

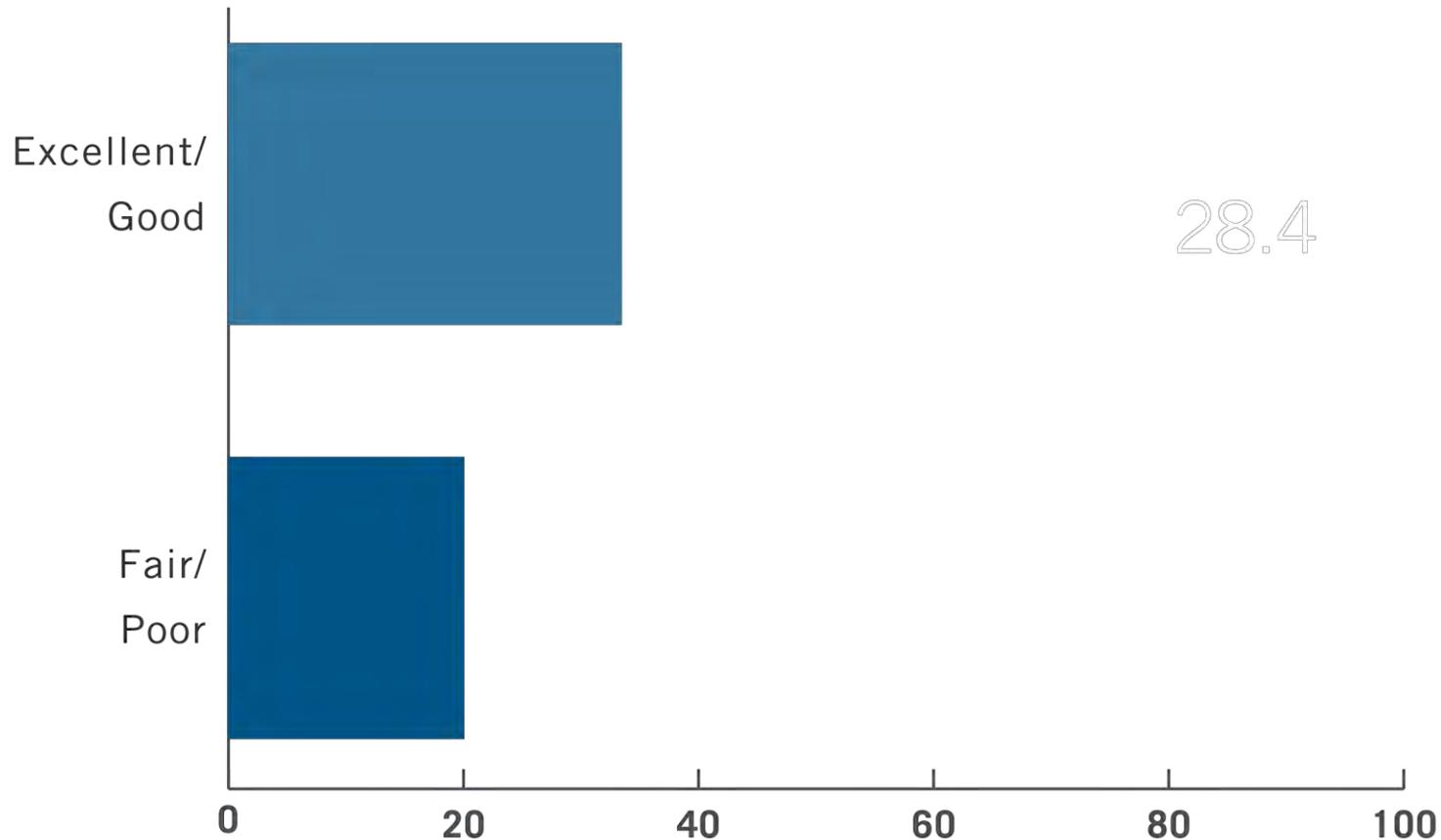
2017

2017
OUTLOOK
WILLIAMSON

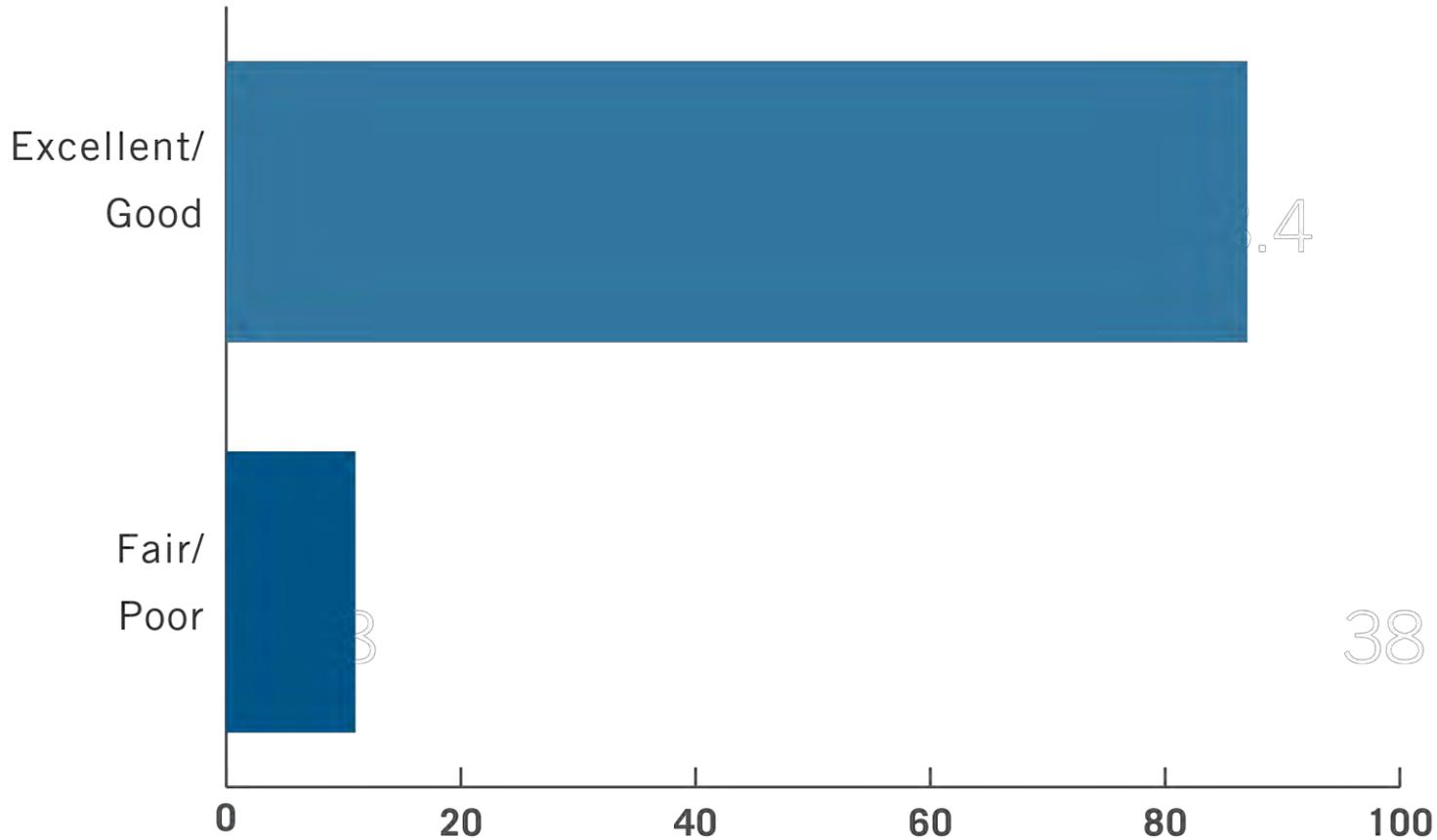


#Outlook2017

Rate The Conditions Of The **U.S.** Economy Today:



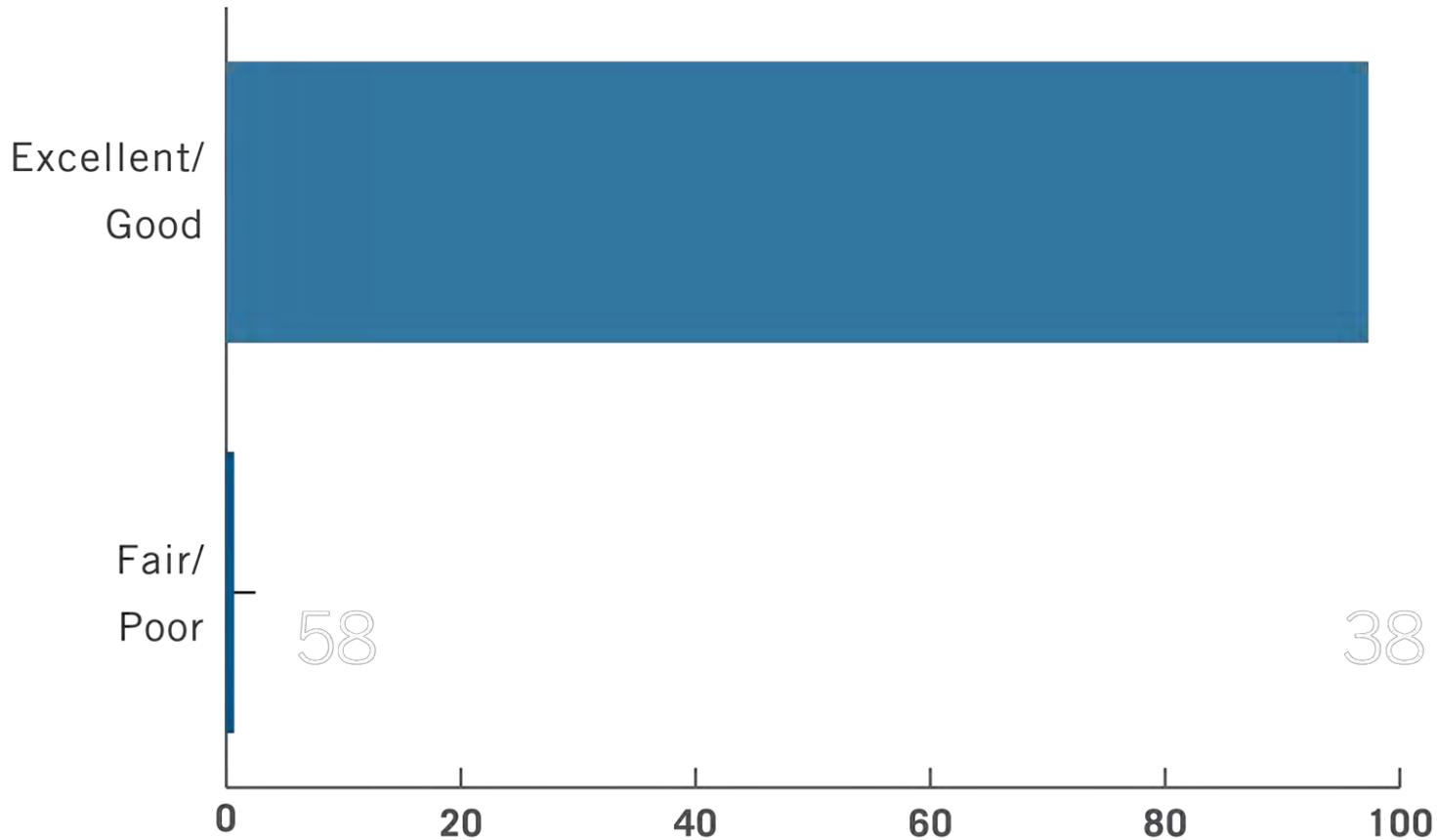
How Would You Rate the **Nashville** Economy Today:



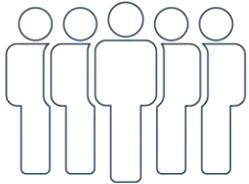
Source: Vanderbilt University Center for Study of Democratic Institutions, February 2017

#Outlook2017

How Would You Rate the **Williamson County** Economy today:



Who we are



Population



Resident

216,717

Williamson County
population (3.25% of
Tennessee's population)

12%

of Nashville Metropolitan
Statistical Area (MSA)

38.9

Median Age

60%

of Williamson County
residents were born in a
different state

7%

of the population in
Williamson County
was not born in the US

\$70,537

Average Earnings

Top 5 Regions

outside of TN migrating
to Williamson County:

Los Angeles, CA

Las Vegas, NV

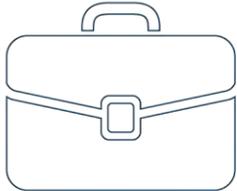
Lewisburg, WV

Montgomery, AL

Ft. Meyers/Naples, FL

#Outlook2017

Who we are



Business

1,862

New business licenses
filed in 2016

6.7%

Job growth rate in
2016 (1.2% US average)

3.4%

Unemployment in
Williamson County
(4.4% US, 4.6% TN)

