure and investment that links the site to development in surrounding areas. Thus, the key issue relates to how best to leverage this site in order to maximize its broadest possible economic impact.

- **Business and Land Use Mix.** Based on the market analyses, there would be potential for the following mix of uses at the site under certain conditions. This business mix is only conceptual based on the study area market analyses and would have to be tested further in order to determine the market potentials specifically for this site.
  - Office: 131,200 to 208,900 square feet, including potential for all or some of the following, based on the market analysis. (Detailed market findings, along with a full explanation of the methodology for deriving these numbers, are found in the Volume 2 Report):
    - Technical and professional services, especially those oriented to green building, energy, healthcare, and associated services.
    - Management services (e.g., corporate office) targeting companies like eBikes (electric bicycle company located in Nolensville Pike).

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## ***Nolensville Pike Market Analysis***

- Insurance and financial services/back office (especially relating to green building and health care)
- State Government offices (given that there are already State agency offices in this area and that State Government is a major driver for inner-city office space in Nashville).
- Association headquarters, particularly related to green technologies, health care, energy, etc.
- Institution-related research & development. Linkages with universities and other institutions could generate spin-off potential perhaps for certain research & development space, although there are challenges to this prospect not the least of which is that the study area is, while proximate, not located directly adjacent to a major research university.

It should also be noted that there can also be “drop-in” uses such as major corporate headquarters recruited from outside of the market area through aggressive economic development efforts. In some cities, companies are attracted through incentives that reduce the effective development cost or rent. Office projections generated by the Nashville Area Chamber of Commerce or the Mayor’s Office of Economic and Community Development for the Fairgrounds Site may assume pro-active incentives and recruitment of corporate uses that are not included in office market forecasts that underlie this recommended program. Metro economic development agency staff note that four companies have already expressed interest in locating large corporate offices at the Fairgrounds Site, based in part on their recruitment efforts. Finally, the market analysis is restricted to a five or ten-year forecast period based on realistic economic projections, while there may be opportunities for corporate relocations within and beyond this forecast period that are not included in the market-based concepts described herein.

- Retail: 10,000 to 12,000 square feet of primarily site-serving retail.<sup>8</sup> Additional retail use (e.g. restaurants) might also be encouraged in the gateway node located at “The Split” or in other redeveloped commercial nodes in the Fairgrounds Green Gateway segment of the corridor.
- Residential: 120 units in mixed-use buildings with retail and health club, or 50 to 60 units in mixed-use and 30 to 60 townhouses.<sup>9</sup> There is the opportunity to create a mixed-use community at this site. Once again, the possibility for maximizing this potential is increased if surrounding areas are made to be more safe, secure, attractive, and vibrant. It may also be advisable to locate the

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<sup>8</sup> See market analyses provided in the Volume 2 portion of this report.

<sup>9</sup> Ibid.

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## ***Nolensville Pike Market Analysis***

housing component elsewhere in the corridor in order to maximize the land available for office use. This would, of course, reduce the urban mixed-use development opportunity for the site.

- Other: Open space and public amenities (e.g., walking trails, outdoor recreation facilities). A park has been proposed by Metro officials and approved by Metro Council within the flood plain, which will provide the site with its unique amenity and marketing hook (i.e., Fairgrounds Green). A first-class health club would be recommended as noted above.
- **Change in Environment/Context.** One of the underlying assumptions for the market demand forecasts at this site is that there would be a positive upgrading in the physical and business environment of areas surrounding (and en route to) the Fairgrounds Site. Such a change in environment is probably not likely without public intervention and investment in infrastructure and land use. Key requirements would include the following:
  - Removal of the mobile home park and adjoining business uses that were located across from the Fairgrounds Site. Flooding of this low-lying site has created a situation where continued habitation there is unlikely to be tenable. Relocation of the mobile home residents is imminent. The mobile home park should not be replaced with other development since it lies directly in the revised floodplain maps. Rather, an attractive greenway could be extended along Browns Creek as an amenity for this area.
  - Removal or required screening of the container storage yard located across Nolensville Pike/2<sup>nd</sup> Avenue South (Ensley Boulevard) just north of the site.
  - Creation of a gateway entrance to the site that establishes a high-quality environment, including heavy landscaping and appropriate signage. But the site would not be treated as an “office park” developed in a suburban style. Rather the site would be developed as a mixed-use community that is integrated to the extent possible with adjacent commercial node uses.
  - Creation of central parkland (a “green”) as a public amenity within the floodplain portion of the site as already proposed by Metro.
  - Boulevard and streetscape improvements between the Fairgrounds Site and I-440 as part of the Fairgrounds Green Gateway concept described earlier in this report.



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## ***Nolensville Pike Market Analysis***

- Infill industrial development within the designated industrial parks (Rosedale and Interstate Boulevard) to include clear physical definition of industrial areas as described elsewhere.
- Consolidation of commercial uses into two nodes (plus the addition of restaurants) located at Polk Avenue and the I-440 Interchange.
- Redevelopment of the Chestnut South district to low-impact office, community, and residential (as described previously). Consolidation of office/service and convenience uses to redeveloped commercial node at “the split,” and reduction of car lots and auto service in this area. There is a need to reduce commercial sprawl along Nolensville Pike and this area provides opportunities for change of use due to the relative paucity of commercial activities. There is also a need to reconfigure the odd-shaped and shallow lots along this hilly stretch. Widening of 4<sup>th</sup> Avenue South from I-65 to Wingrove Street would provide opportunities not only for higher traffic capacity (as discussed earlier). Widening of 4<sup>th</sup> Avenue could also require the use of business properties along this stretch which would enable faster redevelopment. There may be some urban design and planning challenges associated with widening, however, so additional study is warranted.
- **Marketing & Management Strategies.** As noted previously, there is the opportunity to create a public-private partnership or redevelopment authority with a sunset clause to oversee redevelopment of the Fairgrounds Site and for investment in adjoining infrastructure as well as ongoing management and marketing of the site and surrounding gateway area for a set period. It is not recommended that Metro invest in upgrading or redevelopment without a long-term commitment or plan for management and marketing the site and surrounding areas through build-out. The project deserves a long-term commitment and should be wrapped into a broader development and marketing program for the Fairgrounds Green Gateway area.
- **Financing.** Metro has relatively successful experience in the use of Tax Increment Financing (TIF) for infrastructure to leverage private investment. The Fairgrounds Site, especially if wrapped into a broader investment strategy for the Fairgrounds Green Gateway area, would be a logical project for TIF financing of design and engineering work, roads, bulk infrastructure, and urban design improvements including boulevard improvements to Nolensville Pike through this area.
- **Operating Funding.** Again, it may be advisable to establish a public-private partnership or redevelopment authority funded initially through annual operating grants but then self-financed through land sales, rentals,

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## ***Nolensville Pike Market Analysis***

parking fees or other on-site revenue sources. This funding would pay for staff to manage capital investments and market the Fairground Site and adjoining Fairgrounds Green Gateway to attract business investment. If a public-private partnership, then private investors would also contribute to operations costs and provide staffing for marketing and management. Of course, these are concepts for discussion purposes since a detailed economic or financial assessment of the Fairgrounds Site was not conducted as part of this study.

### **Alternate Node: Futbol City Node**

There has been an opportunity identified for a soccer stadium to accommodate the Nashville Metros as well as various immigrant and youth



leagues. The stadium could form part of a larger node that also includes family entertainment, destination sporting goods and dining and retail based on the outcome of the market analyses. An ideal location for this node may have been the Fairgrounds site or another location within the Fairgrounds Green Gateway District. Mixed-use development is likely to be a higher or more valuable use for the Fairgrounds site (although a proper soccer facility can help the city enhance its image and increase its chances of gaining tournaments including a future World Cup, even if World Cup games are not actually played at this stadium). As such, alternative sites would need to be identified as there are few other locations within the study area with sufficient land for this type of development. An alternative would be to locate such a facility on undeveloped land in the southern stretches of the corridor such as south of Old Hickory Boulevard. Regardless of location, the synergies between the sports facility, family entertainment center, destination retail, and eating & drinking will increase opportunities for tourism and enhance the tourism attraction mix along Nolensville Pike.<sup>10</sup> Key components of this complex would include:

- **Soccer stadium**, sufficient to accommodate Nashville Metros games as well as immigrant leagues.

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<sup>10</sup> Image source: FARS News Agency.

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- **Family Entertainment Center:** 36,000 square-foot branded family entertainment center, perhaps sports themed.
- **Soccer sporting goods “concept store”:** 10,000 square feet, oriented to the soccer fan, foreign-born markets, and professional sports fans.
- **Food:** Restaurants, ice cream, and international takeaways: 8,000 square feet.

### **Key Industrial Park Nodes:**

#### **Rosedale Industrial Park and Interstate Boulevard Business Park**

Two large existing industrial areas within the Fairgrounds Green Gateway District would be defined, marketed, and managed through designation as



industrial and business parks. Definition would be achieved through attractive signage, landscaping, and fencing where appropriate. Such improvements might be wrapped into the TIF described for funding the district’s roadway and urban design improvements. A business park entity on the lines of a BID would be created to maintain, manage, and market both of the parks (and possibly others in the corridor such as the Allied Drive area). Like any

other BID, the property owners would need to approve a levy, so there would be a need to illustrate the tangible benefits from such a program. In this case, like with a TIF, it can be shown that there will be an increase in property values over time, a reduction in vandalism and other costs, and an increase in marketability for attracting tenants. In these parks, some of the companies are in owner-occupied space, so there is likely to be more interest in the benefits than there would be among absentee landlords.

### **Segment #3: The International Corridor**

Nolensville Pike already functions as a hub of commercial activity oriented to immigrants, foreign-born residents, and other Nashvillians and tourists



interested in various cultures. There is clearly the opportunity to celebrate this character and also to strengthen, diversify and add value to it as a key identity marketing theme to attract more destination inflow and tourism. Use of this asset will also help build stronger nodes and communities, by providing a friendlier and more positive commercial “face” to the adjoining neighborhoods. Specific nodes with individual and unique identities should be further developed along the corridor to help strengthen the overall segment concept.

**Segment Boundaries.** I-440 would form the northern-most end of the International Corridor concept, which would extend south through the study area. There is some international commercial, industrial, and civic activity located north of I-440 (including production of ethnic food and other goods for the target market). But there would be an effort to recruit some of those businesses and civic uses to relocate into the International Corridor in order to strengthen the marketing concept. The study area actually forms only one part of this corridor, since there is also a very large concentration of foreign-language and international product marketing among businesses *south* of the study area through to Harding Place (and beyond until Lenox Village). Key districts include the Woodbine-Madreseiva Commercial District and the Radnor Commercial District. Within the Woodbine District is the Flat Rock Node and the Downtown Woodbine Community Node. The Industrial area surrounding Grandview Avenue is designated as a transition zone. Within the Radnor Commercial District is a node between Antioch Pike and McCall Street (NolensVilla Marketplace) and a Cultural Center at Radnor Street.





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The Allied Drive area is designated as a more formalized industrial park and a commercial node is established at the Nashville Zoo. The marketing segment, potential nodes and districts are shown in the map above by Metro Planning.



Images: "The Drive," (Commercial Drive, Vancouver, BC Canada) – street scene, ethnic bakeries, Italian food market, store selling home furnishings from Thailand; ethnic store in Albany (NY); attractively-landscaped/buffered used car lot on Guess Road (Durham, NC); other images by RGDE.

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## ***Nolensville Pike Market Analysis***

**Use of Identity Nodes.** The International Corridor concept should be focused in specific nodes, in terms of the highest concentrations of commercial, cultural, recreation, civic/religious, and community activities. The individual nodes would be linked by the marketing strategy and by the unique urban design components that help strengthen identity. *It does not matter that some areas of the corridor are not focused on foreign or international commercial or community activity, as the marketing theme is meant as a linkage tool for marketing the entire corridor and enhancing the benefits that accrue to all types of businesses whether they carry international merchandise or not.*

**Roadway & Transit.** It is highly recommended that a corridor transportation assessment and plan be developed that focuses on enhancing the character and performance of the roadway throughout and at specific nodes. A critical component should be consideration of approaches for creating more pedestrian-friendly road interfaces at key intersections and within the nodes. While the building form codes and regulatory mechanisms have attempted to address this issue within the *South Nashville Community Plan*, there is still the need to examine the roadway itself as a design consideration.

As noted earlier, five and seven-lane highways like Nolensville Pike can be made more attractive and pedestrian friendly through a boulevard treatment. Tree-lined medians help create islands for crossing safely and also provide a green landing to break up the monotony of the pavement. Often such medians can be designed without loss of transportation mobility. Transportation planners can also develop approaches for pedestrian safety and movements within key nodes.

**Urban Design & Streetscape.** Urban design is an important tool for *marketing* commercial districts and corridors as destinations to reduce leakage and enhance overall marketability. But, urban design improvements should be informed by the target market considerations and overall marketing strategy. The corridor concept would be linked through pro-active marketing as well as roadway, urban design and streetscape elements. More concentrated and unique design components would be focused within specific nodes, above the beyond the basic linkage elements. Such basic linkage elements should include the following:

- Gateways, at the entry and exit from the overall corridor (such as at Craighead Street and Harding Pike) as well as at key cross roads (Thompson Lane, Harding Pike, Interstate 440 off-ramps). Such gateways should be substantive, perhaps designed based on a regional design competition and using materials, media (e.g., sculpture), and concepts that have a long-term application. Additional elements such as maps or cultural information could be incorporated into ancillary elements with off-street visitor parking and/or transit stops. They are not simply attractive



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signage. The gateways would become important long-term investments in Nashville's overall urban design context. They should speak to the diversity of the corridor's cultural communities yet be accessible to visitors. In the end, such gateways can themselves become visitor attractions where tourists would be seen taking pictures of them.

- Signage. Various uses of consistent signage along the route will help to reinforce the concept and overall branding. A name theme will be very important as part of the branding effort.
  - Directional Signage would be included along highways and feeder routes, including the convention center area and 4<sup>th</sup> Avenue South in downtown Nashville.
  - Street Signs within the concept area would have consistent theme, but should not be identical. Each node could for example have its own theme (see nodes) but the sign size and style would remain consistent throughout the concept area. Dual-language translation features could also be used to emphasize the international character of the area. Washington, DC's Chinatown is a perfect example of where local government has replaced the street signs with specialty red and green street poles and signage with street names in Chinese and English.<sup>11</sup>
  - Business Signage. Businesses would be encouraged to explore the use of artistic signs that emphasize their international / foreign-



language character. An artistic sign design service or signage specialist could be appointed or volunteer from within the city's pro

<sup>11</sup> Portugal Village sign source: Swire Chin Photos ©. Chinatown (Toronto) business signs by CanadaPhoto.

