





# COMMUNITY SURVEY

## Gen H - Comprehensive Plan Survey

Open from August 14, 2023 through November 14, 2023, the Gen H - Comprehensive Plan Survey was open for just over 8 weeks. During that time city of Hendersonville staff attended community events, held meetings with City Council, visited schools, and popped at community gathering spots encouraging community members to take the survey. In addition to the community survey, a student survey was also developed and shared with local high school students.

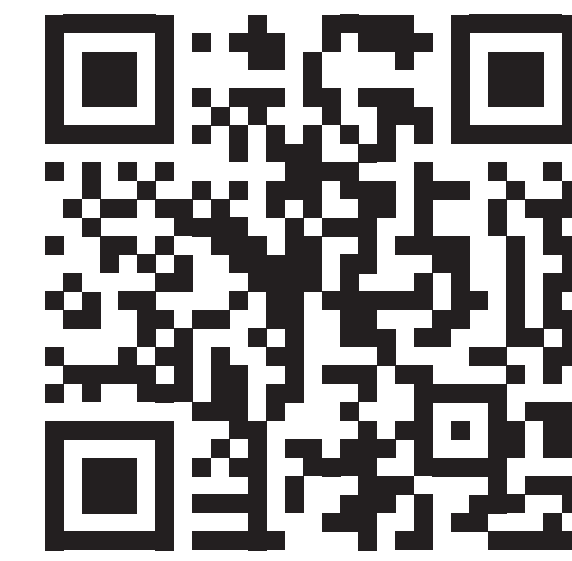
In all, just over **4,700 people participated** in the surveys and provided over **10,500 individual comments**. Survey results and ideas generated from comments will be used to aid in the development of the Gen H Comprehensive Plan and help guide recommendations for Hendersonville's future over the next 20 years.

Thank you to all who took the surveys!

View All Survey Results Here:



Student Survey

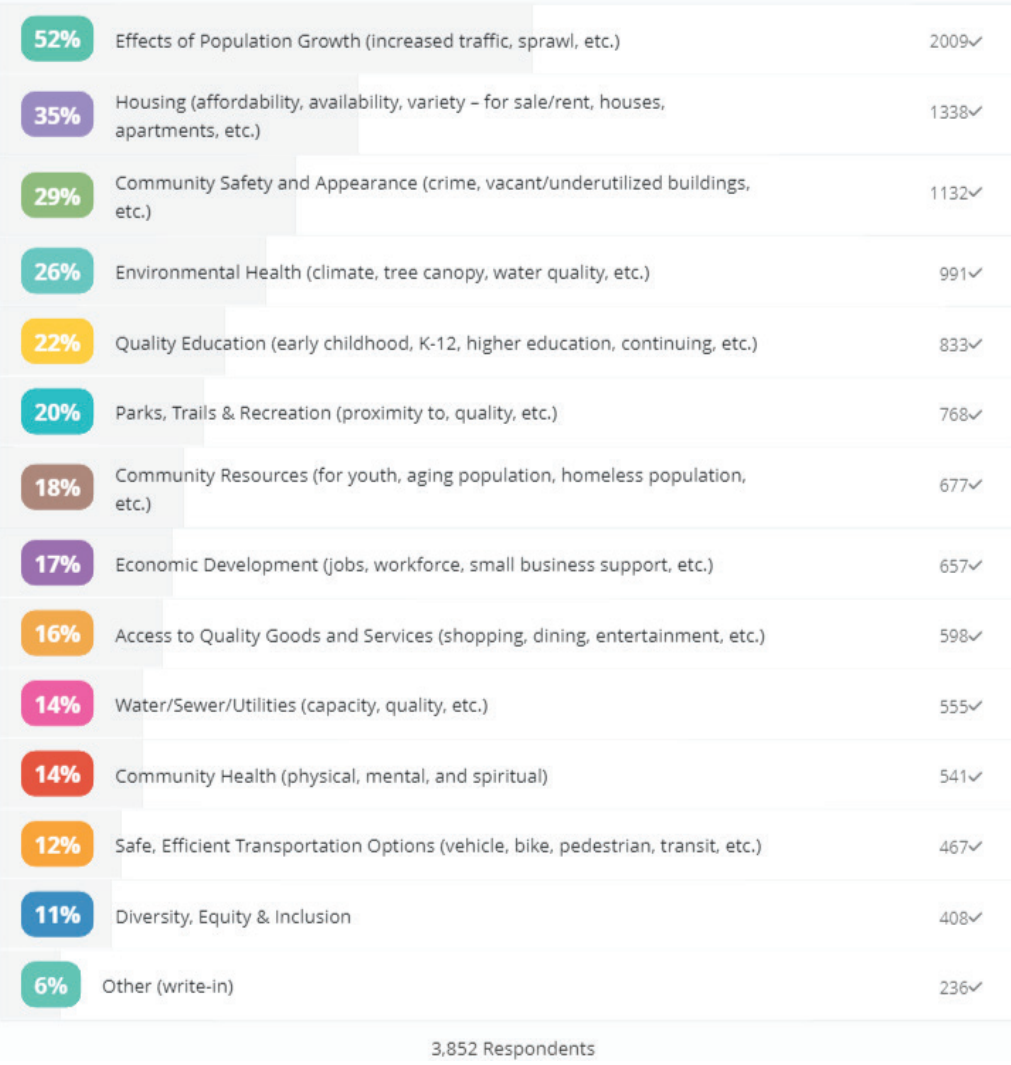


Community Survey

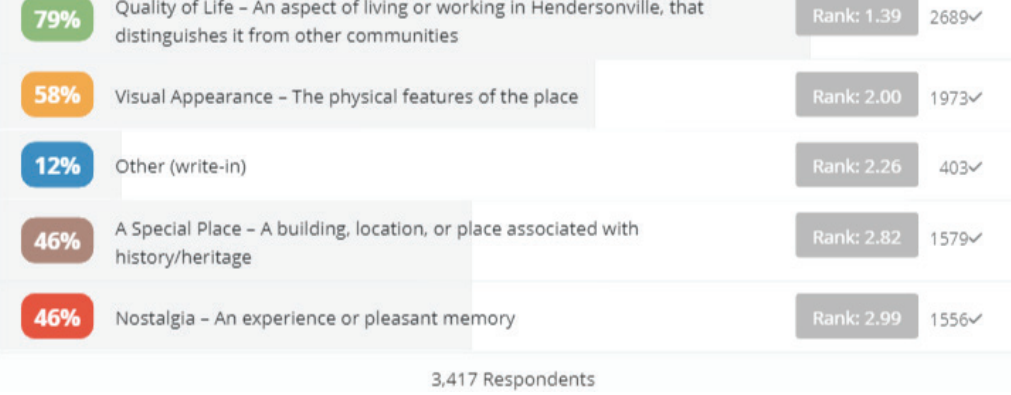
## Summary of the Community Survey

Survey Questions 3 and 15 are short answer form questions. Individual responses can be viewed in the survey results by scanning the QR codes.

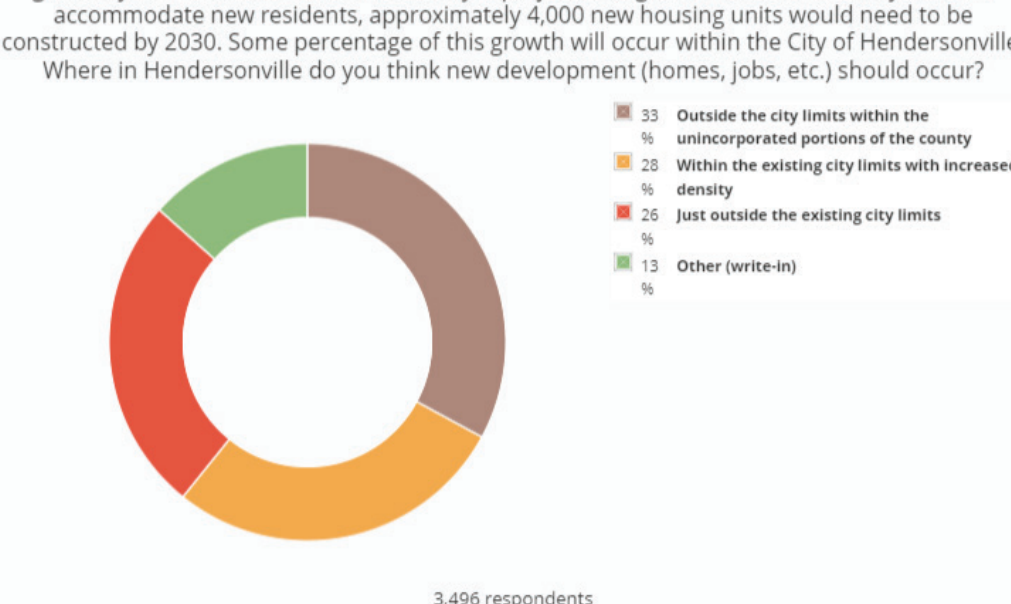
1. As you look into the future, what are the top three things you are most concerned about for Hendersonville?



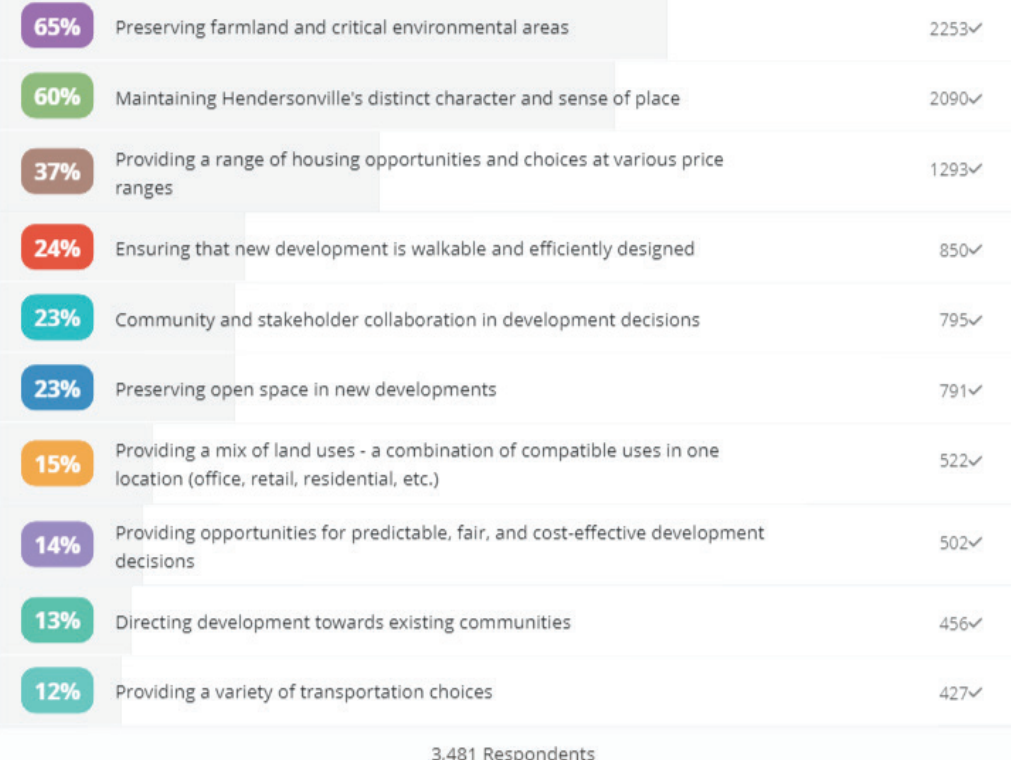
2. In your opinion, what gives a place "character"? Please rank.



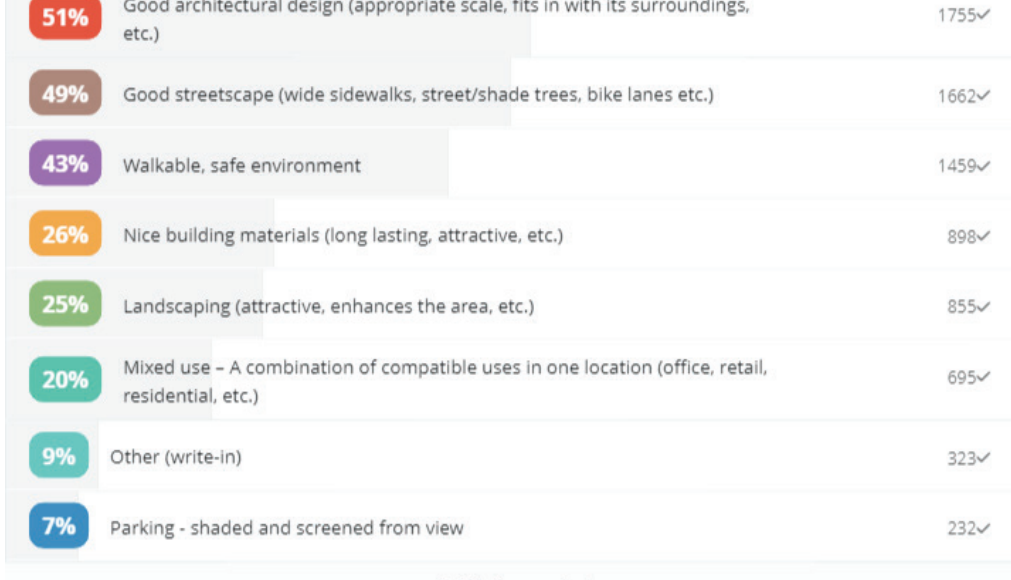
4. Based on data from the U.S. Census and state population projections, Henderson County has grown by 9% from 2000-2020. The County is projected to grow an additional 8% by 2030. To accommodate new residents, approximately 4,000 new housing units would need to be constructed by 2030. Some percentage of this growth will occur within the City of Hendersonville. Where in Hendersonville do you think new development (homes, jobs, etc.) should occur?



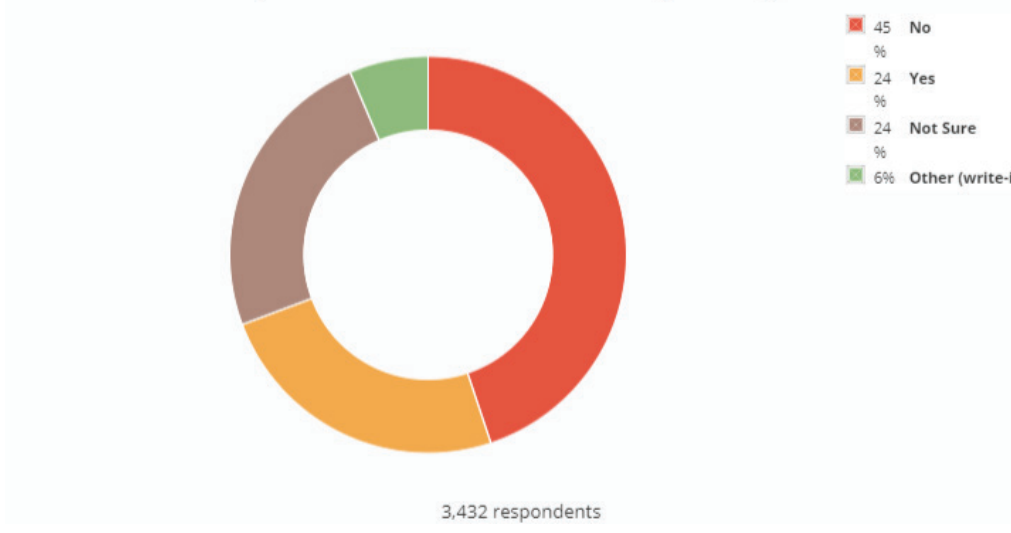
5. What are your top three priorities as Hendersonville plans for its future?



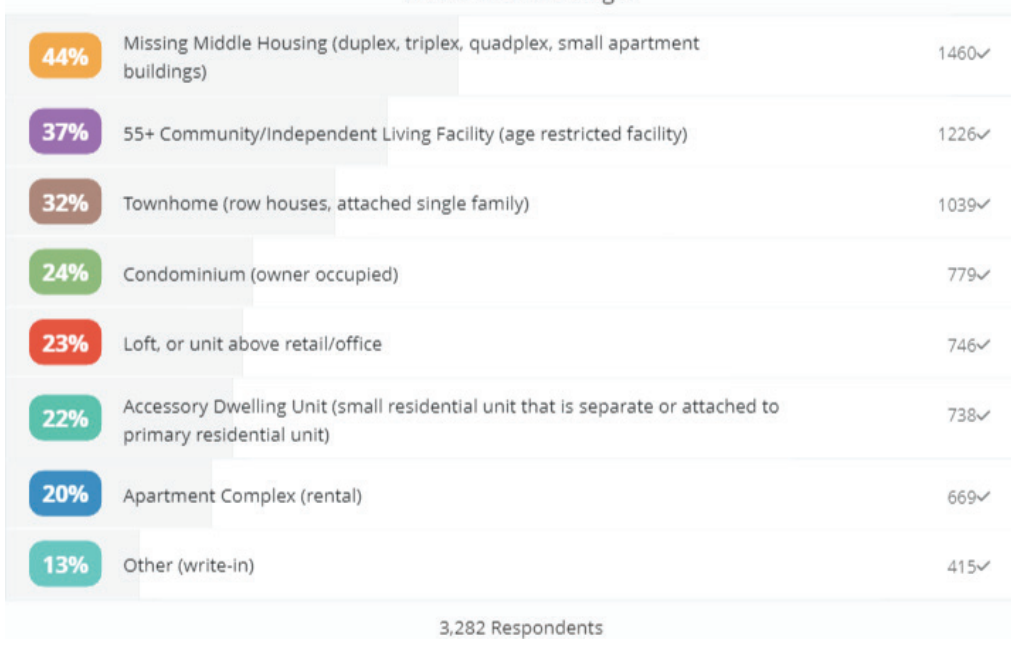
6. To me, "quality development" means:



7. Do you feel that Hendersonville has enough housing units?



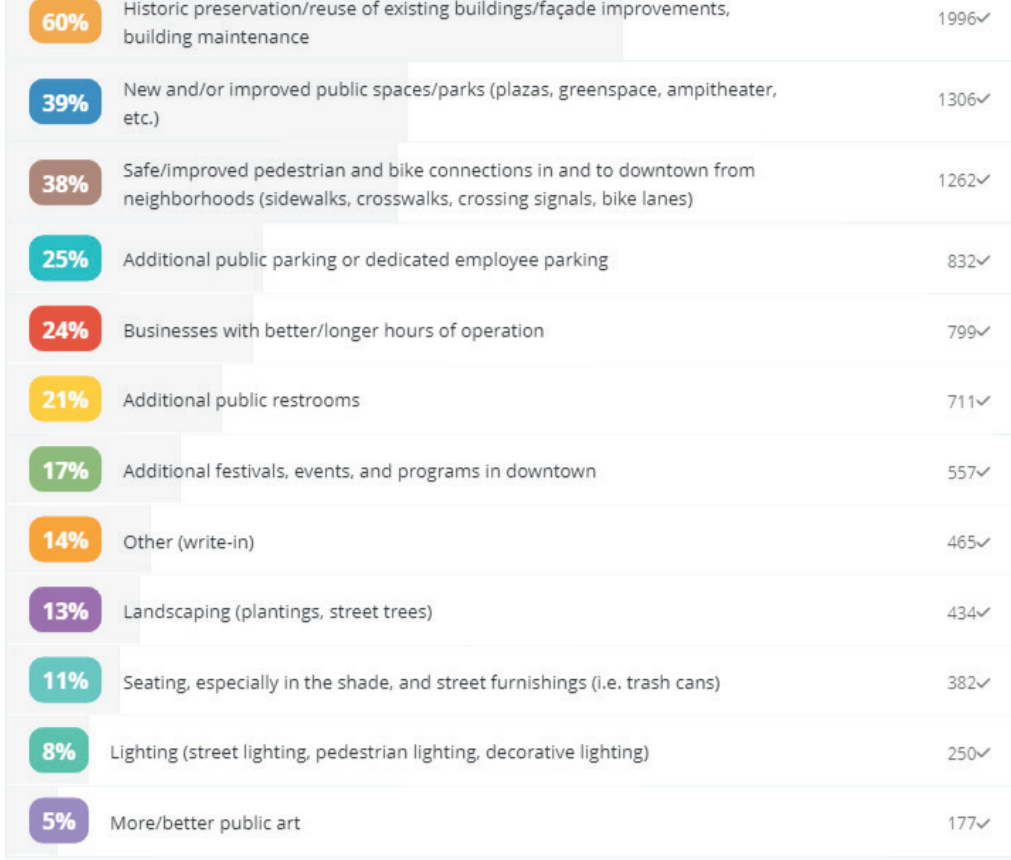
8. From your first home as an adult, to the home where you spend your adult life, and the home where you plan to grow old, a community can provide a variety of housing types for all the various life stages based on needs and cost of living. Looking to the future, what housing types (beyond single family houses) does Hendersonville need to ensure residents can find housing to match their life stage?



9. If you spend time in downtown, select all the reasons you come here:



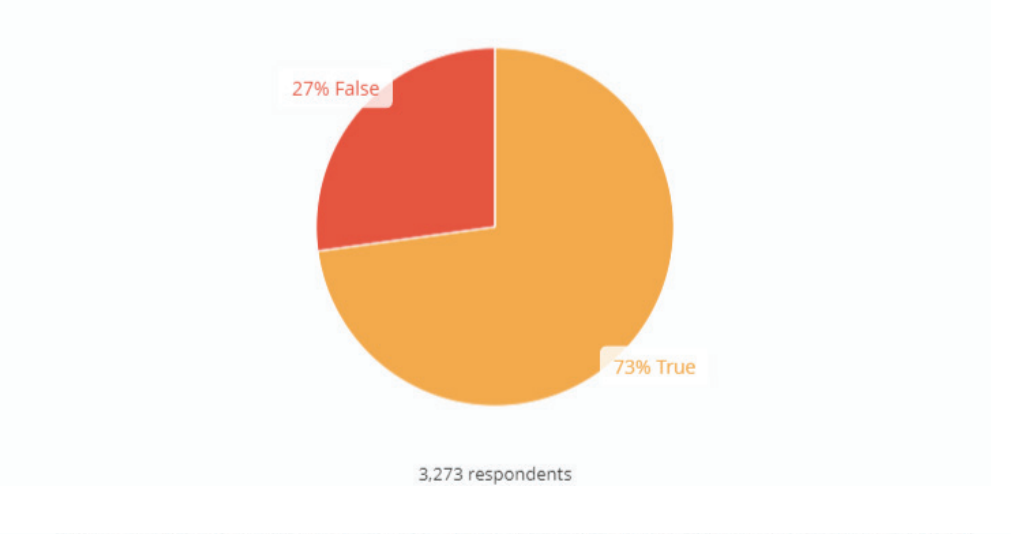
10. What are your top three improvements for downtown?



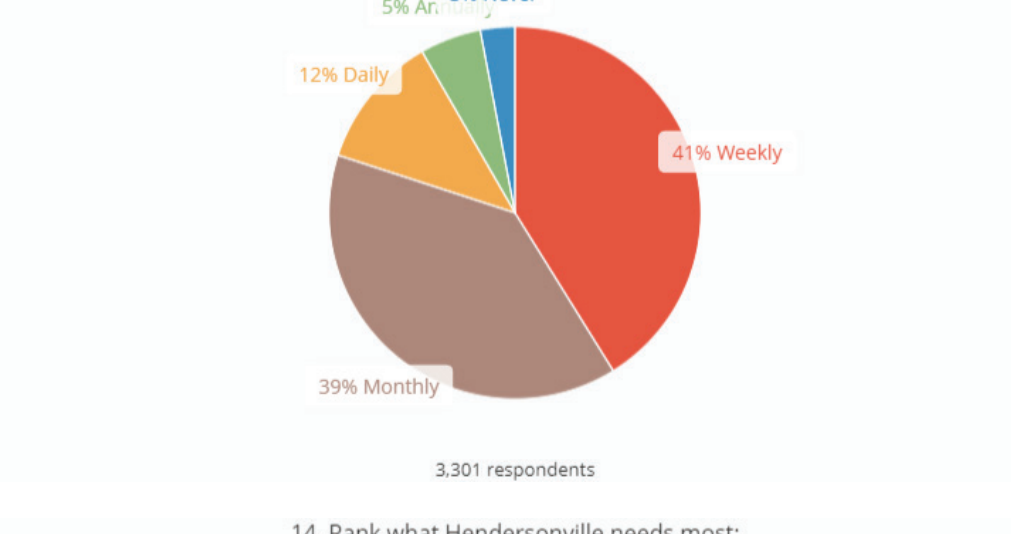
11. What types of places does downtown Hendersonville need (or need more of)?



12. True or False: I can buy most of what I need in Hendersonville.



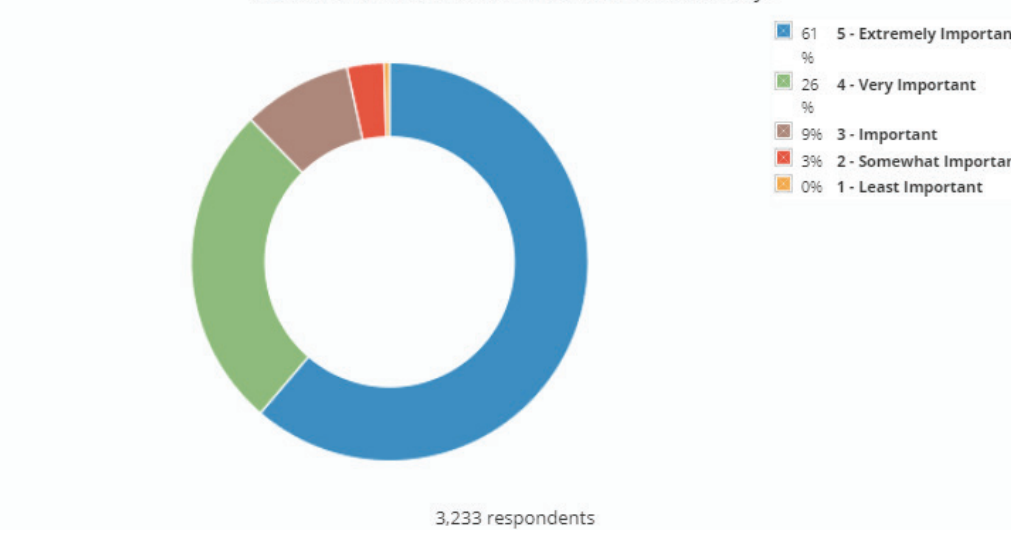
13. How often do you travel outside of the city limits of Hendersonville to shop or dine?



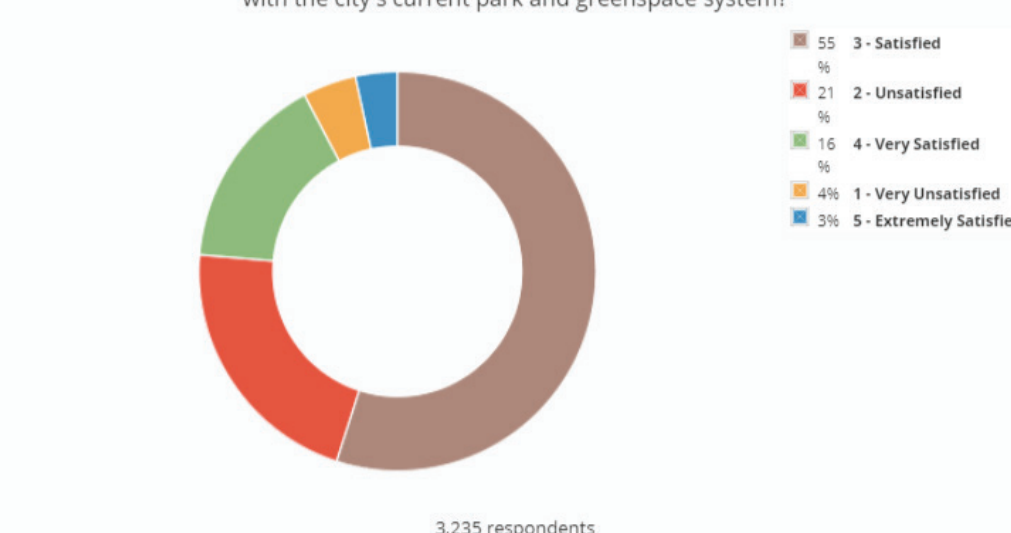
14. Rank what Hendersonville needs most:



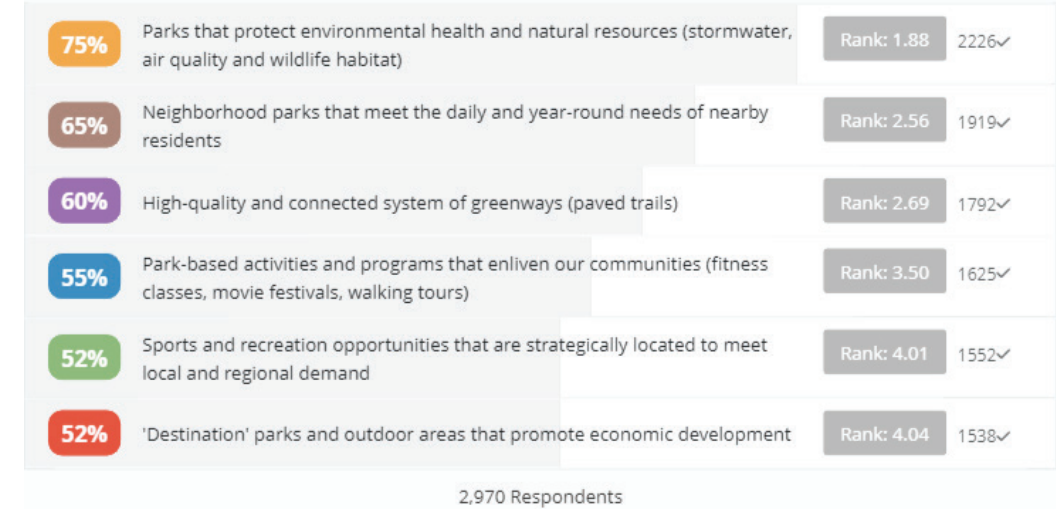
16. On a scale of 1-5 with 1 least important and 5 extremely important, how important is the natural environment to Hendersonville's identity?



