

2019-2020 Reference Guide

TENNESSEE'S ECONOMY



TN Department of
**Labor & Workforce
Development**

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and Reporting Engine Division



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Executive Summary

Tennessee's economy experienced an historic increase in unemployment from 109,312 in March 2020 to 482,906 and an unemployment rate of 15 percent in April as the response to the coronavirus pandemic caused business closures throughout the state. By June 2020, the unemployment rate had dropped to 10.1 percent; however, 324,508 individuals were still unemployed. Due to the unprecedented challenges to the workforce system this is creating, this year's Tennessee's Economy report contains real-time data on the effects of the pandemic through June 2020, as well as analyzing economic trends through 2019.

The Tennessee Economy in 2019 Nonfarm employment in Tennessee increased by nearly two percent from 2018 to 2019 to 3,063,300, creating 58,800 jobs over the year (see Summary, p. 3). Metropolitan growth was strongest in the Nashville MSA, which grew by 3.3 percent, twice as fast as Tennessee's other metropolitan areas. Employment increased in 61 of 95 counties, as the number of establishments grew by 3.2 percent and nominal total payroll increased by 4.4 percent to 156.8 billion dollars. The average annual median wage (not adjusted for inflation) also increased by nearly three percent to \$35,909, 0.9 percent of the U.S. average of \$39,810, and average hourly wages for production workers increased to \$19.76.

The unemployment rate for 2019 was 3.4 percent, lower than the U.S. rate of 3.7 percent, and the labor force had increased by nearly three percent. The state job bank, jobs4t.gov, listed an average of one job for each unemployed person. Although unemployment rate for veterans was below the state average, rates for youth, those with disabilities, and in poverty were still in the double digits. Due primarily to demographic changes, as the workforce ages, the projected growth rate for all occupations through 2028 was 0.7 percent annually compared to previous projections of 1.2 percent through 2026.

Short Term Trends Tennessee's economy experienced significant changes in employment and unemployment during the period March 2020 to June 2020 due to the coronavirus pandemic and subsequent contraction.

From May 2019 to May 2020, more than 250,000 jobs were lost, although May employment rebounded by nearly 97,000 jobs from April 2020. Over the year, nearly four times as many jobs were lost in service-providing industries (208,800) as in the goods producing sector (48,400). Nearly all jobs lost in the goods producing sector were in transportation equipment manufacturing and its related industries plastics and rubber manufacturing.

The largest losses in the service-providing sector were in leisure and hospitality, comprising nearly one out of every two jobs lost. Other large job losses occurred in administrative support and waste management services, education and health services, retail trade, and local government, in both the education and general government sectors. Both school closings and budget shortfalls affected local government employment.

Other industries increased in employment over the year from May 2019 to May 2020 in both the goods producing and services-providing industries. These essential industries, needed for survival while individuals sheltered at home or began working from home and students were no longer in school, included food and beverage stores and other stores which sell food.

Transportation and warehousing increased as more goods were ordered from home rather than purchased in stores, intensifying e-commerce and its supporting industries. Computer manufacturing employment growth was supported by the need for technology for increased online presence in education, work, and leisure environments. Construction of buildings continued its growth as projects in the pipeline were being completed, buoying some durable goods manufacturing industries.

According to current research, several trends are likely. If work at home increases, with the potential for new jobs closer to where people live, there may be more job growth outside of metropolitan areas. This could cause negative effects on business support services such as restaurants, hotels, cleaning, and maintenance services, hurting lower-wage workers. Lower-wage workers could also lose employment if more routine, lower-skilled jobs are displaced with the faster adoption of technology. But lack of funds for investment could slow this trend.

A third potential trend could be re-shoring of manufacturing. Manufacturing Industries identified as more likely to re-shore include several which are prominent in Tennessee, including transportation equipment manufacturing and related industries, chemicals, and medical equipment and supplies.

Statewide Employment Tennessee's average annual nonfarm employment increased 1.9 percent from 2018 to 2019, adding 58,800 jobs. Goods producing jobs grew at a rate of 2.1 percent compared to 2.2 percent for private service-providing jobs. Jobs in the government sector grew by 0.3 percent. In the goods producing sector, mining, logging, and construction grew by 5,400 jobs while manufacturing increased by 4,600 jobs.

Labor Force and Demographics The annual average unemployment rate for the U.S. in 2010 was 9.6 percent and dropped to 3.7 percent in 2019, a decrease of 5.9 percent. Tennessee's annual average in 2010 was 9.7 percent and declined to 3.4 percent in 2019, a decrease of 6.3 percent, which was more significant than the United States. Tennessee's June 2020 seasonally adjusted unemployment rate was 9.6 percent, a decrease from the revised May 2020 rate of 11.0 percent.

Tennessee Wages and Income 2019 Among the 22 major occupational groups, median wages increased for 19 of the groups. The highest percentage changes were for personal care and service occupations (7.38 percent), office and administrative support occupations (6.11 percent), and for sales and related occupations (3.65 percent).







Tennessee Safety 2018 The total recordable incidence rate for all industries in Tennessee per 100 full-time equivalent workers during 2018 was estimated to be 3.0. The total recordable rate for private industry was 2.8 and the total recordable rate for public sector industries was 4.0.

Tennessee Long Term Outlook to 2028 From a base of 3.3 million jobs in 2018, total employment for Tennessee, including agricultural, self-employed, and private household workers, is expected to grow to 3.5 million by 2028. With employment expected to increase by 0.7 percent annually, continued expansion in nine of twelve major industry sectors is projected.

Detailed Regional Analysis Summaries of key labor force and economic trends for the West, Middle, and East Regions are included in this section. Key labor force data presented for each region includes population, labor force participation rates, educational attainment by race/ethnicity, the labor force status of youth and those with disabilities, poverty and unemployment rates, and numbers of those with significant barriers to employment. Also displayed are regional employment growth from 2018 to 2019, the distribution of occupational employment, and industries and occupations expected to increase employment based on long term projections through 2026.

Workforce Strategies Six areas of skill development- social engagement, earnings and income, avoiding crime and delinquency, physical and mental health, reflective decision making, and educational attainment- and workforce strategies which encompass these across the regions are listed. Included are data on apprenticeship completers in 2019 and licensed occupations.

Tennessee's Economy | 2019

 Employment	Total Nonfarm Employment 2019: 3,122,100 1.9% 2018: 3,063,300 Stronger	New Jobs 2019: 58,800 2018: 50,900 Stronger	MSA Employment 2018-2019 Nashville - 3.27% Jackson - 1.02% Chattanooga - 1.64% Knoxville - 1.38% Stronger
 Employers	Average Number of Establishments 2019: 166,863 3.2% 2018: 161,696 Stronger	Total Payroll 2019: \$156.8 Billion 4.39% 2018: \$150.2 Billion Stronger	Counties That Increased Employment 2019: 61 2018: 64 Challenge
 Wages & Income	Average Annual Wage 2019: \$51,687 2.5% 2018: \$50,450 Stronger	State Median Wage 2019: \$35,909 2.9% 2018: \$34,890 Stronger	Average Hourly Wages - Production Workers 2019: \$19.76 2018: \$19.51 Stronger
 Labor Force & Demographics	Unemployment Rate 2019: 3.4% -0.1% 2018: 3.5% Stronger	Labor Force 2019: 3,344,849 2.8% 2018: 3,254,261 Stronger	Unemployment Rates Veterans, 2019: 2.6% Youth 2018: 12.8% With Disability, 2018: 11.3% % In Poverty, 2018: 16.1% Stronger
 Job Outlook	Ratio of Unemployed to Job Openings June 2019: 0.72 -0.06% June 2018: 0.78 Stronger	Projected Annual Growth Rate, All Occupations 2018-2028: 0.70% 2016-2026: 1.18% Challenge	Projected Job Openings 2018-2028: 4,148,740 Stronger
 Safety on the Job	Total Nonfatal Occupational Illnesses and Injuries, All 2018: 3.0 per 100 FTE 2017: 3.0 per 100 FTE Strong	Total Nonfatal Occupational Illnesses and Injuries, Public Sector 2018: 4.0 per 100 FTE 2017: 3.7 per 100 FTE Challenge	Fatal Occupational Injuries 2018: 122 2017: 128 Stronger

Short Term Trends in the Tennessee Economy: March 2020 to June 2020

Tennessee's economy has experienced significant changes in employment and unemployment during the period March 2020 to June 2020. The National Bureau of Economic Research (NBER) declared the United States began a recession in February 2020 due to the coronavirus pandemic and the subsequent economic contraction. Tennessee's unemployment rate increased from 3.2 percent in March, 2020 with 109,312 people unemployed to 15 percent in April with 482,906 unemployed. By June the unemployment rate had dropped to 10.1 percent; however 324,508 individuals were still unemployed.

The Tennessee industries losing the most employment from May 2019 to May 2020 are shown in Table 1 below. From May 2019 to May 2020, more than 250,000 jobs were lost in Tennessee, although May employment rebounded by nearly 97,000 jobs from April 2020. Over the year, nearly four times as many jobs were lost in service-providing industries (208,800) than in the goods producing sector (48,400). Nearly all jobs lost in the goods producing sector were in transportation equipment manufacturing and its related industries plastics and rubber manufacturing.

The largest losses in the service-providing sector were in leisure and hospitality, comprising nearly one out of every two jobs lost. As measures to fight the spread of the pandemic were put in place, hotels and other accommodations lost more than 19,000 jobs and food services and drinking places 67,300, although a significant recovery of those food service jobs occurred from April to May. Other large job losses occurred in administrative support and waste management services (32,800), education and health services (both in ambulatory care settings and hospitals), retail trade (12,000), and local government, in both the education and general government sectors. Both school closings and budget shortfalls affected local government employment.

Table 1: TN Industries Losing the Most Employment May 2019-May 2020

Industry Title	May 2020	April 2020	May 2019	May 2020 - April 2020 Empl. Chg.	May 2020 - May 2019 Empl. Chg.
Total Nonfarm	2,855,400	2,758,700	3,112,600	96,700	-257,200
Goods Producing	439,500	417,000	487,900	22,500	-48,400
Manufacturing	309,400	288,500	356,500	20,900	-47,100
Transportation Equipment Manufacturing	40,800	31,400	75,300	9,400	-34,500
Plastics and Rubber Products Manufacturing	19,400	18,200	25,100	1,200	-5,700
Service-Providing	2,415,900	2,341,700	2,624,700	74,200	-208,800
Wholesale Trade	115,100	116,100	120,600	-1,000	-5,500
Retail Trade	321,600	312,200	339,700	9,400	-18,100
Motor Vehicle and Parts Dealers	43,900	45,000	47,300	-1,100	-3,400
Clothing and Clothing Accessories Store	10,600	9,700	22,600	900	-12,000
Professional and Business Services	384,900	381,800	417,600	3,100	-32,700
Administrative and Support and Waste Management	192,000	188,300	224,800	3,700	-32,800
Educational and Health Services	417,300	411,300	435,100	6,000	-17,800
Ambulatory Health Care Services	145,300	137,700	152,300	7,600	-7,000
Hospitals	106,600	106,700	110,700	-100	-4,100
Leisure and Hospitality	256,500	197,100	359,400	59,400	-102,900
Accommodation	21,700	22,700	40,800	-1,000	-19,100
Food Services and Drinking Places	207,700	154,000	275,000	53,700	-67,300
Government	423,700	435,000	444,800	11,300	-21,100
Local Government Educational Services	138,800	143,300	148,800	-4,500	-10,000
Local Government, Excluding Education	142,900	142,900	148,200	0	-5,300

Source: TN Dept of Labor and Workforce Development, WIR²ED Division, Current Employment Statistics May 2020 Seasonally Adjusted Data, Current Employment Statistics May 2020 Seasonally Adjusted Data, Preliminary.