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bono design center or through a business improvement district (BID) or Community Development Corporation (CDC) to provide guidance to businesses upon request. This person would conduct a thorough signage assessment and identify any positive and unique elements that should be retained and encouraged, as well as negative elements and positioning/locations/excessive numbers of signs that should be discouraged. The specialist would consult with transportation agencies on signage issues and requirements. The specialist would also work with existing sign companies in the corridor as well as local artists to develop a set of templates, materials, and examples. Sign concept templates would then be distributed to businesses within the corridor that already have some use of foreign language or international products in their advertising and existing signage.<sup>12</sup>



Businesses would be pro-actively encouraged to upgrade and use the sign concepts where appropriate, on a voluntary basis. In Washington, DC's Chinatown, the municipal government actually required businesses to include a Chinese character version of their business name in their signage. However, a voluntary program may be sufficient for Nolensville Pike. Sign regulations and bylaws could be wrapped into an overlay district for the concept area to reduce any serious excess and misappropriated/located signage. But bylaws would be more than balanced by positive reinforcement through the use of free advisory services to encourage and assist business owners participate in the program.

- Public Art. A BID, CDC, or Metro Arts Commission-sponsored program of civic art would be developed for the concept area to focus on art designed by and/or directed to the multi-cultural international theme of the corridor. Specific placement of unique pieces within nodes would help to reinforce the concept at those particular nodes. Community involvement would be maximized not through hearings or planning meetings but through design competitions and community celebrations. The development of the public art program could be incorporated into the overall program for an Hispanic or international cultural center in the corridor.

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<sup>12</sup> Pho Vietnamese restaurant, Mount Vernon Triangle area (Washington, DC)



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- Façade Improvements. There is a need to identify any unique architectural styles or elements worthy of celebration and conservation within the area. While much of the corridor appears at first glance to include redundant strip retail and used car lots, on closer inspection there is an architectural vernacular that captures a 1950s/60s aesthetic that can provide a “funky fifties” context in some cases. In other locations in the corridor, the low quality of the building stock and lack of architectural details suggests that redevelopment is more appropriate. Providing façade grants or low-interest loans for façade improvements could help to enhance the overall physical appearance of the area.<sup>13</sup>
- Streetscape Elements. The streetscape elements presented in the *South Nashville Community Plan* (specifically the Nolensville Pike Corridor study) are attractive but mostly generic. As such, they do not reinforce the

<sup>13</sup> Chinese dragons below (Cidbia.org); Mission District, San Francisco (Flickr); statue in San Jose (Artshift); Humboldt Park, Puerto Rican community in Chicago (New Communities); Chinatown gate (Seattle International District); others RGDE.

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## ***Nolensville Pike Market Analysis***

existing and potential **market base** for this corridor and the opportunity to celebrate the area's communities. Streetscape elements should be oriented to maximizing the marketing concept and potentials for the individual nodes. It is not recommended that the corridor be fitted out with one consistent streetscape design plan. This would require an enormous



expenditure, particularly for under-grounding of utilities and other possible components. Rather, individual nodes would have their own character and specific elements. Gateways and consistent signage concepts (directional, street, and business identity) would be the primary element tying all nodes within the corridor together.



A recommended streetscape approach would place an emphasis on design and implementation of more intensive streetscape improvements (e.g., node-specific pavements, specialty lamps and unique street lights, public art and civic spaces, street furniture, etc) within core designated concept nodes. Broader roadway improvements, basic streetscape elements (e.g., tree planting/landscaping, segment-oriented street signage, etc) would be implemented throughout in the key sections of the corridor to help link the nodes and differentiate the segments.



**Landscaping and buffering** of parking and auto sales, service, and supply businesses can be easily achieved through incentives and regulatory mechanisms to improve the overall appearance of the corridor environment. Pictured is an auto-related business with landscaping that reduces the visual impact of the building and associated parking.



**Management Strategy.** There is the opportunity to establish a Nashville International Corridor Community Development Corporation (CDC) to leverage private, public, and foundation support. A CDC could provide a vehicle for bringing diverse groups, businesses, and property owners together for common purposes. Through an appropriate process of engagement with key leaders, a board would be established that would provide sufficient representation to ensure outreach to many segments of this diverse business community. With community buy-in, a CDC would have more authority and the ability to work with Metro Government to help ensure broader participation in the revitalization process.

It is recommended that the CDC take a lead in direct marketing and economic development efforts in the corridor such as in small business and entrepreneurial development, property upgrading and redevelopment, annual events, shared business services, and business recruitment, due to its flexible structure and broad mandate. The CDC could become directly involved as an Intermediary between business and the community on key issues, such as predatory lending among used auto dealers and Police enforcement of immigration laws, which affect businesses and residents in the area.

Many CDCs receive start-up and continuing grant funding through federal CDBG as well as local government and non-profit agencies (e.g. Nashville Community Foundation). A CDC would not have the automatic revenue source to perform the basic services (cleaning, security, etc) that could be accomplished, say, through a business improvement district (BID), but could still embark on some of the same services as grant funding and earned income allows. The CDC could become directly involved in property redevelopment and through rental income for example, generate revenue for providing services like a BID.

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## ***Nolensville Pike Market Analysis***

Over time, the CDC could help establish a Business Improvement District (BID), which would be approved if property owners agree to participate in a self-imposed levy. That levy would support any number of services such as marketing, management, cleaning, safety & security, capital improvements, consultants, events, and other efforts that would bring mutual benefits to the property owners (and businesses). The financial viability of a self-funding BID would have to be tested in terms of willingness to pay and amount required to support necessary services. BIDs are successfully implemented in a number of locations throughout the country beyond just downtown areas, especially in areas with a large number of commercial property owners who have a vested interest. A BID would focus on the following activities and services:

- Development of a Management Plan, developed by the CDC's Board to guide service delivery and development.
- Cleaning services that are mainly focused in the key nodes.
- Business signage and design services, as outlined in the urban design recommendations.
- Streetscape implementation and maintenance, including top-up services (above and beyond Metro responsibilities) relating to landscaping, signs, sidewalks, street furniture, and public art.
- Events planning and management, through a specific events committee.
- Marketing and recruitment, focused on delivery of services outlined herein based on a marketing plan.
- Public relations and liaison to media, Government agencies, residential neighborhood organizations, individual businesses, developers, property owners, and others.

**Marketing & Recruitment.** In addition to urban design, there are other tools and strategies for marketing the overall corridor. These strategies are summarized below. An overall marketing and recruitment plan is provided later in this section that discusses specific strategies for capturing the market potentials.

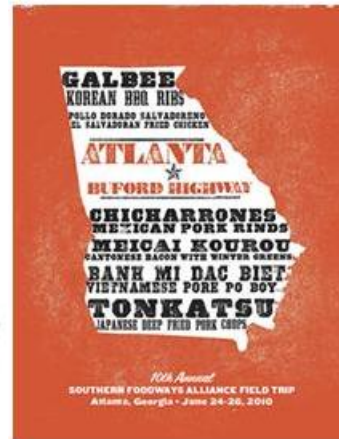
- Marketing
  - Marketing Program. The CDC would develop a comprehensive marketing program for the corridor concept.
  - Business Outreach. Outreach must be conducted to all businesses in the corridor to explain the marketing program and gain buy-in on a business-by-business basis.
  - Outreach Materials. Develop branding/imaging outreach materials.



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## Nolensville Pike Market Analysis

- Collateral Materials. Develop tangible marketing materials including fold-out brochures featuring maps and aimed specifically at the destination shopper and tourists.



- Website and Online Marketing. Develop a web site and create online marketing resources.
  - E-Marketing. Establish e-marketing efforts including regular communication with neighborhood residents, regular customers, and target markets.
  - Social Media is increasingly used by urban commercial districts to communicate with existing and sometimes, potential customers.
  - Advertising. Various advertizing alternatives should be explored by the CDC or business district marketing committee.
  - Events. Clearly, there is the opportunity for the corridor to reinforce its image and establish excitement through annual events and regular functions. Because of the inherent interest in international foods, fashion, music, sports, and culture, there are multiple opportunities to develop a strong event marketing effort. One of the best examples of an event in an international district is the annual Adams Morgan Day event in Washington, DC, which attracts thousands of residents from the region and beyond to a diverse offering of international foods, merchandise and entertainment.
  - Public Relations Outreach is an important (but often ignored) part of the marketing effort. Ensuring that there is positive media coverage not only locally but regionally and nationally is critically important to maintain and improve image.
- Business Recruitment
    - Consultant and CDC outreach.
    - Recruitment Plan
    - Local Entrepreneurship Program

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## **Nolensville Pike Market Analysis**

**Tourism Development.** Nolensville Pike has an untapped destination and tourism market that could be further developed through the establishment of individual nodes and overall marketing identity. These overall identities include the international corridor concept as well as artisan industrial areas, but also through development of specific theme nodes such as one relating to the Nashville Zoo and a proposed International Marketplace (see further discussion on nodes below). Tourism can bring expenditures that support growth of certain positive businesses in the area, improving the redevelopment opportunities of auto-related sites.

**Funding.** Funding for capital improvements such as urban design and streetscaping would be developed based on Metro Government's normal sourcing plans but with additional leverage through sponsorships and contributions for specific projects (such as public art and gateways). Operating funding, above and beyond regular Metro agency budgeting, would be generated through BID levies to cover top-up maintenance, management, cleaning, marketing, and events. The CDC would also generate funds from property rentals and other earned income for services, business contributions, and non-profit and government grants.

### **Key District: Woodbine Commercial District**

The area of Nolensville Pike between I-440 and Thompson Lane could be marketed as the Woodbine (Madreselva in Spanish) Commercial district, a segment of the International Corridor. Woodbine is named after the honeysuckle flower, which translated into Spanish is the beautiful word, Madreselva. So, there is the opportunity to use *both* the English and Spanish names for the area in marketing and branding to various audiences. Use of the honeysuckle flower for example may be appropriate for incorporating into marketing materials.



Based on door-to-door inventory, nearly 60% of the 80+ Woodbine commercial businesses and religious institutions have building signs written in a foreign language. Many are owned by or marketed to the international community. Even businesses that do not have a foreign language in their signage (such as chain stores) are marketing to recent immigrant populations. There are six churches in this area, plus several community-based organizations with storefronts catering to the Latino community. As throughout Nolensville Pike, the area has its share of used car lots, with eight such businesses (or about 10% of the storefronts). While hard to spot while speeding along Nolensville Pike, the

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## ***Nolensville Pike Market Analysis***

area has a wealth of unique businesses and destination retailers (targeting a variety of markets). A sample includes:

- Parisa Café, a popular Persian restaurant
- Rumba Nite Club
- Dunya Kabob (Kurdish) Restaurant
- Able Restaurant Equipment
- Sylvan Park Café (a branch of traditional “meat n’ three” restaurant)
- La Hacienda (popular destination Mexican restaurant and panaderia)
- Istanbul (Turkish) Restaurant
- Phonoluxe (destination music/video store)
- Hickerson Motel (vintage highway motel, harkens back to early years)
- Taqueria Express (one of the many taco stands along Nolensville Pike)
- Shubha Ladies Clothing
- La Yaquita Supermercado & Carniceria (grocery & butchery)
- Variedadas Latinas (Latin American party & gift shop)
- Nashville Psychic Center

There is a small commercial node within this district that is being called Flatrock by neighborhood residents based on the historic name for this particular area. Flatrock is centered at the intersection of Whitsett and Nolensville Pike. However, the intersection of Thompson Lane and Nolensville Pike is the primary node for the Woodbine-Madreselva district.

- **Marketing Concept & Business Mix.** The concept for this area is consistent with the overall theme of the International Corridor, in terms of creating a destination identity marketing district focused on the diverse international and local businesses that are based here. Many of the same strategies will apply here as in other parts of this International Corridor, namely to become part of an organized Community Development Corporation (CDC), Business Improvement District (BID), or organized business association focused on marketing and promotion, business recruitment, store signage, design, communication, and other elements. Urban design improvements such as specialty lighting fixtures, pavers, and public art implemented by Metro and/or a CDC or BID would emphasize the diversity of this corridor, particularly the international flavor. Building façade improvements and business signage on private properties would also celebrate the diverse nationalities and character of the area. Business recruitment efforts would focus on attracting the following retail businesses (based on the market analyses and recommended business mix explained in more detail in Volume 2 of this report) that would strengthen and diversify the business mix for this area away from a dependence on auto-related and loan businesses.
  - Specialty / Ethnic Food Store & Cafe, with a larger selection of destination goods and outdoor cafe: 5,000 square feet

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## ***Nolensville Pike Market Analysis***

- Specialty kitchenware retailer, oriented to the emerging homeowners in the area and complementing the industrial kitchen equipment supply business: 6,500 square feet
- Handicraft/Imported toys & games, oriented to foreign-language or imported products that cannot be found in other toy stores in the region: 2,200 square feet
- Stationary/office supply, to fill a gap in the market: 3,500 square feet in this area.
- Florist/Tropical garden supply store, 4,000 square feet
- Pet store: 2,500 square feet.

These businesses would be recruited to fill vacant space (estimated at 11,000 square feet) and for new infill construction and redevelopment of under-utilized spaces. Among the target locations for redevelopment or infill are portions of the 2700 block.

- **Marketing Strategies.** Marketing would be handled by a sub-committee of the overall International Corridor CDC, BID or business group, focused on this district. Marketing for this specific district would emphasize the area's unique destination businesses (some of which were listed above) and the focus on Mexican, Persian, Turkish and Kurdish elements. The Flat Rock node would be emphasized in marketing efforts aimed at certain local non-international target market segments. Specific events and other efforts are noted below.
  - Flat Rock Music Event. A localized annual event would focus on the Flat Rock community and feature diverse music styles. Native American history would be celebrated, perhaps with an annual ceremony during the festival at the site of the Flat Rock.
  - International Corridor Festival. An annual festival would be held throughout the International Corridor, and the Woodbine–Madreselva area would host several of its own events, celebrating key cultures, unique businesses, and civic organizations in the area.
  - Public art would be developed throughout the corridor through a design competition and with input from district businesses, churches, schools, neighborhood residents, and foreign-born patrons of the local businesses.



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## ***Nolensville Pike Market Analysis***

- **Redevelopment.** As noted above, targets for redevelopment could include under-utilized portions of the 2700 block as well as selected parcels in the Thompson Lane intersection node. Like much of the corridor, parcels are small and relatively shallow. There is dense commercial development throughout the corridor, including this district, particular since many buildings have been sub-divided into small business spaces due to cost sensitivity on the part of tenants. The result is that consumers (whether commuters, tourists, or even neighborhood residents) tend to only see a “blur” of commercial use and signage, with few anchors and even less opportunities to pull over and walk.

Because the lots are relatively narrow, redevelopment is difficult. In order to create more land for growth and for anchor uses, such as a kitchenware retailer, it is recommended that consolidation of parcels be encouraged, particularly to the rear of the site (such as between Nolensville Pike and Grandview to the west or between Nolensville and the first three residential lots on the east).

