



**NASHVILLE
DOWNTOWN
PARTNERSHIP**

2014 Annual Report

Celebrating 20 Years
of Transforming Downtown





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NASHVILLE DOWNTOWN PARTNERSHIP

2014 BOARD OF DIRECTORS

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Nashville Electric Service

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Christ Church Cathedral

DR. FRANK LEWIS
First Baptist Nashville

ZACH LIFF
DZL Management

LIBBY FUNKE LUFF
Nossi College of Art

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Ex Officio
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Pinnacle Financial Partners

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McNeely Pigott & Fox
Public Relations

DEBORAH MERRELL
SunTrust Bank

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Ex Officio
Nashville Public Library

DAN PIOTROWSKI
Omni Nashville Hotel

STEPHEN H. PRICE
Stites & Harbison PLLC

HUGH M. QUEENER
CBID Secretary-Treasurer
Pinnacle Financial Partners

BRACKNEY J. REED
Gresham, Smith & Partners

RONALD ROBERTS
DVL Public Relations & Advertising

CHARLES ROBIN
Robin Realty Co., LLC

BRENDA SANDERSON
CBID Vice Chairman
Chair, Public Space Management
The STAGE, Legends Corner and
Second Fiddle

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Ex Officio
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JRS Investments Incorporated

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The Hermitage Hotel

BUTCH SPYRIDON
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Nashville Convention
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Saint Thomas Midtown Hospital

TONY K. THOMPSON
First Tennessee Bank

ROBERT TOY
SP Plus

JAMES S. TURNER, JR.
MarketStreet Enterprises

THE HONORABLE MIKE TURNER
Ex Officio
State Representative, District 51

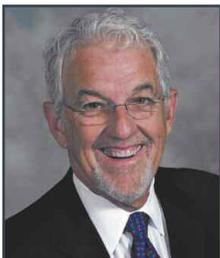
TOM TURNER
Ex Officio
Nashville Downtown Partnership

ALAN VALENTINE
The Nashville Symphony

SALLY WILLIAMS
Ryman Auditorium

MATT WILTSHIRE
Ex Officio
Mayor's Office of Economic
and Community Development

SHIRLEY ZEITLIN
Zeitlin & Company, Realtors



CELEBRATING 20 YEARS AND MOVING FORWARD

The Nashville Downtown Partnership's First 20 Years

Since 1994, the Nashville Downtown Partnership has focused on keeping downtown clean, safe and attractive. On making it easy to get into and around downtown. On spreading the word about downtown. On residential and retail development. On job growth. On everything downtown.

Downtown Nashville has evolved—and the Partnership has been here for every step of two decades of its

remarkable growth and success. Working on behalf of everyone involved with downtown. Quietly. Strategically. Successfully.

And over the past 20 years, our core purpose has remained steadfast: “To make downtown Nashville the compelling urban center in the Southeast in which to LIVE, WORK, PLAY and INVEST.”



Today's Nashville Downtown Partnership

The Nashville Downtown Partnership is the go-to resource that gets things done for anyone with a downtown connection: current and prospective employers, employees, residents, property owners and developers.

Because we serve such a diverse group, we are multifaceted in our approach and both creative and pragmatic in our solutions.

Totally and solely focused on enhancing the downtown experience, the Partnership works in many ways—from Clean and Safe Programs, to Economic Development, Marketing and Parking Options—so that all can prosper in and enjoy the most compelling urban center in the Southeast: Nashville's downtown.

The Nashville Downtown Partnership Moving Forward



**NASHVILLE
DOWNTOWN
PARTNERSHIP**

LIVE. WORK. PLAY. INVEST.

Celebrating 20 years of working on behalf of a prosperous downtown.

Over the past 20 years, we have transitioned into a leadership organization. We foresee continuing that leadership with innovative programs aimed to improve the downtown experience.

We will continue working closely with downtown companies, developers and residents as well as Metro officials. Nashville will only continue to evolve as a city, and the Partnership will be right there alongside it.

With our 20th anniversary, the “brand” that is the Nashville Downtown Partnership has already evolved with a new contemporary look reflecting the remarkable changes that have taken place in Nashville.

Moving into our third decade, the Nashville Downtown Partnership is ready for more—and confident in downtown Nashville's future as “the compelling urban center in the Southeast in which to LIVE, WORK, PLAY and INVEST.”

– **Thomas D. Turner**, *President and CEO*

LOW VACANCY AND HIGH DEMAND OUTPACE NEW DOWNTOWN RESIDENTIAL PRODUCT

KIRBY DAVIS, Chair, Residential Development



- Downtown is a sellers' market with 255 closings in 2013, an average of 21 per month and the highest number sold since 2008. Only about 49 re-sale units (a 2-month supply) are on the market. The average square foot condo prices in four downtown high-rise properties are all above \$300 and 30% higher than in 2010.

- Developers of the residential tower Twelve Twelve in The Gulch announced in early 2014 that its 286 units would transition from apartments to condos, with strong early sales and move-ins beginning in October 2014. Twelve Twelve is downtown's first high-rise condo tower built since the Great Recession.

- Rental demand continues very strong, with a 98% occupancy rate downtown since 2012. The highest rental demand is for the smallest units, which also have the highest rents (e.g., \$2.88 per square foot rental rate for a 419 square foot apartment).

- With the recent addition of new rental inventory, the downtown housing mix is more balanced, with 49% rental (2,232 apartment units), 46% condos (2,097 units) and 5% single-family homes (209 homes). Overall, 92% of the downtown housing inventory is market rate and 8% affordable housing.

- Currently under construction are 936 rental units at 7 sites, with another 1,747 more being planned. If all planned apartments are built, downtown Nashville will have about 12,000 residents.