Unemployment Claims by Occupation: Data on unemployment claims for the week ending June 27, 2020 showed the jobs of those most affected by the pandemic. Table 2 below lists the 20 occupations for which individuals filed the most claims. Closing of food services and drinking places caused large numbers of claims for waiters and waitresses, cooks, bartenders, and food preparation and serving workers, with waiters and waitresses filing the most claims of any occupation. Claims in accommodation were filed by maids and housekeeping cleaners and janitors. Retail salespersons, cashiers, and stock clerks were laid off in retail trade. Production workers and inspectors lost jobs in manufacturing. As schools closed and parents were home with children, child care workers lost jobs. Seven out of 10 jobs required only short term (less than 30 days training). With the highest number of claims being filed by those holding low-skilled jobs, placement in other job opportunities would not happen quickly.

**Table 2: Highest Number of Claims Filed by Occupation, Week Including June 27, 2020
(Estimated 2020 Employment > 100)**

SOC Code	Occupation Title	2020 Employment	Level Education	Training Needed	Total Claims
35-3031	Waiters and Waitresses	56,630	None	ST OJT	13,659
41-2031	Retail Salespersons	88,580	None	ST OJT	8,617
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	99,080	None	ST OJT	8,331
41-2011	Cashiers	76,660	None	ST OJT	8,293
43-4051	Customer Service Representatives	65,420	HS	ST OJT	6,056
51-9199	Production Workers, All Other	14,080	HS	MT OJT	5,351
35-2014	Cooks, Restaurant	24,340	None	MT OJT	5,256
37-2012	Maids and Housekeeping Cleaners	26,820	None	ST OJT	5,069
53-3031	Driver/Sales Workers	8,810	HS	ST OJT	4,931
35-3011	Bartenders	7,7740	None	ST OJT	4,679
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	45,400	None	ST OJT	3,720
39-9011	Childcare Workers	19,780	HS	ST OJT	3,714
39-5012	Hairdressers, Hairstylists, and Cosmetologists	12,900	PS	None	3,607
43-5081	Stock Clerks and Order Fillers	58,420	HS	ST OJT	3,483
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	76,710	None	ST OJT	3,320
53-7064	Packers and Packagers, Hand	18,520	None	ST OJT	3,301
11-9199	Managers, All Other	34,670	BA	None	3,233
53-3032	Heavy and Tractor-Trailer Truck Drivers	72,800	PS	ST OJT	2,929
25-9041	Teacher Assistants	24,240	SC	None	2,806
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	14,650	HS	MT OJT	2,659

Legend Entry Level Education:

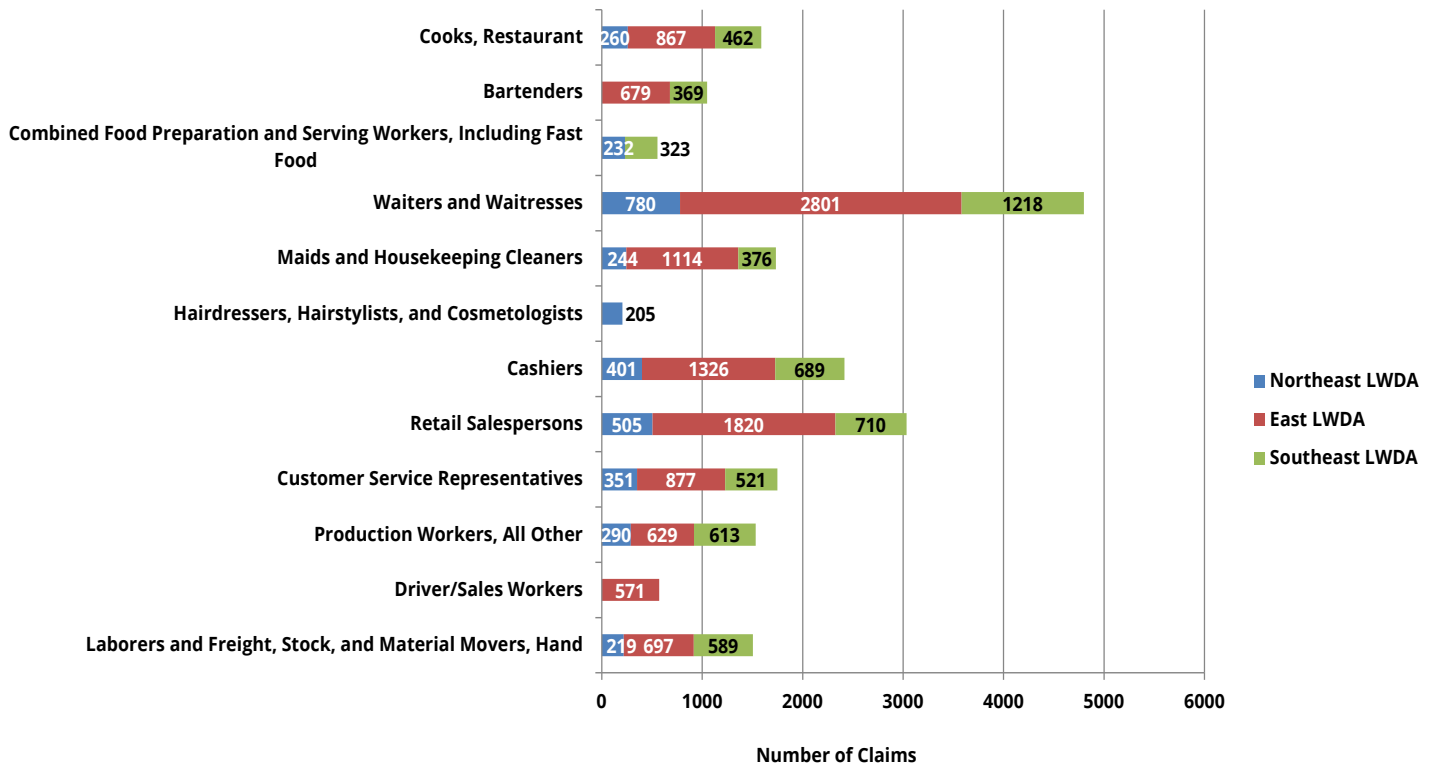
None=No formal education; HS=High School; PS=Postsecondary non-degree award; SC=Some college; BA=Bachelor's degree

Job Training Needed: None=None; ST OJT=Short-term on-the-job; MT OJT=Moderate term on-the-job

Total Claims=Total initial and continued claims on June 27, 2020

Source: TN Dept of Labor and Workforce Development, WIRED Division, PROMIS Data, 6-27-2020 and TN Short Term Projections, 2019-2021

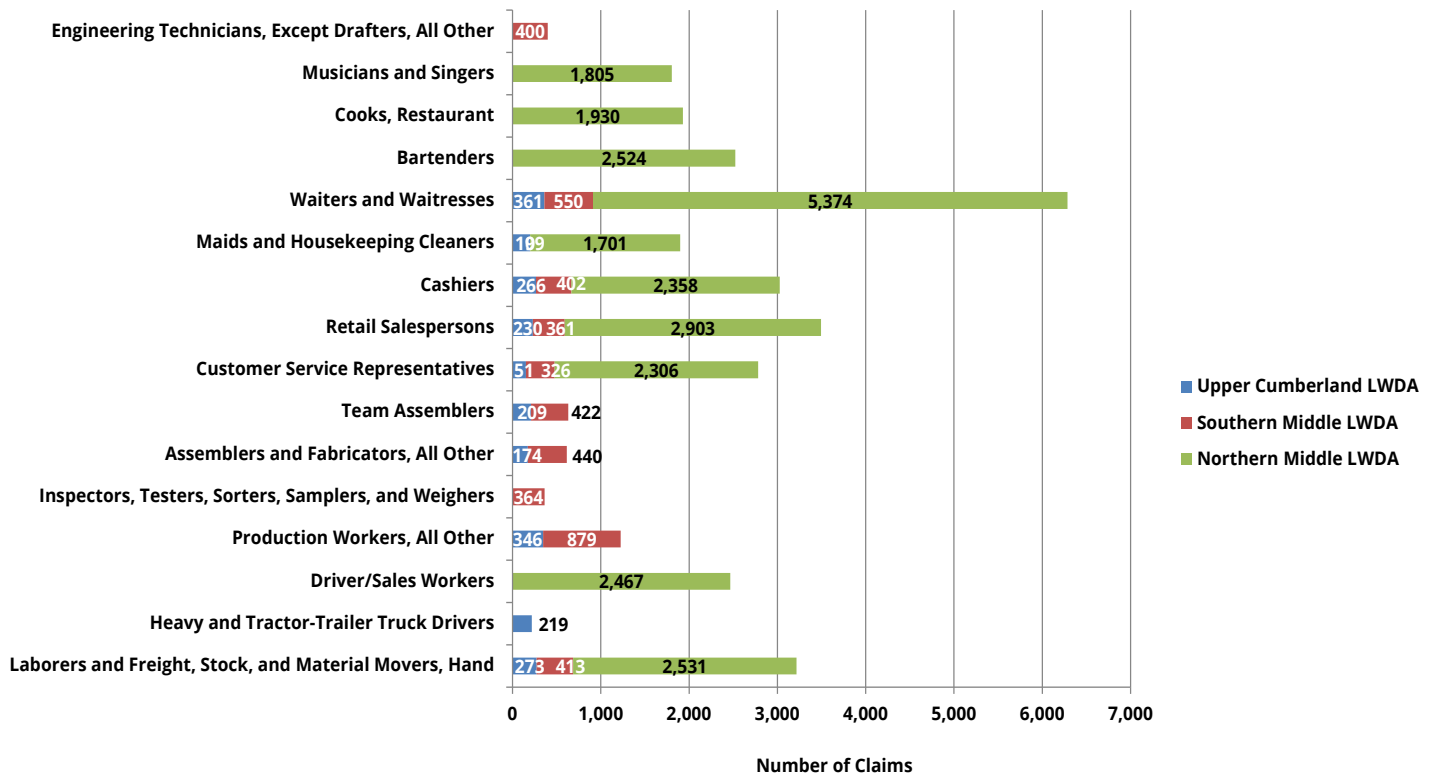
East Region Top Number of Claims by LWDA and Occupation



Includes the top ten occupations by number of initial and continued claims by LWDA.
 Source: TN Dept of Labor and Workforce Development WIR²ED Division PROMIS data, week ending June 27, 2020

