



# HOUSING MARKET ANALYSIS

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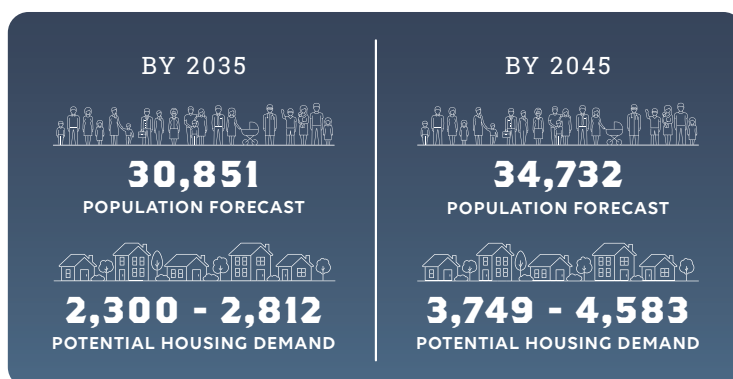
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# HOUSING MARKET ANALYSIS

## LAUDERDALE COUNTY, TN

### EXECUTIVE SUMMARY

The West TN Planning Population Forecast for Lauderdale County projects that the county population will increase from 24,793 to 30,851 by 2035 and to 34,732 by 2045. This translates into potential demand for 2,300 to 2,812 housing units by 2035, and between 3,749 to 4,583 units by 2045.



The range of projected housing unit demand is derived from the average number of people per household. Currently, Lauderdale County has a relatively low average household size when compared to the rest of the BlueOval City (BOC) impact region. As BOC and other new economic growth attract more working-age families with children, it is projected that the average household size will increase.

Many Lauderdale County residents are currently commuting to jobs in surrounding counties. With three Tennessee certified sites and its proximity to BOC, Lauderdale County is poised to attract tier 2 and 3 industrial manufacturing suppliers as well as other employers, thereby creating more jobs in the local economy. This anticipated growth is factored into the housing demand forecast.

The average income of households in Lauderdale County will support a range of home values and rents. Homes ranging in price from \$120,205 to \$490,048 will be needed to match the household incomes in the county. Rental rates ranging from \$1,124 per month to \$3,165 per month can be supported by the range of household incomes.



There is no excess capacity in the availability of single-family or multi-family housing in Lauderdale County. There are very few houses listed for sale and the few multi-family units are at full occupancy. Essentially, all of the forecasted demand will have to be met with new construction.

The number of housing starts and housing sales in Lauderdale County has been low for decades. This is a reflection of years of decline in the population of Lauderdale County prior to the announcement of BOC, as well as national housing market trends.

Currently, a total of 132 single-family units make up the residential housing projects that have reached the approved/construction stage; 112 of these units are located in Ripley, and the other 20 in Halls. It is difficult to estimate how many from the pipeline of projects currently under consideration will reach the approval and construction stage. A more coordinated approach to attracting new developments and tracking them to fruition could be beneficial in meeting the projected housing demand.



A mathematical analysis finds that there is capacity to develop approximately 4,670 housing units within the county's four Urban Growth Boundaries (UGBs) in Gates, Halls, Henning and Ripley. This analysis was based on existing land use and residential patterns in the municipalities and the county. Maps illustrating this potential capacity are included in this report.

**THIS ANALYSIS FINDS THAT THERE IS SUFFICIENT DEVELOPABLE LAND TO MEET THE FORECASTED HOUSING DEMAND.**

It is recommended that, as much as possible, development be focused within town limits first, and then within the UGBs where water, sewer and other utilities already serve most of the area. In the related master plan engagement activities, the local utility providers for Ripley and Halls reported some excess capacity for power, water, wastewater and natural gas. They also reported on planned expansions meaning that substantial investments to increase utility capacity will still be needed.

Providing a mix of residential housing choices in town limits may help lower the immediate need for new public infrastructure and increase the speed of residential development to meet the rising demand for housing. Concentrating development also preserves agricultural land, desirable natural areas, and environmentally sensitive areas, which have been stated as community goals in the master plan engagement meetings.

One option to provide a better mix of choices and increase availability is large-scale (150+ units) market-rate apartment complexes, which have not been developed in Lauderdale County in the past. This type of multi-family rental housing, with amenities such as pools and play areas, is in demand. Of the 3,749 to 4,583 forecasted housing unit demand, 1,125 to 1,375 units could be met with multi-unit apartment complexes.

Infilling vacant parcels, redeveloping substandard housing and commercial development, and providing additional housing density can be accomplished without detrimental effects on the character of the communities. Public input from elected officials and key community stakeholders indicates a desire for this type of development to be considered to increase housing availability and stabilize housing prices.

There are a number of constraints to reaching the full potential for housing development in Lauderdale County:

- » Land for development is not readily available.
- » Development will require substantial investments in infrastructure in most of the county. The City of Ripley does have some current water, wastewater, and power capacity.
- » Road capacity is also inadequate in many areas to accommodate the increased population and commercial traffic.

Past experiences with crime and blight at older multi-family housing developments has created a degree of public resistance to new multi-family housing developments. However, developers of modern facilities with strong property management standards will find local leaders open to multi-family development plans.



## STUDY BACKGROUND

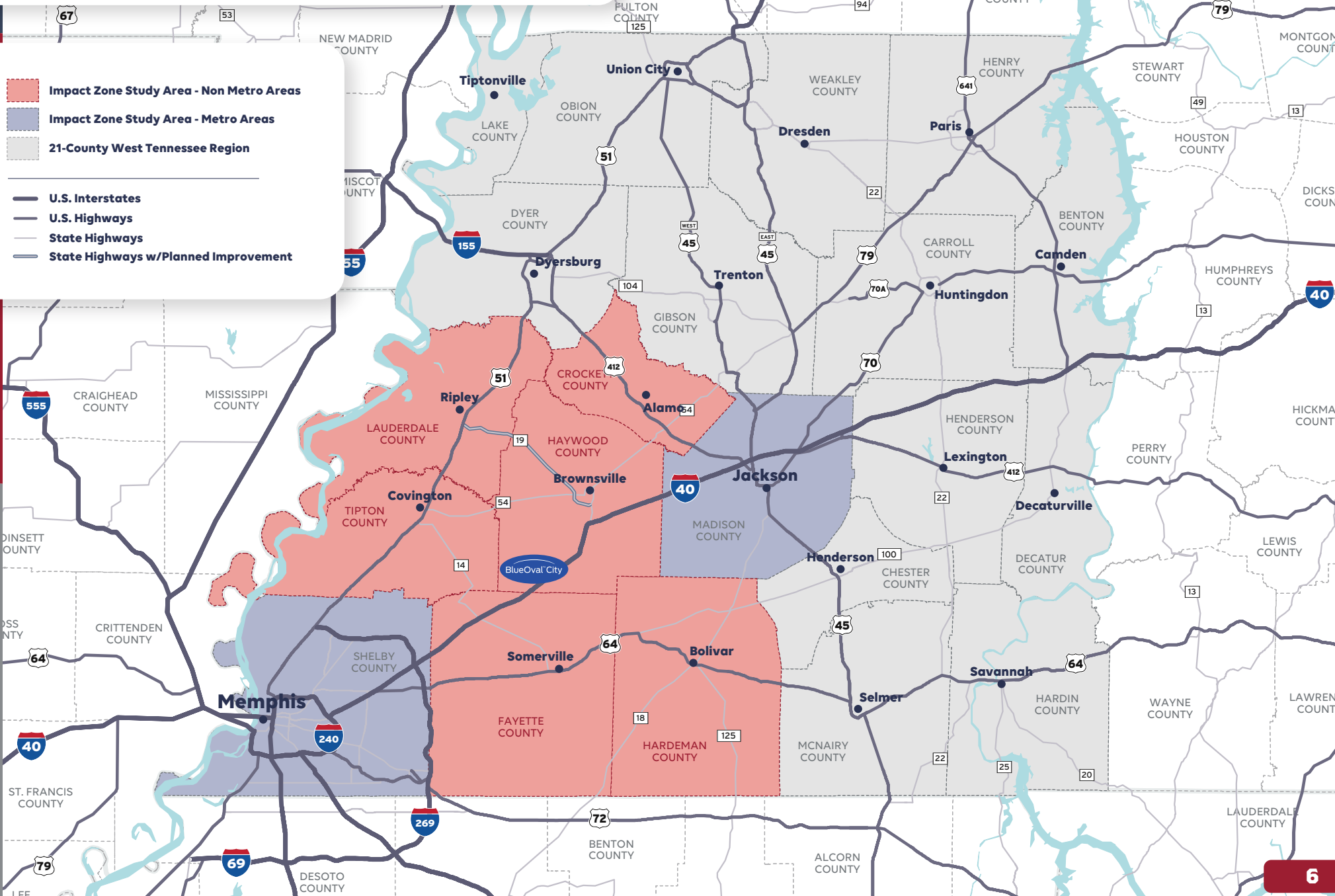
In late 2021, Governor Bill Lee announced that Ford Motor Company and SK Innovation selected the 3,600 acre Megasite in Haywood County for a vehicle assembly and battery manufacturing campus. This Ford Motor Company campus, known as BlueOval City (BOC), is expected to spur additional industrial, commercial, and residential development throughout West Tennessee.

As a result, many of the predominantly rural communities in the region face unprecedented growth and development. In response to this, Tennessee Department of Economic and Community Development (TNECD) is overseeing a five-year West Tennessee Planning effort to assist these communities as they prepare for the anticipated growth catalyzed by BlueOval City. The West TN Planning team is working with state, regional, and local agencies to understand the regional impact of all aspects of community development.