- A 2012 market analysis indicated that downtown can absorb an additional 700 residential units per year through 2017. To meet the Brookings Institution's recommendation for 2% of a metropolitan area's population living within its urban core, Nashville will need an additional 15,000 units.

- To continue its residential momentum, downtown Nashville needs additional housing inventory designed to attract Millennials and Baby Boomers. Their preferences include smaller sized units with more affordable pricing and versatile transportation options.

NEW RETAILERS CHOOSE DOWNTOWN

JENNIFER COLE, Chair, Retail Development



- A total of 40 new retail businesses opened or announced between January 1 and September 30, 2014. The total number of downtown retail openings in 2013 was 48. The more than 400 downtown retail spaces are 91% occupied.

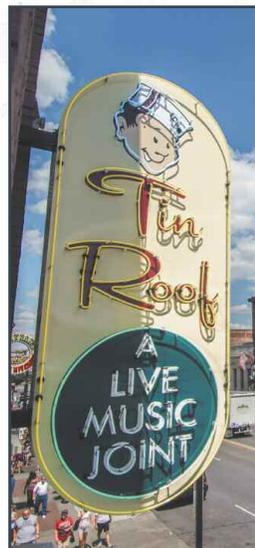
- Current trends indicate that retailers prefer street-oriented locations. Since 2008, implementation of the downtown retail strategy has focused on developing vibrant retail clusters in target areas led by retail magnets. Examples of successful magnets include Puckett's Gro. & Restaurant, Urban Outfitters and the M Street restaurants. Recent retail clusters with shops and restaurants enlivening the sidewalks include the 5th Avenue South grouping at Omni Nashville Hotel as well as at Pine Street Flats in The Gulch.



- New retailers this year include Ann Taylor Loft, Moto, Adele's, Barre 3 and Czann's in The Gulch and from 6th Avenue North to SoBro, Frothy Monkey, Acme Feed & Seed, Tin Roof, Rodney Mitchell Style Bar and Salon and GooGoo Clusters, and others opening soon.



- The Nashville food scene continues to get favorable press regionally and nationally. The Partnership's retail strategy recommends unique, eclectic restaurants with appeal to an urban population. GQ named Husk as 6th on their list of the 12 most outstanding restaurants of 2014. Both Prime 108 and Capitol Grille have 4-star ratings from *Forbes Travel Guide* and Prima (opening soon at Terrazzo) was on Zagat's "25 most anticipated openings of 2014."



- Major new downtown retail space will come online with additional development such as the two new office buildings in The Gulch, the Capitol View mixed-use urban project and the repurposed Nashville Convention Center.

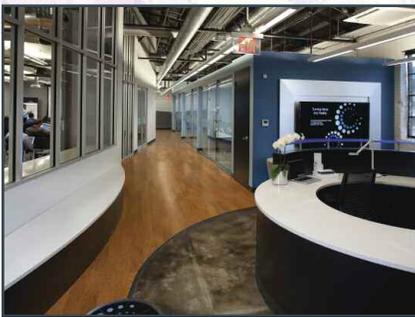
- Downtown Nashville now has over 131 shopping options, 211 dining options, 87 nightlife venues and 26 galleries—with more to come!



DOWNTOWN OFFICE TOWERS OFFER SPACE FOR BUSINESS GROWTH

WILLIAM HASTINGS, Chair, Business Development

Photo ©Warne Riker



• The mid-year 2014 downtown Class A office vacancy was 5.3% and all 21st century office buildings have limited vacancy. At mid-year 2013, Class A vacancy was 7.7%.

• Over the past 5 years, many new employers have relocated downtown where they continue to expand and hire new employees. **UBS Nashville Business Solutions Center** will add 1,200 downtown jobs by the end of 2015 in the renovated and renamed UBS Tower at 318 Deaderick. **ServiceSource, Qualifacts** and **Asurion** are among the key companies continuing their downtown expansion.

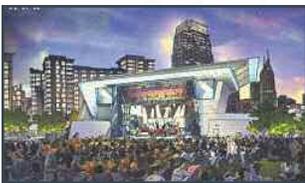
• Strong investor interest in downtown office towers continues, with ownership changes the past six years for all except 333 Commerce Street and SunTrust Plaza. Completed in 2010, The Pinnacle at Symphony Place is a LEED Gold certified 29-story, 520,241 SF multitenant tower bringing a local record \$152 million purchase price in September, 2013. In just one year, this Highwoods Properties tower has gone from 84.9% occupancy to 98%.

• Additional Class A inventory now being developed includes **Gulch Crossing** (205,000 SF office) which will be completed in mid-2015 and **1201 Demonbreun** (275,000 SF office) by the end of 2016.

• HCA is developing headquarters office buildings for its **Parallon** and **Sarah Cannon** divisions (total of 2,500 employees) at Capitol View (Charlotte Avenue at 11th Avenue North), to be completed by fall, 2016.

• The Partnership's 5th annual **Downtown Employee Appreciation Week** in late August featured popular events including the highly competitive Corporate Tug of War. Promoting physical fitness were the Walk with the Mayor and Party on the Plaza with the Nashville Predators and Nashville B-cycle. An estimated 55,000 people work downtown, up 23% since 2004.

BIGGER CROWDS AND MORE PLACES TO PLAY DOWNTOWN



- The 43rd annual CMA Music Festival brought a record \$39.3 million in direct spending to the local economy — 26% more than in 2013. About half of the 80,000 festival-goers were first-time attendees—coming from all 50 states and 20 countries for the 4-day June events. Each year since 2010, the CMA Music Festival has sold out LP Field for its nightly concerts. The 2014 festival sold out 6 months in advance—and before it ended, the 2015 festival was already 75% sold.

- Live on the Green, a free annual concert series at Public Square Park, is produced and presented by Lightning 100. In 2014, they added a 3-day festival following three weekly concerts and expanded the festival site. The 2014 attendance was 108,000—a new record (up from 72,000 in 2013).

