Middle Tennessee continues to see dramatic population growth, reflecting a strong economy and an attractive quality of life. Our region experiences net in-migration of 70 people every day from other communities outside Middle Tennessee. As a result, our region has more people commuting to work: more than 111,405 additional commuters within the past five years. While the number of commuters using transit, walking or biking to work has increased from 18,451 in 2010 to 23,199 today, most residents still rely on cars.

Limited transportation options have contributed to an increase in travel time, making growing congestion the top concern of Middle Tennessee residents. In 2017, more Middle Tennesseans believe traffic is worse than it was just a year ago – a perception backed up by data. The average time spent commuting to and from work increased by 1.7 minutes between 2010-2015 in the Nashville MSA, adding up to an additional 3.4 hours per commuter, per year.

Despite these challenges, Middle Tennessee has made progress toward a future expansion of transit options in the region. The region's long-range transportation plan identifies nearly $8.5 billion in anticipated federal, state and local funding for transportation and transit over the next 25 years. In 2016, our transit agency approved a new strategic plan for expanding service in the region, should funding become available. Under a new state law passed in 2017, voters in six of our region’s counties can now decide on local, dedicated funding for mass transit, with Davidson County anticipated to be the first to go to the ballot in 2018.

78% of the region’s population say they experience more traffic now than one year ago, up sharply from the 62% that were asked the question in the previous year.

The average time spent commuting to and from work increased by 1.7 minutes between 2010-2015 in the Nashville MSA.

This increase adds an additional 3.4 hours per commuter per year.

Source: U.S. Census, American Community Survey, 2015

Source: Nashville Area MPO, 2017
Health in the joint metro region is highly interrelated with the area’s education and mobility options. A healthy, educated and mobile population will most fully participate in the economy and life of the region. Good health starts in our homes, schools, workplaces, neighborhoods and communities. Poor health brings a significant personal cost, but also damages the economic competitiveness of our region in many ways. As a relatively new health challenge, opioid addiction is impacting the people of our region. In 2017, 42 percent of people in our region reported knowing someone who has been personally affected by addiction to prescription painkillers, and 55 percent were concerned about someone they knew with a drug or alcohol problem.

Social determinants of health are the conditions in which Nashville and Clarksville area residents are born, live, work. We achieve and maintain health by eating well and staying active, not smoking, getting the recommended immunizations and screening tests and seeing a doctor when we are sick.

Our health is also shaped by access to social and economic opportunities, resources and supports in our homes, neighborhoods, and communities, quality of our schooling, safety of our workplaces, cleanliness of our water, food and air, and the nature of our social interactions and relationships. These factors all contribute to higher rates of diabetes, depression and obesity in Middle Tennessee as compared to our peer regions.

With a tight current labor market and an unprecedented number of workers expected to retire in the coming decade, health plays an increasingly important role in determining our economic future and resilience. Poor employee health results in significant medical and productivity costs, both from worker absences and sick employees who do not perform to their potential at work, also known as presenteeism. In our region, more than $500 million is lost annually due to absenteeism and ‘presenteeism’ associated with diabetes, obesity and hypertension in the workforce.

Employers are increasingly playing a role in helping to address this issue through innovative programs for their employees and by building a culture of health and wellness in the workplace.

55% of area residents are somewhat or very concerned about someone they know that is addicted to alcohol or drugs.

Local residents believe they are, on average, 19 pounds over their ideal body weight.
 Prosperity is increasingly tied to education and skill attainment. High school graduation rates in our region have increased steadily, with the statewide rate hitting an all-time high of 89.1 percent in 2017. But with regional projections showing that a greater percentage of jobs over the next 20 years will require an associate’s degree or higher, there is an intense focus on raising college completion rates. The Nashville region has made steady progress in increasing the percentage of adults with at least a two-year college degree, from 36.4 percent in 2010 to 40.5 percent in 2015, but we are still far short of the state’s goal of 55 percent.

Race/Ethnicity - Educational Attainment Bachelor’s Degree or Higher 2010-2015

Community colleges play a critical role in helping develop a skilled, educated workforce, and the completion rates of these institutions in Tennessee, and our region, must improve. In 2016-17, the three-year graduation rates for community colleges in our region range from 11 to 24 percent. Student retention strategies and completion support services will need to be expanded to improve these outcomes. By taking a critical look at systems and retention rates, and understanding where students drop out, institutions can add resources where students need them the most.