TNECD has identified eight significant impact counties within a 60-minute drive of BOC that will see the most immediate changes in the next ten years. This region will be referenced as the "Impact Zone" in this report. Map 1 on the next page depicts the 21-county West Tennessee Region and the Impact Zone.

West TN Planning has identified the need for a housing study specific to each of the 21 counties in the region to provide consistent baseline data, identify specific housing demand, and signal opportunity for investment. Eighteen housing market studies will be completed as part of this effort. A housing analysis was released in 2022 for Jackson-Madison County; Shelby County has recent and ongoing housing studies conducted by various groups; and Dyer County's housing market analysis, funded by the ThreeStar program, will be released this year. A regional housing overview will also be compiled for the Impact Zone, which will include findings from Lauderdale, Crockett, Tipton, Fayette, and Hardeman Counties as well as findings from Madison County (Jackson metro) and Shelby County (Memphis metro).

This report examines the potential demand for housing in Lauderdale County projected to be generated by BOC, and compares that demand to the existing housing market and to the capacity for new housing development based on general land use.



## POPULATION PROJECTIONS

TNECD's West TN Planning effort produced the *West TN Regional Assessment Forecasts for Population* in September 2023. That report anticipates a regional population increase of more than 109,500 individuals by 2035 and more than 176,300 by 2045.

Lauderdale County previously experienced many years of population decline. Prior to the announcement of BOC, the county population was projected to continue to decline through 2070. With declining population, there has been little demand for additional housing.

BOC and the multiplier effect it will create is expected to dramatically change the population trends and create unprecedented housing demand in West Tennessee, including Lauderdale County. At full production in 2026, Ford and SK have announced they plan to directly employ 5,760 workers. Economic impact analyses show that 19,621 total jobs will be created in West TN as a result of BOC operations.

Population growth was allocated to each county based on an algorithm of factors that influence where people choose to live. The factors that highly favor Lauderdale County as a residential location are commute time to work and potential for attracting other economic development projects. Additionally, Lauderdale County's proximity to the BlueOval campus makes it a desirable location for workers locating to the region for employment. **The West TN Planning population forecast for Lauderdale County has projected growth of approximately 10,000 people from 2022 to 2045 as shown below.**

**TABLE 1 | POPULATION PROJECTIONS**

County	2022 Estimate from Census Bureau	2025 Projection	2030 Projection	2035 Projection	2040 Projection	2045 Projection	Cumulative Change 2022-2045
Lauderdale	24,793	26,630	28,895	30,851	32,728	34,732	9,939

*Data Compiled: August 2023 – Based on BOC Operations and related or “downstream” growth  
Source: “West TN Regional Assessment Forecasts for Population,” Younger Associates*

This analysis identified a deficit of quality-of-life amenities such as retail, entertainment and personal services (with exceptions in the City of Ripley) as a negative factor in the population growth algorithm, though applied only to the early years of the population forecast period. Retail and personal services can follow population and housing growth, particularly if commercial development and public recreation are planned in conjunction with residential development.

The algorithm recognized the positive potential of the county's three certified industrial sites. These fully prepared sites provide an advantage in attracting BOC suppliers and other industrial growth that is likely to be spurred in the region. There is also an additional industrial site that will likely become a certified site in the future.

Lauderdale County does have a small amount of developable waterfront property. Lakefront property in the county is highly desirable to outdoors enthusiasts, but there are no large tracts available for development and it is rare for even a single site to reach the market. Sites near a golf course and other recreational facilities may also pose attractive development opportunities. Fort Pillow State Park and other recreational opportunities on the Mississippi River, the Lower Hatchie National Wildlife Refuge, and the Chickasaw National Wildlife Refuge may also be factors that could attract residential development nearby.



The Tennessee Department of Education reports a low rating for public K-12 education in the county. However, participants in public meetings for the Lauderdale County master plan reported satisfaction with the quality of education their children were receiving in the local public schools. Since education is such a key factor in residential location decisions, Lauderdale County should work to increase their education ratings and to publicize the positive attributes already in place, including the school capacity that exists today.

An additional factor contributing to housing growth is the construction of the new Lauderdale Community Hospital. The population forecast algorithm is summarized on page 9.

**TABLE 2 | POPULATION GROWTH ALGORITHM SUMMARY – 2022-2035**

Scoring Matrix	Criteria	Lauderdale Matrix Score
<b>LOCATION</b> Scale of 0-3 Score = 3x Rating	0 = 60+ minutes from site 1 = 35-59 minutes from site 2 = 21-34 minutes from site 3 = 20 minutes or less from site	6.0
<b>PROPENSITY TO ATTRACT BOC SUPPLIERS</b>	One Point for Each Certified Site	3.0
<b>ANNOUNCED JOBS</b> (excluding BOC) Scale 0-5	2021 - June 2023 0 = 0-99 1 = 100-299 2 = 300-599 3 = 600-999 4 = 1000-2000 5 = 2000+	0.0
<b>AVAILABLE HOUSING</b> Scale of 1 - 3	Based on: Number of homes listed on the market as of July 2023; Number of apartment units listed online as of July 2023; Building permits 2020 - June 2023; and Potential for multi-family development (years 35-45)	0.0
<b>QUALITY OF SCHOOLS</b> Scale 0-5	Based on: Average ACT, Percentage of Graduates moving to Post Secondary Education, Proficiency Rates for Math and Science for 3rd and 5th Grades	1.0
<b>AMENITIES</b> Scale -1 to 4	Retail Inleakage, Outleakage, and Unmet Demand for Potential Growth	-1.0
Scale 0-2	Primary Campus of Four-Year University	0.0
Scale 0-1	Developable Waterfront Property	1.0
<b>POPULATION TRENDS</b> State Projected Growth Trend Scale -2 to +3	-2 = Greater than -.4 -1 = -.4 to -.2 0 = -.2 to 0 1 = 0 to 1 2 = 1 to 2 3 = Greater than 2	-0.5
<b>MSA</b> Yes = 1	Meets MSA Designation Criteria	
<b>Total</b>		9.5

Data Compiled: August 2023

Source: "West TN Regional Assessment Forecasts for Population," Younger Associates (Full algorithm for all West Tennessee Counties are found in the "West TN Regional Assessment Forecasts for Population")

## EMPLOYMENT & COMMUTE PATTERNS

Lauderdale County has an existing base of major employers that will continue to attract workers and support demand for housing. The top 10 industrial employers in Lauderdale County are listed below by number of employees.

### LAUDERDALE COUNTY TOP 10 INDUSTRIAL/DISTRIBUTION EMPLOYERS

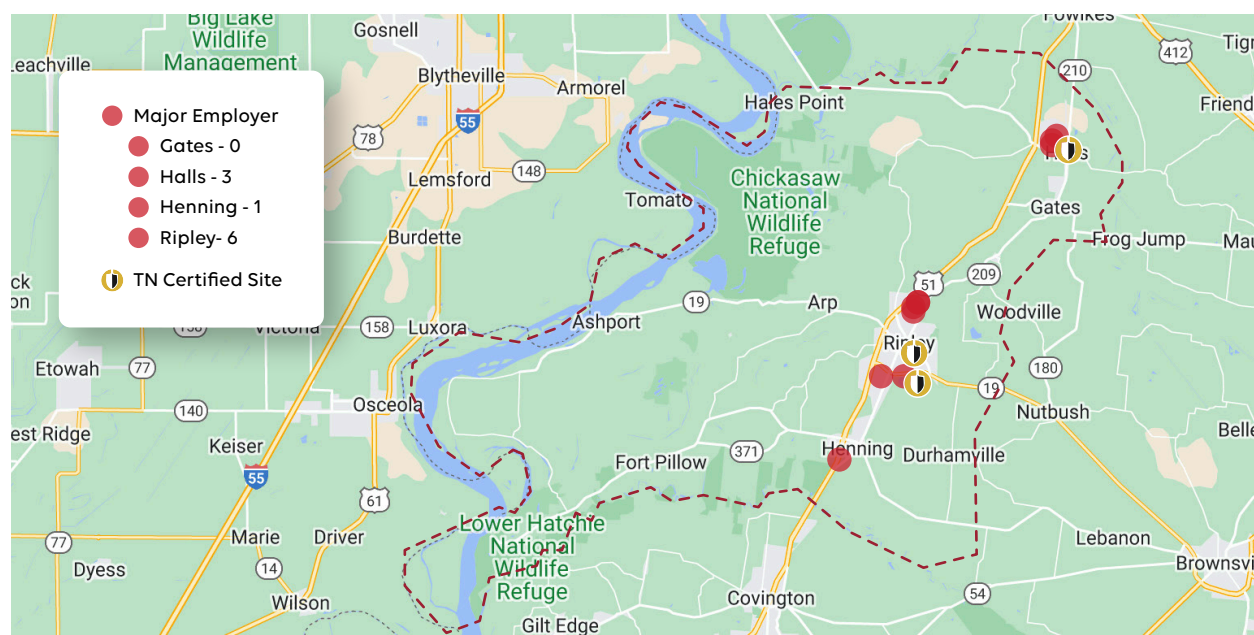
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|--|---|
| 1. Marvin Windows & Doors of Tennessee – 725 | 6. American Greetings – 120               |
| 2. Komatsu American Corp – 323               | 7. Sanders Trucking, Inc. (JST, LLC) – 91 |
| 3. Workwear Outfitters – 265                 | 8. Crafcro, Inc. – 78                     |
| 4. West TN Expediting – 202                  | 9. The Royal Group – 54                   |
| 5. Pierce Distribution Services – 145        | 10. FAIST Light Metals Tennessee – 50     |

While Lauderdale County has not had any new industrial announcements during the period from January 2021 to March 2024, the presence of three certified sites makes them a likely choice for auto part suppliers and distribution companies. As the list above shows, Lauderdale County has a history of attracting a range of industrial employers.