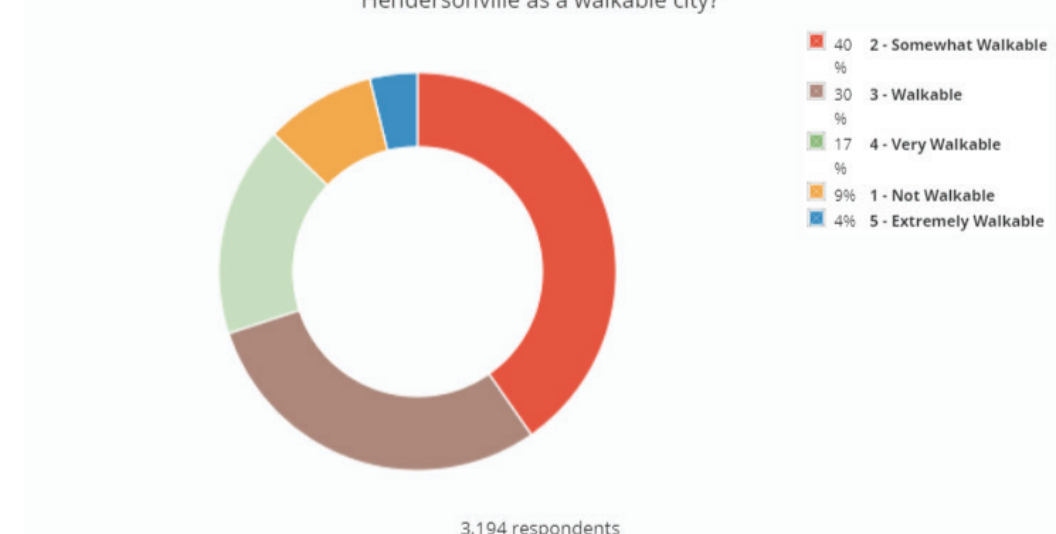
17. On a scale of 1-5 with 1 being very unsatisfied and 5 extremely satisfied, how satisfied are you with the city's current park and greenspace system?



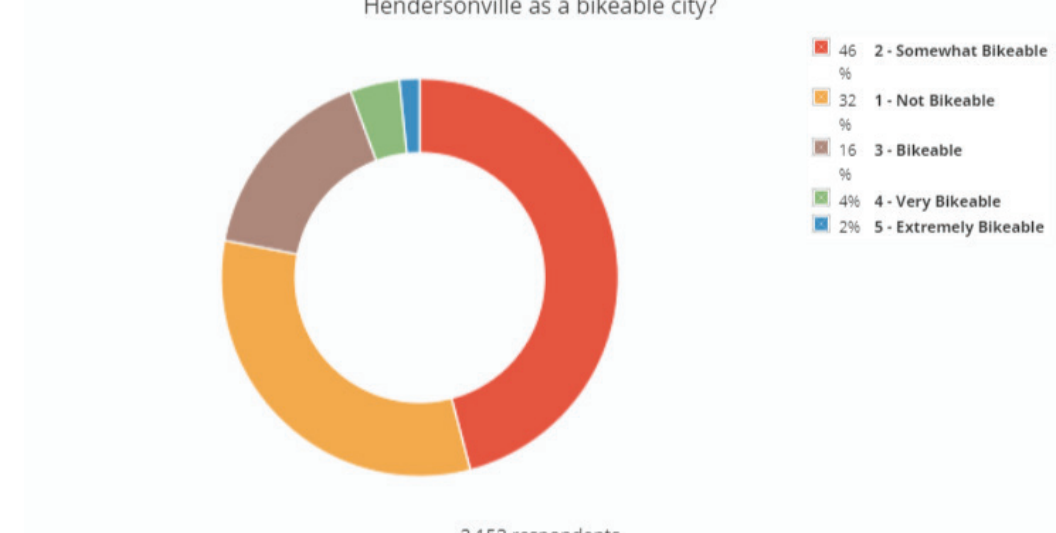
18. Thinking about how the plan could impact Hendersonville's parks, greenspace and greenway facilities over the next 20-40 years, what is most important to you? Please rank.



19. On a scale of 1-5 with 1 not walkable and 5 extremely walkable, how would you rate Hendersonville as a walkable city?



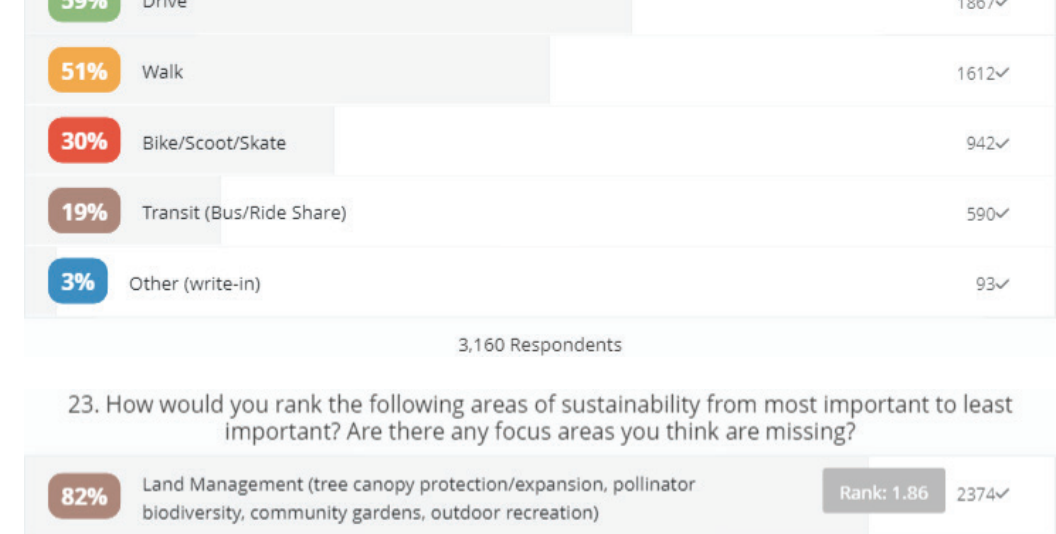
20. On a scale of 1-5 with 1 not bikeable and 5 extremely bikeable, how would you rate Hendersonville as a bikeable city?



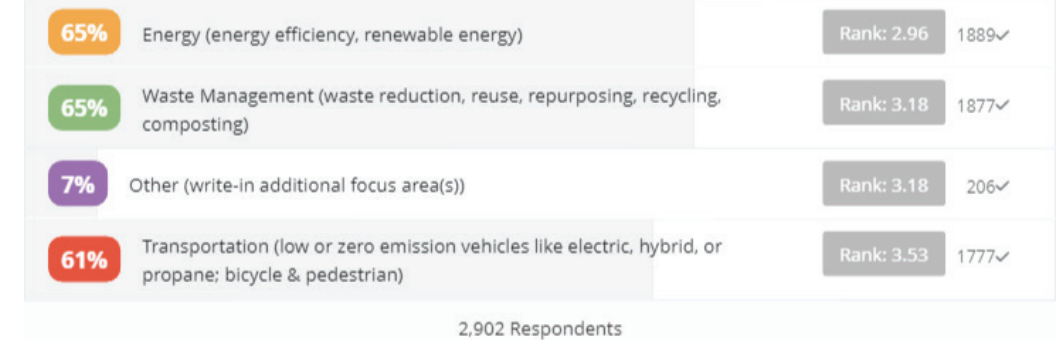
21. What are your priorities for making Hendersonville more walkable and bikeable? Please rank.



22. What would be your ideal way to travel in and around Hendersonville?



23. How would you rank the following areas of sustainability from most important to least important? Are there any focus areas you think are missing?



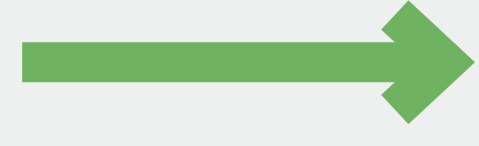


# PROJECT ENGAGEMENT

## Stakeholder Outreach

### STRATEGY:

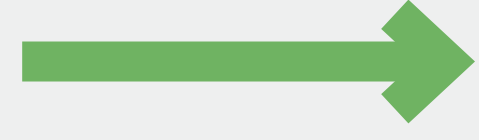
Community Advisory Committee



### WHO IT REACHES:

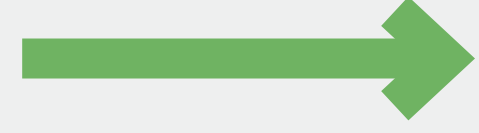
Diverse Stakeholder Group

Technical Committee



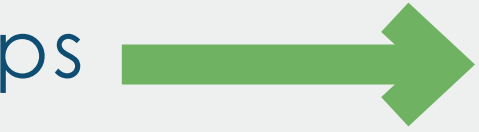
City, County, and State staff

Policy-maker Briefings



Decision Makers

Open Houses & Pop-ups



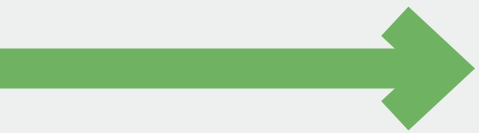
Town Residents & Stakeholders

Neighborhood Canvassing



Lower Participation Groups

Meetings "To Go"



Everyone!

## Engagement Goals

- Identify stakeholder groups
- Utilize a variety of tools, strategies, and activities geared to reaching all identified stakeholder groups
- Meaningful involvement of lower-income and underrepresented populations
- Document engagement
- Gather meaningful feedback Leverage opportunities to collaborate with project partners on outreach efforts
- Ensure that stakeholder questions and concerns are heard and addressed
- Maintain and strengthen the relationships
- Align vision, goals, and recommendations

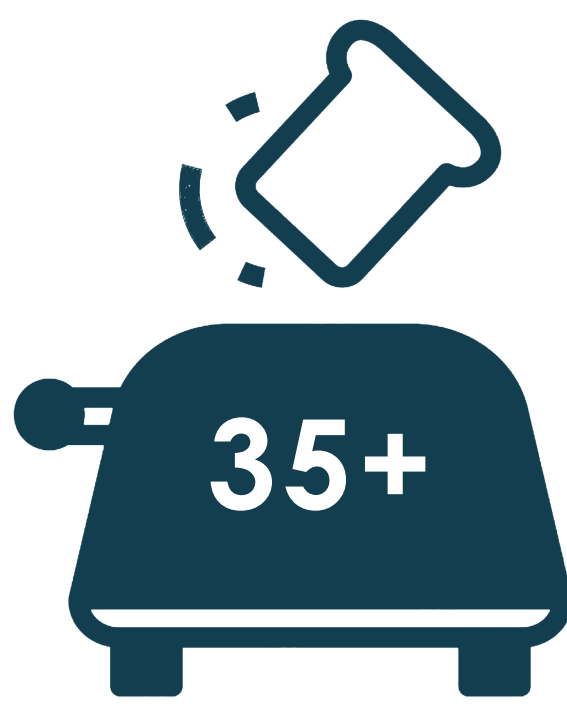
## Public Engagement To Date



Stakeholder Discussions



Policymaker Workshop



Presentations & Pop-Ups



Council Comp-versations



Round Table Discussions



Community Surveys



Take Away Meeting Kits



Community Advisory Committee Meetings

## Building Awareness

- Project Branding
- Print Campaigns
- Media Campaigns
- Lower Participation Population Outreach

## Gathering Input

- Online Tools
- Public Input Survey
- Meeting Facilitation
- Council Comp-versations
- Open Houses
- Pop-up Meetings
- Meetings "To Go"

## Council Comp-versations

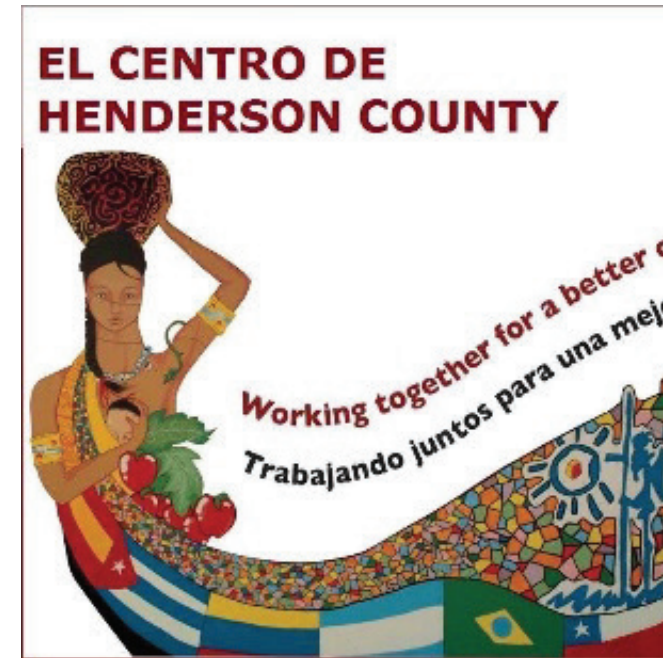
## Take Away Meeting Kits





# PROJECT ENGAGEMENT

## Presentations, Pop-Ups, & Round Tables



## Stakeholder Interviews Topics

- Public Works
- Economic Development (Agriculture)
- Parks, Trails, & Greenways (parks MP consultant)
- Environment, Resiliency, & Sustainability
- Downtown Stakeholders
- Arts, Culture, & Tourism
- Education Providers
- Equity & Inclusion
- Housing
- Senior Population
- Healthcare
- Developers, Large Landholders
- Historic Preservation

## Key Themes

- Balancing growth with hometown character
- Affects of growth
- Workforce availability
- Directing growth to corridors and preserve sensitive areas
- Community health
- Opportunities to improve mobility and connectivity through parks, trails, and greenway networks

## Canvassing in Green Meadows

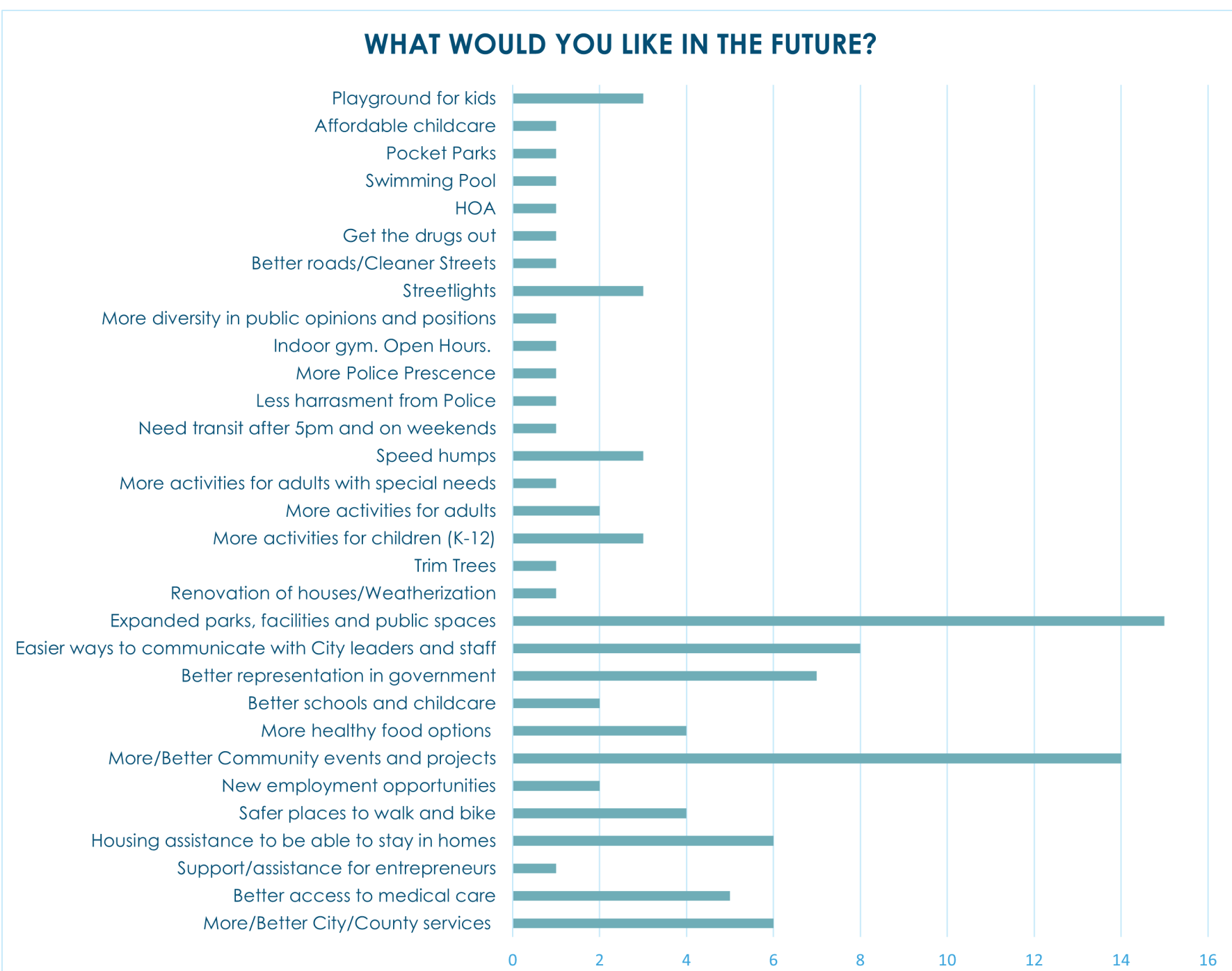
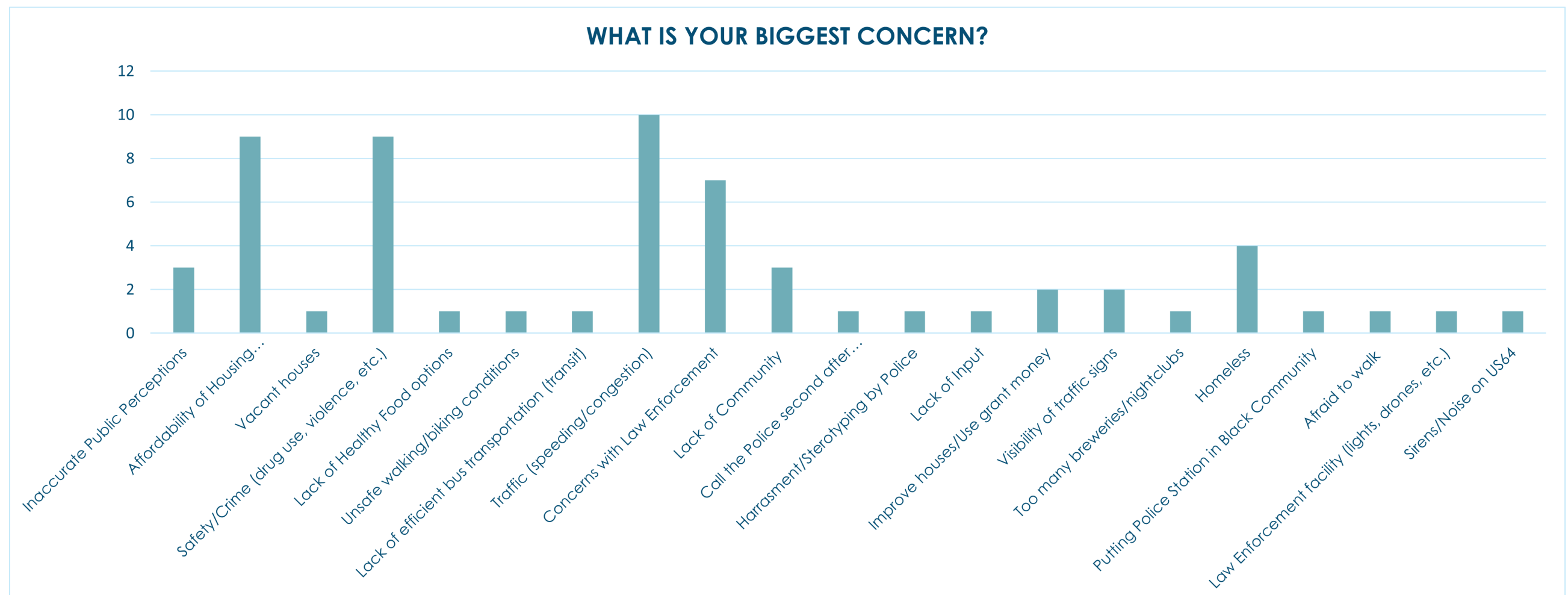
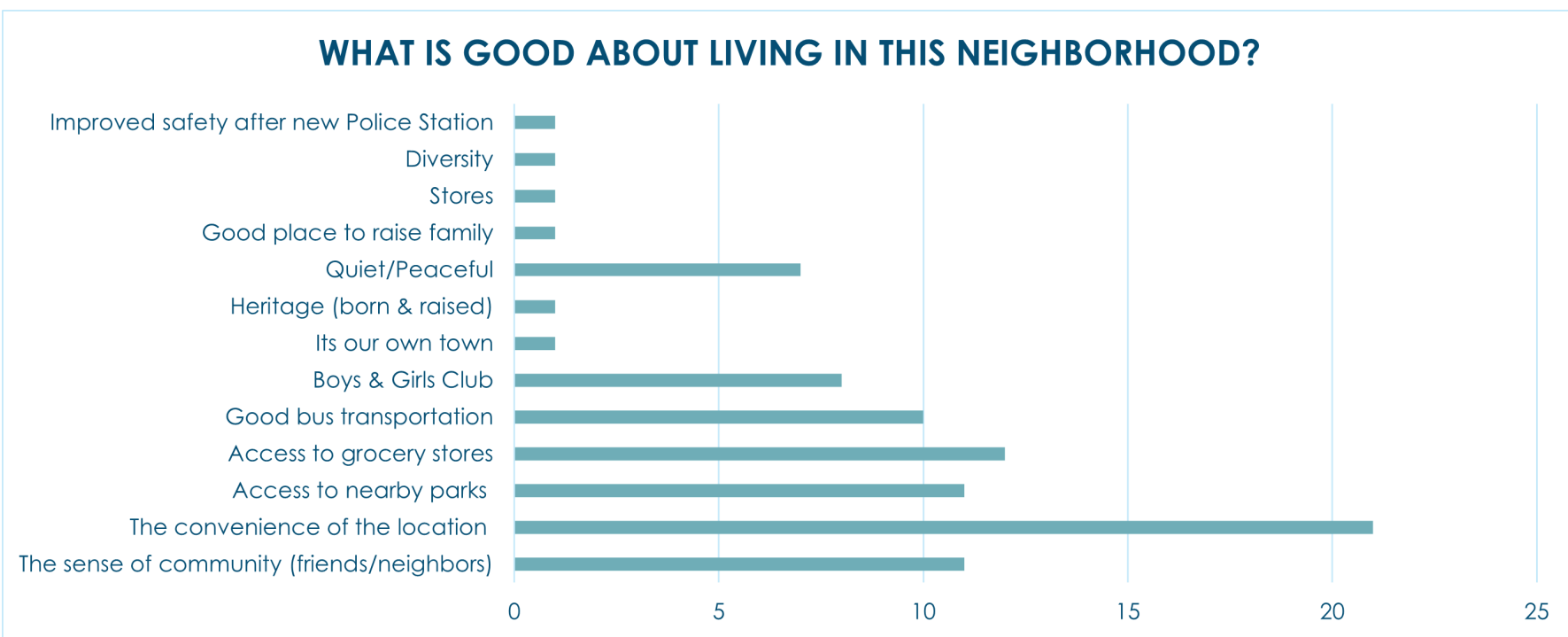
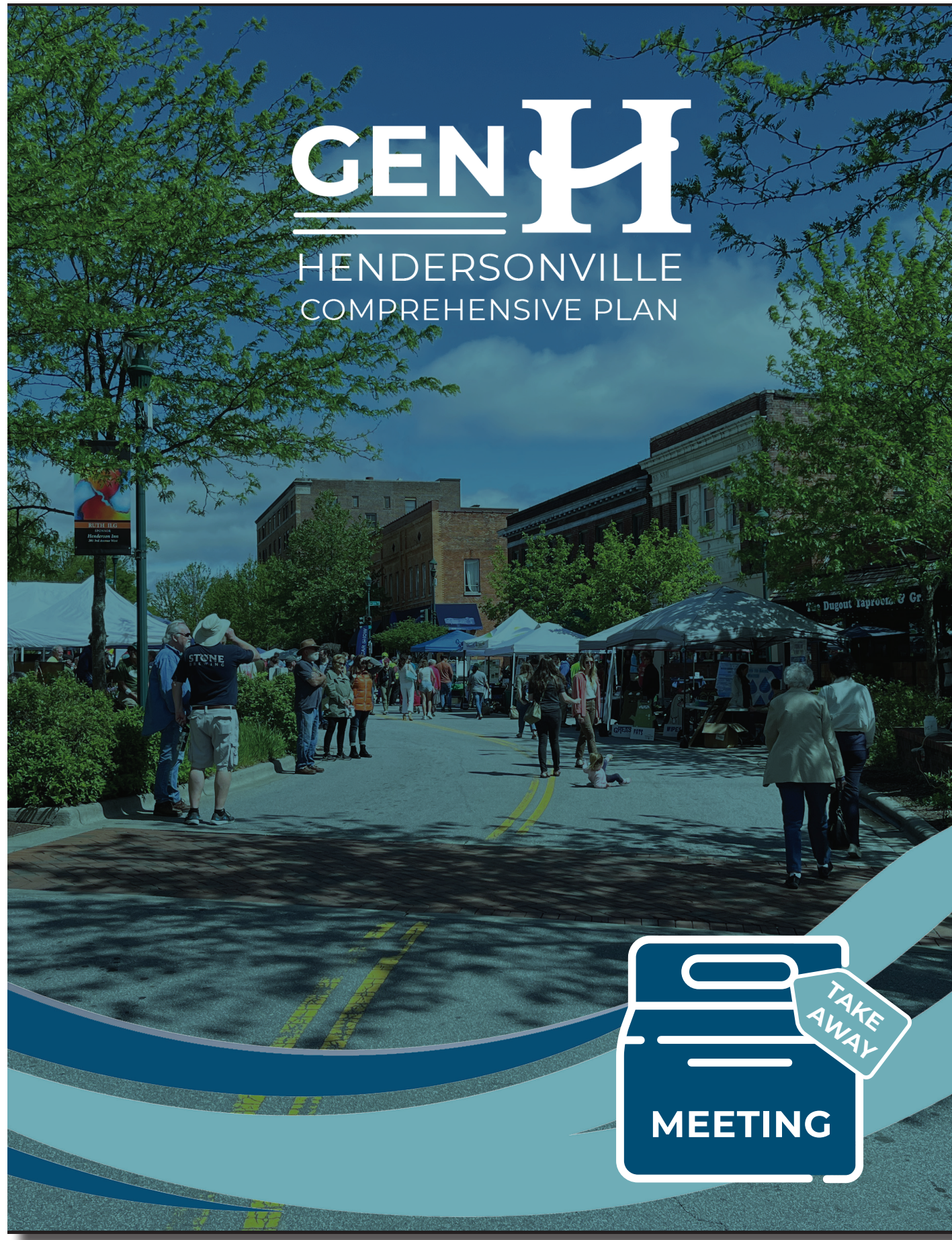