Figure 1

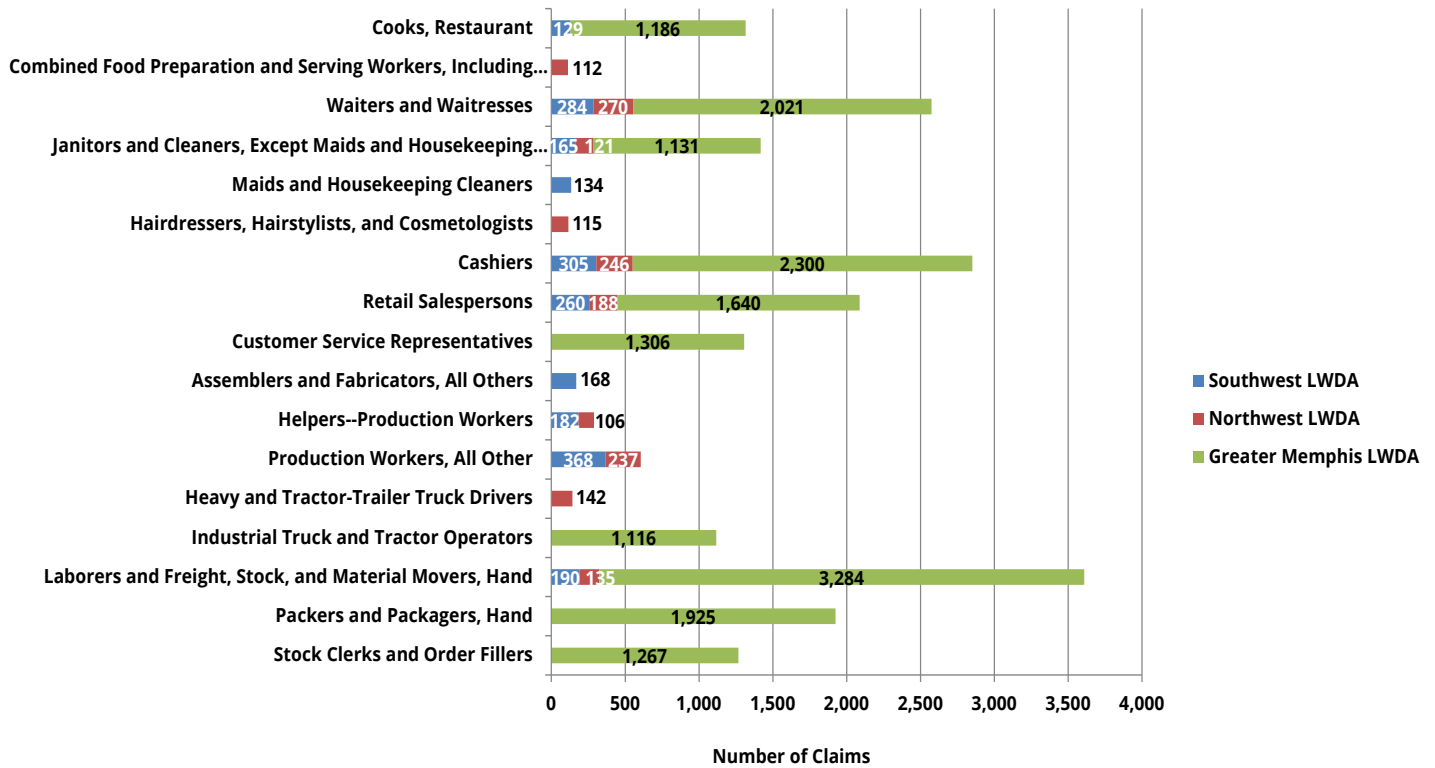
Middle Region Top Number of Claims by LWDA and Occupation



Includes the top ten occupations by number of initial and continued claims by LWDA.
 Source: TN Dept of Labor and Workforce Development WIR²ED Division PROMIS data, week ending June 27, 2020

Figure 2

West Region Top Number of Claims by LWDA and Occupation



Includes the top ten occupations by number of initial and continued claims by LWDA.
 Source: TN Dept of Labor and Workforce Development WIR²ED Division PROMIS data, week ending June 27, 2020
 Figure 3

The Department of Labor and Workforce Development, WIR²ED Division, produced short-term industry and projections for 2019-2021 in February, 2020, before the pandemic had a major effect on Tennessee employment. From these, expected occupational employment for 2020 was estimated (Table 3) and was compared to claims in the last week of June, 2020. The 20 occupations with the highest number of claims compared to occupational employment are listed in Table 3.

Virtually all manicurists and barbers filed claims; in fact, their numbers were underrepresented in the estimates. All entertainers and performers and engineering technicians filed claims, as did high percentages of others in the entertainment industry including sound engineering technicians and dancers. High percentages of chefs, bartenders, and food preparation and serving workers also filed, as did certain manufacturing and transportation-related workers including travel agents. When in-person court hearings closed, many court reporters were also out of work.

**Table 3: Highest Percent of Claims Filed to 2020 Employment
(Estimated 2020 Employment > 100)**

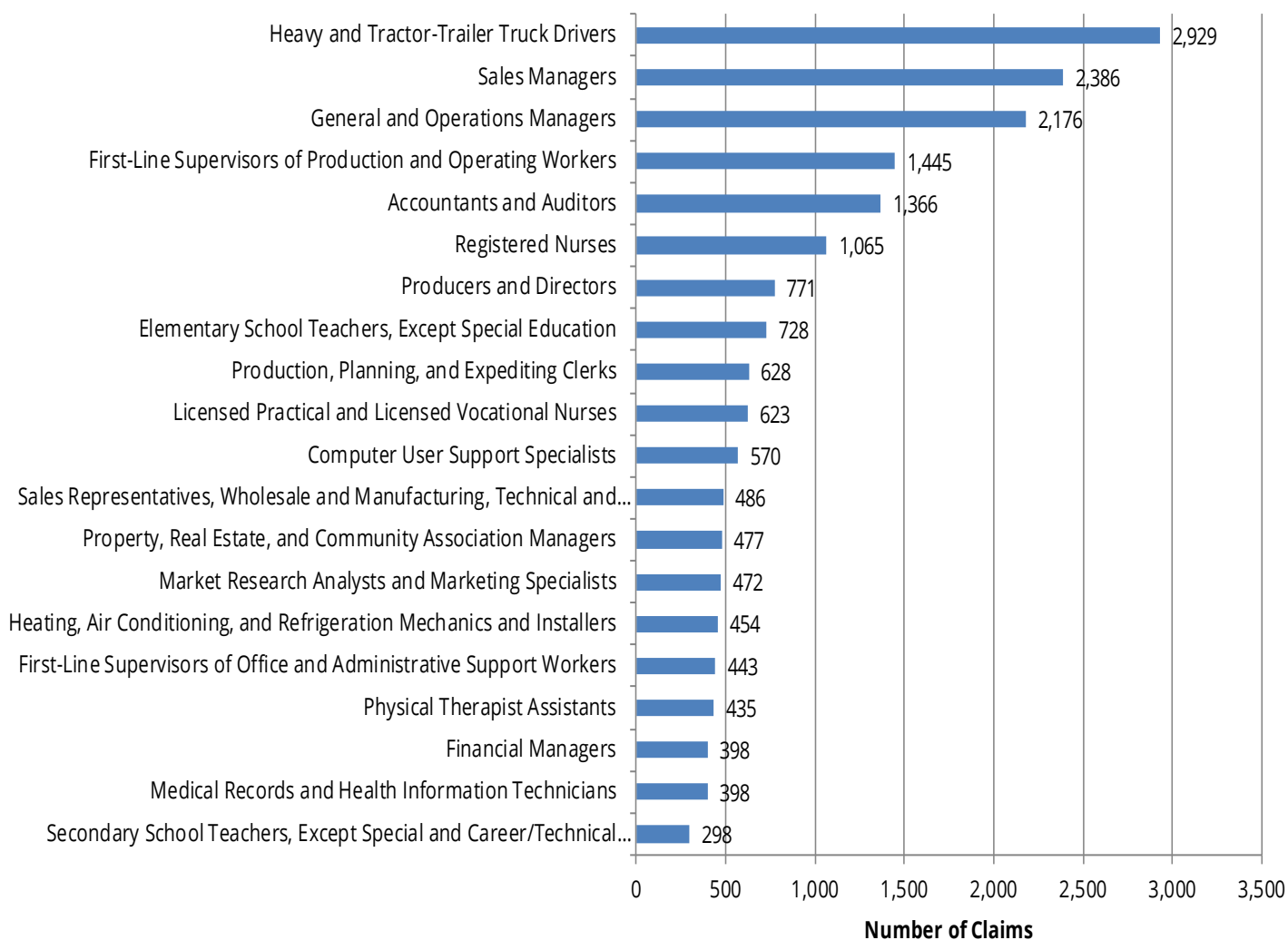
SOC Code	Occupation Title	Estimated 2020 Employment	Claims Filed as % of 2020 Employment¹
39-5092	Manicurists and Pedicurists	730	244.32%
39-5011	Barbers	510	187.45%
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	370	123.39%
17-3029	Engineering Technicians, Except Drafters, All Other	1,550	116.53%
27-4014	Sound Engineering Technicians	480	89.29%
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	230	83.44%
35-1011	Chefs and Head Cooks	2,250	82.50%
51-3093	Food Cooking Machine Operators and Tenders	330	63.86%
41-9091	Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	320	63.41%
47-2042	Floor Layers, Except Carpet, Wood, and Hard Tiles	220	61.74%
35-3011	Bartenders	7,740	60.42%
53-3031	Driver/Sales Workers	8,180	60.27%
53-6051	Transportation Inspectors	280	59.93%
19-4099	Life, Physical, and Social Science Technicians, All Other	1,220	54.58%
41-3041	Travel Agents	930	48.09%
53-7121	Tank Car, Truck, and Ship Loaders	210	47.66%
41-9099	Sales and Related Workers, All Other	2,600	45.87%
23-2091	Court Reporters	240	45.70%
35-9099	Food Preparation and Serving Related Workers, All Other	1,410	45.49%

¹Employment >100% indicates employment may have been underestimated.

Source: TN Dept of Labor and Workforce Development, WIRED Division, PROMIS Data, 6-27-2020; and TN Short Term Projections, 2019-2021

Figures 4 and 5 compare occupations identified by the department as occupations in demand in the long term with the number of initial and continued claims filed. The largest number of claims for those considered demand occupations were filed by heavy and tractor-trailer truck drivers; however, those 2,929 claimants were only four percent of the total workforce, numbering nearly 73,000 workers. Sales managers and general and operations managers, as well as production supervisors and production planning clerks also had larger numbers of claims. Healthcare workers who were claimants included registered nurses, licensed practical nurses, physical therapist assistants, health services managers, medical records technicians, and office supervisors, although claimants made up a small proportion of total employment. Elementary and secondary local government teachers also were among the claimants.

