

Chapter III. Hendersonville Today

INTRODUCTION

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MARKET ANALYSIS

ISSUES AND OPPORTUNITIES

BIG IDEAS FOR HENDERSONVILLE'S FUTURE

Introduction

EXISTING CONDITIONS

Hendersonville, NC, with its distinctive setting in the Blue Ridge Mountains, grapples with the challenges and opportunities presented by its unique physical, social, economic, and regulatory conditions. This chapter of the plan explores the existing conditions, market analysis, and issues and opportunities that guide urban planning in Hendersonville, delving into their purpose and implications for the City's future. Appendices B. Existing Conditions and E. Economic Development Plan provide further overview of the comprehensive analyses.

The Gen H Plan uses data inventories and assessments as the starting point for a comprehensive and engaging discussion about the future of Hendersonville.

Baseline conditions and emerging trends reported at the time of the planning process were captured from existing data sets, adopted documents, and field observations.

The information was used, in part, to frame a list of themes, observations, and recommendations that should be considered when planning for the city's future. Data inventories and assessments for the Gen H Plan address seven general subjects important to the plan's development:

- Environmental conditions
- Land use conditions
- Mobility conditions
- Infrastructure conditions
- Community character
- Market conditions
- Existing city policies and ordinances

Hendersonville Historic Train Depot (left)

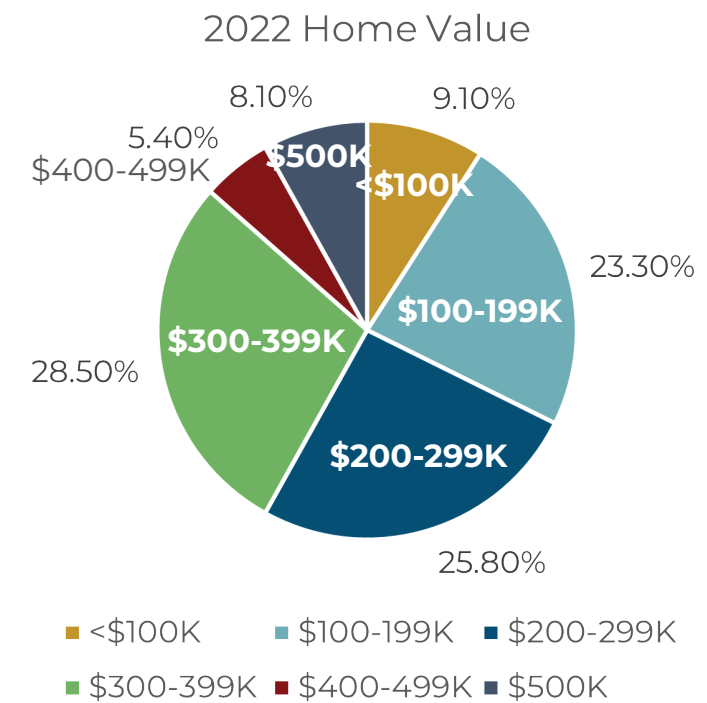
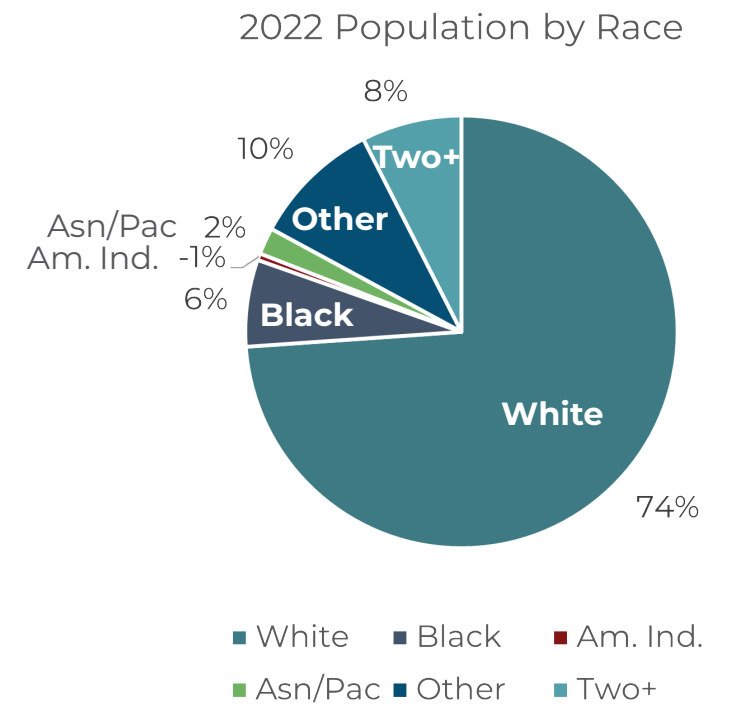
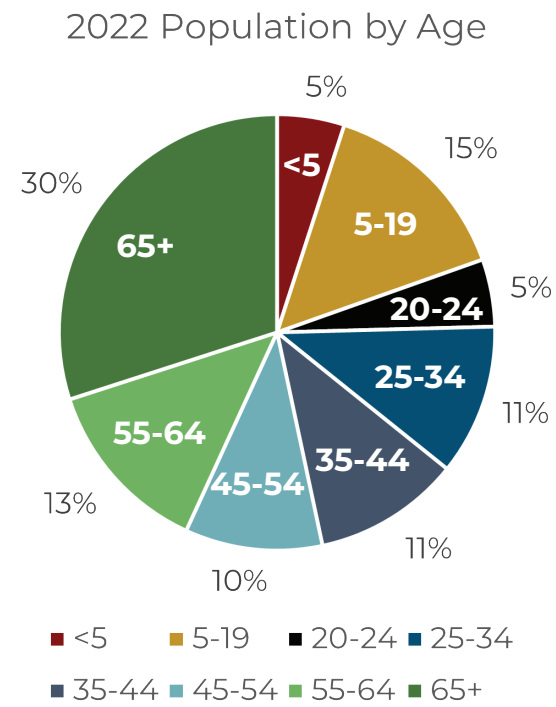
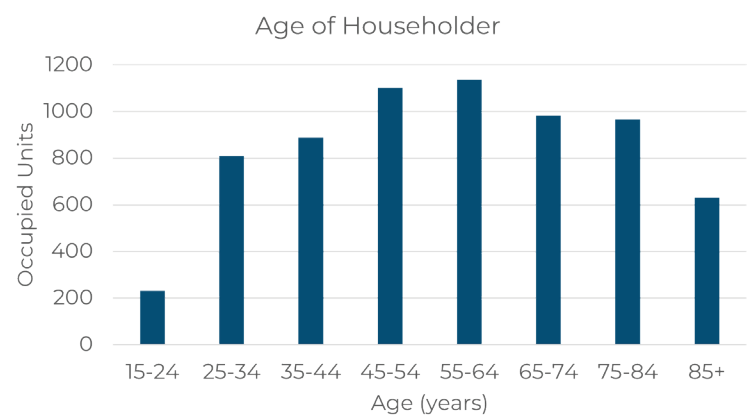
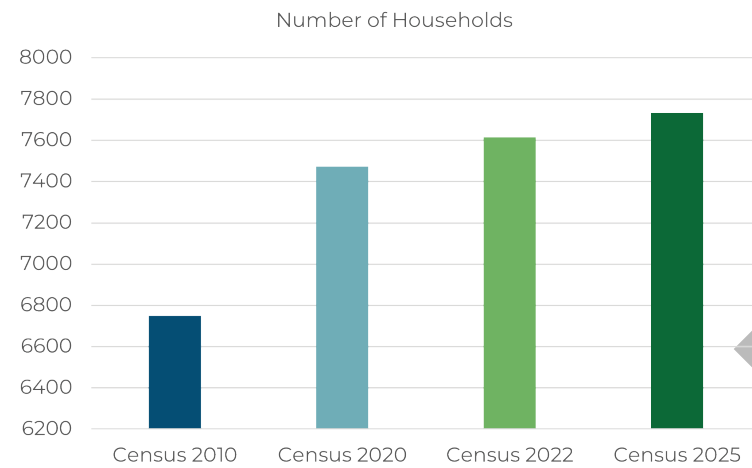
Demographics