Photo credit: WLOS staff



# TAKE AWAY MEETING KITS

## What is a “Take Away Meeting Kit?”



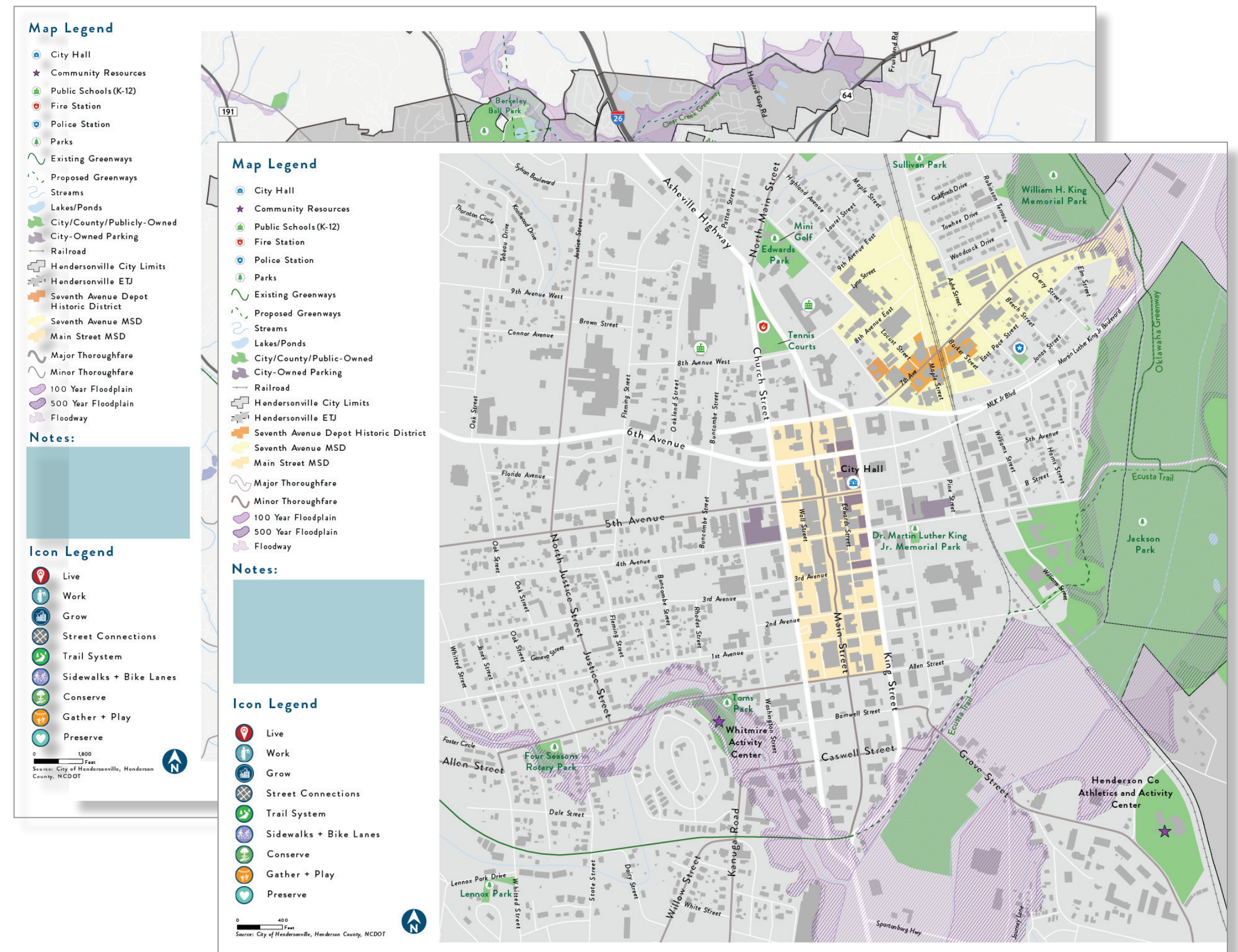
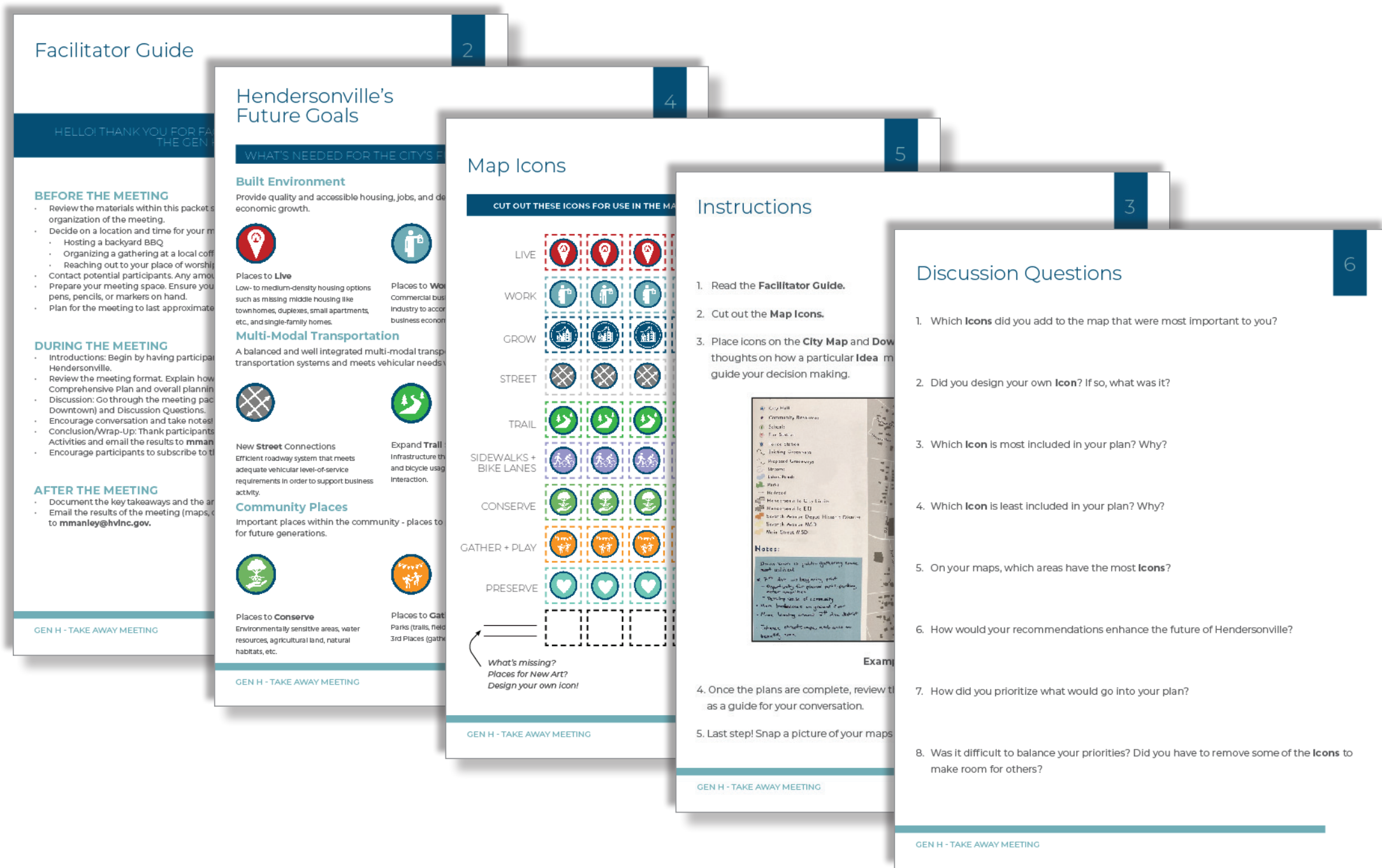
A Take Away Meeting is a tool that can be used to help gather input from the community on the plan. The Take Away Meeting Kit is designed to encourage group discussion about the plan's goals and strategies. The completion of this planning activity can ensure that the plan is truly reflective of your community's vision for the future!



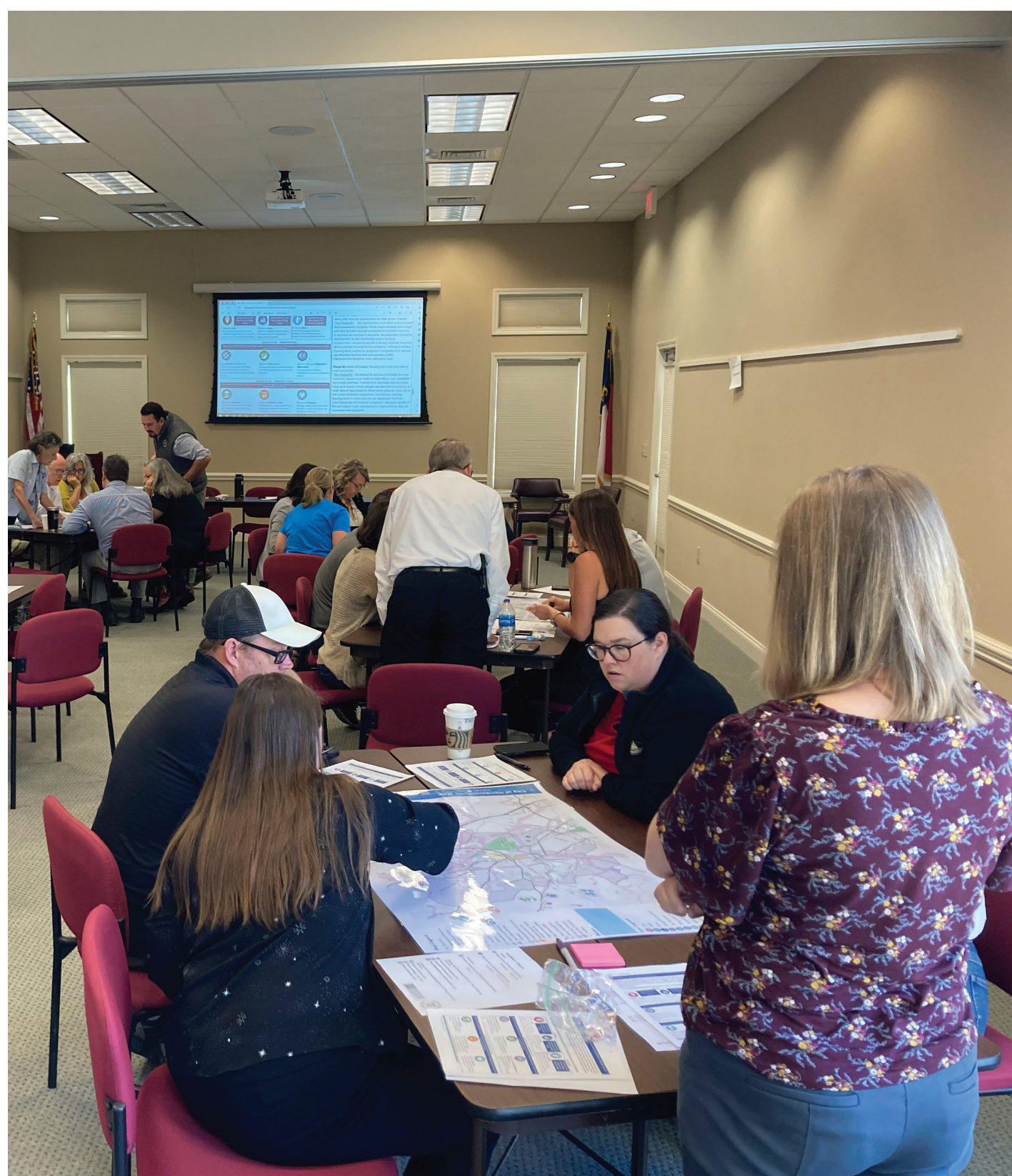
## What is in the Meeting Kits:

1. Introduction
2. Facilitator Guide
3. Instructions
4. Hendersonville's Future
5. Map Icons
6. Discussion Questions
7. City Map
8. Downtown Map

## Meeting Kits



## Facilitated Events



At events and pop-ups, facilitators presented an overview of the Gen H planning process with the community. The facilitators led various discussion prompts and showed community members how they to provide their input.

At breakout tables, facilitators guided community members on discussing different issues and opportunities and allowed them to give their own feedback about Hendersonville on the city-wide and downtown maps provided.

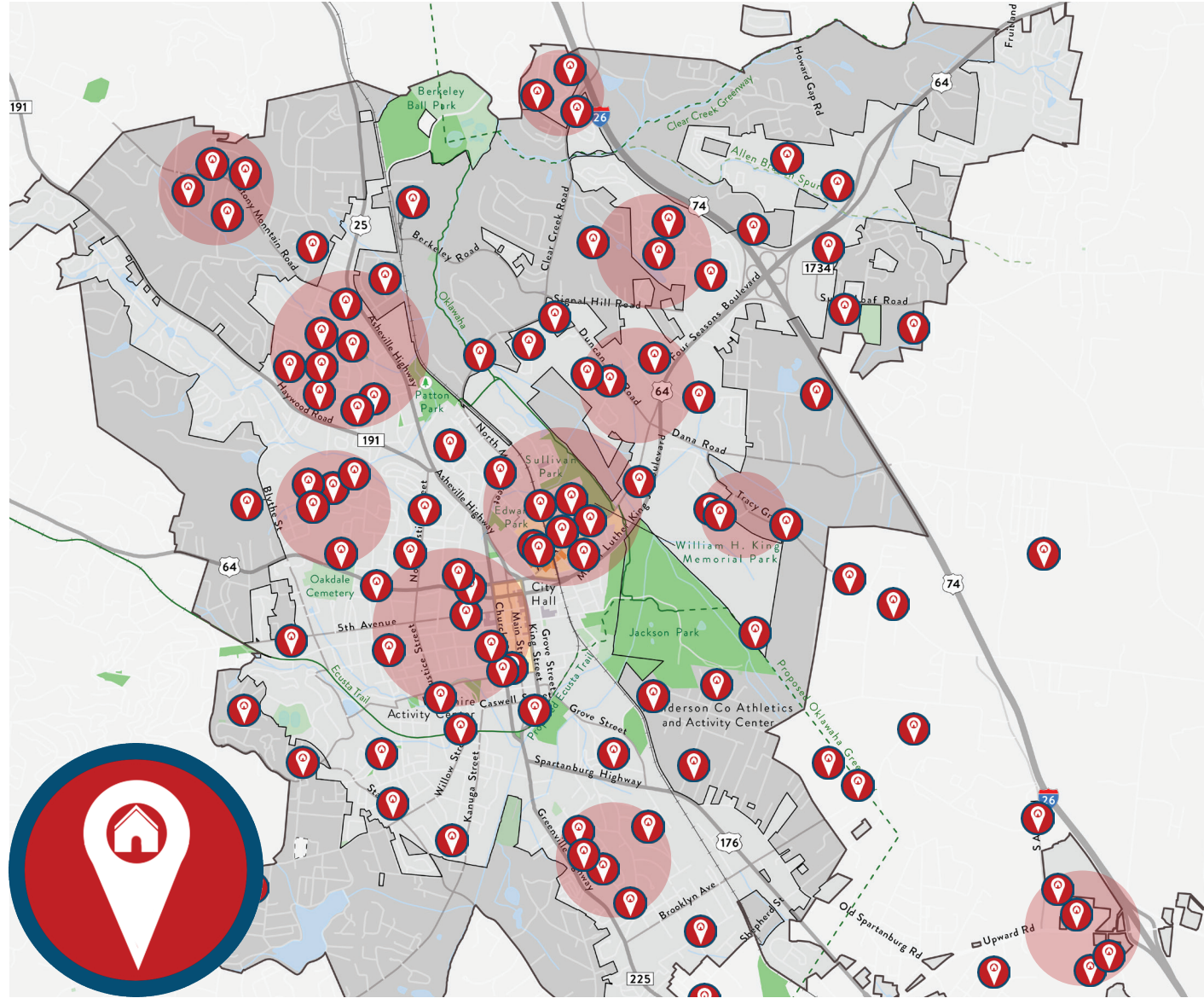




# TAKE AWAY MEETING INPUT

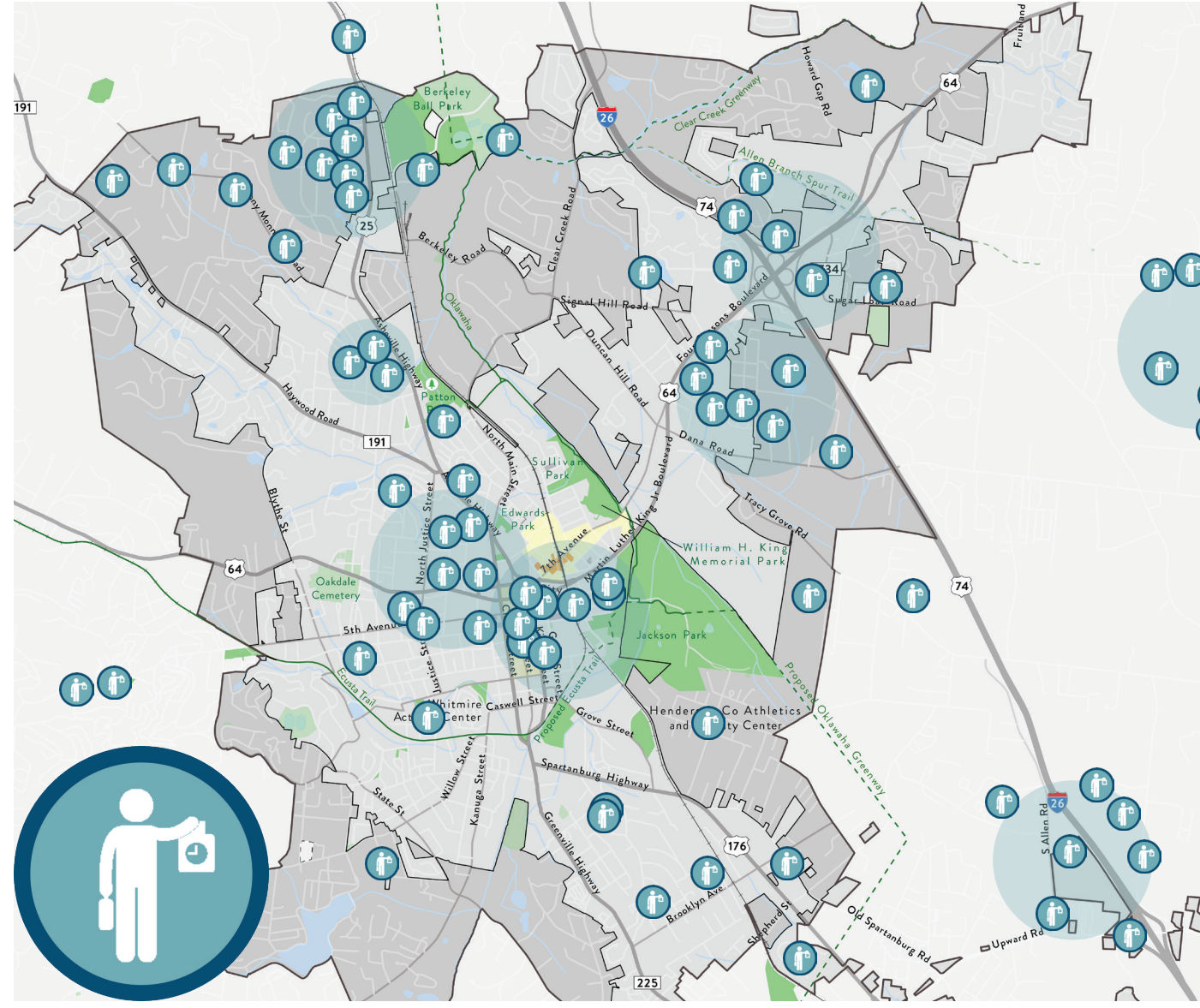
## Built Environment

Provides quality and accessible housing, jobs, and developments that match community needs and support economic growth.



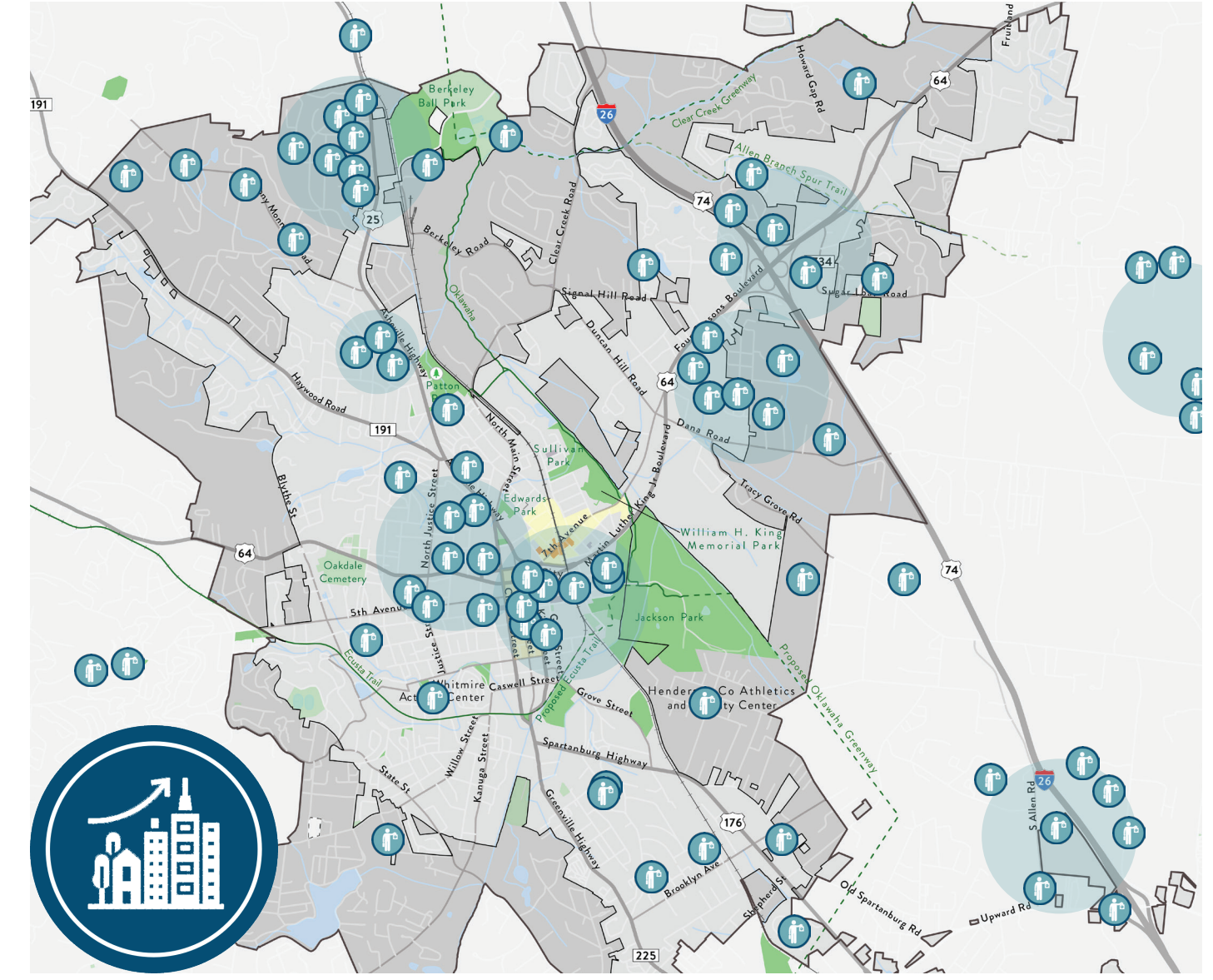
### Places to Live

Low- to medium-density housing options such as missing middle housing like townhomes, duplexes, small apartments, and single-family homes.



### Places to Work

Commercial businesses, offices, and industry to accommodate a growing business economy and job base.

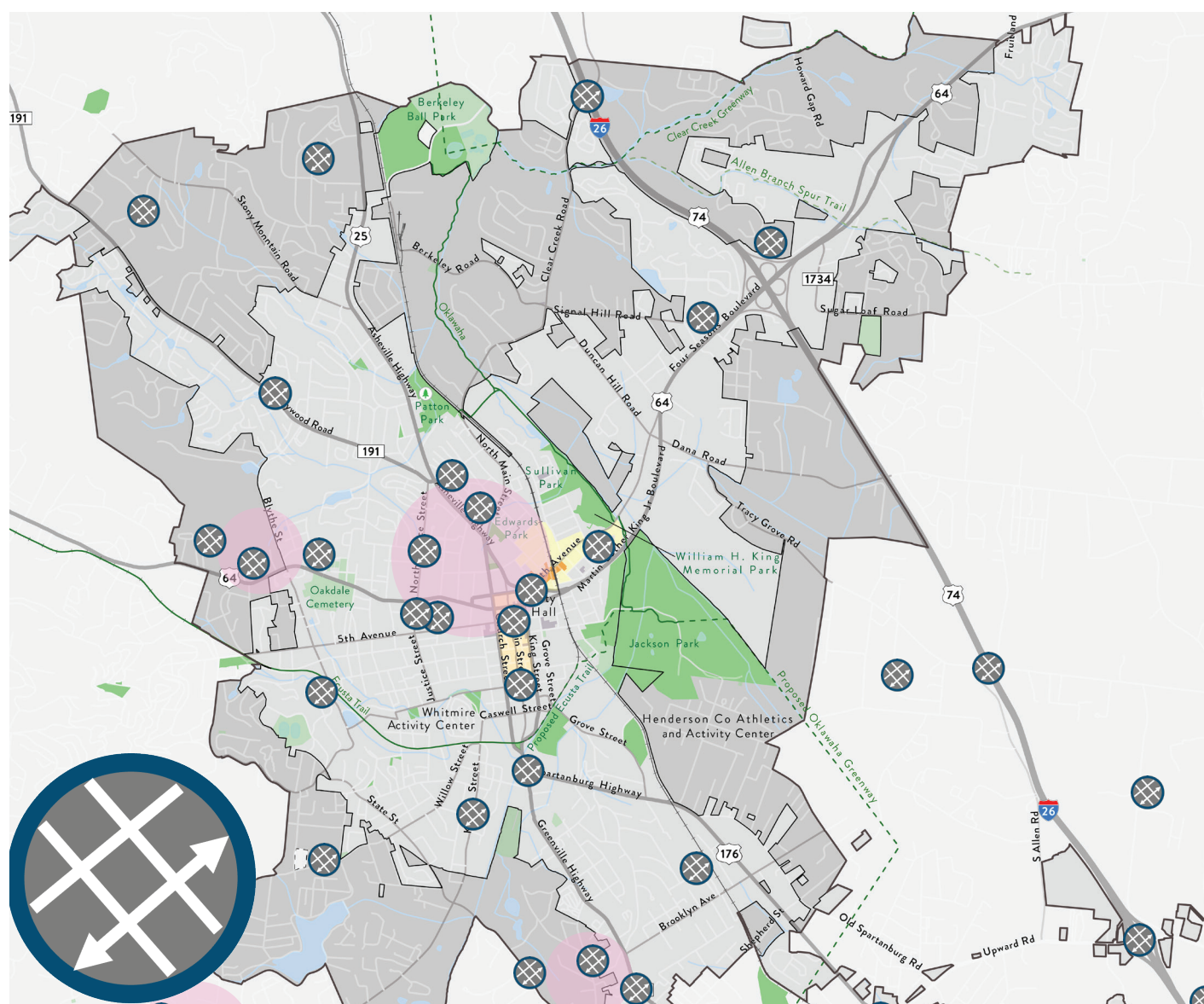


### Places to Grow

Walkable mixed-use developments that place people and housing close to shopping, jobs, school, and other activities.

