



MARSHALL COUNTY

TENNESSEE

corridors plan

04.22.21



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Eddie Wiles

MARSHALL COUNTY

Emily Darnell, Director of the Joint Economic and Community Development Board
Don Nelson, Building Codes Official/Zoning Administrator

AND THE CITIZENS OF MARSHALL COUNTY

CONSULTANT TEAM

Common Ground Urban Design + Planning
Randall Gross / Development Economics
KCI Technologies, Inc.



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PLAN PURPOSE

The purpose of this planning effort is to develop a set of land use and related policies to guide municipal decisions on future development and capital improvement projects along Marshall County's major corridors. The intent is to complement the County's Comprehensive Transportation Plan, completed in 2018, to guide future growth decisions, mainly related to transportation and mobility. The plan should also be considered an evolution—but not an update—to the County's state-mandated Growth Plan. Marshall County's Growth Plan was adopted in 2007 and needs revisiting in the near future; however, this effort revealed that some of the key concepts related to “smart growth” are still relevant today. With this plan, Marshall County can be ready to manage growth in a manner consistent with the community's vision of the future.



AERIAL MAP OF MARSHALL COUNTY WITH KEY CORRIDORS HIGHLIGHTED

PLAN PROCESS

The Marshall County Corridors Plan was created through a simple four-step planning process.



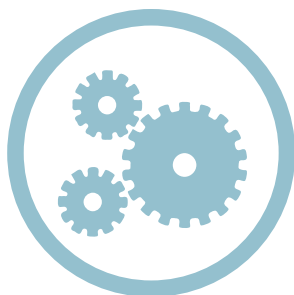
UNDERSTAND



PLAN



REFINE



IMPLEMENT

UNDERSTAND

The first step was to collect available background information, including mapping, economic and demographic data, current development regulations, and other policies and plans. We also toured the major corridors in the County with Marshall County staff and photographed the varying conditions. We then analyzed the collected information to understand the current situation and identify aspects of the corridors that could affect planning for their future.

PLAN

The second step began with a series of public workshops intended to engage the community and learn their vision for the future of the County's corridors. Four workshops were held, each with a similar format that consisted of presenting key findings from the review and analysis of background information and an interactive exercise that covered all the major corridors in the County. The team studied the results of the exercise, and the Consultant team brainstormed preliminary concepts. The team then presented these concepts to the County Planning Commission and the general public for feedback.

REFINE

In the third step of the process, the team refined the concepts based on input from staff, the Planning Commission, and the public. The draft plan document was then produced and submitted to County staff for review and input.

IMPLEMENT

After review by County staff, the final step in the process began. The consultant team presented the draft Plan to the public for final feedback. Once final comments were received, the final draft Plan was completed and submitted to the Planning Commission and the County Commission for adoption as the official policy guiding the future of Marshall County's corridors.

BACKGROUND ANALYSIS

MARSHALL COUNTY SNAPSHOT

Named after the longest-serving U.S. Supreme Court chief justice, John Marshall, Marshall County was created in 1836, just a year after Justice Marshall died. The County was formed from portions of Bedford, Giles, Lincoln, and Maury counties. Its county seat, Lewisburg, one of four current municipalities in the county, including Chapel Hill, Cornersville, and Petersburg. Marshall County was the home to three state governors and was the childhood home of the prominent and controversial Confederate Civil War General Nathan Bedford Forrest. The County is also home to Henry Horton State Park, named in honor of one of those three state governors. 700,000 people visit the park annually, with many enjoying the state's first golf course and others enjoying camping, hiking, picnicking, and other activities along the Duck River winding through the park.

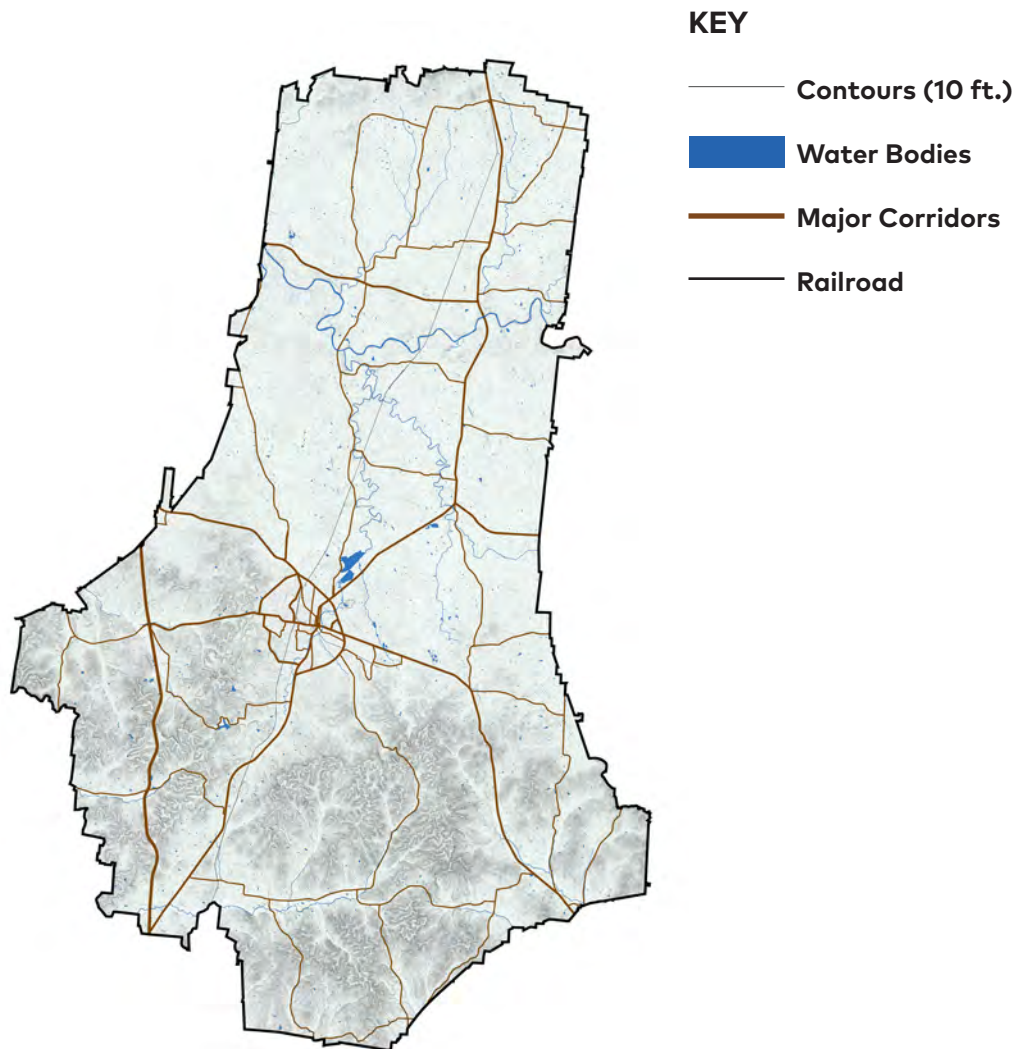
Economically, the county's historically agrarian roots have given way to manufacturing. Yet today, 70% of residents commute outside of the county for work. The county is growing, but areas in the northern portion of the County, such as Chapel Hill, are growing faster due to the growth emanating from Nashville and surrounding suburbs. Despite this growth, Marshall County maintains a rural character across much of its area, which significantly contributes to its rural and small-town feel.

While Marshall County's largest urban areas have not been immune to the effects of auto-dominated commercial sprawl, the county has managed to maintain a general pattern of development where activity is concentrated at key intersections along its corridors. This is an indication of the county's rural character, but it is also an opportunity. All developed areas were, at one point, rural or lightly developed. The concentration of development at centers of activity allows for the beloved rural corridors between such centers. Marshall County has largely enjoyed this character with the exceptions of areas in Lewisburg, Chapel Hill, and the interstate interchanges, where the advent of the automobile has contributed to a sprawling pattern of development. Marshall County is growing and will continue to grow; therefore, it is imperative to capitalize on its good patterns of development and minimize the commercial strip sprawl that has plagued so many other communities across the country.



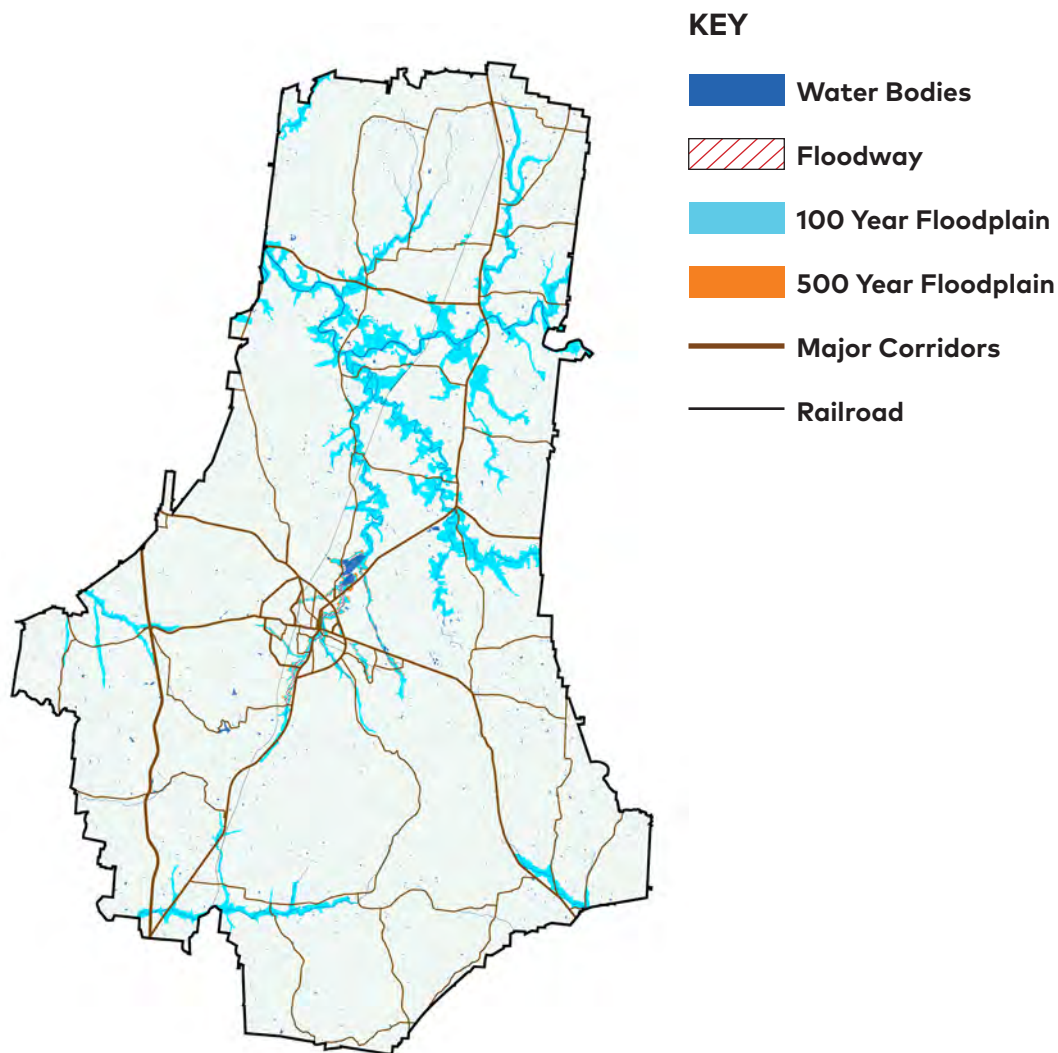
Clockwise from above: Historic Downtown Lewisburg where the County Annex sits today; Downtown Cornersville in 1908; Moore's Service Station in Cornersville. The mobility of the automobile has contributed to the decline of the county's traditional downtowns—similar to thousands of other communities across the country.

NATURAL ENVIRONMENT • TOPOGRAPHY



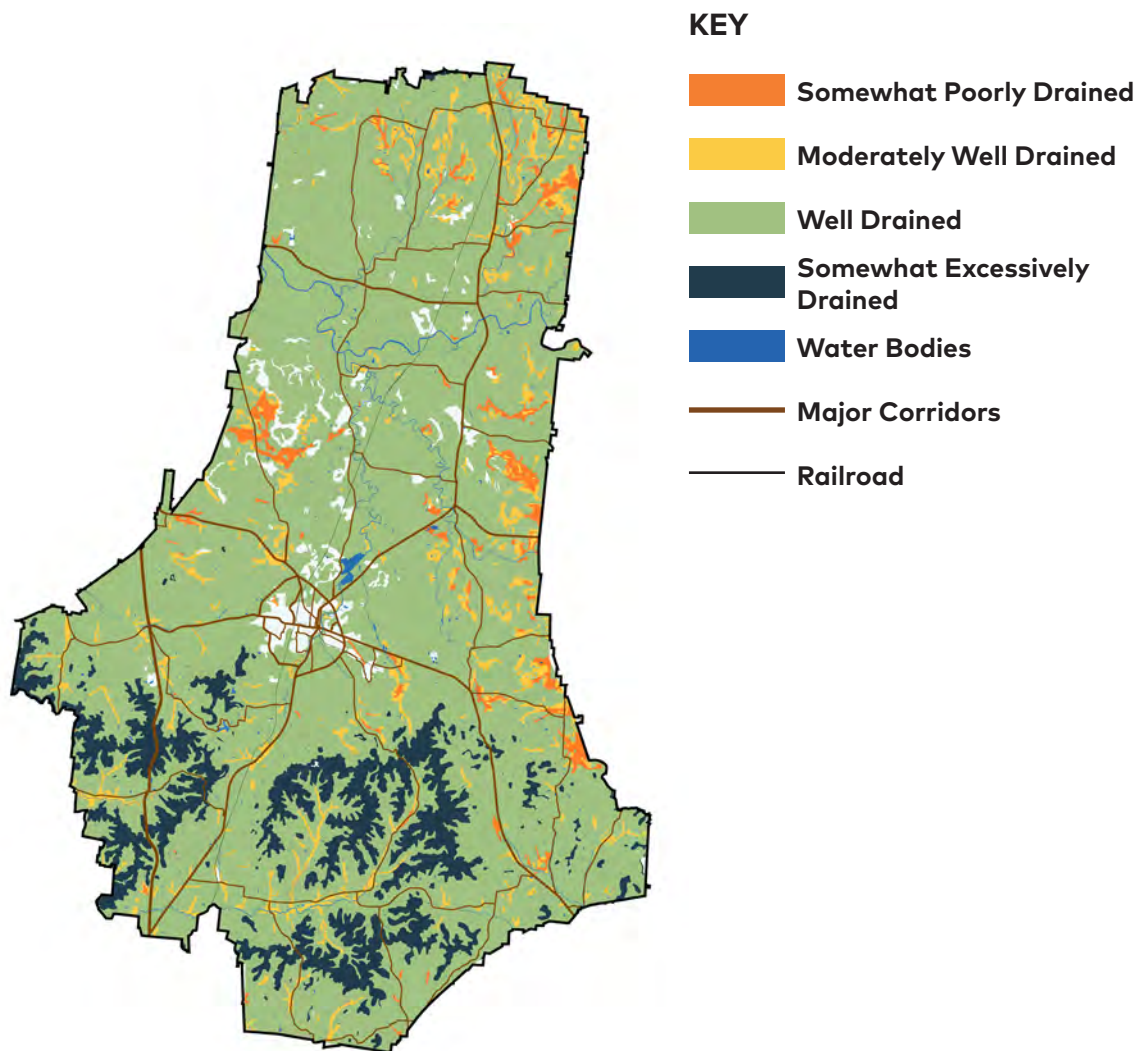
Marshall County lies at the southern portion of Tennessee's central basin. Gentle slopes arising out of the Duck River watershed encompass approximately two-thirds of the county. The lower third of the county comprises rolling hills leading to the southern area of the highland rim. This is part of the reason more development has occurred in the central and northern portions of the county.

NATURAL ENVIRONMENT • WATERBODIES AND FLOOD HAZARD



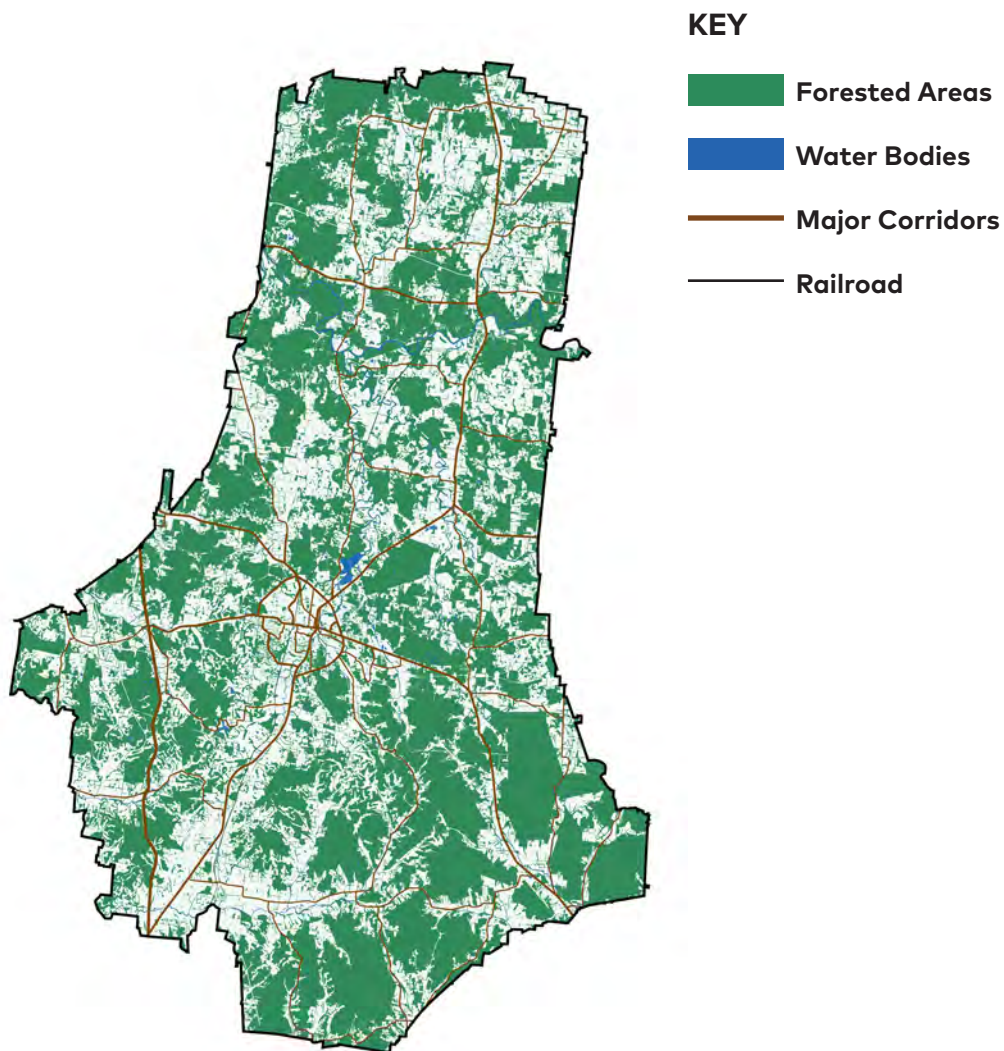
The key waterbody in Marshall County is the Duck River. The river extends approximately 16 miles east-west through the northern portion of the county and serves as a vital functional and recreational resource for the region. Other important tributaries include Big Rock Creek and smaller tributaries such as East Rock, Belfast, Richland, Collins, Sanders, and Corn Creeks. Flood hazard areas are primarily associated with the Duck River, Big Rock Creek, and East Rock Creek.

NATURAL ENVIRONMENT • SOILS



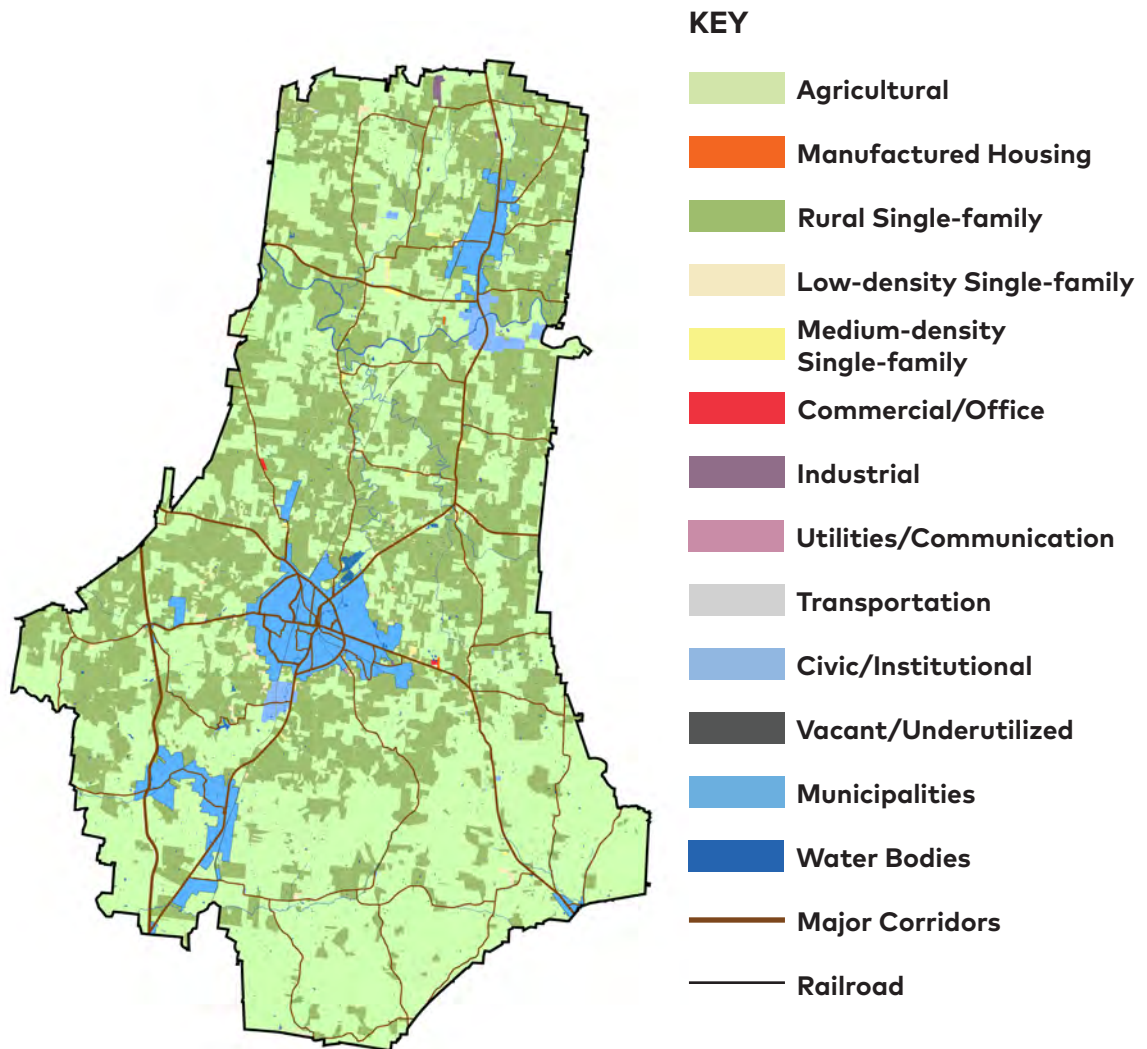
The majority of the soils in Marshall County are considered to be well-draining. This type of soil is useful for septic systems, stormwater runoff, and, particularly, agriculture. The county does contain some poorly-drained soils, or wet soils, in the eastern and western central portions of the county. In the hilly southern parts of the county, the steep topography creates excessively drained soils. This contributes to the sparse development in the south portion of the county.

NATURAL ENVIRONMENT • FORESTED AREAS



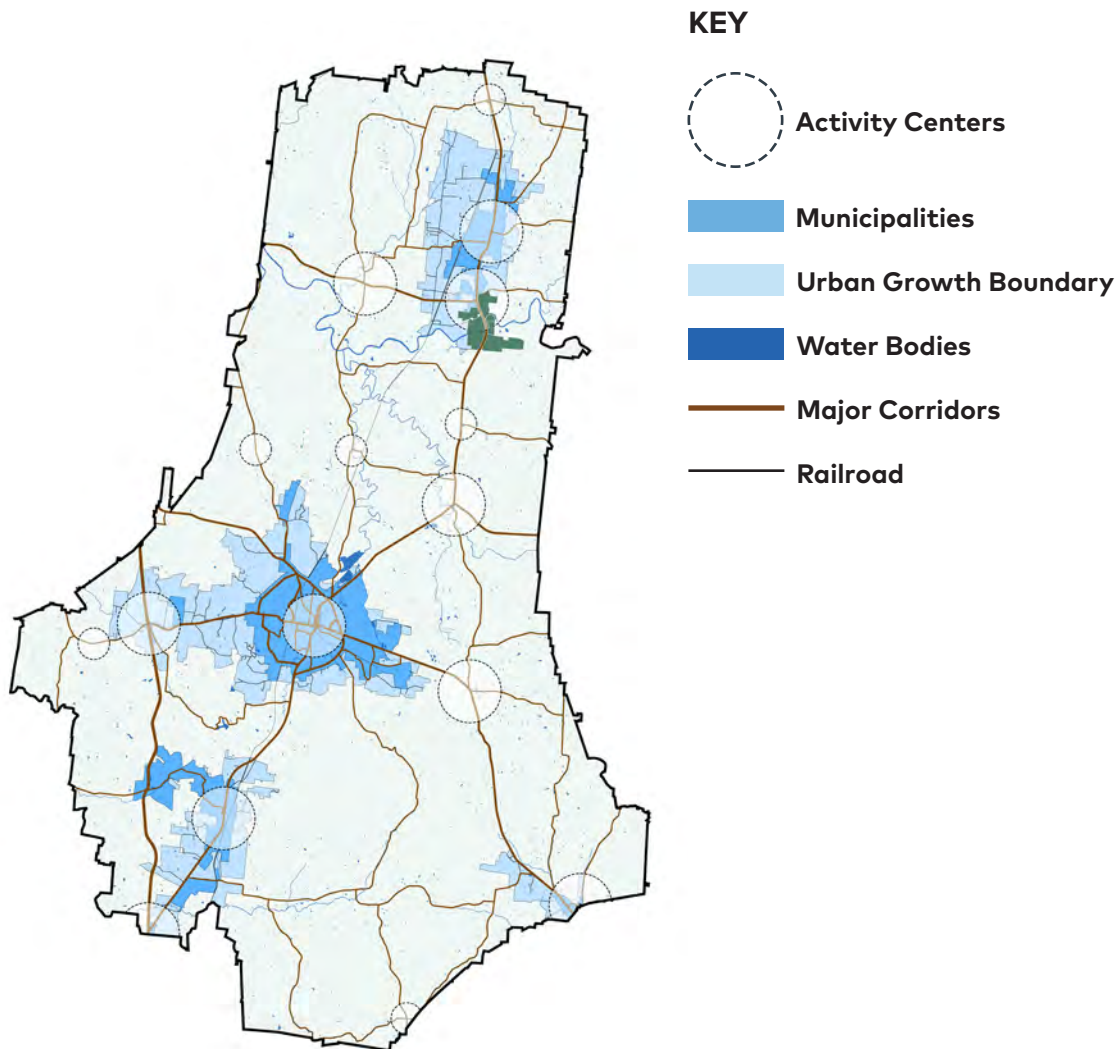
Marshall County is fortunate to contain a large expanse of forested area or tree coverage. This tree coverage is a crucial contributor to the rural character of the county. Preserving forested areas helps to balance more urbanized areas where pavement is prevalent. Trees improve air quality by filtering pollutants, reduce erosion by limited stormwater runoff, and support wildlife.

BUILT ENVIRONMENT • CURRENT LAND USE



Outside of the municipalities, agriculture and rural residential are the primary land uses in the county and along its corridors. There are small nodes of commercial use in the form of corner stores and convenience markets at several crossroads across the county and slightly larger commercial uses, such as Dollar General stores, in the Belfast and Farmington communities. Interstate exits 22 and 32 contain some interchange commercial uses—exit 22 more so than exit 32. There are a few low-density single-family neighborhoods in the northern portion of the county. Small scale industrial-type uses are scattered throughout the county, with a concentration of these uses along Highway 431 near Lewisburg’s industrial park.

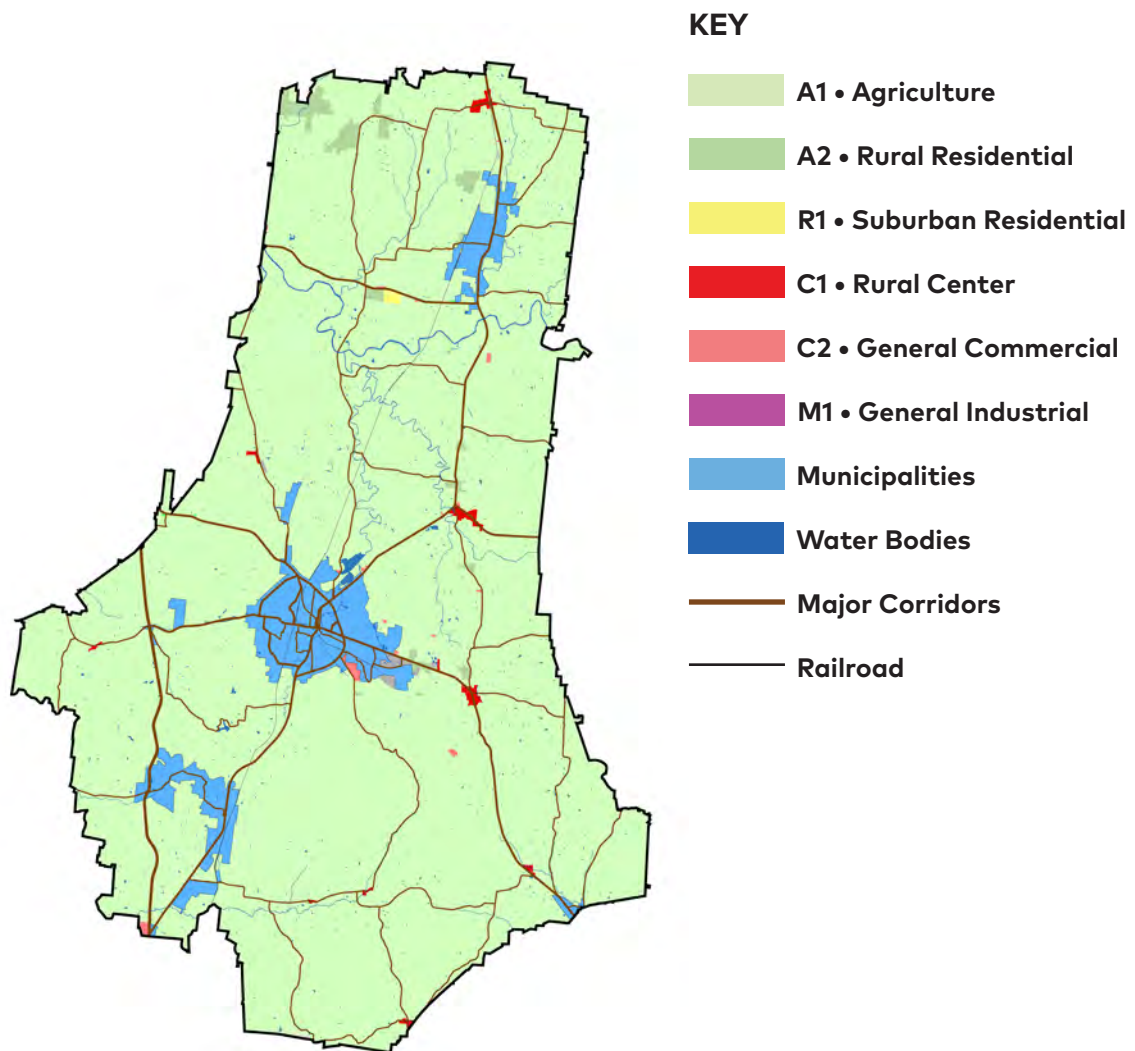
BUILT ENVIRONMENT • ACTIVITY CENTERS & GROWTH BOUNDARIES



Marshall County's corridors have avoided much of the commercial sprawl that characterizes portions of the county's cities, such as Lewisburg and Chapel Hill. Beyond the interchanges, development is primarily concentrated at key intersections along the corridors, but these "centers" are not all the same. They range from several small "crossroads" type centers to the downtowns within the county's cities and two mid-sized centers in between. Each of these centers has distinct differences in character, and this "hub and spoke" pattern contributes to the rural character of many of the county's corridors.