- First Tennessee Park, the new ballpark for the Nashville Sounds, is scheduled to open in April, 2015. The low profile two-story structure features a ceremonial entrance at Jackson Street, and a 1,000-space parking facility is part of the development. The ballpark will be used for 72 games annually plus 20 to 25 other events.

- Also opening in 2015 is the West Riverfront Park, an 11-acre civic open space which includes greenway trails, a dog park and an event lawn with an amphitheater. When events aren't scheduled, the area can be used for soccer games and other sporting events. The 2-level, 35,000 SF amphitheater has semi-fixed seating for 2,200 (with additional capacity for 4,300 on the greenway pavilion and lawn). With its outstanding acoustics, designers project this new facility will be the best U.S. outdoor venue for pop concerts. Great new setting for July 4 fireworks, Nashville Symphony concerts and CMA Music Festival events.

- The iconic Ryman Auditorium is Pollstar Theatre of the Year as well as International Entertainment Buyers Association Venue of the Year. Underway is a \$14 million expansion including renovations of box office and retail areas and the addition of a multimedia history tour, a café and a brick-and-glass structure extending to Fourth Avenue.

GETTING AROUND AND PARKING DOWNTOWN ARE GETTING EASIER

BECKY HARRELL, Chair, Access and Transportation



- A successful LP Field park and ride program managed by the Nashville Downtown Partnership offers registered downtown employees free weekday parking in designated LP Field lots. The Partnership provides optional cost-effective shuttle service to downtown office buildings. For more information, see parkitdowntown.com.

- Currently the Partnership utilizes 18 shuttles on four routes for employees. In January, a shuttle route was added to accommodate State employees displaced from parking lots during construction of the new ballpark.

- During the first 8 months of 2014, over 8,000 monthly passes were sold. With monthly shuttle passes only \$30, employees can save at least \$100 per month on parking expenses.

- The Nashville Downtown Partnership team works with prospective downtown tenants to secure adequate parking options for their employees. The park and ride initiative frees up about 1,300 downtown spaces per month—more than one full parking garage.

- MDHA is planning construction of a parking facility with close to 1,000 spaces at Church and 5th Avenue North. This facility will relieve the imbalance of parking inventory in the downtown core.

- BEEP (Best Ever Event Parking) is a park and ride option for Bridgestone Arena events operated by the Partnership since March, 2010. BEEP provides free parking at LP Field Lot R with optional round trip shuttle service for only \$3 per person. Over 52,000 vehicles have used this free parking for more than 400 events, with 63% of the 98,777 passengers choosing the shuttle option.

- For the past four years, the Partnership has made another downtown transportation option available, with four vehicles from Enterprise CarShare strategically located for short-term use. About 150 members (including businesses, employees and residents) participate in this cost-effective program. For more information, see enterprisecarshare.com.





- In December, 2012, a local fee-based bike-share system, Nashville B-cycle, was launched by Metro Health Department and the Nashville Downtown Partnership. Start-up costs were funded through a Communities Putting Prevention to Work grant from the Centers for Disease Control.

- Nashville B-cycle, managed by the Nashville Downtown Partnership, currently has 25 automated kiosks and 225 bikes available in urban neighborhoods. Designed for short trips under one hour, the bikes are available with the purchase of memberships (24-hour, annual, monthly or weekly).

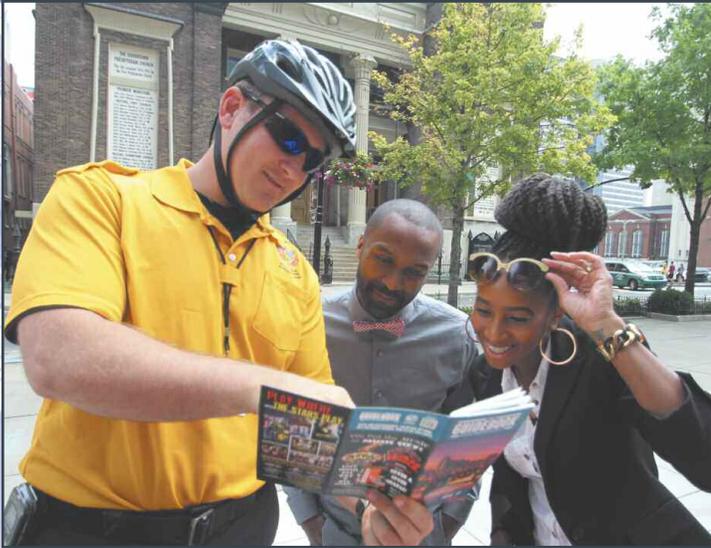
- As of September 30, 24,222 YTD Nashville B-cycle memberships have been purchased, including 23,548 daily and 358 annual memberships—a 19% increase since 2013. During the past 9 months, there have been a total of 43,770 trips or bike checkouts, 7,725,491 calories have been burned and 183,480 pounds of carbon offset.

- The YMCA of Middle Tennessee stepped up in May 2013 to sponsor a Nashville B-cycle kiosk near their downtown facility. So far this year, three new sponsored kiosks have opened—Saint Thomas Midtown, Lentz Public Health Center and McCabe Park Community Center—and two others are planned. Sponsor logos are prominently displayed on the bikes and/or kiosks. For more information, see Nashville.Bcycle.com.



BUSY DOWNTOWN TEAMS OFFER VITAL SERVICES

BRENDA SANDERSON, Chair, Public Space Committee



- The downtown clean and safe teams provide a wide range of services to two Business Improvement Districts—one in the central urban area (CBID) and one in The Gulch (GBID). This combined service area covers approximately 463 acres.