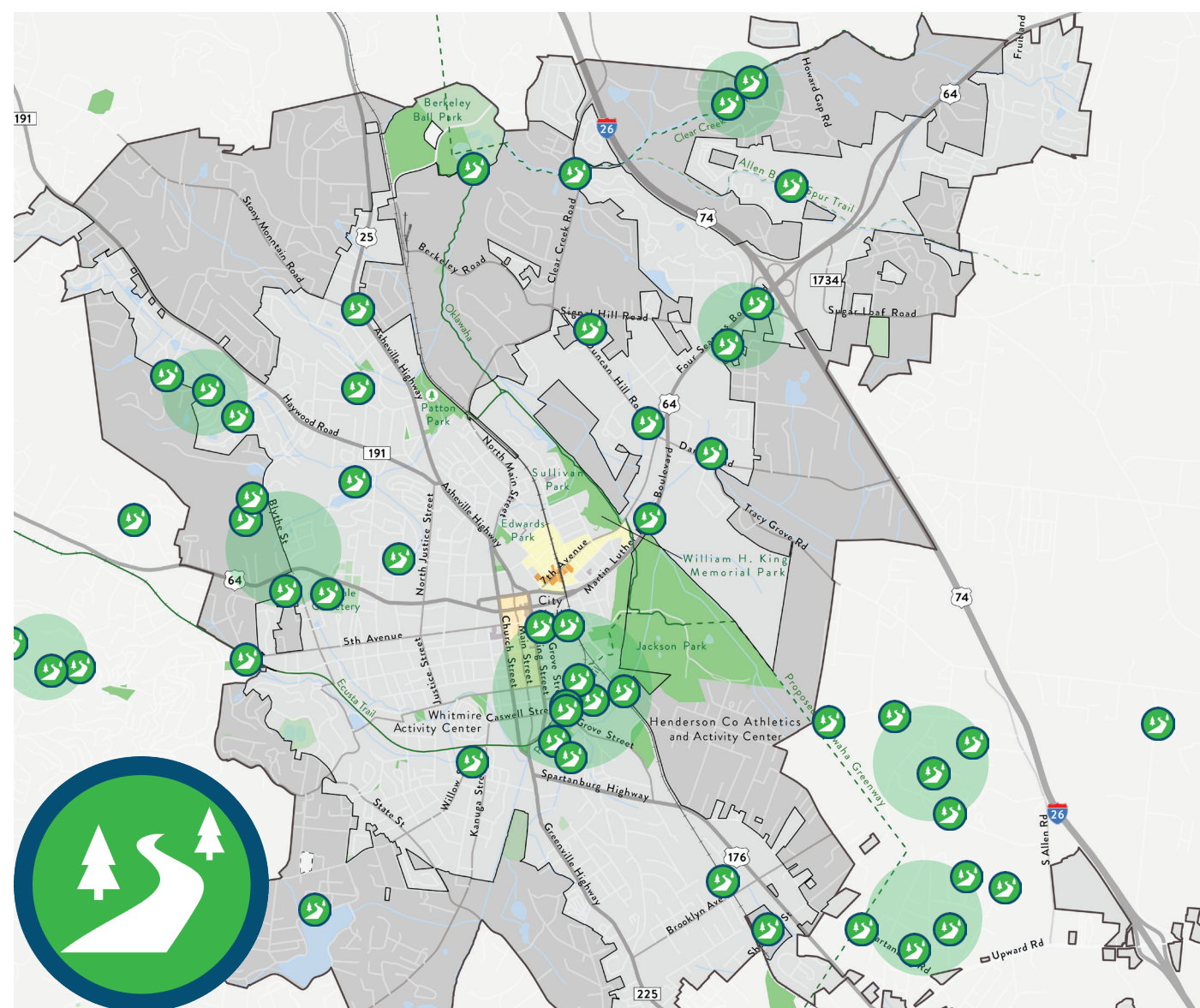
## Multi-Modal Transportation

A balanced and well integrated multi-modal transportation system that is interconnected with regional transportation systems and meets vehicular needs without compromising other goals.



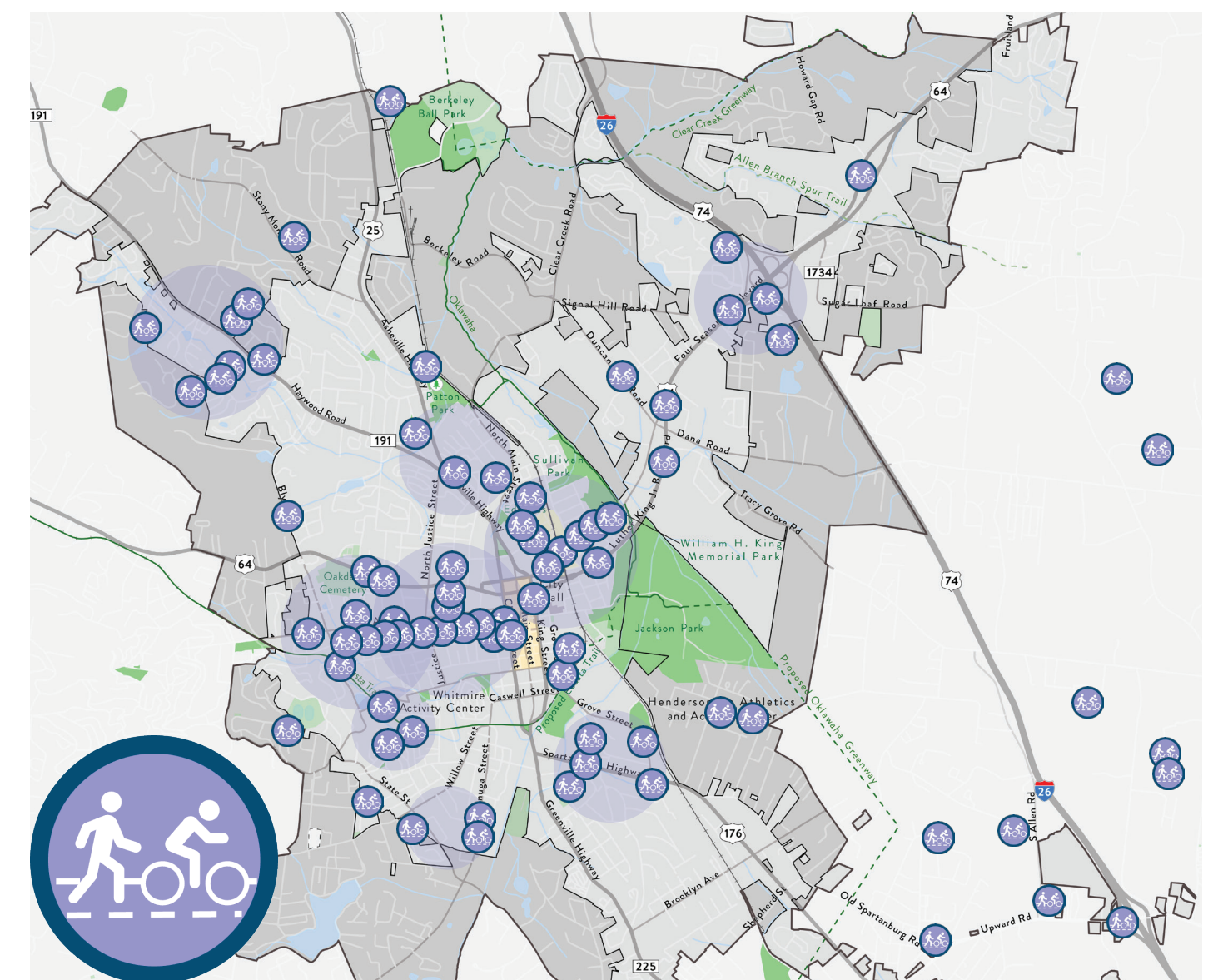
### New Street Connections

Efficient roadway system that meets adequate vehicular level-of-service requirements in order to support business activity.



### Expanded Trail Network

Infrastructure that encourages pedestrian and bicycle usage, safety, and community interaction.

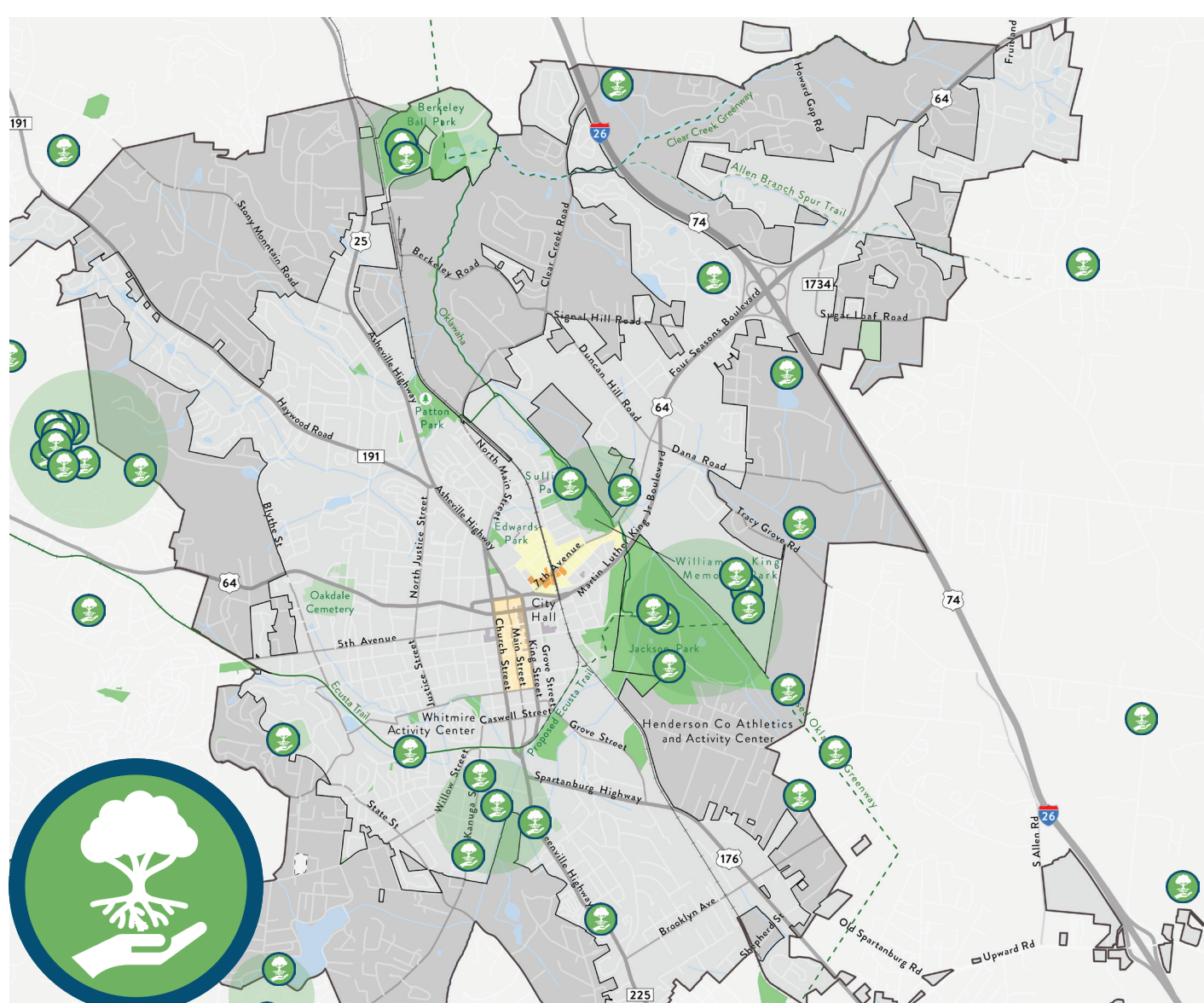


### New or Improved Sidewalks + Bike Lanes

Promoting safe and walkable neighborhoods through a well-designed network.

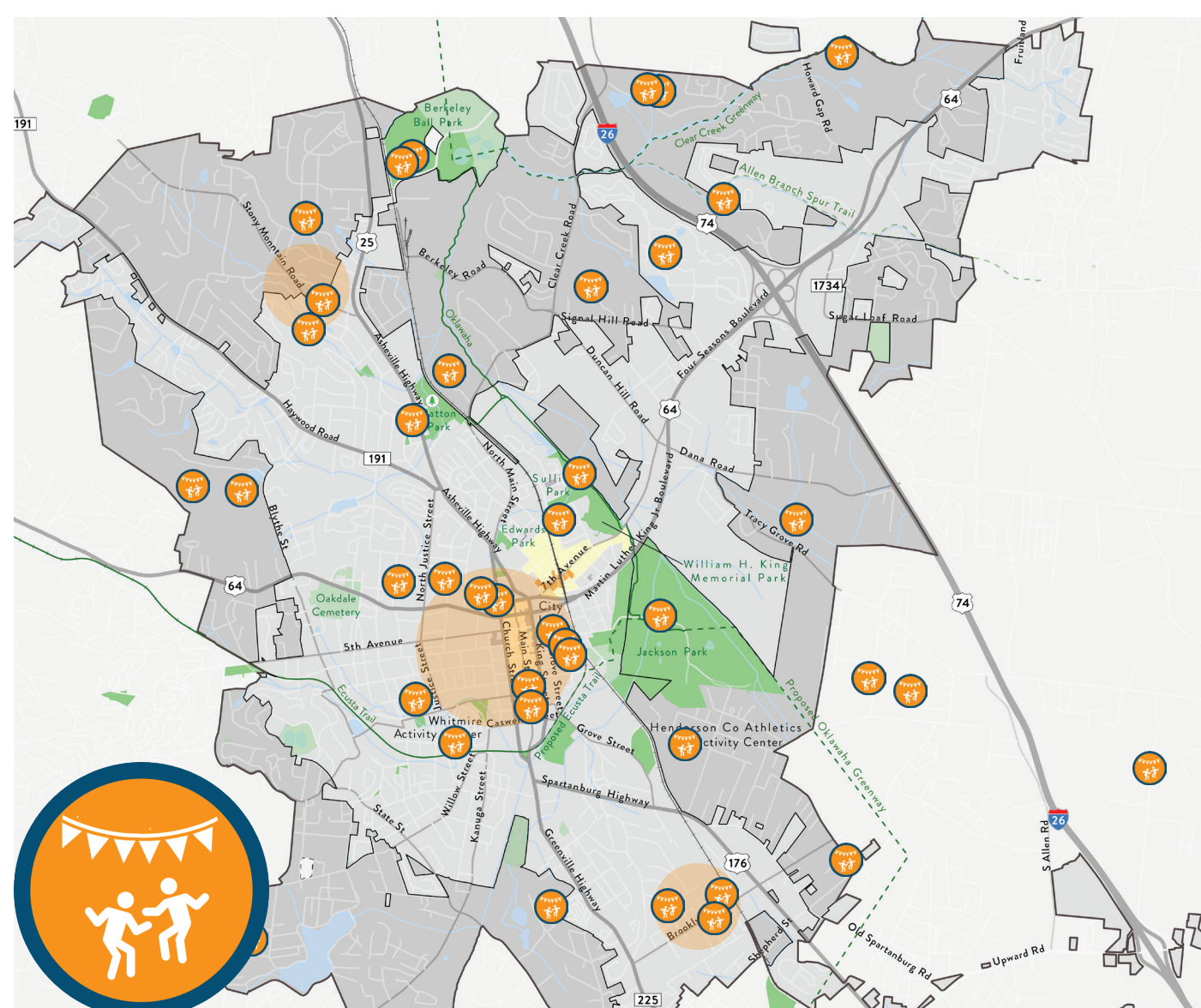
## Community Places

Important places within the community - places to preserve, places to gather and play, and places to preserve for future generations.



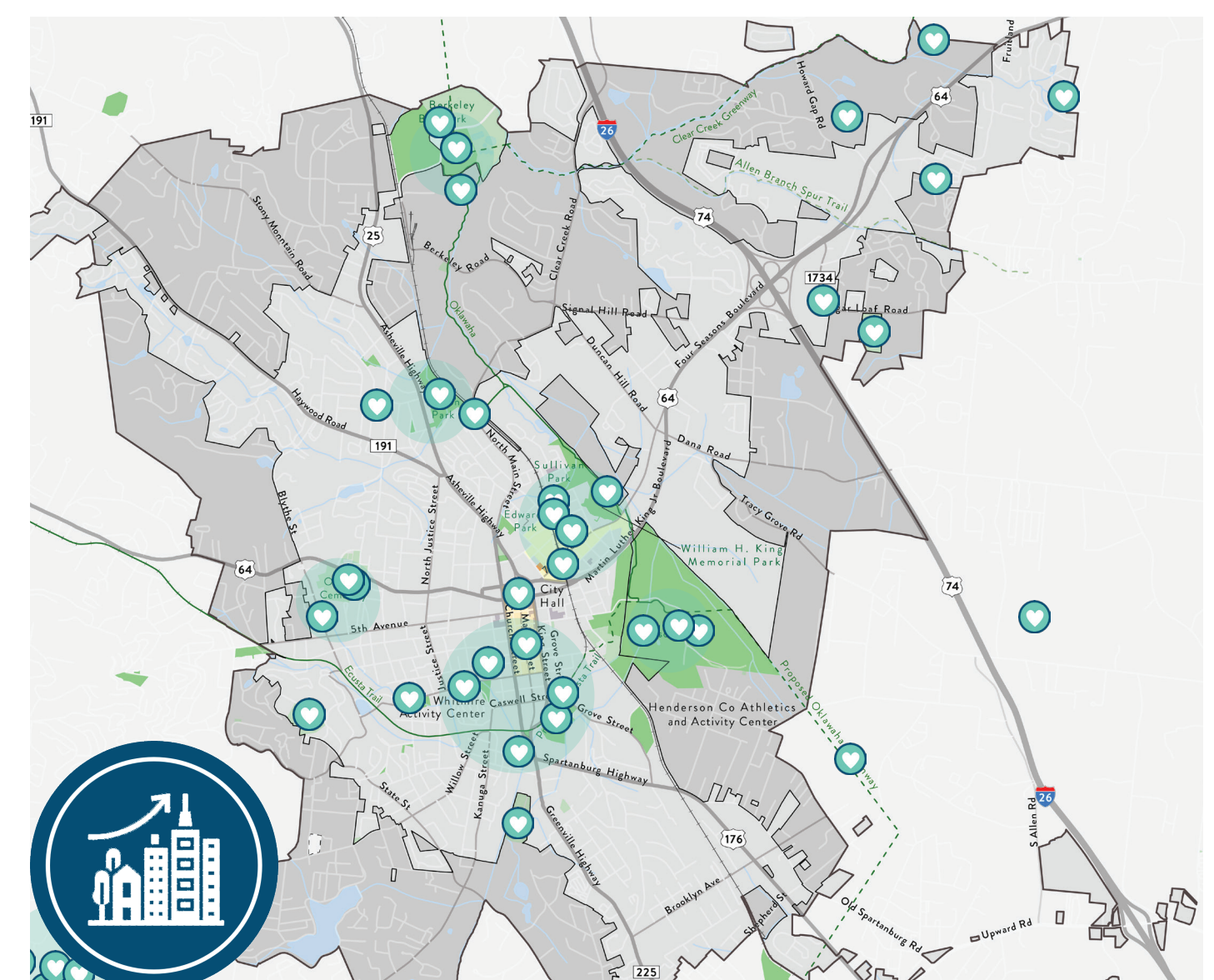
### Places to Conserve

Environmentally sensitive areas, water resources, agricultural land, natural habitats, etc.



### Places to Gather + Play

Parks and 3rd Places (gathering places for social interaction, i.e. coffee shops, breweries, libraries, neighborhood-scale events, etc.)



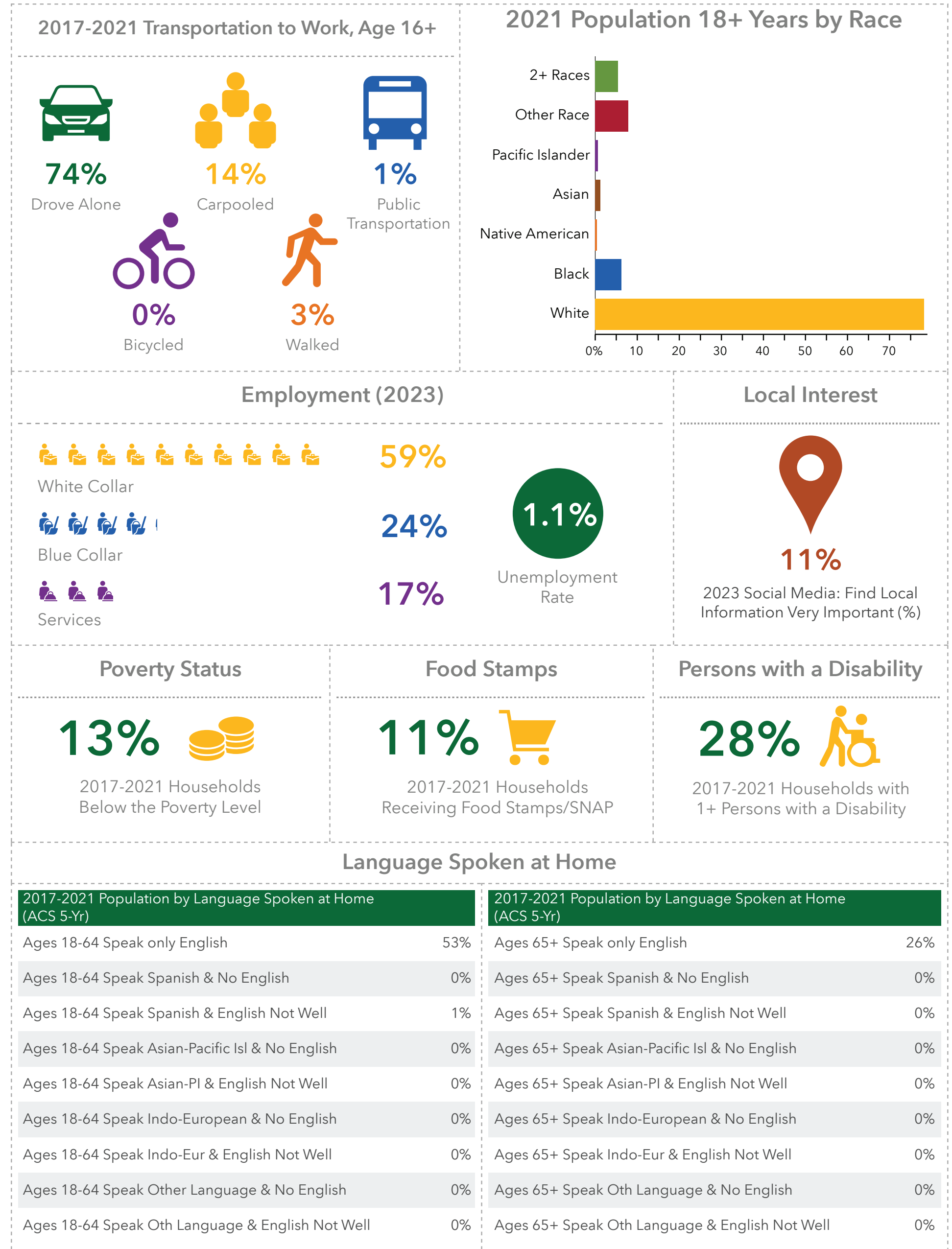
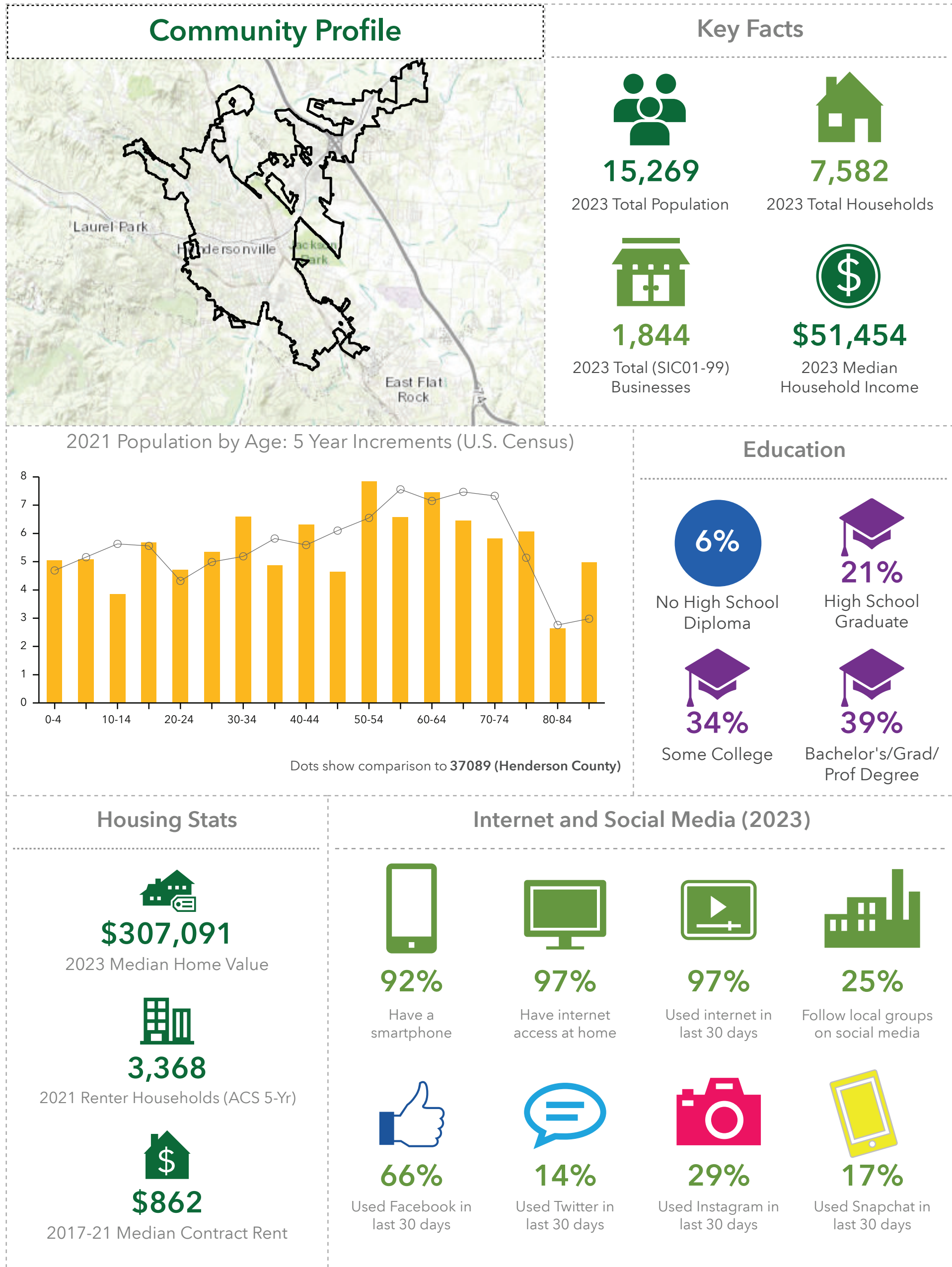
### Places to Preserve

Buildings, neighborhoods, and cultural sites that maintain a rich heritage and promote local character.

