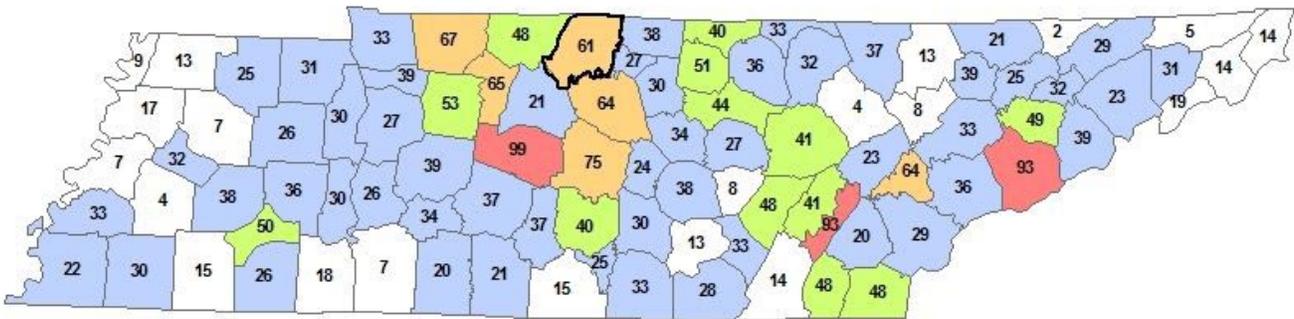


Another way of examining growth in Tennessee is by utilizing a percentage of increase and extrapolating that information into the future. From 2000 to 2025, Sumner County is projected to be in the top ten counties with the highest growth rates in the state. Its population is projected to increase by 61 percent. Population projections are one's best estimate at growth potential in the future based upon past historical trends and future opportunities, so these projections may not be completely accurate. Figure 2-2 illustrates potential high growth areas in the state along with county growth rates through 2025. The table also lists the top growth counties. A number of the fastest growing counties are within the Middle Tennessee region. Growth is also depicted throughout the Cumberland Plateau as Tennessee's milder climate and low cost of living attracts retiring adults and those seeking vacation homes who are deterred from living along the U.S. coasts because of higher costs of living.



Rank	County	Growth Rate	Rank	County	Growth Rate
1	Williamson	99%	6	Cheatham	65%
2	Meigs	93%	7	Loudon	64%
2	Sevier	93%	7	Wilson	64%
4	Rutherford	75%	9	Sumner	61%
5	Montgomery	67%	10	Dickson	53%

Figure 2-2: County Growth Rates – 2000-2025

Source: "The Value of Farmland", Presentation at Tennessee Farmland Legacy Conference (2008)

In a regional context, Sumner County and Tennessee are experiencing similar trends as other counties and states in the Southeast. A way of examining these trends is to look at housing density changes in once rural areas of the South. Figures 2-3a through 2-3f depict housing density in the South from 1970 through 2000 and projects previous growth trends into the future through 2030. This depiction is not a criticism of density, but a representation of the growth pressures facing many of these communities. Housing density trends suggest a substantial increase in population along the Gulf Coast and around metropolitan areas. Housing density appears to increase the most in Virginia, North Carolina, South Carolina, northern Georgia, northern Alabama, Tennessee and Kentucky. In Tennessee, one can see how the metro areas are starting to blur together with connections towards Louisville and Huntsville from Nashville and to East Tennessee connecting to Atlanta and Charlotte. Housing density trends of this nature will have significant impact on the quality of life that attracts new residents to the South. Increased traffic congestion and travel times, developed viewsheds and agricultural lands, decreased air and water quality, and threatened loss of the unique identity in Sumner County are possible consequences of continued unmanaged growth. Some cities, counties, and regions are changing these trends

Many of the qualities that attract new residents to Tennessee are also some of the most endangered without decision makers thinking and planning for the future and residents holding them accountable.

by taking more proactive measures by promoting the development of comprehensive plans and appropriate best practices that result in positive community development. Organizations such as the Nashville Area Metropolitan Planning Organization (MPO), Cumberland Region Tomorrow, Cumberland River Compact, and Greater Nashville Regional Council are leading regional conversations about growth and promoting best practices.

Substantial growth as shown on the housing density maps also impacts the environment. A visual preference survey was conducted at a joint training session among local city and county planning commissioners in 2008. Images of the built environment were displayed on a screen and participants were asked to score their favorability of those environments. Images depicting mass transit and greenways tended to be highly desirable, while images showing vast parking lots and strip shopping centers were less desirable. Participants also indicated an interest within the county to maintain and enhance the region's water and forest resources with best management practices involving green infrastructure. Results of the visual preference survey are found in Appendix F. Many of these sustainable techniques are not reflected in Sumner County's current subdivision regulations and zoning resolution. These regulatory documents typically do not prohibit these practices, but they do not provide incentives to encourage them.