Map 2 on the next page shows recent economic development projects announced in West Tennessee and the locations of certified industrial sites in the region. The location of three certified sites along US Hwy 51 in Lauderdale County is advantageous.

The *West TN Planning Regional Assessment Forecasts for Employment* analyzes the types of support industries and jobs that will be created to bolster the economic growth generated by BOC. This report was produced by TNECD's West TN Planning effort in October 2023. It provides information on jobs by occupation type as well as regional and national wage rates. With three Tennessee certified sites and its proximity to BOC, Lauderdale County is poised to attract tier 2 and 3 industrial manufacturing suppliers as well as other employers creating more jobs in the local economy.

### GRAPHIC 1 | LAUDERDALE COUNTY MAJOR EMPLOYERS & CERTIFIED SITES





- 21-County West Tennessee Region
- Announced in 2021
- Announced in 2022
- Announced in 2023
- Announced in 2024
- TN Certified Sites
- U.S. Interstates
- U.S. Highways
- State Highways
- State Highways w/Planned Improvement

**Benton County**  
Jobs: 70 • Investment: 12.3 Mil

**Carroll County**  
Jobs: 588 • Investment: \$34.7 Mil

**Chester County**  
Jobs: 30 • Investment: \$5.0 Mil

**Crockett County**  
Jobs: 35 • Investment: \$3.9 Mil

**Fayette County**  
Jobs: 611 • Investment: \$208.1 Mil

**Gibson County**  
Jobs: 318 • Investment: \$56.6 Mil

**Hardeman County**  
Jobs: 172 • Investment: \$14.4 Mil

**Hardin County**  
Jobs: 20 • Investment: \$1.0 Mil

**Haywood County**  
Jobs: 7,073 • Investment: \$6.4 Mil

**Henderson County**  
Jobs: 155 • Investment: \$16.1 Mil

**Henry County**  
Jobs: 163 • Investment: \$11.4 Mil

**Lake County**  
Jobs: 140 • Investment: \$150.0 Mil

**Madison County**  
Jobs: 991 • Investment: \$779.9 Mil

**McNairy County**  
Jobs: 187 • Investment: \$35.6 Mil

**Obion County**  
Jobs: 20 • Investment: \$1.4 Mil

**Shelby County**  
Jobs: 2,647 • Investment: \$324.3 Mil

**Weakley County**  
Jobs: 36 • Investment: \$2.2 Mil

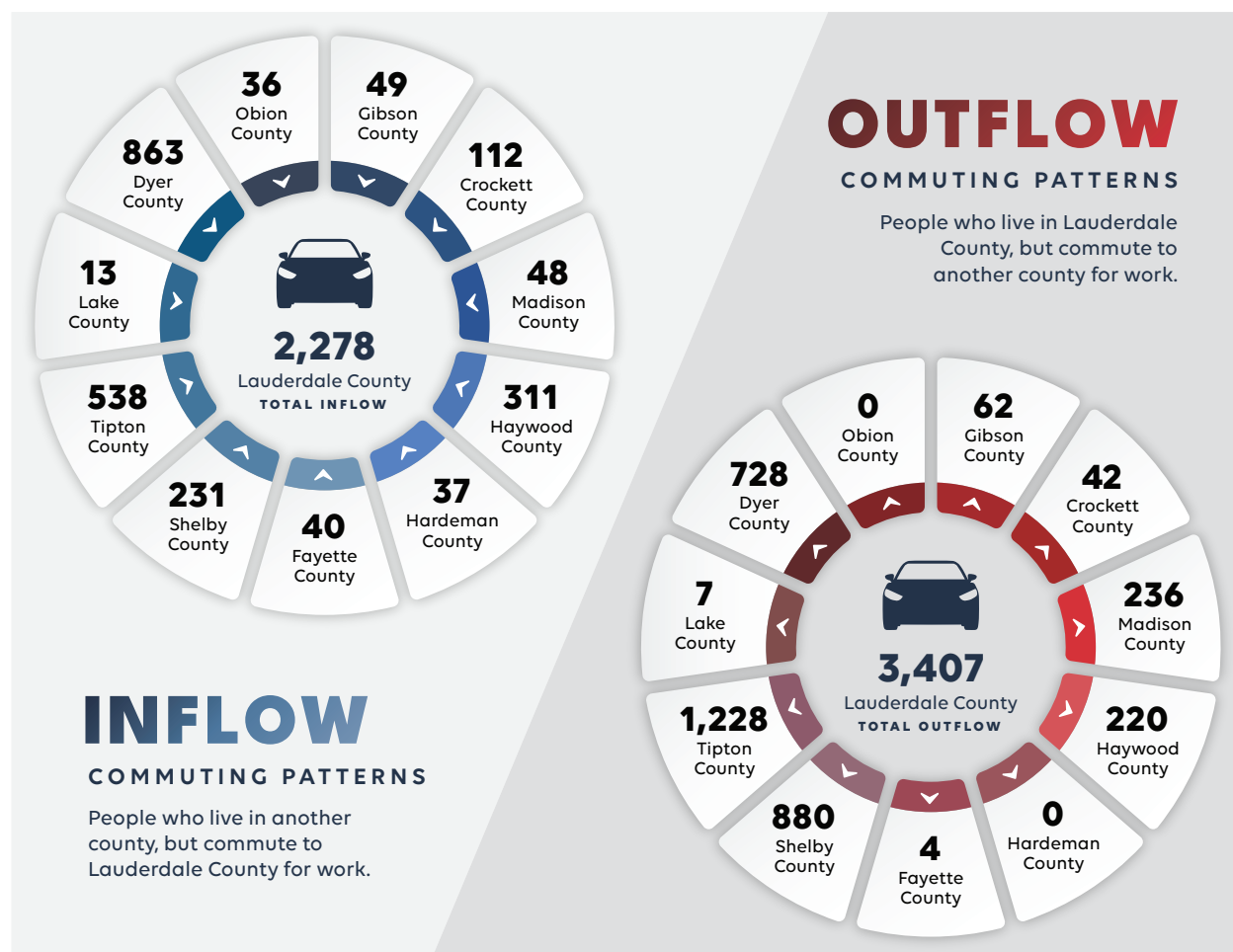
### 21-County West TN Region Total

Jobs: 13,256  
Investment: \$8.0 Bil



Graphic 2 displays the commute patterns among workers in the contiguous and nearby counties with the highest commuting activity into and out of Lauderdale County. Historically, a significant proportion of workers living in Lauderdale County have commuted to other counties, where there is a higher density of jobs and more diversity of available occupations.