- During the first nine months of 2014, the cleaning staff removed over 96,000 pounds of trash, 11,418 square feet of graffiti and power washed 1,125 block faces and 1,995 alleys in the urban core district. With the increased incidence of graffiti, the cleaning team responds quickly to assist property owners affected. This prompt removal helps prevent recurrences.

- The cleaning team works throughout the CBID and GBID from 7 a.m. to 3:30 p.m. seven days a week. Safety Ambassadors patrol the CBID from 7 a.m. to 11 p.m. seven days a week and are in the GBID four nights weekly from 5 p.m. to 11 p.m. Four evenings each week from 4 p.m. to 11 p.m. two team members focus on pressure washing in areas not easily accessed during business hours.

- Safety Ambassadors also rotate through assignments as Hospitality Ambassadors. Wearing shirts marked with the universal symbol for information, they are especially busy during major downtown events and conventions. As they interact with visitors, the Hospitality Ambassadors distribute guidebooks and maps and print out requested directions and coupons to enhance their downtown experience. Their hand-held Eponics devices include a searchable database of downtown businesses and printable walking directions. Already this year, they have distributed over 10,000 visitor information printouts.

- An ongoing special project for the cleaning team involves mowing as well as litter and weed removal along major downtown access points at highway interchanges. They also enhance downtown's overall appearance with their periodic cleaning and repainting of junction boxes, light poles, trash receptacles and tree grates.





- These teams also coordinate the seasonal flower baskets on streetlights throughout downtown from May until October. A record 650 baskets were in place this year. Additional landscaping projects are maintained in medians and planters along Union Street and 1st Avenue.

- Safety Ambassadors (including those assigned as Hospitality Ambassadors) monitor downtown streets and sidewalks. From January through September, they logged 3,434 miles on Segways.

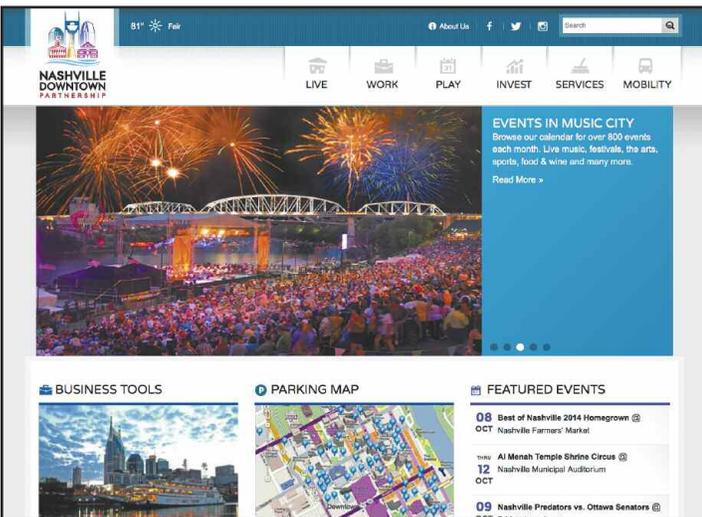
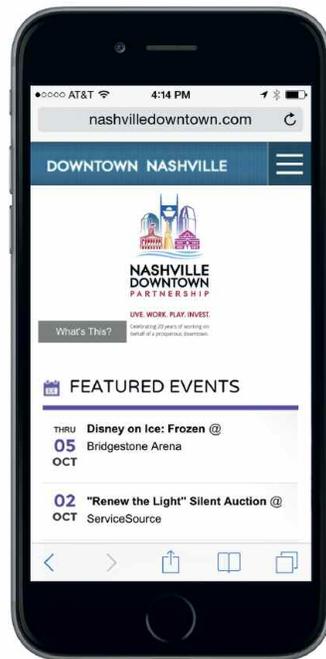
- A successful program initiated in June, 2008, Homeward Bound offers bus tickets to eligible individuals without other resources. Eligibility is based on confirmation of favorable job prospects, benefits or proximity to family. As of September 1, 2014, a total of 631 individuals have received this relocation assistance. While in Nashville, the 631 individuals accounted for 5,166 arrests.

- Since July, 2011, a fulltime Social Services Outreach Coordinator has focused on connecting service-resistant individuals with high numbers of downtown arrests to needed services (e.g., drug and alcohol treatment programs, mental health services). This housing first model used has proved successful, with 34 clients placed in transitional housing with supportive services. Of those successfully housed, 16 have already moved into permanent housing with outside sources of support, 7 others are currently in transitional housing with services and 1 is in rehab. Based on prior activity, 1,486 arrests have been avoided utilizing this housing first model.



STAYING IN TOUCH WITH DOWNTOWN NASHVILLE

downtown details
The downtown Nashville news and information source



- Social media options reach an immediate audience with interesting and timely downtown news. The Nashville Downtown Partnership currently has about 42,000 fans on Facebook, a 35% increase since August, 2013. The Partnership's multiple Twitter accounts reach over 56,000 followers, a 95% increase since August, 2013.



- The Nashville Downtown Partnership's social media statistics consistently outpace those of comparable organizations in other cities such as Orlando, Denver, Philadelphia, Memphis, Atlanta, Austin, Charlotte and Indianapolis. The Partnership's Facebook numbers also exceed those of many top local print and radio media outlets.

- To mark the 20th anniversary of the Nashville Downtown Partnership, a 20-day social media promotion on Facebook, Twitter and Instagram highlighted a year-by-year look at the transformation of downtown Nashville.

- Published twice each year, about 70,000 copies of The Guidebook are distributed to hotels, restaurants, business and residential locations. The 2014 editions have a sleek new full-color design that fits into brochure racks and includes a fold-out map of downtown. This comprehensive listing of downtown options in 38 categories is also maintained online at nashvilledowntown.com.

- Nashvilledowntown.com and parkitdowntown.com are responsive; the website being viewed automatically fits onto the screen of your phone, tablet or computer. This functionality allows users to access all of the information on both websites.