- **Refuge Parking Areas.** There is a need to create small “refuges” within the district and the corridor, where drivers would be encouraged to pull over, park and walk to the various businesses. There would also be bicycle racks, shade trees, and transit stops at these locations. Clearly it is not in Metro’s interest to create many small parks in the area, which would prove to be a maintenance challenge. Rather, the refuges would be designed not to require maintenance and where occasional upkeep is helpful, it would be handled by the BID or CDC. With this in mind, Metro Planning and Public Works Departments might examine specific non-built locations (for example under-performing used car parking lots or vacant land) for purchase as parking and pedestrian refuges. Ownership might rest with Metro, but the CDC or BID would have responsibility for upkeep.

## Nolensville Pike Market Analysis



- **Thompson Lane-Nolensville Pike Community Hub.** Thompson Lane / Briley Parkway is one of Nashville’s primary circle roads and commuter access routes. As noted elsewhere in this report, Nolensville Pike generates nearly 60,000 ADT (average daily traffic) counts at this location. Thus, the intersection of Nolensville Pike and Thompson Lane is the “100% Corner” for the corridor, in the sense that it is the location where commercial exposure and consumer traffic would be maximized. Where traffic is maximized, the best market opportunities exist for retail and commercial uses and the highest prices for commercial property.

The highest density of commercial use would be expected at such intersections, and would “step down” to neighboring parcels. The particular suburban development history of this intersection has not-surprisingly given rise to a relatively low-density but nevertheless high-value node, with a new car dealership and sales lot on the south-east corner, a drive-through fast food chain restaurant on the southwest corner and a pharmacy chain on the northwest corner. The northeast corner is occupied by a community center and open space field. National franchise chains and new car dealerships tend to generate high-volume sales and

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## ***Nolensville Pike Market Analysis***

pay among the highest rents and prices for their prominent locations. The overall redevelopment concept for this node extends beyond the properties on the four corners of the intersection, of course, but these properties have the highest exposure. Ideally, there would be high-density redevelopment of this node in order to generate a higher profile for the corridor and enhance its identity. Key recommendations are provided below.

- **Mid-Density Mixed-Use Project.** Because of the value of this land, it would be difficult to redevelop these sites for higher-density commercial or mixed-use unless the market supports high-rise development. In fact, there is market demand for retail, office, and rental flats in mixed-use buildings at this location. However, the density and pricing may not be sufficient to overcome the commercial land costs at the present time. In some cases, there may be the opportunity for integration of existing commercial uses into a mixed-use plan. This is a possibility with the pharmacy on the northwest corner, for example, but probably not with a Nissan franchise on the southeast corner. At any rate, a concept is recommended for higher-density (3/4-story) development on the northwest corner, extending west to Grandview Avenue and north for two blocks with one building at McClain Avenue and the other at Central Avenue. The following program<sup>14</sup> would have to be further tested in the market and through financial analysis:
  - Retail/commercial: 25,000 to 30,000 square feet in ground-floor space including the existing Pharmacy, Krispy Kreme, and Southern Trophy House plus international café with outdoor seating, convenience food store, professional (doctor/dentist) office and small health club.
  - Office space: 15,000 to 20,000 square feet in medical and other professional offices.
  - Housing: Up to 100 units of mid-market rental flats (which might be converted later to condos) with shared parking.

This program would replace several existing uses including vacant garages, a palmist, car stereo repair, Lion's Den Adult Superstore, trailers, and two used car lots. A planning effort centered around this mixed-use node is recommended to incorporate property owners and businesses into discussion regarding equity participation in a redevelopment project. Conceptual renderings would be produced that focus on creating identity for the intersection, assisted by the architecture of the buildings, signage, and landscaping. A redevelopment zone might be established where design standards and planning policy would be focused and

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<sup>14</sup> Based on the market analyses, detailed in the Volume 2 Report.

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## **Nolensville Pike Market Analysis**

where key development incentives (like tax abatements and infrastructure) may be offered.

- **Streetscape & Design.** There is also the need to establish an identity at this key intersection and build on the strengths of the corridor. Identity can be enabled through streetscape and urban design, transit facilities, public art and other elements in the physical infrastructure. An attempt to enhance the pedestrian safety at this location has been made through brick pavers and other elements, but the design and material used is not strong or powerful enough to match the scale of the intersection and develop an identity at the meeting of these two major corridors. Efforts should focus on:
  - Gateway Elements oriented to the International Corridor theme through sculpture, signage, and special street lighting.
  - Attractive special traffic light signals
  - Landscaping to soften the harsh streetscape
  - Landscaping and active programming of Coleman Park, such as through public art or murals that present a strong identity for the area. Coleman Park is located on the “100% corner” of the Nolensville Pike corridor. The community center renovation provides an interesting aesthetic, but the park cannot be treated as a normal playing field in a suburban setting. From a marketing perspective, this is the “town center,” the hub of the corridor, where the identity of the area is established. There needs to be a more active engagement with the park as an *urban* space, whether it is partly hardscaped and planted to provide a place for festivals, or engaged in other ways to become a center for the community. As noted later in this report, the site would be ideal for an international community cultural center or sports facility, but there are apparent physical constraints and other community priorities for this site.
  - Façade treatments and landscaping of surrounding business sites to ensure a high-quality but interesting environment. When there is no public intervention in the market, intersections like this will attract large chain businesses. Yet, it is the small independent businesses that actually comprise the unique identity of this International Corridor. So, in order to help convey the unique qualities of this place to pass-through traffic, the CDC or BID would help provide input on façade improvements by linking businesses to pro bono design assistance, loans and grant programs. Design standards would also help to regulate the appearance of private properties.



## Nolensville Pike Market Analysis

- Improvements to the transit facilities that reflect the identity marketing of the area and provide safe, convenience transit usage for residents and visitors. There may also be opportunities for special shuttle services throughout the corridor to move residents and visitors between nodes while reducing the number of auto trips.
- **Grandview Transitional Zone.** The triangle formed from Melrose Avenue south to Thompson Lane, and Grandview Avenue (east) to the CSX railroad (west) provides an opportunity for transitioning an existing industrial area into mixed-use/commercial. Internally, the area is relatively attractive as an industrial node, but again there is little definition to the boundaries of this zone. Because of its proximity to I-440, the area has been relatively attractive for small industrial uses. There is a need for screening of storage uses along Thompson Lane, perhaps through landscaping and/or murals providing a gateway into the International Corridor from the west. Because storage facilities do not directly benefit from road exposure, there are opportunities to work with the owner to develop an appropriate screening concept. Overall, the area operates as an “island” of industrial hemmed by commercial uses and railroad, so there is little opportunity for business expansion. Over the long term as the International Corridor develops, the storage site (or at least frontage) and others may become more valuable as commercial sites than as parking lots for storage facilities or otherwise under-developed sites.

### Key District: Radnor Commercial District

The Radnor (or Glenclyff) Commercial District, located between Thompson Lane and the railroad overpass, would also form part of the International Corridor. As such, it would also benefit from being part of the CDC or BID if implemented, in terms of marketing, management, maintenance, “crime & grime,” and physical improvements. A specific marketing identity would be developed for this area, which also has a number of businesses with foreign-language ownership and/or market base. Several international



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## ***Nolensville Pike Market Analysis***

community organizations are based in this area, including a Sudanese organization. The global language mix is even more diverse than in the Woodbine area, with Greek, various African, Brazilian, Peruvian, Thai, and others joining the mix of Mexican, Persian, etc. The area also has a significant used car dealership inventory, along with the attendant issues of over-supply. A sample of the unique businesses in the area includes the following:

- La Reyna Supermercado
- Tara Halal Market (& Arabic bakery)
- El Tapatio
- Woodbine Funeral Home
- California Original Jeans – Brazilian, Peruvian, Colombian
- Kebab Gyros Greek Restaurant
- Siam Café Thai Cuisine
- Africa Fabric Store
- Zein's Home Decoration
- Osborn's Bi-Rite Grocery
- Beverly's of Nashville
- Don Juan Carniceria
- Resturante Los Gordos
- San Jose Taqueria/Bar

Key to the strengthening of this area will be to create redevelopment opportunities for establishing destination projects. Key strategies are summarized below.

- **Redevelopment Sites.** Because the corridor is so densely developed and lacks sufficient large commercial sites for development, there is the need to create sites in order to leverage new development that will have a positive impact on the corridor and strengthen its overall marketability. Based on an initial assessment of physical conditions, locations, utilization, and synergies, three potential redevelopment sites have been identified within the Radnor Commercial District. These three potential sites are described below.
  - **Site 1. The Radnor-Nolensville Intersection.** The intersection of the district's namesake street and Nolensville Pike provides one potential site for redevelopment. The redevelopment site would encompass the area along the west side of Nolensville Pike bounded roughly by Morton Avenue on the north and Alley #1892 (between Radnor and Mclver Streets) on the south. Development would extend on both sides of Radnor Street. Existing uses include a residence, dentist office, salon, pawn shop, and **six** used auto lots. Thus, an advantage of redevelopment at this site is the opportunity to address the oversupply of used car lots in the area. The relative disadvantage of this site is its location near the

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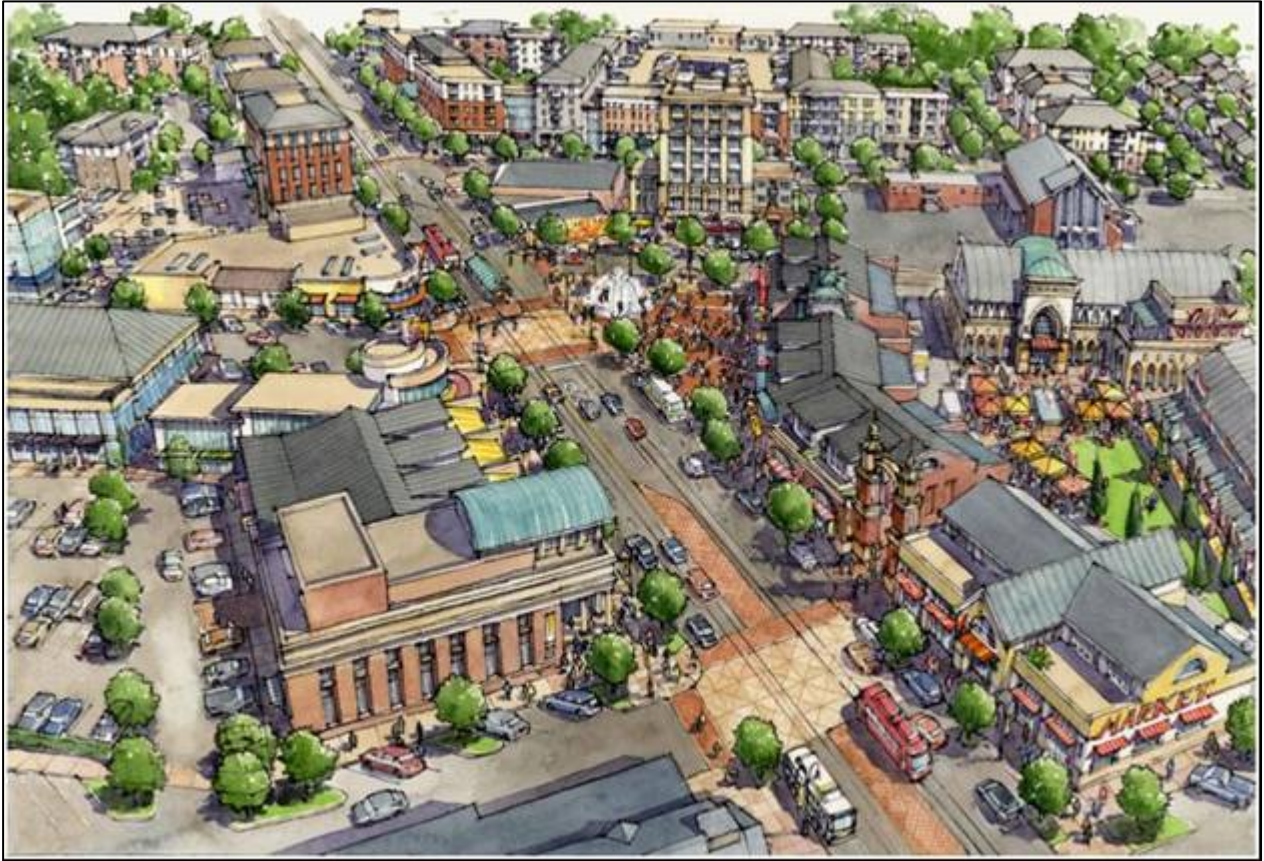
## ***Nolensville Pike Market Analysis***

northern boundary of the district where it would have less impact overall.

- **Site 2. Harrison-Wheeler Area.** There is another opportunity for redevelopment on both sides of Nolensville Pike from just north of Harrison Street, south to Wheeler Avenue. Existing uses include check cashing, **four** used car lots, tobacco store, gas station, auto maintenance/tires.
  
- **Site 3. The Antioch Pike-Nolensville Intersection.** Sites on both sides of Nolensville Pike would be redeveloped just south of Antioch Pike and McClellan Avenue. The potential site would include the area along Nolensville Pike roughly between Antioch/McClellan on the north and McCall Street on the south. The now-vacant Walgreens Drugstore site, along with parking lots and another vacant site on the same block, provides an excellent opportunity for assembling a large parcel for redevelopment. Existing uses in this area include a grocery (Osborn's Bi-Rite), hair salon, vacuum business, discount store, flea market, **three** used car lots, chiropractor, auto parts store, and multi-tenant space. Facades or structures for several of the vintage commercial centers could be integrated into new construction to retain the character of the area. **A concept for redevelopment of this area is presented below.**



**Antioch Pike Intersection Redevelopment Concept**



Rendering produced for Third Coast Design Studio.

Current Conditions in this area:



Key Components of the Concept

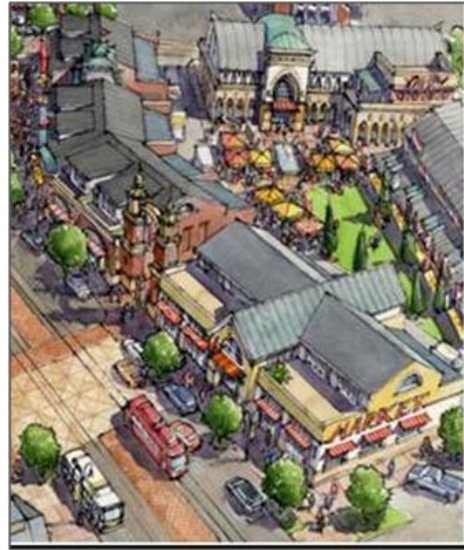
- **“NolensVilla International Marketplace.”** The market analysis (detailed in Volume 2 of this report) identified an opportunity to create a 1-2 story 15,000 to 20,000 square-foot destination anchor merchandise market that offers unique vendors and retail stores with an array of international merchandise and food that would appeal to regional and tourist markets. Given potential for locating at Antioch Pike, not far from the Nashville Zoo,



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## ***Nolensville Pike Market Analysis***

there is the opportunity for creating synergies and a walkable destination district. The market could be established through redevelopment on the west side of the district (shown as the collection of buildings surrounding an outdoor plaza, located in the bottom right quadrant of the image above). The marketplace would act as an anchor for the area to help attract related uses that will build the overall destination draw. In doing so, there is the opportunity to positively and pro-actively impact on land use in the area by changing the market dynamics, rather than trying to regulate certain uses out.