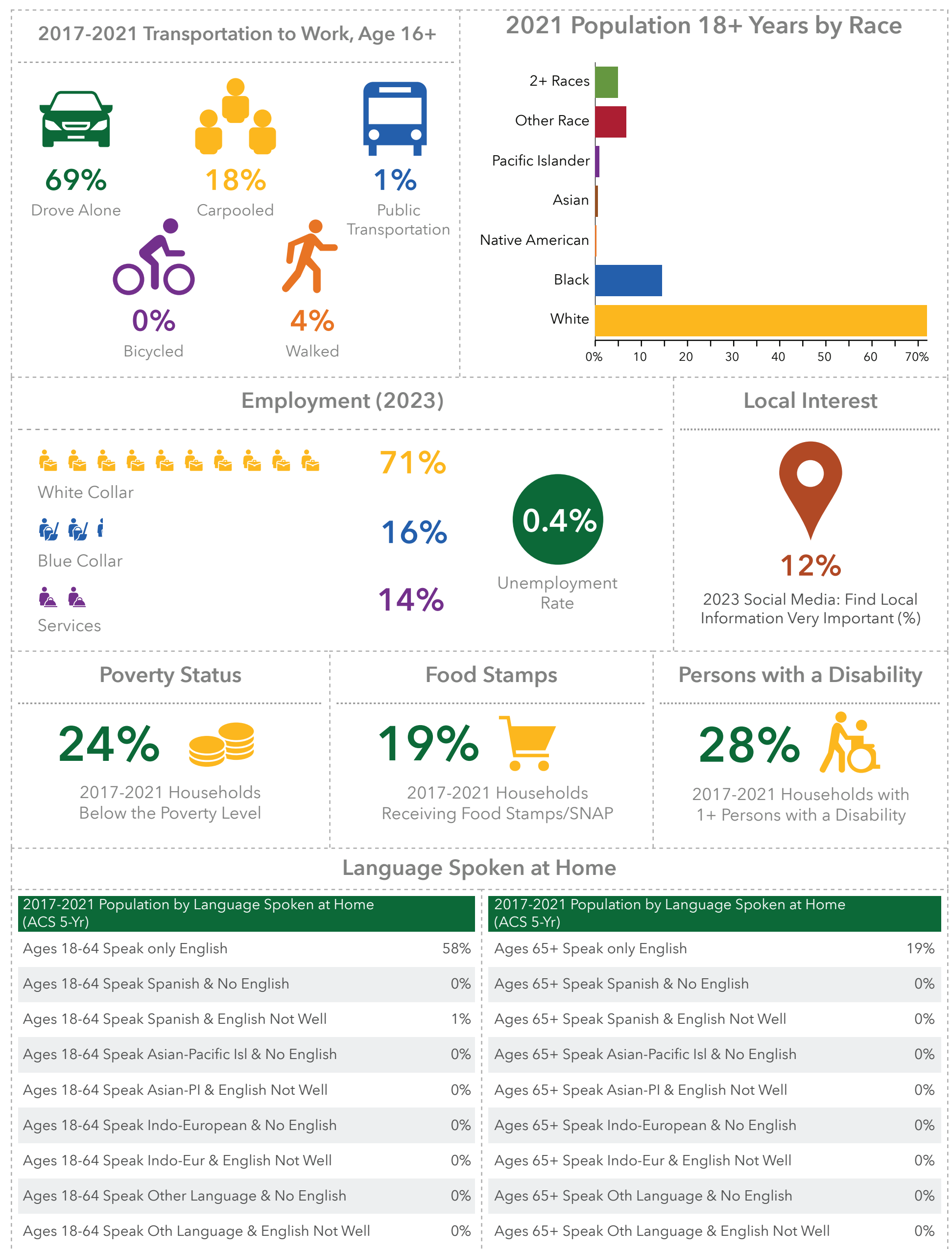
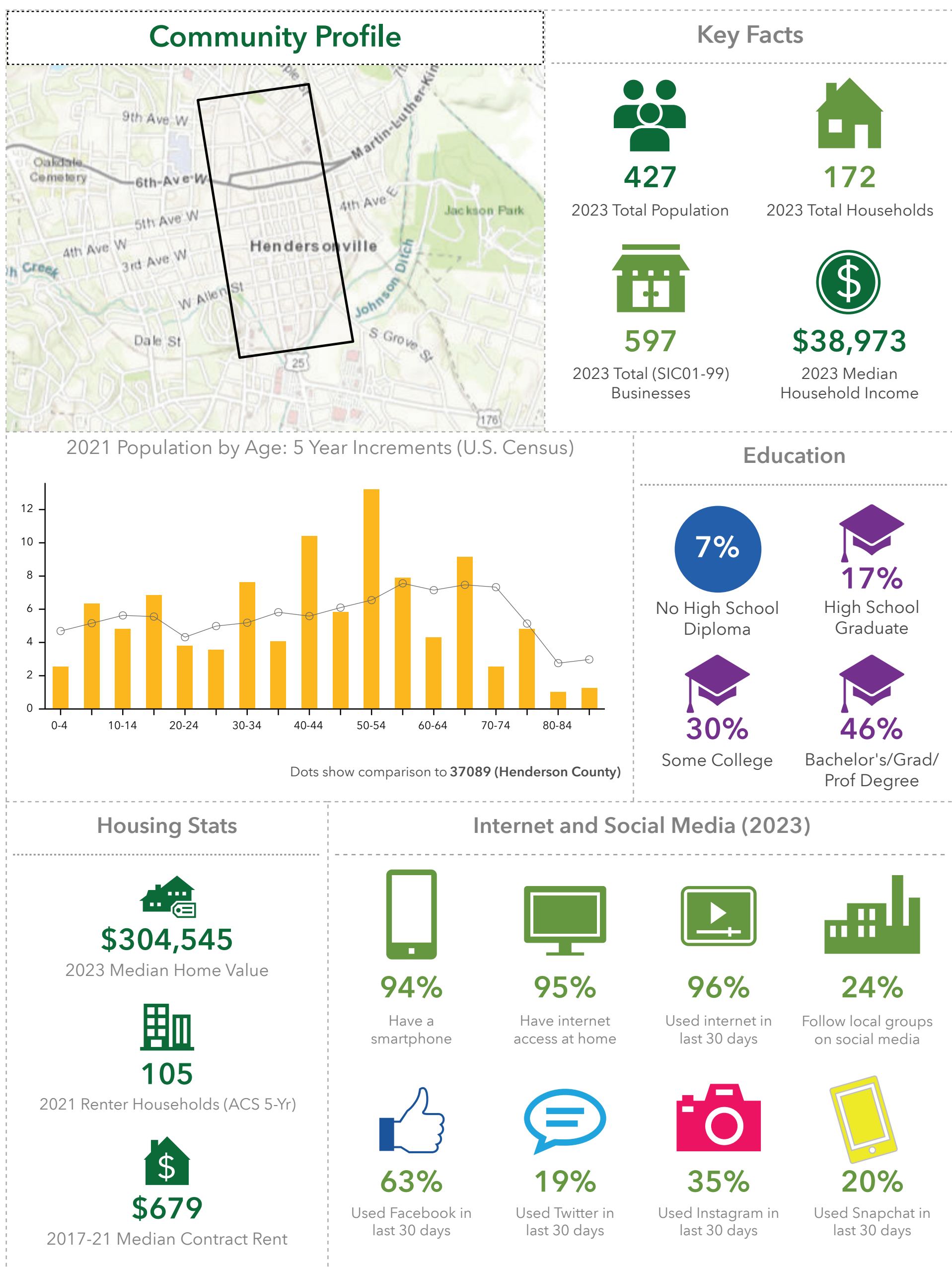


# DEMOGRAPHICS

## City-wide



## Downtown





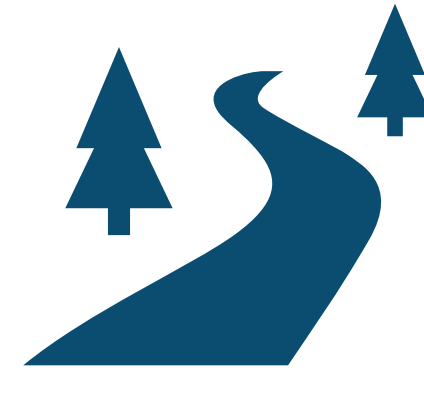
# GOALS & OBJECTIVES

Do these align with your vision for Hendersonville's future?  
Is there anything you would like to add?



## Vibrant Neighborhoods

- Safe
- Well-maintained
- Diverse
- Connected



## Safe Streets & Trails

- Access: walking, biking, transit, automobile, Mobility-as-a-Service (MaaS, e.g., Uber, Lyft, scooters, etc.)
- Walkable development
- Active living



## Abundant Housing Choices

- Availability of types (options)
- Affordability
- Housing condition/quality



## Satisfying Work Opportunities

- Lucrative job options
- Vocation-/career-building activities
- Enrichment, growth
- Community volunteer opportunities



## Healthy & Accessible Natural Environment

- Recreation, passive open space
- Water quality
- Natural system capacity (floodplains for stormwater; habitats to support flora/fauna; tree canopy for air quality, stormwater management, and )
- Compact development form (infill, redevelopment) minimizing ecological footprint
- Working landscapes (e.g., orchards, managed forests)



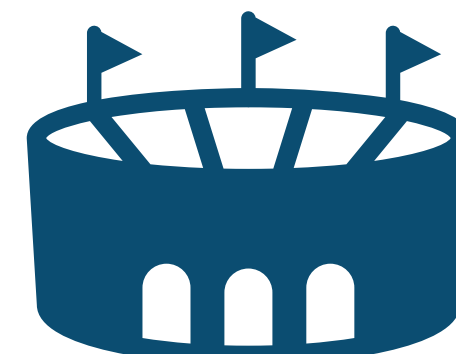
## Welcoming & Inclusive Community

- Respectful community dialogue
- Inviting public realm (i.e., parks, public buildings)
- ADA accessibility



## Authentic Community Character

- Downtown
- Gateways
- Historic preservation
- Arts and cultural activities
- Quality development
- Local businesses



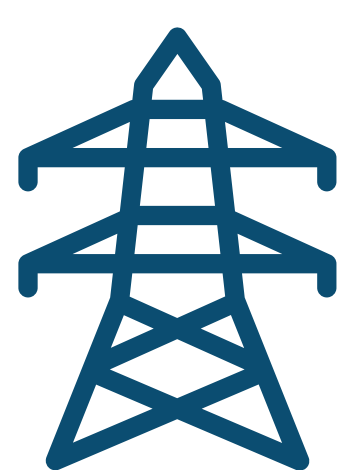
## Accessible & Available Community Uses and Services

### PRIVATE:

- Retail, restaurants, entertainment, etc.

### PUBLIC:

- Sound/efficient government, civic engagement
- Education
- Recreation, active
- Health and well-being
- Public safety



## Reliable & Accessible Utility Services

- Safe drinking water
- Wastewater treatment
- Broadband
- Renewable energy
- Compact service area (infill, redevelopment) for utilization of existing infrastructure

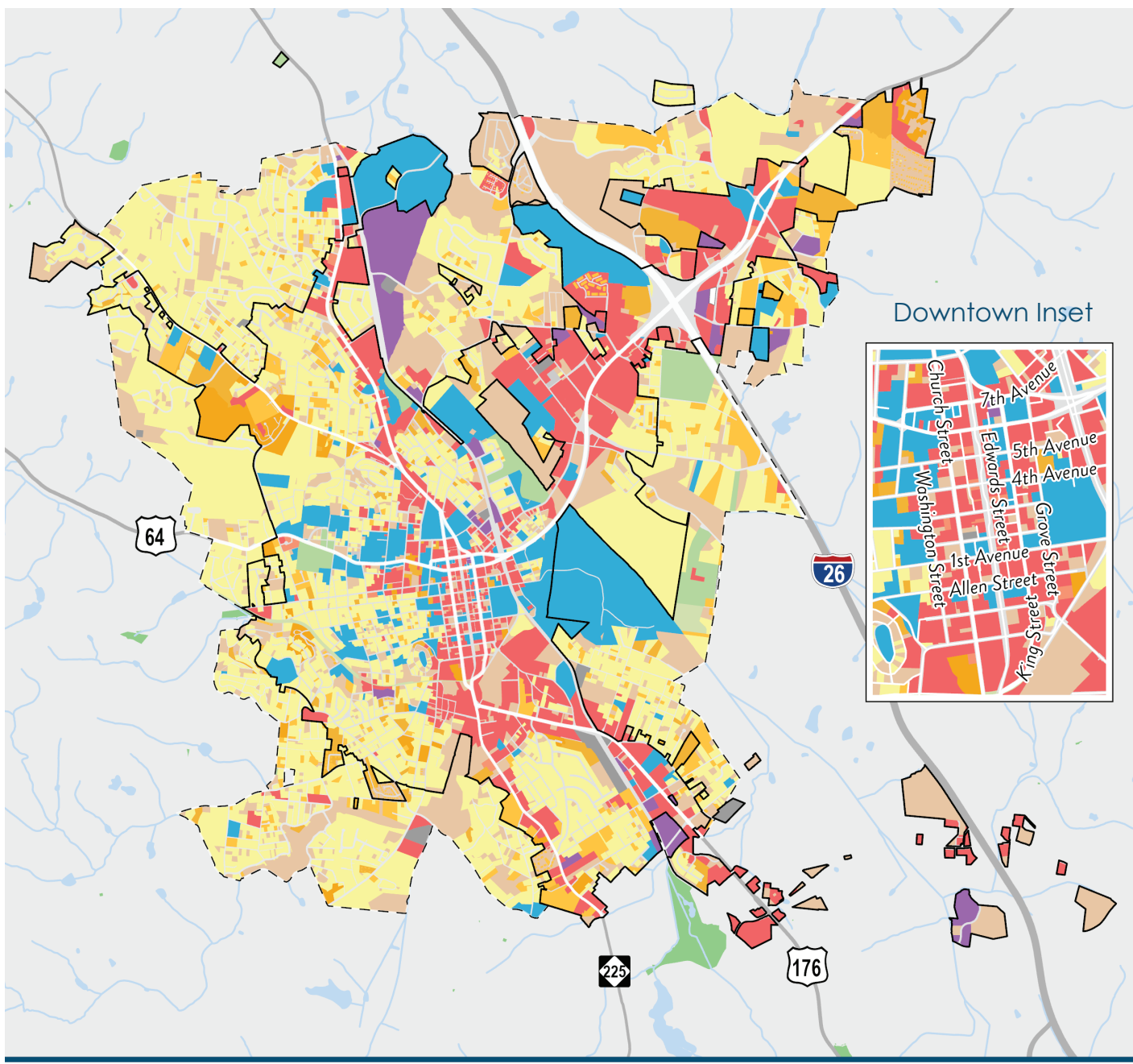


## Resilient Community

- Adaptation to a changing world (e.g., economic, technological, social, environmental)
- Readiness; preparation to manage external impacts
- Recovery from adverse events (e.g., extreme weather event, natural hazards)
- Fiscally healthy government



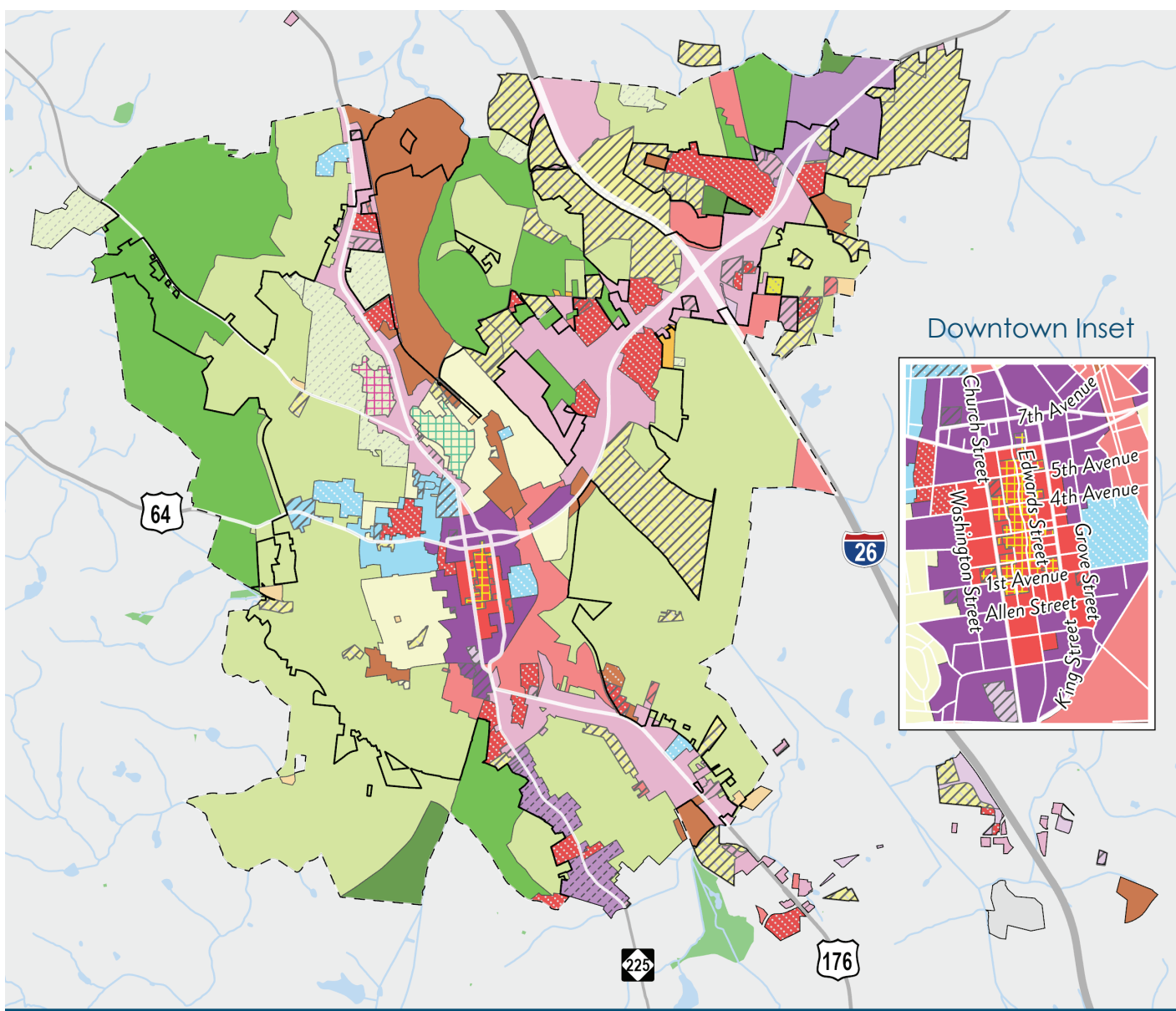
# GROWTH & DEVELOPMENT



## Existing Land Use

- The existing land use plan for Hendersonville was initially developed in 1964, with major revisions in 1970 and 1980, and completely updated in 2009.
- Majority of the existing land use in the city limits and in the extra-territorial jurisdiction is single family covering 47.49% of all the land combined.
- Vacant land takes up 17.58% of all the land within the city limits and the ETJ.

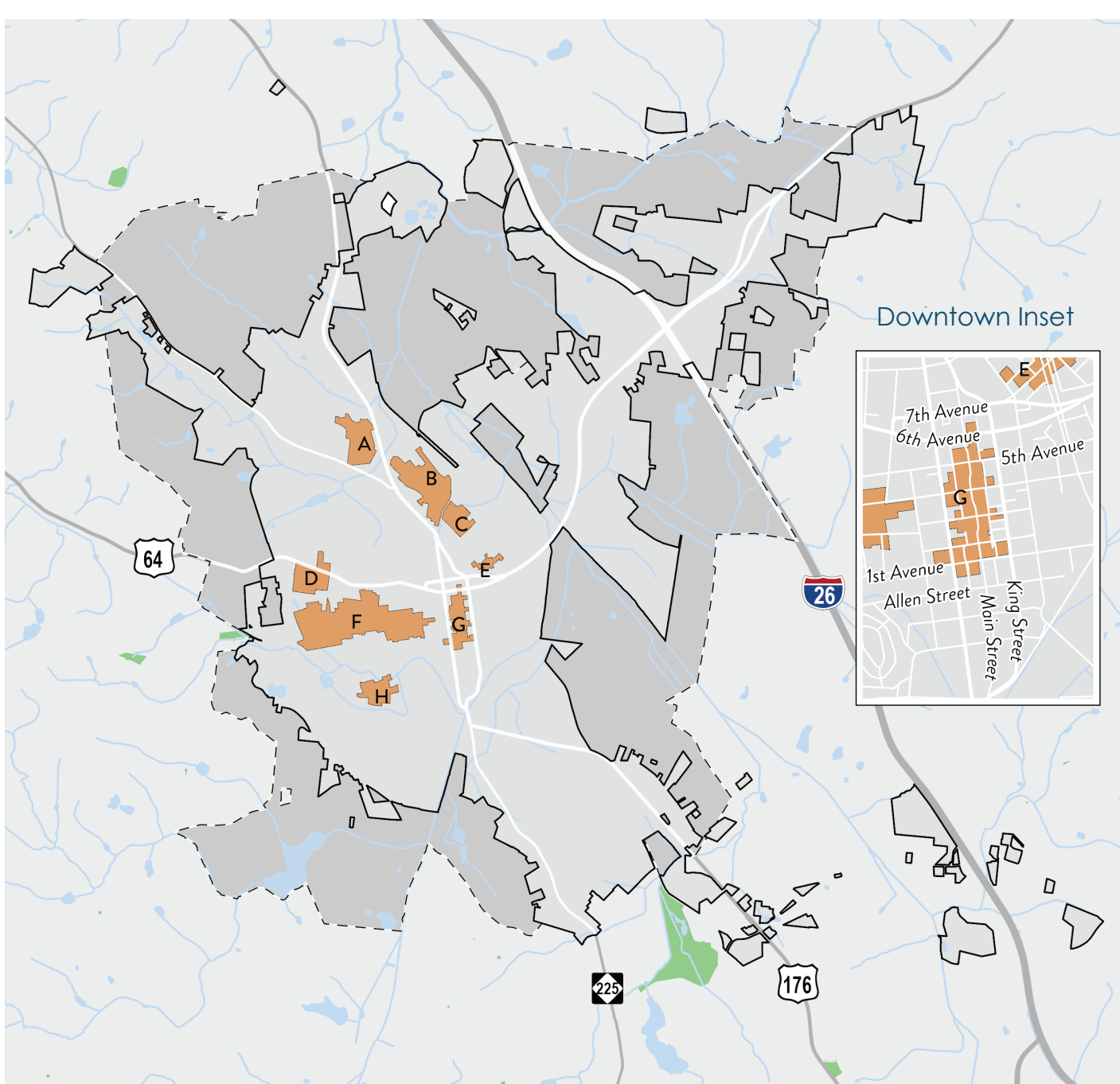
Share your thoughts...



## Zoning

- Zoning is a regulatory tool used to control land use and establish guidelines for development within specific areas or districts. It involves dividing land into different zones and setting regulations for each zone.
- Within the city limits, majority of the land is zoned R-15 Medium Density Residential (25.83%), and in the extra-territorial jurisdiction, R-15 Medium Density Residential covers 48.66% of the land.

Share your thoughts...



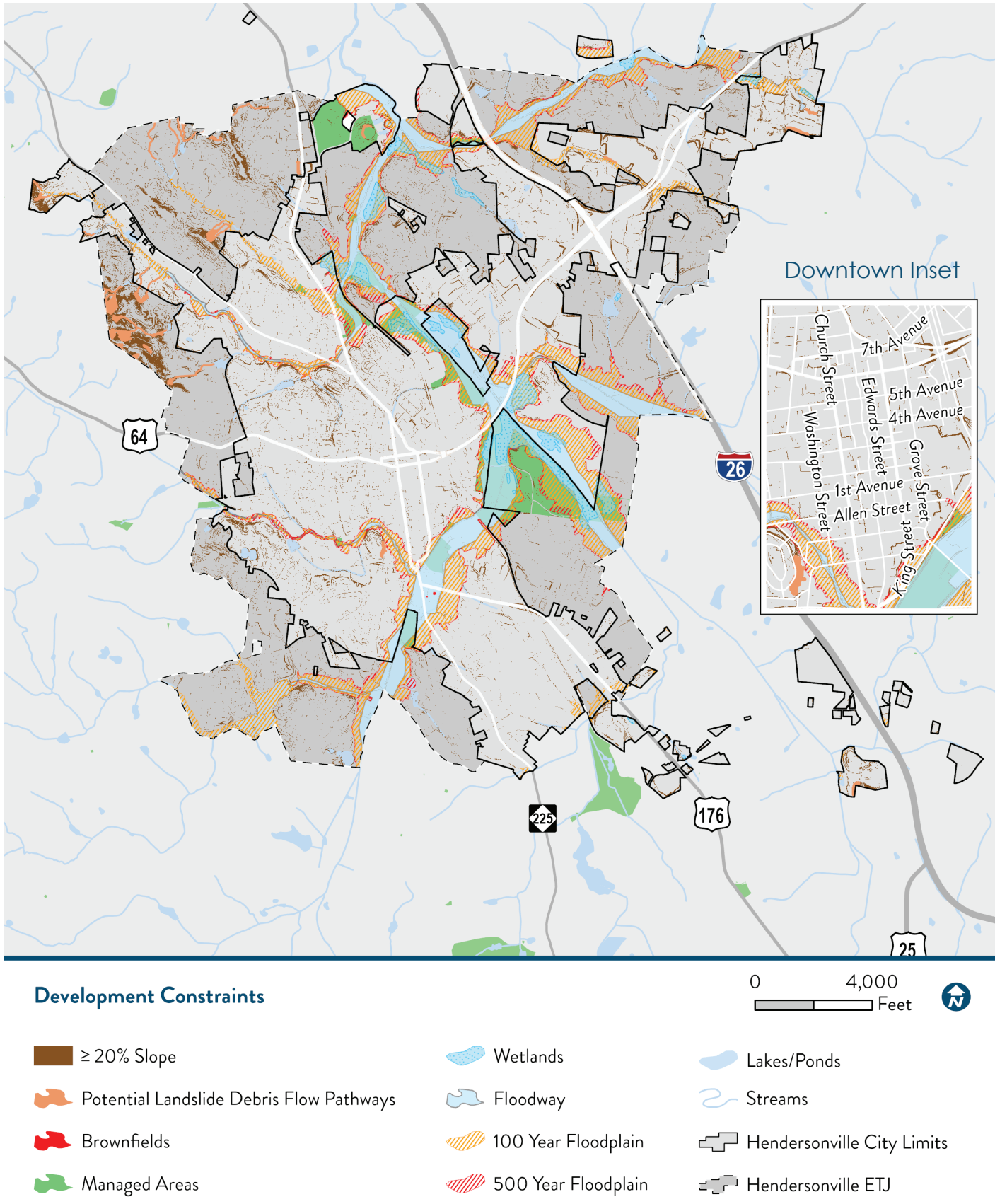
## Historic Districts

- The city actively promotes historic preservation initiatives, ensuring the protection and maintenance of its significant buildings.
- The listed historic districts in the city boundary include: Druid Hills, Hyman Heights, Cold Springs Park, Oakdale Cemetery, Seventh Avenue Depot, West Side, Main Street, and Lenox Park Historic Districts.

Share your thoughts...



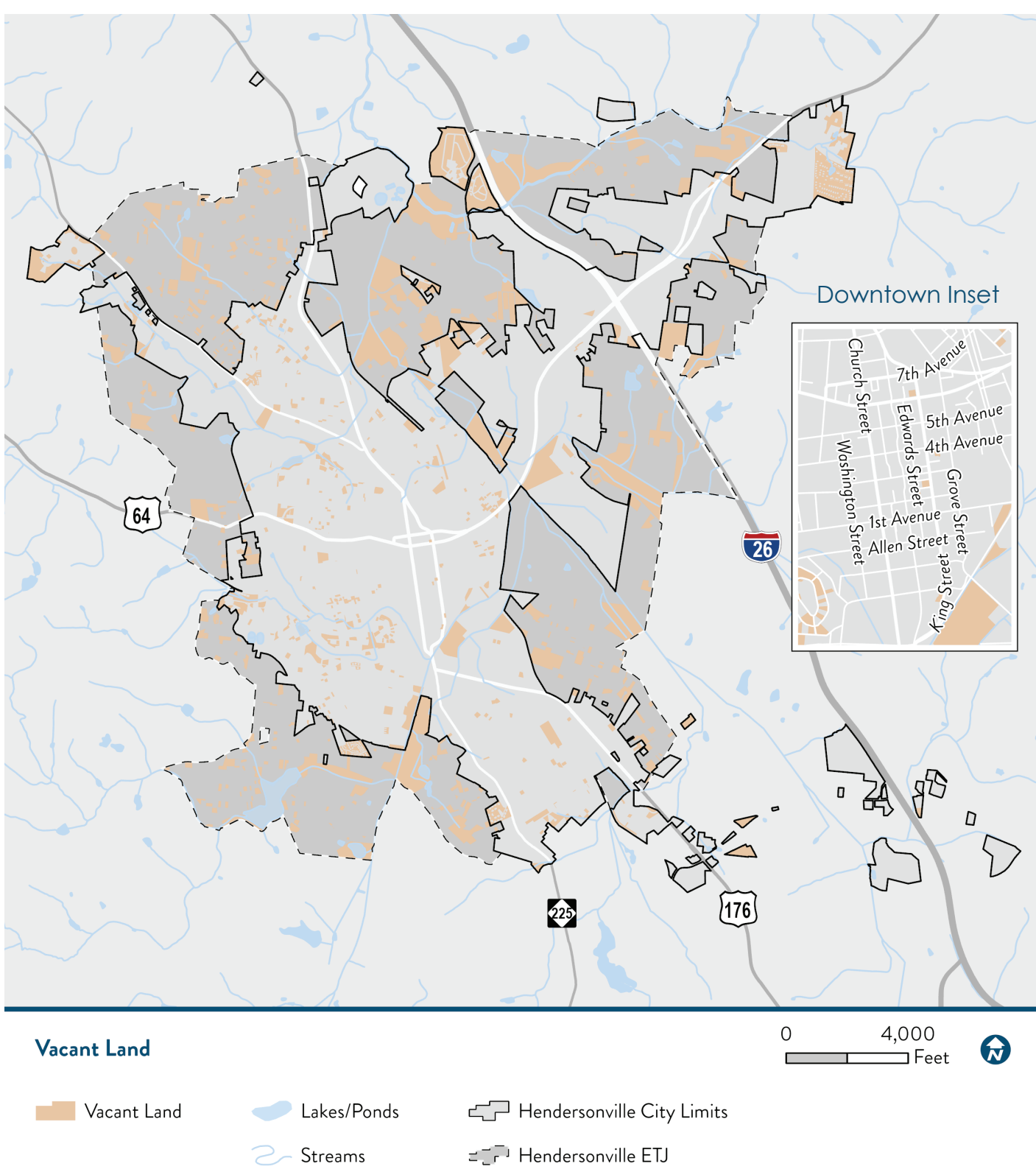
# GROWTH & DEVELOPMENT



## Development Constraints

- The Development Constraints Map shows areas that are developable and areas that are less than desirable for development due to constraining factors such as steep slopes, environmentally sensitive areas, and flood zones areas.
- 41.7% of overall land currently impervious, 17.6% of overall land currently vacant, and 0.55% of overall land currently zoned agricultural.