INVESTORS ADD \$1.4 MILLION FOR DOWNTOWN INITIATIVES SINCE 2006

ROBERT A. MCCABE, JR., Chair, Resource Development Committee

- Each year, Board members and the broader business community partner with us to ensure a prosperous downtown. Since 2006, 86 corporate investors have committed \$1,400,000 to implement a variety of key initiatives of the Nashville Downtown Partnership.
- This number of investors grows each year, with six new partners added in 2014.
- Most investors continue participating annually because they believe having a strong downtown economy is critically important to the economic health of the entire region and they value the Partnership's advocacy for downtown businesses and residents. Also, 58% of the 2014 investors are represented on the Partnership's Board of Directors, investing their time and talents for the good of downtown Nashville.
- Annual corporate investments have supported a comprehensive downtown retail strategy, downtown street beautification and landscaping projects, upgrades to the Downtown Development Center, the enhancement of user-friendly interactive websites and the expansion of a successful street outreach initiative.
- Other Partnership investment opportunities include annual membership dues, downtown home tour sponsorships, annual meeting sponsorships and guidebook advertising. From this menu of options, investors choose one or more categories that best complement their business goals.

CORPORATE INVESTORS 2006 – SEPTEMBER, 2014

Ajax Turner Co., Inc.
 American Constructors, Inc.
 Amstar Group
AT&T
Avenue Bank
Baker, Donelson, Bearman, Caldwell & Berkowitz, PC
The Bank of Nashville
Bass, Berry & Sims PLC
BDO USA, LLP
 Beaman Automotive Group
Boyle Investments Nashville/ Capitol View
 Bridgestone Americas Holding, Inc.
Brasfield & Gorrie
 Bristol Development
Brookside Properties
CapStar Bank
Caterpillar Financial Products Division
CCA of Tennessee, LLC
SP Plus
Colliers International/Nashville
 Core Development Services, LLC
Corner Partnership, LLC
 Crosland, LLC
 CVS Caremark Corporation
Fred Detwiler
DZL Management Co., LLC
 Eakin Partners
 Earl Swensson Associates
Enterprise Holdings Foundation
Fifth Third Bank

First Tennessee Foundation
 FirstBank
Frazier & Deeter, P.C.
Freeman Webb Companies
Genesco
Giarratana Nashville, LLC
Gobbell Hays Partners
Gresham, Smith and Partners
Gullett, Sanford, Robinson & Martin, PLLC
Harwell Howard Hyne Gabbert & Manner, PC
 HCA/TriStar Health
The Hermitage Hotel
Ingram Industries, Inc.
KPMG LLP
KraftCPAs, PLLC
 Lewis, King, Krieg & Waldrop, P.C.
M Street
MarketStreet Enterprises
 Martha and Bronson Ingram Foundation
 The Memorial Foundation
 Metro Development & Housing Agency
 Music City Suites, LLC
Nashville Electric Service
 Nashville Pinnacle, LLC
Nashville Predators
Neal & Harwell, PLC
Nissan North America
 O'Charley's Inc.
Parallon Business Services
 Piedmont Natural Gas

Pinnacle Financial Partners
Premier Parking
Regions Bank
Ryan
Sarah Cannon
Sherrard & Roe, PLC
SMS Holdings
 SSC Service Corporation
Saint Thomas Health
 Sprintz Furniture
The Stage on Broadway, Inc. and Legends Corner, Inc.
Stites & Harbison, PLLC
Strategic Hospitality, LLC
SunTrust Foundation
Tennessee Titans
Tower Investments, LLC
 Tuck-Hinton Architects
U.S. Bank
Vanderbilt University
 Vanderbilt University Medical Center
 Village Real Estate Services
Walker Tipps & Malone
Waller
Ted Welch Investments
 Wildhorse Saloon
XMi Commercial Real Estate
Zeitlin and Company, Realtors