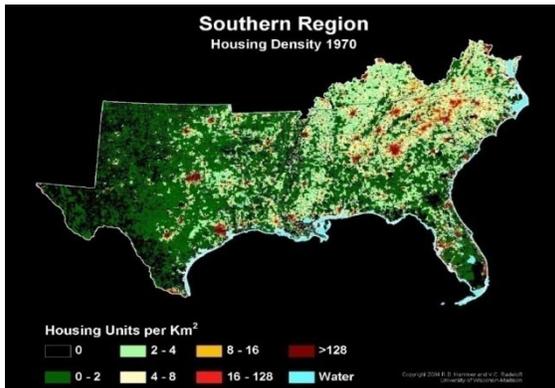


Figure 2-3a: Housing Density in 1970

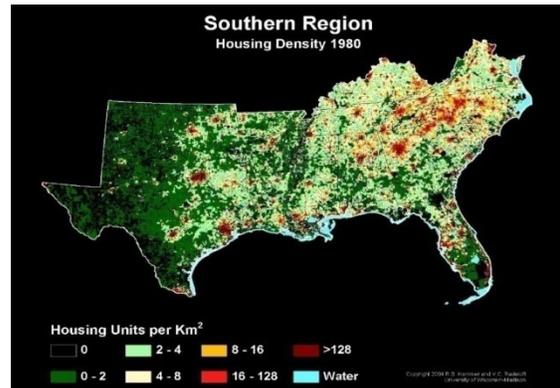


Figure 2-3b: Housing Density in 1980

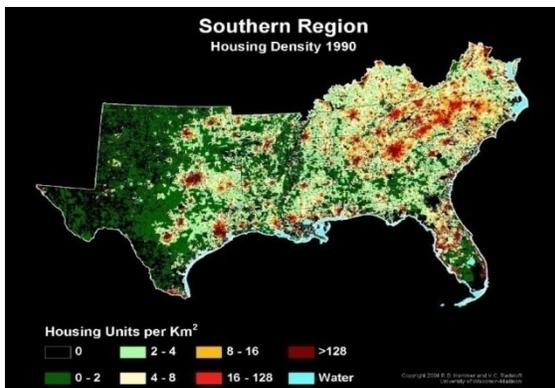


Figure 2-3c: Housing Density in 1990

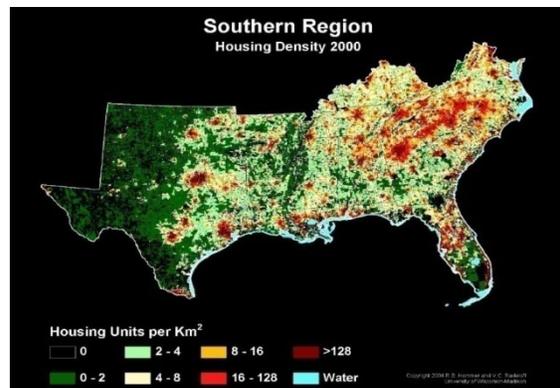


Figure 2-3d: Housing Density in 2000

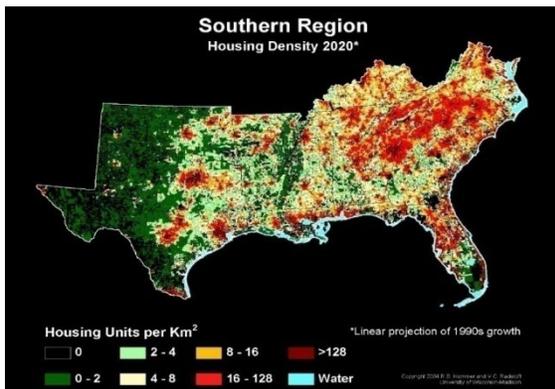


Figure 2-3e: Housing Density in 2020

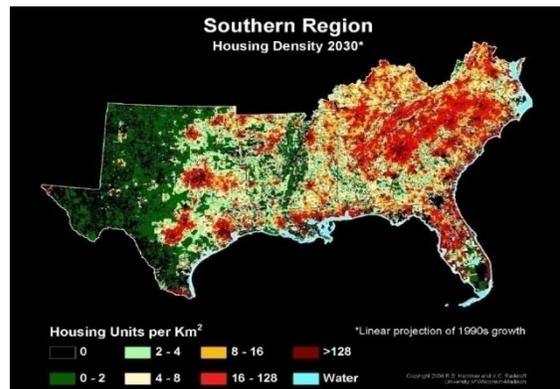


Figure 2-3f: Housing Density in 2030

Source: R. B. Hammer & V.C. Radeloff, Univ. of WI-Madison (2004)

2.2 Sumner County Trends & Projections

Sumner County's past, responsive decisions should be assessed with demographic and development trends and projections. These trends are based upon the most recent Census data and estimates; current assessment of commercial, retail, industrial, and residential space; existing municipal and county policies; and other relevant data. It is then projected or modeled into the future. The following trends and projections have been generated from reputable sources such as the Nashville Area MPO, Tennessee State Data Center, and U.S. Census Bureau. The 2010 Census will further refine this data.

Population

Figure 2-4 depicts the population in Sumner County from 1900 to 2000 by the U.S. Census Bureau. The 2007 population of 152,271 people is a U.S. Census Bureau estimate. For 2010, the population is estimated at 161,570 people. The estimates for future years are projections conducted by the Nashville Area MPO and were vetted for appropriateness by local officials and government staff. The 2010 Census is currently underway and population totals will likely be available by 2012. The county population numbers include residents of the municipalities. Since 1960, the population of Sumner County more than tripled by 2007 with an additional 96,000 residents. By 2035, the population is projected to increase by another 72,428 residents based upon the estimated 2010 population. At that time, 233,998 people are expected to live in Sumner County, a 45 percent increase. Projections are estimates based upon past historical growth trends and future opportunities, so these numbers can fluctuate based on changing conditions. Future population data should be used as a guide for decision maker thinking.

By 2035, the population of Sumner County is projected to increase by 72,000 residents or 45 percent.

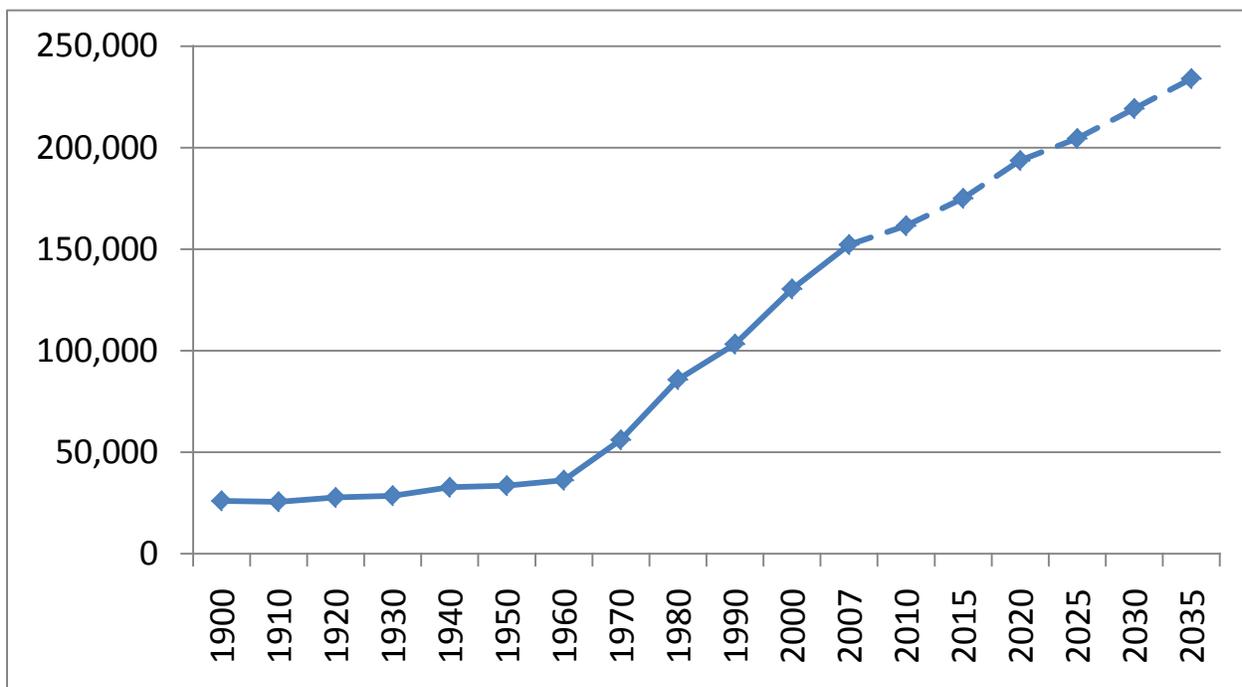


Figure 2-4: Sumner County Population - 1900-2035 (Projected)

Sources: U.S. Census Bureau, Tennessee State Data Center, and Nashville Area MPO

Population within unincorporated Sumner County is anticipated to increase. Subtracting the population of the municipalities from the county total yields the balance of population in the unincorporated county. Figure 2-5 depicts the growth in unincorporated Sumner County since 1900. Unincorporated county has experienced similar growth as the municipalities in Sumner County as discussed later in this element of the *2035 Comprehensive Plan*. The unincorporated county currently has a comparable population size as the City of Hendersonville, the county's largest municipality, but the 50,070 people are distributed over a larger geographic area. This amount of population growth over time might pose questions about the size of local government and the complexity and challenges of providing county services (schools, vehicle licensing, law enforcement, emergency medical services, planning & zoning,

courts, etc.). Cities have a natural advantage of including smaller geographic areas and smaller population sizes in most instances.