DEMOGRAPHICS

Demographic trends, including age distribution, income levels, and cultural diversity, provide insights into the needs and preferences of Hendersonville's residents. This information is critical for market analysis and economic planning, ensuring that development aligns with the city's social fabric.



All ages were invited to participate in the development of the Gen H Plan



DRAFT

Existing Conditions

COMMUNITY CHARACTER

Hendersonville, NC, nestled in the Blue Ridge Mountains, features a diverse environment with clean air, lush forests, and vibrant biodiversity. In addition to its natural beauty, Hendersonville attracts visitors from near and far due to its charming downtown, rich cultural heritage, abundance of nearby summer camps, agricultural landscape dominated or defined by apple orchards, and its apple industry. Investment in, and preservation of these assets are important to Hendersonville's future success.

NATURAL ENVIRONMENT & CLIMATE

Existing water bodies, floodplains and wetlands, watersheds, water quality buffers, vegetation, tree cover, heritage tree designation, topography, and soils were all analyzed. Hendersonville and the region's continued growth and urbanization places pressure on the natural environment.

It is critical to emphasize the need for informed decision-making to balance growth with environmental and agricultural preservation. Monitoring and understanding these existing conditions are essential for sustainable development and growth in this area, especially with the trend of increasing population size.

Hendersonville is known as the "Apple Capital of North Carolina."