- **Development Program.**

Components of this market, cultural center and adjoining uses include:

- Destination Anchor Merchandise Mart: 20,000+ square feet with array of general merchandise in a unique international market format. There is demand for general merchandise within the study area, particularly if developed as a destination facility.
- International restaurants: 5,000 to 10,000 square feet with outdoor or courtyard café seating.
- Other Ancillary Retail: 12,000 to 18,000 square feet of foreign language books & music store, sewing materials, ethnic apparel, and convenience food in buildings adjacent to the anchor market.
- Expanded Grocery Store (Site 2 Only): 15,000 square feet of expanded grocery store space for Osborne's Bi-Rite store, which has started catering more to the Hispanic and international markets. If the marketplace is not located at this site, then there is still the opportunity for the grocery to expand as an anchor for a larger retail center.

## Nolensville Pike Market Analysis



- **International Cultural Center & Community Non-Profit Offices.** There is also the opportunity to develop a new international cultural center along with offices for ethnic community non-profit community offices within the corridor. Each of the three sites described above may be appropriate for this complex (although it is integrated into the Antioch



Pike rendering and concept plan shown above). The Cultural Center could be incorporated into the Nolensville Market concept or as a separate entity at either of the other two sites. The advantage of integrating the cultural center with the market is the synergies that could be generated for

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## ***Nolensville Pike Market Analysis***

destination traffic. The disadvantage is that there would not be many other anchor uses to leverage development in other parts of the district. There is a tentative plan to locate a Hispanic community center at sites on the periphery of the area, but the center could help generate even more synergies if integrated into the same node with the market and cultural center. The plans for the Hispanic community center apparently do not include a large cultural venue.

The concept rendering and conceptual site plan for the Antioch Pike intersection includes both the cultural center and the Hispanic community center, along with the market place. Prospective concept programs for the cultural space and community center include the following.

- **Cultural Center:** A 24,000 square foot Hispanic or international cultural center would be integrated into the overall complex, accommodating visual art studios, performing arts venues, practice rooms, community event space, and classrooms. The need for this facility has not been tested through market analysis, although the opportunity has been identified and the concept tested with community organizations.
- **Community Offices:** 10,000 square feet in office uses associated with the international community such as non-profit associations, business chambers of commerce, immigration lawyers, and advocacy groups. The proposed Hispanic community center could provide an important anchor for this complex.
- **Open Space, Landscaping, and Stormwater Management.** The following recommendations are made with respect to open space within the Antioch Pike-Nolensville Intersection node.
  - **International Public Plaza.** A public open space near the center of the node should be planned. The design should reflect the character of the “International Corridor” and be a flexible space that can accommodate permanent elements, such as public art, as well as more transient uses, such as outdoor dining and festivals.
  - **Other Open Space.** It is important to encourage smaller public and semi-public open spaces throughout the neighborhood surrounding the nodes. Many of these spaces may be in the form of pocket parks that occur between existing buildings or courtyards framed by new infill development. Such spaces must be functional and accommodate uses such as playgrounds or simply provide relief from the hardscape, which also helps to reduce stormwater runoff.



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## ***Nolensville Pike Market Analysis***

- **Open Space Management.** All new landscape, streetscape and open space design should integrate best management practices for stormwater runoff.
  
- **Allied Drive Industrial Park.** This existing industrial area was developed according to plan, has retained a set of larger single-tenant industrial uses and remains fairly attractive as an industrial location despite the aging of its space and its lack of direct Interstate highway access. Existing uses include Tennessee Valley Fireplace, Five Star Food Service, Sabre Defence Industries, Falcon Fabricators, Harlan Electric, and others. As with several of the industrial areas in the Fairgrounds Green Gateway District, there would be a benefit to providing this area with more definition and a marketing and management entity.
  
- **Redevelopment Process.** As with the Thompson Lane project, there is the opportunity to create a redevelopment zone based on an area plan developed in concert with property owners, community members, organizations, and businesses. This zone would include both regulatory standards as well as incentives for redevelopment. The CDC or BID would help work with developers in concert with property owners. Metro would offer incentives for redevelopment which could include accelerated “fast track” approval of the plan, density bonuses, relocation services, but most importantly site assembly through planning and negotiation with property owners. Again, the process would focus on equity participation in the project so that property owners can be incorporated into the process.

### **Key Node: The Zoo Node**

The Nashville Zoo is the region’s largest visitor attraction and is expanding to serve an even larger audience. As a major audience support facility and visitor attraction, the zoo has an enormous economic impact on the region but the immediate area surrounding the zoo only captures a nominal share of the zoo’s spin-off. There are opportunities to co-brand the zoo with a specific node surrounding its Grassmere location and to increase the overall exposure and visibility of the zoo within the corridor. There is also the opportunity to enhance the environment and the functionality of the road network and urban infrastructure in order to improve the zoo’s operations and marketability. There is the opportunity to increase the tourism potential and spin-off associated with but also beyond the zoo complex. Finally, there is the opportunity to create financial benefits for the zoo itself in order to increase its own sustainability and operating viability.

Other zoos have commercial activities oriented to the street. Some zoos are considering the development of hotels and other revenue-generating activities that would help the facilities generate even greater impacts to the local economy. Columbus (Ohio) Zoo and Aquarium is planning development of a 175-



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## ***Nolensville Pike Market Analysis***

room zoo-themed hotel that will include unique experiences such as a safari camp associated with its planned African savanna exhibition.

- **Land Use and Business Mix.** Key market-based opportunities for Nashville's Zoo node include the following<sup>15</sup>:
  - Zoo-Themed Eating & Drinking: 7,000 square feet in destination / zoo-themed restaurant that would attract visitors as an attraction unto itself.
  - Event Facility for parties that could be affiliated with the zoo (perhaps as an adjunct use of the themed restaurant).
  - Zoo-Branded Retail: 8,000 to 10,000 square feet in other themed food (e.g., ice cream) and retail merchandising associated with/branded by the zoo, children's toys & games, books, and related shopper's goods.
  - Zoo-Branded Lodging: Zoo-affiliated hotel that would be co-branded with the zoo property and developed to include restaurants and retail. This is an opportunity that has been identified but not tested through full market analysis.
- **Development Opportunities.** The existing zoo entrance and frontage is relatively obscure. On the other hand, the untamed forest along the zoo's frontage provides a respite from the non-ending commercial sprawl along the length of Nolensville Pike and also makes a statement about the zoo's environmental mission.

Across the road from the zoo, however, there is the opportunity to encourage densification and mixed-use redevelopment of the Windlands Shopping Center and associated pad sites. A more urban redevelopment of this site might include mixed-use buildings with ground-floor retail and +/-50 units of upper floor apartments/condominiums, or instead, hotel rooms.<sup>16</sup> At least one renowned facility, the Columbus Zoo, is in the process of developing a hotel at their property as a way of not only generating revenue but also creating more of a destination associated with the zoo attraction, thus enhancing the economic spin-offs in the local and regional economy. That hotel would have an interface with the zoo property including an African Safari camp-style element and unique guided zoo night visits for hotel guests.

An amalgam of these approaches may work best, with a themed lodging facility inside the zoo property and a themed restaurant node at the zoo

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<sup>15</sup> Based on the market analyses, detailed in the Volume 2 Report.

<sup>16</sup> Based on the Market Analyses detailed in Volume 2.

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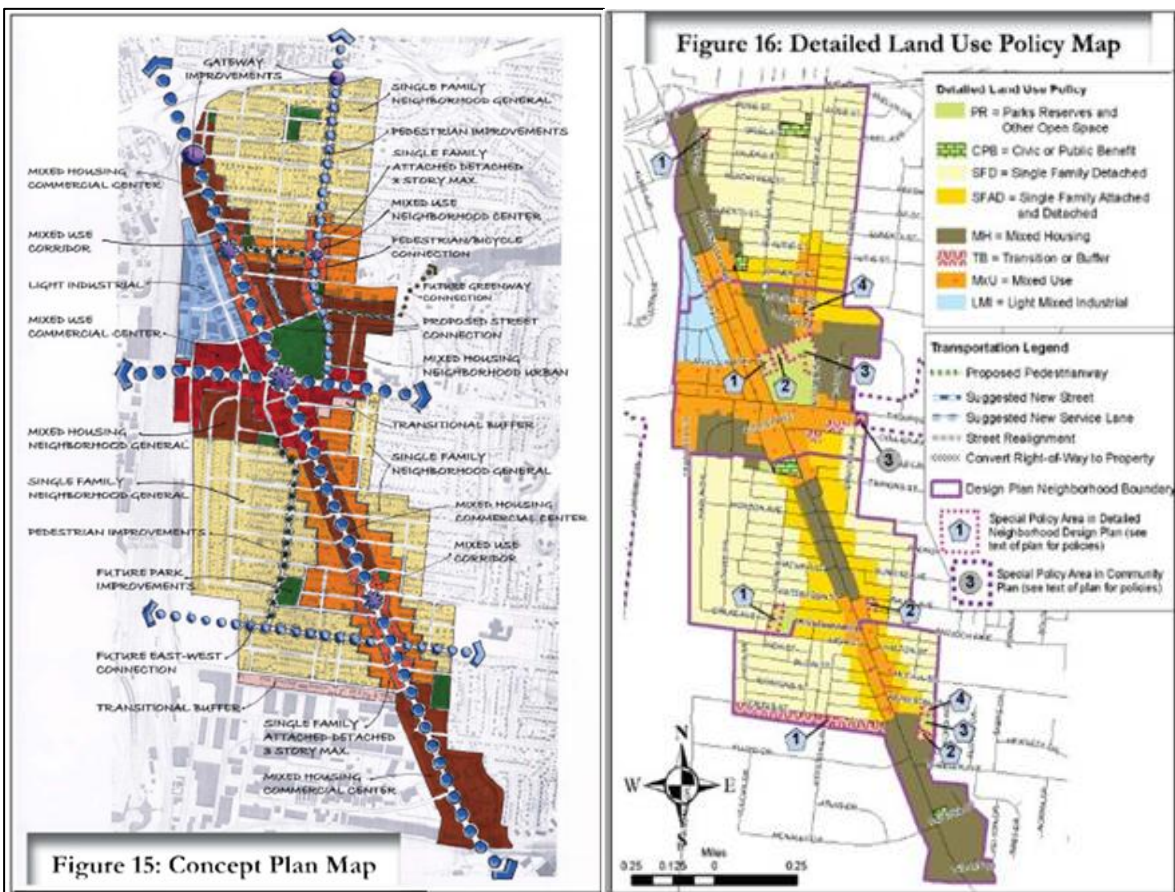
## ***Nolensville Pike Market Analysis***

entrance, coupled with intensification of retail and/or mixed use of the shopping center site opposite the zoo.

- **Road Functionality and Urban Design Improvements.** At present, zoo staff members indicate that there is a timing issue with streetlights at the entrance to the zoo. Metro Public Works officials are urged to examine this current situation to determine if there is an opportunity to reduce stacking at this light. More importantly, as the zoo expands and attracts more visitors, and as Nolensville Pike attracts more destination visitors overall, there will be a need for better traffic management at this location and throughout the corridor. There is also the need to create more of a gateway for this node that establishes a unique image through urban design and landscaping. Development of a traffic circle in front of the zoo might, for example, help alleviate some traffic issues as well as establish the gateway for the zoo and enhance the redevelopment potential for sites on the east side of Nolensville Pike. Such opportunities could be tested further as part of a broader roadway planning effort.
- **Funding.** The Columbus Zoo has a commercial division that will bring its land as equity in a partnership with a private hotel developer at its site. It has similar arrangements with restaurants and other operators. This type of arrangement seems to work well for zoos such as Columbus, which have become major destinations. Redevelopment of the shopping center site could be encouraged through discussions and master-planning efforts in partnership between the property owner, tenants, Nashville Zoo, and Metro. Over time, it will be important to communicate to the owner the importance of the zoo as a visitor attraction and the opportunities for redevelopment. If the center had high vacancy or were operating poorly, then it would perhaps be easier to gain the owner's interest. However, Windlands Center is fully occupied, albeit with discount tenants (like Rent-A-Center, Dollar General, and Music City Thrift) that may not be paying the level of rent achievable in a destination-oriented complex.

**Section 3. VIABILITY FOR SOUTH NASHVILLE PLAN**

This section examines the viability of uses and projects recommended in the *South Nashville Community Plan*, and specifically the *Nolensville Pike Corridor Detailed Neighborhood Design Plan (DNDP)*, based on the findings of the Market Analyses. In particular, specific uses at specific locations, the overall scale of land use versus market support, financial viability of conceptual land use & form, and project concepts are tested. Within this framework, any issues with the DNDP and overall Plan are flagged in respect to their market viability.



Source: Metro Planning

**Market Support for Planned Land Use Policies**

Land use recommendations in the *South Nashville Community Plan* and, in particular, the *Nolensville Pike DNDP* were examined in light of the market analysis. The general types of land use, scale of prospective

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## **Nolensville Pike Market Analysis**

demand/development, locations, and interaction between uses was examined. Clearly the market analysis entered into much more detailed land use categories than the plans proscribe, but there are basic comparisons between the overall mix of uses. A key consideration is that the market analysis also defines the marketing character of the corridor and its competitive advantages as a regional destination. This alters the land use perspective somewhat from the community plan, which was much more neighborhood focused.

The plan examined the corridor within the context of the surrounding neighborhoods (as a “zipper” between adjoining residential neighborhoods). While it is important to enhance the relationship between the road and the neighborhood, the market analyses suggest that Nolensville Pike must *also* be considered in the regional context as a corridor of regional significance. This regional market (and transportation) context translates into a different scale and mix of uses, and impacts on the design of the public and private realm in terms of streetscape and buildings. For example, the pedestrian orientation emphasized in the plan remains important but is more achievable if focused in key nodes along this long commuter corridor.

Many of the opportunities for revitalization in the corridor relate to destination marketing, focused on anchor uses including the Nashville Zoo and the International Corridor. Ironically, this same destination appeal also emphasizes the need to retain some of the corridor’s small business (and building) context between prime nodes, even as the more neighborhood-oriented plan has focused on redevelopment for larger, mixed-use buildings throughout.