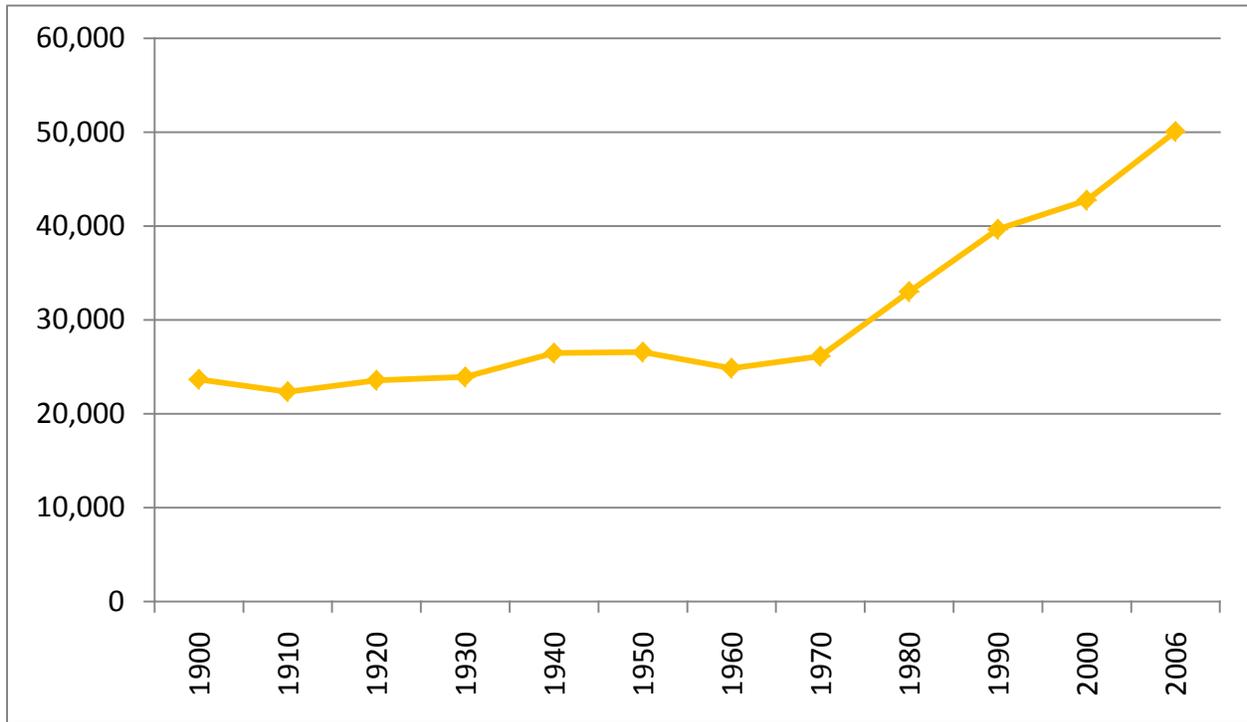


Figure 2-5: Population of Unincorporated Sumner County – 1900-2006

Sources: U.S. Census Bureau & Tennessee State Data Center

Nearby counties such as Robertson, Rutherford, and Wilson have similar growth and development issues in the Middle Tennessee region. They have seen comparable population increases since 1960 (Figure 2-6). The projected population numbers are close to the 2007 estimates, except for Rutherford County. Their projection was underestimated for 2010 and did not take into account recent rapid growth. As discussed earlier, projections are an educated guess based upon previous statistics and modeling and can sometimes understate or overstate an impact.

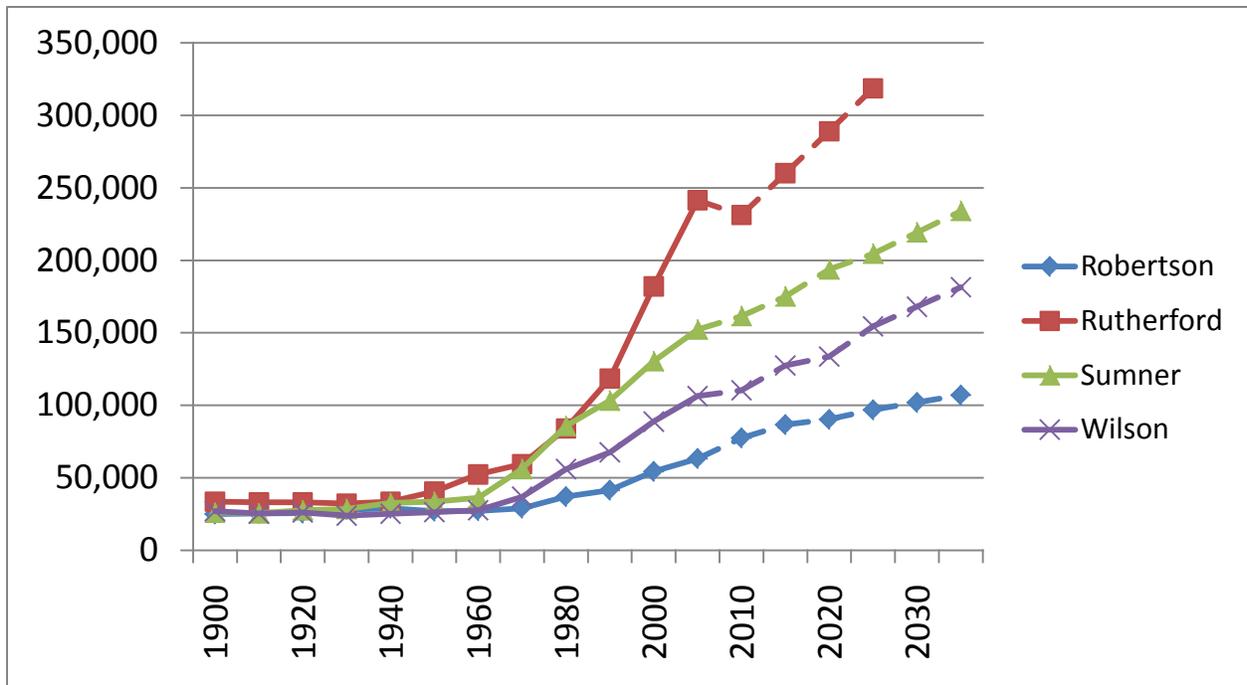


Figure 2-6: Population of Neighboring Counties – 1900-2035 (Projected)

Sources: U.S. Census Bureau & Tennessee State Data Center, and Nashville Area MPO

Figures 2-7a and 2-7b depict the populations of all the municipalities in Sumner County. The larger municipalities and their population trends and projections are illustrated in Figure 2-7a. The smaller municipalities are illustrated in Figure 2-7b. Some historical information cannot be obtained because of incorporation and bi-county issues.

Hendersonville is the largest city in Sumner County with an estimated population for 2010 of 49,974 people. That is an increase of 308 percent since 1970. By 2025, over 64,000 residents are expected to live in Hendersonville

Gallatin is the second largest city in Sumner County and the county seat. Its estimated population for 2010 is 29,470 residents. Over 38,000 people are anticipated to live in Gallatin by 2025.

Portland located in northwest Sumner County has an estimated 2010 population of 11,536 people. By 2025, over 15,000 residents are projected to live in Portland, a 36 percent increase. Recently, Portland has annexed in areas of Robertson County, so these figures do not include any population increases from those annexations.

White House is bisected by the Sumner/Robertson County Line. The population for White House is shown for only the Sumner County portion of the city. The 2010 estimate for that area in White House is 5,542 residents. By 2025, 7,467 people are projected to live on the Sumner County side of White House.

Goodlettsville has a similar composition because it is also bisected by a county line. The population illustrated only includes residents in Sumner County and not those residents in Davidson County. The Sumner County side of Goodlettsville saw growth between 1980 and 2010. The current estimate of

5,606 residents is an increase of 3,664 people since 1980. By 2025, over 7,000 residents are anticipated to live in the area.

Millersville's population is also expected to increase from the 2010 estimate of 5,881 people to nearly 8,000 people by 2025. That is a 36 percent increase in residents.