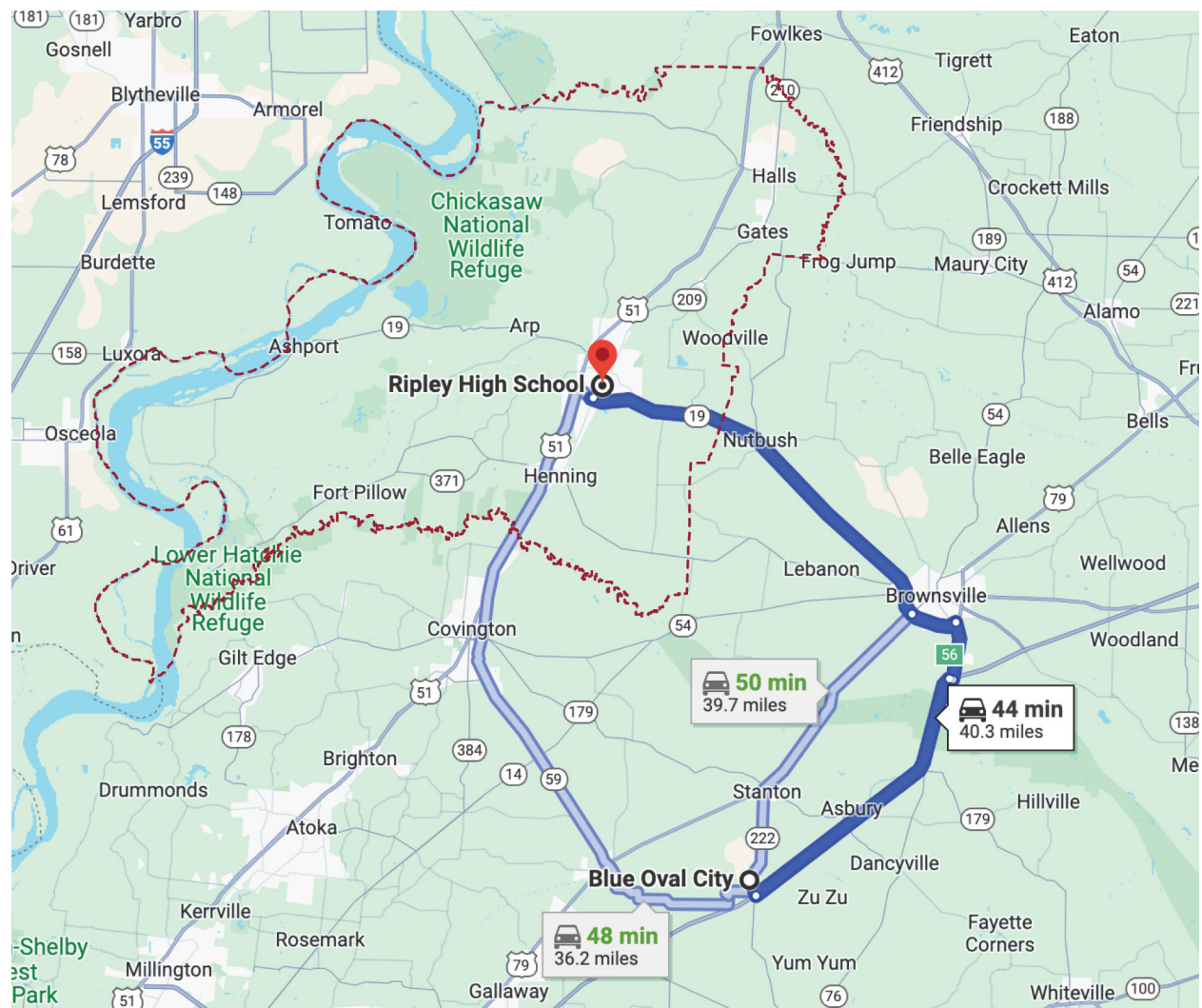
**GRAPHIC 2 | COMMUTE PATTERNS**



Source: U.S. Census Bureau: County to County Commuting Flows- ACS 2016-2020, Younger Associates

Approximately 5,505 people live and work in Lauderdale County, while an estimated 3,400 workers travel outside the county for employment. Among the counties depicted, approximately 2,300 people in-commute to Lauderdale County for work, meaning that an estimated net total of 1,100 people leave the county for their jobs.

**GRAPHIC 3 | COMMUTE FROM RIPLEY TO BLUEOVAL CITY**



In the early years of BOC operations, it is expected that a large number of workers will in-commute to the campus from other counties, where housing is more readily available. Later, as more housing is constructed nearer the BlueOval campus, workers may choose to locate closer to their place of work. However, the 30-minute commute from Henning could allow for an acceptable commute time if housing was available in that community.

Below are the approximate drive-times from Lauderdale County's municipalities to BlueOval City.

- » Gates – 48 minutes
- » Halls – 53 minutes
- » Henning – 41 minutes
- » Ripley – 44 minutes

Funding for improvements to TN Highway 19 that will widen it to a Super 2 Lane highway has been approved.



## PROJECTED HOUSING DEMAND

Population growth projections can be translated into housing demand based on average household size. Projections can be further estimated in regard to single-family households and multi-family households based on historical, local, and regional patterns.

Based on these factors, it is projected that demand for housing in Lauderdale County in 2035 will range from 2,300 to 2,812 units. Tables 3A - 3C show unconstrained housing demand projections for Lauderdale County. These projections are driven by population only and are not constrained by factors such as infrastructure capability and land available for development.

**TABLE 3A | HOUSING DEMAND PROJECTIONS – 2035**

Projected Housing Demand by 2035		
2035 Projected Population Growth <sup>1</sup>	6,058	
Average Number Per Household Unit <sup>2</sup>	2.37	
Percent of Owner-Occupied Housing Units <sup>3</sup>	70%	
Percent of Renter-Occupied Housing Units <sup>3</sup>	30%	
	Low Range	High Range
<b>Projected Total Housing Units</b>	<b>2,300</b>	<b>2,812</b>
Projected New Owner-Occupied Housing Units	1,610	1,986
Projected New Renter-Occupied Housing Units	690	844

1. Data from the "West TN Regional Assessment Forecasts for Population" report.

2. 2024 Claritas Environics estimate based on 2020 Census data.

3. The percentage of Owner- and Renter-Occupied housing units were adjusted to reflect the state average for counties with high concentrations of Section 8 and government housing units.

**TABLE 3B | HOUSING DEMAND PROJECTIONS – 2035-2045**

Projected Housing Demand 2035-2045		
2035-2045 Projected Population Growth <sup>1</sup>	1,610	
2045 Projected Number Per Household Unit <sup>2</sup>	2.41	
Percent of Owner-Occupied Housing Units <sup>3</sup>	70%	
Percent of Renter-Occupied Housing Units <sup>3</sup>	30%	
	Low Range	High Range
<b>Projected Total Housing Units</b>	<b>1,449</b>	<b>1,771</b>
Projected New Owner-Occupied Housing Units	1,014	1,240
Projected New Renter-Occupied Housing Units	435	531

1. Data from the "West TN Regional Assessment Forecasts for Population" report.

2. Assumes a 15% increase in the number of persons per household based on 2020 Census data from 2024 Claritas Environics.

3. The percentage of Owner- and Renter-Occupied housing units were adjusted to reflect the state average for counties with high concentrations of Section 8 and government housing units.

**TABLE 3C | HOUSING DEMAND PROJECTIONS – TOTAL BY 2045**

Total Housing Units Needed by 2045		
	Low Range	High Range
<b>Projected Total Housing Units</b>	<b>3,749</b>	<b>4,583</b>
Projected New Owner-Occupied Housing Units	2,624	3,208
Projected New Renter-Occupied Housing Units	1,125	1,375

The current percentage of the population in Lauderdale County occupying rental housing is higher than regional and state averages. This is primarily due to a significant portion of the rental population living in public housing or government rent-subsidized housing.

Local housing authority officials noted when interviewed for this report that housing vouchers issued in the past few months have gone unused. The potential renters who have been issued these vouchers could not find a rental unit for the value of the voucher because rental prices have been driven up by market rate renters seeking housing in Lauderdale County.

Therefore, future projections of rental demand, as a percentage of total housing demand, were adjusted downward from the current rate. The wage rates related to BOC will not directly generate demand for rent-subsidized housing. It is assumed that the percentage of demand for subsidized housing will normalize toward the overall state and regional averages.

Table 3D shows the projected housing demand distributed by the number of bedrooms per unit. This distribution is based on current occupied housing units.

**TABLE 3D | DISTRIBUTION OF HOUSING UNITS BY ROOMS**

Distribution of Housing Units by Number of Rooms <sup>1</sup>			
	Percentage	Low Range	High Range
<b>Projected Total Housing Units</b>	<b>100%</b>	<b>3,749</b>	<b>4,583</b>
One Bedroom or Less	6.5%	244	298
2-3 Bedrooms	78.2%	2,932	3,584
4 Bedrooms or More	15.3%	574	701

1. U.S. Census Bureau American Community Survey 2022 Housing Occupancy by Bedroom for Lauderdale County.

## PROJECTED HOUSING AFFORDABILITY

Multiple national studies published since 2020 have shown that the availability of housing, especially that workers can reasonably afford based on their household wages, is among the top three factors in determining where people choose to locate. The other consistently top-rated location decision factors are proximity to high quality public education and commute time to work.

Table 4 below shows the range of home prices that are considered affordable by mortgage lenders based on the existing average annual household wages in Lauderdale County, and on wages projected to be paid by Ford and SK at BlueOval City. The ranges are shown for single- and double-income households.

Table 4 also shows the range of rental rates that are affordable based on single-income and double-income households earning the Lauderdale County annual average wage, and the BlueOval projected wage rates. The estimated rental rates are based on national studies of rental cost to income, which indicate that approximately 30% of income is the normal range for an affordable, comfortable monthly rental rate.

**TABLE 4 | SINGLE-FAMILY DWELLING & RENTAL PURCHASING POWER – 2025**

Projected Annual Average Wage	2023	2024	2025
Lauderdale County <sup>1</sup>	\$46,877	\$49,221	\$51,682
BlueOval City (BOC) Production <sup>2</sup>	\$43,680	\$45,864	\$48,517
BlueOval City (BOC) Technical <sup>2</sup>	\$55,561	\$58,339	\$61,256

Estimated Home Purchasing Power Range <sup>3</sup>	Low Range	High Range
Lauderdale County Annual Average Wage – 1 Earner	\$129,205	\$206,729
Lauderdale County Annual Average Wage – 2 Earners	\$258,411	\$413,457
BOC Production Annual Average Wage – 1 Earner	\$120,393	\$192,629
BOC Production Annual Average Wage – 2 Earners	\$240,786	\$385,258
BOC Technical Annual Average Wage – 1 Earner	\$153,140	\$245,024
BOC Technical Annual Average Wage – 2 Earners	\$306,280	\$490,048

Estimated Monthly Rent Power Range <sup>4</sup>	Low Range	High Range
Lauderdale County Annual Average Wage – 1 Earner	\$1,206	\$1,335
Lauderdale County Annual Average Wage – 2 Earners	\$2,412	\$2,670
BOC Production Annual Average Wage – 1 Earner	\$1,124	\$1,244
BOC Production Annual Average Wage – 2 Earners	\$2,247	\$2,488
BOC Technical Annual Average Wage – 1 Earner	\$1,429	\$1,582
BOC Technical Annual Average Wage – 2 Earners	\$2,859	\$3,165

1. Based upon data from the Tennessee Department of Labor; Annual Average Wage for Lauderdale County, 2022 for all industries with a 5% inflation factor applied for each year until 2025.

2. Supplied by Tennessee Department of Community and Economic Development based on announced wages in 2022 with a 5% inflation factor for each year until 2025.