Bold type indicates 2014 YTD investors

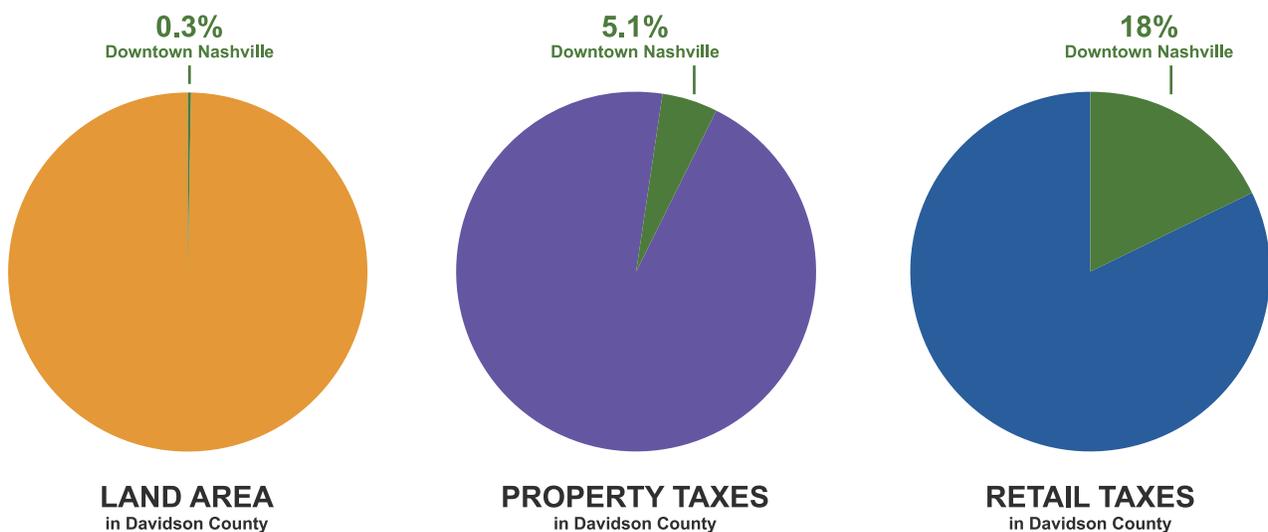


INVEST

WHY DOWNTOWN INVESTMENTS MATTER

- Since 2000, over \$4 billion in public and private investments have made downtown Nashville a dynamic and thriving urban center. Another \$3 billion in potential downtown investments is planned.
- Downtown Nashville is an economic engine. With only 0.3% of the land area in Davidson County, downtown generates 5.1% of Nashville-Davidson County's total property taxes and 18% of the county's total retail taxes.
- Local and out-of-state investors continue adding downtown office buildings to their portfolios and three new Class A commercial towers are under construction—Gulch Crossing, 1201 Demonbreun and the Capitol View headquarters for HCA subsidiaries Parallon and Sarah Cannon.
- Office investment sales and new commercial development, combined with long-term leases and a diversified mix of tenants with a younger and growing workforce add stability to the downtown market.
- By the end of 2014, the downtown hotel room inventory will be 4,486, a 45% increase since 2012. If all planned downtown hotels are built, there will be 7,690 rooms (149% more than in 2012).
- Development continues strong in all segments of downtown. Capitol View is a large-scale mixed-use development being planned by Boyle-Northwestern Mutual at Charlotte Avenue and 11th Avenue North. As developed over the next decade, Capitol View is expected to include 1 million SF of office space, 300,000 SF of retail, restaurant and grocery space, 1,000 multi-family units, two hotels and an urban park/event space.

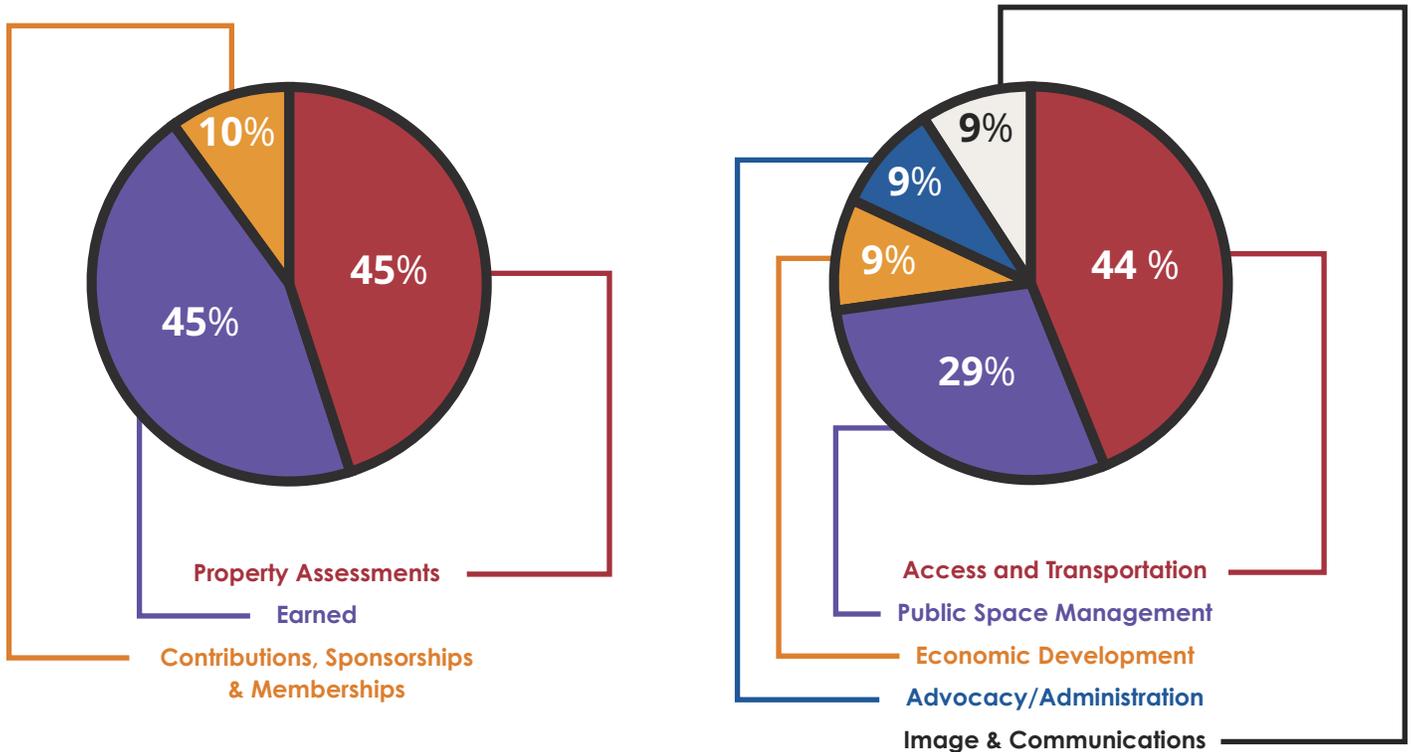
Land Area and Tax Revenue, Nashville–Davidson County