The 2010 population estimate for Westmoreland is 2,472 people. By 2025, 3,125 people are anticipated to live in the city.

Mitchellville is Sumner County's smallest municipality. In 2010, 242 residents were estimated to live in Mitchellville. The area will remain with a steady population of 294 people by 2025.

Appendix A contains the actual numbers used in this analysis. Many of the municipalities performed special censuses since the 2000 Census was conducted, but the population projections were based upon the 2000 data. Alternatively, the county projected data developed by the Nashville Area MPO used the updated estimates performed by the cities since 2000. The 2010 Census numbers will ultimately help clarify the population numbers for the cities and the county. The primary point of this analysis is to show the significant growth increases in population anticipated in Sumner County and the region over the next 15 to 25 years.

In comparing the cities' population growth to the unincorporated county's population growth, the cities have seen a 799 percent increase in growth since 1960. The unincorporated county has seen an increase of 102 percent since 1960. In 1960, the municipalities comprised of 11,374 residents, and the unincorporated county had 24,843 people. Today, the municipalities have 102,201 residents, and the unincorporated county has 50,070 people.

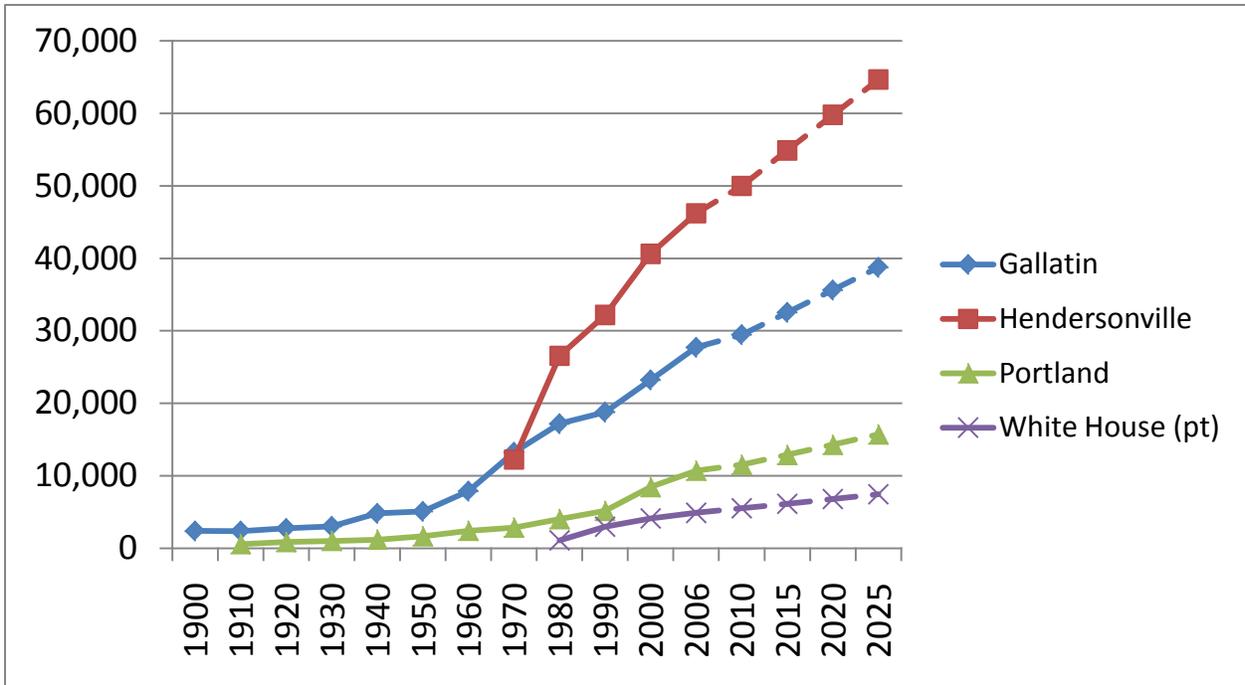


Figure 2-7a: Population of Selected Cities in Sumner County – 1900-2025 (Projected)

Sources: U.S. Census Bureau & Tennessee State Data Center

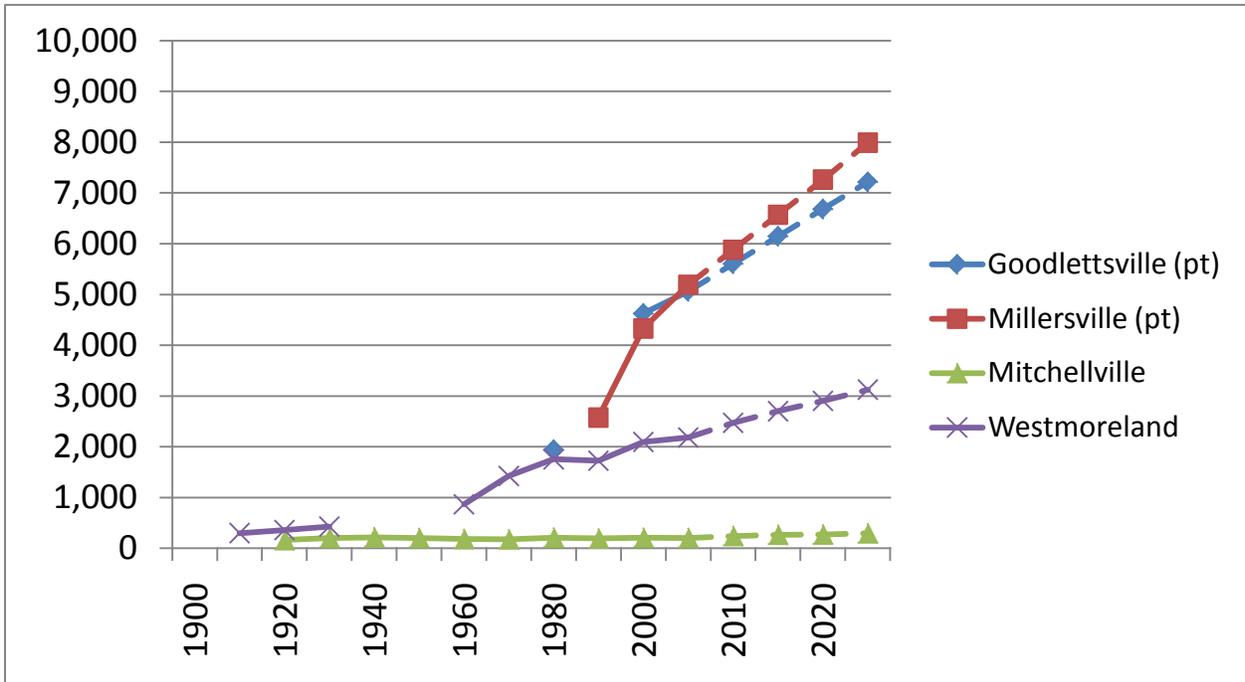


Figure 2-7b: Population of Selected Cities in Sumner County – 1900-2025 (Projected)

Sources: U.S. Census Bureau & Tennessee State Data Center

Much of the county's growth since 1960 was in Gallatin and Hendersonville and portions of Goodlettsville and Millersville in Sumner County. Portland and the portion of White House in Sumner County have also seen growth not necessarily reflected in these population numbers since the late 1990s. Figure 2-8 shows the urban growth boundaries adopted for the county's municipalities in 2000 and their city limits in 2000. Comparing this to Figure 2-9 which illustrates the urban growth boundaries and current city limits, significant portions of land to the west and south of Gallatin have been annexed; Goodlettsville has annexed adjacent land to its north and east only leaving a small area still within its urban growth boundary; and Hendersonville has annexed areas to its north and east. The cities are slowly incorporating portions of their planning regions and urban growth boundaries as part of their city limits which increases development pressures on contiguous areas of unincorporated Sumner County, especially along Long Hollow Pike (SR 174) and north of that corridor. These maps do not take into account the growth pressures occurring along I-65 in Sumner and Robertson Counties through Millersville, White House, and Portland.