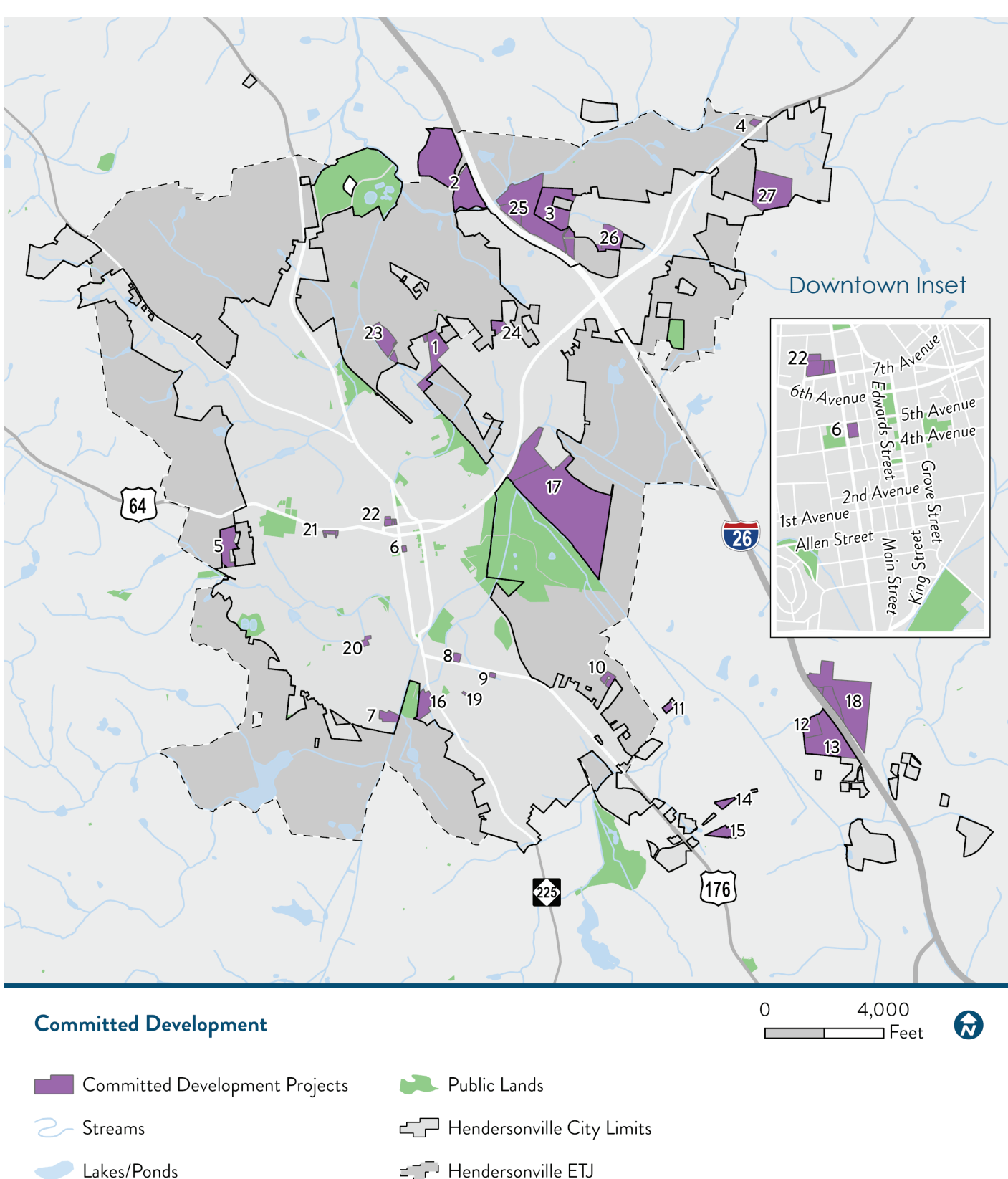
Share your thoughts...



## Vacant Land

- Hendersonville currently contains approximately 600 acres of vacant land, which is about 14% of the city's land area. Within the ETJ, vacant land accounts for nearly 860 acres (20) of overall ETJ.
- Vacant land is scattered throughout the city and ETJ on parcels of varying sizes, but concentrations are found within the ETJ to the north-central, east, and south.
- Downtown contains several smaller vacant parcels.

Share your thoughts...



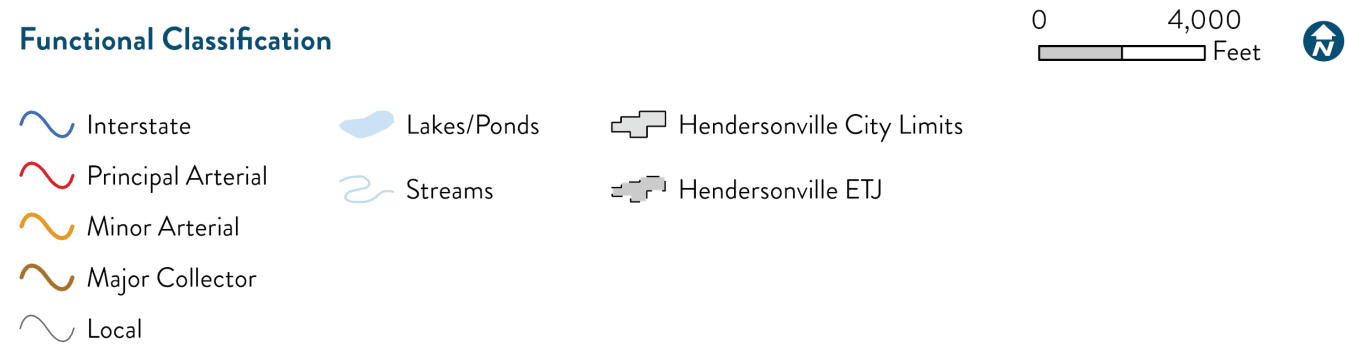
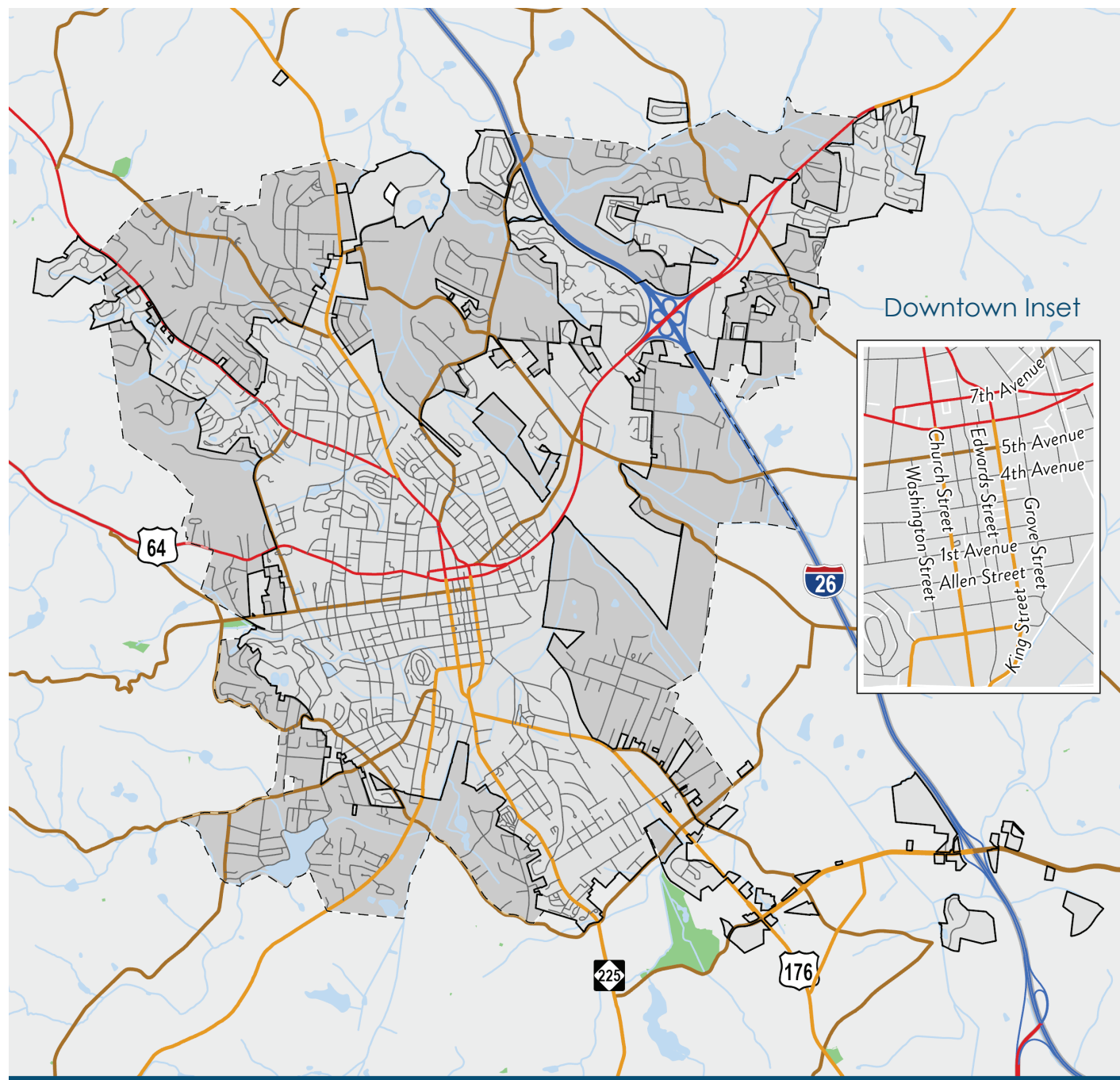
## Committed Development

- Hendersonville has nearly 30 sites with committed development that cover more than 575 acres in total.
- The developments are a mix of nonresidential, single family residential, and multi-family residential and total about than 2,750 residential units. multi-family units across 161.9 acres.
- A committed development list can be found in the Existing Conditions report.

Share your thoughts...



# MOBILITY



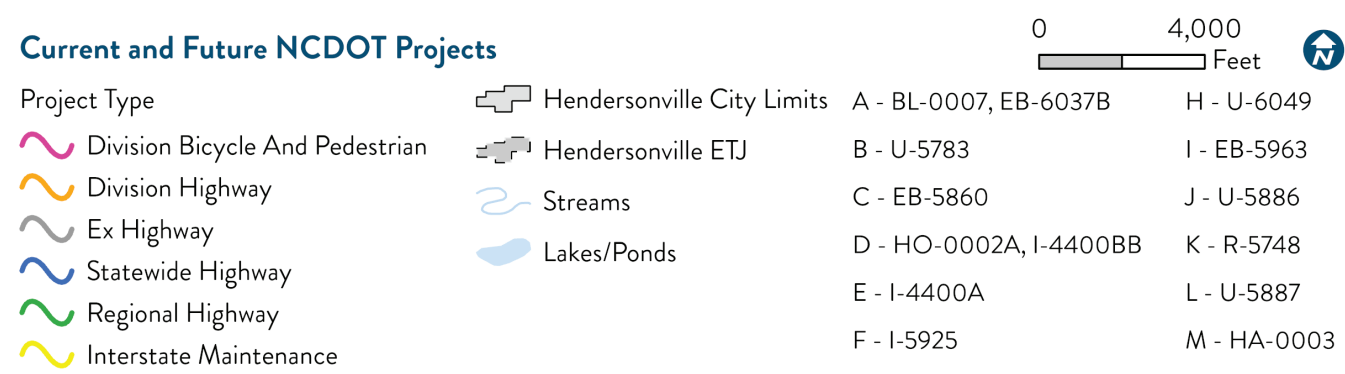
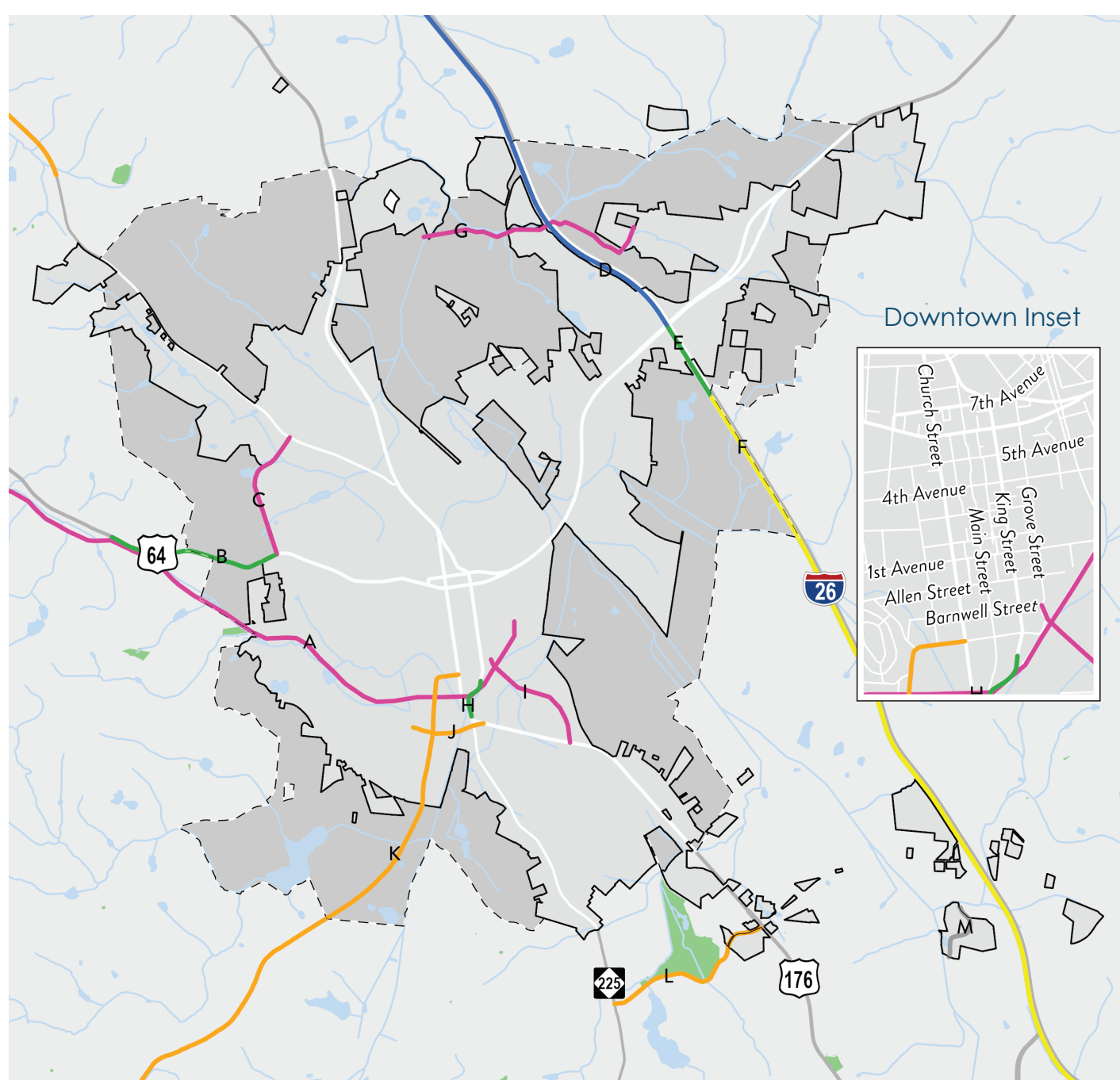
## Functional Classification

- The North Carolina Department of Transportation (NCDOT) categorizes roadways into different **functional classifications** to articulate each road's role in the broader network and to help identify different design standards for different types of road.

Learn more by scanning the QR code



Share your thoughts...



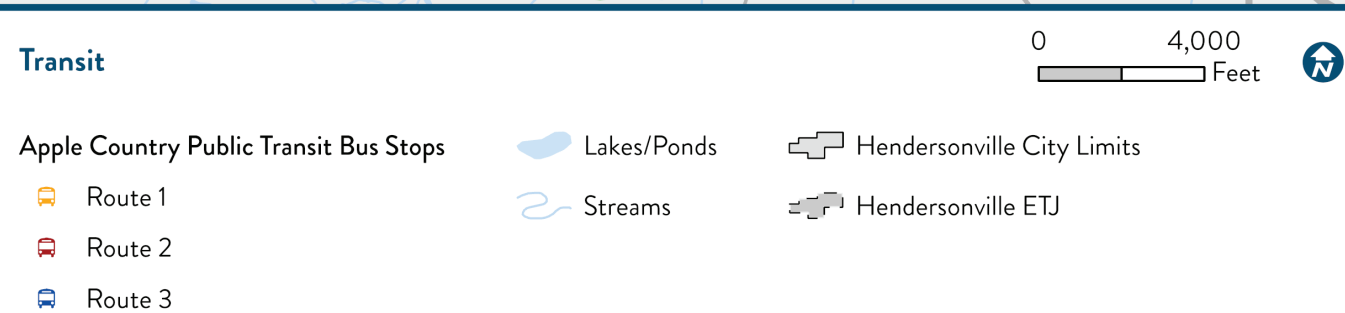
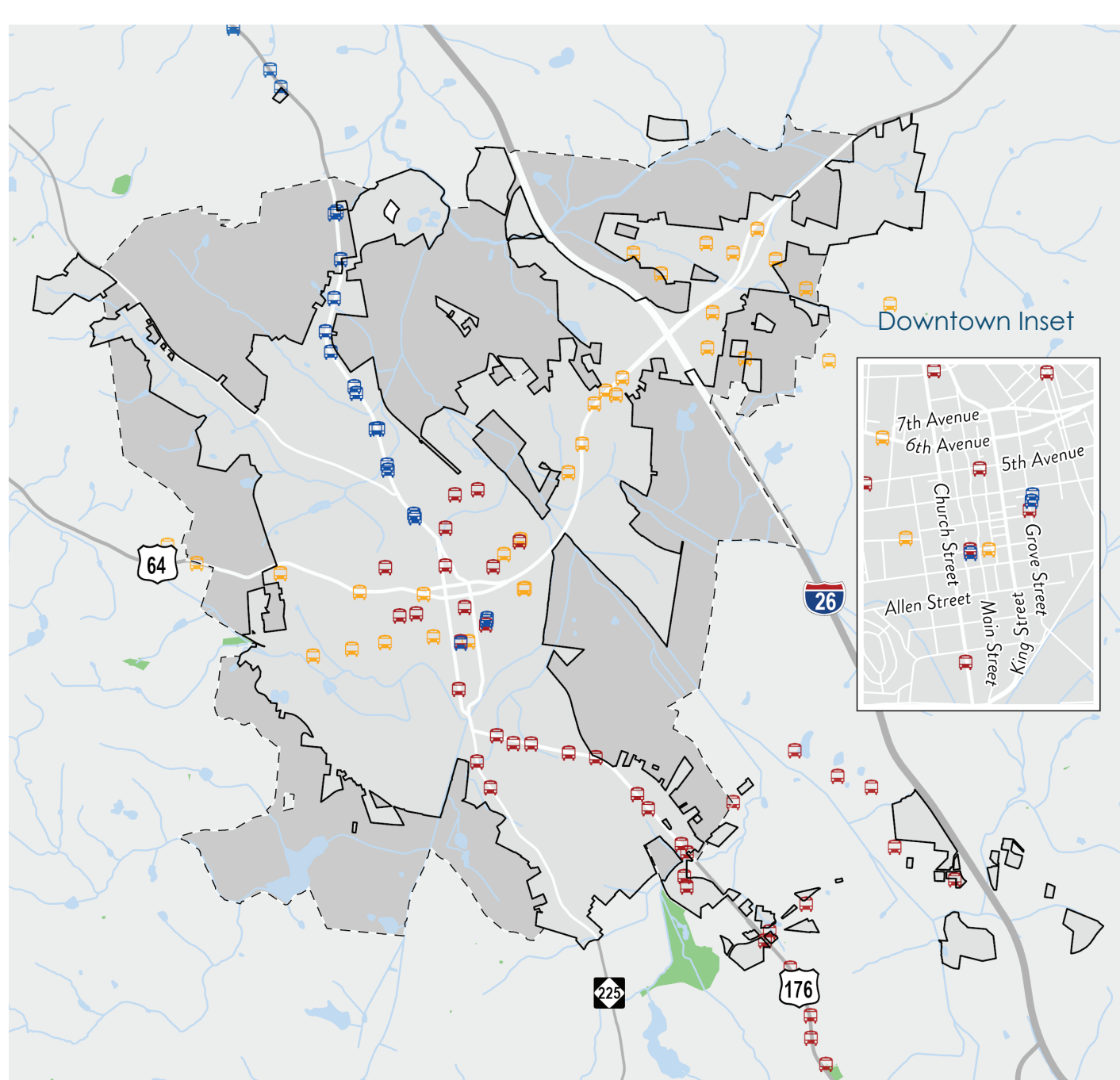
## NCDOT Projects

- The North Carolina Department of Transportation (NCDOT) has multiple bike, pedestrian, and roadway projects under construction or beginning construction in the coming years. To view the **interactive project map**, use the QR code below.

Learn more by scanning the QR code



Share your thoughts...



## Transit

- Apple Country Public Transit (ACPT) provides bus service throughout the City of Hendersonville with three bus routes running from 6:30 a.m. - 6:30 p.m., Monday through Friday.
- Henderson County is currently developing a **Transit Feasibility Study**.

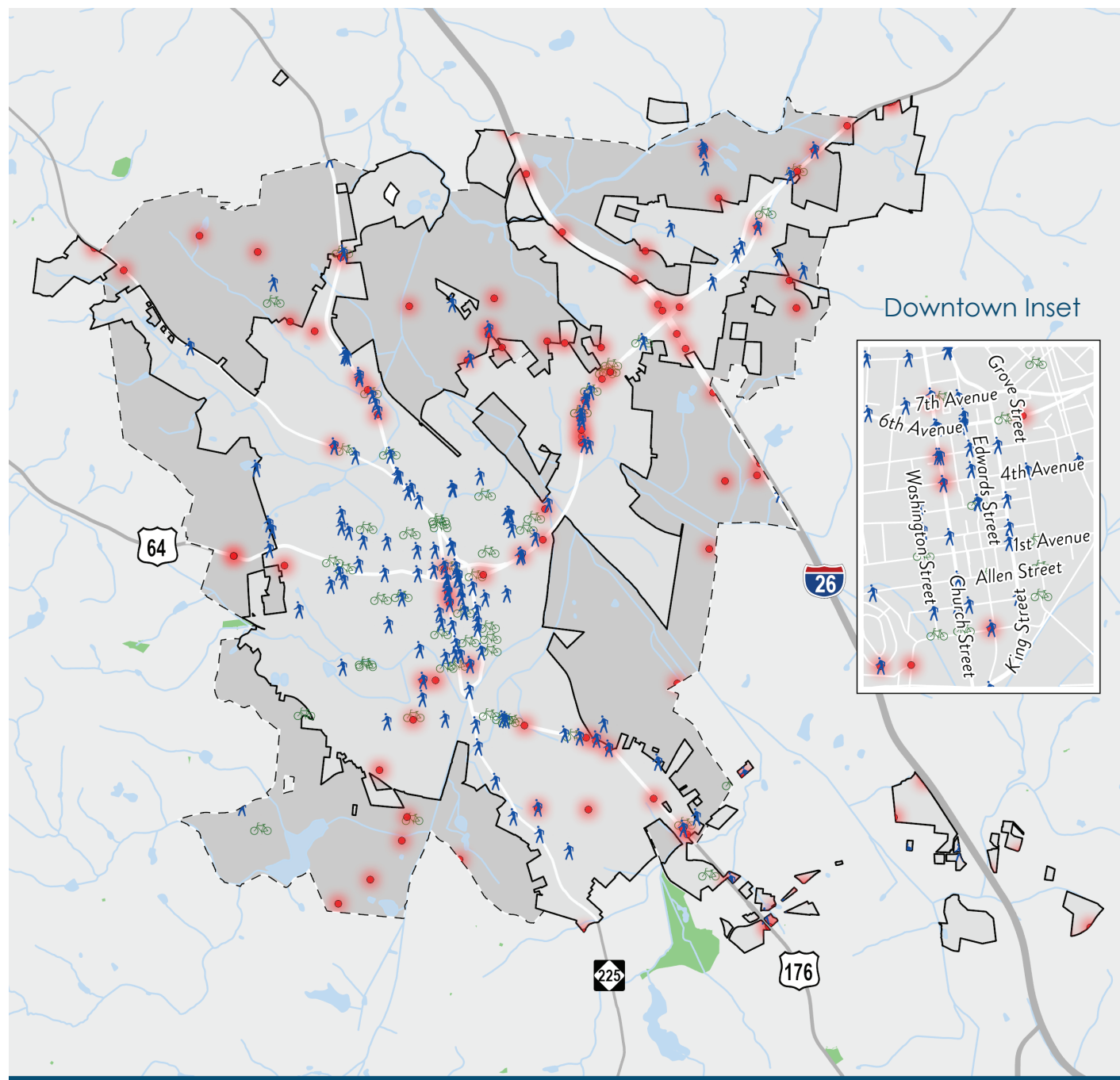
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# MOBILITY



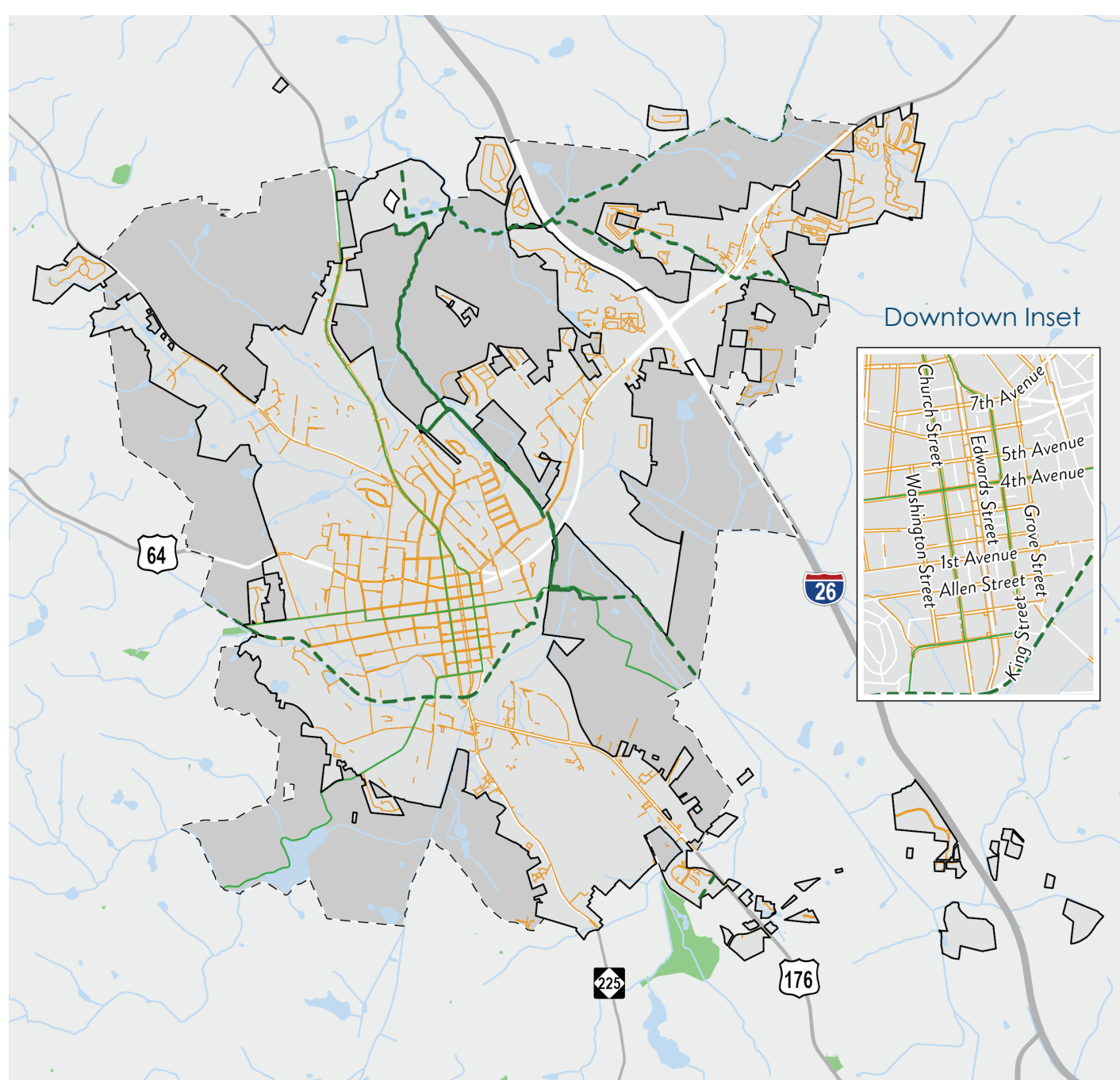
**Crash History**

- Pedestrian Crashes (2007-2021)
- Fatal and Serious Injury Crashes (2012-2021)
- Bicycle Crashes (2007-2021)
- Hendersonville City Limits
- Hendersonville ETJ
- Lakes/Ponds
- Streams

## Crash History

- From 2018 through 2022, NCDOT reported that approximately 4,500 crashes took place in Hendersonville, including 18 fatal or serious injury crashes.
- Of the 86 municipalities with over 10,000 people in North Carolina, Hendersonville had the 27th most crashes in 2019 despite being the 71st most populous.