As part of the 2007 Growth Plan, each municipality established an Urban Growth Boundary (UGB) that identified where each might grow and annex in the future. Of note, Chapel Hill's UGB extends north along Highway 31. Lewisburg's UGB extends primarily to the west along Highway 50 and around the Exit 32 interchange while Cornersville's UGB extends primarily to the south along Highway 31 and around the Exit 22 interchange. Petersburg's UGB extends north along 431. This provides an important indication for how these communities intend to grow.

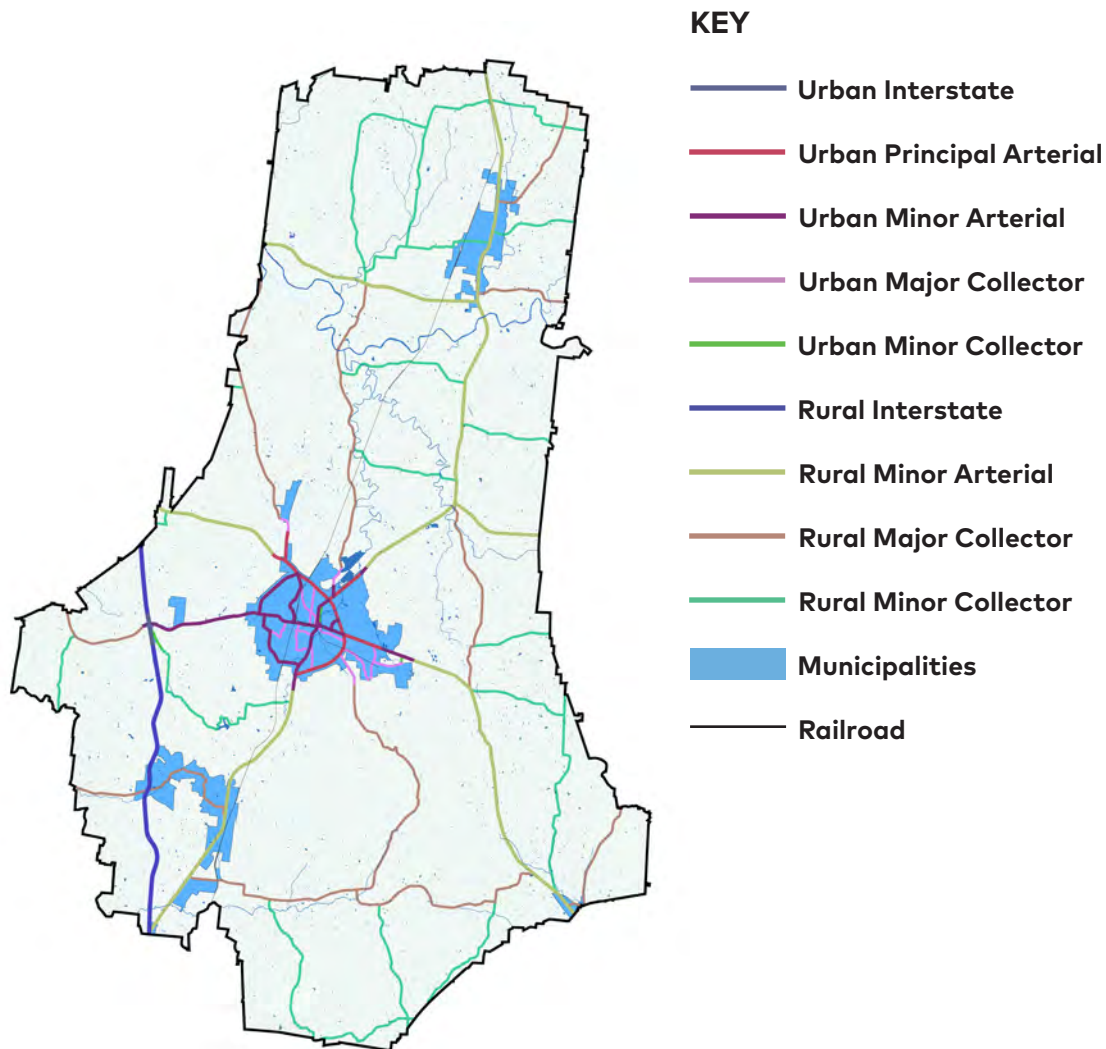
BUILT ENVIRONMENT • ZONING



The county's Zoning Resolution establishes regulations for development, including allowed uses and bulk requirements, according to various districts. The majority of the county—excluding the municipalities—is zoned for agriculture (A1) or rural residential development (A2). There is some low-density single-family residential zoning (R1) in the northern part of the county. Rural Center zoning (C1) is concentrated at several of the identified centers, and General Commercial zoning (C2) is concentrated near Lewisburg and at exit 22. Industrial zoning (M1) is concentrated near Lewisburg's industrial park. All of these designations are generally consistent with current land use patterns.

As typical with many zoning ordinances, the regulations are not as nuanced as the conditions on the ground. For example, setbacks along all corridors are the same despite the differences in character. Likewise, modern ordinances include additional community-driven design standards for development. While Marshall County's zoning has some design standards, they are scattered throughout the document, and some are vague. There is an opportunity to address these shortcomings as part of this plan.

BUILT ENVIRONMENT • TRANSPORTATION

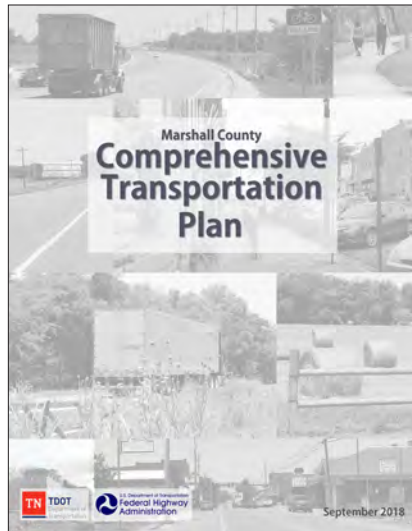


Marshall County's existing transportation system is well-documented in the 2018 Comprehensive Transportation Plan. The above diagram identifies the functional classification of the corridors that are the focus of this plan. Functional classification indicates a street's importance in the transportation network hierarchy and is determined primarily by the volume of traffic, the development it serves, and the areas it connects. The classification of Marshall County's key corridors includes interstates, arterials, and collectors. Arterials include high-volume urban corridors such as Highways 431, 31, 50, 99, 373, and Ellington Parkway. The remaining corridors on this map are collector roads intended to connect local streets (not shown) to the arterial streets. All of the county's centers of activity are along these roadways. The design of these roadways will have a direct impact on the development that occurs along them.

It should also be noted that U.S. Bicycle Route 23, which runs from Kentucky to Alabama comes through Marshall County. The route extends north/south through the center of the County along scenic thoroughfares such as Wilson School Rd., Verona-Caney Rd., Yell Rd., and John Barnes Rd. to name a few. The route also travels along Ellington Parkway in Lewisburg and includes a Henry Horton spur along 99 and 31A to connect to the state park. Portions of this U.S. Bicycle Route pass through the County's established activity centers.

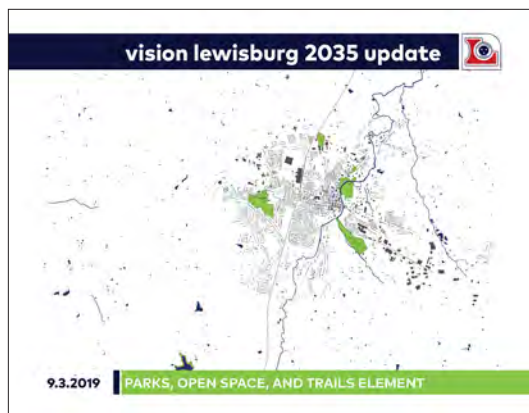
PREVIOUS PLANNING EFFORTS

As part of the Background Analysis, previous plans and studies were reviewed and relevant information and recommendations formed part of the foundation for this plan.



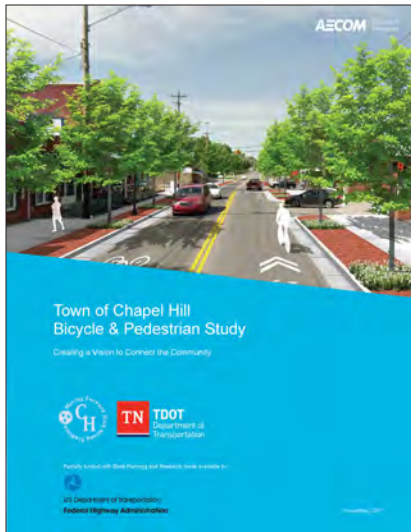
MARSHALL COUNTY COMPREHENSIVE TRANSPORTATION PLAN

As mentioned under “Plan Purpose” at the beginning of this document the Marshall County Corridors Plan is intended to be a companion to the County’s 2018 Comprehensive Transportation Plan. The Transportation Plan is unique in two ways: 1) it takes a “complete streets” approach by focusing on all modes of transportation and not simply highway capacity; and 2) its street cross section recommendations consider current land use and context adjacent to the County’s key corridors. Seven context classifications based on existing and potential future conditions are identified and range from Rural to Downtown. A special classification was identified for interchange areas. Recommended street cross sections are included for each context classification to guide roadway improvements. These street cross sections have been incorporated into the Marshall County Corridors Plan.



VISION LEWISBURG 2035 UPDATE: PARKS, OPEN SPACE, AND TRAILS ELEMENT

In 2019, Lewisburg began an update to its 2013 Vision Plan. This plan is focused on Parks, Open Space, and Trails. The intent is to identify gaps in Lewisburg’s park system, make recommendations for improvements to existing parks, and make recommendations to improve connectivity between parks via the addition of sidewalks, bicycle facilities, and greenways. Some of these recommendations apply to the City’s major corridors, which tie directly to the Marshall County Corridors Plan.



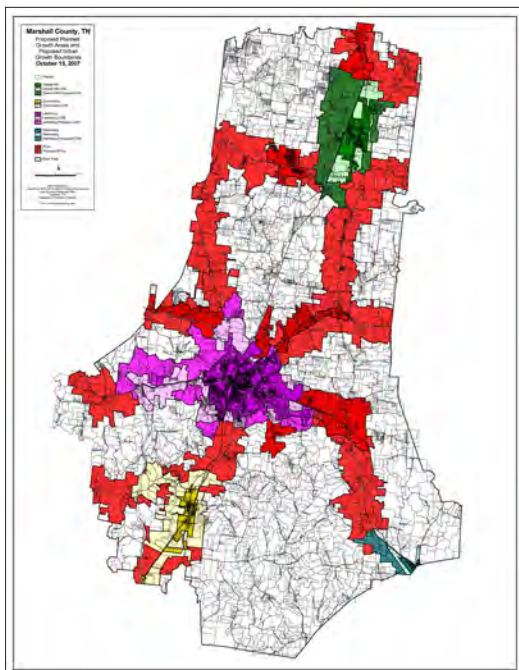
TOWN OF CHAPEL HILL BICYCLE & PEDESTRIAN STUDY

In 2017, a Bicycle and Pedestrian Study was conducted for the Town of Chapel Hill. The plan includes a vision component that identifies desired future development patterns within the City's municipal limits and its Urban Growth Boundary. This vision is the foundation for the study's recommendations on improved bicycle and pedestrian connections within the community. The future development vision for Chapel Hill is considered in this Corridors Plan.



VISION LEWISBURG 2035

In 2013, Lewisburg completed its Vision Lewisburg 2035 Plan. Three key areas are addressed in this plan: Downtown, Corridors, and Parks and Open Space. The City has steadily implemented recommendations from the plan. Design standards for the City's major corridors have been adopted to improve the aesthetic of future development. The design standards resulting from the plan can be a resource and model for improvements to the County's Zoning Resolution.



MARSHALL COUNTY GROWTH PLAN

Marshall County's Growth Plan was last updated in 2007. The Growth Plan established Urban Growth Boundaries for County municipalities as well as Planned Growth Areas (PGA) and areas to intended to remain rural. The PGA were applied within one-half mile of all the County's major corridors. This broad application lacked sufficient guidance to concentrate development at existing activity centers, but did acknowledge that such centers exist. While the plan is significantly out of date and needs to be revisited, some of its recommendations with regard to "smart growth" and the preservation of rural character can be useful to the Corridors Plan. In fact, the Marshall County Corridors Plan can be considered an evolution, but not a replacement, to the 2007 Growth Plan.

EXISTING MARKET CONDITIONS

The following is an excerpt from Section 1 of the Corridor Retail Market Analysis by the consultant team's economist. Refer to the appendix for the full report.

This section summarizes existing conditions relating to and impacting on the retail market in Marshall County. An economic overview provides context for growth of Marshall County and of its local market base. The overall retail market conditions are summarized, in terms of inventory, market indicators, the existing retail business mix, and physical characteristics of the county's retail business environment. Descriptions of the business mix and retail business environment in each of the county's commercial corridors (and Downtown Lewisburg) are also provided. These conditions were assessed based on information collected through field reconnaissance and site assessment, interviews with area brokers and businesses, a building-by-building inventory, and data generated through the County Assessor's office.

ECONOMIC OVERVIEW

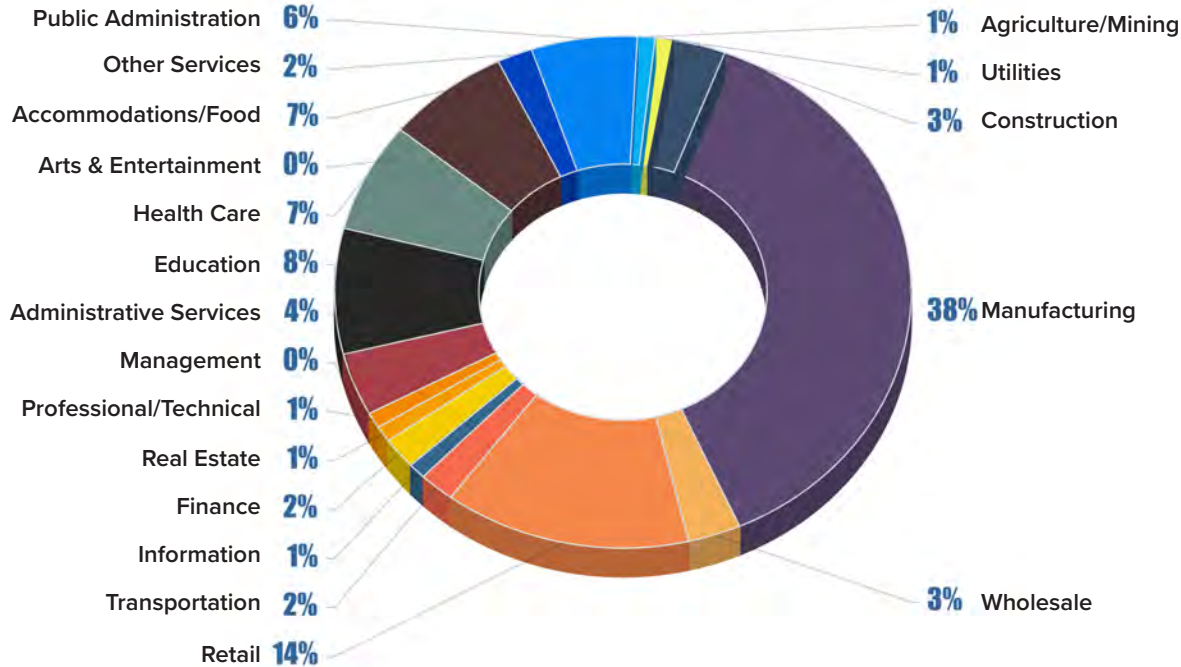
Marshall is a county in transition. While the county still retains its rural Middle Tennessee agricultural character, northern portions of the county now support an emerging suburban

commuter node. The county has seen consistent population growth of about 4,000 to 5,000 people per decade, to an estimated total of 34,375 according to the Census Bureau's 2019 American Community Survey. But there is a growing influx of commuters as well as retirees from other parts of the country.

The Census Bureau now defines Marshall County as part of the Lewisburg Micropolitan Area and as part of the Consolidated Nashville-Davidson-Franklin-Murfreesboro Metropolitan Statistical Area (CMSA). The Nashville CMSA has a population in excess of 2.1 million and covers 15 counties in Middle Tennessee. This metropolitan area has been adding about 35,000 people each of the last several years, roughly equivalent to adding the entire population of Marshall County each year.



MARSHALL COUNTY ECONOMIC BASE (2018)



Sources: U.S. Bureau of the Census and Randall Gross / Development Economics

Marshall County had a total of about 9,500 jobs in 2018. The county's employment base has long been dominated by manufacturing, which still accounts for nearly 4 out of every 10 jobs in the county. Retail trade is also an important employer, generating about 14% of all jobs. Other key employers include education (8%), health care (7%), accommodation & food service (7%), and public administration (6%).

The county was severely impacted by several large closures and the Great Recession of 2008-09, losing more than one-third of its job base. Nearly all of this loss was concentrated in the manufacturing sector, where Marshall County's employment fell from 5,831 in 2002 to just 2,253 by 2010. Several other industries, including retail trade, have seen increasing employment since 2002. Much of that growth has been spurred by continued residential development, with the addition of new households increasing demand for retail goods and services in the local economy. Tourism to Henry Horton State Park and other sites also helps spur demand for retail and restaurants in the county.

By 2018, the county had regained 26% of the jobs it had lost in the previous decade, including a growing number in the manufacturing sector. Employment in that sector increased by more than 1,300 to 3,577. Still, employment in the sector is far from its previous peak. Regardless (or despite) of this recovery, more than 70% of Lewisburg's working adults commute out of the county, with about 50% commuting into the Nashville MSA. Marshall County's at-place employment trends are summarized in the Appendix of this report.

OVERALL RETAIL MARKET CONDITIONS

Information was collected and analyzed on overall retail market conditions for Marshall County as noted previously. Key findings from analysis of this information is provided below.

Inventory

The building-by-building inventory determined that Marshall County has a total of about 1,370,000 square feet of retail/commercial

space and 272 retail businesses. This square footage is equivalent to one super-regional shopping mall. For example, Cool Springs Galleria in Williamson County is just slightly smaller, at 1,141,685 square feet.



The total retail area for Marshall County is similar to the area of Cool Springs Galleria in Franklin.

Market Indicators

There are no commercial brokers in the region that track Marshall County's retail real estate market. So, market indicators like occupancy, class, and age of commercial building stock had to be established based on the inventory information built from the "ground-up." Information from rents was gleaned from commercial listings and individual realtors.

Occupancy. Total vacancy is just over 14.0%, which is significantly higher than one would find in a "healthy" retail real estate market where 5.0% vacancy would be considered the norm. That being said, a significant share of the county's retail vacancy is concentrated in a few large spaces in strip centers, some of which were vacated by chains like Goody's due to company-wide failures unrelated to the local market. There is also a large number of vacant gas stations.

Rents. Marshall County rents range wildly based on location, building conditions, and other factors. There is insufficient data to determine the average market rent. However, relatively new well-located space on the Bypass, such as in Governor's Plaza, rents for \$15.00 per square foot.

Sales. Marshall County had total retail sales of \$314.7 million in 2017, according to the Census of Retail Trade. Based on the inventory, these totals would yield average sales of about \$230 per square foot. However, this number may be under-estimated, given that it was generated for a Census base of 103 establishments and the inventory completed in 2020 for this market study identified and verified a total of 272 retail businesses.

Existing Retail Business Mix

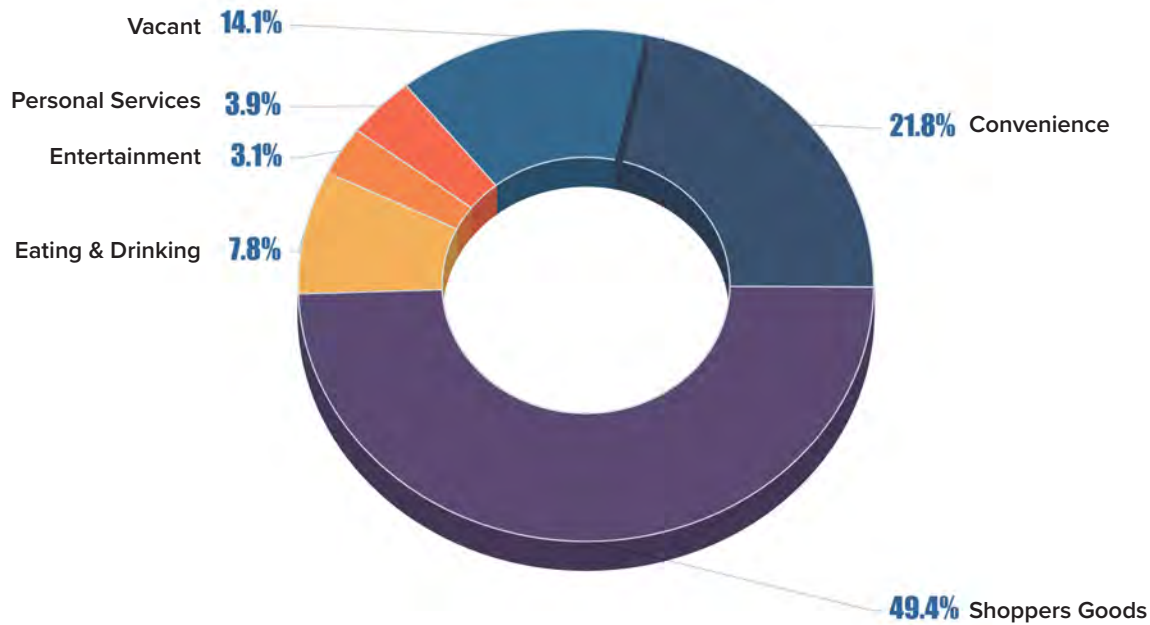
Based on field reconnaissance and inventory, almost one-half of retail businesses in Marshall County would be classified as Shoppers Goods stores, meaning that they sell goods for consumers who comparison shop such as for apparel, furniture, automobiles, toys, or artwork. The overall retail business mix is summarized in the chart on the next page.

About 22% of Marshall County retail businesses would be classified as Convenience Goods; they sell products for immediate consumption and are conveniently located. About 7.8% of retail/commercial space is used for restaurants and drinking establishments, 3.9% for personal service establishments (e.g., hair and nail salons), and 3.1% for entertainment venues.

In the appendix of this plan, there is a table (Table 2) that shows in more detail how this space is disaggregated by type of retail establishment. The table indicates, for example, that there are three grocery stores with a total of 102,500 square feet in the county's commercial corridors. The table indicates a relatively large number of gas stations (28, with a total of nearly 100,000 square feet), tobacco shops (8, with 15,000 square feet), general merchandise dollar stores (14, 140,000 square feet), used merchandise & antiques stores (13, with 80,000 square feet), and auto parts businesses (9, with 44,000 square feet).

At the same token, there are relatively few (or out-right gaps in the supply of) specialty food stores (0, like bakeries, ethnic food markets, etc.), home centers (only two small suppliers), book and music stores (0), and various types

MARSHALL COUNTY RETAIL BUSINESS SPACE BY PRIMARY CATEGORY (2020)



Sources: Marshall County Assessor, Area Businesses, Brokers, and Randall Gross / Development Economics

of specialty stores including gift shops, toy & game stores, luggage/leather stores, office supply businesses, sporting goods stores (beyond gun stores), and snack or coffee shops (0, like Starbucks).

Physical Characteristics

Field reconnaissance and selected data were used to identify physical characteristics or relating factors impacting on the retail market in Marshall County. Such factors include traffic and exposure, corridor identity and naming, gateways and branding, and retail business space.

Location. Marshall County is located in south central Middle Tennessee. As noted before, it is defined statistically as the Lewisburg Micropolitan Area and forms part of the Nashville CMSA. Lewisburg is located about 56 miles or 54 minutes (in normal driving conditions) from Downtown Nashville and 41 miles (41 minutes) from Cool Springs. But Chapel Hill is located only about 31 miles (36 minutes) from Cool Springs and 22 miles (28 minutes) from the commercial heart of Spring Hill. Proximity to

large commercial nodes in a more economically-integrated region has created competition to Marshall County's traditional downtowns and corridor retail businesses, especially as more local residents commute elsewhere for work.

Traffic and Exposure. Marshall County has excellent accessibility and exposure to Interstate 65, which forms a north-south corridor connecting the Chicago region down to Nashville and south from Marshall County to Birmingham. Further, Marshall County has several access points along I-65, near Franklin Pike (average daily traffic count of 27,567), Mooresville Pike (27,210). There is also significant traffic along the Bypass and Nashville Pike, the primary north-south highway corridor through the county. The intersection of North Ellington Parkway at Nashville Pike has traffic counts of 17,362.

Corridor Identity and Naming. There is confusion for tourists and for marketing and branding related to the naming of highway corridors throughout Marshall County. For example, US31A merges with US431 and TN11 to become



The County's corridors suffer from a range of minimal or confusing wayfinding signage to excessive commercial signage.

Ellington Parkway, also known as “The Bypass.” East Commerce Street is US431 Business, which becomes Fayetteville Highway. US31A (TN11) South is variously known as Pulaski Highway, Lewisburg Highway, Sam Davis Highway, and Cornersville Highway, probably because of all of the destinations reached by this road from different parts of the county. Second Avenue North is US31A (North), which is also known as Nashville Highway, Horton Highway, Sam Davis Highway (North), and Verona Road. For the purposes of tourism marketing and branding, not to mention simplicity sake, it may be good to better coordinate signage and branding.

Design and Branding. Linked with the naming challenge is the general lack of branding in signage and gateways that could help in marketing the county for tourism and destination shopping. Currently, signage consists of basic standard green signs. Municipalities in the county lack streetscape, signage controls, and pedestrian accommodation that improve corridor aesthetics and enhance the retail experience.

Retail Buildings. The county’s retail infrastructure is characterized by traditional and historic downtown architecture, contrasted with standard franchise formats in the various corridors. Buildings are in generally good condition, although there may be a need for restoration of more of the historic and vintage buildings to support destination retail activities.

COMMERCIAL CORRIDORS

Detailed reconnaissance, inventory, and analysis was conducted for each of the county’s main highway corridors in order to inform the corridor planning process and understand the market dynamics within these corridors and sub-markets. A description of existing market conditions is provided below for each of the main commercial corridors. For the sake of simplicity, each corridor is identified by their destination (e.g., “Mooresville” or “Nashville”).

Mooresville Highway (SR373)

Exit 32 provides the closest interstate highway access to Lewisburg, although most commuters traveling south from Nashville will exit further to the north. There is a small highway convenience commercial node at the exit, with limited activity and branding. To the west of the exit are several vacant gas stations. Half-way toward Lewisburg is the I-65 Commerce Park, an economic development engine for the county that has attracted some industrial development. Overall, there is about 127,000 square feet of retail/commercial use within the Mooresville Highway Corridor, with a very high vacancy rate of 22%. Among the locally owned commercial uses in the corridor are a bowling alley, donut shop, and fireworks retailer. Marshall County Plaza is a 95,000 square-foot discount-oriented strip center anchored by a Dirt Cheap store, IGA, and a Dollar General.

Fayetteville Highway (US431)

The Fayetteville Highway Corridor has a total of about 88,000 square feet of retail/commercial use. Vacancy is also relatively high in this corridor, with 17% of space vacant. The merchandise mix includes convenience, general merchandise, and antique store uses. The corridor is anchored by several historic nodes that establish a unique historic character for this part of the county.

Belfast. The middle part of the corridor is anchored by Belfast, a place that “time forgot.” Several historic buildings date back to 1878, making the node one of the oldest and most historic in the county. An historic railroad depot testifies to the community’s heritage, and a small antiques store and a café are among the only operating businesses. Only a new Dollar General franchise store disrupts the historic ambiance of the node.

Petersburg. Petersburg straddles the Lincoln County Line. The central part of the town is characterized by historic architecture but, unlike Belfast, offers more of a traditional downtown square with existing businesses and a building stock including an old theatre that buttress the town’s possible tourism draw. The Petersburg “Pickers and Gridders” meet in this town square, with live music enhancing the town’s opportunities for attracting destination visitors.

Pulaski Highway (US31A-South)

Exit 22 provides additional interstate access to Marshall County. This node offers gas, convenience, adult entertainment, and personal service uses straddling Giles County. Overall, the corridor has about 116,000 square feet of retail/commercial space and a very high vacancy rate of 23%. Exit 22 is perhaps best known as the location of The Tennessean Truck Plaza, which is among the most visible and well-marketed retail businesses in Marshall County.

Cornersville. The small town of Cornersville forms a hub in this corridor for southwest Marshall County. Cornersville has several historic buildings and also celebrates its musical heritage through the Briar Patch Opry, with live



From top to bottom: Historic buildings in Belfast; Whittler's Park in Downtown Cornersville along Hwy 31A; Historic buildings in Downtown Petersburg.

music and dancing. Cornersville has a total of about 50,000 square feet of commercial building space.

Nashville Highway (US31A-North)

Nashville Highway functions as the transportation “spine” of Marshall County, covering the length of the county from north to south and connecting the county’s two largest towns. The county’s largest visitor attraction, Henry Horton State Park, is also located in this corridor, bring-

ing 700,000 visitors per year and opportunities for commercial spin-off.

The corridor has a total of about 280,000 square feet of retail and commercial use, with a moderately high 11% vacancy rate. The corridor offers a somewhat broader and more diverse retail business mix than others in the county, with groceries, hardware stores, the Lewisburg Flea Market, gas and convenience stores, general merchandise stores, antiques, auto dealerships, and a variety of restaurants. Among the diverse restaurants located in the corridor are Soul Train, Huddle House, Yamato, Las Fiestas, Mopey's, and Country Diner.

Chapel Hill. The county's second largest town and a hub for residential development, is situated along this corridor. The town is experiencing "growing pains," as it balances the amenities of a traditional small-town lifestyle with suburban residential development and increased traffic congestion. The small historic downtown area offers boutique, flower shop, and antique stores, as well as auto parts, tanning, and liquor businesses.

Downtown Chapel Hill has become an increasingly congested node as commuter traffic is funneled through the historic town in route to Spring Hill, Cool Springs, and Nashville. More suburban commercial development has occurred on the southern end of the town, surrounding Brook's Grocery (formerly Rex's), although new residential development has mainly occurred to the northeast and west of Chapel Hill. Situating commercial development at the opposite end of a town center from new residential development may compound problems with traffic congestion in the corridor.

The Bypass (US31A / US431)

The Bypass (Ellington Parkway) comprises the major commercial corridor for Marshall County, generating a significant share of the county's retail sales and tax revenue. The corridor has more than 630,000 square feet of retail and commercial use, or nearly one-half of all retail business space in the county. This commercial activity complements and benefits from the institutional base in the corridor, anchored by Marshall Medical Center, Columbia State Com-



Clockwise from above: Henry Horton State Park draws 700,000 visitors each year; Historic buildings in the core of Downtown Chapel Hill; One of the busiest traffic spots along Ellington Parkway is where it intersects Nashville Highway.

munity College, and nearby Marshall County High School; as well as from hotels, Jones Field, and other key drivers.