3. Fidelity Viewpoints June 2022 recommends a mortgage range of 3-5X annual income.

4. RentCafe.com suggests 30% of annual income for a comfortable and affordable monthly rental rate.



**AFFORDABLE  
HOUSING  
VALUE RANGE**

**\$120,393**

LOWEST WAGE  
ONE-INCOME  
HOUSEHOLD

**\$490,048**

HIGHEST WAGE  
TWO-INCOME  
HOUSEHOLD



**AFFORDABLE  
MONTHLY  
RENT RANGE**

**\$1,124**

LOWEST WAGE  
ONE-INCOME  
HOUSEHOLD

**\$3,165**

HIGHEST WAGE  
TWO-INCOME  
HOUSEHOLD



# CURRENT HOUSING MARKET

The Lauderdale County construction and residential development pipeline will not currently meet the unconstrained population and housing demand forecast. The entire Impact Zone housing market, like the national housing market, is experiencing an extended housing shortage. New residential construction has not returned to the levels prior to the 2007-2008 financial crisis. Additionally, the COVID-19 pandemic, followed by related housing material shortages, supply chain disruptions, and lack of available labor in the skilled trades have exacerbated the shortage.

## SINGLE-FAMILY HOUSING STATISTICS

In rural areas such as Lauderdale County, new housing starts have been extremely low. From January 2021 through June 2023, there were 27 housing starts reported in Lauderdale County. Much of the existing housing stock in Lauderdale County is older, with the median age of a house being 42 years versus 38 years for the State of Tennessee. Table 5 below shows the age range of housing for Lauderdale County, for the Impact Zone non-metro areas, and for Tennessee.

**TABLE 5 | AGE OF OWNER-OCCUPIED HOUSING UNITS**

	Lauderdale County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
<b>2024 Est. Housing Units by Year Structure Built</b>						
Built 2020 or Later	51	0.48	2,111	2.67	126,984	4.03
Built 2010 to 2019	429	4.02	5,148	6.50	299,919	9.53
Built 2000 to 2009	1,777	16.67	14,709	18.58	486,336	15.45
Built 1990 to 1999	1,903	17.85	15,847	20.02	528,972	16.80
Built 1980 to 1989	1,494	14.01	10,216	12.90	412,165	13.09
Built 1970 to 1979	1,868	17.52	11,915	15.05	448,106	14.23
Built 1960 to 1969	1,210	11.35	7,732	9.77	295,192	9.38
Built 1950 to 1959	736	6.90	4,647	5.87	253,547	8.05
Built 1940 to 1949	482	4.52	2,911	3.68	127,624	4.05
Built 1939 or Earlier	711	6.67	3,932	4.97	169,147	5.37
<b>2024 Housing Units by Year Structure Built</b>						
2024 Est. Median Year Structure Built	1982		1988		1987	

Source: Claritas Environics 2024 Data

The value of existing homes in Lauderdale County is far below the state and regional values. Table 6 below shows number of homes by value range.

**TABLE 6 | HOUSING UNITS BY VALUE**

	Lauderdale County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
<b>2024 Est. Owner-Occupied Housing Units by Value</b>						
Value Less Than \$20,000	317	5.45	1,311	2.49	37,743	2.02
Value \$20,000 - \$39,999	287	4.94	1,810	3.43	39,994	2.14
Value \$40,000 - \$59,999	316	5.44	1,671	3.17	40,283	2.15
Value \$60,000 - \$79,999	665	11.44	2,756	5.23	59,043	3.16
Value \$80,000 - \$99,999	604	10.39	3,702	7.02	73,713	3.94
Value \$100,000 - \$149,999	1,231	21.18	8,689	16.48	197,373	10.55
Value \$150,000 - \$199,999	978	16.83	7,314	13.88	205,333	10.97
Value \$200,000 - \$299,999	898	15.45	10,667	20.24	392,633	20.98
Value \$300,000 - \$399,999	257	4.42	6,488	12.31	287,869	15.38
Value \$400,000 - \$499,999	121	2.08	3,428	6.50	199,656	10.67
Value \$500,000 - \$749,999	80	1.38	2,931	5.56	180,847	9.67
Value \$750,000 - \$999,999	26	0.45	1,128	2.14	84,454	4.51
Value \$1,000,000 - \$1,499,999	18	0.31	500	0.95	43,488	2.32
Value \$1,500,000 - \$1,999,999	4	0.07	194	0.37	14,073	0.75
Value \$2,000,000 or more	10	0.17	123	0.23	14,552	0.78
<b>2024 Est. Median All Owner-Occupied Housing Value</b>	<b>\$127,543</b>		<b>\$193,341</b>		<b>\$269,743</b>	

Source: Claritas Environics 2024 Data

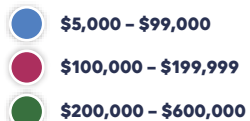
The number of annual home sales in Lauderdale County has been more active than some of the other rural counties in West Tennessee, with 96 sales in the first six months of 2023 as shown in the table below. Map 3 on the following page depicts where the home sales were located in the county. The majority of home sales occurred within the City of Ripley.

Based on housing sales in 2023, Lauderdale County's average price per square foot of \$97 was lower than the average for the 21-county West Tennessee Region of \$121 per square foot.

**TABLE 7 | SOLD HOUSES - JANUARY 2023 TO JUNE 2023**

	Lauderdale
Number Sold	96
Average Price	\$158,201
Average Days on the Market	47.9
Average Year Built	1971
Average Sq. Ft.	1,669
Average Price per Sq. Ft.	\$97
Average # of Bedrooms	3

Source: Multiple Listing Service (MLS)



— County Boundary



**96**

NUMBER SOLD



**\$158,201**

AVERAGE PRICE



**47.9**

AVERAGE DAYS ON THE MARKET



**1971**

AVERAGE YEAR BUILT



**1,669**

AVERAGE SQ. FT.



**\$97**

AVERAGE PRICE PER SQ. FT.



**3**

AVERAGE # OF BEDROOMS

## MULTI-FAMILY HOUSING STATISTICS

There are no modern multi-family apartments or large condominium developments within Lauderdale County. Most renters are renting single-family homes or are living in rent-subsidized housing built with U.S. Department of Housing and Urban Development (HUD) funds or by Rural Development in the 1960's and 1970's.

**TABLE 8 | OWNER- VS RENTER-OCCUPIED HOUSING UNITS**

	Lauderdale County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
<b>2024 Est. Occupied Housing Units – Owner- vs Renter- Occupied</b>						
Housing Units, Owner-Occupied	5,812	61.04	52,712	72.43	1,871,054	65.68
Housing Units, Renter-Occupied	3,709	38.96	20,062	27.57	977,654	34.32

Source: Claritas Environics 2024 Data

The percentage of renter-occupied units in Lauderdale County is higher in the region than the state, as illustrated by the table above. This can be related to the proportion of low-income and households in Lauderdale County.

There are 6 multi-family housing developments with approximately 350 units in Lauderdale County, most of which accept Section 8 vouchers. Additionally, Ripley Housing Authority has 325 units for low income households, all of which are currently filled and have a lengthy waiting list for future openings.

## CURRENT RESIDENTIAL DEVELOPMENT PIPELINE

While there is widespread awareness across Tennessee and the greater Southeast region about the BlueOval City project and the anticipated growth it will generate, the initial progress of new residential development has been slow. It is challenging to gather complete information on the plans of private developers who are assessing the county for potential projects.

The city and county mayors, as well as local real estate agencies are often approached by potential developers and others who are evaluating the Lauderdale County market for residential investments. This report, supported by other reports from West TN Planning, can help developers with their evaluations. Additionally, further information will be available in the community master plans under development through West TN Planning which has gathered public and technical input for potential residential development.

**GRAPHIC 4 | APPROVED VS PROSPECTIVE HOUSING DEVELOPMENTS AS OF JULY 2024**

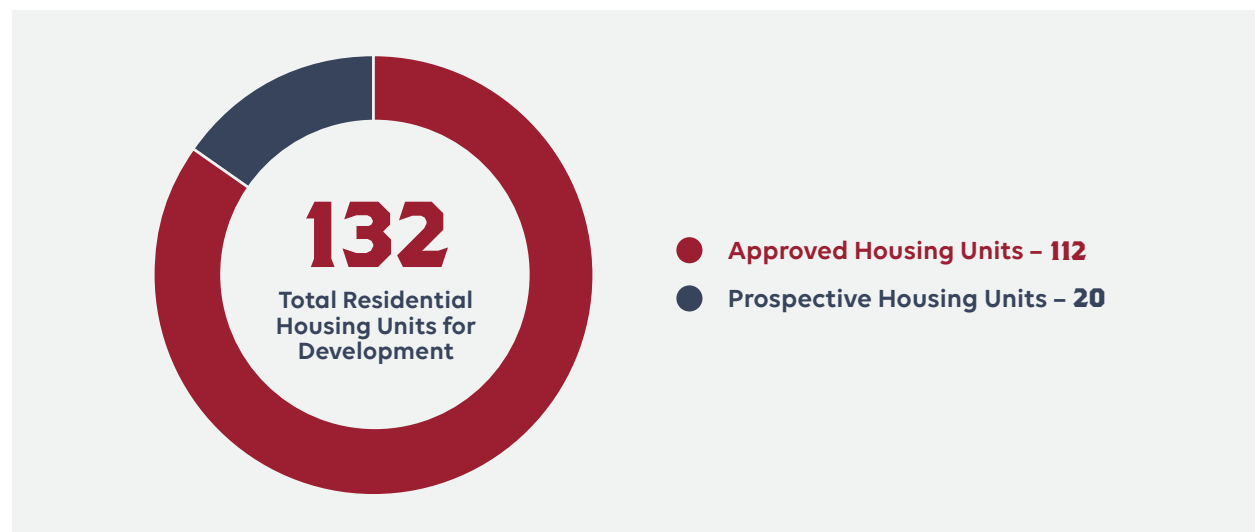


Table 10 on the next two pages provides the current residential development plans that have progressed into the formal pipeline.