TN Demand Occupations by Total Claims 2020



Total Claims=Total initial and continued claims on June 27, 2020

Source: TN Dept of Labor and Workforce Development, WIR²ED Division, PROMIS Data, 6-27-2020 and TN Short Term Projections, 2019-2021, occupations with greater than 100 employment

Figure 4

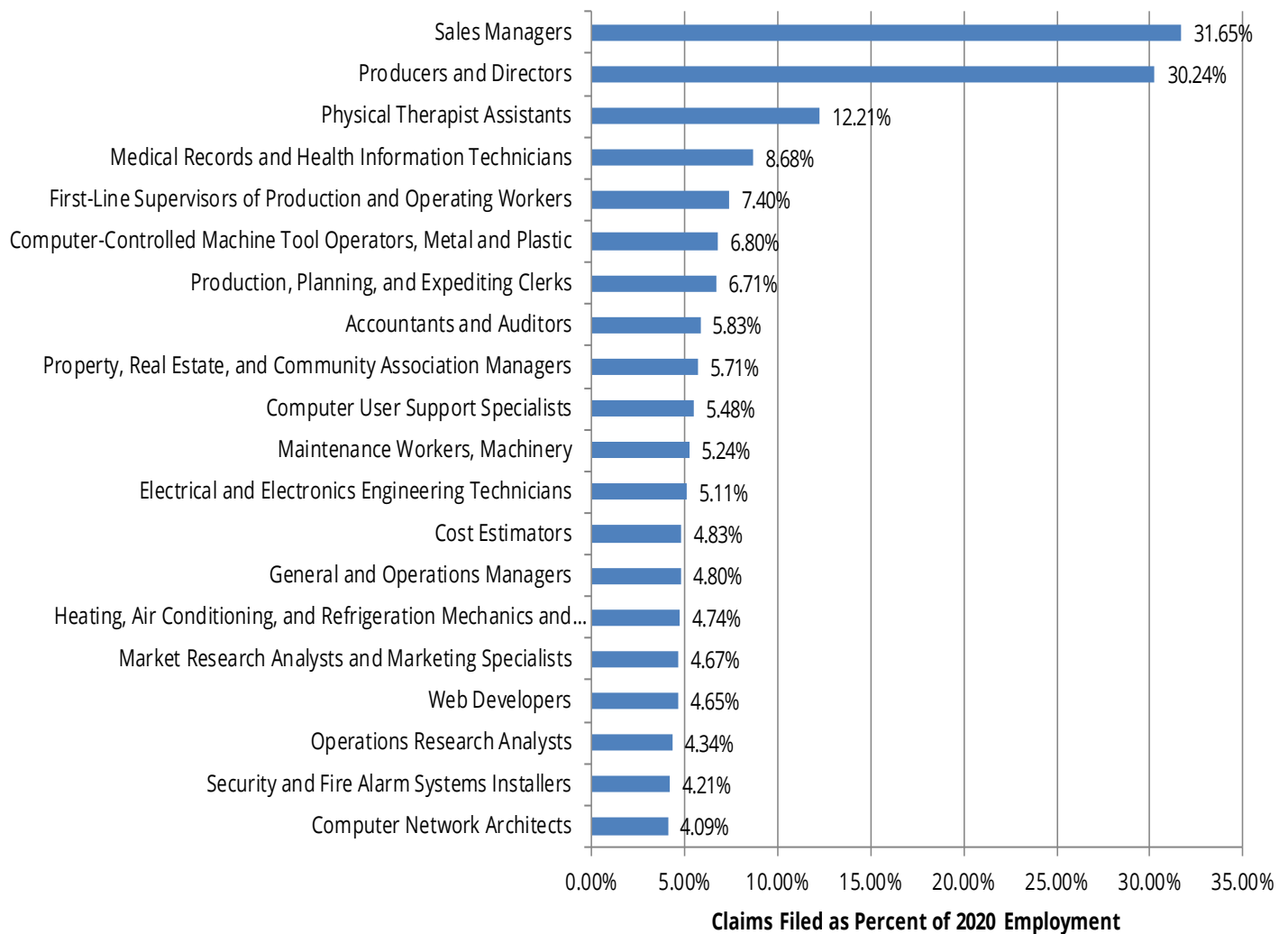
As Figure 5 shows, the demand occupations with the highest percent of claimants compared to total employment were sales managers, with nearly one of every three filing and receiving claims. The arts and entertainment occupation of producers and directors also had nearly one in three employees receiving claims. Demand occupations with higher number of claims included the healthcare occupations of physical therapist assistant and medical records technician.

Production occupations with higher numbers of claims compared to total employment included production supervisors, computer-controlled machine tool operators, production planning clerks, machinery maintenance workers, and electrical and electronic engineering technicians. However, except for physical therapist assistant at 12 percent, the percent of claims among the healthcare and production workers was less than 10 percent.

What are key points in this analysis?

- A high proportion of those filing claims are low-skilled workers, who will continue to need significant claims assistance until leisure and hospitality and other related sectors are able to operate safely.
- Professional workers with higher numbers of claims include several sales, finance, and marketing jobs.
- Local governments have had to lay off workers in both education and general government sectors.
- Many demand occupations outside of the entertainment industry and certain manufacturing industries should continue to have some opportunities for employment, although that may depend significantly on the geographic area.

TN Demand Occupations by Claims Filed as Percent of 2020 Employment



Source: TN Dept of Labor and Workforce Development, WIRED Division, PROMIS Data, 6-27-2020 and TN Short Term Projections, 2019-2021

Figure 5

Essential Industries: The detailed industries listed below increased in employment over the year from May 2019 to May 2020, continuing to grow from April 2020 through May 2020 (see Table 4). Included are industries in both the goods producing and services-providing industries. Essential industries, needed for survival while individuals sheltered at home or began working from home and students were no longer in school, included food and beverage stores (including grocery stores) and other stores which sell food but are classified in other industries (including gas stations and general merchandise stores).

Transportation and warehousing increased as more goods were ordered from home rather than purchased in stores, intensifying e-commerce and its supporting industries. Computer manufacturing employment growth was supported by the need for technology for increased online presence in education, work, and leisure environments.

Construction of buildings, which added 3,200 jobs over the year, continued its growth as projects in the pipeline were being completed, buoying some durable goods manufacturing industries. Individuals at home also increased purchases of building materials and garden supplies, as increased leisure time created a focus on home improvement projects. Expanded federal government expenditures to support the economy stabilized its employment. Jobs in these essential industries were posted on the jobs4tn.gov website as employment expanded.

Table 4: Detailed Industries with Increased Employment Over the Month and Year, May 2020

Industry Title	May 2020	April 2020	May 2019	May 2020 - April 2020 Employment Change	May 2020 - May 2019 Employment Change
Total Nonfarm	2,855,400	2,758,700	3,112,600	96,700	-257,200
Goods Producing	439,500	417,000	487,900	22,500	-48,400
Construction of Buildings	28,500	27,300	25,300	1,200	3,200
Wood Product Manufacturing	12,800	12,200	12,400	600	400
Primary Metal Manufacturing	11,600	11,200	11,500	400	100
Machinery Manufacturing	26,000	24,500	25,900	1,500	100
Computer and Electronic Product Manufacturing	5,700	5,500	5,400	200	300
Furniture and Related Product Manufacturing	10,600	9,000	9,400	1,600	1,200
Chemical Manufacturing	25,800	25,700	25,700	100	100
Service-Providing	2,415,900	2,341,700	2,624,700	74,200	-208,800
Building Material and Garden Equipment	33,200	31,600	32,300	1,600	900
Food and Beverage Stores	56,400	55,500	54,600	900	1,800
Gasoline Stations	24,600	23,900	23,200	700	1,400
General Merchandise Stores	74,800	71,500	72,400	3,300	2,400
Transportation and Warehousing	174,100	173,400	170,900	700	3,200
Federal Government	50,200	50,100	49,900	100	300

Source: TDLWD, WIR²ED Division, TN Current Employment Statistics, May 2020, Seasonally Unadjusted Data, Current Employment Statistics May 2020 Seasonally Adjusted Data, Preliminary.

What are some of the changes from COVID-19 that might affect the Tennessee economy in the longer run? An important question is whether self-employment will increase. One of the primary ways of collecting information on self-employment is the Current Population Survey which continuously surveys samples of households in the states. This survey has not shown evidence of increasing self-employment as the gig economy has been emerging. However, administrative records such as 1099 returns from the IRS are have shown some growth in self-employment.¹ Economists have suggested ways to change the questions on the CPS to better reflect different kinds of self-employment; until those questions are changed or researchers have better access to administrative data, the answer to this question will not be available.

According to current research, several trends are likely.² If work at home at increases, with the potential for new jobs closer to where people live, there may be more job growth outside of metropolitan areas. This could cause negative effects on business support services such as restaurants, hotels, cleaning, and maintenance services, hurting lower-wage workers.³ Lower-wage workers could also be displaced if more routine, lower-skilled jobs are displaced with the faster adoption of technology. But lack of funds for investment could slow this trend.

A third potential trend could be re-shoring of manufacturing, with COVID-19 disrupting off-shore supply chains. This has reinforced trends such as higher labor, transportation costs, and issues of product safety. Industries identified as more likely to re-shore are the following, many of which are prominent in Tennessee:

- Automobile bodies and trailers;
- Other transportation equipment manufacturing;
- Navigational, measurement equipment and control instruments;
- Basic chemicals;
- Semi-conductor and electronics components manufacturing;
- Medical equipment and supplies;
- Communications equipment manufacturing; and
- Aerospace products and parts.

Better ways to communicate through technology and re-shoring of manufacturing could also mean less international business travel and cause the airlines to continue to have reduced employment.⁴

¹ K. Abraham, J. Haltiwanger, K. Sandusky, J. Spletzer. Measuring the gig economy: current knowledge and open issues. National Bureau of Economic Research, January 9, 2020. <https://www.nber.org/chapters/c13887>.

² Dr. Susan N. Houseman, director of research at the Upjohn Institute for Employment Research, Projections Managing Partnership Summit presentation August 20, 2020. "Measuring industry and occupations trends beyond COVID-19".

³ D. Autor and E. Reynolds. The nature of work after the COVID crisis; too few low-wage jobs. [autorReynolds_LO_Final.pdf.hamiltonproject.org](#). Downloaded September 10, 2020.

⁴ Federal Reserve Bank of Atlanta. Businesses anticipate slashing post pandemic travel budgets. August 4, 2020. <https://www.frbatlanta.org/blogs/macroblog/2020/08/04/businesses-anticipate-slashing-postpandemic-travel-budgets> Downloaded September 10, 2020.