7,951

Jobs added
in 2016

111,360

Williamson County
labor force

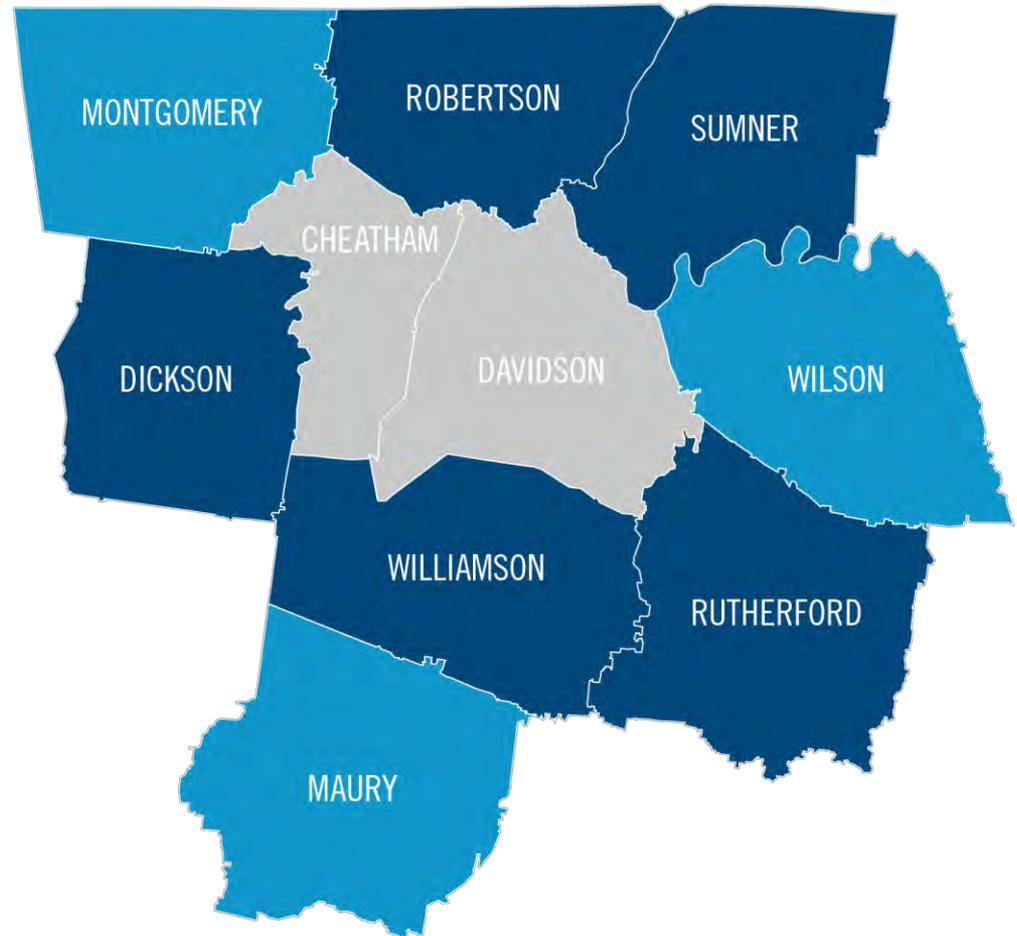
6,333

business establishments
in Williamson County

Regional Job Growth

Five Year Job Growth

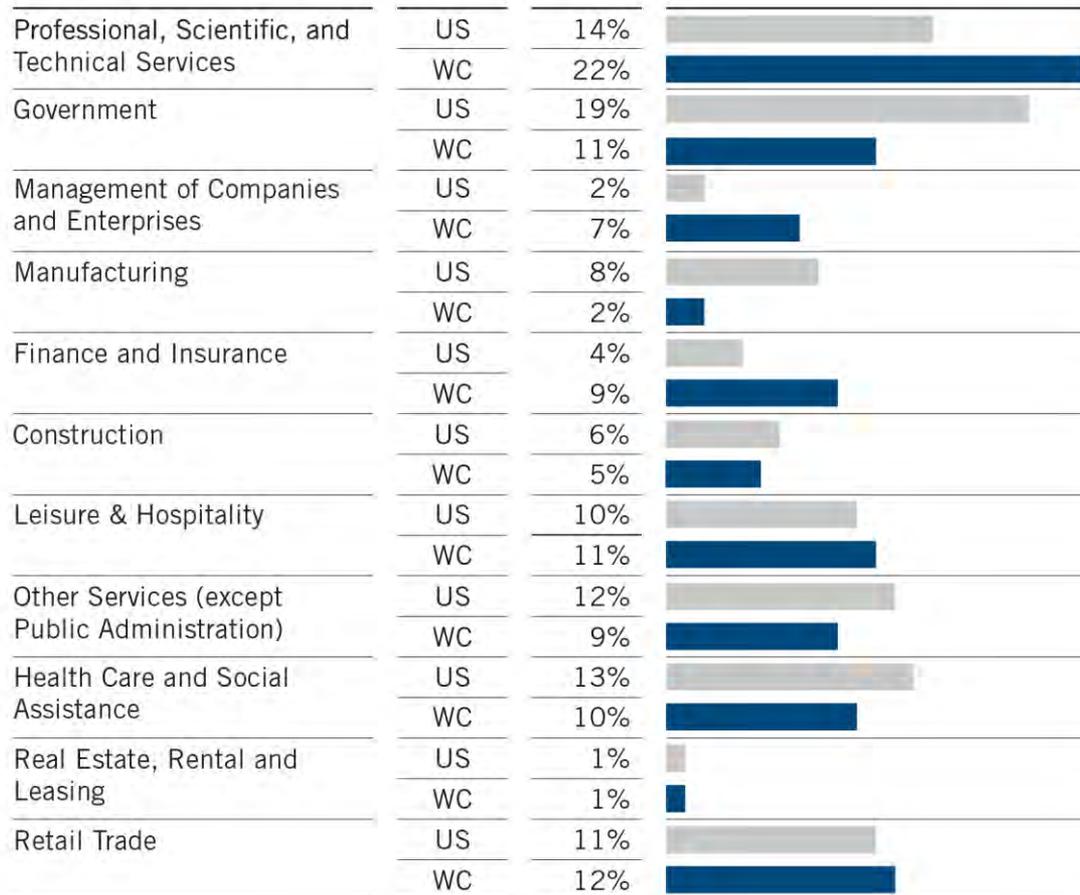
Williamson	29%
Sumner	28%
Robertson	27%
Dickson	23%
Rutherford	23%
Maury	16%
Montgomery	15%
Wilson	11%
Davidson	9%
Cheatham	5%