There are 243,378 adults in our region who have some college credit, but never finished. The Middle Tennessee Reconnect Community is a new initiative that supports 2,300 of these regional adults who are taking advantage of tuition assistance from the state to complete their college degree. MTRC staff provide high-touch advisement services and connection to community-based resources. In addition, 50 Reconnect Ambassadors, based in 30 employer and community organizations, help adults make the decision to return to school and connect them to a support network.

Nearly two thirds (64%) of area residents with children report satisfaction with their local school district.

K-12 education is a critical factor in where people choose to live in the region. Nearly three fourths (72 percent) of Middle Tennesseans report that the quality of public schools is an important factor in their decision of where to live, with 57 percent believing it is “very important.” Two out of every three people in the region are satisfied with their local school district, ranging from 54 percent satisfied in Davidson County to 85 percent in Williamson County.
POPULATION

Since 2010, our region is the 31st-fastest growing out of 378 metro areas in the United States. Among our joint region’s two million people, more than 160,000 are foreign-born, with more than 40,000 arriving since 2010, increasing the diversity of our residents. Median age in the Nashville MSA is 36.5, up from 35.7 five years ago. Nearly one in eight persons is age 65 or older, up from less than one in 10 in 2010 and projected to increase sharply in the decade ahead.

ECONOMY

Together, the Nashville and Clarksville MSAs are now a $134.8 billion economy. While job growth is at record levels and unemployment is at a low 3.4 percent, aging population and rising job skills and education requirements mean that this region is experiencing an intensifying workforce shortage. By 2021, between $500 and $700 million in losses to regional growth may result from worker shortfall. Attention to regional mobility options, engaging those historically unattached to the labor force and expanding post-secondary educational opportunities are all imperative to meet these growing workforce challenges. Meanwhile, imbalances in income mobility persist. Median household income grew by 11.5 percent in the Nashville region between 2010 and 2015, but household income for African-Americans grew at less than half that rate, at 4.9 percent.

In 2017, people in our region remain optimistic about their immediate economic future, with 82 percent believing their personal financial situation is headed in the right direction, a polling number that has been relatively consistent since 2014. Forty-six percent of residents believe the area’s economy will improve over the coming year, contrasted with only 16 percent believing it will worsen. Most Middle Tennesseans-68 percent-believe they are better off financially than their parents were at their age, but half believe children in our community will be worse off financially than their parents.

AFFORDABILITY

Hourly Wages Needed to not be Cost Burdened

Cost burdened: having to spend more than 30% of your gross income on housing.

Workers must earn $17.63 an hour to afford median rent.

Affordable, safe housing is key to the economic and physical wellbeing of residents. Households spending 30 percent or more of income on housing are cost burdened and expenditure of 50 percent or more greatly increases risk of homelessness. In this environment, Nashville area home sales prices have increased 60 percent in five years, now topping a median of $285,000. To avoid being burdened by the cost of housing, workers in our region must earn approximately $17.65 an hour to afford median rent. Many communities struggling with high housing costs rely on a robust transit system to expand access to a broader range of housing choices.

Source: U.S. Census, American Community Survey, 2015
ABOUT VITAL SIGNS

Nashville Region’s Vital Signs is a collaborative process led by the Nashville Area Chamber of Commerce to track key issues that impact the region’s well-being and quality of life and activate community-driven solutions to address them. The Chamber’s Research Center leads the data collection for the project, and the Nashville Area MPO is the Chamber’s lead partner in the effort. Every October, the Chamber releases the Vital Signs report, which forecasts emerging challenges and identifies potential solutions.

Nashville Area Chamber leaders began making plans to launch the initiative, modeled after Toronto’s Vital Signs, after the Leadership Study Mission to Toronto in 2011. The Nashville region has joined a growing list of international cities using this framework. The Vital Signs process was created in 2001 by Community Foundations of Canada to be a broad community agenda-setting mechanism that focuses on outcomes and solutions to key community issues. The Vital Signs trademark is used with permission from Community Foundations of Canada.

Learn more about Nashville Region’s Vital Signs at nashvillechamber.com/vitalsigns