source: Urban3, Joseph Minicotti, AICP



NASHVILLE DOWNTOWN PARTNERSHIP 2014 RESOURCE ALLOCATION



1201 DEMONBREUN



GULCH CROSSING



PARALLON



INVEST



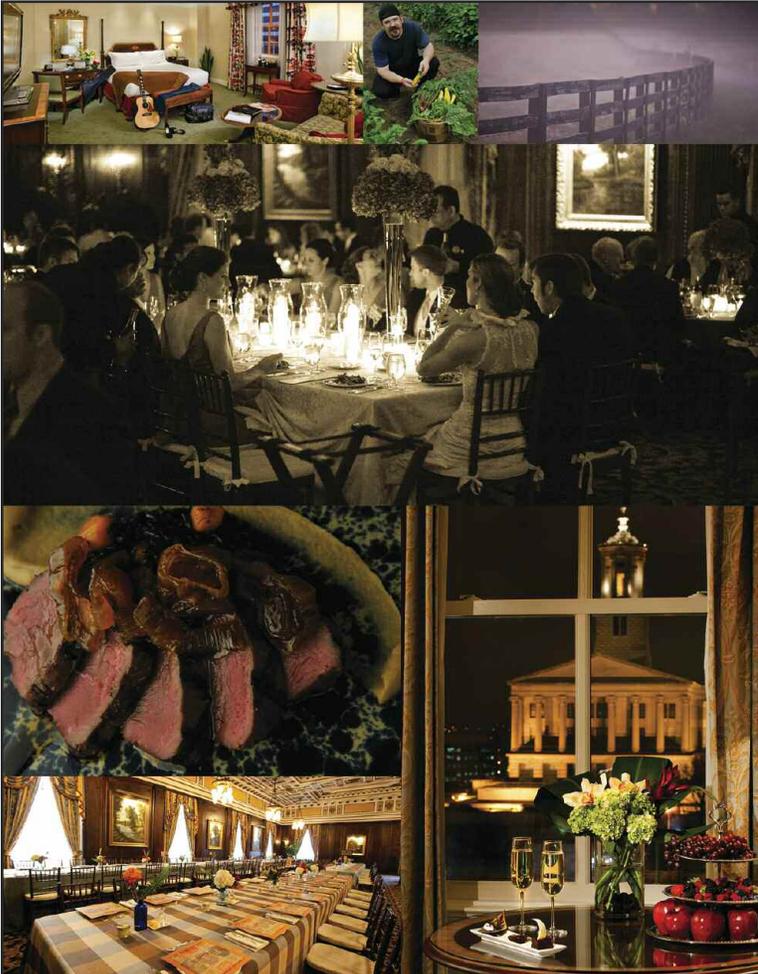
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Celebrating



*Years of
Transforming
Downtown!*

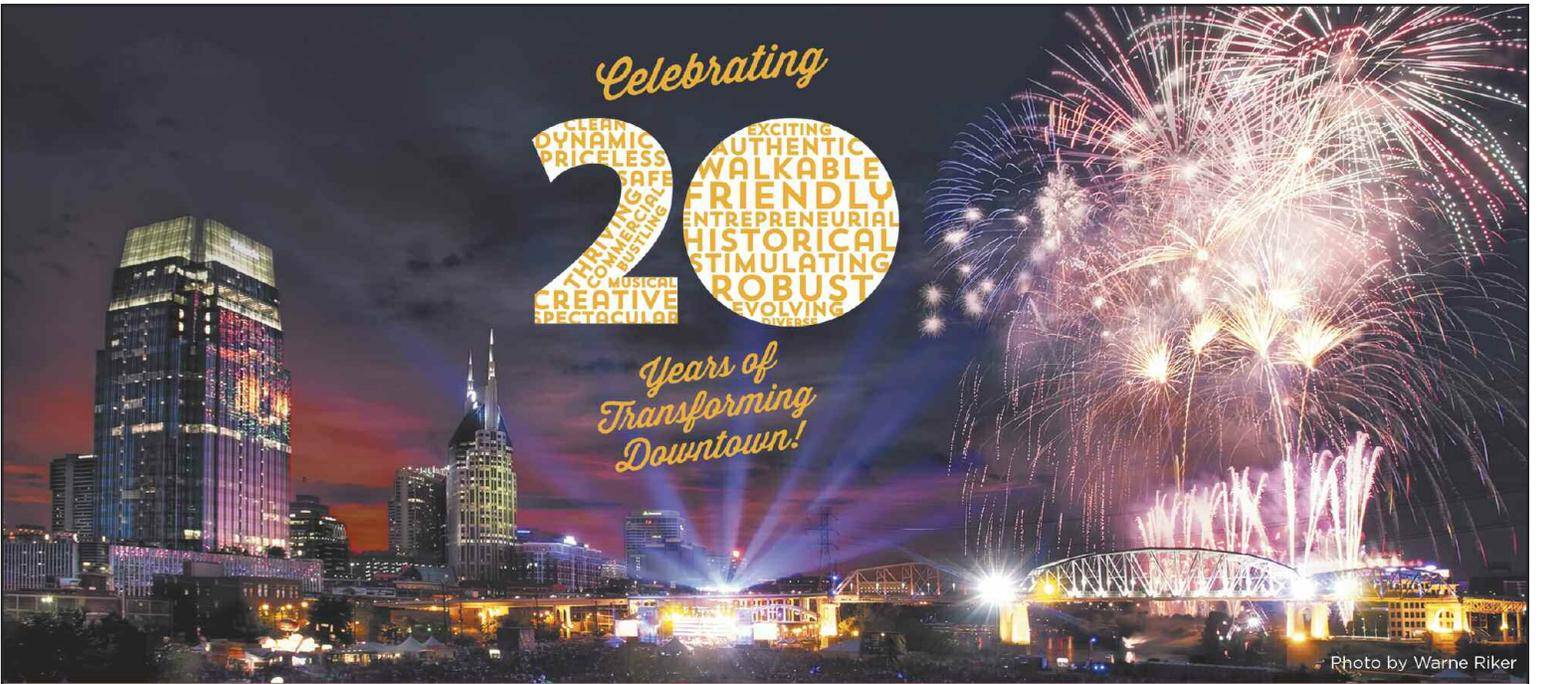


Photo by Warne Riker

1994

- Grand re-opening of the Ryman Auditorium
- Grand opening of the iconic AT&T building
- Nashville Downtown Partnership begins