Local apples at the NC Apple Festival | City of Hendersonville

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. The land within the city and its extraterritorial jurisdiction (ETJ) totals 9,630 acres. Over half of that land (60%) is developed, within right-of-way (ROW), and not likely to redevelop. Less than 1% is protected through conservation easements and other land protection mechanisms. The remaining land is either undeveloped (vacant) or underdeveloped (and ripe for redevelopment). The "Land Supply" is comprised of these two areas, which in combination encompass 3,832 acres, and it is the area of land to be considered for future development or conservation. Refer to Figure 4.4 Land Supply Map in Chapter IV for additional information.

Most of the committed development is residential, with some of the larger developments consisting of 300 multi-family units and 160 single-

family homes. The City also plans to preserve land with 140 acres of conserved wetlands and restored floodplain.

ZONING AND COMMERCIAL DEVELOPMENT

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. Zoning regulations are crafted with market considerations in mind, ensuring that commercial developments align with market demands and contribute to the economic vibrancy of Hendersonville. These policies play a pivotal role in creating a balanced and thriving business environment.

Within the city limits, the majority of the land is zoned R-15 Medium Density Residential (25.83%), and in the Extraterritorial Jurisdiction (ETJ), R-15 Medium Density Residential covers 48.66% of the land.

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.

MOBILITY

Hendersonville has a network of roads and highways that connect the city with neighboring areas. Major thoroughfares include Interstate 26 and US Route 64. The city has public transportation service operated by Apple Country Public Transit, which is undergoing a feasibility study in reaction to falling ridership.

Downtown seeks to enhance its pedestrian infrastructure, aiming for additional pedestrian facilities that mirror the successful design and connectivity of the existing pedestrian facilities along Main Street.

Relatively heavy peak congestion exists throughout the city along its main corridors and into downtown. A bypass, however, would mitigate some traffic on Four Seasons Boulevard which currently has no alternative connections. Streetscape enhancements are underway for phase 1 of the project along 7th Avenue to improve utilities, enhance mobility, and encourage development.

The City recently adopted the Walk Hendo Plan which identifies opportunities and priorities for pedestrian related improvements.

Based on the Gen H Community 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.

PUBLIC SAFETY & INFRASTRUCTURE

Fire and Police

The City of Hendersonville has dedicated fire and police departments that play essential roles in ensuring public safety and emergency response.

Streets Maintenance

The City's Public Works Department maintains 134 lane miles of city streets. The North Carolina Department of Transportation (NCDOT) maintains several major thoroughfares (U.S. 64, U.S. 176, Highway 25, and Highway 191 - including King and Church Streets, and others).

The Public Works Traffic Division maintains 42 city owned traffic signals on city owned roadways, over 8,000 signs and posts, 301 city owned decorative street lights, 175 historic banners, 5 trail emergency phones, 5 electric car charging stations, over 1,500 parking spaces, & 27 parking kiosks within the city.

Street Lighting

Through Duke Energy, the city has more than 1,800 streetlights and maintains numerous outdoor lights in public areas.

Solid Waste

The City of Hendersonville Environmental Services Division provides weekly pickup of solid waste, recycling and yard waste.



Hendersonville Police Department attends a community event

Utilities

Public Service Company of North Carolina (PSNC) currently is the sole supplier of gas to Hendersonville.

Duke Energy and Carolina Power & Light (CP&L) provides electricity to Hendersonville.

Phone service is offered by multiple providers including, but not limited to BellSouth, Verizon Wireless, AT&T, and Sprint.

Hendersonville has 100% residential broadband coverage with fixed speeds of 25/3 Mbps or greater.

Water and Sewer Service

Hendersonville Water and Sewer provides water service to over 31,000 homes and businesses in Hendersonville and Henderson County as well as sewer service to over 10,000 homes and businesses. About 78,000 people are being served with water and over 21,000 people receive sewer service.

Stormwater Service

Hendersonville's Stormwater Management Program works to preserve, protect, and restore the quality of water in the streams, rivers, and lakes within the City of Hendersonville.

Sustainability

The Sustainability Division was created in 2023 under the Public Works Department to strengthen the City of Hendersonville's commitment to sustainability. The division is also responsible for incorporating City Council's goals and City Resolutions pertaining to sustainability within the organization. Efforts are divided into five key focus areas: energy, transportation, waste management, water, and land management.

Adopted May 2024 the Sustainability Strategic Plan outlines measurable goals and actions to reduce the City's overall impact on the environment while strengthening communities, to ensure a prosperous future now, and for generations to come.

This plan addresses challenges with a path forward on actionable and measurable opportunities to reduce the City's municipal greenhouse gas emissions by 30% by 2035.

Based on the Gen H Community Survey, the majority of participants ranked land management to be the most important area of sustainability (82%) with protection of water bodies being ranked second highest at 72%.

Parks and Recreation

Hendersonville boasts a number of well-maintained parks that provide recreational spaces for residents and visitors. The Hendersonville Parks and Greenspace Master Plan is being developed concurrently with the Gen H Plan, ensuring a coordinated approach to community development and the provision of recreational facilities and programs.