**TABLE 9 | NEW SINGLE FAMILY & MULTI-FAMILY HOUSING DEVELOPMENTS PLANS**

Town of Gates			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Donna Smith - City Recorder
<b>Total</b>	<b>0</b>		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	Donna Smith - City Recorder
<b>Total</b>	<b>0</b>		
Town of Halls			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Tammy Lewis - City Recorder/Manager
<b>Total</b>	<b>0</b>		
Single-Family			
Name	Units	Status	Source
Marshall Drive Subdivision	20	Land Owner Intends to Develop	Tammy Lewis - City Recorder/Manager
<b>Total</b>	<b>20</b>		
Town of Henning			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Amanda Adkerson - City Recorder
<b>Total</b>	<b>0</b>		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	Amanda Adkerson - City Recorder
<b>Total</b>	<b>0</b>		

*Note: Due to limited information from local agencies, the data provided is not guaranteed. More developments could be underway and the current assumptions are subject to change.*

**TABLE 9 | NEW SINGLE FAMILY & MULTI-FAMILY HOUSING DEVELOPMENTS PLANS**

City of Ripley			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Donna Buckner - City Recorder/Treasurer
<b>Total</b>	<b>0</b>		
Single-Family			
Name	Units	Status	Source
Fox Berry	72	Buildable Lots	Donna Buckner - City Recorder/Treasurer
Kirkpatrick	4	Buildable Lots	Donna Buckner - City Recorder/Treasurer
Willow Creek	8	Buildable Lots	Donna Buckner - City Recorder/Treasurer
Jordan	12	Buildable Lots	Donna Buckner - City Recorder/Treasurer
Oakwoods	11	Buildable Lots	Donna Buckner - City Recorder/Treasurer
Hendren	5	Buildable Lots	Donna Buckner - City Recorder/Treasurer
<b>Total</b>	<b>112</b>		

Lauderdale County			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	
<b>Total</b>	<b>0</b>		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	
<b>Total</b>	<b>0</b>		

Housing Pipeline	Prospective	Approved	Total
Multi-Family	0	0	0
Single-Family	20	112	132
<b>Total</b>	<b>20</b>	<b>112</b>	<b>132</b>

Note: Due to limited information from local agencies, the data provided is not guaranteed. More developments could be underway and the current assumptions are subject to change.

## NEW HOUSING DEVELOPMENT CAPACITY

A mathematical analysis of land use finds that approximately 4,670 housing units could be constructed within the Urban Growth Boundaries in Lauderdale County.

This was critical for planning because the population forecast, by design, was based on where people would likely choose to live. The population forecast did not evaluate availability or constraints in current housing supply. **This analysis finds that there is sufficient developable land to meet the forecasted housing demand.**

**TABLE 10 | LAUDERDALE COUNTY ACREAGE BREAKDOWN**

	Total Acreage
Lauderdale County	324,816
Halls Town Limits	2,353
Halls UGB* Limits	9,535
Henning Town Limits	1,708
Henning UGB* Limits	39,899
Gates Town Limits	455
Gates UGB* Limits	4,168
Ripley City Limits	8,237
Ripley UGB* Limits	26,263

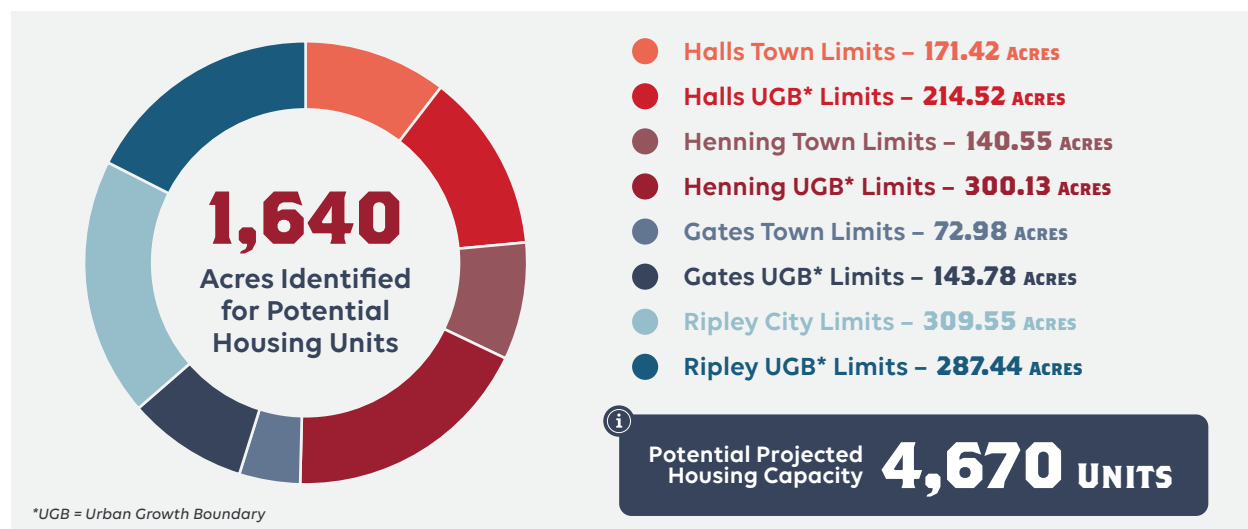
\*UGB = Urban Growth Boundary

However, the population and housing demand forecasts will only reach the full projected potential if current constraints are eliminated. Most national and regional large-scale developers are unfamiliar with Lauderdale County. There is a perceived risk of development due to unknown development patterns and, in some cases, a lack of online information available for developing in these communities.

Both Ripley and Henning currently have infrastructure improvements within the project development process. These forecasts underscore the need to implement these projects, which will include identifying and securing the necessary funding to do so.

Henning, the closest community to BOC, has the largest urban growth boundary, which factors significantly into projected housing capacity in the land analysis. However, water and sewer infrastructure will have to be addressed in Henning before any substantial development can occur. For more information on these improvements, see the Lauderdale County master plans developed through West TN Planning. Henning's small population, lack of a commercial tax base, and lack of resources are an obstacle to development.

**GRAPHIC 5 | LAUDERDALE COUNTY POTENTIAL DEVELOPABLE LAND AT A GLANCE**



Tables 11A and 11B on the next two pages detail the potential development capacity based on current land use, jurisdictional boundaries, and Urban Growth Boundaries (UGBs). Areas for development, based on the noted calculation methodology, have been color-coded on Maps 4-6. These are mathematical calculations of potential development capacity, not recommendations on development location. They should not be considered to be consistent with any approved future land use or other planning documents that may be adopted, nor is this an indication of where new development will actually occur.

**TABLE 11A | HOUSING MARKET DEVELOPMENT CAPACITY SUMMARY (UGB)**

Parcels By Location	%	Total Parcel Acreage	Developable Acres based on %	DU/Acre Assumption	Units
Parcels Within Urban Growth Boundary, but not in town limits or floodplain					
<b>Halls UGB</b>					
Agricultural Tract Unimproved (No SFR)	10%	1,524.92	152.49	2	305
Agricultural Tract w/Mobile Home(s)	0%	303.31	0.00	2	0
Agricultural Tract w/SFR	0%	616.42	0.00	2	0
Vacant Lot – less than 5 acres	85%	29.62	25.18	2	50
Vacant Tract – 5 acres or larger	85%	43.35	36.85	2	74
<b>TOTAL</b>		<b>2,517.62</b>			<b>429</b>
<b>Henning UGB</b>					
Agricultural Tract w/SFR & w/Mobile Home	0%	45.38	0.00	2	0
Agricultural Tract Unimproved (No SFR)	3%	10,004.21	300.13	2	600
Agricultural Tract w/Mobile Home(s)	0%	486.80	0.00	2	0
Agricultural Tract w/SFR & w/Mobile Home	0%	3,894.46	0.00	2	0
Tract Unimproved (No SFR)	0%	150.36	0.00	2	0
Vacant Lot – less than 5 acres	0%	133.14	0.00	2	0
Vacant Tract – 5 acres or larger	0%	514.59	0.00	2	0
<b>TOTAL</b>		<b>15,228.94</b>			<b>600</b>
<b>Gates UGB</b>					
Agricultural Tract w/SFR & w/Mobile Home	0%	22.28	0.00	2	0
Agricultural Tract Unimproved (No SFR)	10%	1,029.18	102.92	2	206
Agricultural Tract w/Mobile Home(s)	0%	17.64	0.00	2	0
Agricultural Tract w/SFR	0%	762.96	0.00	2	0
Vacant Lot – less than 5 acres	85%	19.95	16.96	2	34
Vacant Tract – 5 acres or larger	85%	28.11	23.90	2	48
<b>TOTAL</b>		<b>1,880.13</b>			<b>288</b>
<b>Ripley UGB</b>					
Agricultural Tract w/SFR & w/Mobile Home	3%	191.92	3.84	2	8
Agricultural Tract Unimproved (No SFR)	5%	3,993.95	199.70	2	399
Agricultural Tract w/Mobile Home(s)	5%	433.27	21.66	2	43
Agricultural Tract w/SFR	0%	3,832.00	0.00	2	0
Tract Unimproved (No SFR)	0%	39.25	0.00	2	0
Vacant Lot – less than 5 acres	10%	275.45	27.55	2	55
Vacant Tract – 5 acres or larger	10%	346.97	34.70	2	69
<b>TOTAL</b>		<b>9,112.81</b>			<b>575</b>