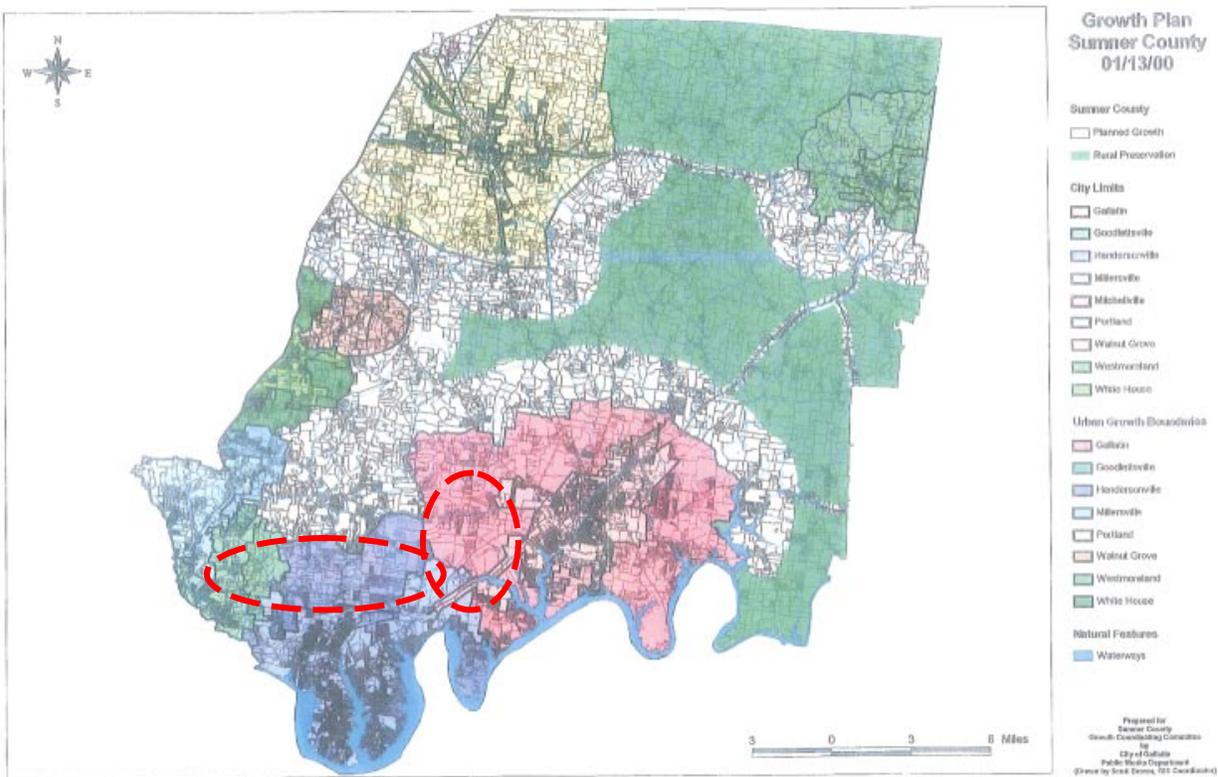


Figure 2-8: Municipal Urban Growth Boundary Areas Annexed since 2000 – Red outlined areas are generalized areas that municipalities performed annexations since 2000.
Source: Sumner County Growth Plan (2000)

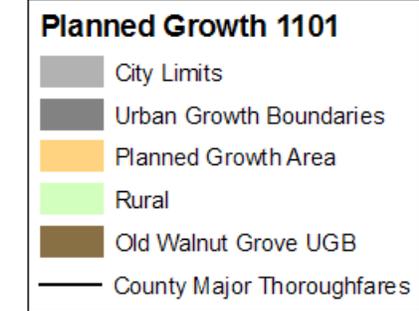
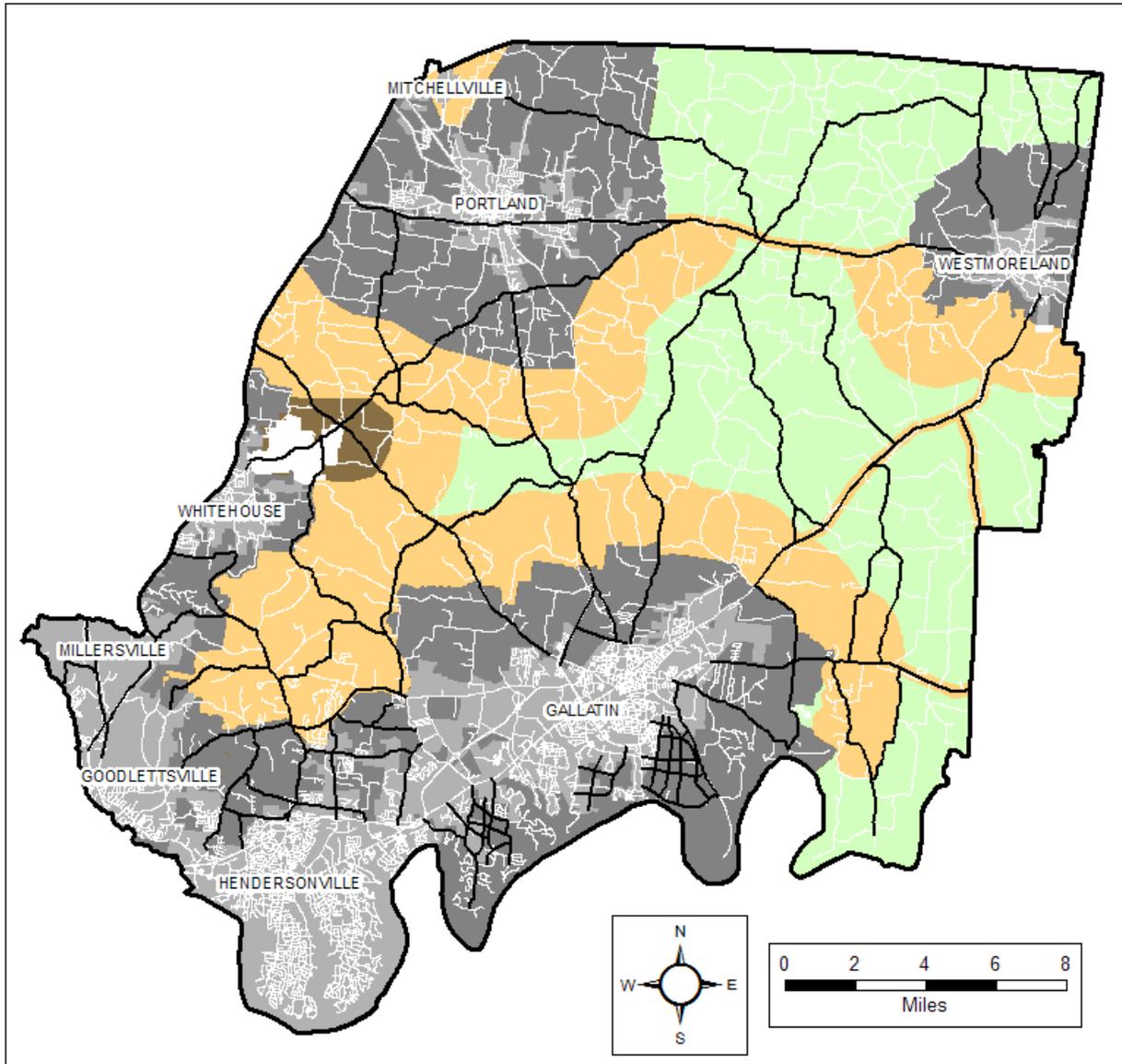