Major retail anchors and clusters in this corridor include the following, all of which draw traffic from throughout the county and beyond. Walmart is often a destination that draws traffic from neighboring counties that may not have access to the store. However, all of the county seats in surrounding counties do have that access, so the destination draw and sales “inflow” generated by Walmart to Marshall County is minimized.

- » Walmart (155,000sf)
- » Kroger (est. 55,000sf)
- » The Acres Shopping Center (130,000sf)
- » Parkway Shoppes (56,000sf)
- » Auto Dealerships
- » 15 “Fast-Food” Restaurants

The Bypass has both the highest commercial traffic and (not-coincidentally), the lowest vacancy rate in Marshall County. But vacancy is still higher than acceptable levels, at 10%. The overall aesthetics and pedestrian environment on The Bypass are of a marginal quality but are consistent with (and indistinguishable from) commercial corridors throughout the country. There is significant misallocation and under-utilization of land, resulting in missed opportunities for maximizing value and fiscal returns to Marshall County.

Downtown Lewisburg

While not technically a “corridor,” Downtown Lewisburg is nevertheless the hub for the corridor “spokes” that radiate throughout the county. All of Marshall County’s major corridors either converge in Downtown Lewisburg or form a bypass around it. Downtown Lewisburg is also home to County Government and is the historic center of the largest city in the county, so its influence on the retail market is substantial.

Downtown Lewisburg has a total of 135,000 square feet of retail/commercial space, ranking it as the third largest commercial “corridor” in the county after The Bypass and Nashville High-

way. Vacancy is relatively high, at 21%, but unlike the highway corridors, vacancy is dispersed in a number of smaller buildings and storefronts rather than being concentrated in one or two large chain “boxes.”

The Downtown tenant mix includes a pharmacy, furniture stores, apparel stores, antiques, and personal services. The Downtown area is lacking, however, in dining and entertainment – other than the Marshall County Community Theater, an important anchor. The Downtown area has beautiful historic architecture and provides a pedestrian-friendly, walk-able environment for shoppers.



Downtown Lewisburg has a quaint town square with the beautiful Marshall County Courthouse in the middle of it. As the County seat, it is the largest downtown of the four municipalities. Streetscape improvements contribute to a walkable environment, but, other than the theater, it lacks food and entertainment that would make it a destination beyond county business.

RETAIL DEMAND AND CORRIDOR POTENTIALS

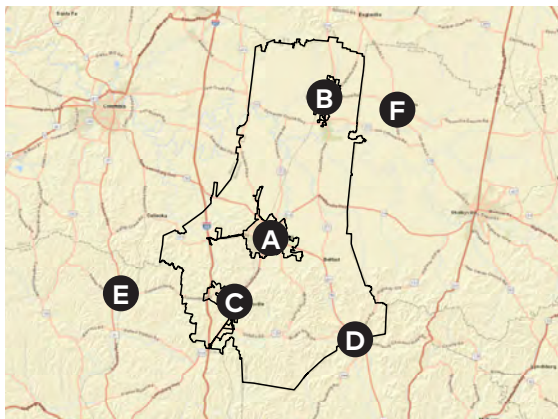
The following is an excerpt from Sections 2 and 3 of the Corridor Retail Market Analysis by the consultant team's economist. Refer to the appendix for the full report.

RETAIL DEMAND

An analysis of current and future retail demand was conducted for Marshall County. Findings from this analysis were generated based on an assessment of household demand and tourism-generated demand for retail goods and services. Household trade areas were determined for the county. Demographic trends and forecasts were analyzed for those trade areas and used as the basis for forecasting retail expenditure potentials. Tourism flow was also examined for Marshall County, with tourism retail expenditures also forecasted. Findings from these analyses are summarized below.

RETAIL TRADE AREAS

Marshall County is a broad geographic area with multiple retail nodes and commercial corridors, each of which draws consumers from different directions. As a result, the trade areas were defined based on the location of the county's nodes or sub-markets.



MARSHALL COUNTY TRADE AREAS

- | | |
|-----------------------|---------------------|
| A Lewisburg | D Petersburg |
| B Chapel Hill | E Lynnville |
| C Cornersville | F Unionville |

The sub-markets that draw consumers for Marshall County businesses include Lewisburg (Trade Area "A"), Chapel Hill ("B"), Cornersville ("C"), Petersburg ("D"), Lynnville ("E") and Unionville ("F"). The latter two nodes are not located in Marshall County but their trade areas overlap with the county and provide a source of consumer support to Marshall County businesses. Because of competition from other nodes in surrounding counties, Marshall County's overall trade area (the composite of these six sub-markets) does not extend far into surrounding areas with the exception of Lynnville and Unionville. Overall, the trade areas represent about 75 to 80% of all trade that would be generated to Marshall County retailers, with the remainder generated from tourists, commuters, and other traffic from outside of the county including travelers along I-65.

DEMOGRAPHIC ANALYSIS

Marshall County had a total 2020 estimated population of 34,558, according to Claritas, Inc., a national marketing database company whose demographic data is used as the basis for the Nielsen TV panels. The county's population has increased by 3,941 or 12.9% since 2010, based on the Claritas estimates. The county's household base, which forms the basis for retail expenditures, increased by 1,575 (13.3%) to 13,425. A faster increase in households than in population indicates a declining average household size. A table illustrating demographic trends in key factors for each of the sub-markets can be found in the full Market Analysis (p. 14) in Appendix A of this document. Key findings are summarized below.

The county's urban areas have seen the fastest growth over the past ten years, according to the Census and Claritas data. Chapel Hill is growing fastest, with a 24.2% increase in population and 23.7% increase in households over the past ten years. Chapel Hill population and households stood at about 8,400 and 3,100, respectively, in 2020. An influx of higher-income households from other areas has spurred significant changes in Chapel Hill demographics. Household incomes are by far the highest in the county (estimated at \$80,170, compared to a county-wide

average of \$70,100), and are growing fastest, having increased by 49.3% in constant dollars (after adjusting for inflation) since 2010. That 6.2% annual increase in income far outstrips income growth in most other areas of the county. The combination of household and income growth concentrated in Chapel Hill has had a positive impact on retail demand in that area.

Lewisburg has also seen demographic growth since 2010, but at a much more modest pace that aligns with traditional growth patterns in the county. The Lewisburg submarket's population increased by about 2,150 or 10.0% to 23,518. Household incomes also increased by about 10% (adjusting for inflation) but remain lower than in Chapel Hill and the county as a whole, at an average \$52,700. The slowest growth has been in the Lynnville and Unionville submarkets, but both of their nodes lie outside of Marshall County.

Demographic Forecasts

Many of the same demographic growth trends are expected to continue over the next five to seven years. Population and household growth will remain relatively strong, if slightly slower. The annual rate of growth in the trade areas as a whole is projected at about 1.2%, versus the 1.3% annual growth seen in the area between 2010 and 2020. The fastest household growth will again be concentrated in Chapel Hill and, to a lesser extent, Lewisburg. Chapel Hill is expected to grow by 8.9% (adding about 740 residents) by 2025, the Lewisburg area by 5.6% (adding 1,300).

The Cornersville area will grow by nearly 5.0%, adding about 90 to its population, for a total of approximately 1,850. The Petersburg, Lynnville, and Unionville sub-markets will see slower growth than other parts of the trade area.

Incomes are estimated to have fallen during the recession induced by the COVID 19 Pandemic, with business closures, higher unemployment, and business expansion on hold. As the pandemic and its economic impact is expected to subside over the next year, businesses will again begin to reopen and expand, unemploy-

ment will continue to fall, and incomes will gradually begin to rise. Overall, however, incomes will expand at a much slower average rate over the 5-year period to 2025 as they did previously. It is expected that Lewisburg incomes will only increase by about 0.1% (in real terms) over the five year period. Expectations are similar in Petersburg (0.1%) and slightly higher in Cornersville (0.6%). Chapel Hill incomes will again increase the fastest, as newcomers bring higher incomes to the area. The Lynnville submarket is expected to see a decrease in average household incomes over the 5-year period.

TPI AND RETAIL EXPENDITURE POTENTIALS

The key indicators of retail demand, Total Personal Income (TPI) and the share of income spent on retail expenditures, are expected to continue increasing over the next five years in tandem with households and modest income growth. TPI was estimated at \$853 million in 2020, growing by about \$59 million or 6.9% to \$912 million by 2025-26. The Lewisburg submarket has the highest TPI, at \$489.6 million and will add \$29.3 million (6.0%) by 2025. However, Chapel Hill's TPI will grow the fastest (10.3%) due to the combination of high household growth and continued income expansion. The TPI is expected to grow 5.7% in the Cornersville submarket and 3.7% in the Petersburg submarket by 2025. The Lynnville submarket will experience the slowest growth in TPI, about 1.8%. A table illustrating TPI forecasts for each of the sub-markets can be found in the full Market Analysis (p. 17) in Appendix A of this document.

Retail expenditure potentials will total about \$389 million, representing an increase of \$28 million or 7.7% over the five-year period. The largest expenditures will be in groceries, gas, motor vehicles, general merchandise, and restaurants. Each sub-market will capture a respective share of trade area expenditure potential, as discussed in the section that follows.

TOURISM-GENERATED DEMAND

The largest tourism generator in the county is Henry Horton State Park, which attracts about 700,000 people per year. However, many thousands also pass through the county each year along I-65 or in route to major tourist attractions like Jack Daniel's Distillery, located nearby. This analysis has conservatively estimated tourism in the county at about 878,000 visitors per year, including those who stay overnight or stop in the county as part of a trip. Each party of visitors to the county is estimated to spend an average of \$184.42 per trip (including portions in Marshall County and elsewhere), for a total of \$161.9 million per year. Of this amount, about \$47.6 million is spent in restaurants, \$15.9 million on retail trade, and \$8.6 million on entertainment. Again, the county and its corridors capture only a portion of this demand, but there are opportunities to increase capture and expand the sales base.

CORRIDOR POTENTIALS

As noted previously, Marshall County only captures a portion of trade area retail expenditures and tourism sales. The county's retailers must compete within a broader region with economic nodes that are increasingly integrated. Being at the southern rim of a large metropolitan area creates challenges for Marshall County businesses that are competing with other businesses that are located closer into the center of this metropolitan market. On the other hand, Marshall County is the first portion of the market to be approached from the south, thus providing opportunities to capture northbound traffic before sales are deposited in other Nashville-area locations. This section examines each of the county's sub-market potentials within the competitive regional context.

COMPETITIVE FRAMEWORK

As noted above, Marshall County operates within a competitive retail environment. This environment is always shifting due to the changing nature of retail trade and growth in Middle Tennessee. But the COVID 19 Pandemic has accelerated some of these changes, particularly

the shift to online purchasing, which create new challenges to existing and prospective "brick-and-mortar" businesses.

Among the competitive retail nodes in the region are Spring Hill and Columbia, probably the closest major commercial nodes within the commuter shed. Columbia offers an increasingly attractive downtown environment with restaurants and shopping that compete directly with Downtown Lewisburg for specialty goods and dining. Spring Hill offers competitive commercial use along with dining and entertainment that also compete for Marshall County sales.

Towns to the south, west, and east like Shelbyville and Pulaski provide a similar mix of quaint downtown shopping and highway-oriented franchises to compete with Marshall County. Further north are large-scale commercial nodes like Franklin and Cool Springs that again provide that mix of historic, walkable shopping districts as well as suburban malls and chain stores.

LEWISBURG RETAIL POTENTIALS

The market analysis determined that there is an over-supply of retail space in the Lewisburg sub-market. While there is gross demand for about 70,000 square feet of additional retail use, the submarket has an existing inventory of 193,000 square feet of vacant commercial space, yielding an oversupply of 124,000 square feet. Some of the submarket's vacant space is found in a number of smaller spaces in the downtown area, but there are several large "box" stores that, if filled, could easily reduce the "overhang" of vacant space in the submarket. Among these spaces are the 27,800 square-foot Goody's space at The Acres and 20,000 square feet at Marshall County Plaza, accounting for roughly one-third of all of Lewisburg's vacant space.

The over-supply of retail is concentrated in certain uses, including convenience stores, gas stations, and general merchandise ("dollar") stores. Despite the over-supply in these categories, there are other retail categories where there is net demand. For example, there

TABLE 1
SUMMARY DESTINATION RETAIL
POTENTIAL BY USE
LEWISBURG, 2020-2025

TYPE OF GOOD	Gross Demand (SF) 2020	2025	Existing Uses	Warranted Demand
Convenience	188,446	200,156	205,388	(5,232)
Shoppers Goods	514,950	548,674	558,922	(10,248)
Eating/Drinking	118,647	125,511	84,172	41,340
Limited Service	50,047	52,368	39,858	12,509
Full Service	51,676	55,121	42,403	12,718
Entertainment	68,930	71,186	41,906	29,280
Personal Services	48,526	51,650	37,445	14,205
TOTALS:	939,499	997,178	927,964	69,345
Existing Vacant			192,964	
Net New Space				(123,619)
Less Home Center				(70,319)
Note: Assumes pro-active internal/external recruitment				
Sources: Randall Gross / Development Economics				

is net demand for a home center store (e.g., Lowe's, Home Depot), but this demand is not sufficient to support the required floor plate for these chains at this time. Details regarding Lewisburg's retail potential within specific retail business categories is located in the appendix of the full Market Analysis at the end of this plan (Table A-3, p. 35).

Business Opportunities

Based on the market analysis, several opportunities are recommended for strengthening the existing business mix and recruiting new retailers to fill vacant spaces. This recommended mix includes about 100,000 square feet of retail uses, although some of this retail potential could be absorbed by existing stores. For example, Walmart or other existing businesses are likely to absorb at least some of the unmet demand for home center sales.

Much of the Lewisburg submarket's net potential is driven by tourism demand, based on the analysis of potential tourism sales. This analysis assumes that a pro-active marketing strategy would be implemented to attract tourists to downtown Lewisburg and other locations in the county. There is the opportunity for entertain-

ment and drinking establishments in the Lewisburg submarket that could be accommodated downtown as part of a strategy of attracting some of the 500,000 Distillery Trail tourists who travel each year to or from Jack Daniel's Distillery. Similarly, a diverse set of full-service restaurants would be supportable as part of this tourism destination-oriented strategy for capturing sales in Downtown Lewisburg. Other businesses that rely in part on a destination tourism marketing effort include gift/book and toy stores, shoe and accessory stores, and a specialty liquor store. Aside from these, there are additional businesses that help fill a gap in the existing supply, including specialty food stores, coffee shops, and home furnishings stores.

TABLE 2
RETAIL BUSINESS OPPORTUNITIES
LEWISBURG

TYPE OF BUSINESS	Square Feet
Home Center (sales absorbed by WalMart)	53,300
Entertainment/Drinking Establishments	22,000
Diverse Full-Service Restaurants (& LS at I-65)	20,000
Personal Services	14,000
Gifts/Books & Music/Toys	13,000
Snack/Coffee Shops	9,700
Specialty Food (Bakeries, etc.)	5,000
Home Furnishings	6,500
Liquor/Wine Store	4,800
Shoes & Accessories	4,100
TOTAL (Less Home Center):	99,100
Sources: Randall Gross / Development Economics	

CHAPEL HILL RETAIL POTENTIALS

The Chapel Hill submarket is growing rapidly, in terms of new household base and incomes, fueling rapid growth in demand for retail, restaurants, entertainment, and services. This submarket has market potential for another 220,000 to 260,000 square feet of retail and commercial space. Unlike Lewisburg, Chapel Hill is not as burdened by vacancy, so much of the growth in demand would be accommodated through new development.

TABLE 3
SUMMARY DESTINATION RETAIL
POTENTIAL BY USE
CHAPEL HILL, 2020-2025

Gross Demand (SF)		2025	Existing Uses	Warranted Demand
TYPE OF GOOD	2020			
Convenience	83,056	89,566	35,658	53,908
Shoppers Goods	194,987	210,704	69,282	141,422
Eating/Drinking	49,356	52,079	12,909	39,171
Limited Service	16,414	17,250	4,881	12,370
Full Service	22,965	24,056	8,028	16,028
Entertainment	17,216	17,976	-	17,976
Personal Services	22,247	24,028	7,811	16,217
TOTALS:	366,861	394,354	125,660	268,694
Existing Vacant	5,713			
Net New Space				262,981
If HC in Lewisburg				226,730
Note: Assumes pro-active internal/external recruitment				
Sources: Randall Gross / Development Economics				

Shoppers' goods stores account for about one-half of the potential for retail space in Chapel Hill, followed by convenience stores and eating and drinking establishments. The Home Center demand could also be accommodated in Chapel Hill, although the area does not offer the traffic exposure of Lewisburg's Bypass. A detailed accounting of Chapel Hill's potentials by specific retail business category is found in the appendix of the full Market Analysis at the end of this plan (Table A-4, p. 36).

Recommended Business Mix

There are a number of new retail business opportunities that will arise as the submarket grows over the next five to seven years. A viable business mix of about 118,000 square feet is recommended that accommodates demand within acceptable floor plate considerations for the various types of businesses. Perhaps most important and urgent of these would be a pharmacy, which will be necessary to meet demand for convenience goods and services from a growing household base.

Other business opportunities include restaurants, family entertainment venues, personal

services, apparel & accessory stores, home furnishings, auto supply, toys, pet supplies, hardware and other convenience-oriented businesses. Some of the restaurant demand would be driven from visitors to Henry Horton State Park and sites along the Duck River, which flows through the northern part of the county near Chapel Hill.

TABLE 4
RETAIL BUSINESS OPPORTUNITIES
CHAPEL HILL

TYPE OF BUSINESS	Square Feet
Pharmacy	12,500
Furniture/Home Furnishings	6,000
Apparel	6,600
Jewelry & Accessories	2,200
Restaurants	21,000
Family Entertainment	17,000
Personal Services	15,000
Auto Supply	5,600
Electronics	4,500
Gifts/Hobby/Toys/Books	7,000
Misc. SG-Pet Supplies	4,900
Hardware & Garden	7,000
Gas/Convenience	9,000
TOTAL (Less Home Center):	118,300
Sources: Randall Gross / Development Economics	

CORNERVILLE RETAIL POTENTIALS

Cornersville is expected to capture modest retail growth over the next five to seven years, with potential for about 30,000 square feet. Potentials may be concentrated at Exit 22, including demand for restaurants and auto supply to serve the local and pass-through market. There would be warranted gross demand for about 54,000 square feet, but there is 27,000 square feet of vacant space in this submarket, yielding net demand for 27,700 square feet of new retail space. Cornersville potential is summarized below and detailed by specific type of retail establishment category in the appendix of the full Market Analysis at the end of this plan (Table A-5, p. 37).

**TABLE 5
SUMMARY DESTINATION RETAIL
POTENTIAL BY USE
CORNERSVILLE, 2020-2025**

Gross Demand (SF)		Existing Uses	Warranted Demand
TYPE OF GOOD	2020		
Convenience	46,086	34,447	13,887
Shoppers Goods	47,139	9,384	40,091
Eating/Drinking	14,494	8,254	6,905
Limited Service	7,336	5,035	2,641
Full Service	4,381	3,219	1,835
Entertainment	19,377	27,260	(6,989)
Personal Services	6,750	6,979	122
TOTALS:	133,846	86,324	54,015
Existing Vacant		26,298	
Net New Space			27,717
If HC in Lewisburg			11,999
Note: Assumes pro-active internal/external recruitment			
Sources: Randall Gross / Development Economics			

Recommended Retail Mix

A recommended business mix of about 26,000 square feet is outlined below.

**TABLE 6
RETAIL BUSINESS OPPORTUNITIES
CORNERSVILLE**

TYPE OF BUSINESS	Square Feet
Grocer Sales to Convenience	10,000
Pharmacy/Health	6,300
Liquor/Miscellaneous	7,000
Hardware/Garden	4,500
Auto Supply	2,000
Misc. Shoppers Goods	1,000
Restaurants	3,500
Snack/Beverages	1,500
TOTAL (Less Home Center):	25,800
Sources: Randall Gross / Development Economics	

There is demand for about 10,000 square feet of grocery space forecasted over the next five years in the Cornersville submarket, but it is assumed that this demand will be absorbed by existing convenience stores (through sales of some produce, milk and cheese products)

rather than supporting new grocery store development. If not, then those sales will go to other existing groceries in the county and will eventually help support grocery development in Cornersville itself. As in Chapel Hill, there will be growing demand that could be captured for a pharmacy in Cornersville, along with liquor, hardware and auto supply stores.

PETERSBURG RETAIL POTENTIALS

The market analysis determined that Petersburg has potential for capturing at least 30,000 square feet of retail demand, assuming that there is a pro-active tourism marketing and development effort to draw visitors to Petersburg and the area's heritage sites. This demand would support a full-service destination restaurant with live music entertainment. Also supported would be additional antiques, hobby/toy and game shops and gift-oriented businesses. Petersburg potential is summarized below and detailed by specific type of retail establishment category in the appendix of the full Market Analysis at the end of this plan (Table A-6, p. 38).

**TABLE 7
SUMMARY DESTINATION RETAIL
POTENTIAL BY USE
PETERSBURG, 2020-2025**

Gross Demand (SF)		Existing Uses	Warranted Demand
TYPE OF GOOD	2020		
Convenience	19,166	7,705	12,078
Shoppers Goods	33,477	15,563	20,374
Eating/Drinking	24,566	-	27,154
Limited Service	9,631	-	9,876
Full Service	14,244	-	15,911
Entertainment	8,901	-	9,418
Personal Services	2,287	600	1,787
TOTALS:	88,398	23,868	70,810
Existing Vacant		26,298	
Net New Space			44,512
If HC in Lewisburg			39,736
Note: Assumes pro-active internal/external recruitment			
Sources: Randall Gross / Development Economics			

Recommended Business Mix

Based on the findings of the market analysis, as noted above, a recommended business mix would include additional restaurants with live entertainment as a destination draw for tourism. There is also some ancillary demand that could be captured in Petersburg for pharmacy, personal services, and other businesses in addition to the tourism-oriented businesses mentioned above.

**TABLE 8
RETAIL BUSINESS OPPORTUNITIES
PETERSBURG**

TYPE OF BUSINESS	Square Feet
Convenience Grocer/Pharmacy	4,000
Apparel	1,400
Antiques	5,000
Books/Music	1,100
Gifts/Souvenirs	1,000
Hobby/Toys/Games	1,200
Restaurants w/ Live Music/Entertainment	14,000
Personal Services	1,800
TOTAL (Less Home Center):	29,500
Sources: Randall Gross / Development Economics	

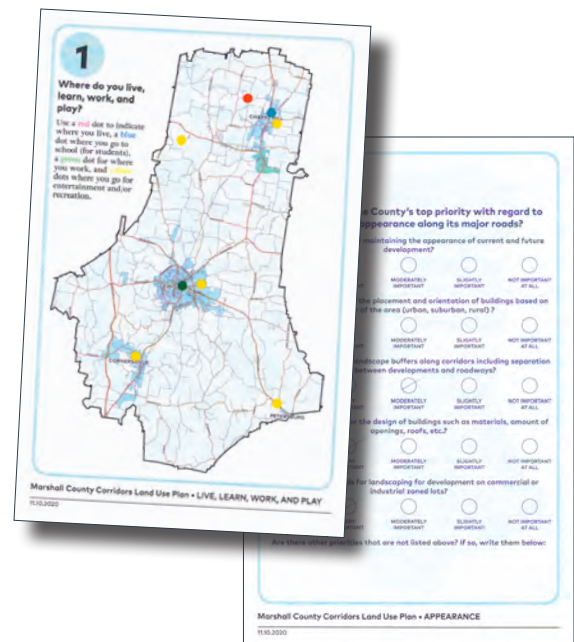
A common thread among the county's submarkets is the opportunity for tourism-oriented retail business development anchored by dining, distilleries, and entertainment. Another opportunity that appears to be common throughout the county is secured by demand for a pharmacy, which could be accommodated at several different locations in the northern, middle, and southern portions of the county.

COMMUNITY ENGAGEMENT SUMMARY

Public input is an essential part of any planning process. Consultants bring expertise and experience, but residents and business owners bring a local perspective to a plan. The community engagement effort for the Marshall County Corridors Plan involved multiple meetings intended to create "feedback loops" where the public has the opportunity to provide input throughout the process. This effort involved numerous public meetings, staff and Planning Commission updates, and workshops. A summary of the community engagement process is below.

PLANNING WORKSHOPS

In mid-November of 2020, the consultant team conducted four workshops to capture the community's ideas for the future of the county's corridors. Due to the COVID-19 pandemic, the public workshops featured a format whereby participants engaged in an individual planning exercise similar to a survey. Participants completed six exercises that sought local perspectives on current conditions and future hopes for major corridors. The first workshop involved the junior Kiwanis Club, where high school seniors from across the county participated. The



team conducted one workshop in the Chapel Hill area and held the other two workshops in Lewisburg at the Recreation Center.

FRAMEWORK PLAN PRESENTATION

In March of 2021, the team presented preliminary concepts for the corridors. Due to COVID-19 restrictions, the meeting was held via Zoom. The results of the Planning Workshops were presented along with the results of the Retail Market Analysis. Additionally, preliminary concepts for land use policy and development character for review and feedback.



DRAFT PLAN PRESENTATION

In April of 2021, the team presented the draft Plan for final public input. As was done for the Framework Plan Presentation, the Draft Plan Presentation was conducted in a virtual format via Zoom. While the presentation included a recap of the purpose, process, and overall plan, there was a particular focus on the strategic recommendations from the retail market analysis, recommendations for changes to the Zoning Resolution to implement the plan, and additional discussion on the interface of the Corridors Plan and the 2018 Comprehensive Transportation Plan.



SOME OF WHAT WE HEARD:

What do you love about Marshall County?

**People/Community
Small town feel
Rural/natural beauty**

What should be the County's priorities related to its corridors?

**Property maintenance standards
(71%)**

**Revisit building placement and
orientation standards (54%)**

Landscape buffer standards (63%)

Building design standards (54%)

Site design standards (60%)

2 | plan recommendations





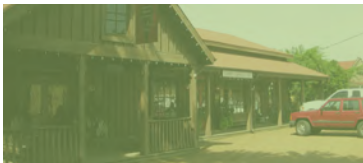
PLANNING PRINCIPLES

Planning principles are a useful tool to aid the evolution of a plan from initial findings and community input to recommendations and strategies. While specific to this effort, the principles are intentionally broad and intended to guide the more detailed aspects of the plan. The following principles were developed after public visioning workshops:

- » Preserve the rural character of Marshall County's corridors by limiting sprawling development.
- » Reinforce Lewisburg, Chapel Hill, Cornersville, and Petersburg as the most important centers within the county including preserving their historic character and heritage and strengthening them as destinations.
- » Preserve Henry Horton State Park as the County's most prized recreational asset and leverage its importance to the mutual benefit of its immediate surroundings.
- » Leverage the Duck River as an important recreational asset connecting Marshall County with surrounding counties and the region.
- » Allow the centers of Farmington and Belfast to grow as rural centers that serve the surrounding population and preserve their historic character and heritage as destinations.
- » Focus efforts on promoting heritage tourism along the 431 corridor to help improve Berlin, Lewisburg, Belfast, and Petersburg within the region.
- » Preserve Marshall County's crossroads communities as important centers serving the most rural regions of the county.
- » Encourage redevelopment of Exits 32 and 22 on I-65 to serve travelers and create gateways into Lewisburg and Cornersville.
- » Preserve the rural character around Exit 27.

"PLACE TYPES" APPROACH

This plan acknowledges that there is no “one size fits all” for the future character of Marshall County’s corridors. This observation was reinforced based on public input received. Development along key corridors should not be a continuous “strip” of development, but rather nodes, or centers, of development at key intersections and locations. These areas range from the corner store at a crossroads to the downtown of established communities, and the character of each Place Type is unique. It should be noted that all of these Place Types exist today; however, some are envisioned to be expanded while others are intended to be preserved. The character of future development—not simply land use or density—is the key to the differentiation between Place Types.



CROSSROADS CENTER

This center type is a small concentration of commercial uses typically at the intersection of two key roads with rural residential around it. Rural in character, the “country store” or modern convenience store typifies this center.



RURAL CENTER

This center type is rural with limited commercial uses, but slightly larger than the Crossroads Center. Instead of a country store, you typically find a larger store, such as Dollar General, that serves the surrounding rural area.



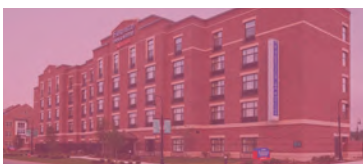
COMMUNITY CENTER

This is a large center typically anchored by a grocery or department store. More commercial uses are in this center type and denser single-family and some multi-family residential surrounds it.



DOWNTOWN

These are the largest activity centers in the County and the heart of their respective municipalities. These areas often feature a mixture of uses in a more urban form.



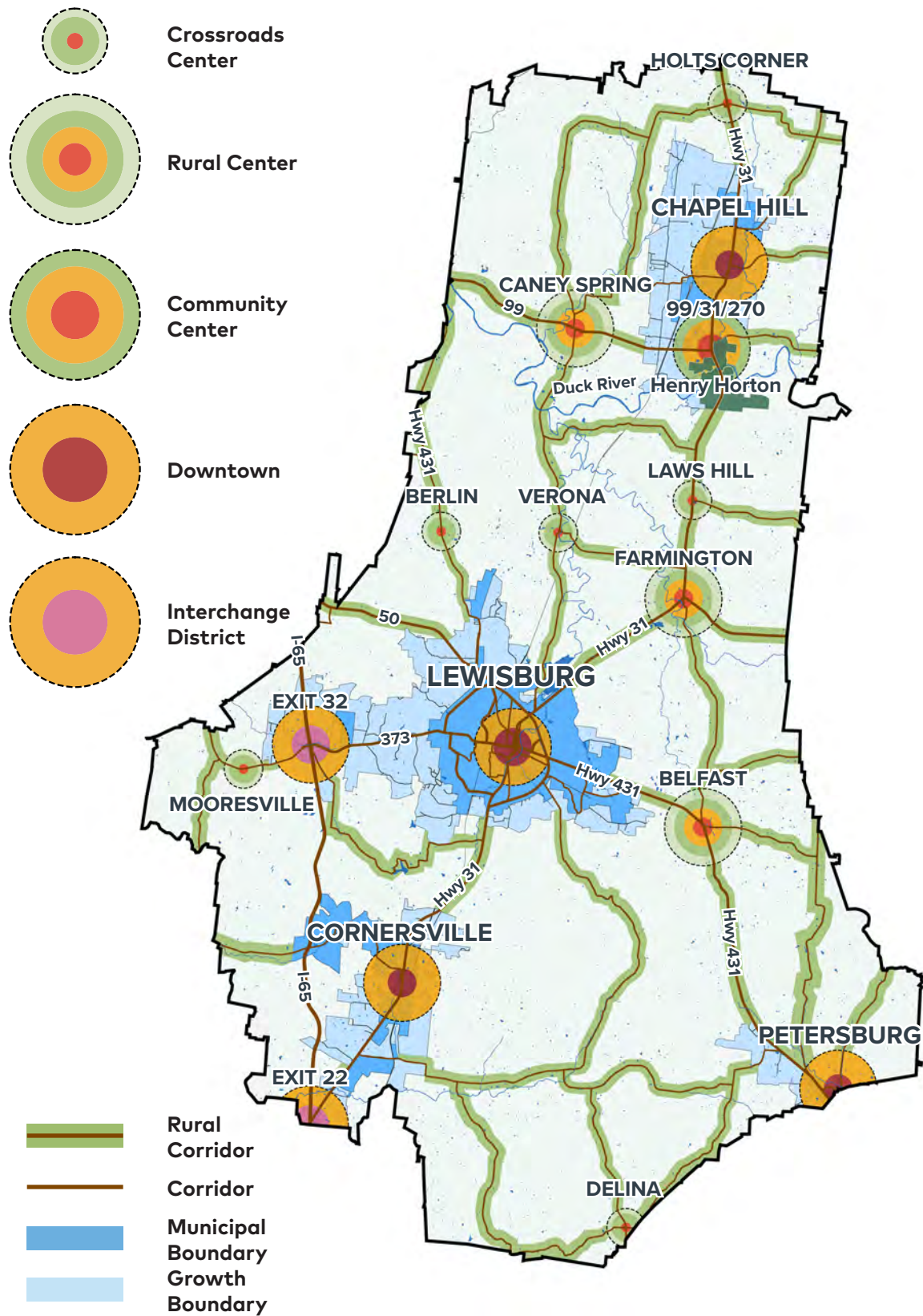
INTERCHANGE DISTRICT

These areas are primarily commercial and serve travelers along I-65. They are largely automobile dominant due to their location. They also form gateways into the County from the interstate.