In 2019, Henderson County adopted the Greenway Master Plan with a long-term, 30-year vision. The plan aims to create a safe, accessible, comprehensive and connected system of constructed greenway trail that enhances quality of life throughout Henderson County by providing opportunities for transportation, recreation, public health, economic development, and environmental stewardship.

Based on the Gen H Community 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%).

Market Analysis

MARKET ANALYSIS AND ECONOMIC POLICIES

Market and economic analyses play a crucial role in shaping policies related to land use and economic development. Strategies that balance growth with preserving the city's character are designed to foster economic vitality while maintaining the unique charm of Hendersonville. Understanding market dynamics involves assessing demand and supply in various sectors, including real estate, retail, and services. Market analysis informs land-use policies, guiding the development of commercial and residential spaces that align with the needs and aspirations of the community.

A comprehensive examination was completed studying various economic factors and trends impacting Hendersonville. The analysis encompassed a wide range of economic sectors, including real estate, retail, hospitality, and services.

One notable conclusion was that the city's steady population growth has contributed to increased demand for housing and retail spaces. The real estate market exhibited resilience, with property values showing a consistent upward trajectory. Additionally, the study highlighted a reinvigorated tourism sector, driven by Hendersonville's scenic beauty and eco-tourism attractions, leading to increased demand for hospitality and leisure-related businesses.

The retail sector saw a shift towards sustainable and locally sourced products, reflecting the community's values. Conclusively, the market analysis positioned Hendersonville as a thriving market with diverse opportunities for businesses, encouraging strategic planning and investment in alignment with the identified trends and demands.



1 IN 4 JOBS ARE RETAIL

RETAIL IS ECONOMIC DEVELOPMENT

Full-time Non-retail Workers (25 - 34)

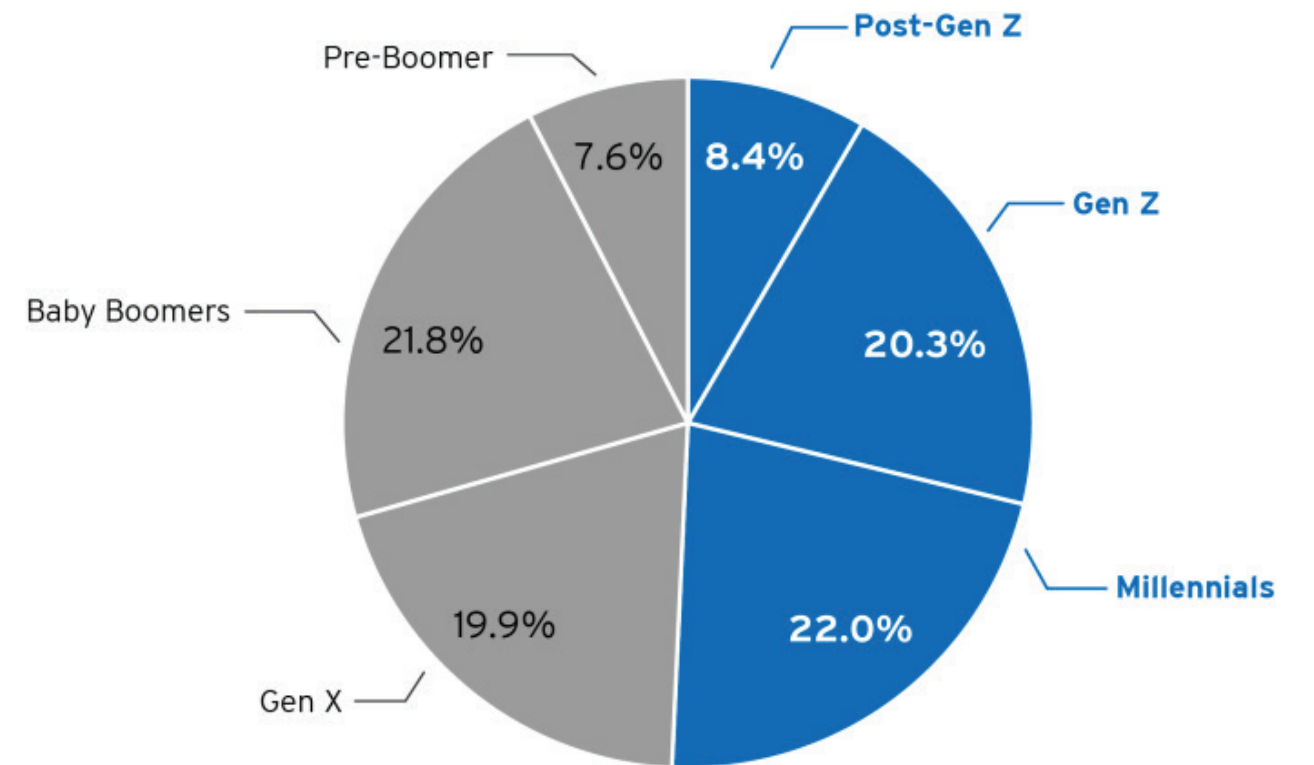
\$34,368



Full-time Retail Workers (25 - 34)

\$35,376

MILLENNIALS, GEN Z & THE FUTURE CONSUMER



TAPESTRY SEGMENTATION

ESRI, a GIS mapping software, develops tapestries from a market segmentation system built from using a large, well-selected array of attributes of demographic and socioeconomic variables to identify numerous unique consumer markets throughout the United States. These segments reflect demographic shifts over the last decade to established consumer markets, as well as the emergence of new markets due to population growth, demographic and socioeconomic change, and transforming consumer behavior.