Share your thoughts...



**Bicycle and Pedestrian Infrastructure**

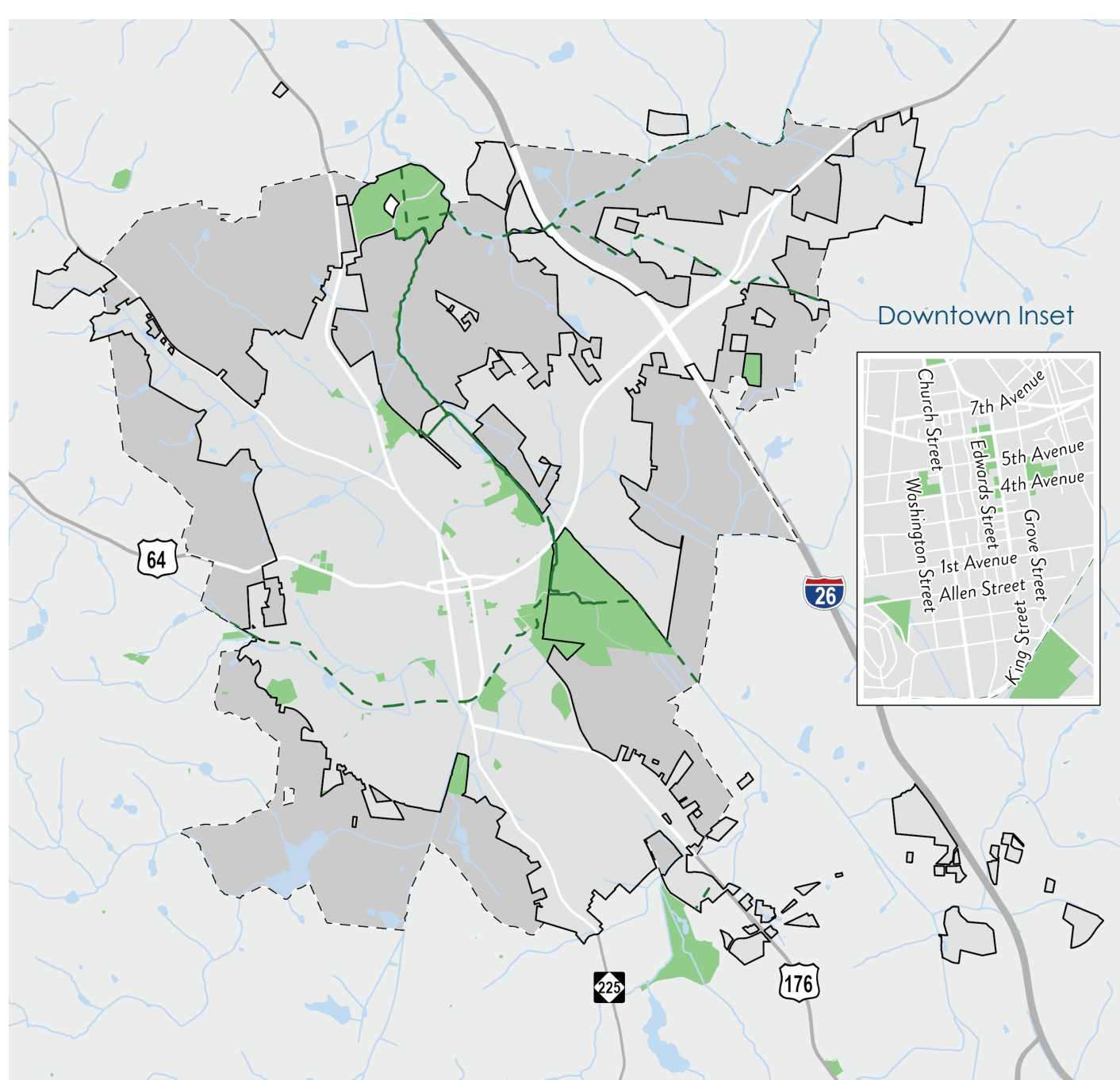
- Sidewalks
- Bike Routes
- Existing Greenways and Trails
- Proposed Greenways and Trails
- Lakes/Ponds
- Streams
- Hendersonville City Limits
- Hendersonville ETJ

## Bike & Ped Infrastructure

- Based on the public survey, the expansion of streets with sidewalks (67%) and the expansion of bikeways and bike lanes (67%) were tied for the highest ranked priority to make Hendersonville more walkable and bikeable.
- The City recently completed the draft **Walk Hendo Plan**.

Share your thoughts...

Learn more about the plan by scanning the QR code



**Parks and Green Space**

- Parks
- Existing Greenways
- Proposed Greenways
- Lakes/Ponds
- Streams
- Hendersonville City Limits
- Hendersonville ETJ

## Greenways & Trails

- Based on the public survey, many respondents desire more greenways and trails for all ages and abilities.
- Connecting parks and places via trails and greenways is a community priority.
- The **Ecusta Trail** is a highly anticipated amenity that will connect people to downtown and beyond.

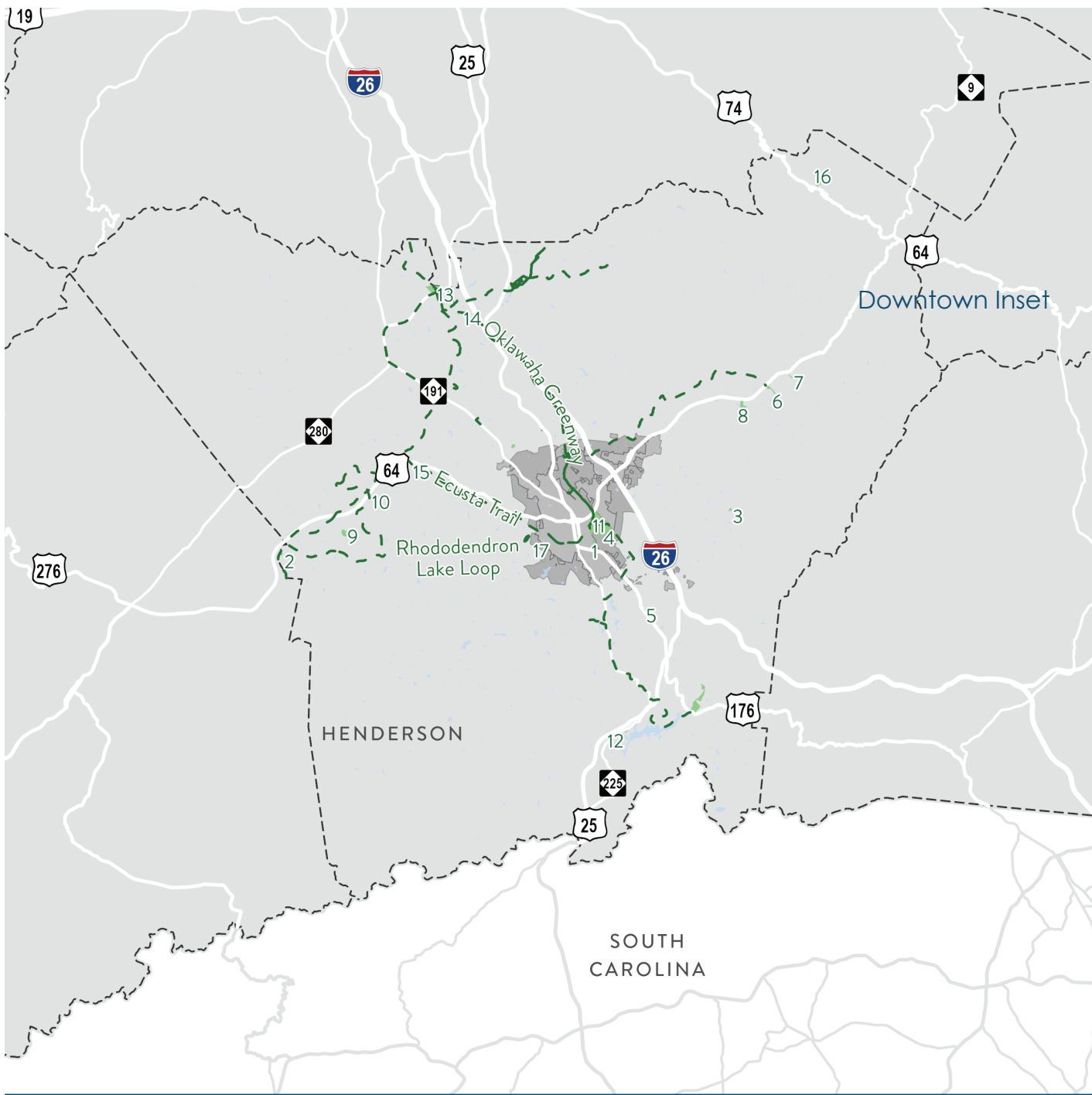
Share your thoughts...

Learn more about the **Ecusta Trail** by scanning the QR code





# OPEN SPACE & CONSERVATION



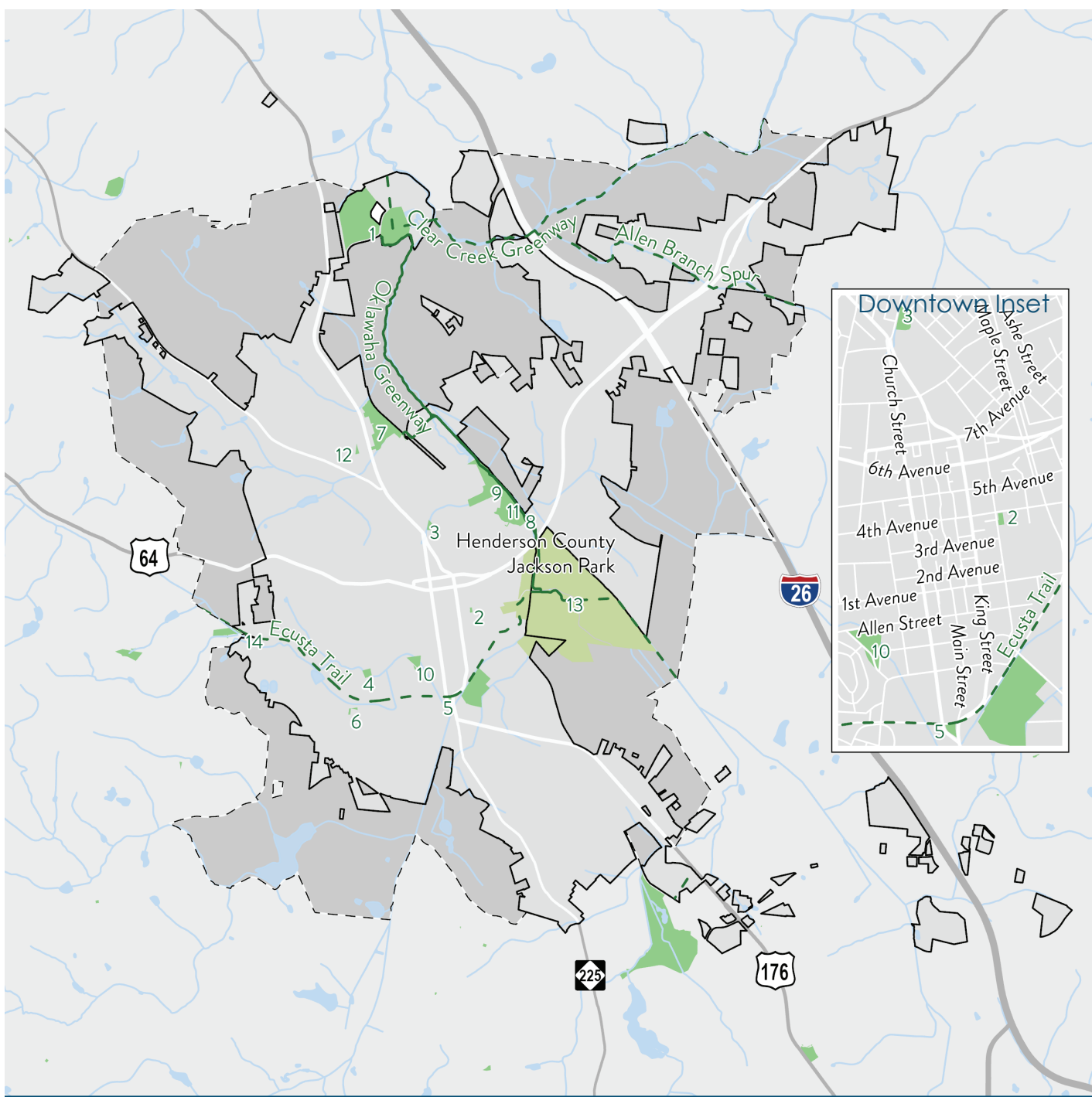
**Henderson County Parks**

- Henderson County Owned Parks
- Existing Greenways and Trails
- Proposed Greenways and Trails
- Lakes/Ponds
- Hendersonville City Limits
- Hendersonville ETJ
- Counties

## Henderson County Parks & Greenways

- Henderson County's Parks and Recreation Department oversees the programming, maintenance, rental of facilities, safety, and usage of twelve parks in Henderson County.
- Based on the public survey, the highest ranked projects respondents felt most important to implement in the next 20-40 years were parks that protect environmental health and natural resources (75%).

Share your thoughts...



**City of Hendersonville Parks**

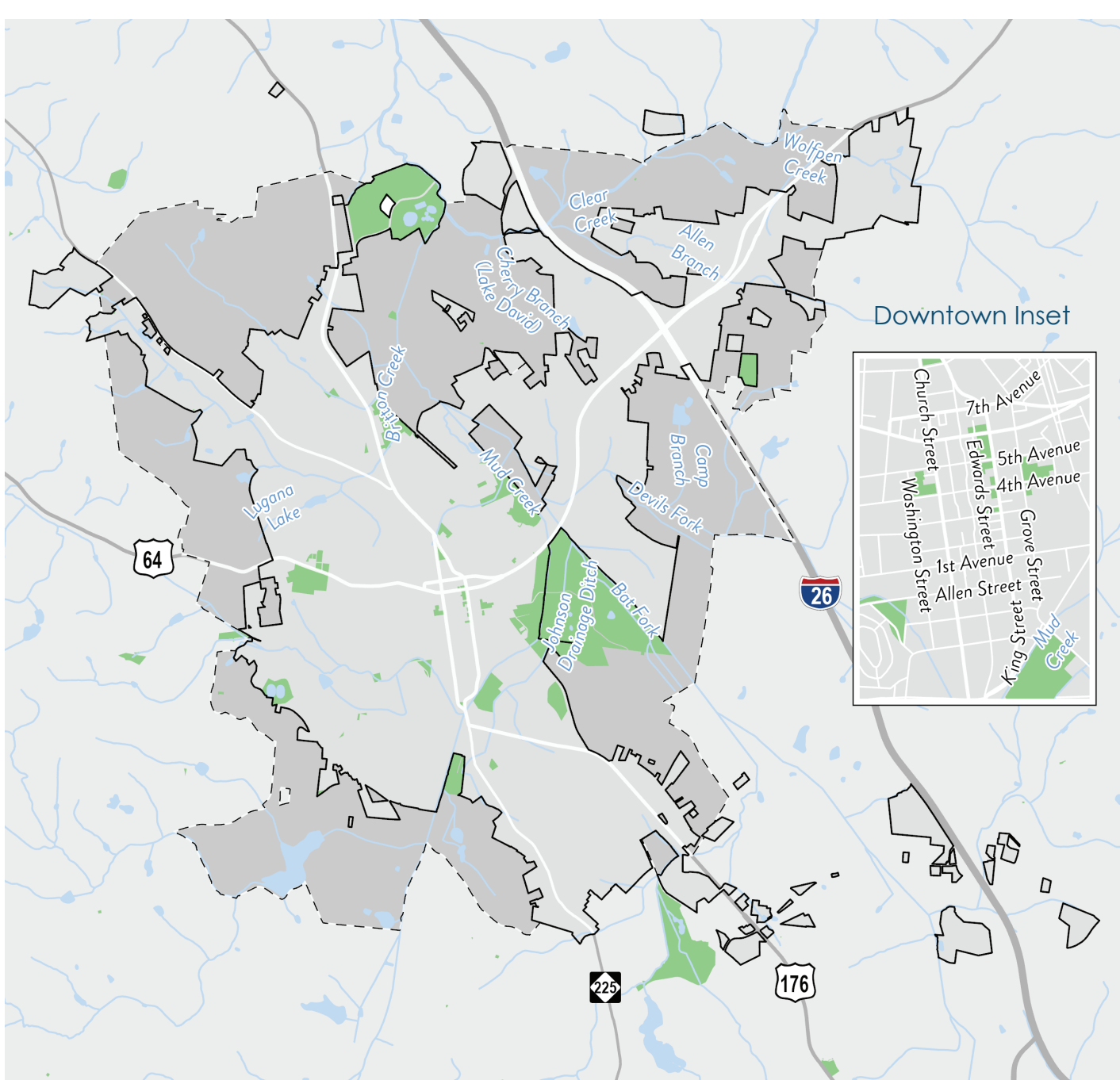
- City of Hendersonville Owned Parks
- Henderson County Owned Parks
- Existing Greenways and Trails
- Proposed Greenways and Trails
- Lakes/Ponds
- Streams
- Hendersonville City Limits
- Hendersonville ETJ

## Hendersonville Parks

- City of Hendersonville's Public Works Department maintains public parks and greenways within the city.
- Concurrent with the Gen H Comprehensive Plan, the City is updating their plan for the future of city future parks, greenways, and green spaces.

Share your thoughts...

Learn more about the plan by scanning the QR code



**Water Bodies and Public Lands**

- Lakes and Ponds
- Streams
- Public Lands
- Hendersonville City Limits
- Hendersonville ETJ

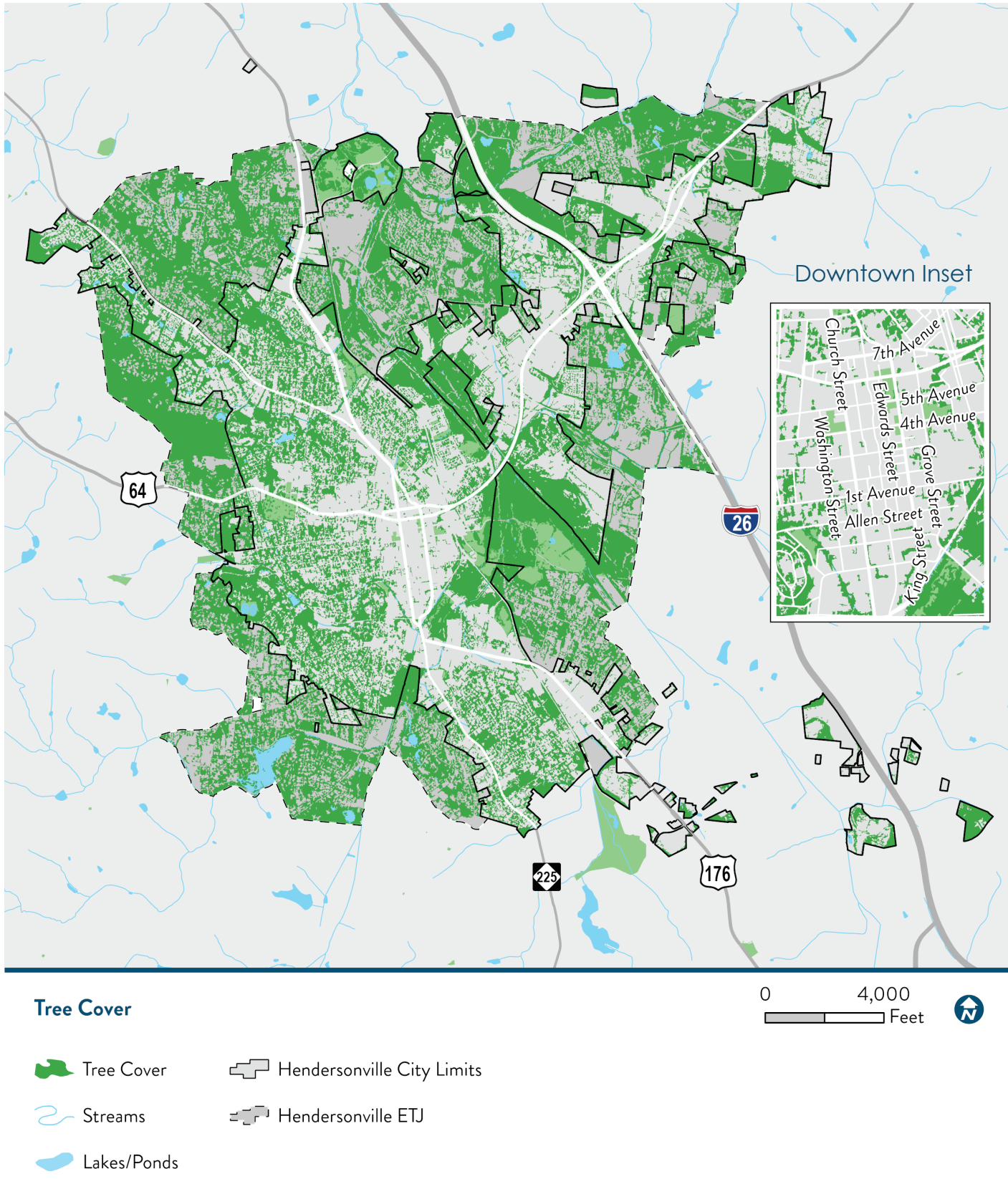
## Water Bodies & Public Lands

- Based on the public survey, the majority of participants ranked land management to be the most important area of sustainability (82%) with water being ranked second highest at 72%.

Share your thoughts...



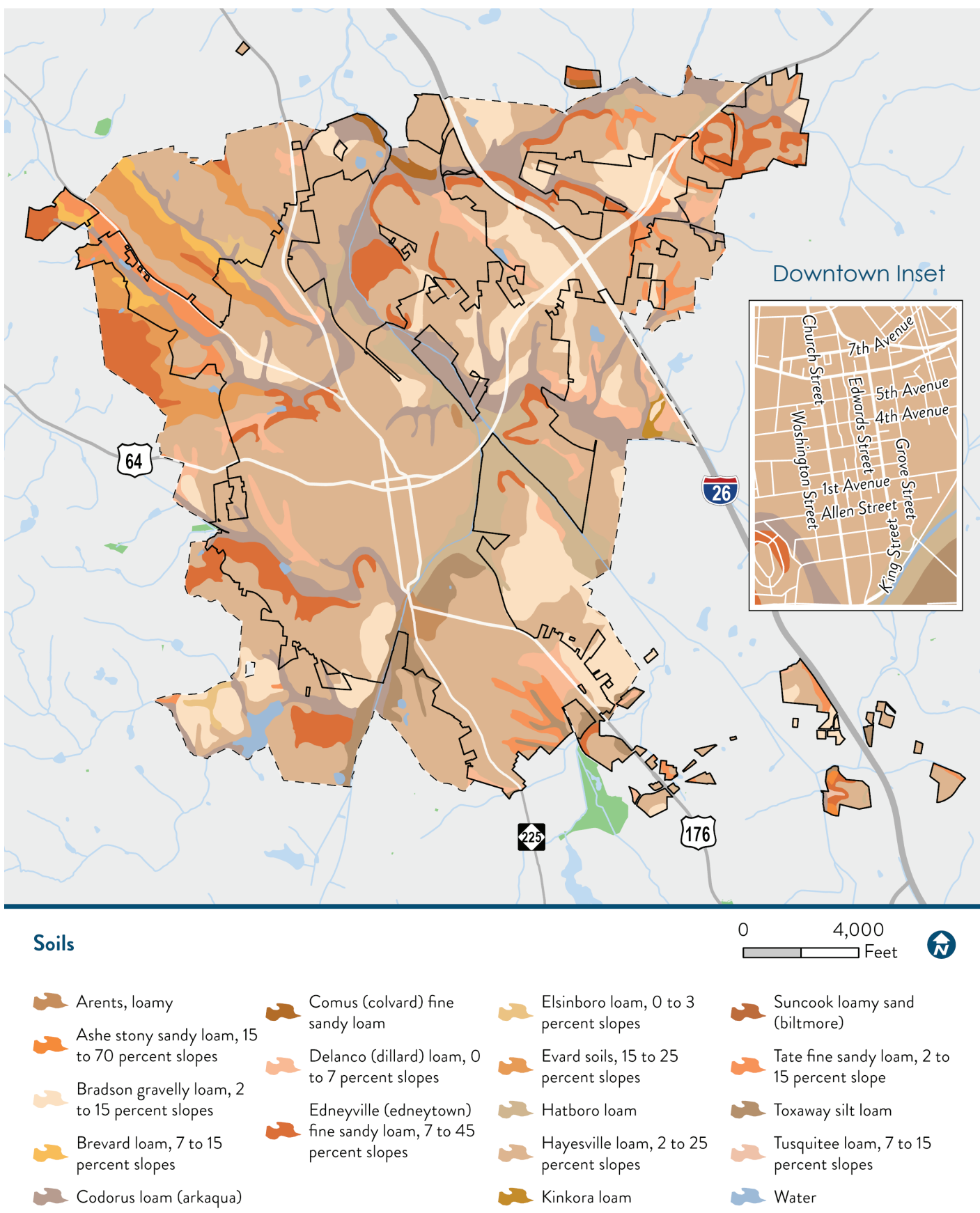
# OPEN SPACE & CONSERVATION



## Tree Cover

- The City of Hendersonville conducted a Tree Canopy Study in 2023 and the initial findings are that the city has experienced a -2% tree canopy loss since 2009.
- Henderson County also performed an assessment on tree cover revealing that there is approximately 4,343 acres of tree cover, accounting for 50.68% of the total land area in the city of Hendersonville's ETJ.