RURAL CORRIDOR

These are the stretches of rural character between the various activity centers in the County.



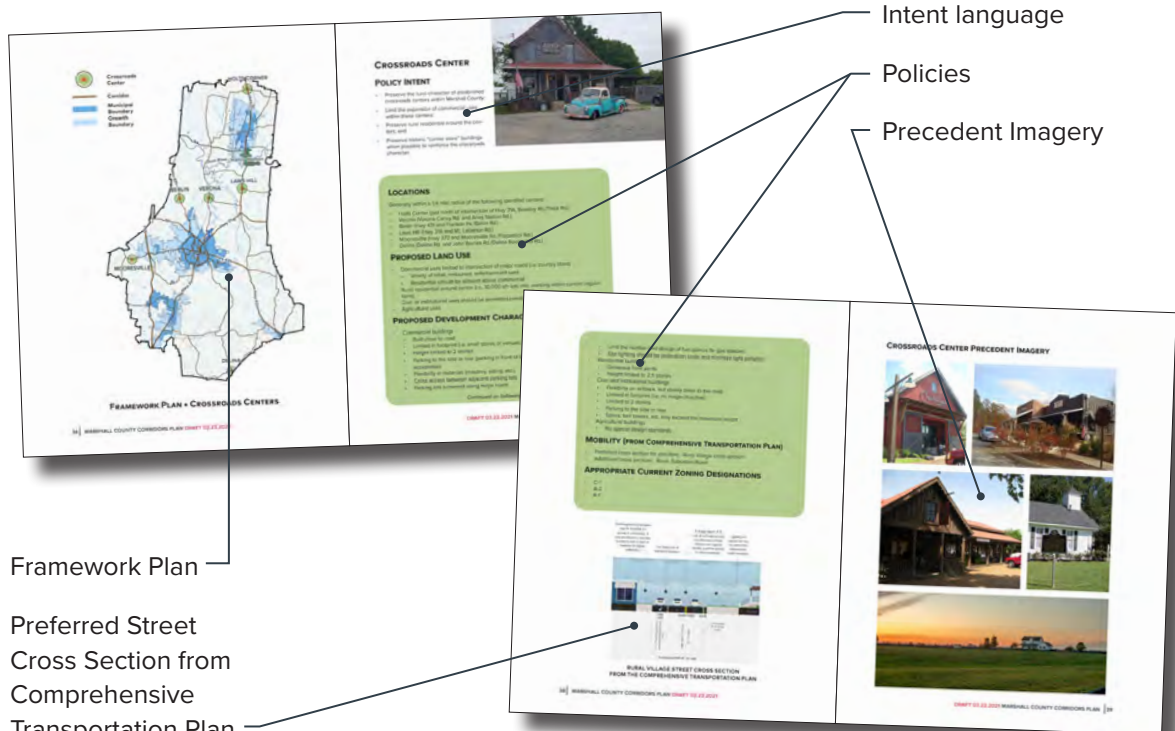
FRAMEWORK PLAN

How To Use THIS PLAN

POLICY GUIDANCE

Descriptions for each of the identified “Place Types” includes recommendations on land use; the character, or form, of development; transportation and mobility; open space; and appropriate zoning designations. This policy is intended to guide decisions on proposed development decisions, including zoning and subdivision. Additionally, this policy should guide changes and improvements to development regulations intended to implement the community’s vision for the future of the County’s corridors. Recommendations for “Place Types” are organized as follows:

- » Locations
 - General area of applicability based on location and “Place Type”
- » Proposed Land Use
 - Appropriate land uses within each “Place Type”
- » Proposed Development Character
 - Building size
 - Building placement on the lot
 - Building height
 - Location of access and parking
 - Landscaping/buffering
- » Mobility Policy
 - Appropriate transportation cross section and elements based on the Marshall County Transportation Plan
- » Open Space Policy
 - Guidance for public/private open space where applicable
- » Appropriate Zoning Designations



INTERFACE WITH THE MARSHALL COUNTY GROWTH PLAN

The Marshall County Growth Plan was adopted in 2007 and should be revisited in the near future. Nevertheless, community input into this Plan is generally consistent with the goals of the Growth Plan particularly as it relates to preserving the County's rural character while embracing smart growth. While this plan is not concerned with legislative requirements related to urban growth boundaries, it is concerned with future development along key corridors in the County. This Plan should be considered an evolution of development policy from the Growth Plan.

The Growth Plan established land use policy that development should occur along Marshall County's key corridors while preserving the remainder of the County's rural character. This Plan takes it another step forward in pinpointing where exactly along these key corridors future development should occur and what it should look like. This approach promotes healthier growth patterns in the long term.

INTERFACE WITH THE MARSHALL COUNTY COMPREHENSIVE TRANSPORTATION PLAN

As mentioned in previous sections, this Corridors Plan can be considered a companion to the recently adopted Comprehensive Transportation Plan (CTP). The CTP establishes guidance on the design of roadway improvements, in the form of street cross sections and other recommendations, along key corridors based on existing context and future development. To ensure an interface between the two plans, each "Place Type" in the Corridor Plan includes mobility policy derived directly from the CTP. Appropriate street cross sections and other recommendations have been referenced in this plan so that both documents are linked and guide municipal decisions.

ACTIONS (CP-)

CP-1: Adopt the Marshall County Corridors Plan as official land use planning policy for future development along Marshall County's key corridors.

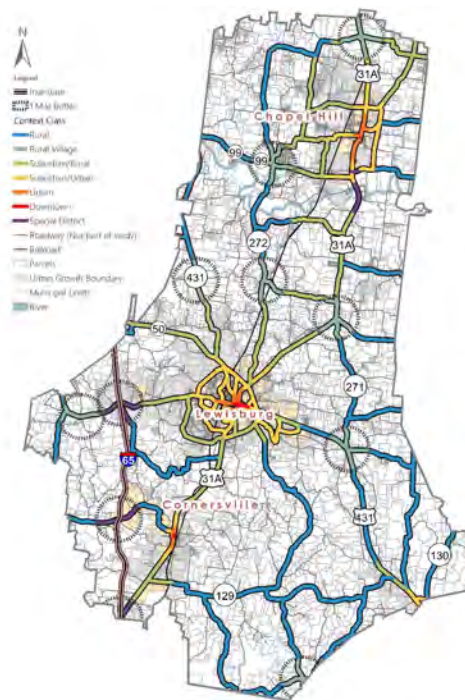
CP-2: Utilize the Marshall County Comprehensive Transportation Plan in conjunction with this plan when reviewing development and zoning requests to guide municipal decisions.

CP-3: Update the County's Growth Plan.

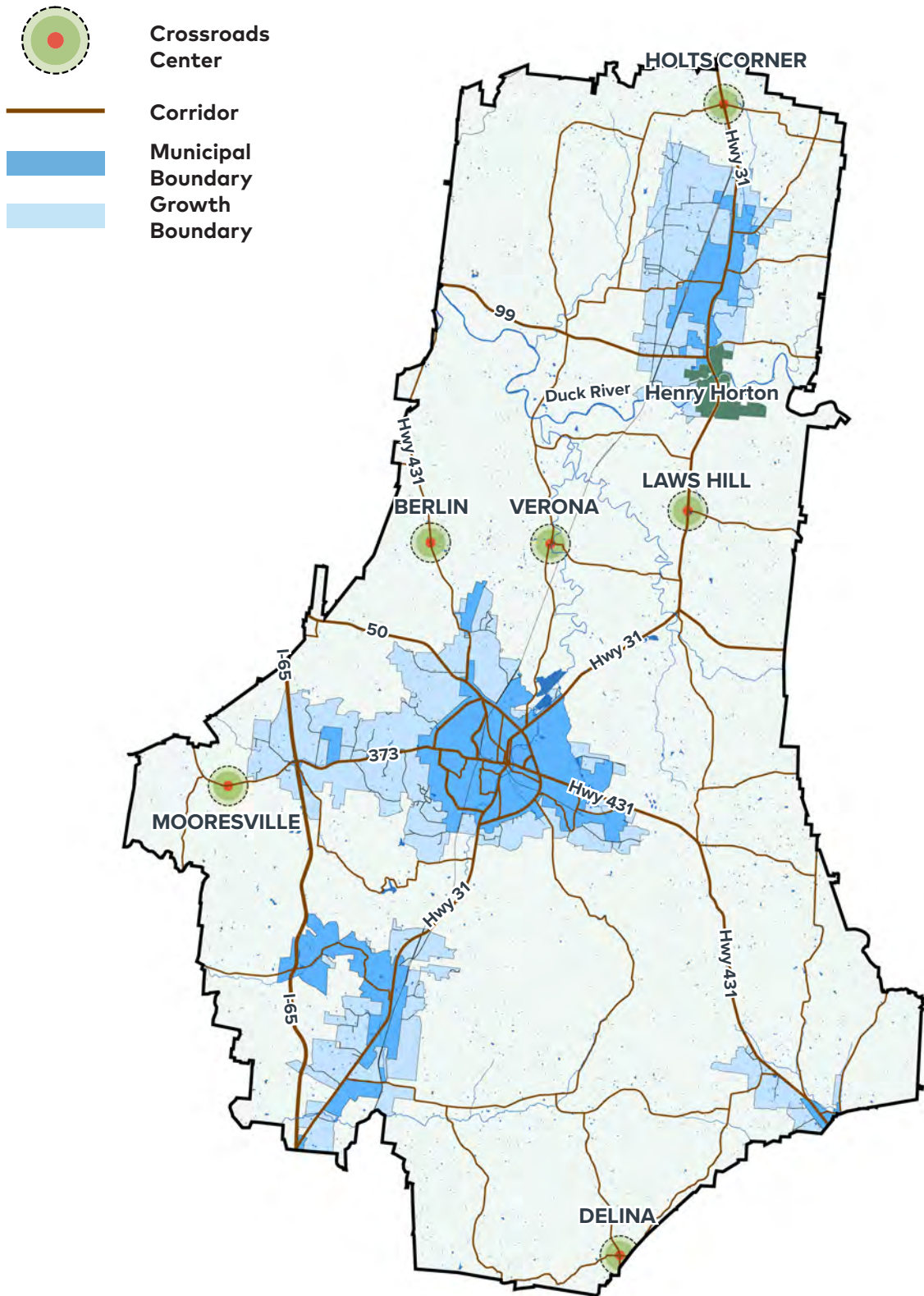
CP-4: Create an Implementation Committee that meets, at a minimum, twice a year to review progress toward implementation and make recommendations on prioritization.

CP-5: Issue an annual report on implementation progress.

CP-6: Coordinate and collaborate with municipalities to address growth and annex issues to the mutual benefit of everyone.



In the Comprehensive Transportation Plan roadways are classified by context based on existing physical characteristics, municipal limits and growth boundaries, and forecasted growth.



FRAMEWORK PLAN • CROSSROADS CENTERS

CROSSROADS CENTER

POLICY INTENT

- » Preserve the rural character of established crossroads centers within Marshall County;
- » Limit the expansion of commercial uses within these centers;
- » Preserve rural residential around the centers; and
- » Preserve historic “corner store” buildings when possible to reinforce the crossroads character.



Existing Condition Image

LOCATIONS

Generally within a 1/4 mile radius of the following identified centers:

- » Holts Corner (just north of intersection of Hwy 31A, Beasley Rd./Thick Rd.)
- » Verona (Verona Caney Rd. and Anes Station Rd.)
- » Berlin (Hwy 431 and Franklin Pk./Berlin Rd.)
- » Laws Hill (Hwy 31A and Mt. Lebanon Rd.)
- » Mooresville (Hwy 373 and Mooresville Rd./Fitzpatrick Rd.)
- » Delina (Delina Rd. and John Barnes Rd./Delina Booneshill Rd.)

PROPOSED LAND USE

- » Commercial uses limited to intersection of major roads (i.e. country store)
 - Variety of retail, restaurant, entertainment uses
 - Residential should be allowed above commercial
- » Rural residential around center (i.e. 30,000 sf+ lots min. working within current regulations)
- » Civic or institutional uses should be permitted (small churches, civic buildings, etc.)
- » Agricultural uses

PROPOSED DEVELOPMENT CHARACTER

- » Commercial buildings
 - Built close to road
 - Limited in footprint (i.e. small stores or venues)
 - Height limited to 2 stories
 - Parking to the side or rear (parking in front of building as part of streetscape is acceptable)
 - Flexibility in materials (masonry, siding, etc.)
 - Cross access between adjacent parking lots
 - Parking lots screened along major roads

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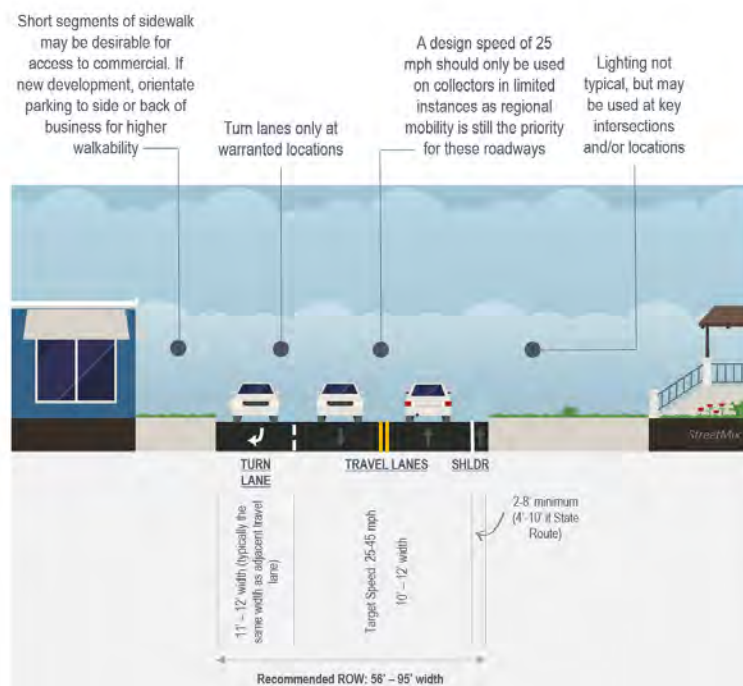
- Limit the number and design of fuel pumps for gas stations
- Site lighting should be pedestrian scale and minimize light pollution
- » Residential buildings
 - Generous front yards
 - Height limited to 2.5 stories
- » Civic and institutional buildings
 - Flexibility on setback, but ideally close to the road
 - Limited in footprint (i.e. no mega-churches)
 - Limited to 2 stories
 - Parking to the side or rear
 - Spires, bell towers, etc. may exceed the maximum height
- » Agricultural buildings
 - No special design standards

MOBILITY (FROM COMPREHENSIVE TRANSPORTATION PLAN)

- » Preferred cross section for corridors: Rural Village cross section
- » Additional cross sections: Rural, Suburban/Rural

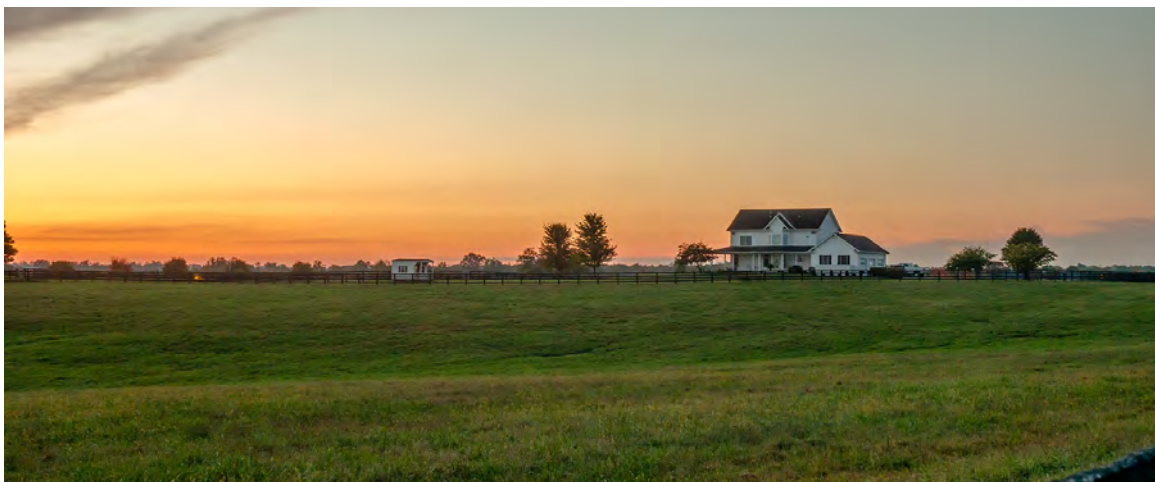
APPROPRIATE CURRENT ZONING DESIGNATIONS

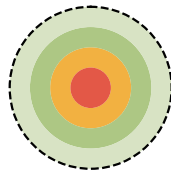
- » C-1
- » A-2
- » A-1



**RURAL VILLAGE STREET CROSS SECTION
FROM THE COMPREHENSIVE TRANSPORTATION PLAN**

CROSSROADS CENTER PRECEDENT IMAGERY





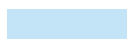
Rural Center



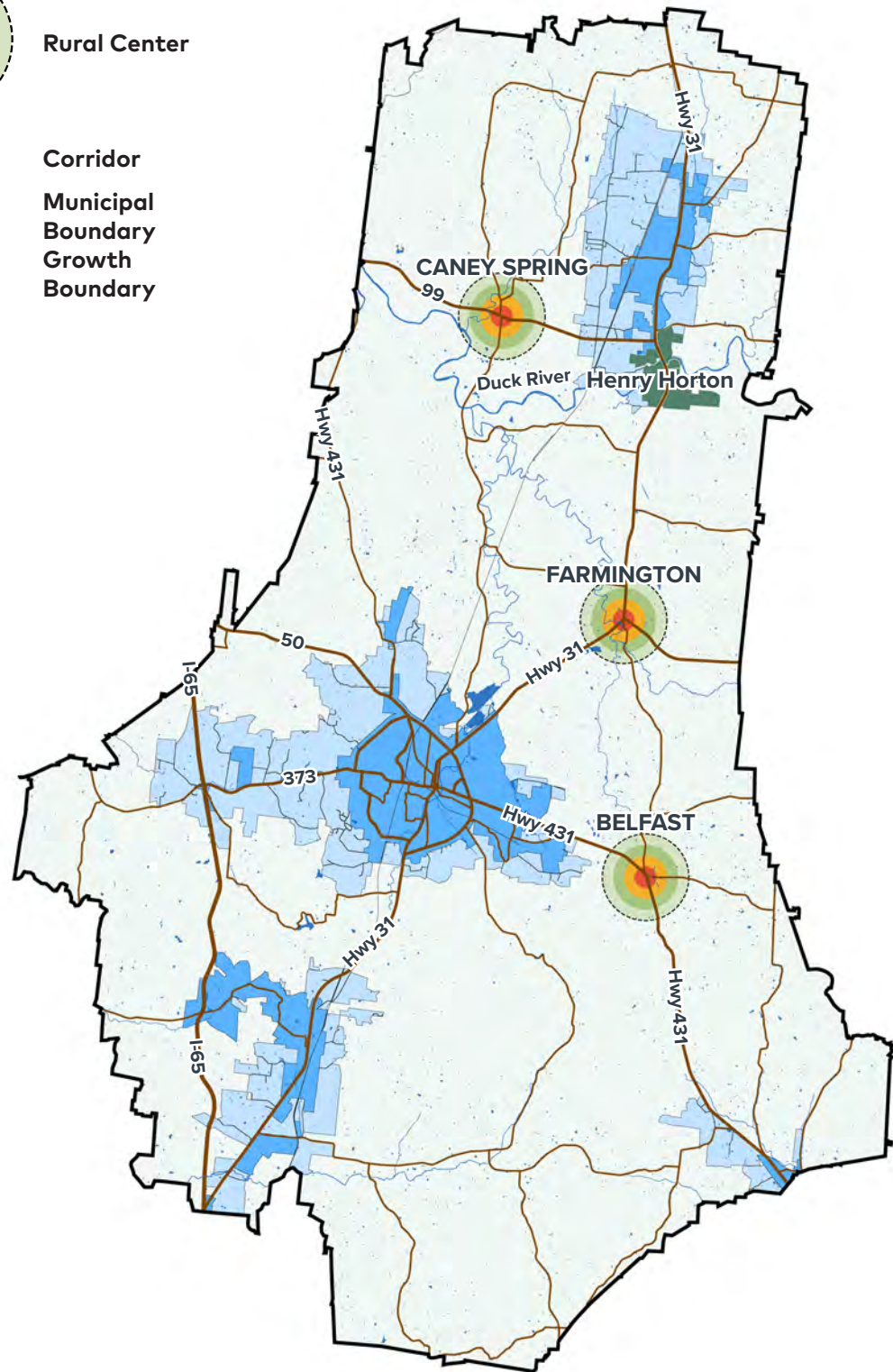
Corridor



Municipal
Boundary



Growth
Boundary



FRAMEWORK PLAN • RURAL CENTERS

RURAL CENTER

POLICY INTENT

- » Allow for moderate residential and commercial growth within established small centers in Marshall County;
- » Preserve and adaptively reuse historic buildings in key locations to create destinations along major roads; and
- » Allow for medium-scale commercial uses to serve the surrounding residential neighborhoods and rural community.



Existing Condition Image

LOCATIONS

Generally within a 1/2 mile radius of the following identified centers:

- » Belfast (Hwy 431 and Belfast Rd./Farmington Rd.)
- » Farmington (Hwy 31A and Shelbyville Hwy)
- » Caney Spring (TN-99 and Verona Caney Rd.)

PROPOSED LAND USE

- » Commercial uses limited to areas immediately around and near the intersections of major roads
 - Variety of retail, restaurant, entertainment uses
 - Residential should be allowed above commercial
- » Clustered residential and a mixture of housing types should be encouraged around commercial nodes
- » Suburban residential should be allowed around commercial nodes
- » Civic or institutional uses should be permitted (religious buildings, civic buildings, etc.)
- » Rural residential should be encouraged as a transition between clustered/suburban residential and agricultural uses
- » Agricultural uses should ideally be limited to the edges of Rural Centers

PROPOSED DEVELOPMENT CHARACTER

- » Commercial buildings
 - Built close to road
 - Limited in footprint (i.e. small stores or venues)
 - Height limited to 2 stories
 - Parking to the side or rear (parking in front of building as part of streetscape is acceptable)
 - Design standards for building facades facing a major road
 - Cross access between adjacent parking lots

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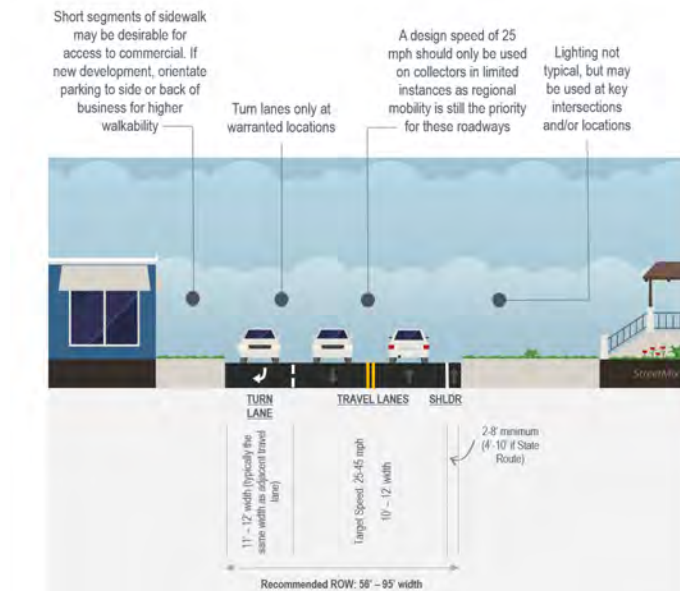
- Parking lots screened along major roads
- Site lighting should be pedestrian scale and minimize light pollution
- » Residential buildings
 - Shallow front yards for clustered/suburban residential on internal streets
 - Deep natural/vegetated buffer (200 ft.) between clustered/suburban residential on major roads
 - No backs of residential buildings facing roadways
 - Generous front yards for larger, rural lots
 - Height limited to 2.5 stories
- » Civic and institutional buildings
 - Flexibility on street setback, but ideally close to the road
 - Height limited to 2 stories
 - Parking to the side or rear
 - Spires, bell towers, etc. may exceed the maximum height
- » Agricultural buildings
 - No special design standards

MOBILITY (FROM COMPREHENSIVE TRANSPORTATION PLAN)

- » Preferred cross section for corridors: Rural Village cross section
- » Additional cross sections: Rural, Suburban/Rural

APPROPRIATE CURRENT ZONING DESIGNATIONS

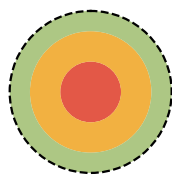
- » C-1
- » R-1
- » A-2
- » A-1



**RURAL VILLAGE STREET CROSS SECTION
FROM THE COMPREHENSIVE TRANSPORTATION PLAN**

RURAL CENTER PRECEDENT IMAGERY





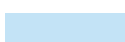
Community
Center



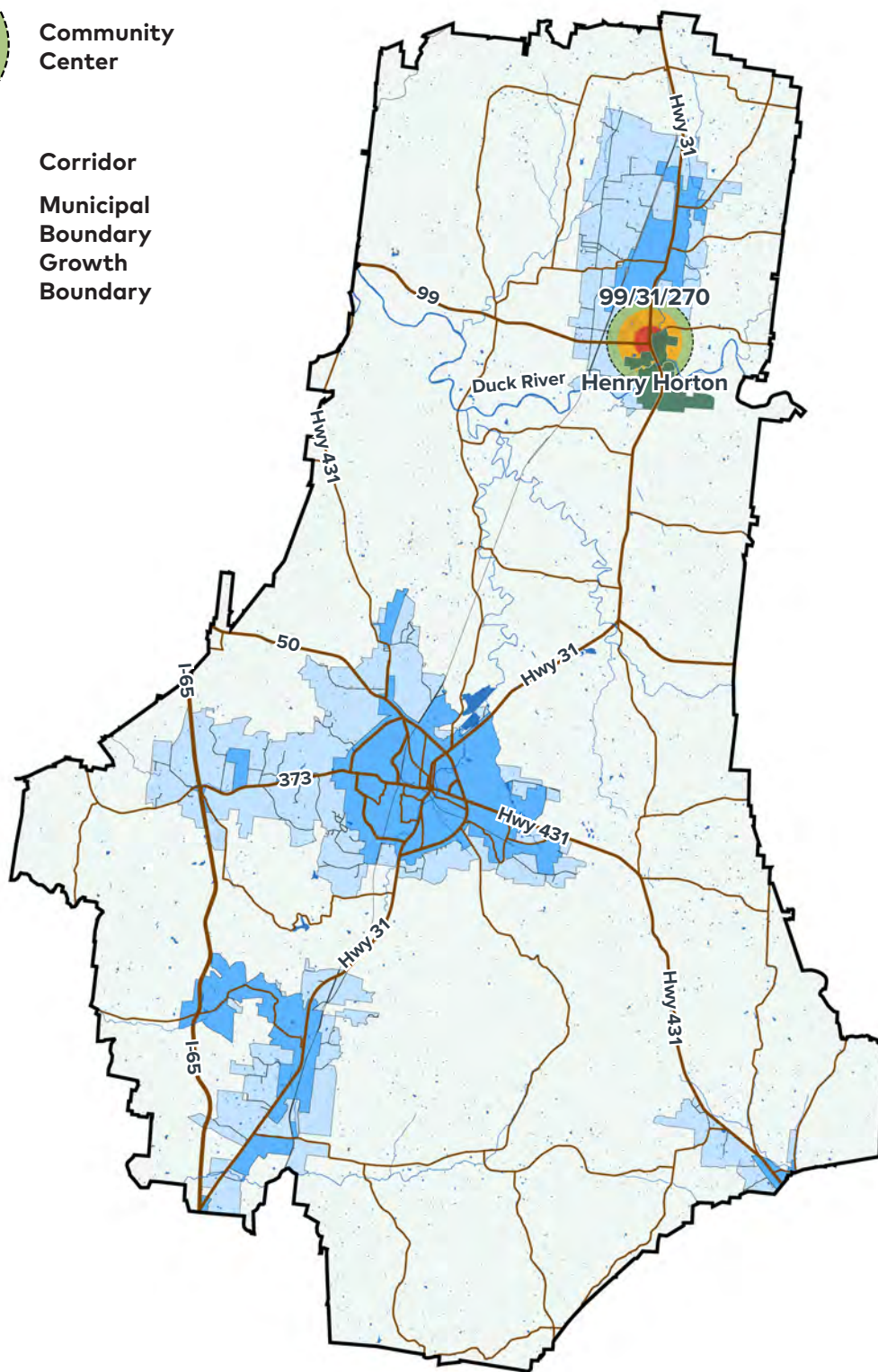
Corridor



Municipal
Boundary



Growth
Boundary



FRAMEWORK PLAN • COMMUNITY CENTERS

COMMUNITY CENTER

Policy Intent

- » Allow for growth within the established center near the intersection of 99, 31, and 270 and just north of Henry Horton State Park
- » Allow for a mixture of uses that serve County residents as well as tourists visiting Henry Horton State Park and the Duck River



Existing Condition Image

LOCATIONS

Generally within a 1/2 mile radius of the following identified center:

- » North of Wilhoite Mills (Hwy 31A and TN-99/TN-270)

PROPOSED LAND USE

- » Commercial uses limited to areas immediately around and near the intersections of major roads to minimize commercial strips
 - Encourage anchor uses that serve population centers and leverage other commercial uses
 - Encourage a mixture of uses with a focus on masterplanned pedestrian-friendly development
 - Encourage office uses to promote workplaces in the County
 - Residential should be allowed above commercial
- » Clustered residential and a mixture of housing types should be encouraged around and within commercial nodes
- » Civic or institutional uses should be permitted (religious buildings, civic buildings, etc.)
- » Rural residential should be encouraged at the edge of Community Centers
- » Agricultural uses should be discouraged in these areas

PROPOSED DEVELOPMENT CHARACTER

- » Commercial buildings
 - Built close to road OR built close to a frontage road if fronting a major corridor
 - Limited to 3 stories
 - Parking primarily to the side or rear with limited parking between building and a major corridor
 - Design standards for building facades facing a major road
 - Cross access between adjacent parking lots
 - Parking lots screened along major roads