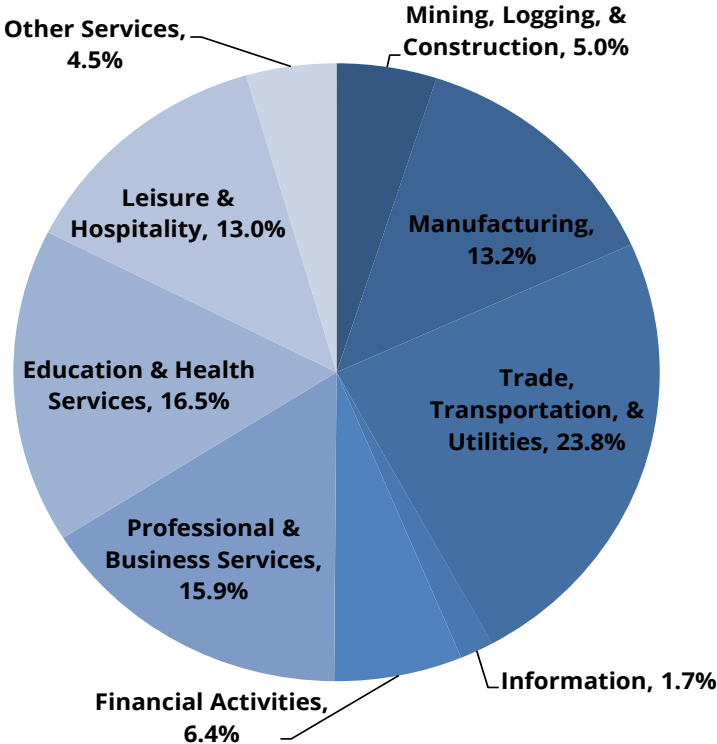
Tennessee Employment 2019

Tennessee’s average annual nonfarm employment increased 1.9 percent from 2018 to 2019, adding 58,800 jobs. Goods producing jobs grew at a rate of 2.1 percent compared to 2.2 percent for private service-providing jobs. Jobs in the government sector grew by 0.3 percent. In the goods producing sector, mining, logging, and construction grew by 5,400 jobs while manufacturing increased by 4,600 jobs .

Among the private service-providing industries, those with the largest job increases were trade, transportation, and utilities services which added 12,200 jobs, and leisure and hospitality which added 11,400 jobs. Within the trade, transportation, and utilities services, transportation, warehousing, and utilities accounted for 10,900 of the added jobs while accommodation and food services accounted for 8,500 of the 11,400 jobs added in the leisure and hospitality sector. State government and retail trade experienced a decline from 2018 to 2019 with a loss of 2,200 and 500 jobs respectively.

Since 2014, Tennessee has added 300,000 jobs, a 10.6 percent increase. Leisure and hospitality led the way adding 52,600 jobs. Of those jobs, 42,300 were added in accommodation and food services, and 10,200 were added in arts, entertainment, and recreation. Other sectors gaining over 25,000 jobs included manufacturing; trade, transportation and utilities; financial activities; professional and business services; and education and health services. No industry experienced a decline of jobs from 2014 to 2019.

2019 Private Sector Employment



Source: TN Department of Labor & Workforce Development, Current Employment Statistics

Figure 6

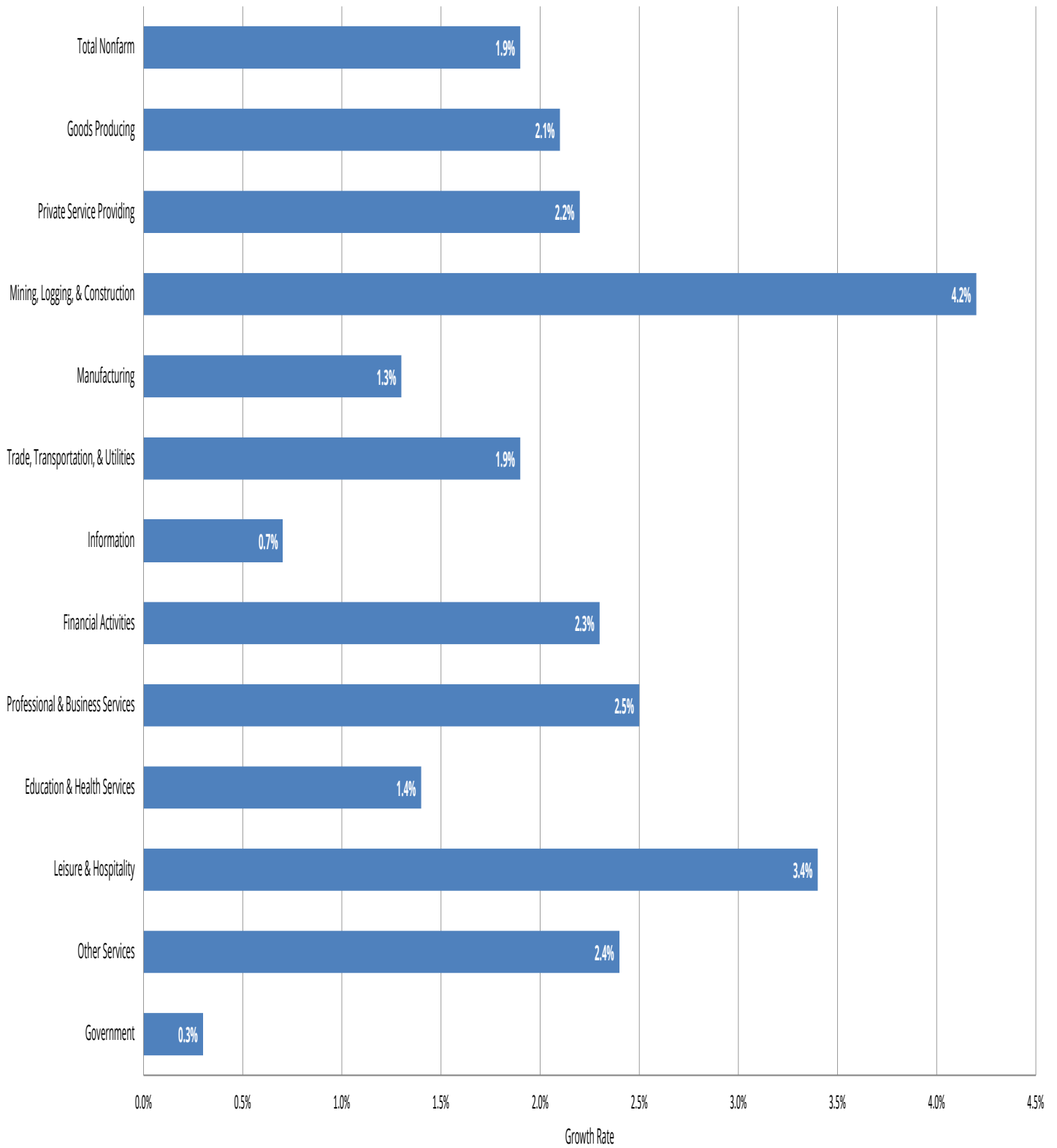
Table 5: Tennessee Industry Employment, 2014-2019

Industry Employment (in thousands)	2014	2018	2019	18-19	18-19 %	14-19	14-19 %
Total Nonfarm	2,822.1	3,063.3	3,122.1	58.8	1.9%	300.0	10.6%
Goods Producing	433.7	479.4	489.4	10.0	2.1%	55.7	12.8%
Mining, Logging, & Construction	111.0	128.9	134.3	5.4	4.2%	23.3	21.0%
Manufacturing	322.7	350.5	355.1	4.6	1.3%	32.4	10.0%
Durable Goods Manuf.	205.5	224.1	227.4	3.3	1.5%	21.9	10.7%
Non Durable Goods Manufacturing	117.3	126.4	127.7	1.3	1.0%	10.4	8.9%
Private Service-Providing	1,964.2	2,148.1	2,195.5	47.4	2.2%	231.3	11.8%
Trade, Transportation, & Utilities	587.8	626.5	638.7	12.2	1.9%	50.9	8.7%
Wholesale Trade	118.0	119.3	121.0	1.7	1.4%	3.0	2.5%
Retail Trade	320.9	335.8	335.3	-0.5	-0.1%	14.4	4.5%
Transportation, Warehousing, & Utilities	148.9	171.5	182.4	10.9	6.4%	33.5	22.5%
Information	44.0	45.2	45.5	0.3	0.7%	1.5	3.4%
Financial Activities	144.2	168.4	172.2	3.8	2.3%	28.0	19.4%
Finance & Insurance	109.5	127.8	130.1	2.3	1.8%	20.6	18.8%
Real Estate, Rental & Leasing	34.6	40.6	42.1	1.5	3.7%	7.5	21.7%
Professional & Business Services	379.9	416.1	426.6	10.5	2.5%	46.7	12.3%
Professional, Scientific & Technical Services	122.9	140.6	146.7	6.1	4.3%	23.8	19.4%
Management of Companies & Enterprises	41.9	49.0	51.7	2.7	5.5%	9.8	23.4%
Admin, Support, Waste Mgt & Remediation Services	215.1	226.6	228.2	1.6	0.7%	13.1	6.1%
Education & Health Services	405.8	435.9	442.2	6.3	1.4%	36.4	9.0%
Educational Services	55.0	61.0	62.1	1.1	1.8%	7.1	12.9%
Health Care & Social Assistance	350.8	374.9	380.2	5.3	1.4%	29.4	8.4%
Leisure & Hospitality	296.5	337.7	349.1	11.4	3.4%	52.6	17.7%
Arts, Entertainment & Recreation	32.4	39.8	42.6	2.8	2.4%	15.1	14.2%
Accommodation & Food Services	264.1	297.9	306.4	8.5	2.9%	42.3	16.0%
Other Services	106.1	118.4	121.2	2.8	2.4%	15.1	14.2%
Government	424.2	435.8	437.2	1.4	0.3%	13.0	3.1%
Federal Government	48.4	49.1	50.1	1.0	2.0%	1.7	3.5%
State Government	96.5	99.0	96.8	-2.2	-2.2%	0.3	0.3%
Local Government	279.3	287.6	290.4	2.8	1.0%	11.1	4.0%

Source: TN Department of Labor & Workforce Development, Current Employment Statistics

Table 1 shows that total Tennessee nonfarm employment was 3 million, 122 thousand, 1 hundred in 2019. The most rapidly growing industries during 2014-2019 were arts, entertainment, and recreation; management of companies and enterprises; and transportation, warehousing, and utilities.

Tennessee Job Growth 2018-2019



Source: TN Department of Labor & Workforce Development, Current Employment Statistics

Figure 7

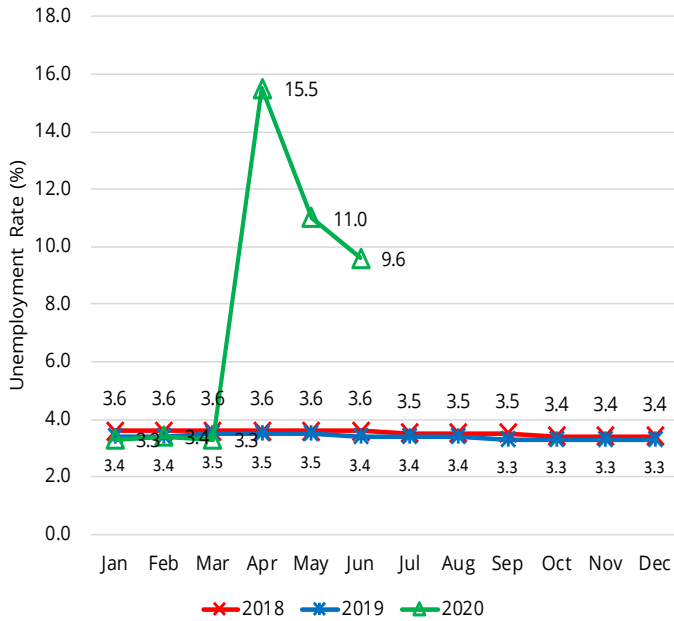


Labor Force & Demographics

Tennessee Labor Force and Demographics

Tennessee's June 2020 seasonally adjusted unemployment rate was 9.6 percent, a decrease from the revised May 2020 rate of 11.0 percent. Over the past year, Tennessee's seasonally adjusted unemployment rate for increased from 3.4 percent in June 2019 to 9.6 percent in June 2020 while the national rate increased from 3.7 percent to 11.1 percent. The annual average unemployment rate for the U.S. in 2010 was 9.6 percent and dropped to 3.7 percent in 2019, a decrease of 5.9 percent. Tennessee's annual average in 2010 was 9.7 percent and declined to 3.4 percent in 2019, a decrease of 6.3 percent, which is more significant than the United States.