Hendersonville's top two Tapestry segments are:

- Old and Newcomers - 22.9%.
- Midlife Constants - 22.3%.

OLD AND NEWCOMERS

- Average labor force participation rate of 62.6%, despite increasing number of retired workers.
- 32% receiving Social Security.
- 31% have a college degree.

- Price aware and coupon clippers but also impulse buys.
- Attentive to environmental concerns and comfortable with the latest technology.

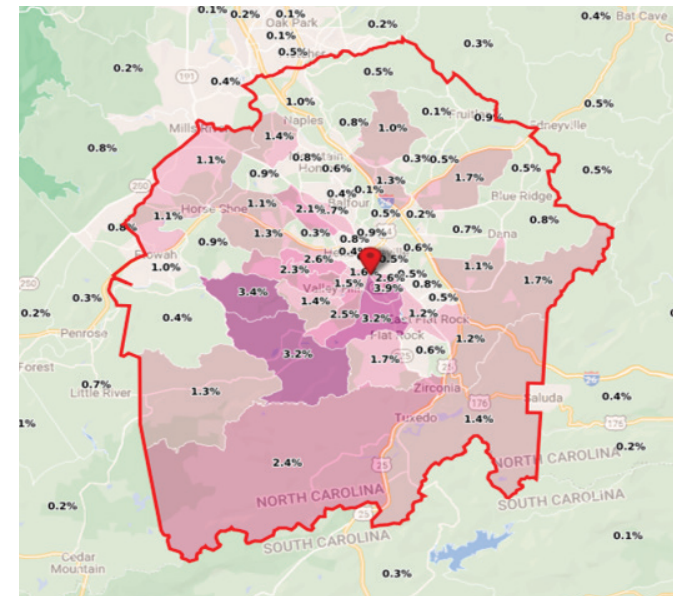
MIDLIFE CONSTANTS

- 63% have a high school diploma or some college.
- Low labor force participation rate of 31%.
- 42% receiving Social Security.
- Traditional, not trendy; opt for convenience and comfort not cutting edge.
- Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

MOBILE DATA COLLECTION

Mobile data tracking uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information accurate to approximately 20 feet. Data inputs are updated as quickly as every 24-hours.

The data shown here includes shoppers who visited the selected Publix location during a 1-year time period. This tool identifies where consumers are coming from to shop in the Hendersonville market (Custom Trade Area).

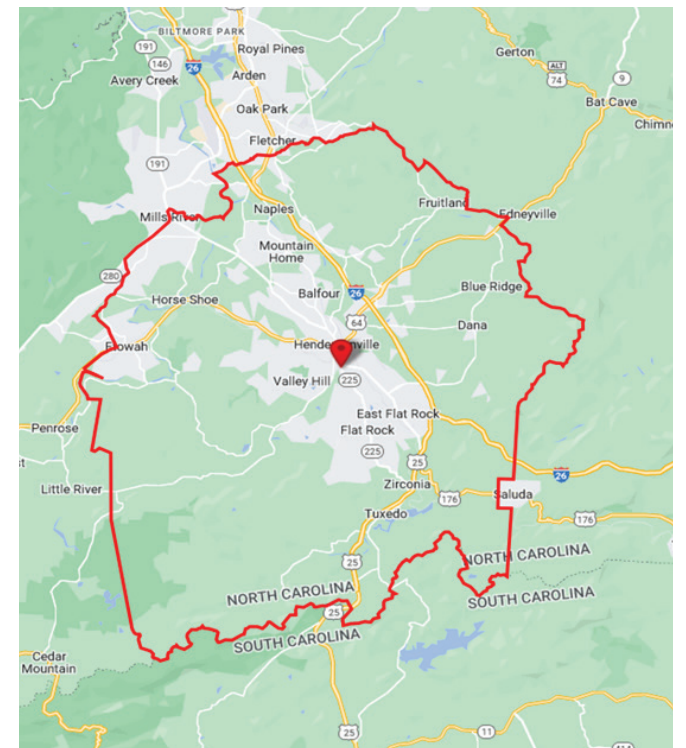


Publix	Estimated Annual Visits	96,886
635 Greenville Hwy	Repeat Visitors	43%
Hendersonville, NC	Tourist Visits	8.6%
Grocery	Average Distance From Home	4.91 mi
Publix	Average Dwell Time	22 min

CUSTOM TRADE AREA

Each retailer has a specific set of site selection criteria they use to determine if they will have a profitable store. Municipal boundaries, radius rings, and drive time areas are a start.