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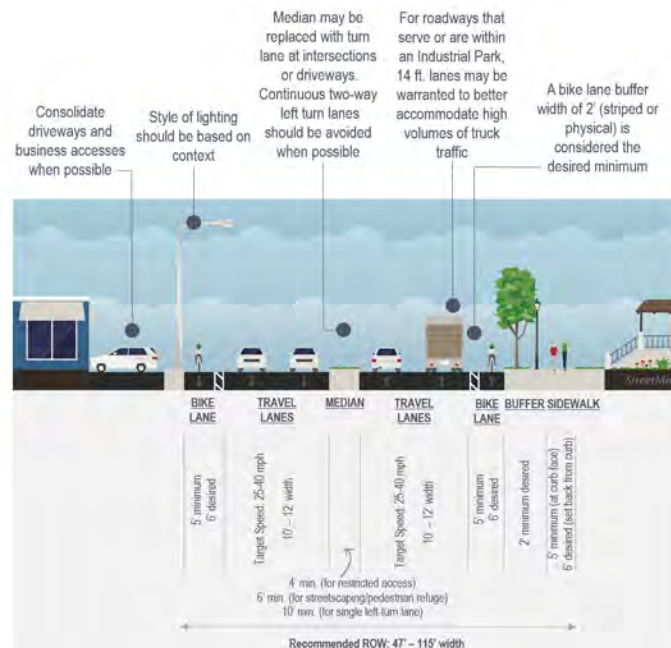
- Site lighting should minimize light pollution
- » Residential buildings
 - Shallow front yards for clustered residential on internal streets
 - Deep natural/vegetated buffer (100 ft.) between clustered/suburban residential on major roads
 - No backs of residential buildings facing roadways
 - Generous front yards for larger, rural lots
 - Height limited to 3 stories
- » Civic and institutional buildings
 - Flexibility on street setback, but ideally close to the road
 - Height limited to 3 stories
 - Parking to the side or rear
 - Spires, bell towers, etc. may exceed the maximum height
- » Master planned development should include active and passive open space for residents

MOBILITY (FROM COMPREHENSIVE TRANSPORTATION PLAN)

- » Preferred cross sections for corridors: Suburban/Urban cross section
- » Additional cross sections: Urban, Suburban/Rural

APPROPRIATE ZONING DESIGNATIONS

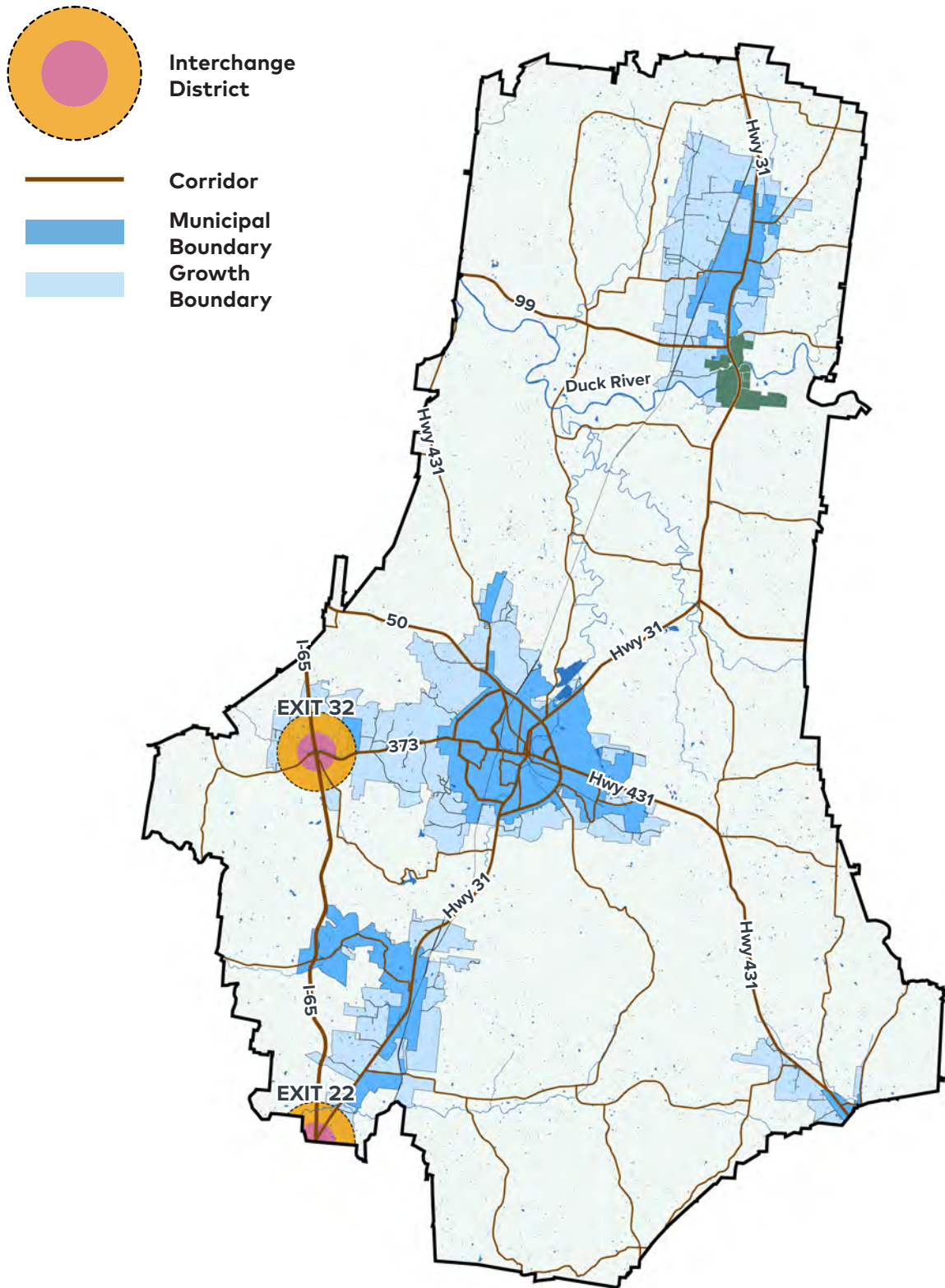
- » C-1
- » C-2
- » R-1
- » A-2



**SUBURBAN/URBAN STREET CROSS SECTION
FROM THE COMPREHENSIVE TRANSPORTATION PLAN**

COMMUNITY CENTER PRECEDENT IMAGERY





FRAMEWORK PLAN • INTERCHANGE DISTRICTS

INTERCHANGE DISTRICT

Policy Intent

- » Encourage orderly, attractive, interchange commercial redevelopment at key interchanges; and
- » Create gateways to important cities within the County.



Existing Condition Image

LOCATIONS

Generally within a 1/2 mile radius of the following identified centers:

- » Exit 32
- » Exit 22

PROPOSED LAND USE

- » Commercial uses that serve interstate travelers as well as the surrounding community

PROPOSED DEVELOPMENT CHARACTER

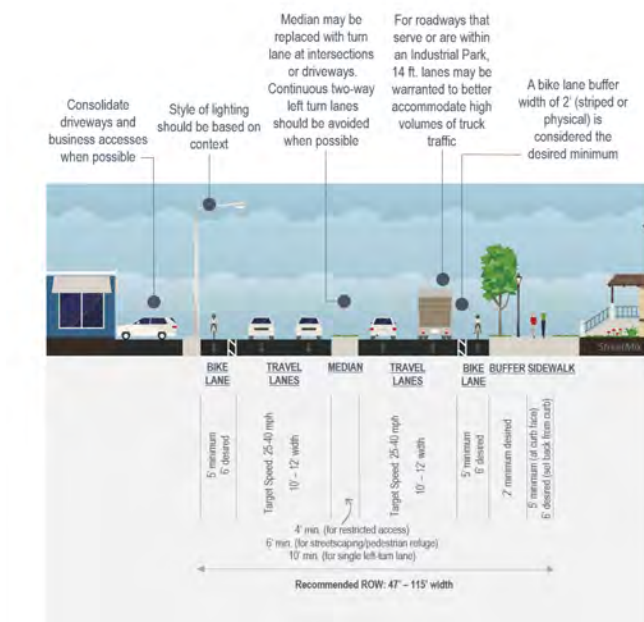
- » Commercial buildings
 - Built close to road OR built close to a frontage road if fronting a major corridor
 - Height limited to 5 stories
 - Parking primarily to the side or rear with limited parking between building and a major corridor
 - Design standards for building facades facing a major road
 - Cross access between adjacent parking lots
 - Parking lots screened along major roads

MOBILITY

- » Preferred cross sections: Special District, Suburban/Urban
- » Additional cross sections: Suburban/Rural

APPROPRIATE ZONING DESIGNATIONS

- » C-2
- » C-1



**SUBURBAN/URBAN CROSS SECTION
FROM THE COMPREHENSIVE TRANSPORTATION PLAN**

INTERCHANGE DISTRICT PRECEDENT IMAGERY



THE DOWNTOWNS

The historic downtowns of Marshall County are some of its greatest assets. Historically, they were the most important centers of activity in the county and to some extent remain so today. The historic character, heritage, and vitality of these areas is important to the future of Marshall County. Vital downtowns create a sense of place that is unique to each community. A vital downtown is a key quality-of-life issue for many businesses considering to relocate to a community. A vital downtown is one that not only serves its citizens, but also visitors. This makes downtowns a powerful economic engine for a community.

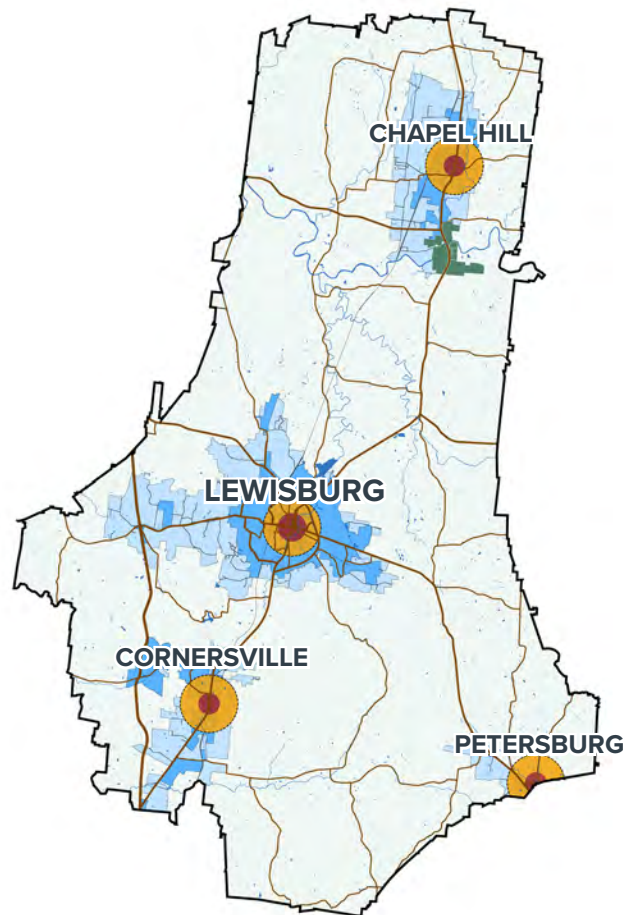
Lewisburg has begun to take steps toward improving their downtown. Over the years they have improved streetscape, public spaces, provided grants for building rehabilitation, and just recently adopted their first Historic District overlay for Downtown. Chapel Hill, Cornersville, and Petersburg should follow Lewisburg's lead and focus on improving their downtowns. While each municipality governs what occurs within its boundaries, the County can play a supporting role in the revitalization and sustainability of each City's Downtown through cross-promotion, coordination, and support of specific projects. The physical aspects of downtown revitalization is dependent on preserving historic character, mandating compatible infill development, improving streetscapes for walkability, and creating or maintaining public open spaces for civic gatherings. Working together, the combined forces of the County and municipalities can generate better results.




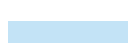
D-1: Encourage Chapel Hill, Cornersville, and Petersburg to follow Lewisburg's lead in establishing a local Historic District to preserve their historic downtowns.

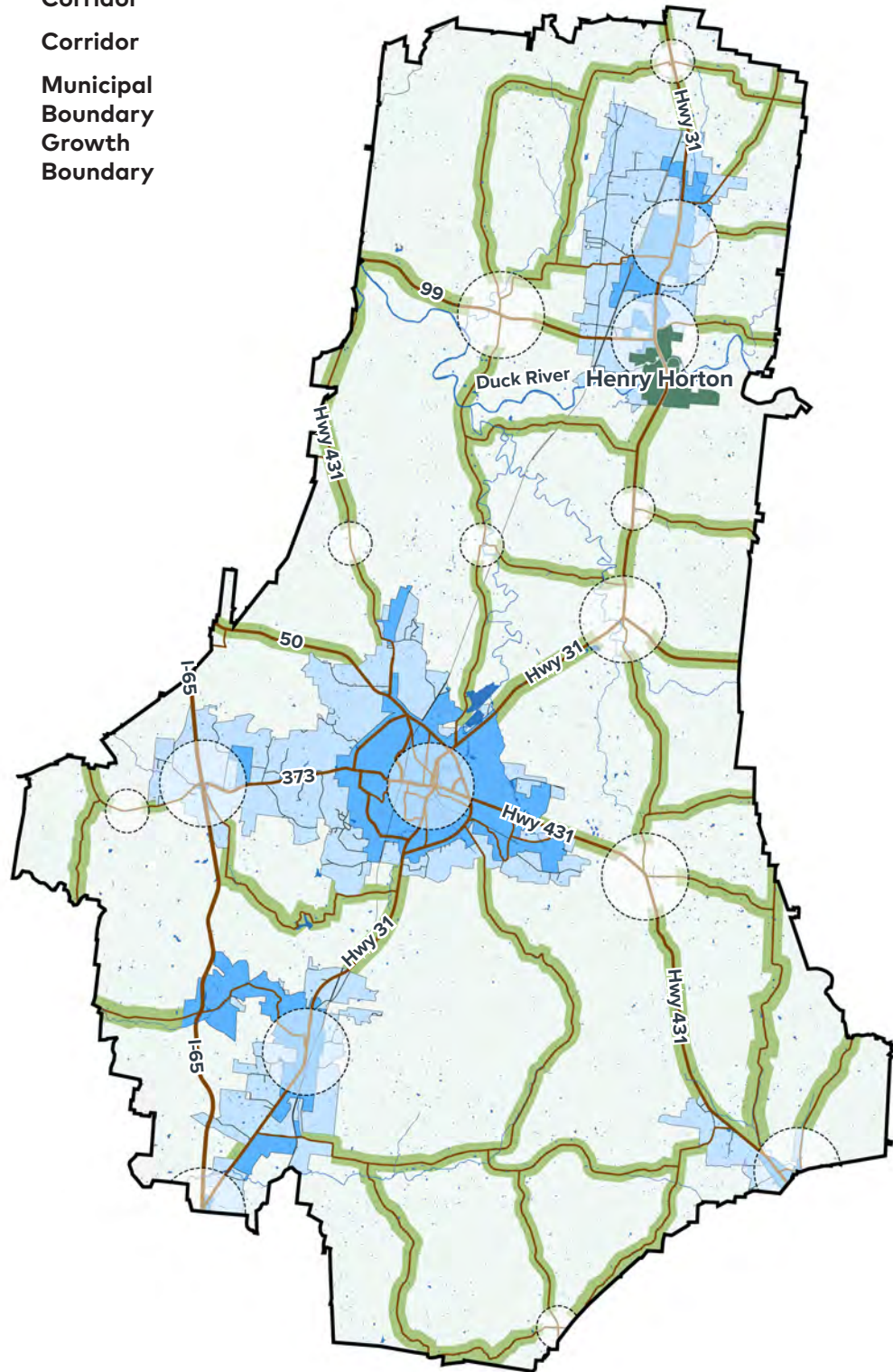
D-2: Collaborate with each municipality to coordinate streetscape improvements, including wayfinding, to create a cohesive environment that complements and ties the County together.

D-3: Coordinate with the municipalities to improve multi-modal connectivity between the downtowns and key public assets.

D-4: Collaborate with the municipalities to conduct joint training workshops for City/County staff, Planning Commissions, and Boards of Zoning Appeals to share information on development regulation updates.



-  Rural Corridor
-  Corridor
-  Municipal Boundary
-  Growth Boundary



FRAMEWORK PLAN • RURAL CORRIDORS

RURAL CORRIDOR

Policy Intent

- » Preserve the rural character along corridors between established centers; and
- » Allow for agriculture and rural residential development within the County along major corridors



Existing Condition Image

PROPOSED LAND USE

- » Civic or institutional uses should be permitted (religious buildings, civic buildings, etc.)
- » Rural residential should be encouraged at the edge of Community Centers
- » Agricultural uses

PROPOSED DEVELOPMENT CHARACTER

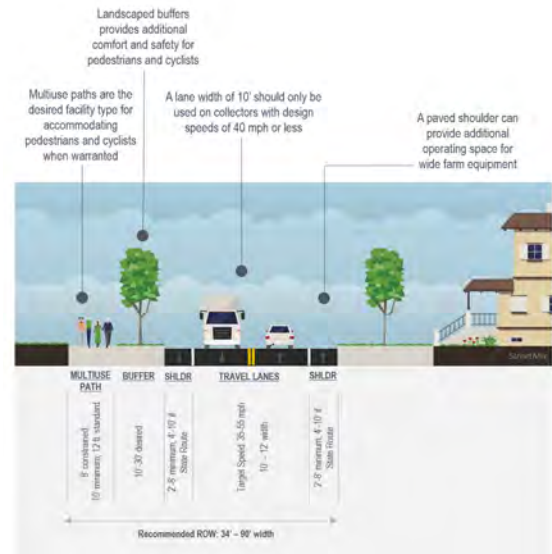
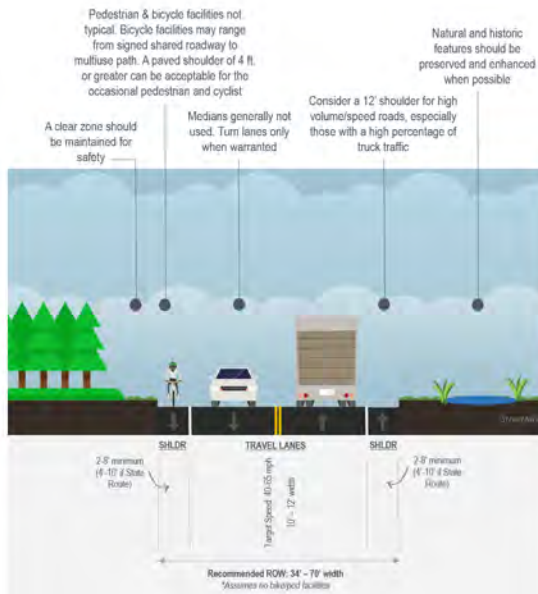
- » Residential buildings
 - Generous front yards
 - Height limited to 2.5 stories
- » Civic and institutional buildings
 - Flexibility on setback, but ideally close to the road
 - Limited in footprint (i.e. no mega-churches)
 - Limited to 2 stories
 - Parking to the side or rear
 - Spires, bell towers, etc. may exceed the maximum height
- » Agricultural buildings
 - Establish separation distance standards for large-scale poultry farm houses

MOBILITY

- » Rural or Suburban/Rural cross section
- » Additional cross sections: Rural Village

APPROPRIATE ZONING DESIGNATIONS

- » A-2
- » A-1



RURAL AND SUBURBAN/RURAL CROSS SECTIONS FROM THE COMPREHENSIVE TRANSPORTATION PLAN

RURAL CORRIDOR PRECEDENT IMAGERY



THE DUCK RIVER "CORRIDOR"

The Duck River is an important alternative recreational corridor within Marshall County that connects the County with the surrounding region. The Duck River Blueway Guide highlights opportunities for recreational activities associated with the Duck River in Marshall and Maury Counties. The County features two launch points at Lillard's Mill and Henry Horton State Park. River enthusiasts can float between Henry Horton and just outside Columbia in Maury County. There are currently canoe rental companies along TN-99 on the western edge of the County. Opportunities exist in both the Caney Spring and the 99/270/31A Community Center near Henry Horton to leverage this key asset.

CREATE A RECREATION-ORIENTED VISITOR NODE AT CANEY SPRING

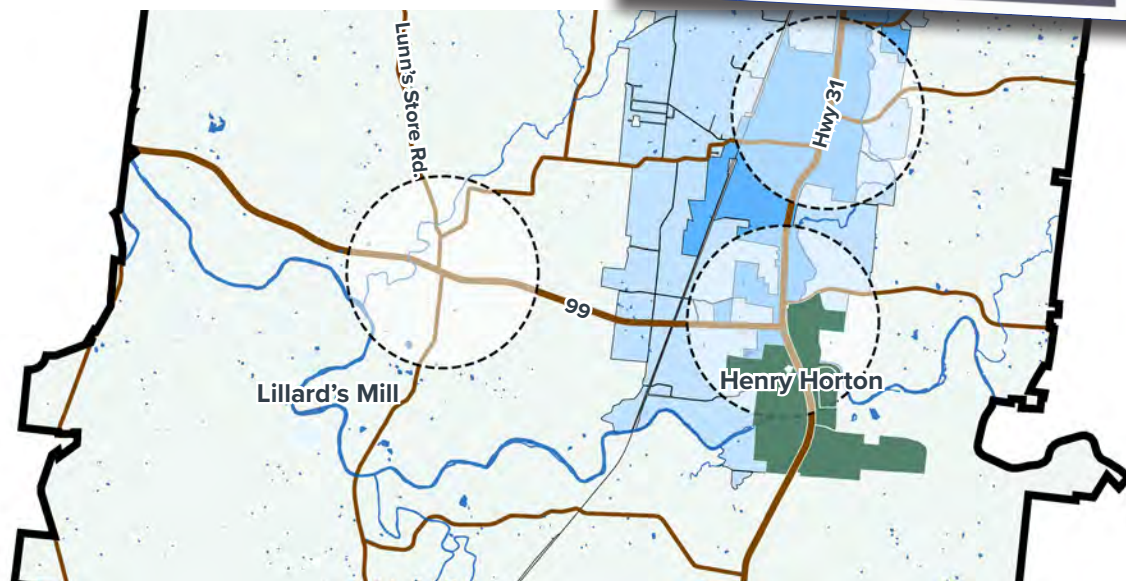
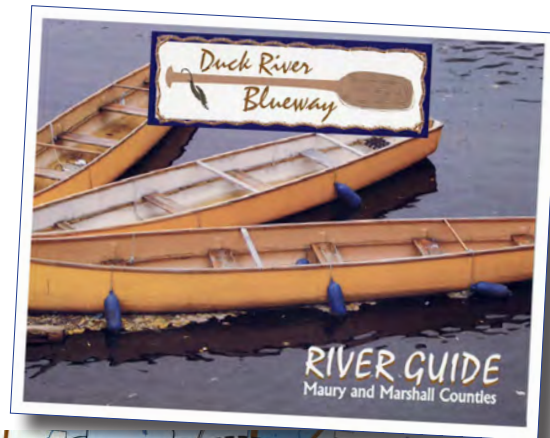
As noted earlier, the Caney Spring area is appropriate for recreation and convenience-oriented retail associated with Duck River recreational visitors and to serve the growing residential communities west of Chapel Hill. A recommended approach would be to pursue a blue way trailhead type of facility on the north

side of the Duck River to serve as a hub for well-planned, small-scale retail. The trailhead might be augmented by a convenience business alongside recreation apparel and equipment sales. It will also be important, as noted elsewhere, that the County pursue collaboration with neighboring counties in the Duck River watershed to protect the river and promote a regional recreational blue way corridor along the length of the Duck River.

ACTIONS (DRC-)

DRC-1: Establish a Blue Way trailhead-type facility on the north side of the Duck River near the Caney Spring area.

DRC-2: Promote the Caney Spring area as a hub for master planned commercial associated with the Duck River Blueway.



DEVELOPMENT REGULATIONS

As stated in the Background Analysis in the Introduction, the current development regulations (primarily the Zoning Resolution) can be improved and updated. Once adopted, this plan will require changes and additions to the current development regulations to implement its recommendations. The following recommendations are imperative to enforce the development policy of the in the Marshall County Corridors Plan.

LAND USE

The Land Use Table in the County Zoning Resolution should be simplified. In some instances the with regard to “Special Exception” uses, more direction is necessary. At a minimum the County should consider the following:

- » Consolidate similar retail uses into a single category (e.g. shirt stores, shoe stores, uniform stores, women’s ready-to-wear stores, and women’s dress shops can all be considered general retail uses). If necessary based on context, some uses can be further classified by size or conditions added to certain uses based on context.
- » Reconsider permitting single-family and duplex in the C-2 zoning district, which is the most intense commercial district. Residential should be permitted; however, it should be higher intensity housing and mixed-use.
- » Some uses listed as “Special Exception” seem to lack the conditions necessary for the Board of Zoning Appeals (BZA) to make an informed decision.
- » Consider designating some uses as “Permitted with Conditions” that do not require BZA approval as long as specific conditions are described in the resolution.
- » Reconsider and/or eliminate the C-3 district as there are very few uses permitted.
- » Consider allowing vertically mixed-use buildings in appropriate locations. This should include revising the definition of multi-family to include dwellings within a mixed-use building.

DISTRICTS AND BULK REGULATIONS

The Zoning Districts and Bulk Regulations (development standards) should be updated to reflect the diversity of character areas envisioned by this plan. Zoning Districts classify different types or areas of development that may vary in use and form. Bulk regulations are the dimensional standards development must meet within a particular Zoning District. The following changes are recommended:

- » Simplify or clarify the Cluster Residential Development standards to permit a broader range of building types.
- » Create a new Zoning District that permits the development of compact, walkable neighborhoods. This district should require a site-specific master plan as well as include standards that address the mixture of uses; a mixture of housing types; ensure a connected, pedestrian-friendly street network; and usable open space for residents.
- » Revise or redefine the bulk regulations of the commercial Zoning Districts to better align with this plan. This includes reviewing the current 100 ft. setback and revising it based on context, desired future character as outlined in this plan, and the potential future right-of-way defined in the Comprehensive Transportation Plan.

BUILDING DESIGN STANDARDS

The current standards related to commercial building design in the Zoning Resolution are weak and lack enough specifics for staff to adequately address whether applicants have met the minimum standard. The County does not have to be “heavy-handed” when it comes to standards, but there is a public desire to be more definitive. The plan recommends the following:

- » Develop standards related to the orientation of buildings to streets including the location of entrances. These standards should address interior lots as well as corner lots.
- » Develop clear standards for appropriate building facade materials and how they should be applied.

- » Develop standards for the general articulation of buildings to avoid massive, uninterrupted facades.
- » Develop standards for openings including windows at street level and upper levels as well as doors.
- » Develop standards for other architectural features that are attached to facades such as porches, stoops, balconies, and decks.

LANDSCAPE STANDARDS

Similar to the Building Design Standards, the current Zoning Resolution lacks specificity with regard to landscaping standards. Landscaping helps to minimize the visual impact of development and, in some cases, helps to mitigate the impact of adjacent, incompatible development. This plan recommends the following:

- » Define appropriate buffers between incompatible uses in a suburban context with specific standards related to dimension and species.
- » Avoid requiring buffers between uses in mixed-use, walkable developments since the development should be designed with compatibility in mind.
- » Add a separation distance between corridors and residential development in the Rural Corridor Place Type and some of the more rural contexts of other Place Types. The separation distance should be a minimum of 200 ft. or 100 ft. with natural, mature vegetation. Dwelling units should not back up to corridors.
- » Clarify landscape standards for screening, including specific parameters for the screening of refuse, utilities, and parking from roadways.

SITE STANDARDS

The site surrounding development is as important as the building itself. The County's requirements for landscaping and other site-related elements should be less vague and more specific. The following are recommended changes:

- » Review the County parking requirements and adjust according to context (e.g. mixed-use walkable areas will have more shared parking than auto-dependent areas).

- » Limit curb cuts to minimized disruptions in the pedestrian network.
- » Require cross-access between adjacent parking areas to reduce dependence on key corridors for access.
- » Adopt standards to address light pollution and trespass on adjacent properties.
- » Revisit the signage standards particularly as it relates to any new Zoning Districts that permit a mixture of uses in a pedestrian-friendly development.

PROPERTY MAINTENANCE

The maintenance of existing properties was identified early on as a concern for the County. The State of Tennessee has adopted the 2018 set of International Codes, which includes the International Property Maintenance Code. This model code can be customized to the community and adopted with minor expense. It is important to note that the adoption of such a code requires dedicated staff for its enforcement.

- » Customize and adopt the 2018 Property Maintenance Code for the County and budget a staff position to enforce it.

ADMINISTRATIVE PROCEDURES

If the County moves forward with updating its antiquated development regulations, it will be necessary to update the Administrative Procedures to ensure that the County Zoning/Building Codes Officer has the proper information from applicants to review and, if necessary, provide a recommendation to the Planning Commission and/or the Board of Zoning Appeals.

ACTIONS (DR-)

LAND USE

DR-1: Simplify Land Use Table to avoid redundancy and confusion in allowable land uses.

DR-2: Allow mixture of uses within a single building and/or district for appropriate "Place Types" in the County.

DISTRICTS AND BULK REGULATIONS

DR-3: Simplify and/or clarify the Cluster Res-

idential Development standards to permit a mixture of lot and housing types in appropriate locations according to this plan.

DR-4: Add a new zoning district or planned development overlay district to allow for compact, walkable neighborhoods with a mixture of uses, housing types, and applicable design standards to be applied to Rural Centers, Community Centers, and other Place Types as appropriate.

DR-5: Revise the bulk requirements of the Commercial zoning districts as they relate to building placement and height, to conform to this plan.

BUILDING DESIGN STANDARDS

DR-6: Consolidate, revise, and add standards to address the design of commercial buildings. These standards should be clearly organized to address building materials; the articulation and massing of building facades; the amount, location, rhythm, and design of openings including windows and entrances; and the design of roofs and parapets.

LANDSCAPE STANDARDS

DR-7: Provide clear design direction on landscape buffers where appropriate based on adjacent land uses.

DR-8: Add standards to ensure an appropriate separation distance between corridors and residential development, including standards related to the orientation of buildings to corridors.

DR-9: Provide specific standards for landscaping and screening as it relates to parking along corridors, internal parking lots, outdoor equipment, and refuse storage.

SITE STANDARDS

DR-10: Add standards for parking lot design and access, particularly as it relates to shared access, minimizing curb cuts and driveway widths, and cross access between adjacent developments.

DR-11: Improve standards for lighting as it re-

lates to the height of fixtures and the reduction of light pollution. Refer to the International Dark Sky Association model standards.

SIGNAGE

DR-12: Revisit signage standards and adjust for different contexts as established by the intent for each “Place Type.”

PROPERTY MAINTENANCE

DR-13: Modify and adopt the International Property Maintenance Code for commercial properties along the corridors.

ADMINISTRATIVE PROCEDURES

DR-14: Update Site Plan requirements in the Zoning Resolution to ensure that applicants provide the proper information to review development proposals against new standards in the Zoning Resolution.

STRATEGIC MARKET RECOMMENDATIONS

This section provides strategic recommendations for land use, marketing, and development in Marshall County's corridors and within the "nexus" of these corridors in Downtown Lewisburg. The recommendations are disaggregated by submarkets, as defined previously in this report, with strategies also provided for selected corridors. Additional strategic recommendations are made for several "rural service nodes." Key opportunities have been identified from the market findings in the Introduction as a basis for these strategic recommendations.