Unemployment Rates - Tennessee
Seasonally Adjusted - 2018 to 2020



Source: TN Department of Labor & Workforce Development, Local Area Unemployment Statistics, July 2020

Figure 8

Unemployment Rates - US & Tennessee
Seasonally Adjusted - January 2013 to June 2020

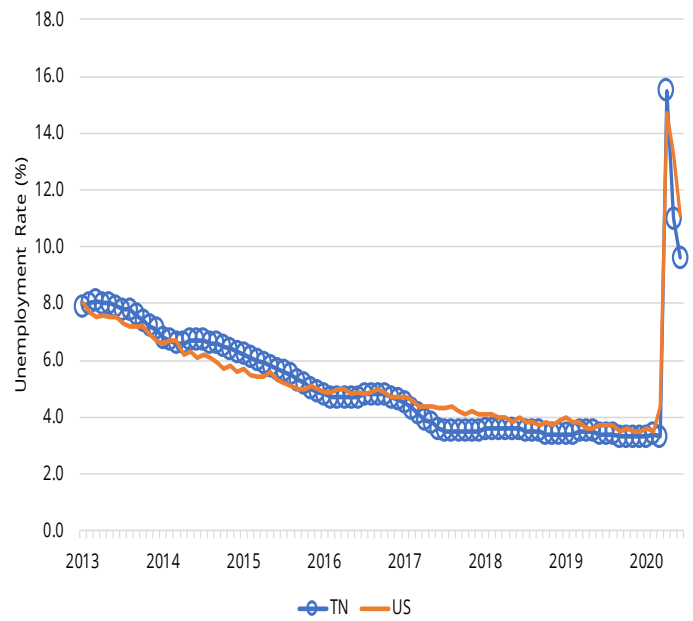


Figure 9

Table 6: U.S. & TN Annual Not Seasonally Adjusted Unemployment Rates, 2010-2019

	2010 Unemp. Rate	2011 Unemp. Rate	2012 Unemp. Rate	2013 Unemp. Rate	2014 Unemp. Rate	2015 Unemp. Rate	2016 Unemp. Rate	2017 Unemp. Rate	2018 Unemp. Rate	2019 Unemp. Rate
United States	9.6%	8.9%	8.1%	7.4%	6.2%	5.3%	4.9%	4.4%	3.9%	3.7%
Tennessee	9.7%	9.0%	7.8%	7.8%	6.6%	5.6%	4.7%	3.8%	3.5%	3.4%

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, July 2020



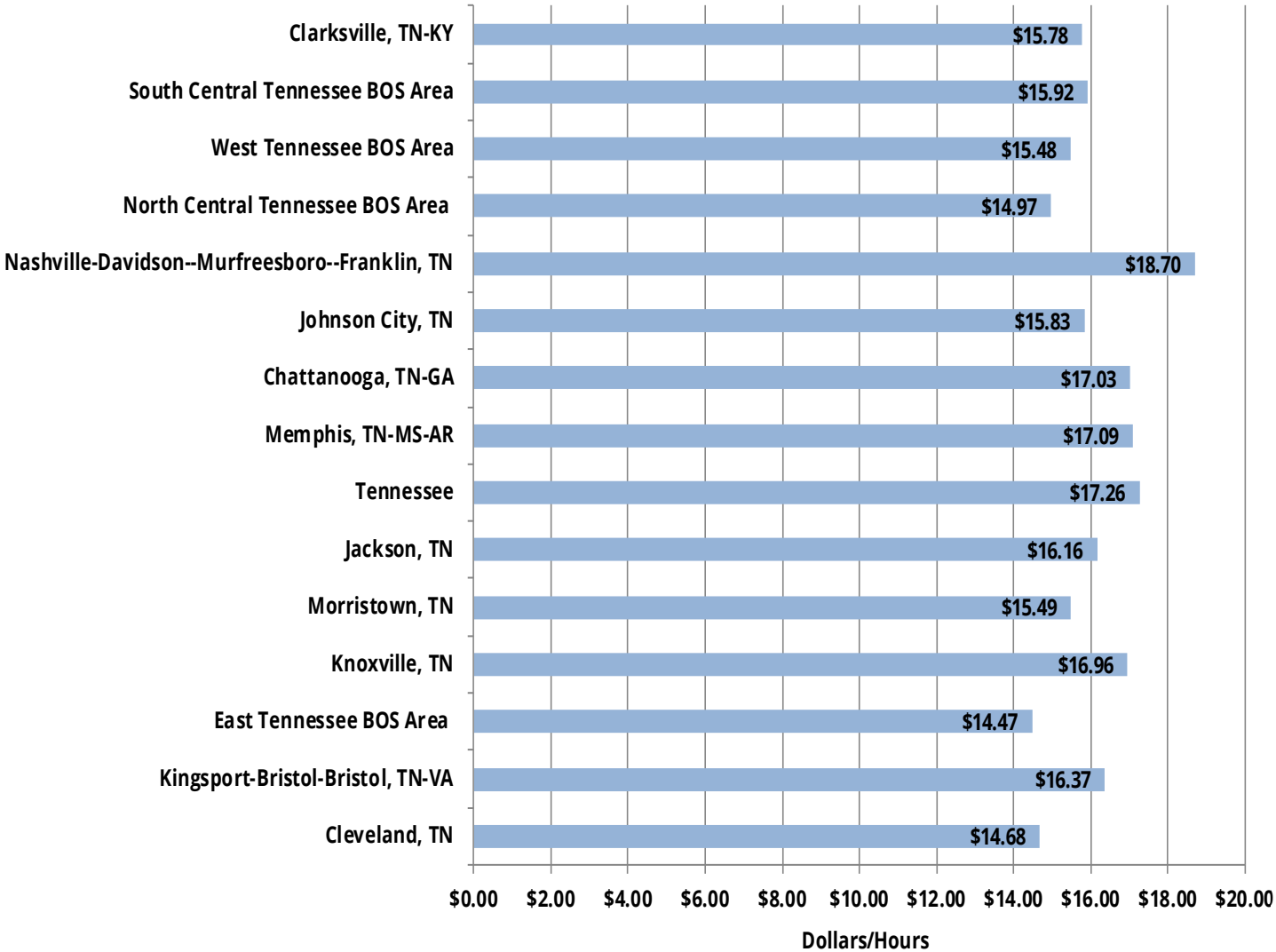
Tennessee Wages 2019

Among the 22 major occupational groups, median wages increased for 19 of the groups. The highest percentage changes were for personal care and service occupations (7.38 percent), office and administrative support occupations (6.11 percent), and for sales and related occupations (3.65 percent). The four major groups experiencing a decrease were healthcare support occupations (-5.51 percent), farming, fishing, and forestry occupations (-2.76 percent), computer and mathematical occupations (-0.61 percent), and transportation and material operations occupations (-0.07 percent).

Median hourly wage growth for Tennessee from 2018 to 2019 averaged 2.86 percent. All areas, except for one, reported increases. The top three areas displaying percentage changes greater than the state included the Clarksville MSA (3.95 percent), South Central Tennessee BOS Area (3.78 percent), and West Tennessee BOS Area (3.41 percent). Below the state's growth rate was the East Tennessee BOS Area (1.54 percent).

There was only one area that reported a loss in median wages over the same period. That area was the Cleveland MSA at -1.87 percent.

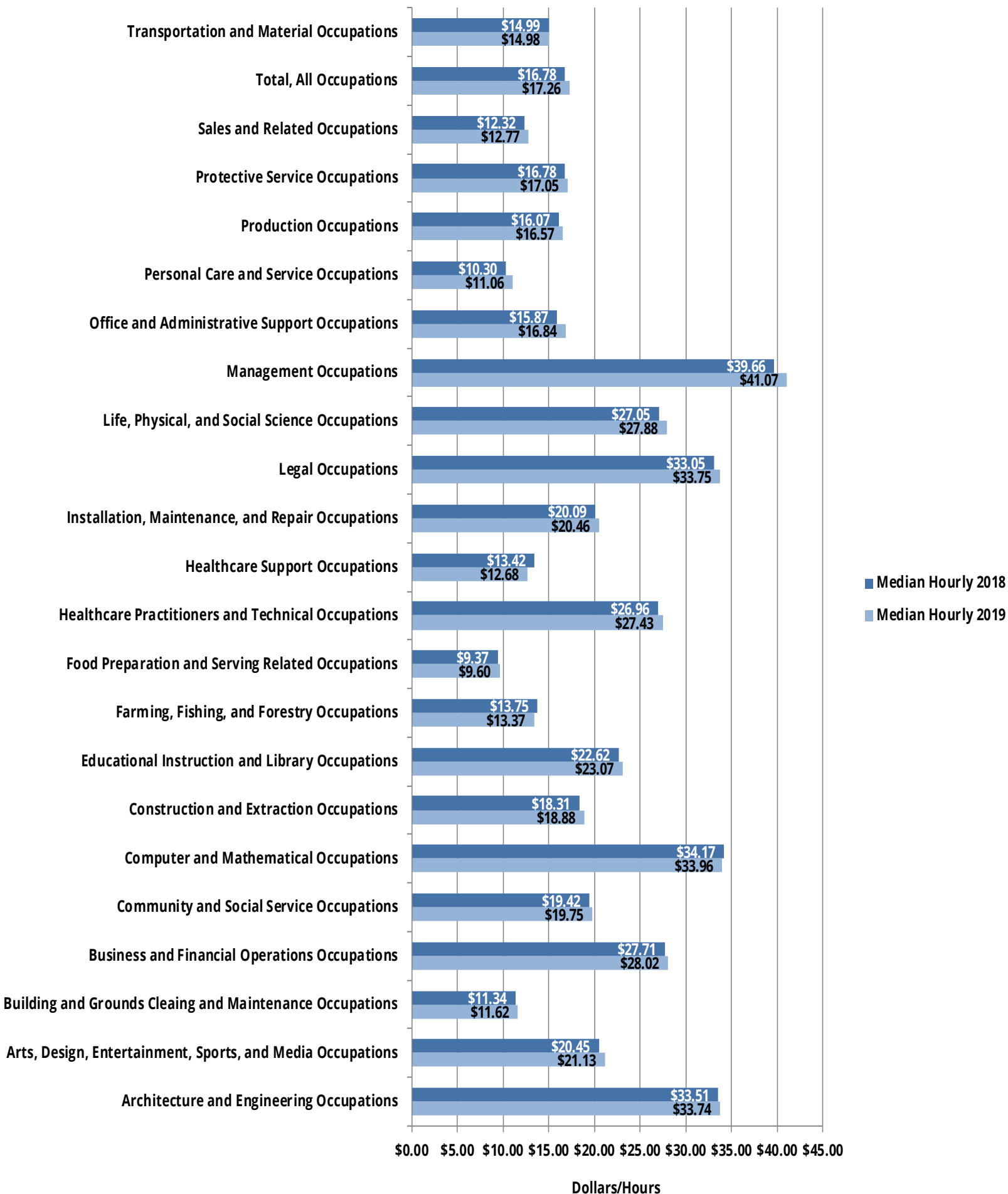
2019 Median Hourly Wages, State and Sub-State Areas



Source: TN Department of Labor & Workforce Development, Occupational Employment Statistics, May 2019

Figure 10

Median Hourly Wages, Major Occupational Groups



Source: TN Department of Labor & Workforce Development, Occupational Employment Statistics, May 2019

Figure 11



Tennessee Occupational Injuries, Illnesses, and Fatalities 2018

Labor Research and Statistics is part of WIR²ED, Labor Market Information Section of the Tennessee Department of Labor and Workforce Development. They conduct the annual Survey of Occupational Injuries and Illnesses (SOII) from a random sample of public and private sector companies in Tennessee as well as the Census of Fatal Occupational Injuries (CFOI).