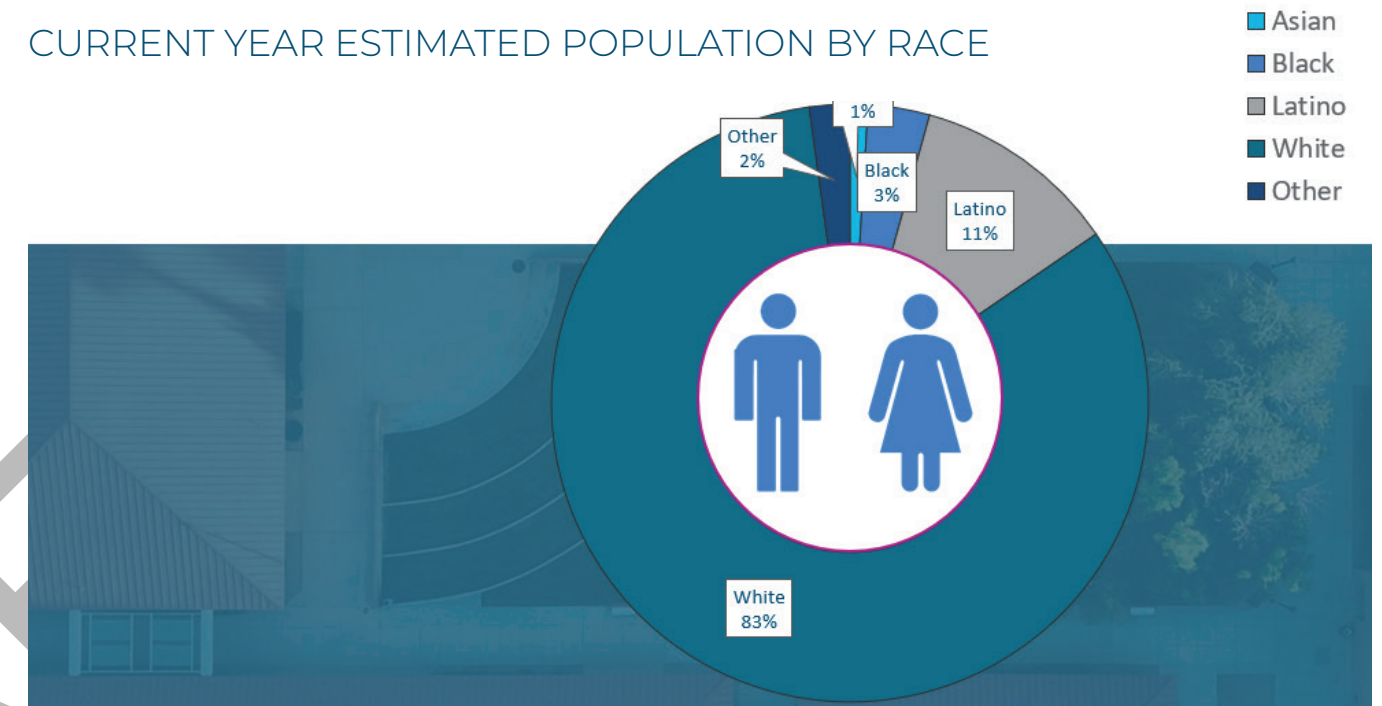
A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month.




CUSTOM TRADE AREA DEMOGRAPHICS

- Projected to add roughly 5,000 people by the year 2027
- Predominately white (83%) and Latino (11%) population
- Almost 50,000 housing units
- About 15% vacancy
- Average housing unit value, approximately \$475k, significantly more than other cities in the region:
 - Asheville - \$453k
 - Greenville, SC - \$350k
 - Spartanburg, SC - \$300k