**TABLE 11B | HOUSING MARKET DEVELOPMENT CAPACITY SUMMARY (CITY/TOWN)**

Parcels By Location	%	Total Parcel Acreage	Developable Acres based on %	DU/Acre Assumption	Units
<b>Parcels within Town Limits, but not in floodplain</b>					
<b>Halls Town Limits</b>					
Agricultural Tract Unimproved (No SFR)	10%	420.74	42.07	4	168
Agricultural Tract w/Mobile Home(s)	10%	178.37	17.84	4	71
Agricultural Tract w/SFR	10%	126.32	12.63	4	51
Vacant Lot – less than 5 acres	85%	64.64	54.95	4	220
Vacant Tract – 5 acres or larger	85%	51.69	43.93	4	176
<b>TOTAL</b>		<b>841.76</b>			<b>686</b>
<b>Henning Town Limits</b>					
Agricultural Tract Unimproved (No SFR)	10%	284.45	28.45	4	114
Agricultural Tract w/SFR	10%	64.13	6.41	4	26
Vacant Lot – less than 5 acres	85%	44.79	38.07	4	152
Vacant Tract – 5 acres or larger	85%	79.56	67.62	4	270
<b>TOTAL</b>		<b>472.93</b>			<b>562</b>
<b>Gates Town Limits</b>					
Agricultural Tract Unimproved (No SFR)	10%	59.46	5.95	4	24
Agricultural Tract w/SFR	10%	21.06	2.11	4	8
Vacant Lot – less than 5 acres	85%	41.91	35.63	4	143
Vacant Tract – 5 acres or larger	85%	34.47	29.30	4	117
<b>TOTAL</b>		<b>156.90</b>			<b>292</b>
<b>Ripley City Limits</b>					
Agricultural Tract Unimproved (No SFR)	8%	967.44	77.40	4	310
Agricultural Tract w/SFR	2%	868.79	17.38	4	70
Vacant Lot – less than 5 acres	15%	312.83	46.92	4	188
Vacant Tract – 5 acres or larger	60%	279.75	167.85	4	671
<b>TOTAL</b>		<b>2,428.81</b>			<b>1,238</b>
<b>TOTALS LAUDERDALE COUNTY</b>			<b>1,640</b>		<b>4,670</b>

**ASSUMPTIONS:**

- The assumed percentages of property that could be developed within town limits and Urban Growth Boundaries are listed in the table above as "developable acres." The percentages chosen are based on general sentiment from leadership and the community for how rural areas should be developed in the region to preserve agricultural land, reduce sprawl, and maintain the compact, small town character of the region. This concept to concentrate new development around existing infrastructure also provides for a more fiscally responsible development pattern.
- For the purpose of the calculations in this study, rural areas (areas outside of UGBs) were not considered for new housing development.
- The other properties assumed for no housing development include: any land with a current structure, semi-public, public, utilities, right-of-way, railroad, airports, floodzone areas, and conservation or protected lands.
- Due to the large tracts of land identified, it is assumed new right-of-way will need to be factored into the density calculations; therefore, conservative calculations for units per acre (DU/acre) were used, with a slightly higher density identified within current municipal boundaries. These are assumed to be single-family residences, but additional density is expected in some areas to accommodate a variety of unit types and sizes such as duplexes, townhomes and multi-family units consistent with what is allowed in jurisdictional zoning codes.

**DATA SOURCES:**

- Existing land use from Tennessee Comptroller of the Treasury, downloaded July 2023.
- Town limits and Urban Growth Boundaries.
- Development Capacity Methodology



This land use map was utilized to inform potential areas for future development. Parcels that were already developed or within a floodplain or preservation area were omitted from the analysis. Only properties within the Town Limits and Urban Growth Boundaries were considered for the calculations on pages 26 and 27.



**City/Town Limits**

**Urban Growth Boundaries**

## Existing Land Uses

- **Agricultural Tract w/ SFR & w/ Mobile Home**
- **Agricultural Tract Unimproved (No SFR)**
- **Agricultural Tract w/ Mobile Home**
- **Agricultural Tract w/ SFR**
- **Tract Unimproved (No SFR)**
- **Vacant - Resort Lot**  
(Vacant Residential Lot in Resort Subdivision)
- **Vacant Lot - Less than 5 acres**
- **Vacant Tract - 5 acres or larger**

SFR = Single Family Residential



This map does not depict where development is planned nor is it a recommendation for development of any specific sites.





This land use map was utilized to inform potential areas for future development. Parcels that were already developed or within a floodplain or preservation area were omitted from the analysis. Only properties within the Town Limits and Urban Growth Boundaries were considered for the calculations on pages 26 and 27.

- City/Town Limits
- Urban Growth Boundaries
- Public Schools
- TN Certified Sites

## Existing Land Uses

- Agricultural Tract w/ SFR & w/ Mobile Home
- Agricultural Tract Unimproved (No SFR)
- Agricultural Tract w/ Mobile Home
- Agricultural Tract w/ SFR
- Tract Unimproved (No SFR)
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(Vacant Residential Lot in Resort Subdivision)
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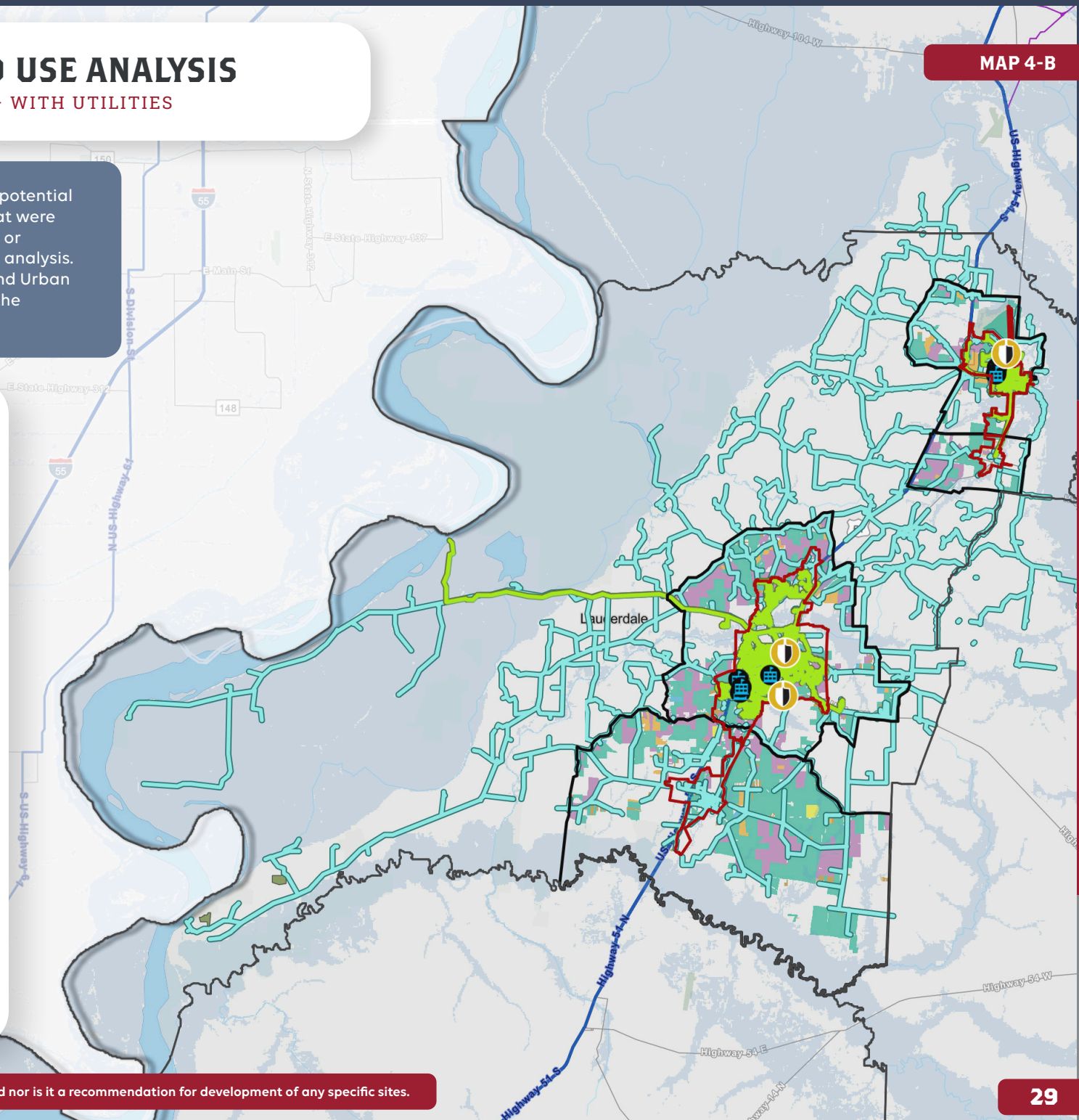
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- Water Lines
- Sewer Lines

Utility mapping for Henning and Gates is currently in progress, therefore only partial data was available at the time of this report.



This map does not depict where development is planned nor is it a recommendation for development of any specific sites.





This map highlights parcels that fit within land use categories where future development could potentially occur. However, only a small percentage of these areas was utilized to calculate the development potential shown on pages 26 and 27.