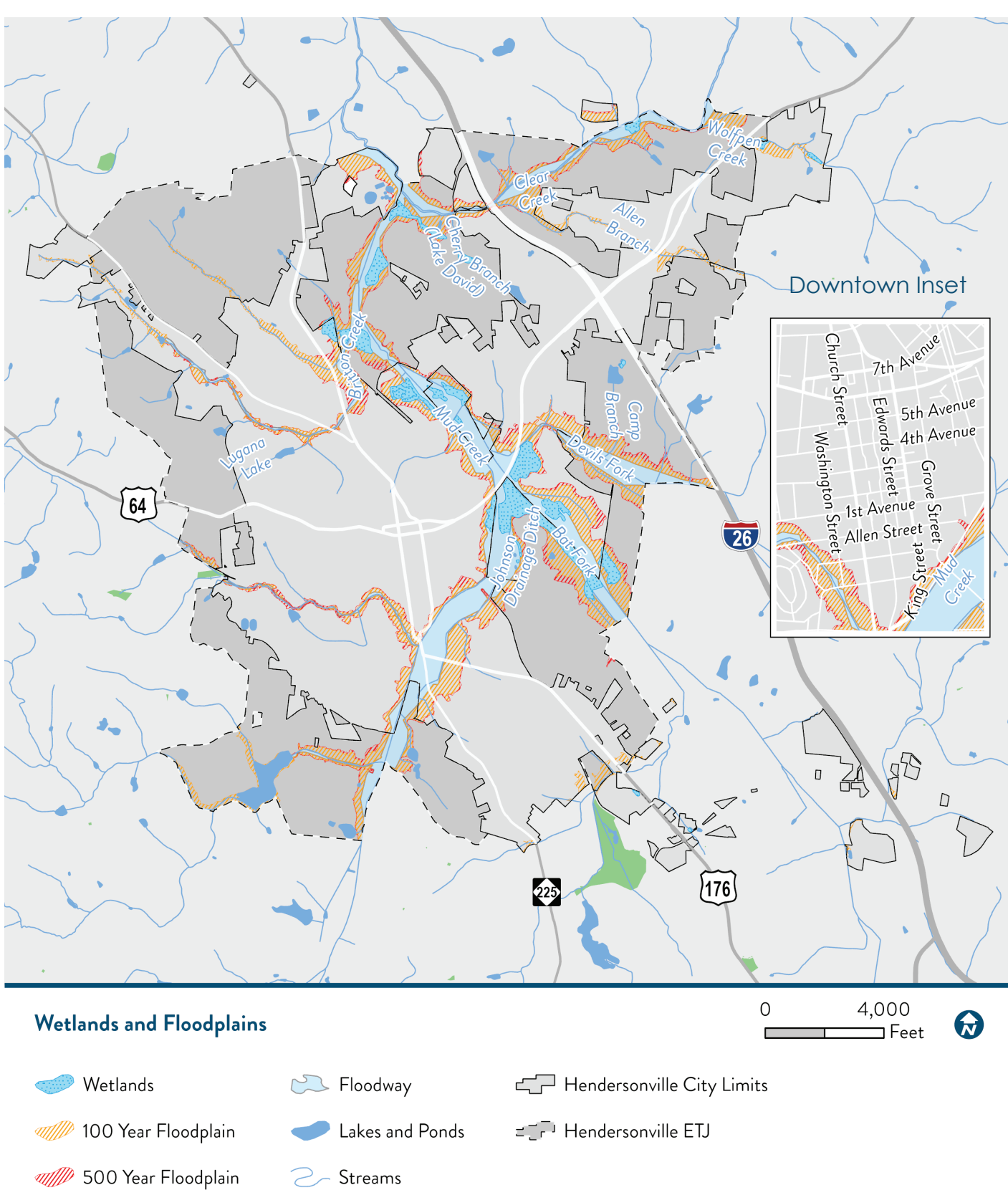
Share your thoughts...



## Soils

- Hendersonville is situated in the Inner Piedmont Belt, a geological region characterized by metamorphosed igneous and sedimentary rocks.
- In Hendersonville, the primary soil types are under a Hayesville-Bradson association, Evar-Edneyville-Ashe association, or Codorus-Toxaway-Rosman association.

Share your thoughts...



## Wetlands & Floodplains

- There are two main types of wetlands observed in and around Hendersonville: Freshwater Forested/Shrub Wetland and Freshwater Estuary Wetland.
- Based on the survey, many respondents would like to see more environmental restoration in Hendersonville.

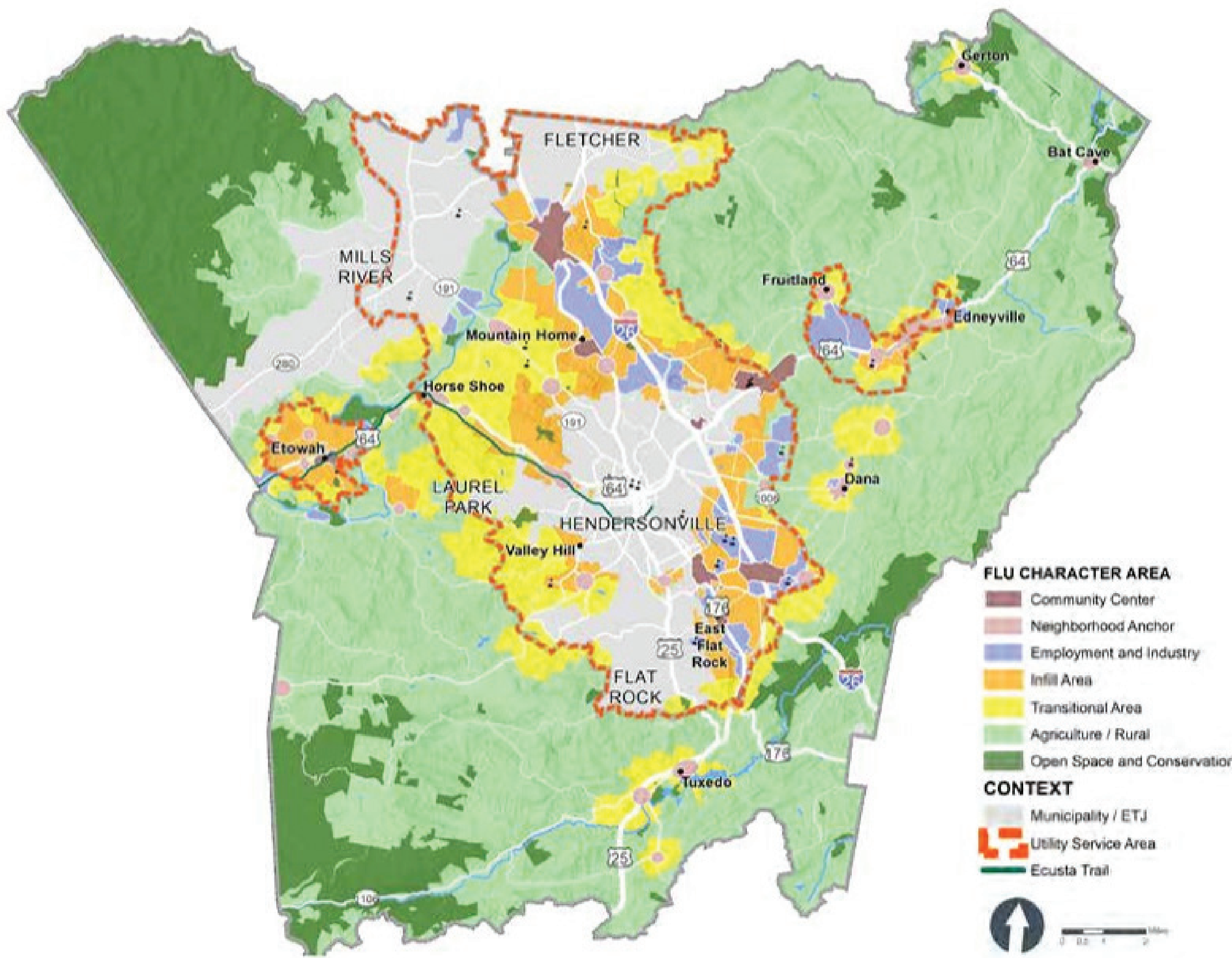
Share your thoughts...



# POLICY REVIEW

## Adopted Plans & Policy Analysis

A review of Hendersonville's adopted plans and ordinances provides important insight into its existing policy and regulatory framework for addressing the challenges and opportunities that the City faces as a growing mountain community at the southern edge of the Blue Ridge Mountains. This discussion will help to inform recommendations on how the City can implement the updated community vision that will be crafted as part of the 2045 Comprehensive Plan. As a result, this scan is a valuable component of the Data, Inventory, & Analysis phase of the comprehensive planning process.



Henderson County's draft 2045 Comprehensive Plan highlights some opportunities for collaboration on land use and utility issues.

## Plans & Policy

- Promote safe places to walk and bike
- Increase supply of affordable housing
- Make community more age-friendly
- Catalyze commercial and mixed-use redevelopment
- Plans mostly consistent along border with Laurel Park and Flat Rock
- Opportunities for coordination with Henderson County

## Ordinances

- Opportunities to improve structure and formatting of development ordinances
- Consider strengthening parkland dedication requirement
- Possibility of developing form-base code for downtown and activity centers

## Investments

- Have good system for ranking capital projects
- Check level of investment in Information Technology projects
- Consider creating Plan Implementation Fund to help with project delivery
- Look for opportunities to achieve multiple objectives with public investments
- Continue looking for opportunities to leverage local investment with state and federal funds

### § 6.6 GATEWAY CONDITIONAL ZONING DISTRICTS.

#### 6.6.1 Gateway Conditional Zoning District Standards.

In addition to the five Base Zoning Districts detailed in Section 6.5, the Butner Gateway also includes three Conditional Zoning Districts. These exist as floating zones as shown on the Butner Zoning Map, and can be applied to individual properties in the designated areas through approval of a conditional zoning following the procedures for a conditional zoning detailed in Section 6.3 and applying the applicable standards for each district detailed in this section.

(A) BUTNER COVE GATEWAY (BCG) DISTRICT			
<b>1. Purpose</b>			
		To encourage walkable, mixed-use development at the southern entrance to Butner that creates a high-quality gateway into the community, with commercial and higher density residential uses and activities that serve local and regional residents, workers, visitors, and the traveling public.	
<b>2. Density, Form, and Uses</b>			
		Single-Family Attached Dwellings (townhomes)	Multi-Family Dwellings (condos, apartments)
Net Density (d.u./acre)	Min. 8 Max. 12	19	N/A
Min. Height'	Feet N/A	2	2
Max. Height'	Feet 4	5/20'	6/20'
Allowable Frontage Types <sup>3</sup>	Feet 48	72/240'	75/24'
Mix of Uses	Required (residential, commercial, and at least one of the following: office, institutional)		
Allowable Uses	See Table of Permitted Uses		
<b>3. Site Design</b>			
Min. Lot Area (square feet)	3,500	10,000	2,000
Min. Lot Width (feet)	20	50	20
Build-to Line (feet)	Min. 10 Max. 20	0	0
Min. Build-to Zone Street Frontage Occupied by Buildings (%)	80 <sup>4</sup>	80 <sup>4</sup>	80 <sup>4</sup>
Min. Front Setback (feet)	N/A (see Min. Build-to Line above)		
Min. Side Setback (feet)	10 <sup>5</sup>	0	0
Min. Corner Side Setback (feet)	10 <sup>5</sup>	0	0
Min. Rear Setback (feet)	6	N/A	N/A
Min. Side Setback (feet)	0	0	0
Off-street Parking Types	Surface lot, parking deck, underground parking		
Off-street Parking Locations	To the side, behind, above, below		
Off-street Parking Ratio	See Section 6.6.1(D)(7)		
<b>4. Streets and Blocks<sup>2</sup></b>			
Street Types – Internal Streets <sup>2</sup>	Main Street: Avenue		
Street Types – Adjacent Arterials <sup>2</sup>	Parkway with Median, or as determined by Planning Director in consultation with NC Department of Transportation		
Pedestrian Facilities	Both sides of every street; safe crossings; connected network within and between projects		
Bicycle Facilities	Sharrows on local streets; Bike lanes on every collector; Multi-use paths on every arterial; Bicycle parking <sup>7</sup>		
Streets	Transportation Impact Analysis <sup>6</sup> ; Right-of-Way dedication; street connectivity <sup>7</sup>		

The Hendersonville development ordinances could benefit from the use of a form-based code in key locations.

### Capital Improvement Prioritization

FY24

The City of Hendersonville maintains a Capital Improvement Plan (CIP) to track and plan for future-year projects. The CIP is amended and adopted on an annual basis, with each fiscal year's budget process. The adopted CIP spans 10 years from date of adoption.

The City's CIP utilizes a two-dimension rating system where two types of priorities are established, the categories for each are ranked and assigned a numeric score, and the scores for the categories from one dimension are multiplied by the scores for the categories from the other dimension to produce a matrix of ratings. The two dimensions used in the City's matrix are (1) the degree of urgency and (2) the priority of the function, each with subsets ranked from high to low. A low rating on this matrix would equate to a high priority project for the City, and a high rating would equate to a low priority project. The image below is an excerpt from the City's CIP illustrating the City's rating system. As priorities change over time, the corresponding priority ranking for respective projects are re-evaluated each fiscal year.

City of Hendersonville Two-Dimension Rating Matrix							
Degree of Urgency	Priority of Function						
	1	2	3	4	5	6	7
	Protection	Environmental Health	General Government	Maintenance	Community Development	Recreation	History/Culture
1 Legislation	1	2	3	4	5	6	7
2 Hazard	2	4	6	8	10	12	14
3 Efficiency	3	6	9	12	15	18	21
4 Economic Advantage	4	8	12	16	20	24	28
5 Expand Service	5	10	15	20	25	30	35
6 New Program or Convenience	6	12	18	24	30	36	42

The ratings for each category are detailed in the CIP as follows:

#### Degrees of Urgency:

1. Legislation: Required by legislation or regulation of federal or state government.
2. Hazard: Removes an obvious or potential hazard to public health or safety.
3. Efficiency: Replaces equipment or a facility that is obsolete, or would be too costly to repair, or maintains and better utilizes existing equipment and facilities.
4. Economic Advantage: Directly benefits the City's economic base by increasing property values or other revenue potential.
5. Expand Service: Expands or increases a service or improves a standard of service.
6. New Program or Convenience: Makes possible a new service or increases convenience or comfort.

#### Priority of Function:

1. Protection of persons and property: police, fire, rescue, inspections, etc.
2. Environmental Health: water, sewer, sanitation, public health, etc.
3. General Government: office facilities, central services, etc.
4. Maintenance: general maintenance of City owned property.
5. Community Development: public housing, rehabilitation, etc.
6. Recreation: Parks, athletic programs, etc.
7. Heritage/Culture: education, libraries, historic districts, etc.

Hendersonville has a thoughtful process for prioritizing capital projects. Techniques used in other communities could help it accelerate project delivery.

## Opportunities

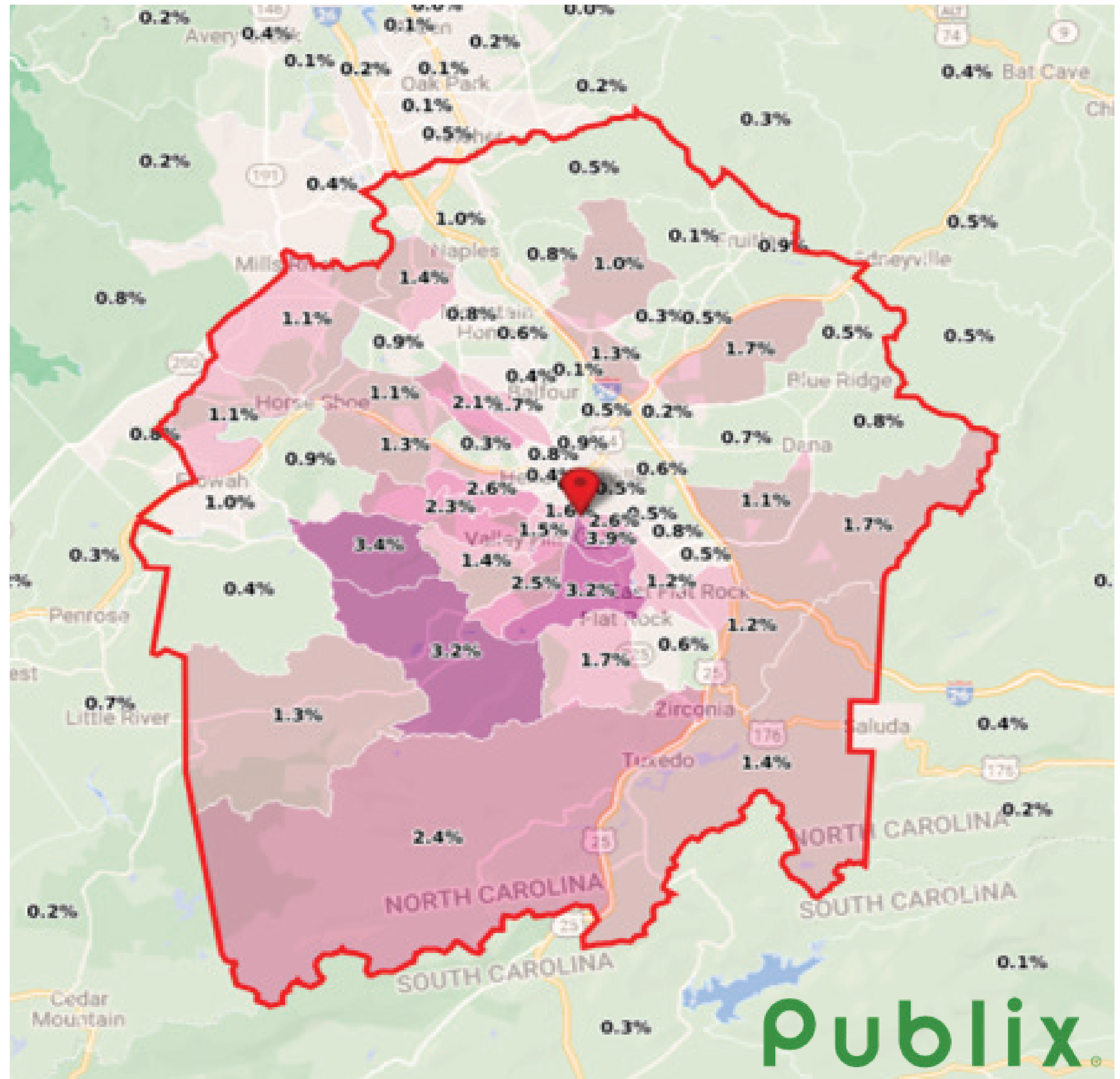
- Chance to develop stronger cross-jurisdictional opportunities
- Embrace differences
- Manage emerging issues
- Prepare for build-out



# MARKET ANALYSIS

## Mobile Data Collections

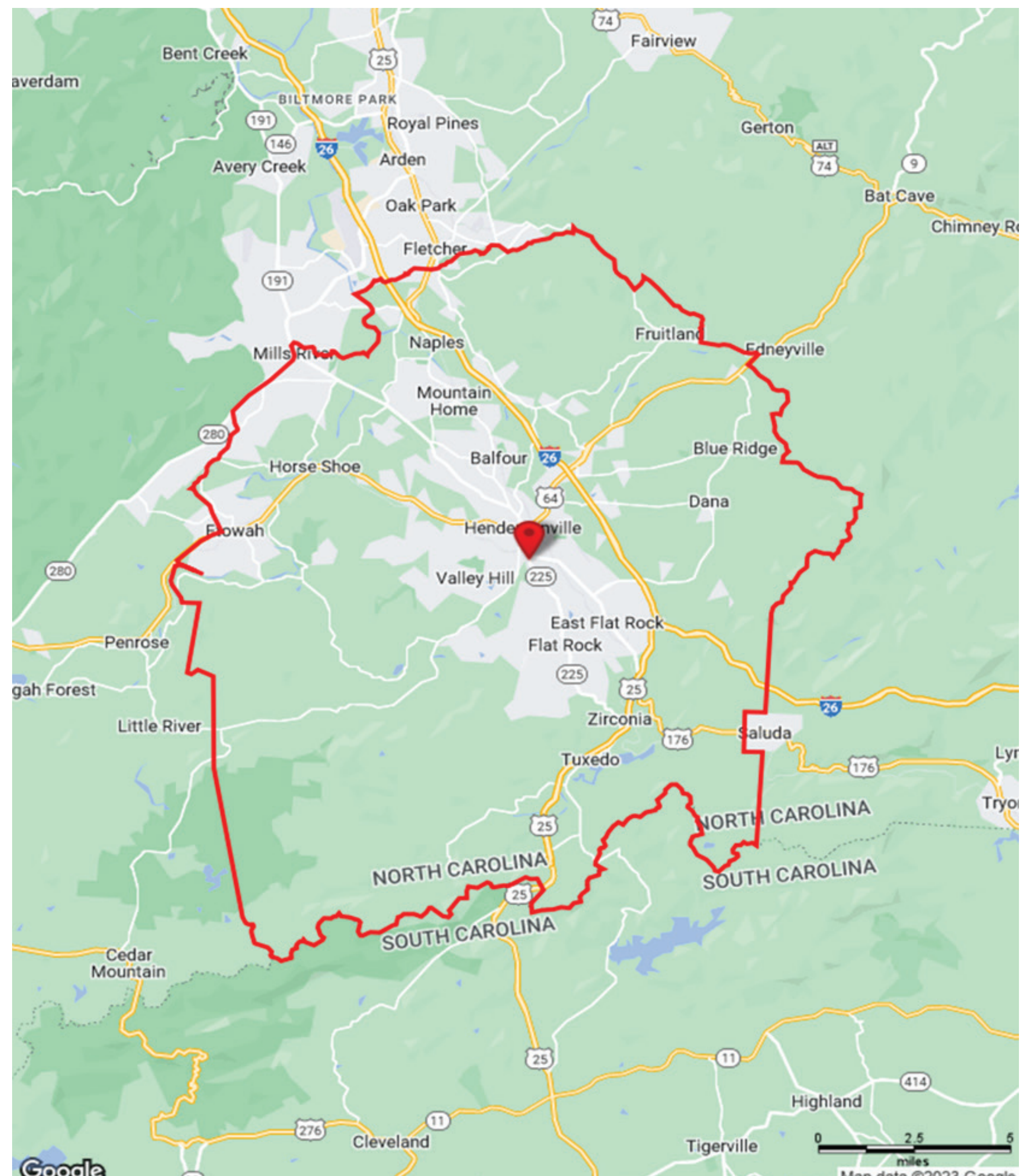
- Mobile data tracking uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information.
- The data shown includes shoppers who visited the defined location during a 1-year time period.
- This tool allows identification of where consumers are actually coming from to shop in Hendersonville's market (Custom Trade Area) using actual data.
- The location tracked was Publix, for the time period of August 2022 - August 2023.



Location Name	Publix	Estimated Annual Visits	96,886
Address	635 Greenville Hwy	Repeat Visitors	43%
City, State	Hendersonville, NC	Tourist Visits	8.6%
Category	Grocery	Average Distance From Home	4.91 mi
Brand	Publix	Average Dwell Time	22 min

## Custom Trade Area (CTA)

- A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month.
- Hendersonville's trade area has been created by combining a series of drive times, mobile data analysis, geographic boundaries, and proximity to neighboring shopping destinations.





# MARKET ANALYSIS

## Methodology

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census. The source for the establishment is Bureau of Labor Statistics (BLS). The consumer demand data by establishment is derived from the BLS Consumer Expenditure Survey (CE).

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

## Retail Gap Analysis

- The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.
- The market supply data is derived from annual retail sales and expenditures from the source data.
- The source for market supply is U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census.
- The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography.
- When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that merchandise line; for example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

## Custom Trade Area GAP Analysis

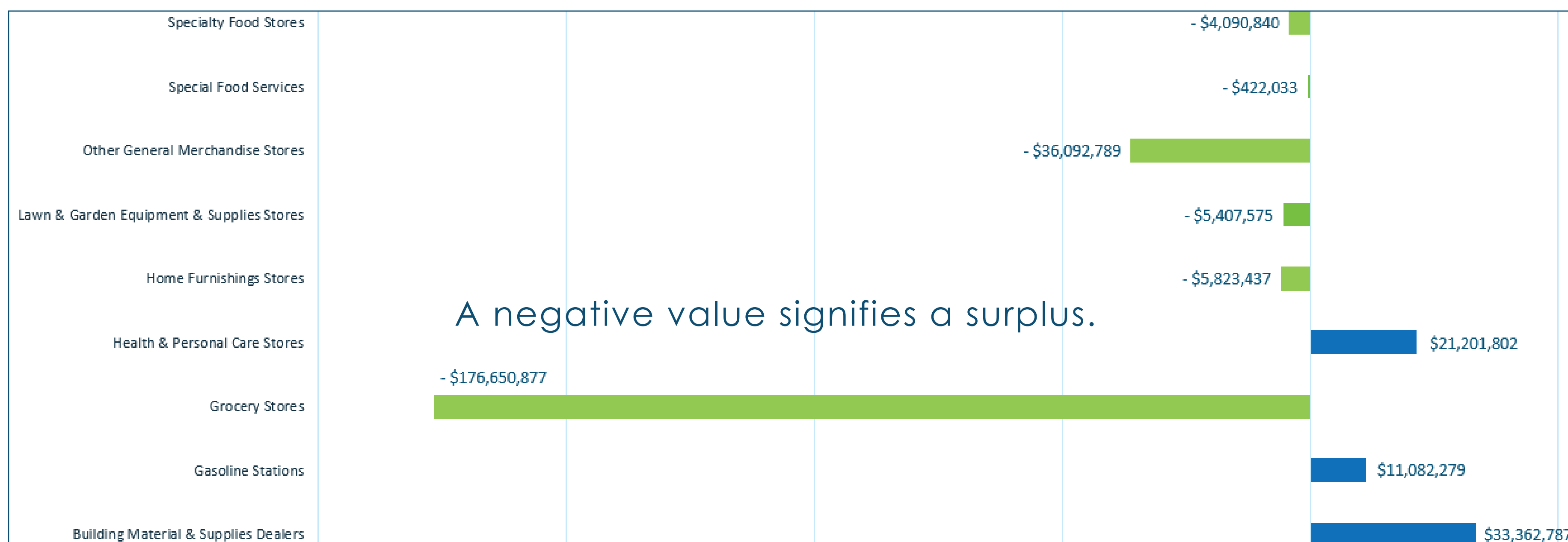


Figure 1 shows a surplus in grocery stores, among others, within the Custom Trade Area.

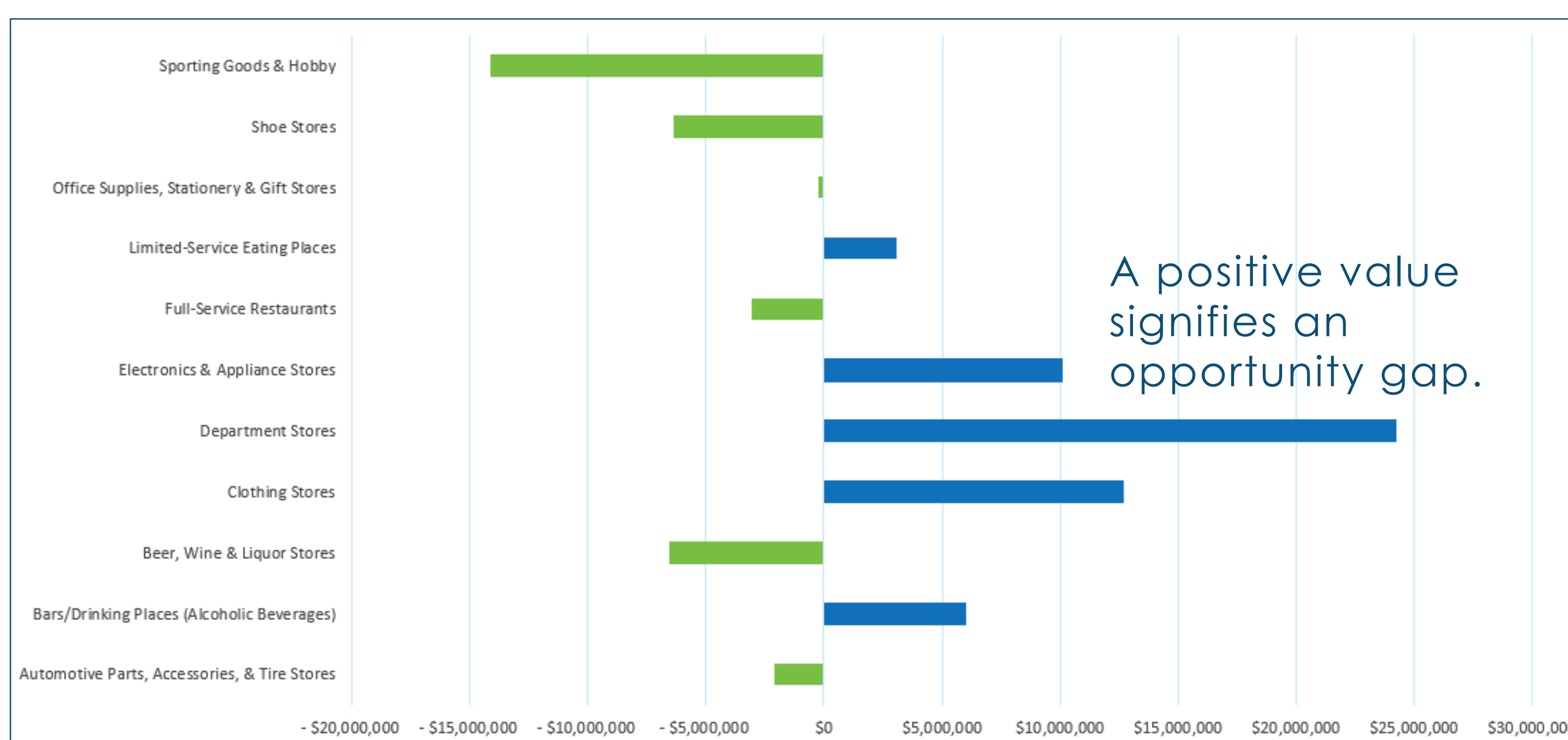


Figure 2 shows a gap in department stores, among others, within the Custom Trade Area.