■ 1–10% Growth ■ 11–20% Growth ■ 21–30% Growth

Industry Diversity

Industry Breakdown



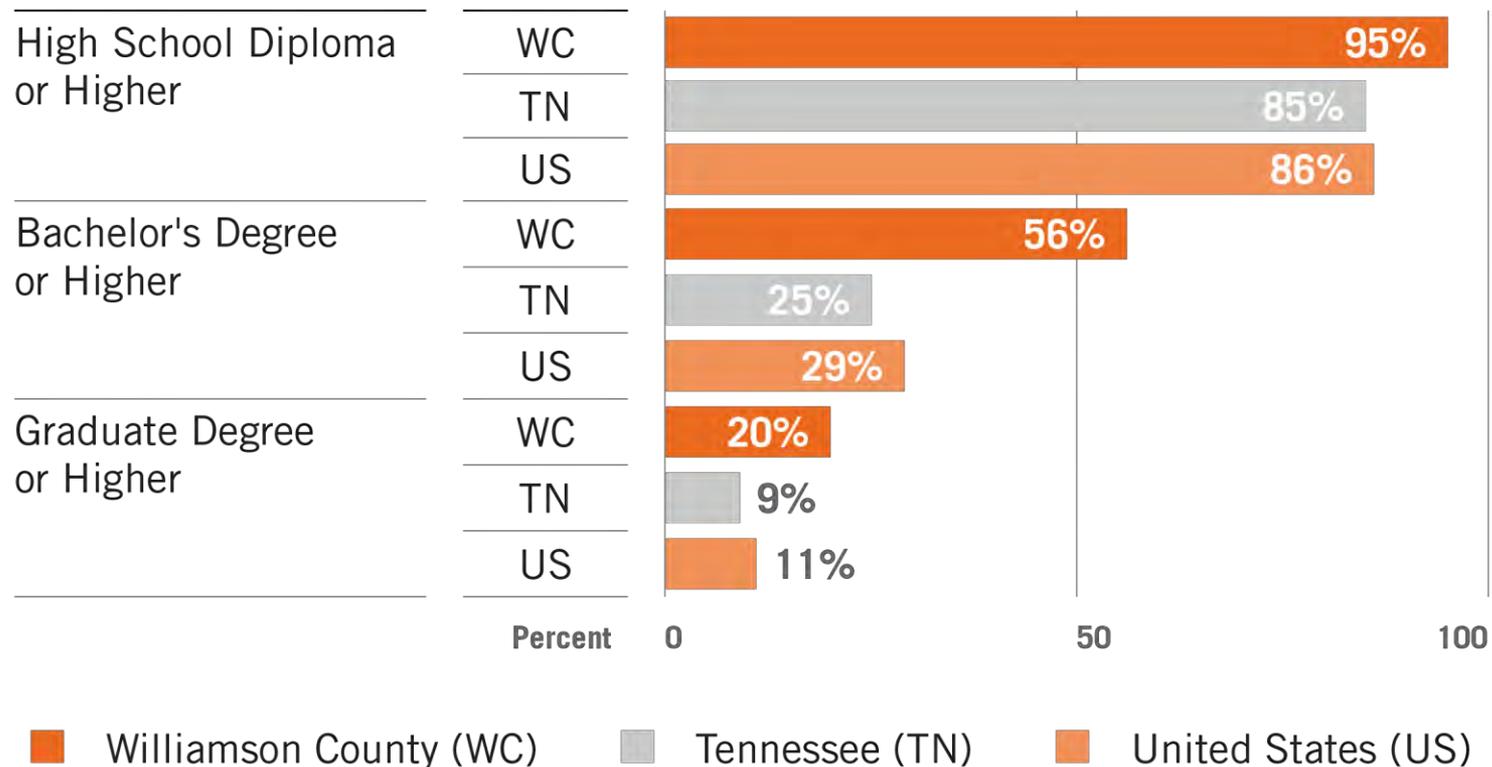
ONE IN FIVE
MANAGEMENT
JOBS IN TN IS IN
WILLIAMSON
COUNTY

Source: Tennessee Advisory Commission on Intergovernmental Relations (TACIR)

■ United States (US) ■ Williamson County (WC)

Educational Attainment

Level of Degree Attainment



Source: EMSI 2017.1 Class of Worker

#Outlook2017

Academic Achievement

\$145 Million

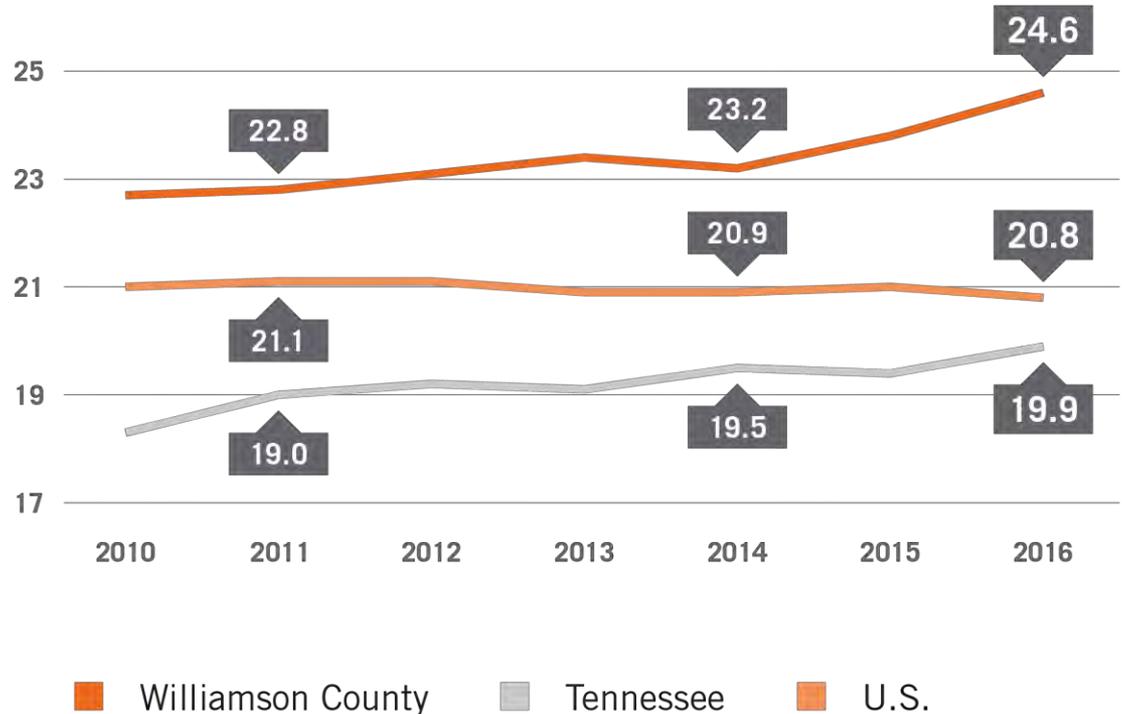
Amount of scholarships offered to Williamson County high school class of 2016.