### **General Land Use Findings**

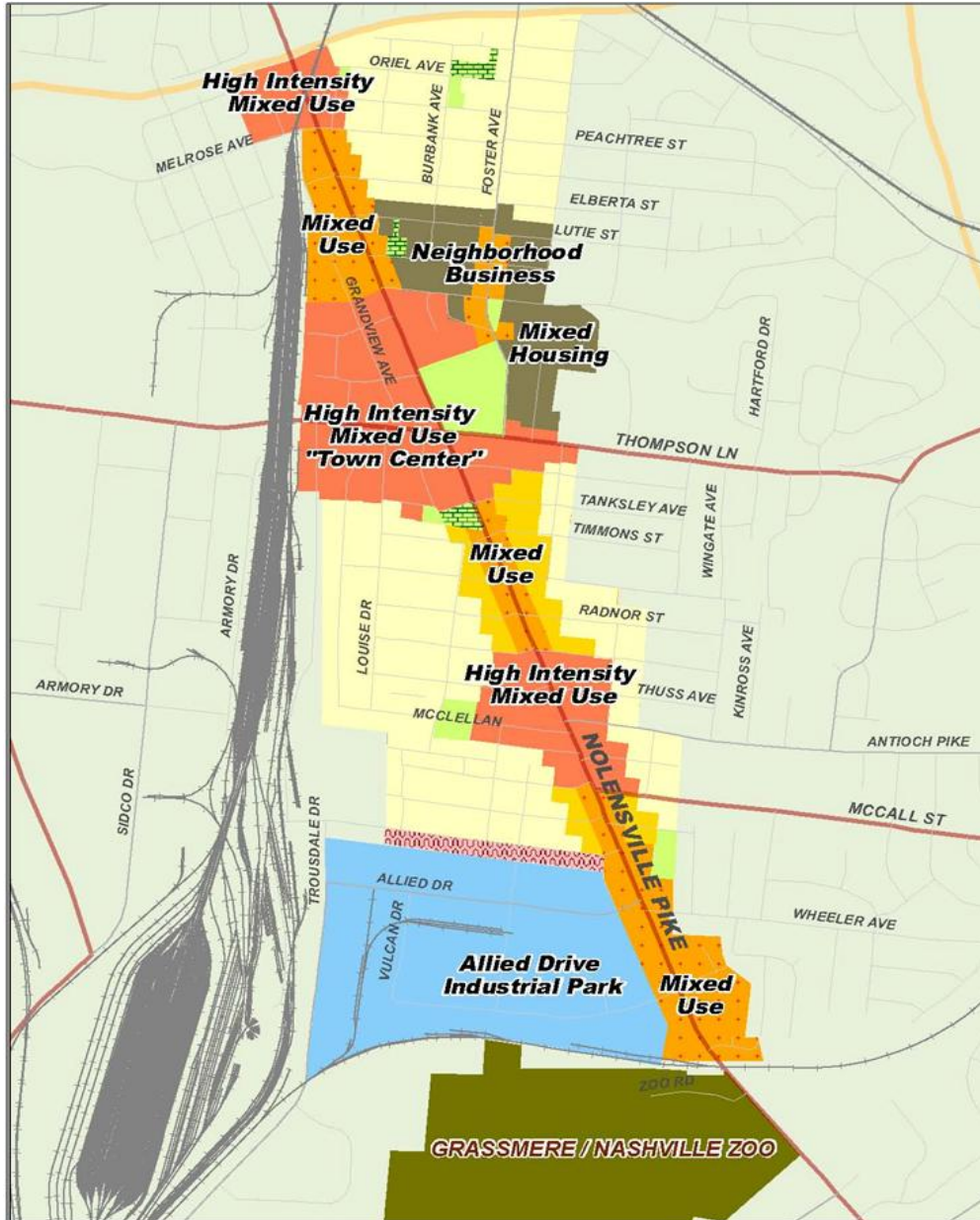
In general, the basic basket of land uses promoted in the plan is consistent with the market findings. These uses include retail/commercial, office, housing, industrial and various mixed-use products. The market analysis also assessed opportunities for lodging, audience support and other facilities, several of which are also incorporated into the market recommendations but which are not explicitly addressed in the DNDP. Conversely, the plans placed more focus on neighborhood housing areas and on open space, which are important components of a community but are not *market* uses.

**Housing Locations.** The key differences between the planned land uses and the market support for those uses relate to the scale and location of housing and office development within the DNDP study area. The plan correctly attempts to disaggregate the commercial corridor by integrating other uses, primarily upper-floor housing in mixed-use buildings with an allowance for ground-floor retail or office. However, the amount of housing that could be developed through this approach solely along the corridor is likely to exceed the market demand within the 20-year market horizon.



## Nolensville Pike Market Analysis

More importantly, somewhat more of the corridor than necessary is turned over to housing in linear buildings flanking Nolensville rather than creating “bulb-outs” of mixed-use communities around key walkable nodes such as Thompson Lane and Nolensville Pike. It is clear from the plans that residents of communities neighboring the corridor are intent on maintaining their low-density *suburban*



housing lifestyle and yet they are also requesting walkable *urban* neighborhood business districts. The conflict in these opposing market forces was raised adroitly within the DNDP but the issue remains.

The key concern underlying the housing assumption is ultimately the role of Nolensville Pike in the regional economy. If Nolensville Pike is really a neighborhood street that should provide neighborhood commercial districts with

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## ***Nolensville Pike Market Analysis***

businesses that are oriented mainly to the residents of the surrounding single-family neighborhoods, then the plans are indeed responsive to this concept. However, it can be argued that Nolensville Pike is a regional economic and fiscal generator, potentially a tourist destination, based on the market findings. If the broader community interest is to ensure that Nolensville Pike reaches its full potential, then there is a need to provide for redevelopment and expansion of retail/commercial uses, with housing focused in appropriate locations, within the International Corridor section of the study area.

The issue relates primarily to the location of housing. The DNNDP identifies an opportunity for mid-density housing surrounding Coleman Park. This is an excellent concept and conforms to the overall notion of higher-density housing surrounding major commercial intersections. However, the DNNDP also calls for an additional 18 new linear blocks of housing (nine blocks flanking either side of Nolensville to the north of the Thompson Lane/Nolensville Pike intersection) The intensity of housing on this section of the corridor will dilute the unique marketing strategy for the retail and reduce the destination market potential. Clearly, retail could still function on the ground floor of these buildings, so it's mainly a matter of emphasis and degree.

**Office Space.** Similarly, there is an issue with the scale and location of office uses within the corridor. Many of the recommended concepts in the DNNDP call of office as part of mixed-use buildings, including ground-floor office use. First, demand for office in the Nolensville Road study area is not so great but could be leveraged somewhat by the development of a new business node, such as at the Fairgrounds Site. The development of such a node will not generate more demand for office space south of I-440, where the market is driven almost exclusively by household consumers (in the form of banking and financial services, insurance agents, real estate, travel agents, etc). While there is some unmet demand for office space in the market, it is not clear whether the scale of office envisioned as part of mixed-use buildings can be achieved anytime soon.

More importantly, is the location for that office space that is of concern. Mixed-use buildings are wholly acceptable to accommodate office space, but offices should not be located on the ground floor of such buildings in a commercial district. This is especially true in what is envisioned as a "walkable" commercial district. Placing office space on the ground floor is a sure way to reduce street activity and create dead space. In fact, many cities require new buildings in designated business districts (especially downtowns) to have retail uses on the ground floor in order to avoid the accumulation of ground-floor offices. It is recommended that Metro Planning examine the possibility of implementing such requirements within specific, designated districts, such as along key streets within the Thompson Lane/Nolensville and Antioch Pike/Nolensville intersection nodes.

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## ***Nolensville Pike Market Analysis***

**Light Industrial.** While there is demand for industrial, the conservation of industrial use in small, physically-constrained pockets is not sustainable over the long term as these small pockets cannot support expansion. Thus, consolidation of industrial zones into larger areas is preferred where possible. The preservation of the light industrial area along/west of Grandview Avenue may fall into this category of unsustainability. At the same time, the plan's wise recommendation for establishment of a higher density mixed-use community node in the Thompson Lane/Nolensville Pike area could benefit from long-term opportunity for expansion into the Grandview area. This would also serve to take some pressure off of the residential neighborhoods on the east side of Nolensville Pike. Thus, the designation of this light industrial area as more of a mixed-use (industrial/commercial) area would help serve a longer-term purpose.

**Retail.** The DNDP has made significant changes in the long-term vision for retail space, at least by inviting new mixed-use development to replace existing retail buildings. This is appropriate so long as there is a strong design and business assistance consideration that helps to preserve the small, independent business context of the corridor. In many popular main streets and commercial districts nationwide, consumers often cite the presence of small, independent and unique stores (along with walkability) as the thing they like most about the place. Aside from chains, fast food restaurants, and used car lots, Nolensville Pike actually has a large number of mom-and-pop stores. These businesses can serve the large trade area, as well as destination shoppers and tourists. Every effort should be made to help these independent stores grow and survive and to attract more of them as an integral part of the corridor.

Typically, when new buildings are constructed, they raise the standard but also the rental threshold. Furthermore, many mom-and-pop businesses do not own their buildings. Thus, they are more likely to lose their lease in favor of a higher-rent-paying national chain. As a result, Nolensville Pike can be at risk of losing this unique asset through the redevelopment process if care is not taken to assist small businesses as a counter-balance. It should be emphasized that residents and commuters will tend to judge the business based on their premises rather than on the business itself. So, many small businesses that are operating out of poorly-maintained or less than attractive buildings may not be recognized by the community as the asset they are unless they are promoted and their sites is improved.

The concepts recommended in this report suggest that new, larger-scale mixed use development be concentrated within the designated nodes (at least in the near-term) and integrated with existing uses. By reserving the segments between the nodes for smaller businesses, there is the opportunity to preserve more of the "mom and pop" character of the business mix. Larger retail, business and civic uses concentrated within the key nodes helps to anchor the overall corridor and generate market spin-off in support of the smaller businesses that can thrive between the major nodes. Further, the CDC and Metro economic

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## ***Nolensville Pike Market Analysis***

development agency would provide assistance (training and capacity building, marketing, low-interest loans, façade grants, etc) to help strengthen these small businesses as discussed elsewhere in this report.

Vancouver, British Columbia and other cities provide excellent examples of small-business focused highway corridors, where one can see block after block of successful, independent small businesses anchored at nodes by larger uses. Alexandria (VA), America's first Main Street community and home to President George Washington, provides another good example of a business district anchored by larger stores but marketed overall for its small, unique and independent shops.

There are approximately 125 independent, non-automotive businesses operating out of retail spaces in the study area and another 50 independent, non-automotive businesses south of the study area to Harding Place. If automotive service and used car lots are included, then the number of independent businesses is much higher. A majority of these businesses serve a foreign-born market. Countries identified with these businesses include Mexico, Iran (Persian), Iraq (Kurdish), Turkey, Pakistan, El Salvador, Ghana, Laos, Costa Rica, Sudan, Thailand, Greece, Bangladesh, Colombia, China, Peru, Brazil, India, and Bolivia, among others. Some of the independent, non-automotive retail/service businesses in the study area are listed in the Appendix.

### **Consistency between Market Analysis and DNDP Recommendations**

The findings of the market analysis and marketing strategies were used to test the recommendations of the *South Nashville Community Plan* and the *Nolensville Corridor Detailed Neighborhood Design Plan (DNDP)* to determine where there is consistency versus a difference in recommendations. The plans' land use policy recommendations that were consistent with the market findings are delineated below, followed by the list of recommendations where there was some discrepancy with the findings of the market analysis and marketing strategies.

- Mixed-Use Corridor. The DNDP recommendation for a mixed-use corridor is consistent with the market findings.
- General Building Form and Design Standards. Key elements that are consistent with the market findings include
  - Creating more of a sense of place
  - Creating walkable pedestrian- & bicycle-friendly nodes
  - Creating better public transit access



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## **Nolensville Pike Market Analysis**

- Encouraging parking at rear (which helps to establish a more “walkable” commercial district that appeals to the destination market).
- Implement urban design program. Metro should have responsibility for implementing streetscape improvements in the public realm, as recommended in the plans. However, the marketing strategy recommends stronger, identity-oriented interventions rather than generic standards. These urban design improvements, along with private efforts (e.g., business signage) should be realized as a critical component of the identity marketing strategy and should also respond to the market concepts developed within specific nodes and districts. Key elements include landscaping, screening, lighting, signage programs (although the marketing strategy goes one step further to suggest direct design assistance from artists); gateways (strategy recommends much more detailed and specific to corridor marketing and nodes)
- Encourage redevelopment but at selected nodes rather than wholesale change. Caution is recommended to ensure that small, independent businesses are eased into new space and not gentrified out as they provide value to the overall destination marketing strategy.
- Gateway at I-440, recommended in the DNDP, is also recommended in the marketing strategy.
- “Woodbine-South Walkable Center.” The DNDP’s plans are relatively consistent with the market-based recommendation for a mixed use, high-intensity commercial node surrounding the Thompson Lane/Nolensville intersection. The marketing strategy goes somewhat further to encourage high-profile redevelopment at the intersection. The current brick crosswalk design is insufficient for this scale of commercial corridor and to enable destination marketing. This is not a “neighborhood” node; it is an “intersection of regional significance” with nearly 60,000 cars per day. The perspectives are technically proficient but do not convey the ideas of the marketing concepts (international context, higher intensity, role of small businesses, etc), since they had not been informed by marketing. The Sub-district 7 designation (mixed use community center) in the DNDP is appropriate, but expansion of this area into the neighboring light industrial zone to the west is recommended over the long-term to allow for more developable sites with growth in this mixed-use “downtown” node.
- Coleman Park Plan. The plan’s recommendation for housing surrounding an expanded park (on the west and north) is an excellent idea.

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## ***Nolensville Pike Market Analysis***

- Mixed Housing / Commercial at the southern end (Grassmere), designated as Sub-district 4 (mixed-housing community center) in the DNDP. This is consistent with the market findings. However, care should be taken to not use too much land for housing (see exclusion under inconsistencies, below).
- Antioch Pike Area Node in Radnor South. This node, designated – Sub-district 6 (mixed-use) in the DNDP is consistent with the market findings and marketing recommendations. The marketing strategy has included redevelopment for a destination market node as a key anchor for this area.
- Celebrate Historic Character. It is also important to examine the vintage 1950s/1960s character of this corridor's architecture and look at conservation approaches. The 1950s/60s era has a design vernacular that is being rediscovered for its unique character. Highway corridors like Route 66, US1, and others have started to preserve and rehabilitate the buildings worthy of recognition. Of course, there is a lot of redundant, poorly-built and maintained, non-exceptional architecture in Nolensville Road as well. The key is to engage a detailed survey before allowing wholesale redevelopment for this reason as well as for protecting the small business character for marketing and economic purposes.
- Plazas and more open spaces. Ideally, the Colman Park site would include an even more active element (such as a formal plaza) but this may not be possible.
- Mixed-Use Node on Foster. This is logical, but care should be taken not to allow more than neighborhood-serving retail or else competition will form between the main corridor and neighborhood nodes. Otherwise, this concept helps provide a grid to distribute traffic and provide convenience for neighborhood uses away from the major corridor.
- Encourage redevelopment of strip malls into mixed-use. This recommendation is consistent with the marketing strategy. However, there are not that many "strip malls" in the study area. By comparison, there is much more space in small buildings on small, shallow parcels. It is easier to redevelop a strip mall than to assemble an appropriate set of small buildings on separate parcels that may have some asset value for small business or corridor marketing.
- Retail that caters more to neighborhoods. The market analysis did find that the market is under-served for convenience uses and this has been accommodated in the overall recommended program. However, the larger opportunity relates to the much larger trade area household base beyond the immediate neighborhoods, to destination marketing, and to diversifying

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## ***Nolensville Pike Market Analysis***

the mix of shopper's goods, restaurants, and entertainment. This approach is also accommodated in the recommended plan. Some pressure for walkable neighborhood "hang-outs" will be relieved through the development of a mixed-use node on Foster, so perhaps adjacent community needs can be satisfied through a combination of the two. Again, this relates to the question of what role Nolensville Pike should play in the region.