LEWISBURG SUBMARKET

While there is an oversupply of retail space in the Lewisburg submarket, there is still demand for space that can be met there. A key focus would need to be on filling some of the existing vacant space before encouraging significant new commercial development. It is also important to strengthen the dining and entertainment destination appeal of Downtown Lewisburg, which can drive the market to fill vacant retail space in the area. There are also opportunities at Exit 32, which forms an extension of the City of Lewisburg and of the Lewisburg submarket. While much of the Lewisburg submarket is situated within the City of Lewisburg, all efforts

to enhance retail opportunities in the area will benefit the County in terms of attracting sales inflow, sales tax revenue and other fiscal benefits.

STRENGTHEN DOWNTOWN DESTINATION APPEAL

There are opportunities for retail and restaurant uses in the downtown area, but there is a need to recruit targeted independent businesses including up to 12,000 square feet of restaurant use, to the downtown area. There is significant leakage from Marshall County, in terms of dining and entertainment, to other areas in the I-65 Corridor. Downtown Lewisburg presents a good opportunity for concentrating full-service restaurants that would appeal to both the local market as well as tourists and other destination visitors.

The opportunities were also identified for specialty food, such as a bakery, along with home furnishings, shoes, accessories, personal services, and coffee shops in the downtown area. However, experience suggests that it would be challenging for many of these independent businesses to survive on their own without the broader anchor uses, such as restaurants and entertainment venues, to attract consumers back downtown. Thus, a priority would be to focus on those anchor uses that create destination appeal.



Good, local restaurant and entertainment uses can become anchors that draw people to a downtown and energize other uses. The locally-owned Puckett's family of restaurants (left) have helped to spur revitalization in nearby Columbia, while the Franklin Theater (above) draws a variety of patrons with its diverse programming.

RECRUIT HOME CENTER

There is growing demand in the county for a home center category retailer, such as a Lowe's or Home Depot store. While demand is insufficient to support such large stores at present, now is the time to start planning for the appropriate building or site that integrates the home center as an anchor for a broader retail mix. An existing vacant building might be targeted for reuse or redevelopment, or new construction encouraged when there is sufficient support in the market. Such stores help generate spin-off to other retailers because they draw from a broad trade area. Clearly there will be opportunities on The Bypass (especially for redevelopment of existing vacant space), but appropriate sites might also be located at I-65 Exit 32, which is closest to Lewisburg and to the county's I-65 Commerce Park.

Sites along I-65 can help the county draw more traffic and sales from outside of the county, thus generating more net fiscal benefits to the County. The Chapel Hill area, along Nashville Highway, may also be appropriate for home center stores because of residential development and retail demand growth in that submarket. However, that location is less likely to generate inflow to the county from other areas.

STRENGTHEN EXIT 32 AS A COMMERCIAL NODE

In addition to the opportunity of eventual development of a home center-anchored node at Exit 32, there is also the existing opportunity for restaurants. While demand for hotels was not tested through this market analysis, there may be opportunities for hotels at Exit 32 as well. Capturing hotel opportunities would help enhance the county's amenity base, generate support for restaurants, and strengthen the positioning of SR373 as the County's Economic Development Corridor, anchored by I-65 Commerce Park.

ACTIONS (SMR L-)

SMR L-1: Focus Downtown business recruitment efforts on anchor-type uses such as

full-service dining and entertainment establishments serving tourists and the local market.

SMR L-2: Identify potential sites along the Bypass and/or Exit 32 that can accommodate a home center as part of a mixed-use development.

SMR L-3: Conduct a market analysis for lodging and related uses near Exit 32 and the I-65 Commerce Park.

CHAPEL HILL SUBMARKET

Chapel Hill is clearly the growth center of Marshall County, being situated within the commuter shed of Spring Hill, Cool Springs, and Nashville. As the area continues to see residential development, there will be increased demand for convenience retail that serves this growing household base. Strategies relate to ensuring appropriate sites for retail business development that capture demand and serve the local community but also minimize traffic congestion and negative impacts on the county as a whole.

DIRECT RETAIL DEVELOPMENT TO AVOID CONGESTION

There will be growing demand for neighborhood convenience retail, including pharmacies, personal services, hardware, auto supply, gas/convenience, and restaurants. There will also be some increased demand for family-oriented entertainment. Nashville Pike is clearly a prime location for these retail and service businesses targeted to serving the needs of a growing population in Chapel Hill. However, every effort should be made to reduce the traffic impacts and avoid problems with congestion that are likely to occur if retail businesses are concentrated in certain locations on Nashville Pike.

Consider Alternative Locations. Retailers have located south of Chapel Hill in Wilhoite Mills no doubt to capture market support from the south and because of east-west access (on 270/99) to I-65 and Shelbyville. But as residential growth continues to the north and west of Chapel Hill, traffic will increasingly "funnel" into Nashville Pike and south through the congested down-

town area to access retail businesses located on the south side. Alternative locations for new retail, such as on the north or west sides of Chapel Hill, might be encouraged as a way to serve those newly developing areas.

Consider Alternative Traffic Patterns. Another approach might be to encourage development of alternative north-south routes that establish a “grid” transportation network. Such a network would help to distribute traffic more evenly and avoid bottlenecks. Even improvements to parallel roads within the downtown Chapel Hill area could help divert some traffic.

Reduce Curb Cuts. Regardless of location, it will be important to focus development in an integrated approach rather than permitting multiple businesses to develop in a way that they have their own individual ingress and egress points along main highways.

ENCOURAGE DEVELOPMENT OF RECREATION-ORIENTED TOURISM

Henry Horton State Park is located just south of Chapel Hill and generates a significant share of the county’s tourism base. The park is situated along the Duck River, which is fast becoming a recreation corridor as parks departments like Maury County enhance “blue way” recreation opportunities along the river and cities like Shelbyville look to improve their waterfronts as destination drivers. The market analysis identified business opportunities that are related to this recreation development, so long as there

is a concerted effort to promote the county and the river for recreation-based tourism. Such retail opportunities include a restaurant with an outdoor setting, for example, as well as retailer of sporting goods apparel and equipment. Henry Horton and The Verona Caney Road area may both be appropriate for small-scale and environmentally sensitive commercial development such as around a trailhead associated with the Duck River.

ACTIONS (SMR CH-)

SMR CH-1: Work with the Town of Chapel Hill to identify locations for a future Community Center to the north or west of Town to relieve development pressure near the intersection of 99/31A/270.

SMR CH-2: Implement the Comprehensive Transportation Plan and the Chapel Hill Bicycle and Pedestrian Study as it relates to future roadway, bicycle, and pedestrian connectivity to provide alternate routes to 31A.

SMR CH-3: In recruitment efforts and design review processes, encourage new development to be master planned and well-connected in a manner that reduces congestion on key corridors, such as 31A.

SMR CH-4: Identify and recruit recreation-related businesses at strategic locations along the 99 corridor to leverage the Duck River as a key recreational asset along with Henry Horton State Park.



In Asheville, North Carolina, the French Broad River is an important recreational asset. It is a destination for recreational businesses, such as canoe, kayak, and tube rentals, rock climbing gyms, and parks with greenways, a velodrome, and skate park.

CORNERVILLE SUBMARKET

Cornersville presents some opportunities for strengthening its historic core and also for visitor-related commercial development at Exit 22 (Lynnville Road). In particular, there is the opportunity identified for restaurant uses at the exit. Again, it is in the County's interest to encourage commercial development at certain points along I-65 because of the opportunities associated with generating sales inflow and fiscal revenues to the county. Allowing for development of a high-value chain with name recognition (such as a Cracker Barrel) at this site would help the County capture more through-traffic and sales.

Attention should be paid to gaining historic recognition for Cornersville's town center and for accessing grants or investment in rehabilitation and restoration of the town's historic buildings. There are opportunities in Cornersville and throughout the county for heritage tourism development, which supports the community's desire to retain a small town lifestyle. Heritage tourism, which has a more affluent market base, helps support local businesses by building the market base above a dependence on local households. The market base will support some additional retail and services in the downtown area, as outlined in the previous section of this report.

ACTIONS (SMR C-)

SMR C-1: Work with the Town of Cornersville to recruit high-value commercial and restaurant development to Exit 22 that serves interstate travellers and the local community.

SMR C-2: Support and/or assist the Town of Cornersville in adopting an Historic District (including National Register) for its Downtown to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.

FAYETTEVILLE HIGHWAY HERITAGE CORRIDOR

As noted above, there are opportunities for Marshall County to capture more of the heritage tourism market, which can not only help support existing businesses but also help the county capture more inflow sales and fiscal revenues generated by tourists and destination shoppers. In heritage tourism, it is important to establish visitor trails and corridors that link dispersed towns and historic sites together. There is already a Tennessee Whiskey Trail that accomplishes some of these objectives with a focus on the state's world-famous whiskey making sites and traditions. But there are opportunities for the county to build on its own strengths and promote heritage tourism along key corridors.

Fayetteville Highway is an excellent example of where such opportunities for heritage tourism can be captured through strategic promotion and development. This corridor is already used by tourists to access Jack Daniel's Distillery and the state's distillery route. Jack Daniel's attracts over 500,000 visitors in a normal year, so Marshall County has the opportunity to capture some of the spin-off from this existing visitor base. Fayetteville Highway includes important historic nodes for the county: Downtown Lewisburg, Belfast, and Petersburg.

Belfast. Belfast has the depot, a small café, and an antiques business. This community provides opportunities for capturing additional tourism-related potential if (as in Cornersville), the County could help facilitate property owners' access to grants for historic preservation and restoration through historic designation (as possible, as through the National Register). At a minimum, the County can enhance the physical infrastructure around Belfast and promote the site through corridor branding and marketing.

Petersburg. As noted previously, Petersburg has a wonderful town square with potential for some destination activity including restaurants, antiques, and live music. Petersburg could become a tourism destination and programmed into tour bus routes. It would be advisable for

Marshall County to work with Lincoln County and exposure opportunities for marketing this corridor in both counties. Lincoln County offers its heritage as the home of the “Lincoln County Process” for making whiskey, which has become the standard approved for Tennessee whiskey. Fayetteville and Lincoln County are starting to consider ways to enhance their whiskey trail heritage marketing, so this is an excellent time to consider “plugging” into those efforts for a bi-county Fayetteville Highway Heritage Corridor strategy.

ACTIONS (SMR FH-)

SMR FH-1: Adopt a Historic District for eligible buildings in Belfast to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.

SMR FH-2: Support and/or assist the Town of Petersburg in adopting an Historic District (including National Register) for its Downtown to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.

SMR FH-3: Work with state tourism officials to promote Fayetteville Highway as a heritage tourism corridor.

MOORESVILLE HIGHWAY CORRIDOR: ECONOMIC DEVELOPMENT GATEWAY

Marshall County has made investment in I-65 Commerce Park as an economic development employment node. As noted earlier, there are opportunities to enhance the Mooresville Highway corridor at Exit 32 by incorporating commercial activity in a well-planned “Gateway” node at that interchange. This gateway might include hotels and restaurants to help capture sales and fiscal revenues from I-65 inflow. A high-quality gateway might also help establish a brand for Marshall County and context for its economic development. The corridor itself might be branded as an economic development corridor to help encourage further development at I-65 Commerce Park and potential other sites

along the corridor between the interstate and Lewisburg. The County might also consider renaming the highway “Lewisburg Highway” or “Marshall County Highway” in order to strengthen the brand.

ACTIONS (SMR MH-)

SMR MH-1: Develop a vision and recruitment strategy to create a Gateway District at Exit 32 to include hotels, restaurants, and other retail benefitting from interstate access and the proximity to the I-65 Commerce Park.

RURAL SERVICE NODES

Several rural service nodes were identified as part of the planning effort that may present opportunities for further development. These include Farmington (US31 / TN64) and Caney Creek (TN272 / 99).

STRENGTHEN FARMINGTON AS A SERVICE NODE

Farmington’s location at the intersection of Nashville Pike (US31A), TN64 and CR271 helps to bring increasing traffic and exposure to this area. The node can be enhanced as a service and convenience node through signage and access to serve the surrounding farming community and pass-through traffic.

COUNTY-WIDE RECOMMENDATIONS

The County could benefit from a comprehensive wayfinding signage system that unifies all of its corridors and activity centers. This system could also reduce the multiple highway names, create gateways, identify important routes like the U.S. 23 Bicycle Route, and promote heritage tourism.

ACTIONS (SMR CW-)

SMR CW-1: Develop a County-wide signage and way-finding master plan.

3 | implementation





IMPLEMENTATION MATRIX

This chapter lists all of the Actions from Chapter 2 in a table along with useful information regarding time-frame, responsible party, and potential funding sources.

The timeframes have been defined as short term (0-2 years), medium term (3-5 years), and long term (6-10 years). Responsible parties include the County, meaning elected officials, appointed commissions, and specific departments, the municipalities, the State, and other organizations. Funding sources are generally classified as follows:

- » County: General Budget and Capital Improvement Budget items
- » Grants: In particular from the State Department of Commerce or the State Department of Transportation

As the Plan recommends, there should be an Implementation Committee that meets at least twice per year to review implementation efforts and sets priorities. The Implementation Matrix in this chapter can and should be used as a checklist to measure progress.

Action No.	Action	Page No.	Time-frame	Responsible Party	Funding Source
CORRIDORS PLAN GENERAL					
CP-1	Adopt this plan as official planning policy for Marshall County.	35	Short term	County Planning Commission/County Commission	NA
CP-2	Utilize the Marshall County Comprehensive Transportation Plan in conjunction with this plan when reviewing development and zoning requests to guide municipal decisions.	35	NA	Zoning Administrator/County Planning Commission/County Commission	NA
CP-3	Update the Marshall County Growth Plan.	35	Short term	County Commission	County
CP-4	Create an Implementation Committee that meets, at a minimum, twice a year to review progress toward implementation and make recommendations on prioritization.	35	Short term	County Commission	NA
CP-5	Issue an annual report on implementation progress.	35	NA	Implementation Committee/County Planning Commission	NA
CP-6	Coordinate and collaborate with municipalities to address growth and annex issues to the mutual benefit of everyone.	35	Short term	Implementation Committee/JECDB/Cities	NA
DOWNTOWNS					
D-1	Encourage Chapel Hill, Cornersville, and Petersburg to follow Lewisburg's lead in establishing a local Historic District to preserve their historic downtowns.	51	Medium term	Implementation Committee/JECDB	NA
D-2	Collaborate with each municipality to coordinate streetscape improvements, including wayfinding, to create a cohesive environment that complements and ties the County together.	51	Long term	County Commission/JECDB	NA
D-3	Coordinate with the municipalities to improve multi-modal connectivity between the downtowns and key public assets.	51	Long term	County Commission	County/Cities/TDOT
D-2	Collaborate with municipalities to conduct joint training workshops with City/County staff, Planning Commissions, and Boards of Zoning Appeals.	51	Short term	County/Cities	County/Cities
DUCK RIVER CORRIDOR					
DRC-1	Establish a Blue Way trailhead-type facility on the north side of the Duck River near the Caney Spring area.	55	Medium term	County Commission	County/Grants
DRC-2	Promote the Caney Spring area as a hub for master planned commercial associated with the Duck River Blueway.	55	Medium term	JECDB	County

Action No.	Action	Page No.	Time-frame	Responsible Party	Funding Source
DEVELOPMENT REGULATIONS					
DR-1	Simplify Land Use Table to avoid redundancy and confusion in allowable land uses.	56	Short term	County Planning Commission/County Commission	County
DR-2	Allow mixture of uses within a single building and/or district for appropriate "Place Types" in the County.	56	Short term	County Planning Commission/County Commission	County
DR-3	Simplify and/or clarify the Cluster Residential Development standards to permit a mixture of lot and housing types.	56	Short term	County Planning Commission/County Commission	County
DR-4	Add a new zoning district or planned development overlay district to allow for compact, walkable neighborhoods.	56	Short term	County Planning Commission/County Commission	County
DR-5	Revise the bulk requirements of the Commercial zoning districts as they relate to building placement and height, to conform to this plan.	56	Short term	County Planning Commission/County Commission	County
DR-6	Consolidate, revise, and add standards to address the design of commercial buildings.	56	Short term	County Planning Commission/County Commission	County
DR-7	Provide clear design direction on landscape buffers where appropriate based on adjacent land uses.	56	Short term	County Planning Commission/County Commission	County
DR-8	Add standards to ensure an appropriate separation distance between corridors and residential development.	56	Short term	County Planning Commission/County Commission	County
DR-9	Provide specific standards for landscaping and screening as it relates to parking along corridors, internal parking lots, outdoor equipment, and refuse storage.	56	Short term	County Planning Commission/County Commission	County
DR-10	Add standards for parking lot design and access.	56	Short term	County Planning Commission/County Commission	County
DR-11	Improve standards for lighting as it relates to the height of fixtures and the reduction of light pollution.	56	Short term	County Planning Commission/County Commission	County
DR-12	Revisit signage standards and adjust for different contexts as established by the intent for each "Place Type."	56	Short term	County Planning Commission/County Commission	County
DR-13	Modify and adopt the International Property Maintenance Code for commercial properties along the corridors.	56	Short term	County Planning Commission/County Commission	County
DR-14	Update Site Plan requirements in the Zoning Resolution to ensure that applicants provide the proper information to review development proposals against new standards in the Zoning Resolution.	56	Short term	County Planning Commission/County Commission	County

Action No.	Action	Page No.	Time-frame	Responsible Party	Funding Source
STRATEGIC MARKET RECOMMENDATIONS					
SMR L-1	Focus Downtown business recruitment efforts on anchor-type uses such as full-service dining and entertainment establishments serving tourists and the local market.	58	Short term	Lewisburg/JECDB	City/County
SMR L-2	Identify potential sites along the Bypass and/or Exit 32 that can accommodate a home center as part of a mixed-use development.	58	Short term	Lewisburg/JECDB	NA
SMR L-3	Conduct a market analysis for lodging and related uses near Exit 32 and the I-65 Commerce Park.	58	Medium term	County/JECDB	County
SMR CH-1	Work with the Town of Chapel Hill to identify locations for a future Community Center to the north or west of Town to relieve development pressure near the intersection of 99/31A/270.	59	Medium term	Chapel Hill/JECDB	NA
SMR CH-2	Implement the Comprehensive Transportation Plan and the Chapel Hill Bicycle and Pedestrian Study as it relates to future roadway, bicycle, and pedestrian connectivity to provide alternate routes to 31A.	59	Long term	Chapel Hill/County	City/County/TDOT
SMR CH-3	In recruitment efforts and design review processes, encourage new development to be master planned and well-connected in a manner that reduces congestion on key corridors, such as 31A.	59	Short term	County/Chapel Hill	NA
SMR CH-4	Identify and recruit recreation-related businesses at strategic locations along the 99 corridor to leverage the Duck River as a key recreational asset along with Henry Horton State Park.	59	Medium term	County/JECDB	NA
SMR C-1	Work with the Town of Cornersville to recruit high-value commercial and restaurant development to Exit 22 that serves interstate travellers and the local community.	60	Short term	Cornersville/JECDB	NA
SMR C-2	Support and/or assist the Town of Cornersville in adopting an Historic District (including National Register) for its Downtown to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.	60	Medium term	Cornersville/County	NA

Action No.	Action	Page No.	Time-frame	Responsible Party	Funding Source
STRATEGIC MARKET RECOMMENDATIONS (cont)					
SMR FH-1	Adopt a Historic District for eligible buildings in Belfast to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.	61	Short term	County Planning Commission/County Commission	County
SMR FH-2	Support and/or assist the Town of Petersburg in adopting an Historic District (including National Register) for its Downtown to preserve its historic character as well as make it eligible for grants and historic tax credits to aid with preservation.	61	Medium term	Petersburg/County	NA
SMR FH-3	Work with state tourism officials to promote Fayetteville Highway as a heritage tourism corridor.	61	Short term	County/JECDB	NA
SMR MH-1	Develop a vision and recruitment strategy to create a Gateway District at Exit 32 to include hotels, restaurants, and other retail benefitting from interstate access and the proximity to the I-65 Commerce Park.	61	Long term	County/JECDB/Lewisburg	County/City
SMR CW-1	Develop a County-wide signage and way-finding master plan.	61	Medium term	County	County/Grants

appendices



MARSHALL COUNTY
Corridor Retail Market Analysis



Prepared March 14, 2021
For Common Ground
On behalf of Marshall County Government

INTRODUCTION

This report provides findings from a Retail Market Analysis conducted to determine the potentials for retail/commercial development within the highway corridors in Marshall County. The market analysis examined existing conditions and forecasted demand for retail business space within the competitive market context. Based on the market potentials, strategic recommendations are made within key submarkets, nodes and corridors within the county to help guide the planning process.

Section 1 of this report summarizes existing conditions. An economic overview is provided along with an assessment of existing retail/commercial market conditions. In Section 2, retail demand is forecasted for Marshall County trade areas, based on household expenditure potentials as well as tourism inflow. Section 3 provides a summary of retail development potentials within the key submarkets and nodes within the county. Based on these findings, Section 4 includes strategic recommendations to help leverage development and capture business and fiscal benefits for Marshall County.

Section 1. EXISTING CONDITIONS

This section summarizes existing conditions relating to and impacting on the retail market in Marshall County. An economic overview provides context for growth of Marshall County and of its local market base. The overall retail market conditions are summarized, in terms of inventory, market indicators, the existing retail business mix, and physical characteristics of the county's retail business environment. Descriptions of the business mix and retail business environment in each of the county's commercial corridors (and Downtown Lewisburg) are also provided. These conditions were assessed based on information collected through field reconnaissance and site assessment, interviews with area brokers and businesses, a building-by-building inventory, and data generated through the County Assessor's office.

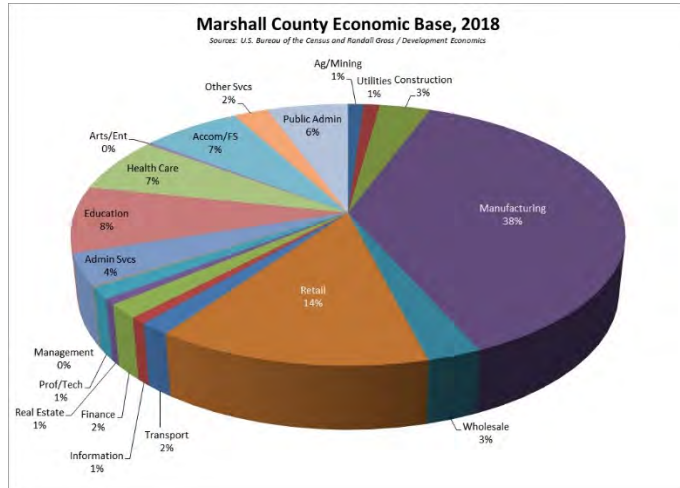
Economic Overview

Marshall is a county in transition. While the county still retains its rural Middle Tennessee agricultural character, northern portions of the county now support an emerging suburban commuter node. The county has seen consistent population growth of about 4,000 to 5,000 people per decade, to an estimated total of 34,375 according to the Census Bureau's 2019 American Community Survey. But there is a growing influx of commuters as well as retirees from other parts of the country.



The Census Bureau now defines Marshall County as part of the Lewisburg Micropolitan Area and as part of the Consolidated Nashville-Davidson--Franklin-Murfreesboro Metropolitan Statistical Area (CMSA). The Nashville CMSA has a population in excess of 2.1 million and covers 15 counties in Middle Tennessee. This metropolitan area has been adding about 35,000 people each of the last several years, roughly equivalent to adding the entire population of Marshall County each year.

Marshall County had a total of about 9,500 jobs in 2018. The county's employment base has long been dominated by manufacturing, which still accounts for nearly 4 out of every 10 jobs in the county. Retail trade is also an important employer, generating about 14% of all jobs. Other key employers include education (8%), health care (7%), accommodation & foodservice (7%), and public administration (6%).



The county was severely impacted by several large closures and the Great Recession of 2008-09, losing more than one-third of its job base. Nearly all of this loss was concentrated in the manufacturing sector, where Marshall County's employment fell from 5,831 in 2002 to just 2,253 by 2010. Several other industries, including retail trade, have seen increasing employment since 2002. Much of that growth has been spurred by continued residential development, with the addition of new households increasing demand for retail goods and services in the local economy. Tourism to Henry Horton State Park and other sites also helps spur demand for retail and restaurants in the county.

By 2018, the county had regained 26% of the jobs it had lost in the previous decade, including a growing number in the manufacturing sector. Employment in that sector increased by more than 1,300 to 3,577. Still, employment in the sector is far from its previous peak. Regardless (or despite) of this recovery, more than 70% of Lewisburg's working adults commute out of the county, with about 50% commuting into the Nashville MSA. Marshall County's at-place employment trends are summarized in the Appendix of this report.

Overall Retail Market Conditions

Information was collected and analyzed on overall retail market conditions for Marshall County as noted previously. Key findings from analysis of this information is provided below.

Inventory

The building-by-building inventory determined that Marshall County has a total of about 1,370,000 square feet of retail/commercial space and 272 retail businesses. This square footage is equivalent to one super-regional shopping mall.

For example, Cool Springs Galleria in Williamson County is just slightly smaller, at 1,141,685 square feet.

Market Indicators

There are no commercial brokers in the region that track Marshall County's retail real estate market. So, market indicators like occupancy, class, and age of commercial building stock had to be established based on the inventory information built from the "ground-up." Information from rents was gleaned from commercial listings and individual realtors.

Occupancy. Total vacancy is just over 14.0%, which is significantly higher than one would find in a "healthy" retail real estate market where 5.0% vacancy would be considered the norm. That being said, a significant share of the county's retail vacancy is concentrated in a few large spaces in strip centers, some of which were vacated by chains like Goody's due to company-wide failures unrelated to the local market.¹ There is also a large number of vacant gas stations.

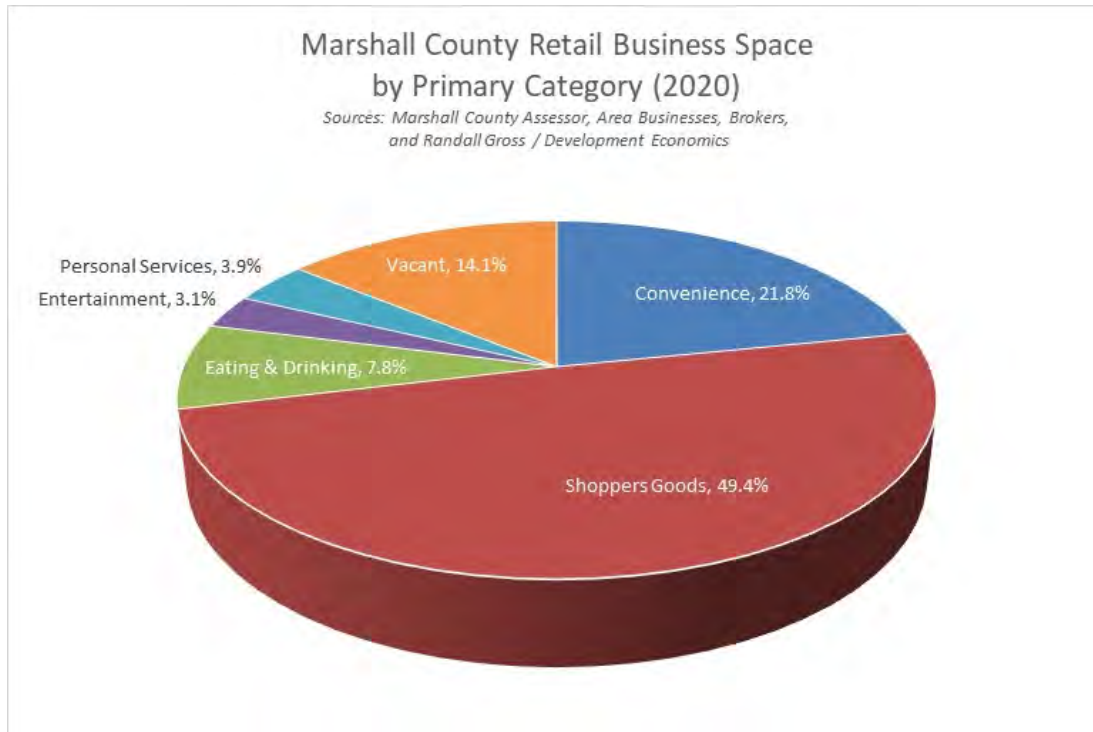
Rents. Marshall County rents range wildly based on location, building conditions, and other factors. There is insufficient data to determine the average market rent. However, relatively new well-located space on the Bypass, such as in Governor's Plaza, rents for \$15.00 per square foot.

Sales. Marshall County had total retail sales of \$314.7 million in 2017, according to the Census of Retail Trade. Based on the inventory, these totals would yield average sales of about \$230 per square foot. However, this number may be under-estimated, given that it was generated for a Census base of 103 establishments and the inventory completed in 2020 for this market study identified and verified a total of 272 retail businesses.

Existing Retail Business Mix

Based on field reconnaissance and inventory, almost one-half of retail businesses in Marshall County would be classified as Shoppers Goods stores, meaning that they sell goods for consumers who comparison shop such as for apparel, furniture, automobiles, toys, or artwork. The overall retail business mix is summarized in the following chart.

¹ Goody's was a wholly-owned subsidiary of Stage Stores, Inc. which filed for Chapter 11 Bankruptcy and announced on May 20, 2020 that it would liquidate all Goody's stores. Terri, Harper, The Mohave Daily News (August 6, 2020). "Stage parent company scraps plans for conversion into Gordmans."



About 22% of Marshall County retail businesses would be classified as Convenience Goods; they sell products for immediate consumption and are conveniently located. About 7.8% of retail/commercial space is used for restaurants and drinking establishments, 3.9% for personal service establishments (e.g., hair and nail salons), and 3.1% for entertainment venues.

Appendix Table 2 shows in more detail how this space is disaggregated by type of retail establishment. The table indicates, for example, that there are three grocery stores with a total of 102,500 square feet in the county's commercial corridors. The table indicates a relatively large number of gas stations (28, with a total of nearly 100,000 square feet), tobacco shops (8, with 15,000 square feet), general merchandise dollar stores (14, 140,000 square feet), used merchandise & antiques stores (13, with 80,000 square feet), and auto parts businesses (9, with 44,000 square feet).

At the same token, there are relatively few (or out-right gaps in the supply of) specialty food stores (0, like bakeries, ethnic food markets, etc.), home centers (only two small suppliers), book and music stores (0), and various types of specialty stores including gift shops, toy & game stores, luggage/leather stores, office supply businesses, sporting goods stores (beyond gun stores), and snack or coffee shops (0, like Starbucks).

Physical Characteristics

Field reconnaissance and selected data were used to identify physical characteristics or relating factors impacting on the retail market in Marshall County. Such factors include traffic & exposure, corridor identity and naming, gateways and branding, and retail business space.

Location. Marshall County is located in south central Middle Tennessee. As noted before, it is defined statistically as the Lewisburg Micropolitan Area and forms part of the Nashville CMSA. Lewisburg is located about 56 miles or 54 minutes (in normal driving conditions) from Downtown Nashville and 41 miles (41 minutes) from Cool Springs. But Chapel Hill is located only about 31 miles (36 minutes) from Cool Springs and 22 miles (28 minutes) from the commercial heart of Spring Hill. Proximity to large commercial nodes in a more economically-integrated region has created competition to Marshall County's traditional downtowns and corridor retail businesses, especially as more local residents commute elsewhere for work.