The data collected from the SOII survey is used to produce the occupational injury and illness rates for industries within the State of Tennessee, it also provides demographic and case characteristic data for work-related injuries and illnesses that result in days away from work or days of job transfer or restriction. The calculated rates represent the number of recordable occupational injuries and illnesses per 100 full-time equivalent employees. The survey is conducted in conjunction with the Bureau of Labor Statistics, U.S. Department of Labor.

Additional information can be found at <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/occupational-injuries--and-fatalities-statistics.html> or <https://www.bls.gov/iif/oshstate.htm#TN>.

Tennessee Survey of Occupational Injuries and Illnesses (SOII), 2018 Highlights

The total recordable incidence rate for all industries in Tennessee per 100 full-time equivalent workers during 2018 was estimated to be 3.0. The total recordable rate for private industry was 2.8 and the total recordable rate for public sector industries was 4.0.

- The highest total recordable case rate in private industry was in the major industry sector of transportation and warehousing at 4.2.
- The lowest total recordable case rate in private industry was in the major industry sector of finance and insurance at 0.3.
- There was an estimated 19,130 occupational injuries and illnesses in Tennessee including all ownerships during 2018 that resulted in lost days away from work.
- 60 percent of the occupational injuries and illnesses in Tennessee involving days away from work were sustained by men, while 40 percent were sustained by women.
- 34 percent of the occupational injuries and illnesses in Tennessee involving days away from work were the result of a sprain, strain or tear to a ligament or tendon.
- 30 percent of the occupational injuries and illnesses in Tennessee involving days away from work were due to overexertion or bodily reactions. An additional 29 percent were due to slips, trips and falls.
- In 33 percent of the occupational injuries and illnesses resulting in days away from work the injured employee suffered an injury to the upper extremities. In 26 percent of the cases the injury was to the lower extremities and in 19 percent of the cases the injury was to the trunk.

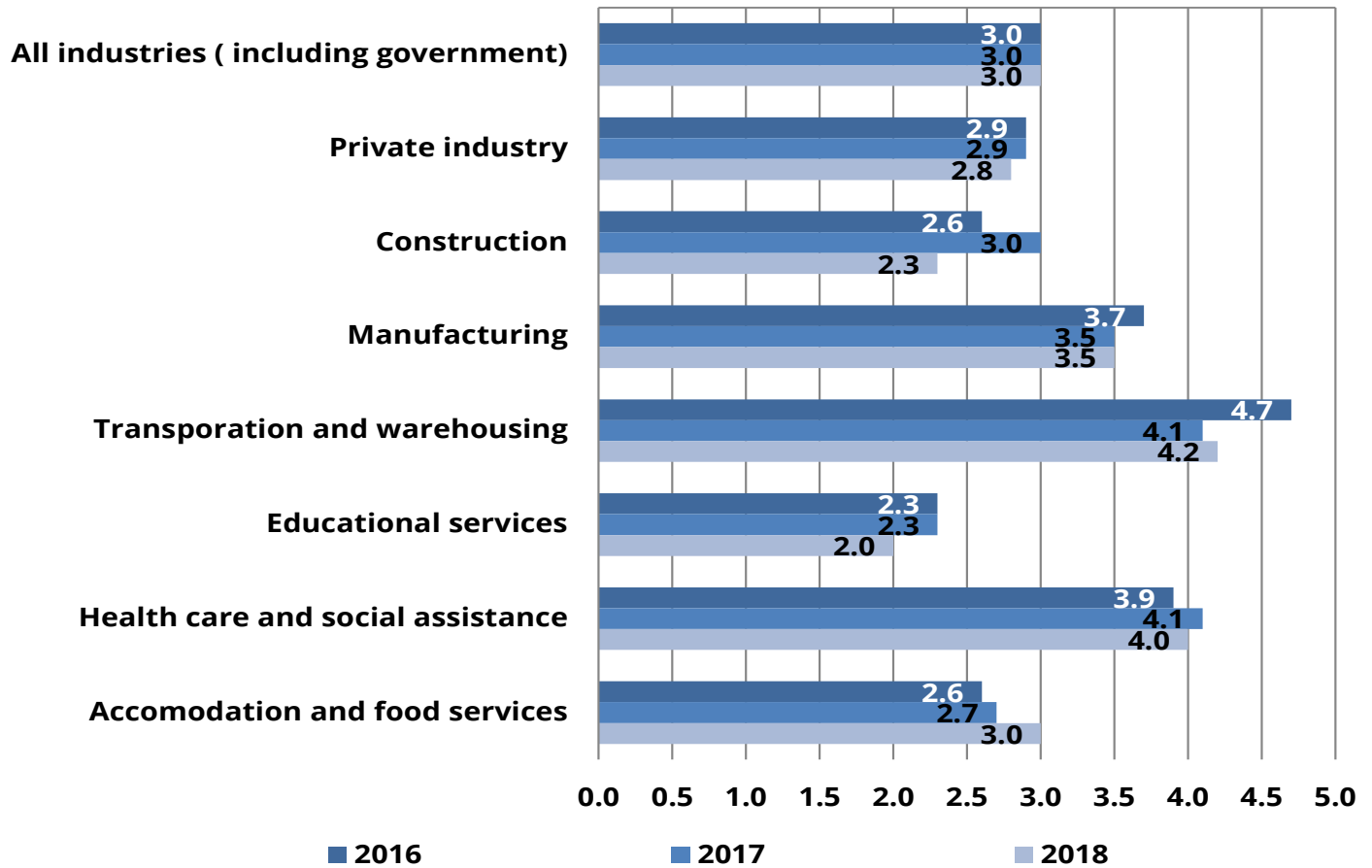
Source: TN Department of Labor, Labor Research & Statistics, WIR²ED, November 7, 2019.

Table 7: Number of nonfatal occupational injuries and illnesses involving days away from work¹ by major occupational group and selected worker occupations, all ownerships, Tennessee, 2018

Occupation	All Ownerships
Total	19,130
Management occupations	260
Education, training, and library occupations	490
Elementary school teachers, except special education	240
Healthcare practitioners and technical occupations	1,090
Registered nurses	410
Emergency medical technicians and paramedics	230
Licensed practical nurses	130
Healthcare support occupations	710
Nursing assistants	460
Protective service occupations	1,400
Police and sheriff's patrol officers	580
Firefighters	180
Correctional officers and jailers	340
Security guards	140
Food preparation and serving related occupations	1,100
Combined food preparation and serving workers, incl. fast food	200
Food preparation workers	350
Cooks, institution and cafeteria	100
Cooks, restaurant	150
Building and grounds cleaning and maintenance occupations	1,190
Janitors and cleaners, except maids and housekeeping cleaners	380
Landscaping and groundskeeping workers	400
Maids and housekeeping cleaners	210
Personal care and service occupations	560
Personal care aides	240
Sales and related occupations	1,180
Retail salespersons	490
First-line supervisors of retail sales persons	450
Office and administrative support occupations	1,160
Stock clerks and order fillers	380
Construction and extraction occupations	870
Construction laborers	250
Installation, maintenance, and repair occupations	1,580
Maintenance and repair workers, general	580
Production occupations	2,670
Tire builders	250
Team assemblers	230
Transportation and material moving occupations	4,420
Heavy and tractor-trailer truck drivers	1,340
Light truck or delivery services drivers	490
Laborers and freight, stock and material moving workers, hand	1,720

¹ Days-away-from-work cases include those that result in days away from work with or without job transfer or restriction.

Incidence rates of nonfatal occupational injuries and illnesses by selected industry sectors Tennessee, private industry, 2016-2018



Note: Because of rounding and data exclusion on non-classifiable responses, data may not sum to the totals
 Source: TN Department of Labor, Labor Research & Statistics, WIR²ED, November 7, 2019.

Figure 12

The major industry sector consisting of transportation and warehousing had the highest incidence rate for any private industry sector in Tennessee during 2018 with a recordable incidence rate of 4.2 per 100 full-time equivalent workers. The major industry sector of educational services had the lowest incidence rate with a recordable rate of 2.0 per 100 full-time equivalent workers.

Tennessee Census of Fatal Occupational Injuries (CFOI), 2018 Highlights

There were 122 fatal work-related injuries in Tennessee during 2018, a decrease of 5 percent over the 128 recorded during 2017.

- There were 93 fatal work injuries to wage and salary workers and 29 to self-employed persons
- There were 113 fatal work injuries to men and 9 fatal work injuries to women.
- There were 118 fatal work injuries in the private sector and 4 to government workers.
- Fatal work-related injuries due to transportation incidents decreased 26 percent from 2017 to 2018 while fatal work-related incidents of violence increased by 15 percent.
- There were 96 fatal work-related injuries to White (non-Hispanic) workers, 16 to Black or African-American (non-Hispanic) workers, 6 to Hispanic or Latino workers, and 4 to Asian (non-Hispanic) workers.
- The highest number of fatal occupational injuries occurred to workers in the major occupational group of transportation and material moving workers with 35 work fatalities.
- The range of workers between the ages of 55 to 64 suffered the most fatal work injuries in Tennessee during 2018 with 29 or 24 percent of the yearly total number of work fatalities.

**Table 8: Fatal work related injuries by event or exposure
Tennessee, 2015-2018**

Event or exposure	2018	2017	2016	2015
Transportation incidents	42	57	42	47
Violence and other injuries by persons or animals	23	20	26	15
Contact with objects and equipment	24	18	26	21
Falls, slips, trips	19	21	20	17
Exposure to harmful substances or environments	10	12	6	12
Fires and explosions	4	--	2	--
Yearly Totals	122	128	122	112

Note: Totals for major categories may not sum to yearly totals. Dashes indicate no data or data that do not meet publication criteria

Source: TN Department of Labor, Labor Research & Statistics, WIR²ED, December 17, 2019.