### **Differences between Market Analysis and DNDP Recommendations**

- **Nodes versus Segments.** Wholesale redevelopment of the entire corridor as a walkable community is neither feasible nor appropriate, from an economic perspective. Focus redevelopment instead on expanded nodes with higher design standards and infrastructure improvements that encourage walkability. For the linear segments between the nodes, provide basic pedestrian facilities but do not encourage wholesale redevelopment. Rather, develop tools and incentives to encourage the private sector to enhance property conditions and appearance throughout the corridor.
- **Mixed Housing Designations.** Overall, there is too much housing concentrated within the narrow commercial corridor. Yes, mixed-use at the key nodes is important and is consistent with the market findings, but there is a need for "bulb-outs" of mixed-use development (where additional land beyond the depth of one property is used for mixed-use development) at these nodes rather than linear mixed-use development throughout the corridor. There is an inherent conflict between the desire of neighborhood residents to maintain their suburban way of life (in terms of their housing) and their desire for urban amenities.
- **There is a need for more protection of the unique character of the corridor and its small businesses, achieved by allowing small buildings in key areas, rather than redevelopment into large parcels throughout the corridor.** New buildings will create a different environment completely as they are much more likely to include the Starbucks that neighborhood residents want but that can also contribute to a preponderance of chain uses which can afford to pay higher rents for new space. There is not a proven market for non-destination, ground-floor retail in all of the blocks designated for Mixed Housing policy in the DNDP.
- **Discourage Auto-Oriented Uses Near Neighborhoods.** The market findings suggest that, aside from drive-through uses (which are discussed in the DNDP), there is also an oversupply of auto-oriented businesses (like used car sales, automotive repair, etc). A preponderance of such uses, as with drive-through retail, can also impact negatively on adjoining residential neighborhoods. The marketing strategy recommends

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## ***Nolensville Pike Market Analysis***

- redevelopment at strategic locations to diversify the retail mix away from a dependence on auto-related uses.
- **Woodbine North Walkable Center:** The recommendation for MH Mixed/Housing (Sub-district 4) at I-440. While it was not meant as a “walkable” center in the DNDP, the title mistakenly suggests that this interstate interchange has been designated as such. Walkable districts should be created at other key nodes (i.e., the broad area surrounding the Thompson Lane intersection). While it would be costly to extend *major* urban pedestrian infrastructure improvements along the entire length of Nolensville Pike, basic facilities (sidewalks, crosswalks, planting strip, and transit stops) should be provided throughout the corridor. Encouraging first-floor offices is not a good idea, especially for a “walkable” commercial district, as this creates dead space. As noted above, there is no proven demand for all of the ground-floor retail space created in the Mixed Housing blocks since the destination market is not as easy to achieve through this strategy.
  - **Radnor North Walkable Center.** It is important to break up the monotonous commercial sprawl, but the amount of Mixed Housing conceptualized at this location may be one or two blocks too much, given the market findings and marketing strategy. Mixed Housing and mixed-use redevelopment should be encouraged where existing uses are already in suburban pad sites, allowing for an increase in density. Replacing densely-packed small retail businesses does not generate the same benefit. This is another example of the need for a “bulb out” and cluster located around node. The marketing strategy has also recommended a cultural center within this area (rather than housing), but there is flexibility in the concept, which has not been tested.
  - **Consider transition of the light industrial area (Grandview) to a mixed industrial/commercial.** Light industrial (Sub-district 10 in the DNDP) is not well-located here for the long-term, if the nearby node is expected to expand and densify, altering the character of the area. Currently, existing businesses do like this central location, but a change in character with more commercial traffic will change their operating conditions. Allow for expansion of the mixed-use node west of Nolensville Road. This will allow for larger-scale redevelopment and a walkable town center environment.
  - **Mixed Housing/Commercial Center (Timmons Street to Thuss Avenue).** Again, perhaps too much land for housing is promoted by the plan given the housing market and destination retail marketing considerations.
  - **Mixed Housing at Southern End / Grassmere.** As noted above, the concept is consistent with the market analysis, but only on the east side of Nolensville Pike. Housing should not be developed on the west side at the



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## ***Nolensville Pike Market Analysis***

base of Allied Drive Industrial Area. This is a viable industrial area that extends further west and there is a need better define and formalize it. This area may be appropriate for office/commercial, including zoo-related or other retail at the railroad overpass.

- Generic versus destination market-oriented. Nolensville Pike is envisioned as a destination marketplace and already has a concentration of small destination uses. It is not a question of whether to have Starbucks rather than an Egyptian coffee house. The corridor can potentially support both. But identity marketing, urban design driven by the marketing strategy, support of existing business and recruitment of new business is critical for building that market. Among the critical lessons learned from other commercial districts: adjoining residential neighborhoods will be more likely to get the uses they want if a destination market is captured to support a broader mix of businesses. Overall, this harkens back to the conflict of perceiving regional corridors as “neighborhood” serving rather than destination-oriented. Nolensville Pike does serve the community but also has significant regional impacts on economic development, commutation, and fiscal health. There is a need to differentiate between neighborhood commercial district main streets, which may be a few blocks long, and a regional traffic corridor.

### **Other Key Planning & Redevelopment Issues**

Other planning issues were identified with respect to zoning and land use controls, lot sizes, and other concerns affecting the viability of the *South Nashville Community Plan* and the *Nolensville Corridor Detailed Neighborhood Design Plan* (DNNDP) for redevelopment.

### **Zoning & Auto-Related Land Use Controls**

The corridor is dominated by CS Commercial Services and IWD Industrial Warehouse/Distribution zoning typologies although the *Community Plan* and *Nolensville Pike DNNDP* provide a framework for policy guidance oriented to mixed-use “walkable” centers. Specific Plan (SP) zoning provides a “design-based” zoning district in which the land uses and the built form of development are guided by the *Community Plan* and *Detailed Neighborhood Design Plan*.

The SP zoning offers an opportunity to place greater controls on land use and the form of development. The SP zoning district requires a site plan, which is evaluated per the *Community Plan* and the *Detailed Neighborhood Design Plans*. On the surface, this tool would seem to be useful in controlling the number of less desirable uses, as defined by the community. For example, in 2006, the Metro Council adopted an ordinance that required used car lots and other auto-related uses be permitted only through an “Auto-SP,” in part to limit these uses (which were perceived to be detrimental to the community). There is the need to

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## ***Nolensville Pike Market Analysis***

control the proliferation of used car lots, which impact the visual appearance of the corridor and reduce its economic and fiscal returns when compared with alternative, higher-density commercial uses. When coupled with auto service uses and automotive parts supply the preponderance of auto-related uses crowds out other types of retail and limits the ability of commercial or mixed-use zoning to serve community needs.

Auto-SP zoning could be used to control auto-related uses if an application is made to open a *new* used car lot. However, while Auto-SP zoning helps keep the number of lots from continuing to expand at certain locations, it does not solve the existing problem of an over-population of these and other auto-related uses throughout a miles-long corridor.

The solutions, outside of re-zoning the corridor, can relate less to regulation and more to redevelopment, marketing, and business development. For example, the marketing and development strategy has recommended that redevelopment be focused where there are already low-density suburban-style pad sites and used car parking lots (and where new uses would be most marketable, of course). Several of the sites recommended for key mixed-use nodes or anchor uses in the strategy actually have among the highest concentrations of used car lots and lower-density commercial uses in the corridor. “Carrots and sticks” for redevelopment have been recommended that engage with the property owner rather than merely regulating them.

Marketing of and anchoring the corridor for destination uses will help to build market pressure on non-related uses like used car lots. Car lot owners will be more likely to consider selling their property if the values are increasing and the relative return from selling is higher than from operating or leasing at that location. Further, business development approaches have been recommended that focus on diversifying the existing business mix and recruiting new businesses to populate the corridor. This will also have the effect of engaging with the property and business owners in order to effect change.

**Land Use and Zoning Policy within Nodes.** It would be most beneficial if land use policy changes followed the recently adopted Community Character Manual (CCM). Recommended land use policy according to the CCM for the nodes identified in the market analysis might range between T-4 Urban Mixed-Use Corridor in the least intense scenarios to T-5 Regional Center for the most intense scenarios or scenarios that incorporate large footprint regional draws such as an “international market.” Adjacent to the nodes, T-4 Urban Mixed-Use Neighborhood zoning is recommended as a transition to the surrounding residential neighborhoods.

It is recommended that implementation of the land use policy be accomplished incrementally at each node through Specific Plan (SP) zoning and in conjunction with improvements to the public right-of-way. The development

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## ***Nolensville Pike Market Analysis***

regulations accompanying the plan must balance the goal of creating an urban, pedestrian-friendly, mixed-use environment with the goal of preserving and enhancing the eclectic character of the Nolensville Pike International Corridor. SP zoning can foster this balance through site-specific standards that take into account existing conditions.

Gateways, special pavement, public art, and other “higher-level” specialty design treatments should be utilized to provide unique identities for the key nodes along the corridor:

- **Gateways.** One of the most effective ways of differentiating the nodes is through the provision of gateways. Gateways can be provided through a variety of features including, but not limited to signage, landscaping, signature building, lighting, pavement, and public art.
- **Special Pavement.** Special paving makes up the floor of the sought-after “outdoor room” within the public right-of-way. Special paving is an essential element of pedestrian-friendly design, and can be important in creating a distinctive character for the key nodes. Bricks, cobbles, precast pavers, and patterned concrete cannot compensate for otherwise poorly-defined street space, but they do serve as a significant element in creating character and a unique identity for key nodes along the corridor. Such treatments would be extended throughout the nodal districts created through extension of the street grid and through “build-outs” in development east and west off of Nolensville Pike within these nodes.
- **Public Art.** Some of the best urban spaces that are well-defined by buildings or other vertical elements may be characterless. Public art within nodes (and perhaps extended throughout the International Corridor segment) along the corridor can go a long way in giving meaning to places by making associations with the past (such as the industrial heritage of the Chestnut Square area), commemorating people and events, adding ethnic and cultural decorative richness (within the International Corridor), celebrating the natural environment (such as in the Zoo node), or introducing whimsy and humor.

**Land Use and Zoning Policy between Nodes.** In order to transform the areas between the nodes into a coherent pattern of lower-density commercial, mixed-use, and residential developments that build on the unique and eclectic characteristics of the corridor, Metro is encouraged to develop a plan of action. The following recommendations outline the steps that should be taken to develop and implement an action plan that will help preserve the “mom and pop” stores that contribute to the character of the International Corridor segment of the study area, while balancing the need to improve the pedestrian-friendliness of the street.

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## ***Nolensville Pike Market Analysis***

The predominant CS (Commercial Services) zoning leaves property owners in sections located between the nodes with limited use options and thus can be seen as a barrier to reinvestment. Land between the nodes should remain zoned for lower-density commercial uses, but the zoning should be expanded to permit residential uses by right. The zoning along segments should permit a wide spectrum of uses at a lower intensity than within the nodes and provide a policy framework that ensures that the various uses will interact gracefully. If implemented through a form-based code, development should be organized and regulated by node and segment, with regulations that enforce the necessary anatomy of segments and nodes, in which case, use becomes secondary.

The entire corridor should be designed so that people can easily walk between nodes or centers and segments, and they should be able to do so frequently. People should also find it natural to walk, sit, and meet along the corridor. The following should be considered at a minimum when developing a streetscape plan for the entire length of Nolensville Pike through the study area.

- **Make Segments Comfortable for Pedestrians.** Provide continuous sidewalks along the entire corridor. Design sidewalks to correspond with adjacent uses, intensities, and marketing concepts. Buffer pedestrians on sidewalks from passing vehicles with on-street parking as well as a wide furnishing zone or landscape strip, planted with uniform street trees. Provide street lighting at both the roadway and pedestrian scales to increase safety and activity at night. Enhance pedestrian crossings with alternative paving, signage, and push-button signals. Screen dead spaces and visible parking with a consistent treatment such as a wall combined with landscaping. The City of Franklin has provided a good model for consistent screening along Columbia Ave near downtown (see photograph below).



- **Access Management.** Appropriate circulation and access features are critical elements along the segments in order to make the corridor more walkable between nodes. Metro should create and fund an access management incentive program to retrofit existing development within the segments. Metro Planning should work with TDOT and the MPO to



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## ***Nolensville Pike Market Analysis***

develop an access management plan for the corridor, concentrating on opportunities to access parking lots from rear alleys or side streets. This will allow fewer interruptions for pedestrians, along with more attractive front yards and sidewalks along the street frontage. The plan should also identify opportunities for driveway consolidation and provide recommendations for appropriate signal controls and signage, as well as restrictions and controls on left-turn movements.

- **Visually Differentiate New Patterns for Nodes and Segments.** Street design should deliberately emphasize the differentiation, functional needs, and special marketing character of each node and segment. Each segment should have its own type of uniform street trees, streetlights, landmarks, and expressive landscaping between segments. The segments should be designed to produce an unfolding sequence of experiences that benefits wayfinding, corridor identity, and the increased appeal of properties along the corridor.
- **Design for Transit Riders.** Transit infrastructure should be installed in anticipation of new medium-density development along the segments. Nolensville Pike should be designed to accommodate the transition from local bus to express bus and bus rapid transit (BRT) and perhaps ultimately to fixed-rail transit. New street designs should include at a minimum: pedestrian space, transit stops, waiting areas, and transfer points.

### **Lot Depth & Expansion**

For redevelopment purposes there is a need to assemble parcels. However, many of the commercial properties in the corridor are historically small. This is beneficial in those areas where a healthy mix of small businesses can be nurtured to create special destination districts. However, redevelopment at key nodes will need additional land in order to create destination opportunities. The constraint placed on east-west expansion of the commercial zoning in the corridor is problematic for the reasons given. At key locations, there is a need to refine the *Community Plan* and *DNDP* to focus on opportunities for node development.

It is important to remember that enhancing the small business character of Nolensville Pike is essential to marketing and economic development in this corridor. As such, care should be taken to avoid encouraging wholesale redevelopment of large segments of the corridor, given that it would drastically change the building patterns and space available for small, independent businesses. Small buildings and urban format centers that may be perfect for certain small businesses and for marketing this niche should not necessarily be replaced with larger-scale buildings as conceived in the plan.