Figure 2-9: Urban Growth Boundary Areas and Current City Limit Boundaries

With population growth, the county is more urbanized as commuters move into Sumner County for relatively short commutes to Nashville because of SR 386 (Vietnam Veterans Boulevard) and I-65. The growth and annexations are primarily occurring along those corridors. This is evident in the population percentages of residents based upon density living in the urbanized portion of the county (Figure 2-10). In 1990, 61.6 percent of the population resided in urbanized portions of the county. That percentage increased in 2000 to 69.4 percent of residents. The population density per square mile is also increasing in the county in 2006 (Figure 2-11). In 1990, there were 195.1 residents per square mile in Sumner County. There were 246.5 residents per square mile in 2000. By 2006, the estimate of 282.3 residents per square mile is an increase of 87.2 residents per square mile since 1990. This same information per acre equals 0.30 persons per acre in 1990, 0.39 persons per acre in 2000, and an estimated 0.44 persons per acre in 2006.

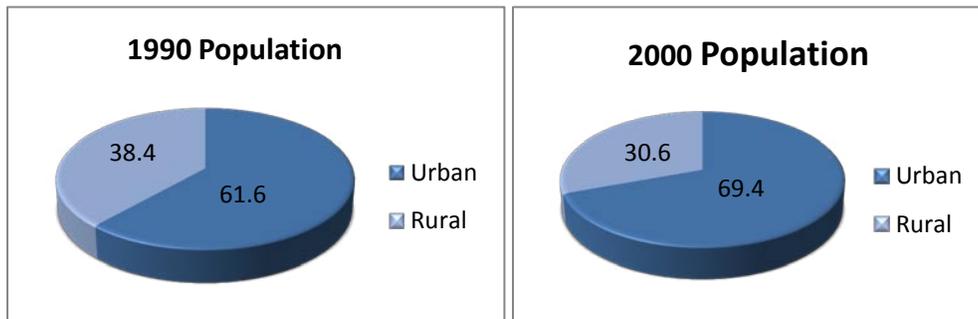


Figure 2-10: Percentage of Urban & Rural Populations in Sumner County
 Source: Tennessee Advisory Commission on Intergovernmental Relations

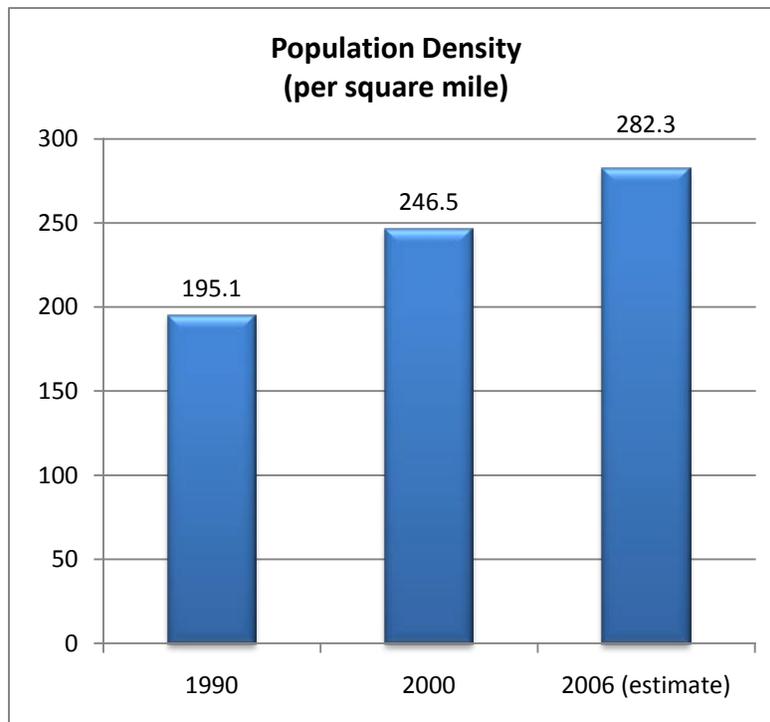


Figure 2-11: Sumner County Population Density
 Source: Tennessee Advisory Commission on Intergovernmental Relations

Economic Factors

The changing demographics in Sumner County also shape the economy. In the last decade, the county saw an increase in office, industrial, and commercial square footage. More people can live and work without leaving Sumner County and more commuters work in the county. Per capita personal income which is the total income generated by residents in the county divided by the population was \$27,061 in 1990. That number rose to \$29,279 in 2004. Median household income also rose between 2000 and 2004 by \$1,832. Median household income divides households into equal segments where the first half of households earns less than the median amount and the other half earns more (Figure 2-12). Both economic indicators show the personal wealth of residents in Sumner County rising over time. This may have changed since then because of the current economic recession that most communities nationwide are experiencing.

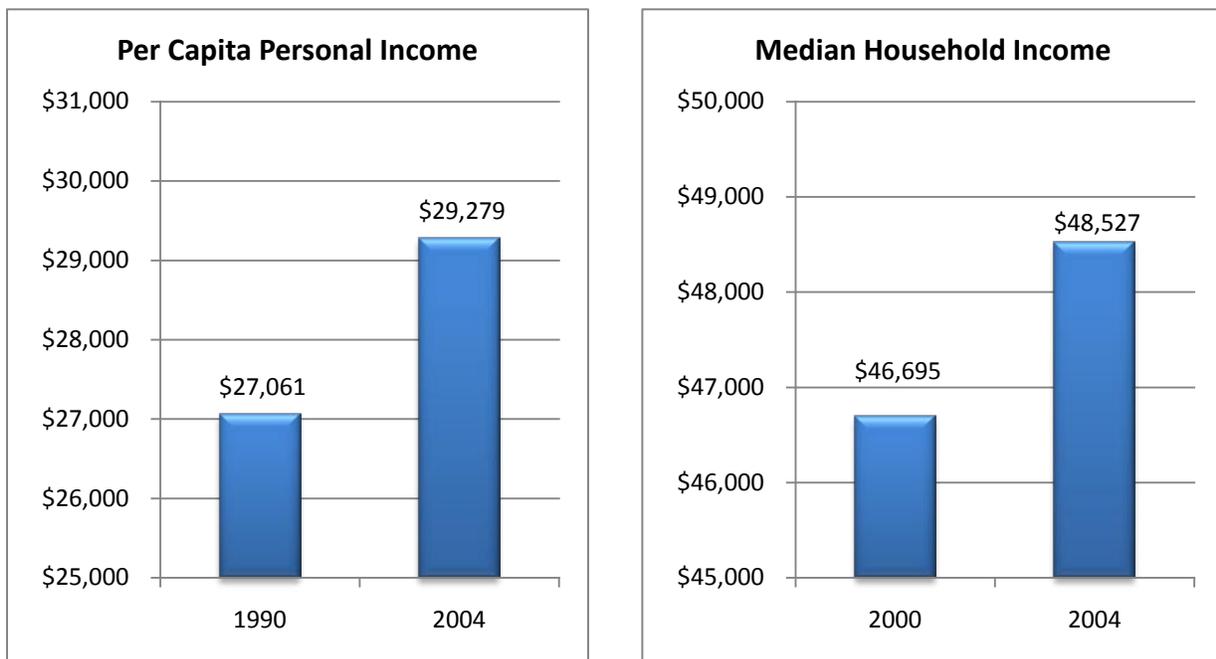


Figure 2-12: Sumner County Incomes

Source: Tennessee Advisory Commission on Intergovernmental Relations

Not all residents have benefited from the growing economy of the early 2000s. The poverty rate decreased from 13.4 percent in 1999 to 9.6 percent in 2004; however, the unemployment rate rose slightly from 4.1 percent to 4.7 percent (Figure 2-13). There is not a definitive reason as to why the unemployment numbers may have risen during this time. These numbers do not reflect the economic recession experienced nationwide beginning in late 2007.