100%

of Williamson County students take the ACT, even if they are not college bound.

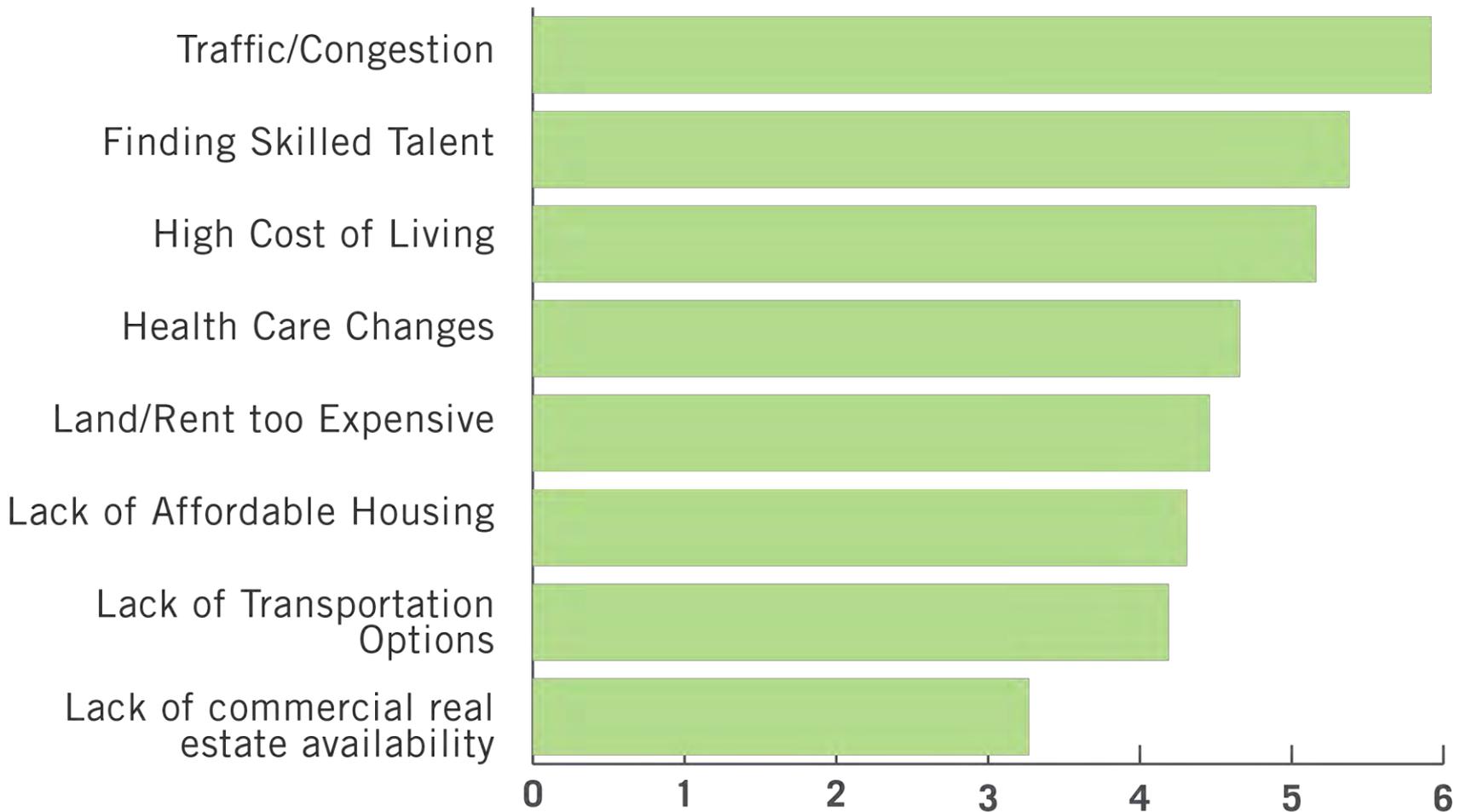
Source: Williamson County Schools

Average ACT Score by Year

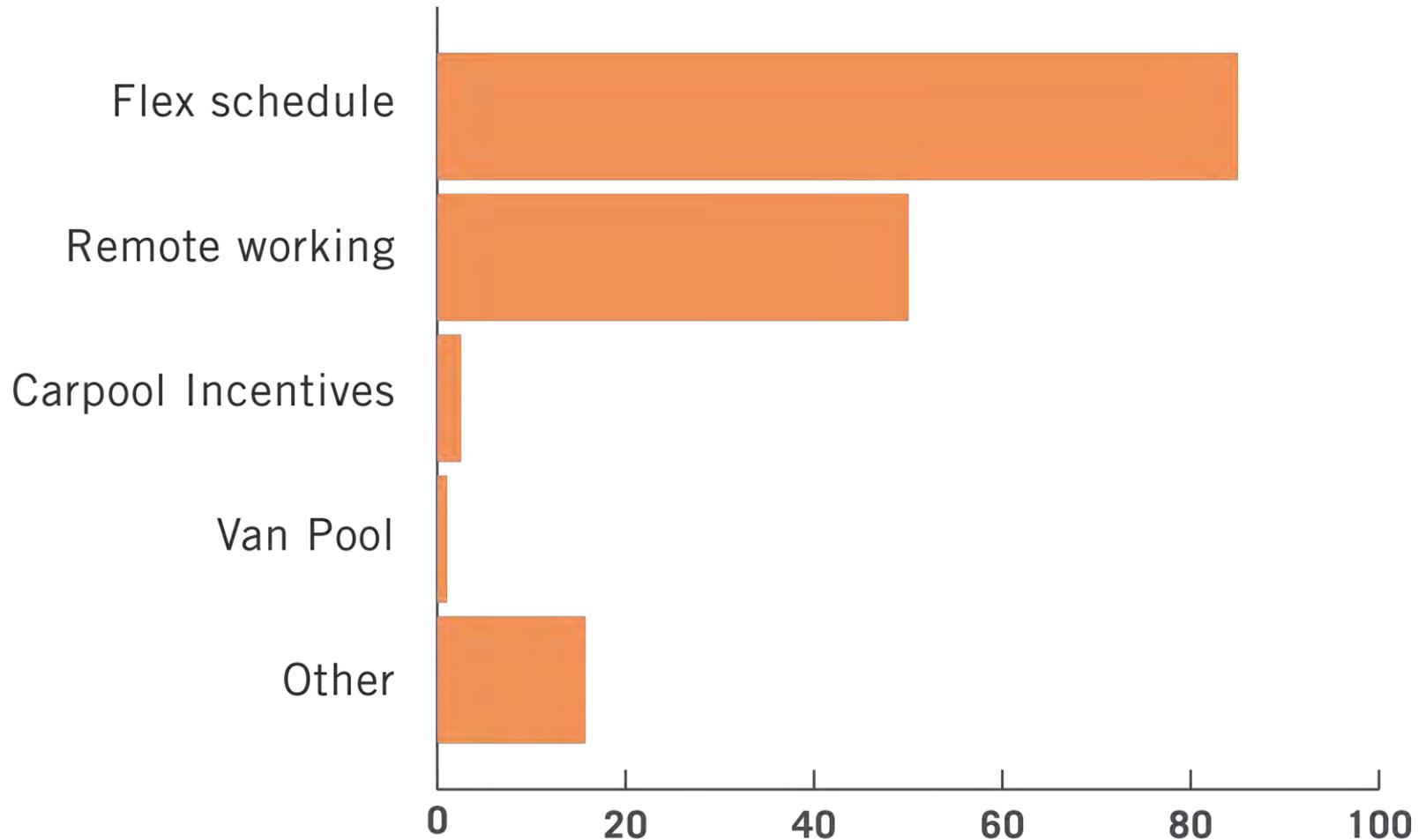


Source: TN Dept. of Education

In order of importance, rank what you see as the biggest challenges to business profitability:



Which of the following benefits do you offer to employees as a way to retain talent:



Transportation

26,793

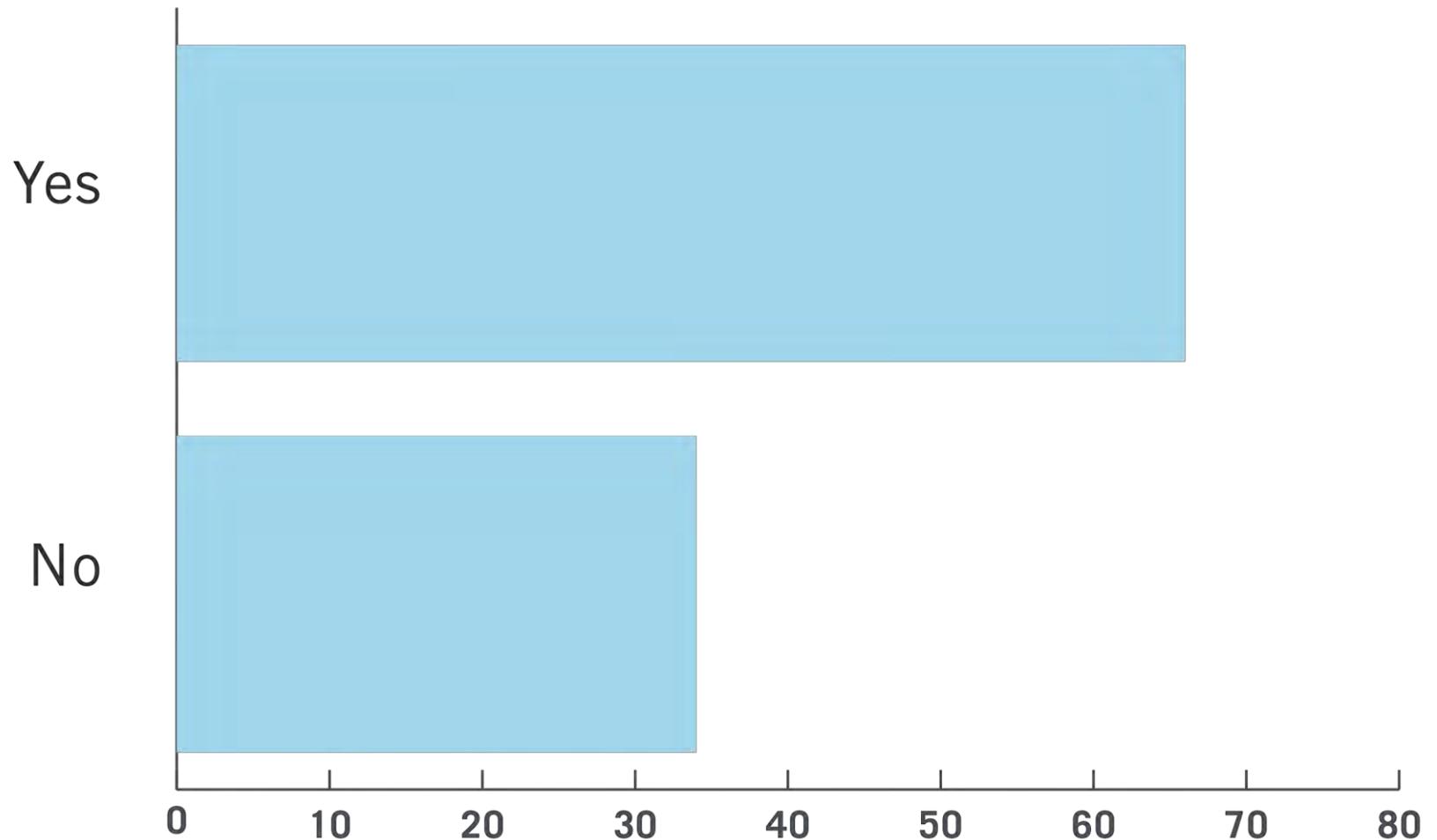
Davidson County
residents commute
to Williamson County
every day

28,157

Williamson County
residents commute
to Davidson County
every day



Would you support raising taxes to pay for transportation improvements and/or mass transit?



WILLIAMSON FORWARD



DESTINATION
DENVER



SEPTEMBER 18 - 20, 2017

**DENVER, CO & SURROUNDING
COMMUNITIES**

CEO/COMMUNITY LEADER OR DESIGNEE



EMAIL ABBY@WILLIAMSONCHAMBER.COM FOR REGISTRATION INFORMATION



Top 8 Critical Site Selection Factors

#1: Availability of Skilled Labor

It pretty much goes without saying that any operation — new or expanding — will need an adequate supply of workers who have whatever skills are required to do the job well.

#3: Occupancy OR Construction Costs

It's easy to see why occupancy or construction costs are a factor that a lot of people are keeping an eye on...these costs are trending upward.

#2 Quality of Life

What constitutes quality of life depends largely on the eye of the beholder, and that eye may gaze through different lenses at different times.

#4: Labor Costs

How labor cost impacts total cost depends on the type of project being considered—headquarters, data centers, call centers/back office, retail, warehouse/distribution, manufacturing, etc



Top 8 Critical Site Selection Factors

#5: Proximity to Major Markets

With the ever-growing passion for faster customer delivery, proximity to major markets is becoming an increasingly important site selection factor.

#7: Image Matters

Location can say a lot about a company's brand image.