Traffic & Exposure. Marshall County has excellent accessibility and exposure to Interstate 65, which forms a north-south corridor connecting the Chicago region down to Nashville and south from Marshall County to Birmingham. Further, Marshall County has several access points along I-65, near Franklin Pike (average daily traffic count of 27,567)², Mooresville Pike (27,210)³. There is also significant traffic along the Bypass and Nashville Pike, the primary north-south highway corridor through the county. The intersection of North Ellington Parkway at Nashville Pike has traffic counts of 17,362.⁴

Corridor Identity and Naming. There is confusion for tourists and for marketing and branding related to the naming of highway corridors throughout Marshall County. For example, US31A merges with US431 and TN11 to become Ellington Parkway, also known as "The Bypass." East Commerce Street is US431 Business, which becomes Fayetteville Highway. US31A (TN11) South is variously known as Pulaski Highway, Lewisburg Highway, Sam Davis Highway, and Cornersville Highway, probably because of all of the destinations reached by this road from different parts of the county. Second Avenue North is US31A (North), which is also known as Nashville Highway, Horton Highway, Sam Davis Highway (North), and Verona Road. For the purposes of tourism marketing and branding, not to mention simplicity sake, it may be good to better coordinate signage and branding.

² Tennessee Department of Transportation AADT(2018)

³ Ibid.

⁴ Ibid.



Design and Branding. Linked with the naming challenge is the general lack of branding in signage and gateways that could help in marketing the county for tourism and destination shopping. Currently, signage consists of basic standard green signs. Municipalities in the county lack streetscape, signage controls, and pedestrian accommodation that improve corridor aesthetics and enhance the retail experience.

Retail Buildings. The county's retail infrastructure is characterized by traditional and historic downtown architecture, contrasted with standard franchise formats in the various corridors. Buildings are in generally good condition, although there may be a need for restoration of more of the historic and vintage buildings to support destination retail activities.

Commercial Corridors

Detailed reconnaissance, inventory, and analysis was conducted for each of the county's main highway corridors in order to inform the corridor planning process and understand the market dynamics within these corridors and sub-markets. A description of existing market conditions is provided below for each of the main commercial corridors. For the sake of simplicity, each corridor is identified by their destination (e.g., "Mooreville" or "Nashville").

Mooreville Highway (SR373)

Exit 32 provides the closest interstate highway access to Lewisburg, although most commuters traveling south from Nashville will exit further to the north. There is a small highway convenience commercial node at the exit, with limited activity and branding. To the west of the exit are several vacant gas stations. Half-way toward Lewisburg is the I-65 Commerce Park, an economic development engine for the county that has attracted some industrial development. Overall, there is about 127,000 square feet of retail/commercial use within the

Mooresville Highway Corridor, with a very high vacancy rate of 22%. Among the locally owned commercial uses in the corridor are a bowling alley, donut shop, and fireworks retailer. Marshall County Plaza is a 95,000 square-foot discount-oriented strip center anchored by a Dirt Cheap store, IGA, and a Dollar General.

Fayetteville Highway (US431)

The Fayetteville Highway Corridor has a total of about 88,000 square feet of retail/commercial use. Vacancy is also relatively high in this corridor, with 17% of space vacant. The merchandise mix includes convenience, general merchandise, and antique store uses. The corridor is anchored by several historic nodes that establish a unique historic character for this part of the county.

Belfast. The middle part of the corridor is anchored by Belfast, a place that “time forgot.” Several historic buildings date back to 1878, making the node one of the oldest and most historic in the county. An historic railroad depot testifies to the community’s heritage, and a small antiques store and a café are among the only operating businesses. Only a new Dollar General franchise store disrupts the historic ambiance of the node.



Petersburg. Petersburg straddles the Lincoln County Line. The central part of the town is characterized by historic architecture but, unlike Belfast, offers more of a traditional downtown square with existing businesses and a building stock including an old theatre that buttress the town’s possible tourism draw.



The Petersburg “Pickers and Gridders” meet in this town square, with live music enhancing the town’s opportunities for attracting destination visitors.

Pulaski Highway (US31A-South)

Exit 22 provides additional interstate access to Marshall County. This node offers gas, convenience, adult entertainment, and personal service uses straddling Giles County. Overall, the corridor has about 116,000 square feet of



retail/commercial space and a very high vacancy rate of 23%. Exit 22 is perhaps best known as the location of The Tennessean Truck Plaza, which is among the most visible and well-marketed retail businesses in Marshall County.

Cornersville. The small town of Cornersville forms a hub in this corridor for southwest Marshall County. Cornersville has several historic buildings and also celebrates its musical heritage through the Briar Patch Opry, with live music and dancing. Cornersville has a total of about 50,000 square feet of commercial building space.



Nashville Highway (US31A-North)

Nashville Highway functions as the transportation “spine” of Marshall County, covering the length of the county from north to south and connecting the county’s two largest towns. The county’s largest visitor attraction, Henry Horton State Park, is also located in this corridor, bringing 700,000 visitors per year and opportunities for commercial spin-off.



The corridor has a total of about 280,000 square feet of retail and commercial use, with a moderately high 11% vacancy rate. The corridor offers a somewhat broader and more diverse retail business mix than others in the county, with groceries, hardware stores, the Lewisburg Flea Market, gas & convenience stores, general merchandise stores, antiques, auto dealerships, and a variety of

restaurants. Among the diverse restaurants located in the corridor are Soul Train, Huddle House, Yamato, Las Fiestas, Mopey’s, and Country Diner.

Chapel Hill. The county's second largest town and a hub for residential development, is situated along this corridor. The town is experiencing "growing pains," as it balances the amenities of a traditional small-town lifestyle with suburban residential development and increased traffic congestion. The small historic downtown area offers boutique, flower shop, and antique stores, as well as auto parts, tanning, and liquor businesses.

Downtown Chapel Hill has become an increasingly congested node as commuter traffic is funneled through the historic town in route to Spring Hill, Cool Springs, and Nashville. More suburban commercial development has occurred on the southern end of the town, surrounding Brook's Grocery (formerly Rex's), although new residential development has mainly occurred to the northeast and west of Chapel Hill. Situating commercial development at the opposite end of a town center from new residential development may compound problems with traffic congestion in the corridor.



The Bypass (US31A / US431)

The Bypass (Ellington Parkway) comprises the major commercial corridor for Marshall County, generating a significant share of the county's retail sales and tax revenue. The corridor has more than 630,000 square feet of retail and



commercial use, or nearly one-half of all retail business space in the county. This commercial activity complements and benefits from the institutional base in the corridor, anchored by Marshall Medical Center, Columbia State Community College, and nearby Marshall County High School; as well as from hotels, Jones Field, and other key drivers.

Major retail anchors and clusters in this corridor include the following, all of which draw traffic from throughout the county and beyond. Walmart is often a destination that draws traffic from neighboring counties that may not have access to the store. However, all of the county seats in surrounding counties do have that

access, so the destination draw and sales “inflow” generated by Walmart to Marshall County is minimized.

- Walmart (155,000sf)
- Kroger (est. 55,000sf)
- The Acres Shopping Center (130,000sf)
- Parkway Shoppes (56,000sf)
- Auto Dealerships
- 15 “Fast-Food” Restaurants

The Bypass has both the highest commercial traffic and (not-coincidentally), the lowest vacancy rate in Marshall County. But vacancy is still higher than acceptable levels, at 10%. The overall aesthetics and pedestrian environment on The Bypass are of a marginal quality but are consistent with (and indistinguishable from) commercial corridors throughout the country. As shown in the image above, there is significant misallocation and under-utilization of land, resulting in missed opportunities for maximizing value and fiscal returns to Marshall County.

Downtown Lewisburg

While not technically a “corridor,” Downtown Lewisburg is nevertheless the hub for the corridor “spokes” that radiate throughout the county. All of Marshall County’s major corridors either converge in Downtown Lewisburg or form a bypass around it. Downtown Lewisburg is also home to County Government and is the historic center of the largest city in the county, so its influence on the retail market is substantial.



Downtown Lewisburg has a total of 135,000 square feet of retail/commercial space, ranking it as the third largest commercial “corridor” in the county after The Bypass and Nashville Highway. Vacancy is relatively high, at 21%, but unlike the highway corridors, vacancy is dispersed in a number of smaller buildings and storefronts rather than being concentrated in one or two large chain “boxes.”

The Downtown tenant mix includes a pharmacy, furniture stores, apparel stores, antiques, and personal services. The Downtown area is lacking, however, in dining and entertainment – other than the Marshall County Community Theater, an important anchor. The Downtown area has beautiful historic architecture and provides a pedestrian-friendly, walk-able environment for shoppers.

Section 2. RETAIL DEMAND

An analysis of current and future retail demand was conducted for Marshall County. Findings from this analysis were generated based on an assessment of household demand and tourism-generated demand for retail goods and services. Household trade areas were determined for the county. Demographic trends and forecasts were analyzed for those trade areas and used as the basis for forecasting retail expenditure potentials. Tourism flow was also examined for Marshall County, with tourism retail expenditures also forecasted. Findings from these analyses are summarized below.

Retail Trade Areas

Marshall County is a broad geographic area with multiple retail nodes and commercial corridors, each of which drawing consumers from different directions. As a result, the trade areas were defined based on the location of the county's nodes or sub-markets.

• Trade Areas

- **A:** Lewisburg
- **B:** Chapel Hill
- **C:** Cornersville
- **D:** Petersburg
- **E:** Lynville
- **F:** Unionville



The sub-markets that draw consumers for Marshall County businesses include Lewisburg (Trade Area "A"), Chapel Hill ("B"), Cornersville ("C"), Petersburg ("D"), Lynville ("E") and Unionville ("F"). The latter two nodes are not located in Marshall County but their trade areas overlap with the county and provide a source of consumer support to Marshall County businesses. Because of competition from other nodes in surrounding counties, Marshall County's overall trade area (the composite of these six sub-markets) does not extend far into surrounding areas with the exception of Lynville and Unionville. Overall, the trade areas represent about 75 to 80% of all trade that would be generated to Marshall

County retailers, with the remainder generated from tourists, commuters, and other traffic from outside of the county including travelers along I-65.

Demographic Analysis

Marshall County had a total 2020 estimated population of 34,558, according to Claritas, Inc., a national marketing database company whose demographic data is used as the basis for the Nielsen TV panels. The county's population has increased by 3,941 or 12.9% since 2010, based on the Claritas estimates. The county's household base, which forms the basis for retail expenditures, increased by 1,575 (13.3%) to 13,425. A faster increase in households than in population indicates a declining average household size. Demographic trends in key factors for each of the sub-markets is summarized below.

Table 1. DEMOGRAPHIC TRENDS, RETAIL TRADE AREAS, MARSHALL COUNTY, 2010-2020				
Factor	2010	2020	2010-2020 Change Number	Percent
<u>Trade Area A-Lewisburg</u>				
Population	21,371	23,518	2,147	10.0%
Households	8,375	9,292	917	10.9%
HH Income	\$ 47,806	\$ 52,695	\$ 4,889	10.2%
<u>Trade Area B-Chapel Hill</u>				
Population	6,719	8,347	1,628	24.2%
Households	2,482	3,070	588	23.7%
HH Income	\$ 53,685	\$ 80,171	\$ 26,486	49.3%
<u>Trade Area C-Cornersville</u>				
Population	1,636	1,762	126	7.7%
Households	648	702	54	8.3%
HH Income	\$ 48,242	\$ 60,584	\$ 12,342	25.6%
<u>Trade Area D-Petersburg</u>				
Population	891	931	40	4.5%
Households	345	361	16	4.6%
HH Income	\$ 32,091	\$ 51,031	\$ 18,940	59.0%
<u>Trade Area E-Lynnville</u>				
Population	1,070	1,072	2	0.2%
Households	420	423	3	0.7%
HH Income	\$ 55,903	\$ 55,939	\$ 36	0.1%
<u>Trade Area F-Unionville</u>				
Population	1,101	1,117	16	1.5%
Households	411	418	7	1.7%
HH Income	\$ 69,422	\$ 78,035	\$ 8,613	12.4%
Note:	Income expressed in constant 2019 dollars.			
Sources:	Claritas, Inc. and Randall Gross / Development Economics.			

The county's urban areas have seen the fastest growth over the past ten years, according to the Census and Claritas data. Chapel Hill is growing fastest,

with a 24.2% increase in population and 23.7% increase in households over the past ten years. Chapel Hill population and households stood at about 8,400 and 3,100, respectively, in 2020. An influx of higher-income households from other areas has spurred significant changes in Chapel Hill demographics. Household incomes are by far the highest in the county (estimated at \$80,170, compared to a county-wide average of \$70,100), and are growing fastest, having increased by 49.3% in constant dollars (after adjusting for inflation) since 2010. That 6.2% annual increase in income far outstrips income growth in most other areas of the county. The combination of household and income growth concentrated in Chapel Hill has had a positive impact on retail demand in that area.

Lewisburg has also seen demographic growth since 2010, but at a much more modest pace that aligns with traditional growth patterns in the county. The Lewisburg submarket's population increased by about 2,150 or 10.0% to 23,518. Household incomes also increased by about 10% (adjusting for inflation) but remain lower than in Chapel Hill and the county as a whole, at an average \$52,700. The slowest growth has been in the Lynville and Unionville submarkets, but both of their nodes lie outside of Marshall County.

Demographic Forecasts

Many of the same demographic growth trends are expected to continue over the next five to seven years. Population and household growth will remain relatively strong, if slightly slower. The annual rate of growth in the trade areas as a whole is projected at about 1.2%, versus the 1.3% annual growth seen in the area between 2010 and 2020. The fastest household growth will again be concentrated in Chapel Hill and, to a lesser extent, Lewisburg. Chapel Hill is expected to grow by 8.9% (adding about 740 residents) by 2025, the Lewisburg area by 5.6% (adding 1,300).

The Cornersville area will grow about nearly 5.0%, adding about 90 to its population, for a total of approximately 1,850. The Petersburg, Lynville, and Unionville sub-markets will see slower growth than other parts of the trade area.

Incomes are estimated to have fallen during the recession induced by the COVID Pandemic, with business closures, higher unemployment, and business expansion on hold. As the pandemic and its economic impact is expected to subside over the next year, businesses will again begin to reopen and expand, unemployment will continue to fall, and incomes will gradually begin to rise. Overall, however, incomes will expand at a much slower average rate over the 5-year period to 2025 as they did previously. It is expected that Lewisburg incomes will only increase by about 0.1% (in real terms) over the five year period. Chapel Hill incomes will again increase the fastest, as newcomers bring higher incomes to the area. The Lynville submarket is expected to see a decrease in average household incomes over the 5-year period.

Table 2. DEMOGRAPHIC FORECASTS, RETAIL TRADE AREAS, MARSHALL COUNTY, 2020-2025				
Factor	2020	2025	2020-2025 Change Number	Percent
<u>Trade Area A-Lewisburg</u>				
Population	23,518	24,837	1,319	5.6%
Households	9,292	9,839	547	5.9%
HH Income	\$ 52,695	\$ 52,748	\$ 53	0.1%
<u>Trade Area B-Chapel Hill</u>				
Population	8,347	9,088	741	8.9%
Households	3,070	3,340	270	8.8%
HH Income	\$ 80,171	\$ 81,270	\$ 1,099	1.4%
<u>Trade Area C-Cornersville</u>				
Population	1,762	1,848	86	4.9%
Households	702	738	36	5.1%
HH Income	\$ 60,584	\$ 60,928	\$ 344	0.6%
<u>Trade Area D-Petersburg</u>				
Population	931	965	34	3.7%
Households	361	374	13	3.6%
HH Income	\$ 51,031	\$ 51,082	\$ 51	0.1%
<u>Trade Area E-Lynville</u>				
Population	1,072	1,094	22	2.1%
Households	423	432	9	2.1%
HH Income	\$ 55,939	\$ 55,771	\$ (168)	-0.3%
<u>Trade Area F-Unionville</u>				
Population	1,117	1,143	26	2.3%
Households	418	428	10	2.4%
HH Income	\$ 78,035	\$ 78,036	\$ 1	0.001%
Note:	Income expressed in constant 2020 dollars.			
Sources:	Nielsen & Randall Gross / Development Economics.			

TPI and Retail Expenditure Potentials

The key indicators of retail demand, Total Personal Income (TPI) and the share of income spent on retail expenditures, are expected to continue increasing over the next five years in tandem with households and modest income growth. TPI was estimated at \$853 million in 2020, growing by about \$59 million or 6.9% to \$912 million by 2025-26. The Lewisburg submarket has the highest TPI, at \$489.6 million and will add \$29.3 million (6.0%) by 2025. However, Chapel Hill's TPI will grow the fastest (10.3%) due to the combination of high household growth and continued income expansion. The Lynville submarket will experience the slowest growth in TPI, about 1.8%. TPI forecasts are summarized below.

Table 3. TPI FORECASTS, MARSHALL COUNTY RETAIL TRADE AREAS, 2020-2025				
Trade Area	TPI (000)		2020-2025 Change	
	2020	2025	Amount	Percent
A-Lewisburg	\$ 489,642	\$ 518,985	\$ 29,343	6.0%
B-Chapel Hill	\$ 246,125	\$ 271,441	\$ 25,316	10.3%
C-Cornersville	\$ 42,530	\$ 44,965	\$ 2,435	5.7%
D-Petersburg	\$ 18,422	\$ 19,105	\$ 682	3.7%
E-Lynnville	\$ 23,662	\$ 24,093	\$ 431	1.8%
F-Unionville	\$ 32,619	\$ 33,399	\$ 781	2.4%
Total	\$ 853,000	\$ 911,988	\$ 58,988	6.9%
Notes:	Total personal income (TPI) expressed in thousands of constant 2019 dollars.			
Source:	Randall Gross / Development Economics.			

Retail expenditure potentials will total about \$389 million, representing an increase of \$28 million or 7.7% over the five-year period. The largest expenditures will be in groceries, gas, motor vehicles, general merchandise, and restaurants. Each sub-market will capture a respective share of trade area expenditure potential, as discussed in the section that follows.

Tourism-Generated Demand

The largest tourism generator in the county is Henry Horton State Park, which attracts about 700,000 people per year. However, many thousands also pass through the county each year along I-65 or in route to major tourist attractions like Jack Daniel's Distillery, located nearby. This analysis has conservatively estimated tourism in the county at about 878,000 visitors per year, including those who stay overnight or stop in the county as part of a trip. Each party of visitors to the county is estimated to spend an average of \$184.42 per trip (including portions in Marshall County and elsewhere), for a total of \$161.9 million per year. Of this amount, about \$47.6 million is spent in restaurants, \$15.9 million on retail trade, and \$8.6 million on entertainment. Again, the county and its corridors capture only a portion of this demand, but there are opportunities to increase capture and expand the sales base.

Section 3. CORRIDOR POTENTIALS

As noted previously, Marshall County only captures a portion of trade area retail expenditures and tourism sales. The county's retailers must compete within a broader region with economic nodes that are increasingly integrated. Being at the southern rim of a large metropolitan area creates challenges for Marshall County businesses that are competing with other businesses that are located closer into the center of this metropolitan market. On the other hand, Marshall County is the first portion of the market to be approached from the south, thus providing opportunities to capture northbound traffic before sales are deposited in other Nashville-area locations. This section examines each of the county's sub-market potentials within the competitive regional context.

Competitive Framework

As noted above, Marshall County operates within a competitive retail environment. This environment is always shifting due to the changing nature of retail trade and growth in Middle Tennessee. But the COVID Pandemic has accelerated some of these changes, particularly the shift to online purchasing, which create new challenges to existing and prospective "brick-and-mortar" businesses.

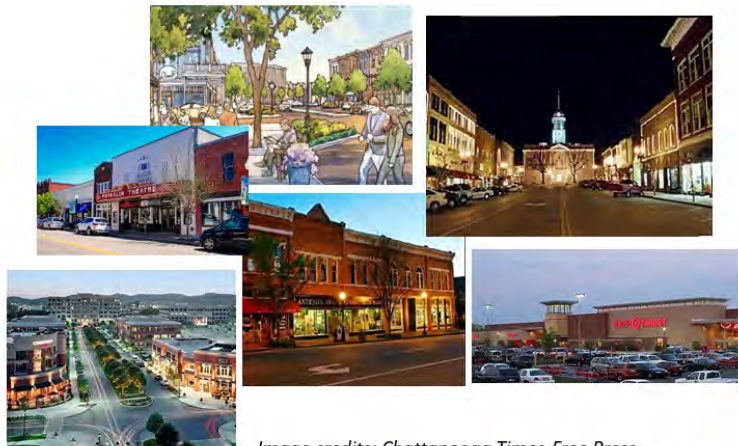


Image credits: Chattanooga Times-Free Press, Travelocity, 906 studios, GBT Realty, Seven Oaks Co, Livability.com

Among the competitive retail nodes in the region are Spring Hill and Columbia, probably the closest major commercial nodes within the commuter shed. Columbia offers an increasingly attractive downtown environment with restaurants and shopping that compete directly with Downtown Lewisburg for specialty goods and dining. Spring Hill offers competitive commercial use along with dining and entertainment that also compete for Marshall County sales.

Towns to the south, west, and east like Shelbyville and Pulaski provide a similar mix of quaint downtown shopping and highway-oriented franchises to compete with Marshall County. Further north are large-scale commercial nodes like Franklin and Cool Springs that again provide that mix of historic, walk-able shopping districts as well as suburban malls and chain stores.

Lewisburg Retail Potentials

The market analysis determined that there is an over-supply of retail space in the Lewisburg sub-market. While there is gross demand for about 70,000 square feet of additional retail use, the submarket has an existing inventory of 193,000 square feet of vacant commercial space, yielding an oversupply of 124,000 square feet. Some of the submarket's vacant space is found in a number of smaller spaces in the downtown area, but there are several large "box" stores that, if filled, could easily reduce the "overhang" of vacant space in the submarket. Among these spaces are the 27,800 square-foot Goody's space at The Acres and 20,000 square feet at Marshall County Plaza, accounting for roughly one-third of all of Lewisburg's vacant space.

Table 4. SUMMARY DESTINATION RETAIL POTENTIAL BY USE LEWISBURG, 2020-2025				
Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2020	2025		
Convenience	188,446	200,156	205,388	(5,232)
Shoppers Goods	514,950	548,674	558,922	(10,248)
Eating/Drinking	118,647	125,511	84,172	41,340
Limited Service	50,047	52,368	39,858	12,509
Full Service	51,676	55,121	42,403	12,718
Entertainment	68,930	71,186	41,906	29,280
Personal Services	48,526	51,650	37,445	14,205
TOTAL	939,499	997,178	927,833	69,345
Existing Vacant			192,964	
Net New Space				(123,619)
Less Home Center				(70,319)
Note:	Assumes Pro-active Internal/External Recruitment.			
Source:	Randall Gross / Development Economics.			

The over-supply of retail is concentrated in certain uses, including convenience stores, gas stations, and general merchandise ("dollar") stores. Despite the over-supply in these categories, there are other retail categories where there is net demand. For example, there is net demand for a home center store (e.g., Lowe's, Home Depot), but this demand is not sufficient to support the

required floor plate for these chains at this time. Appendix Table 3 details Lewisburg's retail potential within specific retail business categories.

Business Opportunities

Based on the market analysis, several opportunities are recommended for strengthening the existing business mix and recruiting new retailers to fill vacant spaces. This recommended mix includes about 100,000 square feet of retail uses, although some of this retail potential could be absorbed by existing stores. For example, Walmart or other existing businesses are likely to absorb at least some of the unmet demand for home center sales.

Table 5. RETAIL BUSINESS OPPORTUNITIES, LEWISBURG	
Type of Business	Square Feet
<i>Home Center (sales absorbed by WalMart)</i>	53,300
Entertainment/Drinking Establishments	22,000
Diverse Full-Service Restaurants (& LS at I-65)	20,000
Personal Services	14,000
Gifts/Books & Music/Toys	13,000
Snack/Coffee Shops	9,700
Specialty Food (Bakeries, etc)	5,000
Home Furnishings	6,500
Liquor/Wine Store	4,800
Shoes & Accessories	4,100
Total (Less Home Center)	99,100
Source: Randall Gross / Development Economics.	

Much of the Lewisburg submarket's net potential is driven by tourism demand, based on the analysis of potential tourism sales. This analysis assumes that a pro-active marketing strategy would be implemented to attract tourists to downtown Lewisburg and other locations in the county. There is the opportunity for entertainment and drinking establishments in the Lewisburg submarket that could be accommodated downtown as part of a strategy of attracting some of the 500,000 Distillery Trail tourists who travel each year to or from Jack Daniel's Distillery. Similarly, a diverse set of full-service restaurants would be supportable as part of this tourism destination-oriented strategy for capturing sales in Downtown Lewisburg. Other businesses that rely in part on a destination tourism marketing effort include gift/book and toy stores, shoe and accessory stores, and a specialty liquor store. Aside from these, there are additional businesses that help fill a gap in the existing supply, including specialty food stores, coffee shops, and home furnishings stores.

Chapel Hill Retail Potentials

The Chapel Hill submarket is growing rapidly, in terms of new household base and incomes, fueling rapid growth in demand for retail, restaurants, entertainment, and services. This submarket has market potential for another 220,000 to 260,000 square feet of retail and commercial space. Unlike Lewisburg, Chapel Hill is not as burdened by vacancy, so much of the growth in demand would be accommodated through new development.

Table 6. SUMMARY DESTINATION RETAIL POTENTIAL BY USE CHAPEL HILL, 2020-2025				
Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2020	2025		
Convenience	83,056	89,566	35,658	53,908
Shoppers Goods	194,987	210,704	69,282	141,422
Eating/Drinking	49,356	52,079	12,909	39,171
Limited Service	16,414	17,250	4,881	12,370
Full Service	22,965	24,056	8,028	16,028
Entertainment	17,216	17,976	-	17,976
Personal Services	22,247	24,028	7,811	16,217
TOTAL	366,861	394,354	125,660	268,694
Existing Vacant			5,713	
Net New Space				262,981
If HC in Lewisburg				226,730
Note:	Assumes Pro-active Internal/External Recruitment.			
Source:	Randall Gross / Development Economics.			

Shoppers' goods stores account for about one-half of the potential for retail space in Chapel Hill, followed by convenience stores and eating & drinking establishments. The Home Center demand could also be accommodated in Chapel Hill, although the area does not offer the traffic exposure of Lewisburg's Bypass. A detailed accounting of Chapel Hill's potentials by specific retail business category is found in Appendix Table 4.

Recommended Business Mix

There are a number of new retail business opportunities that will arise as the submarket grows over the next five to seven years. A viable business mix of about 118,000 square feet is recommended that accommodates demand within acceptable floor plate considerations for the various types of businesses. Perhaps most important and urgent of these would be a pharmacy, which will be necessary

to meet demand for convenience goods and services from a growing household base.

Table 7. RETAIL BUSINESS OPPORTUNITIES, CHAPEL HILL	
Type of Business	Square Feet
Pharmacy	12,500
Furniture/Home Furnishings	6,000
Apparel	6,600
Jewelry & Accessories	2,200
Restaurants	21,000
Family Entertainment	17,000
Personal Services	15,000
Auto Supply	5,600
Electronics	4,500
Gifts/Hobby/Toys/Books	7,000
Misc. SG-Pet Supplies	4,900
Hardware & Garden	7,000
Gas/Convenience	9,000
Total (Less Home Center)	118,300
Source: Randall Gross / Development Economics.	

Other business opportunities include restaurants, family entertainment venues, personal services, apparel & accessory stores, home furnishings, auto supply, toys, pet supplies, hardware and other convenience-oriented businesses. Some of the restaurant demand would be driven from visitors to Henry Horton State Park and sites along the Duck River, which flows through the northern part of the county near Chapel Hill.

Cornersville Retail Potentials

Cornersville is expected to capture modest retail growth over the next five to seven years, with potential for about 30,000 square feet. Potentials may be concentrated at Exit 27, including demand for restaurants and auto supply to serve the local and pass-through market. There would be warranted gross demand for about 54,000 square feet, but there is 27,000 square feet of vacant space in this submarket, yielding net demand for 27,700 square feet of new retail space. Cornersville potential is summarized below and detailed by specific type of retail establishment category in Appendix Table 5.

Table 8. SUMMARY DESTINATION RETAIL POTENTIAL BY USE CORNERSVILLE, 2020-2025				
Type of Good	Gross Demand (SF)		Existing	Warranted
	2020	2025	Uses	Demand
Convenience	46,086	48,334	34,447	13,887
Shoppers Goods	47,139	49,475	9,384	40,091
Eating/Drinking	14,494	15,159	8,254	6,905
Limited Service	7,336	7,676	5,035	2,641
Full Service	4,831	5,054	3,219	1,835
Entertainment	19,377	20,271	27,260	(6,989)
Personal Services	6,750	7,101	6,979	122
TOTAL	133,846	140,339	86,324	54,015
Existing Vacant			26,298	
Net New Space				27,717
If HC in Lewisburg				11,999
Note:	Assumes Pro-active Internal/External Recruitment.			
Source:	Randall Gross / Development Economics.			

Recommended Retail Mix

A recommended business mix of about 26,000 square feet is outlined below.

Table 9. RETAIL BUSINESS OPPORTUNITIES, CORNERSVILLE	
Type of Business	Square Feet
Grocer Sales to Convenience	10,000
Pharmacy/Health	6,300
Liquor/Miscellaneous	7,000
Hardware/Garden	4,500
Auto Supply	2,000
Misc. Shoppers Goods	1,000
Restaurants	3,500
Snack/Beverages	1,500
Total (Less Home Center)	25,800
Source: Randall Gross / Development Economics.	

There is demand for about 10,000 square feet of grocery space forecasted over the next five years in the Cornersville submarket, but it is assumed that this demand will be absorbed by existing convenience stores (through sales of some produce, milk and cheese products) rather than supporting new grocery store development. If not, then those sales will go to other existing groceries in the county and will eventually help support grocery development in Cornersville itself. As in Chapel Hill, there will be growing demand that could be captured for a pharmacy in Cornersville, along with liquor, hardware and auto supply stores.

Petersburg Retail Potentials

The market analysis determined that Petersburg has potential for capturing at least 30,000 square feet of retail demand, assuming that there is a pro-active tourism marketing and development effort to draw visitors to Petersburg and the area's heritage sites. This demand would support a full-service destination restaurant with live music entertainment. Also supported would be additional antiques, hobby/toy and game shops and gift-oriented businesses.

Table 10. SUMMARY DESTINATION RETAIL POTENTIAL BY USE PETERSBURG, 2020-2025				
Type of Good	Gross Demand (SF)		Existing	Warranted
	2020	2025	Uses	Demand
Convenience	19,166	19,783	7,705	12,078
Shoppers Goods	33,477	35,937	15,563	20,374
Eating/Drinking	24,566	27,154	-	27,154
Limited Service	9,631	9,876	-	9,876
Full Service	14,244	15,911	-	15,911
Entertainment	8,901	9,418	-	9,418
Personal Services	2,287	2,387	600	1,787
TOTAL	88,398	94,678	23,868	70,810
Existing Vacant			26,298	
Net New Space				44,512
If HC in Lewisburg				39,736
Note:	Assumes Pro-active Internal/External Recruitment.			
Source:	Randall Gross / Development Economics.			

Recommended Business Mix

Based on the findings of the market analysis, as noted above, a recommended business mix would include additional restaurants with live entertainment as a destination draw for tourism. There is also some ancillary

demand that could be captured in Petersburg for pharmacy, personal services, and other businesses in addition to the tourism-oriented businesses mentioned above.

Table 11. RETAIL BUSINESS OPPORTUNITIES, PETERSBURG	
Type of Business	Square Feet
Convenience Grocer/Pharmacy	4,000
Apparel	1,400
Antiques	5,000
Books/Music	1,100
Gifts/Souvenirs	1,000
Hobby/Toys/Games	1,200
Restaurants w/Live Music/Entertainment	14,000
Personal Services	1,800
Total (Less Home Center)	29,500
Source: Randall Gross / Development Economics.	

A common thread among the county's submarkets is the opportunity for tourism-oriented retail business development anchored by dining, distilleries, and entertainment. Another opportunity that appears to be common throughout the county is secured by demand for a pharmacy, which could be accommodated at several different locations in the northern, middle, and southern portions of the county.