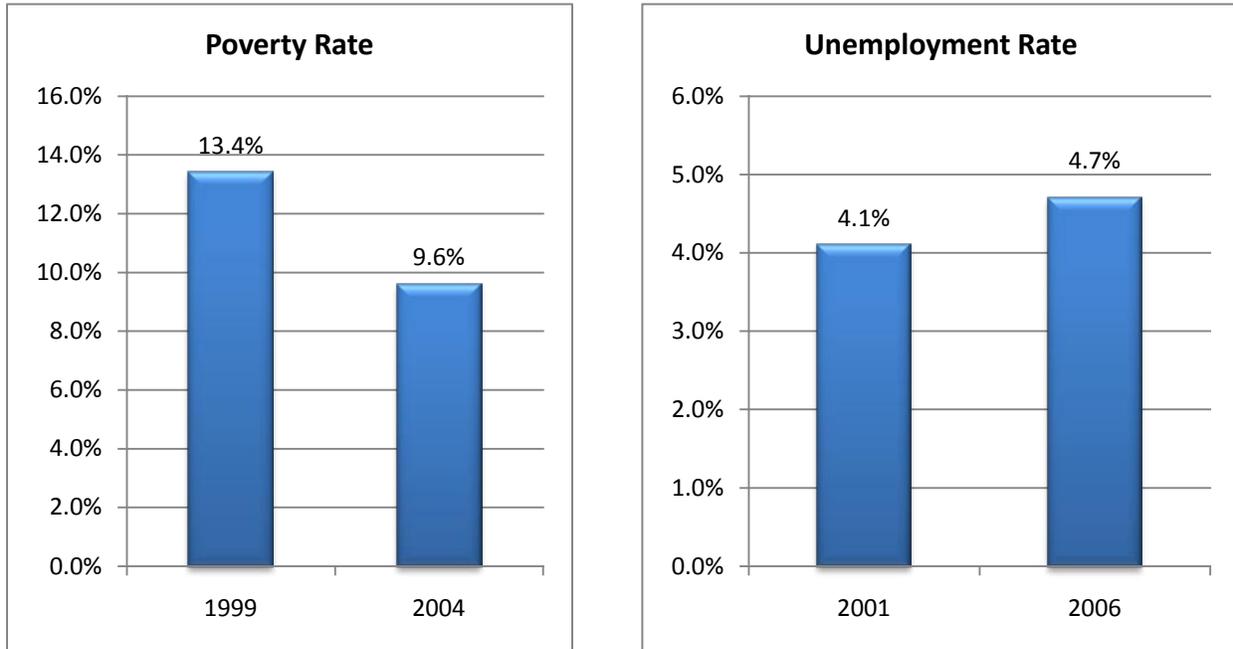


Figure 2-13: Poverty in Sumner County

Source: Tennessee Advisory Commission on Intergovernmental Relations

The top 20 private employers in Sumner County and the type of business activity are denoted in Figure 2-14. The largest private employer is located in Gallatin, Sumner Regional Health System, with 1,326 employees. The largest employers are located within the Cities of Gallatin, Hendersonville, and Portland. None of the largest employers are located in unincorporated Sumner County, but Sumner County Government, which includes the Sumner County School System, is the largest employer in the county with 3,900 employees.

Business	Business Activity Type	City	Number of Employees
Sumner Regional Medical Center	Health Care	Gallatin	1,326
Gap, Inc.	Clothing Distribution	Gallatin	1,250
Volunteer State Community College	Education	Gallatin	800
Hendersonville Medical Center	Health Care	Hendersonville	500
Macy's/Bloomingdale's	Online Distribution Center	Portland	500
Peyton's Mid-South	Supermarket Distribution Center	Portland	475
FDS, Inc. Federated Department Stores	Distribution Center	Portland	409
RR Donnelley & Sons	Binding	Gallatin	320
ABC Fuel Group Systems	Auto Fuel Systems	Gallatin	305
Unipress	Pressed Metal Parts	Portland	300
Thomas & Betts Corporation	Electrical Boxes	Portland	270
Kirby Building Systems Co.	Prefabricated Steel Buildings	Portland	270
SERVPRO Industries, Inc.	Cleaning & Restoration Corporate Headquarters	Gallatin	254
Walmart	Retail Merchandise	Hendersonville	200
Digital Connections, Inc.	Data Communications	Hendersonville	200
Lowe's Millwork	Door/Window Manufacturing	White House	200
Hoeganaes Corporation	Powdered Metal	Gallatin	197
TVA Gallatin Fossil Plant	Electric Power	Gallatin	175
Aladdin Group Administrators	Insulated Food	Hendersonville	175
Albany International Fabrics	Paper Machine Clothing	Portland	165

This list does not include the Sumner County Government which employs 3,900 workers, mostly within the Sumner County School System.

Figure 2-14: Top 20 Private Employers in Sumner County

Source: Forward Sumner Economic Council (2009)

The major employment industries in Sumner County are depicted in Figure 2-15. Trade, transportation, utilities, manufacturing, and government are the top industries employing 55 percent of workers. These jobs, except the government sector, are typically considered blue-collar jobs involving trade specific skills. Education & health services and professional & business services employ 21.3 percent of workers. These employment sectors are more likely to be white-collar jobs with higher pay and require more education. Another 23.7 percent of workers are employed in various other industries.