- City/Town Limits
- Urban Growth Boundaries
- Public Schools
- TN Certified Sites

## Existing Land Uses

- Agricultural Tract w/ SFR & w/ Mobile Home
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Although parcels at this scale are hard to see, there are opportunities for infill within the city limits.





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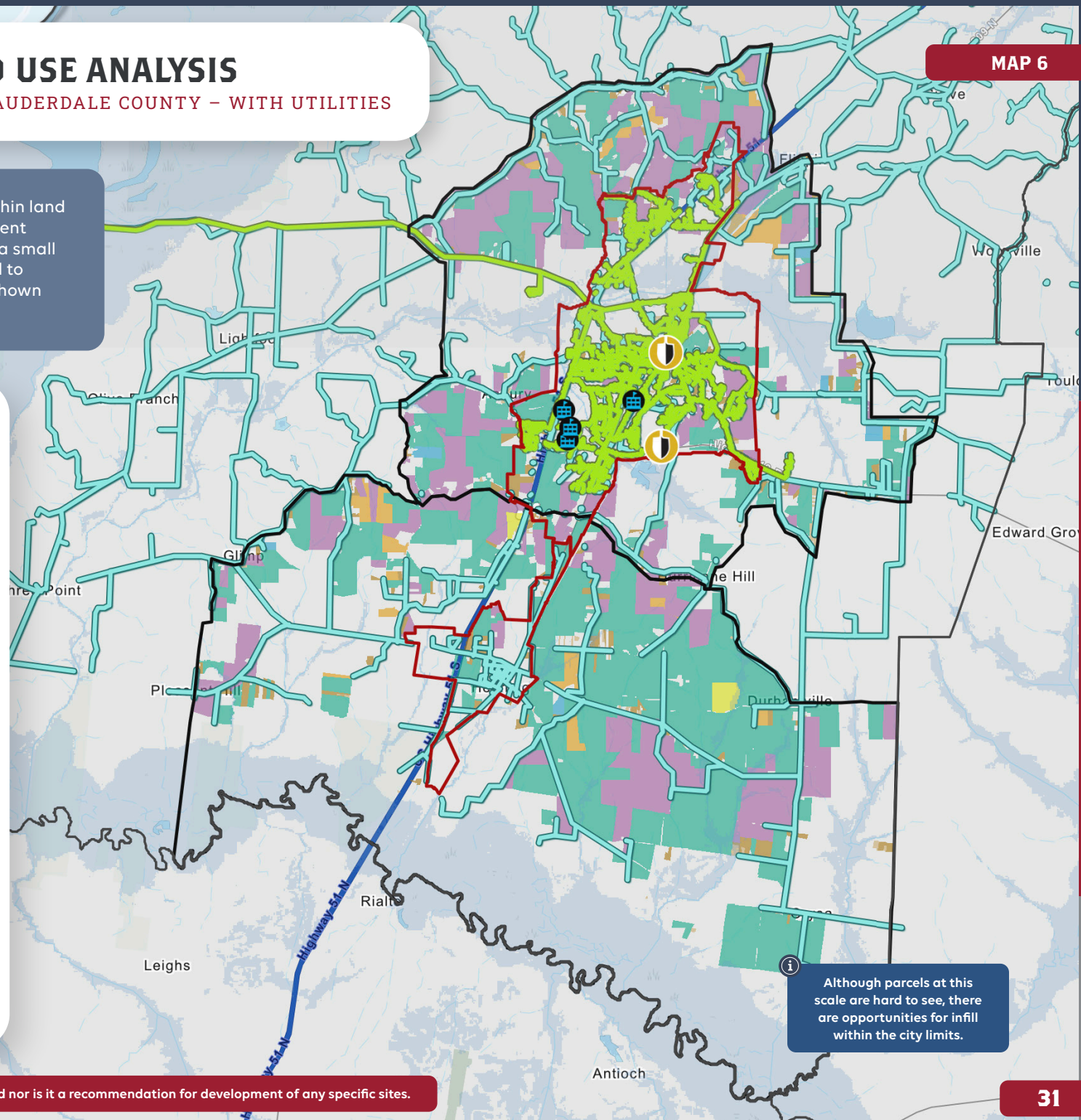
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Utility mapping for Henning and Gates is currently in progress, therefore only partial data was available at the time of this report.



This map does not depict where development is planned nor is it a recommendation for development of any specific sites.



Although parcels at this scale are hard to see, there are opportunities for infill within the city limits.



# RECOMMENDATIONS

The following recommendations should be considered the initial framework for Lauderdale County to develop partnerships and processes to address and prioritize the needs outlined in this report.

1

Promote infill development. There are numerous opportunities to build within existing residential areas by renovating or replacing substandard housing, or to build housing in defunct commercial areas. For example, a recent strategic plan for the City of Ripley presented the idea of creating housing on the site of the old hospital.

2

Increase density within the municipal boundaries. Update the zoning ordinances to allow for a variety of lot sizes and housing types. This will provide a mix of housing choices that can serve all age groups from young workers seeking their first housing to senior independent living communities. Zoning that allows for duplexes, fourplexes, townhouses, condos and other housing choices in addition to traditional subdivision development can help meet the needs of a range of working age people, allow seniors to downsize, and maximize the use of existing infrastructure.

3

Focus development within the Urban Growth Boundaries nearest to the municipal boundaries and water and wastewater infrastructure to protect farmland and environmentally sensitive areas. Developing areas with existing utility services will facilitate faster residential development to meet current housing demand. This will also allow more time for planning and financing essential investments to support growth over the next 20 years. Officials in Ripley and Halls report some excess capacity in water, wastewater, power and natural gas with plans to update and add more capacity. Henning and Gates will require larger investments in infrastructure to reach full population growth potential.

4

Utilize opportunities to develop regional infrastructure assets. Funding is more readily available for regional projects. Regionalization may be the best option for utilities with small customer bases due to the cost to operate, maintain, and improve capital assets.

5

Enforce and adhere closely to building codes. The Tennessee state building code is a minimum baseline for communities and areas in the county that do not have local building codes. Blight removal increases community safety and helps stabilize property values by not allowing sub-standard structures to devalue neighborhoods. Communities that have code enforcement demonstrate the positive effect of code enforcement and blight removal.

6

Create opportunities for residential development in downtown Ripley and Halls. Many quality-of-life amenities such as restaurants and landscaped walkways already exist in the downtown districts. Adding residents and more amenities can create an appealing residential and commercial mix. Grant funding from Tennessee Downtown and Main Street programs can help increase the number of amenities for residents in or adjacent to downtown and ensure the transportation network is equipped to support the growth.

7

Prepare to use Tax Increment Financing to assist in the development of mixed-use developments. This tool can help attract apartment buildings and quality residential density by providing public features such as parks, walking paths and recreation centers.

8

Remember that retail (and services) follows rooftops. Utilize population and housing growth projections to assist in recruiting new retailers and encouraging local business start-ups.

9

West Tennessee Planning is developing community master plans that will contain additional guidance based on public input that can help communities grow and maintain the characteristics of the community that current residents enjoy and appreciate.

10

Develop a county-wide residential development team to coordinate efforts. See page 34 for more information regarding this recommendation.

## DEVELOP A COUNTY-WIDE RESIDENTIAL DEVELOPMENT TEAM

Identify and develop a Residential Development Team comprised of the individuals responsible for attracting and supporting residential development, such as county and municipal planners, a representative from each mayor's office, utility providers, the chamber of commerce, the industrial development board and MidSouth Development District. The key local contacts that residential developers may need to reach should be clearly identified on all related websites.

This development team should coordinate efforts for maximum effectiveness in areas such as:

- » Establish a professional, regional approach to attract developers, investors, and corporations in the building industry. Large-scale residential developers could be targeted in order to familiarize them with Lauderdale County.
- » Improve communications across all county and municipal representatives and real estate brokers involved in marketing property and shepherding projects through the planning and approval process. Develop protocols for handling large residential development inquiries that are similar to the successful protocols used in Lauderdale County for handling industrial development.
- » Create a comprehensive master list of the residential development pipeline, including prospects. Collect a standard set of data on each prospective development and maintain a county-wide database.
- » Explore forming partnerships with major employers to increase quality of life amenities. Some strategies implemented by employer partnerships in other areas of the country include building a day care facility or funding neighborhood playgrounds or pools within new larger residential developments. Employees of the sponsoring employer receive preference in obtaining homes for sales in the development. These strategies could help overcome lack of amenity density for families with young children.
- » Create content to be posted on all relevant websites with information for developers and links to zoning maps, a guide to the development process, and a directory of who to contact at each step of development.
- » Post sites that are suitable for subdivision development or apartment complexes on national real estate sites such as LoopNet and CoStar. This could be a centralized process where specific individuals from the Residential Development team take responsibility for keeping the listings current.
- » Create marketing materials for key sites for residential development that are similar in nature to an industrial RFI response. Include pertinent development information and key attributes that make the site attractive to potential residents.

## ACKNOWLEDGMENTS

This analysis was made possible by a wide range of regional partners, the mayors of Halls, Henning, Gates, Ripley and Lauderdale County and their staffs; Mid-South Tennessee Development District; the Tennessee Housing Development Authority (THDA); the REALTORS® Association; area real estate agents; and others. Their assistance was invaluable in researching the existing housing inventory, the current housing pipeline, and the potential housing demand, and this analysis would not have been possible without their support.

This report was prepared by Younger Associates, HDR, and Gresham Smith on behalf of the West TN Planning team for the Tennessee Department of Economic and Community Development.



TOWN OF

**Gates**

TOWN OF

**Halls**

TOWN OF

**Henning**