### **Building Format & Parking**

Several recommendations are made to help guide planning policy with respect to building format, infill development and parking. First, efforts should be made to preserve existing buildings that contribute to the eclectic character of Nolensville Pike and integrate those buildings into new development, whether by building above the existing structures or building new structures that utilize the facades of existing buildings. In general, new infill development should front and frame the street to foster a pedestrian-friendly environment; however, some flexibility in building placement is encouraged. For example, a setback zone rather than a build-to line would allow flexibility for buildings with elements such as outdoor dining or new infill development that is incorporated into existing buildings and facades.

**Within Nodes.** Multi-story, mixed-use buildings are encouraged, especially within the key nodes; however, accommodations should be made for varying building heights given the existing character along Nolensville Pike (from one to ten plus stories currently). Regardless of maximum building height, buildings that establish a strong presence at street-level should be prioritized. In mixed-use buildings, retail uses should be favored at street level over office uses. Slightly taller street-level stories will encourage and accommodate commercial uses.

Structured parking with opportunities for shared parking between blocks is encouraged to accommodate the intensity of development typical of dense, mixed-use nodes. Parking ratios should, at the very least, follow the standards of the Urban Zoning Overlay (UZO), and perhaps be further evaluated to determine additional efficiencies with shared parking. Parking should generally be located to the rear of buildings and accessed by a network of service lanes; however, there may be some instances where parking is located to the side of buildings as long as it is screened from the fronting street and does not interrupt the pedestrian network.

It is encouraged that regulations not be overly restrictive with regard to the architecture of redeveloped and new infill in order to preserve and enhance the eclectic character of the corridor. Architecture that reflects the multi-cultural character of the International Corridor segment of the study area should also be encouraged wherever possible, as a way to enhance destination marketing.

### **Lack of Nolensville Pike Transportation Plan**

There is a need for a transportation plan integrated with, or informed by, the *Community Plan* and other policy documents for this corridor. This is a deficiency, given that Nolensville Pike is a major highway corridor and there are critical questions that remain to be addressed with respect to the roadway design itself (as opposed to urban design improvements in the rights of way). There is

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## ***Nolensville Pike Market Analysis***

the opportunity to vastly improve the walkability and appearance of this corridor through the creation of boulevard infrastructure. The traffic implications and testing of such alternatives should form part of a transportation plan for the corridor, along with assessment (and integration) of alternative modes including mass transit (i.e., streetcars). Key components of a transportation plan would also include the following:

- An improved cross section for Nolensville Pike that accommodates current and future traffic volume and transit as well as fostering a pedestrian-friendly environment should be a crucial component of the plan.
- In order to create “bulb-outs” of mixed-use development, it is important to examine the street grid and identify opportunities for new streets and service lanes to increase connectivity around the nodes.
- On-street parking is an important element for all streets because it creates a buffer for pedestrians and provides up-front parking for street level retail. Parallel on-street parking should be implemented as part of an improved Nolensville Pike cross section. Where possible, diagonal head-in parking should be implemented on side streets adjacent to mixed-use and higher density residential development as it occurs.
- A new Nolensville Pike cross section should envision and plan for future streetcar/light rail service. At the very least, accommodations should be made for bus pull-offs at important transit stops along the corridor.

Again, the issue of the purpose of the road as a major commuter route and traffic corridor has been lost in the discussion about walkability. The road must still serve as a road. Nolensville Road is not just another street. It is a regional highway with up to 75,000 cars per day and commuter traffic, a major commercial corridor. It is not only a “neighborhood serving” location but a highway of regional significance with potential for attracting even more destination traffic.

Certainly there is a need to enhance walkability throughout the corridor with basic urban pedestrian facilities, but there is also the need to create walkable districts around key nodes with a higher level of urban “identity” streetscaping and pedestrian infrastructure. By expanding these nodes, traffic and pedestrian activity can be dispersed onto an adjacent “grid” of commercial streets, helping to create a safer, more pedestrian-friendly environment off of the main highway corridor.

### **Summary**

This section has provided a brief review of the *Community Plan* and the *Nolensville Pike DNDP* in particular, in light of the market findings. In general, the marketing strategy is largely consistent with the basic land use and building forms recommended in the plans. The development of mixed-use nodes is important to the community and also responds to market demand. Key marketing

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## ***Nolensville Pike Market Analysis***

issues with the DNDP relate to the overall function of the road and the apparent conflict between perceiving Nolensville Pike as regional destination versus a neighborhood-oriented street.

The marketing and development strategy does agree with the DNDP that the overall walkability of the street needs to be improved, especially within key nodes: basic urban pedestrian facilities (sidewalks, crosswalks, planting strips, signage) should be improved along the length of Nolensville Pike, with enhanced pedestrian facilities and “identity-“oriented streetscaping, complemented by building design improvements, at walkable centers.

At issue are the type and scale of uses at certain locations given the community’s desire to focus all redevelopment within the commercial corridor and prevent expansion into residential neighborhoods. In order to maximize the potential for all uses, the marketing strategy recommends capturing growing trade area markets as well as destination sources, through unique identity marketing, design, and development strategies that focuses on anchor projects and expanded mixed-use nodes that may expand into residential areas at certain “bulb outs.”

The policy direction of using linear housing blocks and office space throughout the corridor may over-shoot market demand for these uses, at least within the 20-year market horizon. Certainly the policy recommendation for ground-floor offices should be revised as this will reduce the street vibrancy of any commercial district. Meanwhile, there is destination retail, entertainment, eating & drinking, and cultural venues for which there is unmet demand.

Use of SP zoning to control unwanted uses lacks strength in reducing the current problem of an over-supply in auto-related businesses. That issue can be attacked more effectively through targeted redevelopment, marketing and business development.



## **Section 4. SUMMARY STRATEGIES & IMPLEMENTATION ACTION PLAN**

This section provides strategy summaries for development, management, marketing, financing, and economic development in the study area. Most of these “big-picture” strategies have been identified in Sections 2 and 3, but are summarized here for clarity. The programs and policies, as well as the specific recommendations for development and marketing, are translated into a three-year Action Plan for implementation following this summary.

### **Marketing & Development Concepts**

Marketing concepts and overall strategies were introduced in Section 2 of this Volume 1 Report. Specific marketing elements or tasks would become the responsibility of the individual organizations identified above, namely the Nashville Artisan Industrial Business Organization (NAIBO), Fairgrounds Green Gateway Redevelopment Authority and the International Corridor BID or CDC. These organizations would appoint committees responsible for developing and implementing marketing plans. A summary of overall marketing concepts and strategies is provided below.

- **Nashville Artisan Industrial Business Organization (NAIBO).** Designate the area between the I-65 Inner Loop and the Fairgrounds Site as an artisan industrial hub with a focus on hand-made / artisanal, green, design-oriented, unique, and light-industrial business development. NAIBO’s (the organization’s) mission would extend beyond this area to brand, promote, and market the city’s artisanal products and represent local producers. Ultimately, an objective would be to attract and grow artisanal industrial businesses within this district. Three individual districts are recommended within this area that would have separate planning, development, and marketing considerations but would fall under the management of NAIBO.
- **Fairgrounds Green Gateway Business District.** Create a new business/mixed-use hub at the Fairgrounds Site and market this site as a location for prospective corporate relocations and other business development as defined in the market findings. Define more formal industrial/business parks in existing industrial areas (Rosedale and Interstate Boulevard) as well as more attractive commercial nodes in the “Gateway” area between NAIBO and I-440 to leverage a more substantive economic development node starting at I-440, beyond just the Fairgrounds Site. As part of this concept, a site in the I-440 commercial district might be marketed for a hotel.

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## ***Nolensville Pike Market Analysis***

- **Futbol City Sports & Entertainment Node.** There is the opportunity to create a destination sports and entertainment node in the corridor area that would feature a soccer stadium (as home to the Nashville Metros and various leagues), a Family Entertainment Center, destination concept sporting goods store, and food/retail. This complex could become a regional destination and visitor attraction, particularly if the stadium supports regional and national amateur league competitions. A potentially ideal location for this concept is at the Fairgrounds Site, but the highest and best use for that site over the long term (in terms of private investment) is more likely to be a business node. Perhaps another site can be found further south within the Nolensville Pike Corridor for this project concept. However, the more central the better for destination sports/entertainment.
- **International Corridor.** The area of the corridor between I-440 and Grassmere / Nashville Zoo, and continuing south past Harding Place, would be designated as an identity marketing district known as the International Corridor in recognition and celebration of its competitive assets, business mix, and growing market base. Integration of new businesses to strengthen the destination as well as convenience components of the mix is recommended based on the market findings. The corridor would be disaggregated into several individual marketing districts, namely Woodbine / Madreselva and Radnor (or Glencliff) within the study area. Several nodes within these districts would be designated to help create specific anchors and identities for marketing. The Flat Rock node, the Thompson Lane-Nolensville Pike Community Hub (which would include a new, higher-density mixed-use project), NolensVilla International Marketplace, International Cultural Center, and Allied Drive Industrial Park. Marketing would include a large annual event with regional appeal, urban design improvements oriented to the International Corridor theme, various promotions and identity branding, and development of web site and other communication devices, among other mechanisms.
- **Zoo District.** Creation of a marketing and development node surrounding the Nashville Zoo is recommended to leverage the large and growing tourism market generated by the Zoo. This node would feature zoo-themed restaurant, retail and (over the longer-term) possibly a hotel (which would need to be further tested in the market).

### **Overall Management**

The management strategy focuses on primary engagement by several Metro Government agencies in initial implementation, regulatory enforcement, redevelopment incentives, and capital infrastructure improvements throughout the study area. An alternative would place some responsibility for redevelopment

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## ***Nolensville Pike Market Analysis***

specifically within the Fairgrounds Green Gateway area with an independent authority having a sunset clause.

The ongoing operational management strategy focuses on possible creation of three new permanent organizations, one (NAIBO) to guide marketing and promotion for an artisan industrial district and products; the second a BID or business organization to help manage industrial parks; and the third a BID or CDC to help manage economic/re-development and added services within the International Corridor. The following summarizes overall roles. More specific explanation of each task and responsible agents follows after this section:

- **Metro Government Agencies** would have responsibility for the following:
  - Implementation Start-Up (includes public education as well as facilitation services). Metro agencies would help engage key private stakeholders (property owners, business owners, non-profit organizations, community leaders, council members, and collaborative agencies) on specific elements of the strategies, such as creation of NAIBO or redevelopment around the Antioch Pike/Nolensville intersection, for example.
    - Metro Planning
    - Mayor's Office of Economic Development
    - Metro Arts Commission
  - Planning/Zoning and Regulatory Enforcement
    - Metro Planning
  - Redevelopment Incentives
    - Mayor's Office of Economic Development
    - Metropolitan Development and Housing Agency (MDHA)
  - Capital Infrastructure Improvements
    - Metro Planning
    - Metro Public Works
    - Metro Council
    - Mayor's Office
- **Alternative (for Fairgrounds / Gateway Area only):**  
**Fairgrounds/Gateway Redevelopment Authority** would have responsibility for the following
  - *All of above, but only within the Redevelopment Area*
  - *Communications (e.g., Media)*
  - *Subject to Sunset Provision*
- **Nashville Artisan Industry Business Organization (NAIBO)** would have responsibility for the following:
  - Marketing Plan
  - Product Branding
  - Marketing and Business Recruitment

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## ***Nolensville Pike Market Analysis***

- Communications, Liaison to Metro, Businesses, Residential Community, Media
- **International Corridor Business Improvement District (BID) or Community Development Corporation (CDC)** would have responsibility for the following:
  - Provide regular cleaning, maintenance, security, capital improvements services (BID)
  - Marketing Plan
  - Marketing and Business Recruitment
  - Redevelopment (CDC)
  - Business Assistance / Consulting, Training, Entrepreneurial Development (CDC)
  - Communications; Liaison to Metro (and Intermediary between businesses, residents, and Metro Government; Media (CDC))

A Redevelopment Authority, if created, would have a board appointed by the Mayor / Council with membership including Metro Planning and Metropolitan Housing & Development Agency (MDHA) as oversight, plus major corporate interests, financial institutions, community liaison, and large industrial businesses as well as small business from the area.

A sample CDC Board would include the following:

- 3 large and small businesses in the corridor,
- 1 ethnic/foreign chamber or business association (rotating),
- 1 neighborhood/community organization (rotating),
- 1 Metro Planning,
- 1 MDHA/Economic Development,
- 1 Councilmember (rotating),
- 1 financial institution, and
- 1 corporate or foundation sponsor

This structure recognizes and incorporates existing international business associations (which include two Hispanic business chambers, an African business organization, and perhaps others); as well as existing neighborhood organizations (that are mainly resident-based).

### **Economic Development & Financing**

Economic development would be driven by the designated organizations as outlined above, namely NAIBO (Nashville Artisanal Industry Business Organization), the Fairgrounds Green Gateway Redevelopment Authority, and the ICCDC - International Corridor Community Development Corporation (or BID as appropriate). However, Metro would have primary responsibility for enabling basic fiscal, financial, economic development and regulatory incentives and for



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## ***Nolensville Pike Market Analysis***

leveraging infrastructure development through the TIF, land assembly, infrastructure financing, and other mechanisms as appropriate. A summary of the responsibilities and policies is provided below.

- **Metro Government** would have responsibility for:
  - Infrastructure financing
    - Tax Increment Financing (TIF) District, to be designated for the Fairgrounds Site and the adjoining Fairgrounds Green Gateway improvements, possibly extending to include boulevard roadway improvements into the International Corridor. Responsibility: MDHA.
    - Urban Design and Streetscape Improvements within the International Corridor, such as through T2 funds, extension of the Fairgrounds Green Gateway TIF or State Government grants. Responsibility: MDHA, Metro Planning, Metro Public Works, and Metro Arts Commission.
  - Creation of a “Great Streets” program (see case studies) modeled after Washington, DC’s that would focus on upgrading and redevelopment within key commercial corridors. The program would designate redevelopment zones in these corridors based on strategic plans while offering a mix of fiscal, regulatory and economic development incentives along with infrastructure improvements to leverage private investment. However, a key missing element in Metro’s corridor planning is direct involvement by a designated transportation agency with direct responsibility for transportation project implementation. There is a need to access federal funding for transportation-related improvements in the corridor. Given the current federal emphasis on mass transit, it is essential that transportation planning examine mass transit opportunities, particularly in corridors like Nolensville Pike. (Responsibility: MDHA, Metro Planning, Metro Public Works, and Metro Arts Commission).
  - Targeted Fiscal Incentives for this International (and possibly other) commercial corridors such as through a Great Streets program. Such incentives might include:
    - Property tax abatements or roll-backs for redevelopment of properties consistent with the Community Plan and recommendations in this report (where designated contents are approved as part of a policy document).
    - If not enabled through legislation, then payment in-lieu-of tax (PILOT) arrangements that effectively reduce the tax paid under certain circumstances.