#6: State and Local Incentives

States are highly competitive with each other for investments and jobs and therefore offer incentives that can help offset project and operating costs and make a significant impact in the final decision.

#8: Stability of community infrastructure

Financial strength, commuting patterns, amenities, major airport proximity.



Additional Site Selection Factors

Highway Accessibility

It is, of course, no coincidence that nearly all of the nation's biggest manufacturing facilities and distribution centers can be found alongside major highways.

Business Strategy

Consolidation, organizational alignment and real estate efficiency.

Energy Availability and Costs

Energy availability and costs are important for every project, but especially critical for industries that consume large amounts of energy, such as manufacturing, distribution, and data centers.

Talent Acquisition

Migration to urban areas in some cases, quality of place, talent feeders.



Additional Site Selection Factors

Customer Base

Proximity to clients or speed to market.

Available Buildings

People expect near-instant delivery on just about everything these days, and companies seeking new facilities are more likely than ever to want to pick a location and have it up and running as quickly as possible.

Corporate Tax Rate

In today's world, corporate decision-makers want to invest in areas with a "fair" tax structure.



Robert Gage, III

Vice President
Al. Neyer



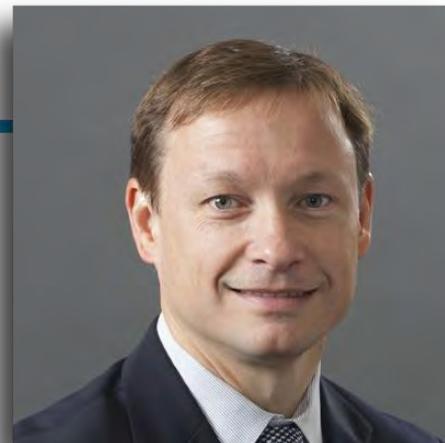
James W. Granbery

Chairman & CEO
H.G. Hill Realty
Company



Patrick Emery

President
Spectrum | Emery



Thomas McDaniel

*Director of Office
Properties*
Boyle Investment
Company



O·N·E



FRANKLIN
P·A·R·K



T·W·O



MASTER PLAN

FRANKLIN PARK
UNIVERSITY CENTER

FP
THREE

FP
TWO

FP
ONE

SPECTRUM EMERY
ARCHITECTS

FP
FRANKLIN
PARK





T·H·R·E·E

ROOF TERRACE



FRANKLIN
P·A·R·K



MALLORY GREEN



Courtesy of
Reztark

MALLORY GREEN lounge/lobby view

Let's think outside the box!



HILL CENTER
BRENTWOOD

In an effort to help reduce traffic, ease parking and make your commute to work less stressful and more affordable, Hill Center Brentwood is partnering with Hytch to offer you some great incentives!



Hytch a ride!

Hytch, a Nashville based company, has developed a service that brings old-fashioned carpooling into the digital age. Riders download the app for free and use it to find a ride and even contribute to the driver's cost of gas.

Hill Center Brentwood employees electing to be a Hytch driver can be certified for free for the first year and receive a designated Hytch parking spot.* Sign up as a rider using Hytch and we will reimburse you up to \$50 per month for six months. For more information on how Hytch works, visit www.hytch.me/employers.



Reimbursement will occur on a monthly basis. Receipts or records of expense should be emailed to your employer.

* There are only two parking spots available in the parking garage for Hytch drivers and will be offered on a first come, first serve basis.

March 2017



HILL CENTER BRENTWOOD



dental
innovations
TN, KY, AL

BERRY FARMS

MASTER PLAN

3,000,000 SF Class A Office

1,800,000 SF Retail

1,100 Residential Units

The Berry Farms master planned development contains 3 distinct commercial districts:

Town Center

Chadwell

Reams Fleming

*Entitlements equate to 80%
of the original Cool Springs.*

BOYLE.

BOYLE INVESTMENT COMPANY
(615) 550-5575 • BOYLE.COM



BERRY FARMS



BOYLE.

BOYLE INVESTMENT COMPANY • (615) 550-5575 • BOYLE.COM

Northside McEwen



BUILDING TYPOLOGY		OVERALL SITE DATA	
	HOTEL	+/- 45 TOTAL ACRES	
	OFFICES	BLOCK A	BLOCK E
	RESIDENTIAL	21,660 SF RETAIL	13,600 SF RETAIL
	RETAIL	64,800 SF OFFICE	226,124 SF OFFICE
	PARKING GARAGE	150 KEY HOTEL	891 PARKING SPACES
	MIXED USE - RETAIL GROUND FLOOR	86 RESIDENTIAL UNITS	
		643 PARKING SPACES	
		BLOCK B	BLOCK F
		25,678 RETAIL	164 RESIDENTIAL UNITS
		192,917 SF OFFICE	290 PARKING SPACES
		87 RESIDENTIAL UNITS	CLUBHOUSE
		813 PARKING SPACES	
		BLOCK C	BLOCK G
		274 RESIDENTIAL UNITS	219,513 SF OFFICE
		463 PARKING SPACES	1039 PARKING SPACES
		BLOCK D	
		26,100 SF RETAIL	
		73,060 SF OFFICE	
		452 PARKING SPACES	
		TOTAL SITE	
		91,926 RETAIL	
		776,384 OFFICE	
		HOTEL: 150 KEYS	
		580 RESIDENTIAL UNITS	
		<small>NOTE: APPROXIMATE SQUARE FOOTAGE, UNIT COUNTS & PARKING COUNTS ARE CONCEPTUAL AND SUBJECT TO CHANGE.</small>	

Northside McEwen

Bringing a vibrant, urban experience to Cool Springs.



BOYLE.

BOYLE INVESTMENT COMPANY • (615) 550-5575 • BOYLE.COM

MPO Growth Forecasts

10 Most Populated Counties Percentage of Growth by 2040

1	Williamson	153%	6	Knox	47%
2	Rutherford	99%	7	Sumner	36%
3	Sevier	86%	8	Davidson	20%
4	Wilson	80%	9	Hamilton	13%
5	Montgomery	60%	10	Shelby	9%