2014

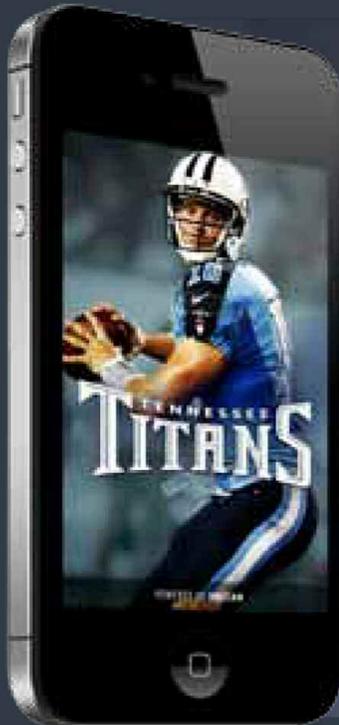
All three are going strong—and downtown Nashville is well on its way to becoming “the compelling urban center in the Southeast in which to LIVE, WORK, PLAY and INVEST.”

NASHVILLE DOWNTOWN PARTNERSHIP

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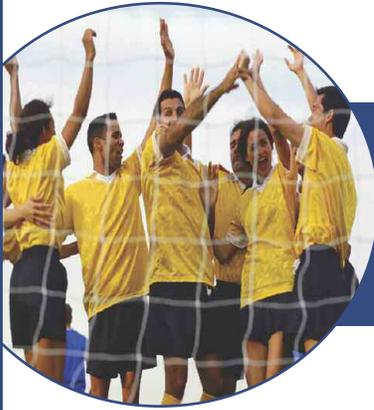
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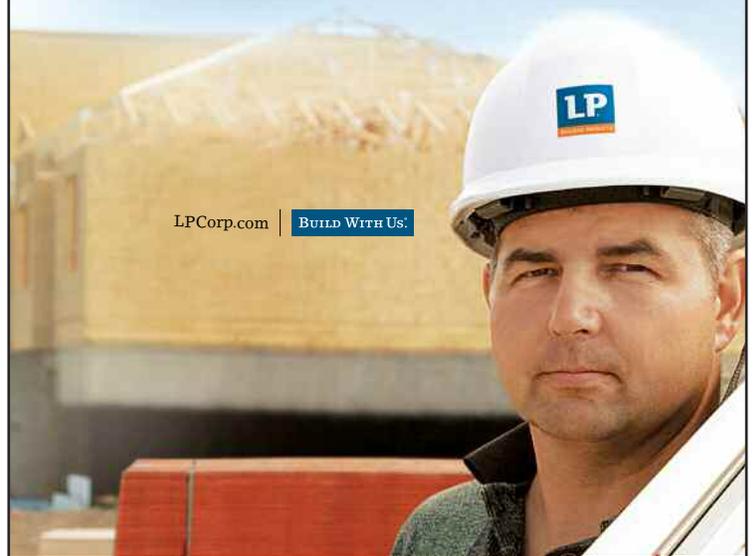
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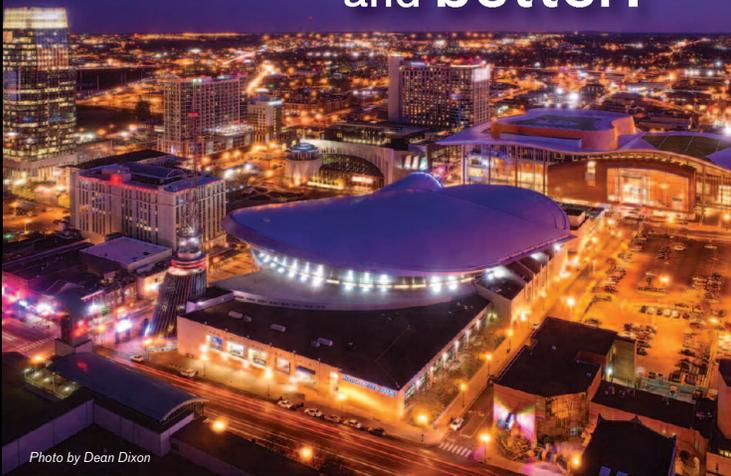


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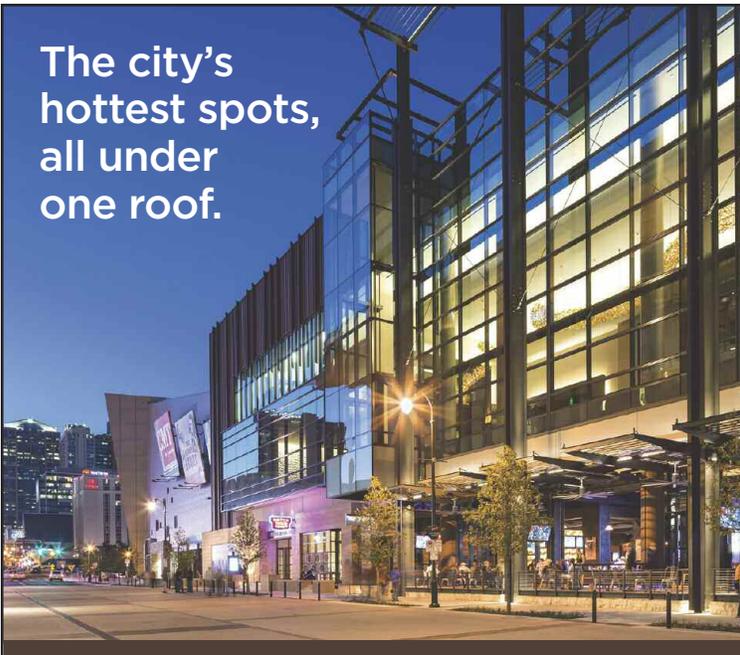


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