

# An Economic Assessment of Maury County, Tennessee\* Findings & Challenges

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## Executive Summary

Situated in southern Middle Tennessee, Maury County is experiencing significant economic and demographic change. Maury County employers, particularly General Motors, attract commuting workers from all over the Nashville area. The county has significant natural resources, including the scenic Duck River, and a growing number of young workers.

### Demographics and population

- *Population is growing quickly in Maury County, faster than the Nashville metropolitan area and surrounding rural counties.*

The number of young persons 20-39 years is growing much faster than in the Nashville area, offering an important growing source of labor. This is an important advantage for Maury County. Rapid population growth has not boosted school enrollments as in the large suburban counties. This trend is unusual and requires more investigation.

- *Maury County's population center of gravity is shifting towards Spring Hill and unincorporated areas.*

This shift of the population creates new demand for public services in the growing areas, especially for schools, roads, and law enforcement.

- *Maury County's retirement age and near-retirement age population is proportionally larger than the Nashville metropolitan area, but smaller than surrounding rural counties.*

Due to shifting household spending patterns, local tax revenue growth may slow as the population becomes older.

### Jobs and income

- *Saturn/GM dominates job and income for Maury County. Future employment and income stability requires diversification away from the auto sector.*
- *Holding the effects of the Saturn/GM plant constant, employment is growing moderately.*

Adjusting for Saturn/GM downsizing, payroll employment in Maury County rose nearly 1,600 from 2001 to 2006. Columbia and Spring Hill produced roughly equal job increases, while the remainder of the county lost jobs. Manufacturing experienced the biggest losses (again excluding Saturn/GM), while health care, trade, and tourism showed gains.

- *Commuting is very important for Maury County.*

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Thousands of workers travel to and from the county each day. Permanently higher gasoline prices will cause workers to search for homes closer to where they work. This could be an important opportunity for Maury County to capture more of the inbound commuters.

- *Income leakage attributable to commuting is very large.*

Millions of payroll dollars generated in Maury County is received by workers who live and spend in other counties. Reducing the income leakage will help support local businesses and increase local tax revenue.

- *Growth of inflation-adjusted average pay lags behind both the Nashville MSA and neighboring rural counties.*

Growth of average pay is barely keeping pace with inflation and lags behind competing counties. Improving the standard of living over time will require faster growth of average real pay.

- *The job growth engine for the county is shifting to the Spring Hill area.*

Gains in good-paying jobs in Spring Hill are roughly balancing losses of good-paying jobs in the rural portions of the county.

- *Estimated underemployment is high in Maury County.*

A significant number of workers are not fully utilizing their skills and experience.

- *Maury County shows a competitive advantage in transportation and warehousing, information, finance, health care, and travel-related businesses.*

Traditional manufacturing jobs are on the decline, replaced by jobs in health care, travel, trade, and transportation.

## **Education**

- *Maury County is at a relative disadvantage in terms of educational attainment.*

The proportion of adults with a Bachelor's degree is significantly lower than the state and the Nashville MSA, placing the county at a competitive disadvantage for retaining and attracting value-added employers. Educational attainment is closely linked to productivity and better-paying jobs.

- *Public school enrollment has been flat, especially when compared with competing counties.*

Rapid population growth has not resulted in rapid growth of the school-age population. This could change if younger workers (20-39 years) choose to raise families in Maury County.

- *Scores by Maury County students are above benchmark standards, but K-8 math and reading scores and high school graduation rates nevertheless rank behind those of competing counties.*

Maury County ranks well in terms of value-added by schools, but performance is generally lower than for competing areas. Maury County is facing challenges in its educational system. Knowledge-based employers desire workers with excellent communication and reasoning skills and will locate in areas where these skills are available.

- *Employers report difficulty finding skilled workers who are able to adapt to new technologies.*

As part of a separate study, we found that Maury County employers are concerned about the availability of workers who can adapt to changing technology. The lack of a local technology center was also mentioned as a concern.

### **Forecast and outlook**

- *Our forecast for Maury County shows slower growth of population, jobs, and income during the next ten years. Per capita income shows little change.*

Growing the number of good-paying jobs is paramount to achieve growth of per capita income. In a competitive environment, Maury County must determine how to offer employers and households a mix of quality of life and quality workforce that is not available elsewhere.

- *Green power is an opportunity for Maury County.*

Combine Maury County's natural assets and growing population of young people with the trend of higher gasoline prices for commuters, and you have an important opportunity to take advantage of the green movement. In a competitive environment, Maury County must determine how to offer employers and households a mix of quality of life and quality workforce that is not available elsewhere.