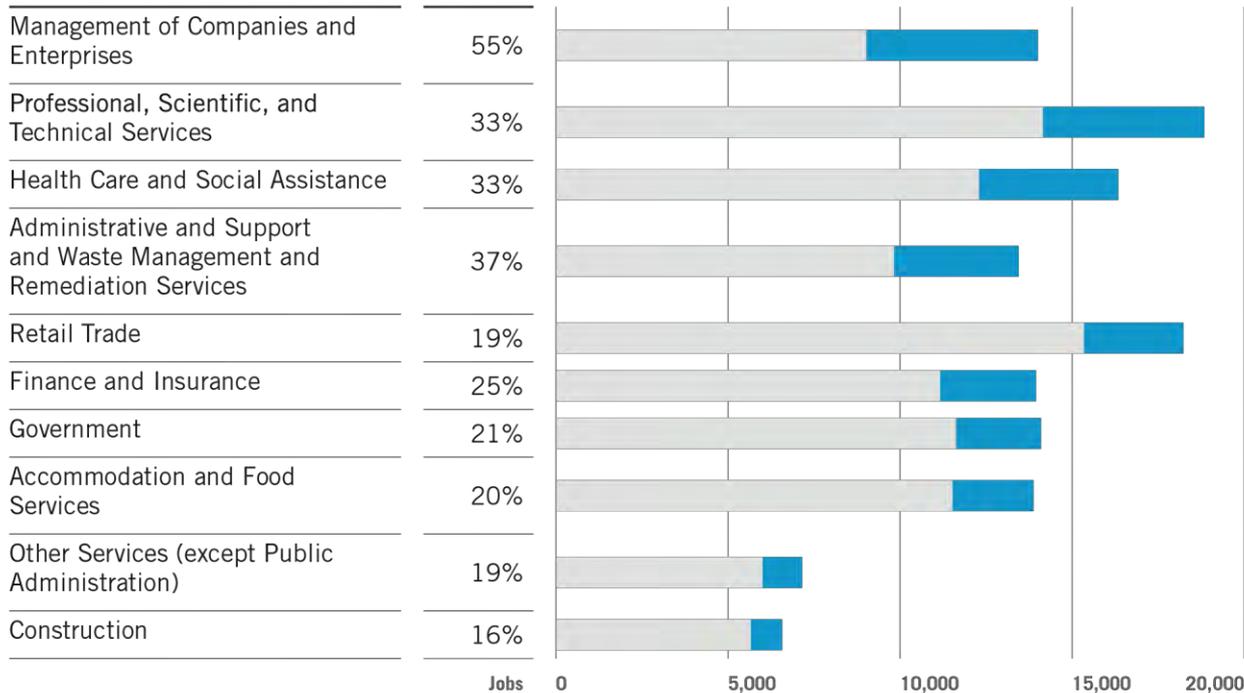
■ 1-30% ■ 31-60% ■ 61-90% ■ 91-120%+ ■ 121%+

Source: Nashville Area MPO 2014 Annual Report; MPO population forecasts, Woods & Poole Economics, U.S. Census

#Outlook2017

10-year Industry Projections

Percentage of Job Growth from 2016 to 2026



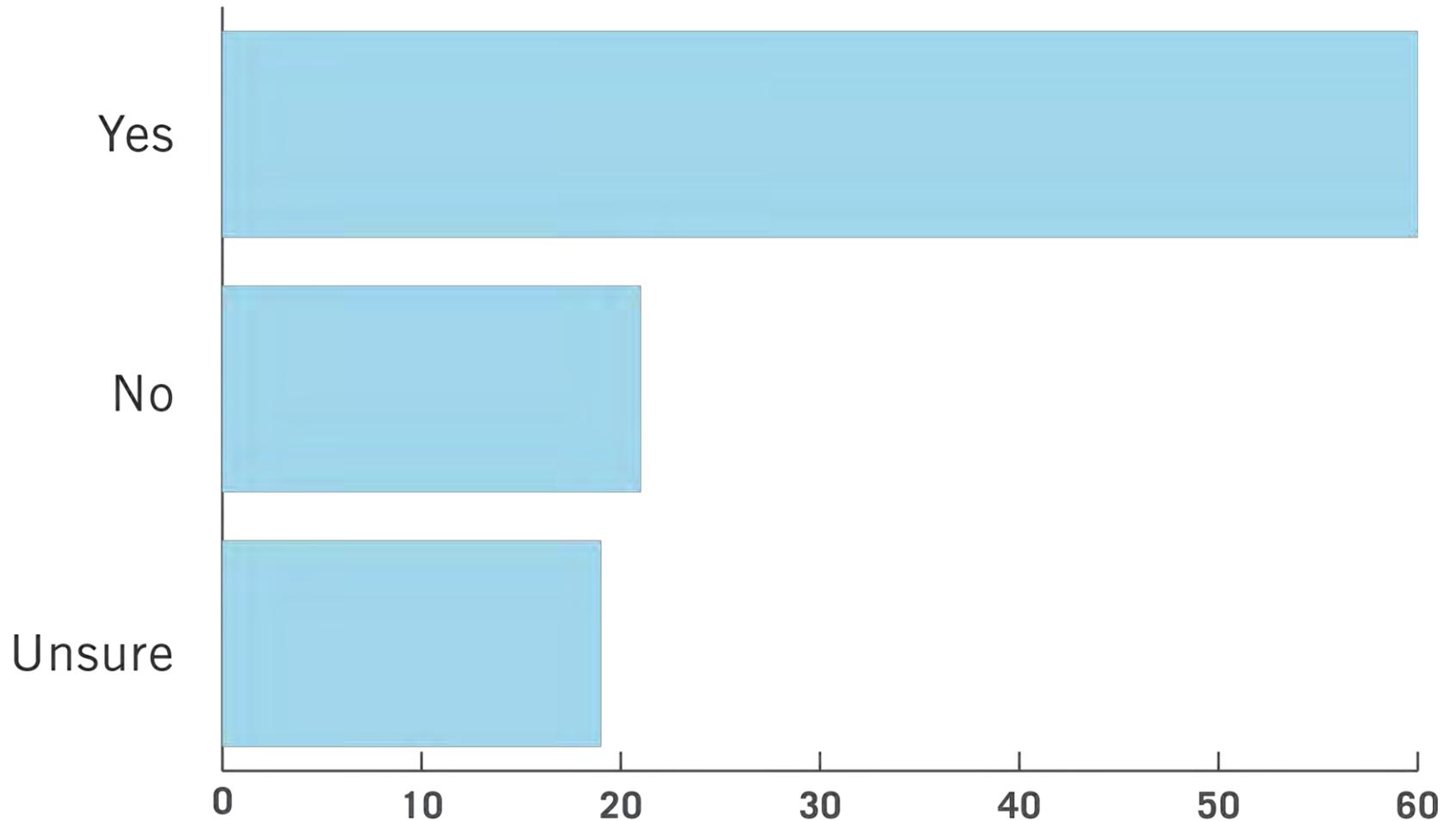
94% of survey respondents rated their business profitability outlook for next year as excellent or good.

2016 Jobs
 2026 Job Growth Estimates

\$97,462

Average earnings per worker in the top three growth industries.

Do you expect your company to hire additional staff over the next year?



If yes, how many?

6,683 total number of staff added by survey respondents

14 mean response

4 median response

2 mode response