Section 4. STRATEGIC RECOMMENDATIONS

This section provides strategic recommendations for land use, marketing, and development in Marshall County's corridors and within the "nexus" of these corridors in Downtown Lewisburg. The recommendations are disaggregated by submarkets, as defined previously in this report, with strategies also provided for selected corridors. Additional strategic recommendations are made for several "rural service nodes." Key opportunities have been identified from the market findings in Section 3 as a basis for these strategic recommendations.

Lewisburg Submarket

While there is an oversupply of retail space in the Lewisburg submarket, there is still demand for space that can be met there. A key focus would need to be on filling some of the existing vacant space before encouraging significant new commercial development. It is also important to strengthen the dining and entertainment destination appeal of Downtown Lewisburg, which can drive the market to fill vacant retail space in the area. There are also opportunities at Exit 32, which forms an extension of the City of Lewisburg and of the Lewisburg submarket. While much of the Lewisburg submarket is situated within the City of Lewisburg, all efforts to enhance retail opportunities in the area will benefit the County in terms of attracting sales inflow, sales tax revenue and other fiscal benefits.



Strengthen Downtown Destination Appeal

There are opportunities for retail and restaurant uses in the downtown area, but there is a need to recruit targeted independent businesses including up to 12,000 square feet of restaurant use, to the downtown area. There is significant leakage from Marshall County, in terms of dining and entertainment, to other areas in the I-65 Corridor. Downtown Lewisburg presents a good opportunity for concentrating full-service restaurants that would appeal to both the local market as well as tourists and other destination visitors.

The opportunities were also identified for specialty food, such as a bakery, along with home furnishings, shoes, accessories, personal services, and coffee shops in the downtown area. However, experience suggests that it would be challenging for many of these independent businesses to survive on their own without the broader anchor uses, such as restaurants and entertainment venues, to attract consumers back downtown. Thus, a priority would be to focus on those anchor uses that create destination appeal.



Recruit Home Center

There is growing demand in the county for a home center category retailer, such as a Lowe's or Home Depot store. While demand is insufficient to support such large stores at present, now is the time to start planning for the appropriate building or site that integrates the home center as an anchor for a broader retail mix. An existing vacant building might be targeted for reuse or redevelopment, or new construction encouraged when there is sufficient support in the market. Such stores help generate spin-off to other retailers because they draw from a broad trade area. Clearly there will be opportunities on The Bypass (especially for redevelopment of existing vacant space), but appropriate sites might also be located at I-65 Exit 32, which is closest to Lewisburg and to the county's I-65 Commerce Park.

Sites along I-65 can help the county draw more traffic and sales from outside of the county, thus generating more net fiscal benefits to the County. The Chapel Hill area, along Nashville Highway, may also be appropriate for home center stores because of residential development and retail demand growth in that submarket. However, that location is less likely to generate inflow to the county from other areas.

Strengthen Exit 32 as a Commercial Node

In addition to the opportunity of eventual development of a home center-anchored node at Exit 32, there is also the existing opportunity for restaurants. While demand for hotels was not tested through this market analysis, there may be opportunities for hotels at Exit 32 as well. Capturing hotel opportunities would help enhance the county's amenity base, generate support for restaurants, and strengthen the positioning of SR373 as the County's Economic Development Corridor, anchored by I-65 Commerce Park.

Chapel Hill Submarket

Chapel Hill is clearly the growth center of Marshall County, being situated within the commuter shed of Spring Hill, Cool Springs, and Nashville. As the area continues to see residential development, there will be increased demand for convenience retail that serves this growing household base. Strategies relate to ensuring appropriate sites for retail business development that capture demand and serve the local community but also minimize traffic congestion and negative impacts on the county as a whole.

Direct Retail Development to Avoid Congestion

There will be growing demand for neighborhood convenience retail, including pharmacies, personal services, hardware, auto supply, gas/convenience, and restaurants. There will also be some increased demand for family-oriented entertainment. Nashville Pike is clearly a prime location for these retail and service businesses targeted to serving the needs of a growing population in Chapel Hill. However, every effort should be made to reduce the traffic impacts and avoid problems with congestion that are likely to occur if retail businesses are concentrated in certain locations on Nashville Pike.



- **Consider Alternative Locations.** Retailers have located south of Chapel Hill in Wilhoite Mills no doubt to capture market support from the south and because of east-west access (on 270/99) to I-65 and Shelbyville. But as residential growth continues to the north and west of Chapel Hill, traffic will increasingly “funnel” into Nashville Pike and south through the congested downtown area to access retail businesses located on the south side. Alternative locations for new retail, such as on the north or west sides of Chapel Hill, might be encouraged as a way to serve those newly developing areas.
- **Consider Alternative Traffic Patterns.** Another approach might be to encourage development of alternative north-south routes that establish a “grid” transportation network. Such a network would help to distribute traffic more evenly and avoid bottlenecks. Even improvements to parallel roads within the downtown Chapel Hill area could help divert some traffic.

- **Reduce Curb Cuts.** Regardless of location, it will be important to focus development in an integrated approach rather than permitting multiple businesses to develop in a way that they have their own individual ingress and egress points along main highways.

Encourage Development of Recreation-Oriented Tourism

Henry Horton State Park is located just south of Chapel Hill and generates a significant share of the county's tourism base. The park is situated along the Duck River, which is fast becoming a recreation corridor as parks departments like Maury County enhance "blue way" recreation opportunities along the river and cities like Shelbyville look to improve their waterfronts as destination drivers. The market analysis identified business opportunities that are related to this recreation development, so long as there is a concerted effort to promote the county and the river for recreation-based tourism. Such retail opportunities include a restaurant with an outdoor setting, for example, as well as retailer of sporting goods apparel and equipment. Henry Horton and The Verona Caney Road area may both be appropriate for small-scale and environmentally sensitive commercial development such as around a trailhead associated with the Duck River.

Cornersville Submarket

Cornersville presents some opportunities for strengthening its historic core and also for visitor-related commercial development at Exit 27 (Lynnville Road). In particular, there is the opportunity identified for restaurant uses at the exit. Again, it is in the County's interest to encourage commercial development at certain points along I-65 because of the opportunities associated with generating sales inflow and fiscal revenues to the county. Allowing for development of a high-value chain with name recognition (such as a Cracker Barrel) at this site would help the County capture more through-traffic and sales.



Attention should be paid to gaining historic recognition for Cornersville's town center and for accessing grants or investment in rehabilitation and restoration of the town's historic buildings. There are opportunities in Cornersville and throughout the county for heritage tourism development, which support's the community's desire to retain a small town lifestyle. Heritage tourism, which has a more affluent market base, helps support local businesses by building the market base above a dependence on local households. The market base will support some additional retail and services in the downtown area, as outlined in the previous section of this report.

Fayetteville Highway Heritage Corridor

As noted above, there are opportunities for Marshall County to capture more of the heritage tourism market, which can not only help support existing businesses but also help the county capture more inflow sales and fiscal revenues generated by tourists and destination shoppers. In heritage tourism, it is important to establish visitor trails and corridors that link dispersed towns and historic sites together. There is already a Tennessee Whiskey Trail that accomplishes some of these objectives with a focus on the state's world-famous whiskey making sites and traditions. But there are opportunities for the county to build on its own strengths and promote heritage tourism along key corridors.

Fayetteville Highway is an excellent example of where such opportunities for heritage tourism can be captured through strategic promotion and development. This corridor is already used by tourists to access Jack Daniel's Distillery and the state's distillery route. Jack Daniel's attracts over 500,000 visitors in a normal year, so Marshall County has the opportunity to capture some of the spin-off from this existing visitor base. Fayetteville Highway includes important historic nodes for the county: Downtown Lewisburg, Belfast, and Petersburg.



- **Belfast.** Belfast has the depot, a small café, and an antiques business. This community provides opportunities for capturing additional tourism-related potential if (as in Cornersville), the County could help facilitate property owners' access to grants for historic preservation and restoration through historic designation (as possible, as through the National Register). At a minimum, the County can enhance the physical infrastructure around Belfast and promote the site through corridor branding and marketing.
- **Petersburg.** As noted previously, Petersburg has a wonderful town square with potential for some destination activity including restaurants, antiques, and live music. Petersburg could become a tourism destination and programmed into tour bus routes. It would be advisable for Marshall County to work with



Lincoln County and exposure opportunities for marketing this corridor in both counties. Lincoln County offers its heritage as the home of the “Lincoln County Process” for making whiskey, which has become the standard approved for Tennessee whiskey. Fayetteville and Lincoln County are starting to consider ways to enhance their whiskey trail heritage marketing, so this is an excellent time to consider “plugging” into those efforts for a bi-county Fayetteville Highway Heritage Corridor strategy.

Mooreville Highway Corridor: Economic Development Gateway

Marshall County has made investment in I-65 Commerce Park as an economic development employment node. As noted earlier, there are opportunities to enhance the Mooreville Highway corridor at Exit 32 by incorporating commercial activity in a well-planned “Gateway” node at that interchange. This gateway might include hotels and restaurants to help capture sales and fiscal revenues from I-65 inflow. A high-quality gateway might also help establish a brand for Marshall County and context for its economic development. The corridor itself might be branded as an economic development corridor to help encourage further development at I-65 Commerce Park and potential other sites along the corridor between the interstate and Lewisburg. The County might also consider renaming the highway “Lewisburg Highway” or “Marshall County Highway” in order to strengthen the brand.



Rural Service Nodes

Several rural service nodes were identified as part of the planning effort that may present opportunities for further development. These include Farmington (US31 / TN64) and Caney Creek (TN272 / 99).

Strengthen Farmington as a Service Node

Farmington’s location at the intersection of Nashville Pike (US31A), TN64 and CR271 helps to bring increasing traffic and exposure to this area. The node can be enhanced as a service and convenience node through signage and access to serve the surrounding farming community and pass-through traffic.

Create a Recreation-Oriented Visitor Node at Caney Creek

As noted earlier, the Caney Creek area is appropriate for recreation and convenience-oriented retail associated with Duck River recreational visitors and to serve the growing residential communities west of Chapel Hill. A recommended approach would be to pursue a blue way trailhead type of facility on the north side of the Duck River to serve as a hub for well-planned, small-scale retail. The

trailhead might be augmented by a convenience business alongside recreation apparel and equipment sales. It will also be important, as noted elsewhere, that the County pursue collaboration with neighboring counties in the Duck River watershed to protect the river and promote a regional recreational blue way corridor along the length of the Duck River.

APPENDIX

Table A-1. AT-PLACE EMPLOYMENT TRENDS BY INDUSTRY SECTOR, MARSHALL COUNTY, 2002-2018					
Sector	2002	2010	2018	2002-2018 Change Number	Change Percent
Ag/Mining	121	107	102	(19)	-15.7%
Utilities	118	116	105	(13)	-11.0%
Construction	312	234	331	19	6.1%
Manufacturing	5,831	2,253	3,577	(2,254)	-38.7%
Wholesale	135	164	257	122	90.4%
Retail	1,015	1,024	1,299	284	28.0%
Transport	149	115	146	(3)	-2.0%
Information	199	83	79	(120)	-60.3%
Finance	145	140	167	22	15.2%
Real Estate	86	51	67	(19)	-22.1%
Prof/Tech	110	110	140	30	27.3%
Management	1	10	10	9	900.0%
Administrative	615	796	375	(240)	-39.0%
Education	589	722	778	189	32.1%
Health Care	714	554	643	(71)	-9.9%
Arts/Entertainment	20	11	32	12	60.0%
Accom/FS	490	450	633	143	29.2%
Other Services	151	144	223	72	47.7%
Public Admin	365	236	530	165	45.2%
TOTAL	11,166	7,320	9,494	(1,672)	-15.0%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Table A-2. RETAIL SPACE INVENTORY, MARSHALL COUNTY CORRIDORS, 2020				
Category	Number	(Percent)	Sq. Ft.	(Percent)
<u>Convenience</u>				
Grocery	3	1%	102,500	7%
Convenience	11	4%	42,759	3%
Specialty Food	-	0%	-	0%
Health/Pers Care	4	1%	30,569	2%
Gas/Convenience	28	10%	94,662	7%
Florist	2	1%	3,837	0%
Liquor/Tobacco	10	4%	17,662	1%
Miscellaneous	3	1%	6,370	0%
Sub-Total	61	22%	298,359	22%
<u>Shoppers Goods</u>				
Apparel	9	3%	30,280	2%
Accessory	1	0%	1,760	0%
Jewelry	2	1%	6,704	0%
Shoes	1	0%	1,840	0%
Furniture	5	2%	44,436	3%
Home Furnishings	1	0%	1,782	0%
Appliances	-	0%	-	0%
Hardware/Paint	6	2%	48,636	4%
Garden Supply	1	0%	5,600	0%
Home Centers	1	0%	29,000	2%
Department Store	2	1%	179,037	13%
Non-DS GM	13	5%	125,618	9%
Used Mdse./Antiques	13	5%	78,783	6%
Vehicle Dealer	8	3%	51,745	4%
Auto Supply	9	3%	43,340	3%
Electronics	3	1%	5,804	0%
Books/Music	-	0%	-	0%
Musical Instruments	1	0%	462	0%
Gift, Novelty, Svr., Misc.	-	0%	-	0%
Hobby/Toy/Game	2	1%	3,412	0%
Luggage/Leather	-	0%	-	0%
Office Supply/Sta	-	0%	-	0%
Misc. Shoppers Goods	2	1%	5,468	0%
Sporting Goods	4	1%	12,270	1%
Sub-Total	84	31%	675,977	49%
<u>Dining & Entertainment</u>				
Restaurant-Limited	22	8%	49,774	4%
Restaurant-Full Service	20	7%	54,451	4%
Drinking Establish.	-	0%	-	0%
Snack/Beverage	1	0%	1,910	0%
Entertainment	8	3%	41,906	3%
Sub-Total	51	19%	148,040	11%
<u>Personal Services</u>	30	11%	52,835	4%
TOTAL	226	83%	1,175,211	86%
<i>Existing Vacant</i>	46	17%	192,964	14%
GRAND TOTAL	272	100%	1,368,175	100%
Sources:	Marshall County Assessor, brokers, businesses, and Randall Gross / Development Economics.			

Table A-3. TOTAL WARRANTED RETAIL DEMAND BY USE, LEWISBURG, 2020 AND 2025				
Type of Good	Gross Demand (Sq Ft)		Existing Uses	Warranted Demand
	2020	2025		
<u>Convenience</u>				
Grocery	69,535	74,131	77,500	(3,369)
Convenience	19,063	19,965	28,283	(8,318)
Specialty Food	5,494	5,783	-	5,783
Health/Pers Care	32,740	34,874	30,569	4,304
Gas/Convenience	36,706	38,985	49,195	(10,210)
Florist	2,743	2,908	2,199	709
Liquor/Smoke	17,168	18,286	13,177	5,109
Misc. Convenience	4,998	5,225	4,465	760
Sub-Total	188,446	200,156	205,388	(5,232)
<u>Shoppers Goods</u>				
Apparel	18,684	19,885	27,468	(7,583)
Accessory	1,124	1,183	-	1,183
Jewelry	4,001	4,241	6,704	(2,463)
Shoes	4,772	5,080	1,840	3,240
Furniture	23,200	24,790	44,436	(19,646)
Home Furnishings	7,702	8,227	1,782	6,445
Appliances	4,073	4,350	-	4,350
Hardware	45,301	48,328	34,136	14,192
Garden Supply	12,477	13,308	-	13,308
Home Supply	51,795	55,446	29,000	26,446
Department Store	100,586	107,447	179,037	(71,590)
Non-DS GM	64,347	68,638	59,954	8,684
Used Mdse.	45,288	47,512	65,766	(18,254)
Auto Dealer	56,357	60,227	51,361	8,866
Auto Supply	24,167	25,773	32,592	(6,819)
Electronics	9,425	10,066	5,804	4,262
Books/Music	4,274	4,477	-	4,477
Musical Instrument	1,456	1,553	462	1,091
Gift, Novelty, Souvenir	5,582	5,899	-	5,899
Hobby/Toy/Game	6,608	6,972	3,412	3,560
Luggage/Leather	999	1,050	-	1,050
Office Supply/Sta	2,093	2,236	-	2,236
Misc. SG	10,944	11,683	5,468	6,215
Sporting Goods	9,695	10,306	9,700	606
Sub-Total	514,950	548,674	558,922	(10,248)
<u>Dining & Entertainment</u>				
Restaurant-LS	50,047	52,368	39,858	12,509
Restaurant-FS	51,676	55,121	42,403	12,718
Drinking Est.	5,888	6,266	-	6,266
Snack/Bev	11,035	11,756	1,910	9,846
Entertainment	68,930	71,186	41,906	29,280
Sub-Total	187,576	196,697	126,078	70,620
<u>Personal Services</u>	48,526	51,650	37,445	14,205
TOTAL	939,499	997,178	927,833	69,345
<i>Existing Vacant</i>			192,964	
Net New Space				(123,619)
Source:	Randall Gross / Development Economics.			

Randall Gross / Development Economics

Table A-4. TOTAL WARRANTED RETAIL DEMAND BY USE, CHAPEL HILL, 2020 AND 2025				
Type of Good	Gross Demand (Sq Ft)		Existing	Warranted
	2020	2025	Uses	Demand
<u>Convenience</u>				
Grocery	24,222	26,182	25,000	1,182
Convenience	5,867	6,230	-	6,230
Specialty Food	2,430	2,597	-	2,597
Health/Pers Care	17,594	19,042	-	19,042
Gas/Convenience	16,620	17,961	4,535	13,426
Florist	1,684	1,823	1,638	185
Liquor/Smoke	9,910	10,780	4,485	6,295
Misc. Convenience	4,729	4,951	-	4,951
Sub-Total	83,056	89,566	35,658	53,908
<u>Shoppers Goods</u>				
Apparel	9,301	10,024	2,812	7,212
Accessory	484	517	-	517
Jewelry	1,703	1,831	-	1,831
Shoes	2,354	2,540	-	2,540
Furniture	7,864	8,497	-	8,497
Home Furnishings	5,211	5,625	-	5,625
Appliances	2,480	2,681	-	2,681
Hardware	17,570	19,123	14,500	4,623
Garden Supply	11,817	12,765	5,600	7,165
Home Supply	33,500	36,251	-	36,251
Department Store	8,941	9,508	-	9,508
Non-DS GM	34,670	37,869	29,398	8,471
Used Merchandise	9,006	9,425	5,104	4,321
Auto Dealer	14,666	15,787	-	15,787
Auto Supply	13,719	14,908	9,298	5,610
Electronics	4,659	5,039	-	5,039
Books/Music	1,835	1,950	-	1,950
Musical Instrument	710	767	-	767
Gift, Novelty, Souvenir	2,791	2,992	-	2,992
Hobby/Toy/Game	2,651	2,832	-	2,832
Luggage/Leather	406	433	-	433
Office Supply/Sta	919	1,000	-	1,000
Misc. SG	4,602	4,983	-	4,983
Sporting Goods	3,127	3,358	2,570	788
Sub-Total	194,987	210,704	69,282	141,422
<u>Dining & Entertainment</u>				
Restaurant-LS	16,414	17,250	4,881	12,370
Restaurant-FS	22,965	24,056	8,028	16,028
Drinking Est.	3,239	3,481	-	3,481
Snack/Bev	6,738	7,292	-	7,292
Entertainment	17,216	17,976	-	17,976
Sub-Total	66,572	70,056	12,909	57,147
<u>Personal Services</u>				
	22,247	24,028	7,811	16,217
TOTAL	366,861	394,354	125,660	268,694
<i>Existing Vacant</i>			5,713	
Net New Space				262,981
Source:	Randall Gross / Development Economics.			

Table A-5. TOTAL WARRANTED RETAIL DEMAND BY USE, CORNERSVILLE, 2020 AND 2025				
Type of Good	Gross Demand (Sq Ft)		Existing	Warranted
	2020	2025	Uses	Demand
<u>Convenience</u>				
Grocery	9,220	9,669	-	9,669
Convenience	2,384	2,498	13,776	(11,278)
Specialty Food	761	798	-	798
Health/Pers Care	6,063	6,358	-	6,358
Gas/Convenience	20,304	21,296	20,671	625
Florist	303	319	-	319
Liquor/Smoke	2,004	2,109	-	2,109
Misc. Convenience	5,047	5,287	-	5,287
Sub-Total	46,086	48,334	34,447	13,887
<u>Shoppers Goods</u>				
Apparel	902	949	-	949
Accessory	49	51	-	51
Jewelry	169	178	-	178
Shoes	254	267	-	267
Furniture	891	941	-	941
Home Furnishings	492	519	-	519
Appliances	296	312	-	312
Hardware	4,505	4,715	-	4,715
Garden Supply	1,748	1,841	-	1,841
Home Supply	14,933	15,718	-	15,718
Department Store	3,433	3,587	-	3,587
Non-DS GM	10,055	10,540	9,000	1,540
Used Mdse.	1,244	1,293	-	1,293
Auto Dealer	2,938	3,088	384	2,704
Auto Supply	2,069	2,165	-	2,165
Electronics	414	436	-	436
Books/Music	160	168	-	168
Musical Instrument	79	84	-	84
Gift, Novelty, Svr.	254	266	-	266
Hobby/Toy/Game	379	398	-	398
Luggage/Leather	36	38	-	38
Office Supply/Sta	195	204	-	204
Misc. SG	1,026	1,073	-	1,073
Sporting Goods	616	644	-	644
Sub-Total	47,139	49,475	9,384	40,091
<u>Dining & Entertainment</u>				
Restaurant-LS	7,336	7,676	5,035	2,641
Restaurant-FS	4,831	5,054	3,219	1,835
Drinking Est.	891	925	-	925
Snack/Bev	1,436	1,504	-	1,504
Entertainment	19,377	20,271	27,260	(6,989)
Sub-Total	33,871	35,430	35,514	(84)
<u>Personal Services</u>	6,750	7,101	6,979	122
TOTAL	133,846	140,339	86,324	54,015
<i>Existing Vacant</i>			26,298	
Net New Space				27,717
Source:	Randall Gross / Development Economics.			

Table A-6. TOTAL WARRANTED RETAIL DEMAND BY USE, PETERSBURG, 2020 AND 2025				
Type of Good	Gross Demand (Sq Ft) 2020	2025	Existing Uses	Warranted Demand
<u>Convenience</u>				
Grocery	3,816	3,941	-	3,941
Convenience	3,844	3,926	1,900	2,026
Specialty Food	1,008	1,031	-	1,031
Health/Pers Care	1,879	1,939	-	1,939
Gas/Convenience	2,957	3,037	3,900	(863)
Florist	235	241	-	241
Liquor/Smoke	625	642	-	642
Misc. Convenience	4,802	5,025	1,905	3,120
Sub-Total	19,166	19,783	7,705	12,078
<u>Shoppers Goods</u>				
Apparel	1,161	1,367	-	1,367
Accessory	1,316	1,836	1,760	76
Jewelry	413	454	-	454
Shoes	246	264	-	264
Furniture	247	258	-	258
Home Furnishings	129	165	-	165
Appliances	70	73	-	73
Hardware	754	784	-	784
Garden Supply	378	428	-	428
Home Supply	4,520	4,776	-	4,776
Department Store	4,273	4,379	-	4,379
Non-DS GM	4,714	4,926	8,890	(3,964)
Used Merchandise	9,889	10,166	4,913	5,253
Auto Dealer	593	624	-	624
Auto Supply	425	443	-	443
Electronics	156	162	-	162
Books/Music	962	1,101	-	1,101
Musical Instrument	33	52	-	52
Gift, Novelty, Souvenir	833	1,093	-	1,093
Hobby/Toy/Game	1,006	1,166	-	1,166
Luggage/Leather	193	200	-	200
Office Supply/Sta	61	63	-	63
Misc. SG	255	287	-	287
Sporting Goods	850	870	-	870
Sub-Total	33,477	35,937	15,563	20,374
<u>Dining & Entertainment</u>				
Restaurant-LS	9,631	9,876	-	9,876
Restaurant-FS	14,244	15,911	-	15,911
Drinking Est.	267	444	-	444
Snack/Bev	425	923	-	923
Entertainment	8,901	9,418	-	9,418
Sub-Total	33,467	36,572	-	36,572
<u>Personal Services</u>	2,287	2,387	600	1,787
TOTAL	88,398	94,678	23,868	70,810
<i>Existing Vacant Net New Space</i>			26,298	44,512
Source:	Randall Gross / Development Economics.			

November 27, 2020

Marshall County Corridor Workshop Summary

Workshop Dates: 11/10/20 (2) and 11/12/20 (2)

Participants: 38 (participant list is available)

Exercise 1a: Where do you live?

- 44% identified as being in the County and not within a particular municipality
- 24% live in Chapel Hill
- 15% live in Lewisburg
- 6% live in Cornersville
- 3% live in Petersburg
- 9% live outside the County (most of these were students—interestingly)

Exercise 1b: Where do you learn (students)?

- 41% attend Forrest HS in Chapel Hill
- 29% attend Marshall County HS in Lewisburg
- 24% attend Cornersville HS
- 6% attend elsewhere

Exercise 1c: Where do you work?

- 46% work in Lewisburg
- 25% are retired
- 13% work in Chapel Hill
- 8% work outside the County
- 4% work in Belfast
- 4% work in the County

Exercise 1d: Where do you have fun?

- 34% identified areas in the County (not a specific municipality)
- 30% identified areas in Lewisburg
- 16% identified areas outside of the County
- 13% identified areas in Chapel Hill
- 5% identified areas in Cornersville
- 1% identified areas in Mooresville
- Less than 1% identified areas in Petersburg

Exercise 2a: What do you love about Marshall County? Top 3 answers:

- 32% People/community
- 21% Small town feel
- 18% Rural/natural beauty

Exercise 2b: What would you like to see change in the future? Top 4 answers:

- 23% More/different restaurants
- 14% More retail businesses



- 9% More entertainment
- 7% Better property maintenance/growth management (tie)
- 7% More activities for youth (tie)

Exercise 2c: List what you like about existing development along Marshall County's corridors. Top 4 answers:

- 24% Scenic quality
- 13% Development appearance
- 9% Light development
- 7% Historic character (tie)
- 7% Ease of navigation (tie)
- 7% Road improvements (tie)
- 7% Signage (tie)

Exercise 2d: List what you do NOT like about existing development along Marshall County's corridors. Top 4 answers:

- 16% Some development not attractive
- 11% Road congestion
- 8% Lack of retail/sit-down restaurants (tie)
- 8% Too much development (tie)
- 8% Location of development (tie)—out of place
- 6% Lack of landscaping

Exercise 3: Marshall County's key civic, recreational, and historic assets

- Henry Horton (16% of the total answers/100% of the participants)
- Lewisburg square-Downtown (9% of the total answers/57% of participants)
- Chapel Hill (7% of the total answers/43% of participants)
- Petersburg (6% of the total answers/40% of participants)
- Cornersville (5% of the total answers/31% of participants)
- Forrest Boyhood Home (5% of total answers/31% of participants)
- Lewisburg-general
- County-general
- Belfast
- Delina Store
- Lewisburg Rec Center
- Strategic Edge Gun Range
- Saddle Creek Golf Course/Tap Root Restaurant
- Half Ass Acres or Park on Depot?
- Sonic
- Ronnie Bowers Wetland Trail
- Duck Canoe
- New Lake
- Wooley's Off Road
- Kid's Club
- Farmington
- Exit 22



- Dairy Research and Education
- Nash Creamery
- Willhoite Mill
- Chapel Hill Light?
- Spence Cabin
- Bethbirei Church
- Rock Museum?
- Delina Singing
- Caney Spring Store
- Lewisburg Armory
- Wyatt Archaeological Museum
- Buford Ellington Home
- Berlin Store/Berlin Springs
- Hwy 50 Drive-in
- Lillard's Mill Boat Launch/Milltown Dam
- Chapel Hill Community Center
- Tennessean Truck Stop
- Farmington Confederate Monument
- Beechwood Cemetery
- Forrest Monument
- Chapel Hill Tractor Pull
- Petersburg Tractor Pull
- Marshall County Library
- Red Cedar Farm
- Lions Club Belfast
- Lions Club Petersburg
- Rock Creek Park/Greenway
- Airport
- Duck River
- Tennessee Walking Horse HQ
- Columbia State
- Cashion Sports Fields

Exercise 4: Identify which "centers" should expand, contract, or stay the same. For centers you believe should be expanded, describe the appropriate development character (urban, rural, etc.).

- These centers should expand:
 - Lewisburg
 - Chapel Hill
 - Caney Spring (housing—suburban, rural)
 - 99/270/31 (retail—urban, suburban)
 - Berlin (housing, larger civic space—rural)
 - Farmington (housing, retail—urban, suburban)
 - Exit 32 (retail, restaurants—suburban, rural)



- Exit 22 (retail, restaurants—urban, suburban)
 - Belfast (retail—urban, suburban, rural)
- These centers should stay as they are:
 - Cornersville
 - Petersburg
 - Holts Corner
 - Verona
 - Laws Hill
 - Mooresville
 - Delina

Exercise 5: With the existing zoning in mind, identify areas along the major corridors where land uses should be expanded, if any. For these areas, note what uses are appropriate and why.

- Chapel Hill: retail, restaurants (no consensus)
- Cornersville: retail, restaurants, housing (no consensus)
- 99/270/31: retail
- Berlin: retail, restaurants, housing (good consensus among those who responded)
- Verona: retail, restaurants (no consensus)
- Farmington: retail, restaurants, housing (some consensus)
- Mooresville: retail (no consensus)
- Exit 32: retail, restaurants (good consensus)
- Exit 22: retail, restaurants (good consensus)
- Belfast: retail, restaurants, housing (good consensus)
- Notes on this exercise:
 - Exercise with the least amount of responses
 - Some participants did not clarify their marks
 - Some participants repeated Exercise 4
 - Exercises 4 and 5 could have been a single exercise with 3 objectives:
 - Which centers/downtowns should expand?
 - What should the character be (urban, suburban, rural)?
 - What uses would you like to see in these areas?

Exercise 6: What should be the County's top priority with regard to development appearance along its major roads?

Exercise 6a: Expanded standards for maintaining the appearance of current and future development?

- Extremely Important: 40%
- Very Important: 31%
- Moderately Important: 17%
- Slightly Important: 9%
- Not Important at All: 3%

Exercise 6b: Revisit requirements for the placement and orientation of buildings based on character of the area (urban, suburban, rural)?

- Extremely Important: 14%
- Very Important: 43%
- Moderately Important: 26%
- Slightly Important: 14%
- Not Important at All: 3%

Exercise 6c: Additional guidance on landscape buffers along corridors including separation distance between developments and roadways?

- Extremely Important: 26%
- Very Important: 37%
- Moderately Important: 34%
- Slightly Important: 3%
- Not Important at All: 0%

Exercise 6d: Expanded standards for the design of buildings such as materials, amount of openings, roofs, etc.?

- Extremely Important: 14%
- Very Important: 40%
- Moderately Important: 31%
- Slightly Important: 9%
- Not Important at All: 6%

Exercise 6e: Expanded standards for landscaping for development on commercial or industrial zoned lots?

- Extremely Important: 29%
- Very Important: 31%
- Moderately Important: 20%
- Slightly Important: 14%
- Not Important at All: 6%

Are there other priorities that are not listed above?

- There should be a balance between appearance and landscaping and pedestrian services
- People friendly
- Attract people
- Great jobs
- Maintain property
- Places to eat different
- Wider roads
- Baker
- Butcher shops
- More fire stations
- Also or Aldi stores (?)
- Keep farms with animals (cows, horses, goats, etc.)
- Dark Sky/Downward facing lighting to preserve what is left of night
- Space for pedestrian/bike access

- Limiting poultry farming along corridors, which is a sensory nightmare
- All corridors should not be junky, but inviting!

End of Summary