CURRENT YEAR ESTIMATED POPULATION BY RACE



98,371
Projected 2027
Population



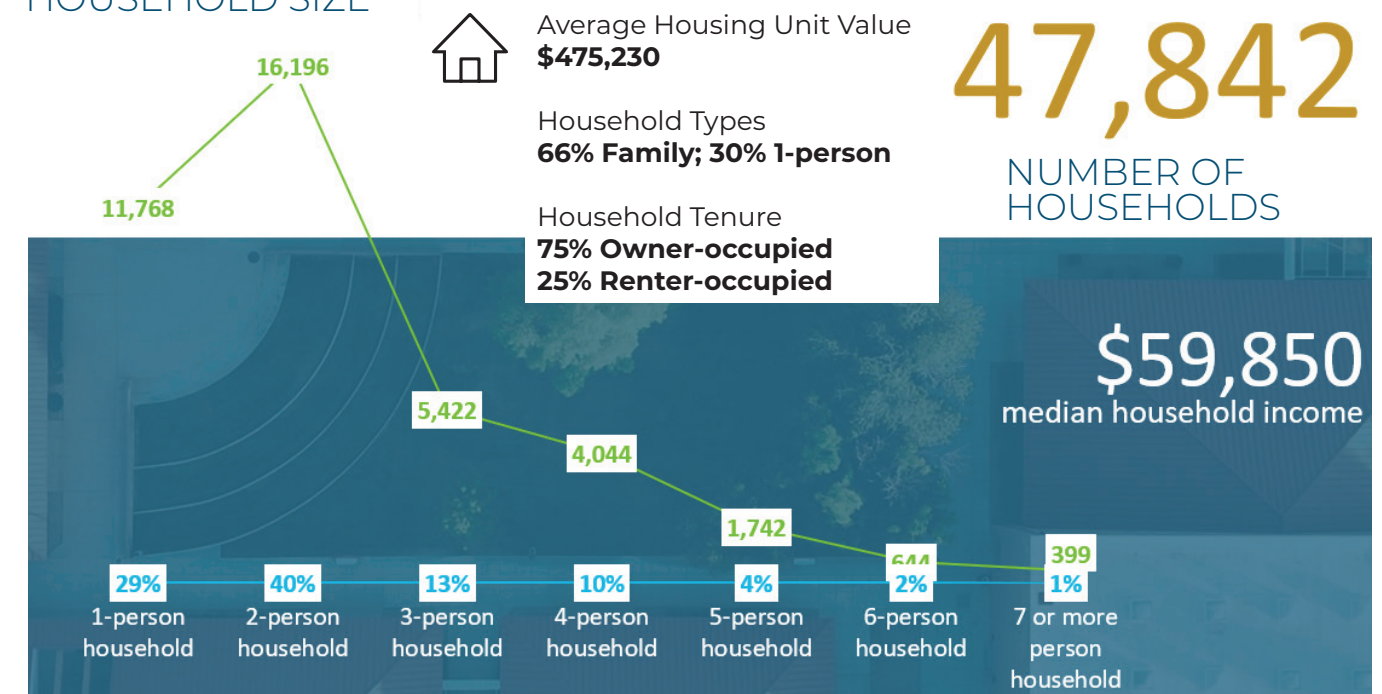
93,554
Estimated CTA
Population

5.2%
Projected growth
Rate 2022-2027

42
Male Average Age

46
Female Average Age

CURRENT YEAR ESTIMATED HOUSEHOLDS BY HOUSEHOLD SIZE



CUSTOM TRADE AREA GAP ANALYSIS

The GAP Analysis helps 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 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).

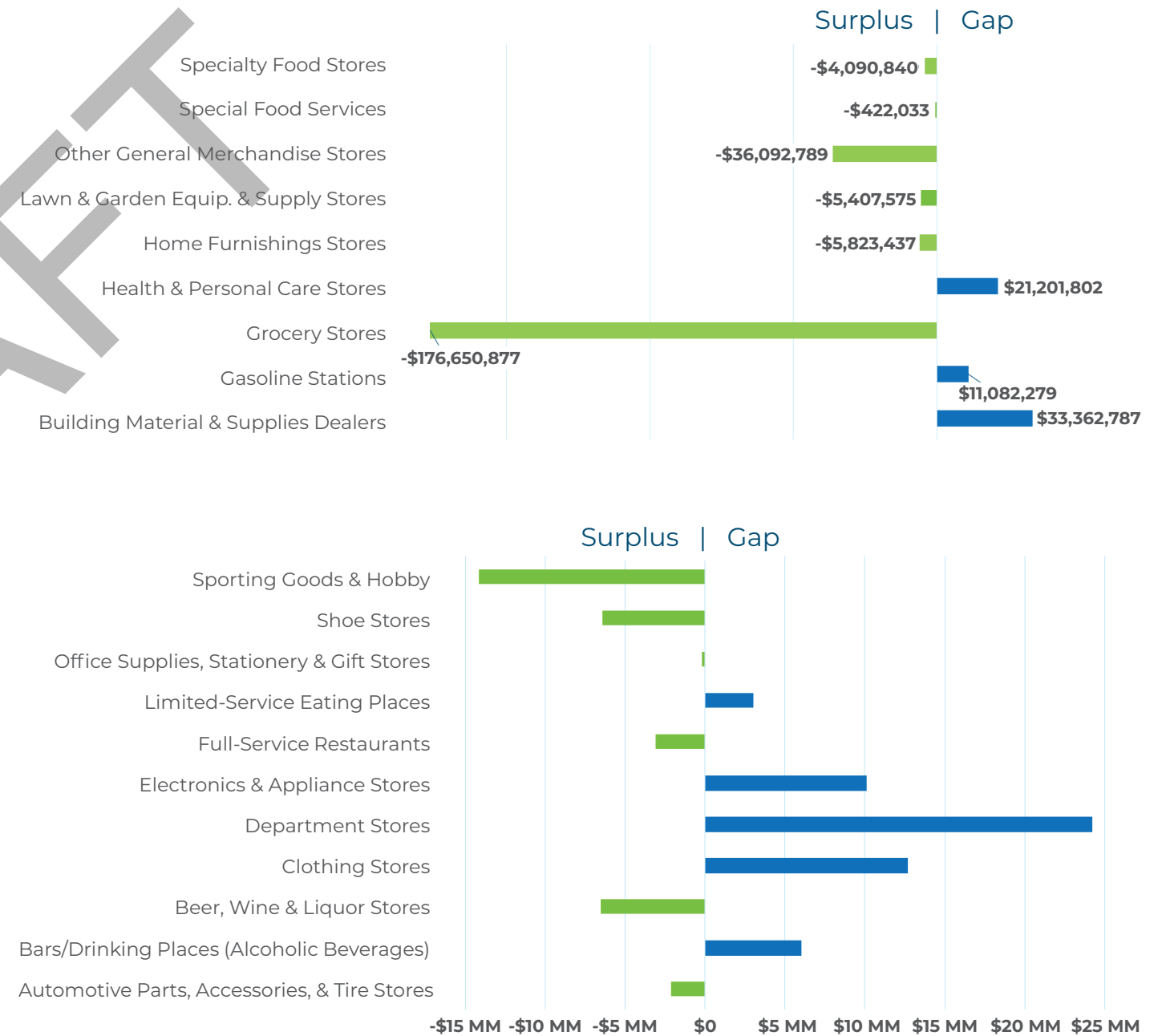
The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis

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.



Mast General Store on Main Street in downtown Hendersonville is a regional retail chain store

A positive value signifies an opportunity gap, while a negative value signifies a surplus



Issues & Opportunities

Through the Gen H Plan process, stakeholder engagement, policy analysis, and data and existing condition analysis, issues and opportunities emerged. Future planning for Hendersonville should promote integration of social and geographic considerations with market realities and economic dynamics. A comprehensive approach will allow for the city to navigate its unique challenges and opportunities and foster a sustainable, inclusive, and economically vibrant future for its residents.

CONSIDERATIONS FOR HENDERSONVILLE

The following is a summary of issues and observations for consideration:

Community Character

- Preserving small-town character while being a 21st century city
- The population mixes traditional values with a diversity of cultures and lifestyles
- A walkable downtown connected to the world by auto-oriented corridors
- It is a focus of activity in a sea of farm and forestland
- Developing stronger cross-jurisdictional collaboration
- A desirable, growing destination as well as a cherished hometown

Land Use & Development

- Catalyzing commercial and mixed use redevelopment and creating more attractive gateways
- Managing emerging issues
- Preparing for build-out

Housing

- Hendersonville is experiencing unprecedented growth and this is putting strain on the housing supply. Increasing the supply of affordable housing is paramount

Open Space

- Quality of life and access to the outdoors is important to Hendersonville residents
- Developing more parks and recreational opportunities to support a healthy population

Infrastructure

- Improving the framework for providing water and sewer service is crucial to efficiency and quality of service to residents

- Making needed transportation improvements is necessary to serve the existing and future population

Sustainable & Resilient Future

- Promoting sustainability and advancing sustainable solutions for emerging and existing issues

Aging Population

- A third of Hendersonville's population is 65+
- Making the community more age-friendly is key to supporting the needs of all residents



A pristine reservoir in nearby Pisgah National Forest supplies drinking water to Hendersonville and Henderson County residents and businesses | City of Hendersonville

Big Ideas for Hendersonville's Future

Eight big ideas have been developed based on what the community suggested as changes to enhance the quality of life in Hendersonville.

The big ideas encompass features that define the larger planning area and the aspects of the community that residents have enjoyed for decades.

Transform Gateways & Corridors
Direct new development to aging commercial corridors to remake them as vibrant, walkable mixed-use centers.

Connect People to the Great Outdoors
Work to distribute parks and greenways throughout the community and connect them to a linked network of green space.

Catalyze Small Business and Innovation
Support creative spaces and provide small-business assistance to help the next generation of creative businesses develop and thrive.

Leverage Partnerships to Protect Apple Country
Collaborate with Henderson County and rural farmers to protect the working landscape of farms, forests, and orchards, and guide growth to areas with suitable infrastructure.

Energize Multi-Pronged Approach to Affordable and Accessible Housing
Implement key recommendations from the forthcoming Affordable Housing Strategic Plan to create a multi-pronged approach to providing more housing options.

Strengthen Community Placemaking
Catalyze neighborhood-guided investment to strengthen the area around 7th Avenue, downtown, and other locations through authentic placemaking, targeted infrastructure improvements, and resident retention strategies.

Protect and Restore Natural Systems
Enlarge the tree canopy and enhance natural systems by relocating vulnerable buildings out of the floodplain, restoring streambanks and natural areas, and planting native vegetation.



Community stakeholders provide input and ideas for the Gen H Plan | City of Hendersonville