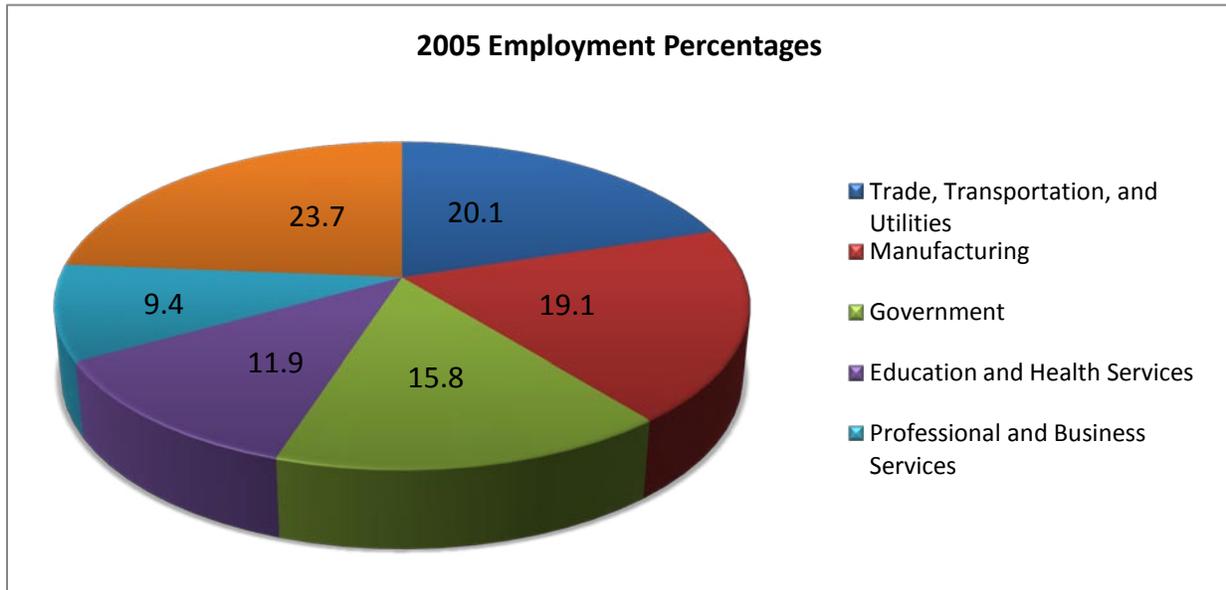


Figure 2-15: Sumner County Employment Percentages by Major Industry

Source: Tennessee Advisory Commission on Intergovernmental Relations

Examining existing and future employment growth illustrates how these major employment industries might change over time and how some of the major employers in Sumner County might be impacted. These changing industries will not only impact the county in terms of new residents but also new commuters who might travel into the county for work each day. Retail employment growth is anticipated to double by 2035 with an annual growth rate of 1.60% (Figure 2-16). Much of this increase is affiliated to new developments like the Streets at Indian Lake and the Glenbrook area in Hendersonville and new retail developments proposed in Gallatin that have not been completely built out yet. Sumner County is projected to have the smallest annual percentage increase among Robertson, Sumner, and Wilson Counties, but the amount of retail employment is at least 50% higher in 2035 than in 2008.

County	2008	2020	2035	% Annual Growth
Robertson	4,430	5,730	7,265	1.85%
→ Sumner	8,910	10,990	13,672	1.60%
Wilson	10,350	27,780	39,825	2.44%
TOTAL	23,690	31,310	60,761	2.03%

Figure 2-16: Projected Retail Employment Growth – Tri-County Study Area, 2008-2035

Source: Nashville Area MPO Tri-County Transportation & Land Use Study (2010)

Figure 2-17 illustrates a comparable trend with industrial employment growth. Not captured in these numbers are major industries locating near the State Line on the east and west side of I-65 near Portland in the Tennessee/Kentucky Industrial Park. The cities of Portland and White House recently

have worked with Robertson County in adjusting their urban growth boundaries because of retail and industrial development attributed to the interstate highway.

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

Figure 2-17: Projected Industrial Employment Growth – Tri-County Study Area, 2008-2035

Source: Nashville Area MPO Tri-County Transportation & Land Use Study (2010)

The proximity of Sumner County’s municipalities to I-65 and SR 386 which connect to two additional interstates in Nashville makes the county attractive for warehousing, distribution, and industrial services that need a robust highway system nearby for the efficient movement of goods. The Middle Tennessee region can also access a high percentage of the U.S. population within a day’s drive making the movement of goods a focal point in the region. CSX railroad also has a line that runs through Sumner County connecting to Nashville furthering enhancing industrial growth.

Office employment growth is projected to increase by more than 50 percent by 2035 (Figure 2-18). Most development in the office employment sector is from the area around Indian Lake Village in Hendersonville. Gallatin is also planning for future office space development in the area near Volunteer State Community College and the Sumner County Administration Building.

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

Figure 2-18: Projected Office Employment Growth – Tri-County Study Area, 2008-2035

Source: Nashville Area MPO Tri-County Transportation & Land Use Study (2010)

The growth anticipated in retail, industrial, and office sectors will influence household growth within Sumner County (Figure 2-19). A 38 percent increase is projected in the number of households in the county by 2035. The population growth of Sumner County is closely tied to the increase in households.

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

Figure 2-19: Projected Household Growth – Tri-County Study Area, 2008-2035

Source: Nashville Area MPO Tri-County Transportation & Land Use Study (2010)

Each sector, retail, industrial, office, and housing, is projected to increase at an annual rate of 1.60 percent to 1.80 percent in Sumner County through 2035. In many instances, the total growth in each sector increases by 40 to 50 percent.

Adequate Services

Understanding the potential demand for future services is essential in estimating local government budgets. The 2008 Cost of Community Services Study from Robertson County is discussed in the Introduction Element (1.0) (see Figure 1-5). Robertson County was the closest county to Sumner County that had recently completed one of these studies. Based on this study, the burden of providing adequate services is passed on to the local taxpayer in instances where revenues do not cover expenditures. The type of land use can have an impact on future budget projections.

Figure 2-20 shows the estimated future demand for services that a municipality, Sumner County, or a utility district may need to provide in Sumner County by 2035. The information on the left shows the amount of recommended delivery service standard. The column on the right depicts the estimated future demand needed to provide adequate coverage in those key service areas based upon population projections for 2035. This gives an idea of future service demands needed for those providers in Sumner County.

Service Type	Recommended Service Delivery Standard	Estimated Future Demand
Fire Protection	1.29 firefighters/1,000 residents	302 firefighters (an additional 27)
Police Protection	.84 officers/1,000 residents	197 officers (an additional 72)
Potable Water*	250 gpd/1,000 sq. ft. residential 0.10 gpd/1,000 sq. ft. industrial 0.64 gpd/1,000 sq. ft. commercial & office	12.1 gpd/1,000 sq. ft.
Sewer**	225 gpd/1,000 sq. ft. residential 0.069 gpd/1,000 sq. ft. industrial 0.080 gpd/1,000 sq. ft. commercial & office	9 gpd/1,000 sq. ft.
Parkland	10 acres/1,000 residents	2,340 acres

gpd - gallons per day

sq. ft. - square feet

Figure 2-20: Estimated Future Demand for Services

Source: Nashville Area MPO Tri-County Transportation & Land Use Study (2010)

Another delivery service that the county provides that is not included in this table is public education. The Sumner County School System comprises between 80 to 85 percent of the annual budget of the Sumner County Government in any given year. The funding of public education is closely tied to the potential of economic growth, but the school system can have a significant impact on the county's financial health. The coordination of new school buildings within existing infrastructure can tremendously reduce costs over time compared to building facilities where infrastructure must be upgraded. When a school building is built in an area lacking adequate infrastructure, the local government and utility systems must also spend money to upgrade facilities. Although these sites may be more financially attractive initially, they often cost more over time with the increasing strain on adequate infrastructure that will need to be updated. Additionally, the development of residential areas can seriously impact the services of the school system causing a shift in school populations. Station Camp High School (Figure 2-21) was built to handle the student population growth in the Hendersonville

and Gallatin areas. The high school has been paired since with an elementary and middle school. The school complex was one factor generating a need for additional infrastructure improvements in the area like the construction of Big Station Camp Boulevard, the proposed extension of Jenkins Lane, improvements to Saundersville Road, improved sidewalks, and development of a new greenway. New residential and commercial services are also proposed in the immediate area because of the adjacent growth. Coordinating infrastructure improvements through school site planning, utility system upgrades and expansions, land use changes, and proposed transportation improvements are critical in reducing the tax burden upon residents. Currently, that level of robust planning is not taking place between the school system, utility systems, Sumner County, and the municipalities. The Implementation Element (7.0) contains a strategy to begin intergovernmental coordination regarding these development activities.



Figure 2-21: Station Camp High School
Source: Station Camp High School Website (2010)

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