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## ***Nolensville Pike Market Analysis***

- Other fiscal incentives such as tax freeze on new development at previous assessed values for a period of time.
- Use of BIDs in the International Corridor (and possibly within industrial parks). A BID is not really an “incentive” per se, but rather a tool that enables business districts to self-finance an added layer of services. Thus, there is no direct cost to Metro Government.

Responsibility for enabling these incentives would be driven by the Mayor’s Office of Economic Development and the MDHA.

- Targeted Financial Incentives
  - Negotiated incentives for corporate relocations to the Fairground Site and adjacent areas within the scope of Metro policies. Responsibility: Mayor’s Office of Economic Development and the Nashville Chamber of Commerce.
- Economic Development Tools & Incentives
  - Existing County ED programs
  - Business development assistance, e.g., low-interest loan programs
  - Assisting in Creation of an International Corridor BID through communications with property owners and businesses in the Corridor and enabling legislation.
  - Assisting in Creation of an International Corridor Community Development Corporation (ICCDC) (if not a BID), with funding from Metro CDBG grants.
  - Assisting in Creation of a Nashville Artisan Industrial Business Organization (NAIBO) by inventorying, identifying and contacting businesses to participate. (The consultant can initiate this process.)

Responsibility for enabling these incentives would go to the Mayor’s Office of Economic Development and the Nashville Chamber of Commerce.

- Land Assembly
  - Land Assembly. Whether or not Metro chooses to use its powers of eminent domain for economic development purposes, Metro Government can pursue alternative approaches for land assembly based on carrot-and-stick, land swap, and negotiated equity participation approaches.
    - Carrot-and-stick: Metro could designate the International Corridor (such as through a Great Streets program) as a special redevelopment district where fiscal and regulatory incentives (see above) are enabled by redevelopment according to Metro

- objectives to balance the effect of the regulatory approvals process and basic enforcement.
- Land swap: Metro can enable a policy of land swaps that provide opportunities for relocation of businesses that are otherwise unwilling to move from a potential redevelopment site. Metro would work closely with developers involved in direct negotiations with property owners or would enable this policy as leverage to help attract developers (or CDC involvement) in targeted redevelopment.
  - Negotiated Equity: Metro can use hands-on facilitation to work with property owners in coordination with developers/CDC to ensure an equity position in new projects for businesses that must relocate. For appropriate existing businesses, this negotiation would also involve incorporating them into the new project (e.g., incorporating the Walgreens at Thompson Lane into a mixed-use development, although the issue there being that Walgreens only recently opened there).
- **Nashville Artisan Business Organization (NAIBO)** would have economic development responsibility for:
    - Organizing the district's and city's artisan industrial businesses
    - Developing branding policies for NAIBO member products and services.
    - Marketing and promotion of area products and services, from the base in the NAIBO district.
    - Business assistance and networking that helps to increase synergies
  - **International Corridor BID or CDC** would have economic development responsibility for:
    - Redevelopment of specific sites or nodes in partnership with property owners, private developers, and Metro (e.g., for land assembly and infrastructure).
    - Business and entrepreneurial development, through training and capacity building, grant writing, and accessing US Small Business Administration grants and loans

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## ***Nolensville Pike Market Analysis***

- Marketing and promotion of the Corridor as a regional destination.
- Organizing and managing annual events for the promotion of the Corridor and its businesses.
- Working with the Nashville Zoo on opportunities for development of an associated business node.
- Lobbying / representing the Corridor to government agencies, Police, and others (and working with businesses and consumers) to resolve conflicts that harm economic development within the Corridor.

### **Planning and Regulatory Implications**

Based on the review of the *South Nashville Plan* and affiliated *Nolensville Road Plan DNDP* in light of market findings, recommendations have been made in response to the planning policy documents. There is consistency between the DNDP and the marketing strategy with respect to overall land uses and the creation of mixed-use nodes at key locations. However, the strategy provides a broader trade area and destination-oriented approach to marketing and development based on the role of the road in the regional economic and development context. Genericism should be avoided in terms of urban design, which is a tool for identity branding and marketing. There is an issue within adjoining residential neighborhoods with east-west expansion at key nodes, but this may be the best way to accommodate growth. Removing commercial uses in favor of housing and office uses is fine to a point, but the scale should be considered within the market realities or redevelopment will become infeasible. The SP zoning tool helps keep out certain new uses but does little to control the existing problem of over-population of auto-oriented businesses. The best approach for controlling those uses is through redevelopment, marketing, and business development to diversify the land use mix in the corridor.



**IMPLEMENTATION ACTION PLAN**

## ***Nolensville Pike Market Analysis***

<b>#</b>	<b>Action</b>	<b>Date</b>	<b>Responsible</b>	<b>Cost</b>	<b>Source</b>
1	Roundtable discussions with businesses/owners	3/11	Consultant	\$0	N/A
2	Integration of market analysis and community plan; (with adoption by 12/31/2011)	3/11	Planning/Commission; Council	\$0	N/A
3	Roadshow to business/property owners	5/11	Planning	\$0	N/A
4	NAIBO Organizational kick-off meetings	5/11	Planning/Economic Development, NAIBO	\$0	N/A
5	Fairgrounds Green Gateway strategic business and property owner meetings/incorporation into master planning process	6/11	Planning, Economic Development, MDHA	\$0	N/A
6	International Corridor (IC) business and property owner organizational meetings	6/11	Planning/Economic Development	\$0	N/A
7	Nashville Zoo strategic meetings to discuss physical environment, future planning, market opportunities	7/11	Planning/Tourism	\$0	N/A
8	Redevelopment concept planning discussions- Chestnut Hill District / NAIBO	8/11	Planning/NAIBO	\$0	N/A
9	NAIBO business inventory and outreach	9/11	NAIBO/Economic Development	\$0	N/A
10	Core IC members and Metro forms business association (ICBA)	9/11	ICBA/Planning/Economic Development	\$10,000 Seed Funding	Agency Budgets or CDBG
11	Fairgrounds Site and Gateway Area market analysis and	9/11	Planning/MDHA	\$265,000 - \$450,000	Agency Budgets/CDBG

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	master plan completed				
12	ICBA BID testing / surveys	10/11	Planning, ICBA representatives	\$2,500	Agency Budget
13	Fairgrounds / Green Gateway TIF Projections	12/11	MDHA	\$0	N/A
14	Ongoing discussions with prospective Fairgrounds Site tenants	2011	Mayor's Office	\$0	N/A
15	ICBA BID legal review completed (if BID approved)	5/12	Corporate Counsel	\$0	N/A
16	ICCDC Concept floated with members (if BID not approved)	5/12	ICBA, Planning/MDHA	\$0	N/A
17	Corridor roadway design study completed	5/12	Planning/Public Works	\$250,000	Federal DOT
18	ICBA or ICCDC board elected	7/12	ICCDC	\$0	N/A
19	NAIBO completes business plan, marketing and branding plans	7/12	NAIBO/Economic Development	\$2,000	NAIBO membership
20	Fairgrounds Green Gateway Authority (FGGA) established or marketing organization formed	7/12	MDHA/Mayor	\$0	N/A
21	ICCDC completes 501(c)3 filings	9/12	ICCDC/MDHA	\$0	N/A
22	FGGA strategic planning completed	10/12	FGGA	\$2,500	FGGA Board
23	Fairgrounds Green Gateway TIF established	12/12	MDHA	\$0	N/A
24	ICCDC completes business plan, marketing plan	12/12	ICCDC	\$2,000	ICCDC board
25	Detailed IC urban design plan completed	4/13	Planning/ICCDC	\$75,000-\$125,000	Foundation grants, CDBG, Agency Budget, ICCDC Board

## ***Nolensville Pike Market Analysis***

26	Gateway Infrastructure improvements underway, marketing shifts to pre-leasing mode	4/13	MDHA, FGGA	TBD	TIF Bonds
27	NAIBO initiates branding and marketing efforts	4/13	NAIBO	\$10,000	NAIBO Memberships, corporate contributions
28	ICCDC sponsors first annual festival and official International Corridor kick-off	7/13	ICCDC	\$30,000	ICCDC fundraising, business in-kind contributions, corporate sponsors
29	Scoping meetings with Nashville Metros re stadium, retail, entertainment concept	7/13	Economic Development, Recreation, Planning	\$0	N/A
30	ICCDC completes sign survey & distributes pattern book	10/13	ICCDC, NAIBO, Planning/Design	\$2,500	Foundation Grant
31	IC urban design improvements initiated	12/13	Public Works, ICCDC, Planning, TDOT	TBD	TDOT, T2, CDBG grants
32	FGGA and Mayor's office announce first Fairgrounds Site tenant.	12/13	Mayor's office, FGGA, MDHA	\$0	N/A
33	Designation of Industrial parks established	12/13	FGGA, Planning/Economic Development, MDHA	\$0	N/A





### **Independent, Non-Automotive Businesses in Study Area Retail Space**

- Finer Things Art Gallery & Antiques
- Ramadan (Middle Eastern) International Market & Restaurant
- Inter-Asian Market & Deli
- Dion African Hair & Beauty
- Tre's Discount Wines
- Kentec Mega Tools
- El Baratillo Discount Center
- Restaurant Oasis Mexican Food
- Centro American Grill
- Molnero's Imports (garden statuary)
- Queen of Hearts Tattoos
- Taqueria Express
- Parisa Café Persian Restaurant
- Viajes Latinos (travel agent)
- La Visa Associates/Boletos de Avion (travel)
- Futrell Insurance Agency
- ValueVet Affordable Pet Care
- Rumba Nite Club
- Panaderia Pastelleria Centro Americana (bakery)
- Libreria Christiana (Bookstore)
- Dunya Kebab (Kurdish) Restaurant
- Shubha Ladies Clothing
- Farrar Furniture (founded 1933)
- Panaderia Latina Grocery Store/Bakery
- Paris Fashion & Shoes
- Salon de Beleza (hair salon)
- Ahmed Jewelry
- Kendra's Barber Shop
- Comunidad Hispana (travel agent)
- Impacto Latino (seamstress)
- Variedades Latinas (party supply, gifts)
- Medrano Express (transport service)
- Able Restaurant Equipment
- McPherson & Kelly (printing)
- Sylvan Park Café
- Lyle's School of Hair Design
- Phonoluxe (destination vintage record store)
- La Hacienda (destination Mexican restaurant)
- La Hacienda Bakery
- La Elegancia Fashion & Boutique
- Flat Rock Café
- Ellis Funeral Home
- Premier Furniture Rental
- Istanbul (Turkish) Restaurant
- Novedades Teran (baby/children's)
- Southern Trophy House
- La Yaquita Supermercado & Carniceria
- Taqueria Belen
- Billiard Store
- Nashville Psychic Center
- Lion's Den
- Oasis Salon
- House of Kebab
- Lao Lanexang (Laotian Business Services)
- Somwahng Beauty Shop
- International Food Market

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## ***Nolensville Pike Market Analysis***

- Sunshine Laundromat
- Nashville Sports Leagues
- Change of Place Realty
- Efficient Tax Services
- Rafael Velez Immigration Law
- Don Juan Carniceria & Taqueria
- Johnson Do It Best Hardware
- Restaurante Los Gordos
- San Jose (Costa Rican) Taqueria
- Corlew & Perry Flooring (60 years in business)
- Law Office of Ivan Lopez Abogado Hispano
- Euro Tax & Accounting
- Security Pawn
- Nashville Dental Center
- Sam's New & Used Furniture & Appliances
- Emperor Tattoo
- A&H Muebleria / Furniture
- Ahmed Zein's Home Decoration/Oriental Rugs
- Affordable Awards
- Hip Hop Legends
- McAllister's Vacuum Cleaners
- Braid's Beauty Salon
- Osborn's Bi-Rite Grocery
- Beverly's of Nashville
- Crescent Carpets
- Sudanese Community & Women's Service Center
- Friends & Associates Mortgage
- Tennessee Choice Realty
- Deal Bazaar
- Good & Used Furniture & Appliances
- San Judas Flea Market/Pugla Hispana
- Moseley Chiropractic Clinic
- Mr. Business Card Printing
- Gold Star Barbershop/Peluqueria/Arabic
- African Fabric Store
- Top Fashion (Jeans, Shirts, Fragrances)
- Siam Café Thai Restaurant
- Molinas Beauty Shop
- Los Amigos Bilares & Restaurant
- Taqueria & Pupeseria
- Latino Used Tires
- Kebab Gyros Greek Restaurant
- Southeast Clinic
- World Finance
- Queen Market/Discount Tobacco
- El Tapatio (Chicken)
- Sleep Well Mattress Center (Marcas de renombre)
- Woodbine Funeral Home
- Nashville Dog Training Club
- Affordable Insurance Agency
- Private Video/CD
- Cosmo Prof
- California Clothing (Brazil, Peruviana, Colombian)
- Enet Telecommunications
- Collis Interiors
- Cunningham Insurance
- Express Latino Services (travel agent, etc)
- Uniglo Nails
- Signology

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## ***Nolensville Pike Market Analysis***

- Tara Market – Halal butchery and bakery
- Lazziz Persian Restaurant & Market
- Viva Saludable Natural Products
- Expert Alterations
- Rapi Servicios
- Halal Market
- Norbett's Buy & Sell Furniture
- La Bodega Carniceria (Butcher)
- Supermercado La Reyna & Carnecería (supermarket & butcher)

### SOUTH TO HARDING PLACE

- Elysian Fields Sports Bar & Grill
- Unfinished Furniture Clearance Center
- Apna Bazaar Indian-Pakistani-Bangladeshi Groceries
- Bucanos
- Al Baghdadia Middle Eastern (Iraqi) Clothing & Accessories
- Hair Crafts
- Media Tech Computers
- Azadi International Halal Meat
- Latino Americana Tires
- El Amigo Tacos & Mariscos
- Studio Nails
- Babylon Store Used Electronics
- Grassmere Grill & Kebabs
- Lawyer Abogado
- Salvadorean Center of Nashville
- Mazli International Market (Halal)
- Al-Rasoul Market, Restaurant, Bakery
- Castle Dental Center
- Fiesta E-Mart International Food
- Nails Tech
- Wing Stop
- Dental Associates
- Sultan Café
- Gana Stop
- China Moon Chinese Restaurant
- Paragon Mills Loan Co.
- Grassmere Animal Hospital
- Koor International Market
- Enson's Shoes
- V&V Seafood Market-Pho Noodle Vietnamese
- La Cucina de Paula Mexican Restaurant
- Ceja Enterprises Accounting
- World Cash Services
- AAA Woodbine Florist
- Kato Discount Liquors
- Patel Brothers Indian Fashions
- Discomania
- Pam's Salon Estetia
- Boletos de Avion
- Clinica Hispana La Paz (Bolivia)
- Dentista
- Exanemos
- Long's Buffet Sushi / Seafood
- Kari's Jewelers
- George's Total Image Salon
- S&S Barber Shop
- Hairworld Beauty Supply