Tennessee Long Term Outlook to 2028

From a base of 3.3 million jobs in 2018, total employment for Tennessee, including agricultural, self-employed, and private household workers, is expected to grow to 3.5 million by 2028. Expected to increase by 0.7 percent annually, Tennessee's economy in the long run is expected to continue expansion in nine of twelve major industry sectors.

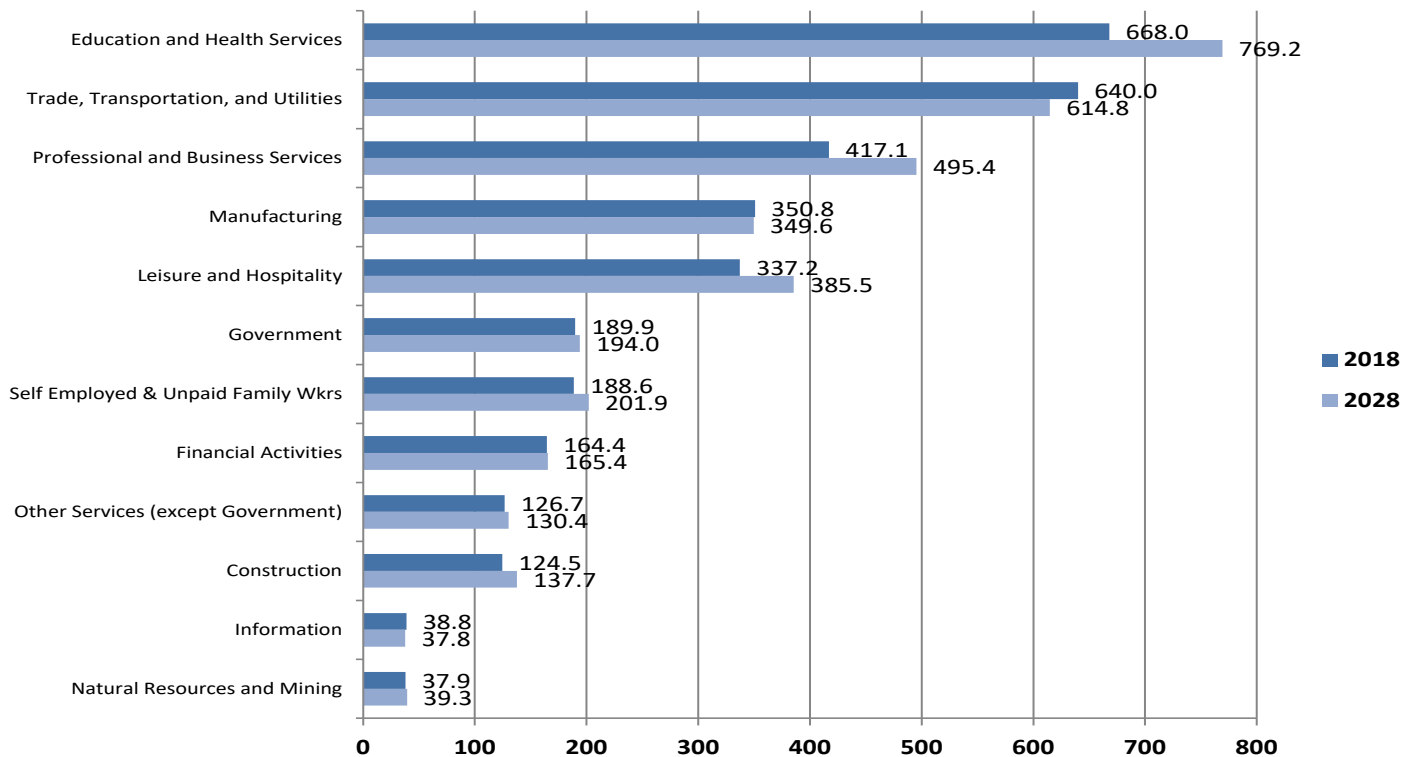
The goods producing industries are expected to expand by 0.2 percent and create an estimated 13,400 jobs. Construction is forecast to be the most rapidly growing sector at one percent annually, faster than the overall growth in the economy. However, manufacturing employment is expected to decline slightly. Natural resources and mining, which includes agriculture, is expected to add just over 1,000 jobs.

The service-providing sector is expected to grow more rapidly than the goods producing sector, but still less than one percent annually. Growth will be slowed by expected employment reductions in trade, transportation, and utilities (especially in retail trade) of more than 25,000 jobs. Continued losses in the information sector are forecast due to employment reductions and consolidation in the newspaper, periodical, and book publishing industries and continued technological expansion.

The service-providing industries expected to have the largest employment growth are education and health services, professional and business services, and leisure and hospitality, forecast to add a total of 228,000 jobs by 2028. As the financial sector increasingly automates and fintech expands, growth in that sector is expected to be flat. Government will experience slight growth.

With the expansion of e-commerce and changes in work organization, the number of self-employed and unpaid family workers is expected to grow at the same rate as the average for all employment (0.7 percent annually).

Major Industry Sector Employment, 2018-2028

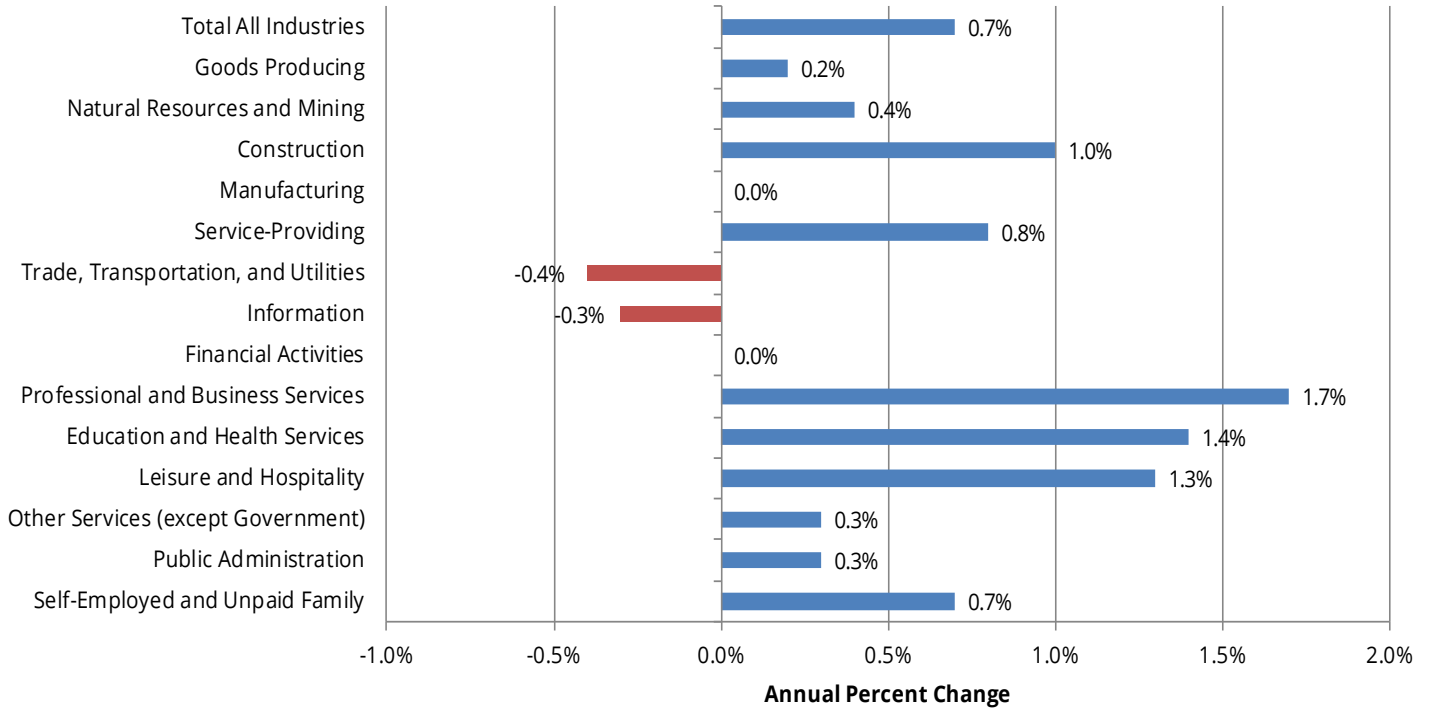


Note: Numbers reported are in the thousands

Source: TN Department of Labor and Workforce Development, WIR²ED Division, TN Long Term Industry Projections, 2018-2028

Figure 13

**Tennessee Major Industry Sector Employment,
Annual Percent Change 2018-2028**



Source: TN Department of Labor and Workforce Development, WIR²ED Division, TN Long Term Industry Projections, 2018-2028
Figure 14

The most rapidly-growing occupational groups are listed in the following table. Two are in the education and health services industry- healthcare support and healthcare practitioners and technical occupations. These are two of the occupational groups which in the long term are expected to grow twice as rapidly as the average for all occupations. Other rapidly- growing groups are expected to be personal care and service; life, physical, and social science; and computer and mathematical occupations. Of the top five major groups, two (healthcare support and personal care) have median wages that are below the median for all occupations.

Table 9: Occupational Projections (Long-term) by Major Occupational Group In Tennessee in 2018-2028

Major Occupation Title	2018 Estimated Employment	2028 Estimated Employment	Total 2018-2028 Employment Change	2018-2028 Annual Avg. Percent Change	Median Wage 2019
Total All	3,283,030	3,521,090	238,060	0.70%	\$35,909
Healthcare Support	78,050	93,650	15,610	1.84%	\$26,364
Personal Care and Service	106,390	127,020	20,630	1.79%	\$23,017
Life, Physical, and Social Science	19,570	22,910	3,330	1.59%	\$57,995
Computer and Mathematical	60,140	69,160	9,020	1.41%	\$70,633
Healthcare Practitioners and Technical	205,040	235,570	30,530	1.40%	\$57,054
Food Preparation an Serving Related	281,290	320,020	38,730	1.30%	\$19,966
Community and Social Services	50,610	56,910	6,310	1.18%	\$41,079
Protective Services	71,240	79,480	8,240	1.10%	\$35,462
Management	233,290	260,050	26,770	1.09%	\$85,418
Business and Financial Operations	142,320	157,670	15,350	1.03%	\$58,272
Building and Grounds Cleaning and Maintenance	104,810	115,670	10,850	0.99%	\$24,179
Construction and Extraction	114,290	126,030	11,740	0.98%	\$39,270
Architecture and Engineering	46,280	50,760	4,480	0.93%	\$70,175
Education, Training, and Library	171,270	187,270	16,000	0.90%	\$47,980
Arts, Design, Entertainment, Sports, and Media	48,400	52,590	4,200	0.83%	\$43,952
Legal	17,150	18,600	1,450	0.82%	\$70,2020
Installation, Maintenance, and Repair	135,140	143,270	8,130	0.59%	\$42,558
Transportation and Material Moving	292,780	309,420	16,640	0.55%	\$31,162
Farming, Fishing, and Forestry	23,820	24,460	640	0.27%	\$27,813
Office and Administrative Support	495,330	496,910	1,580	0.03%	\$35,032
Production	274,600	274,010	-600	-0.02%	\$34,457
Sales and Related	311,230	299,660	-11,570	-0.38%	\$26,554

Source: TN Department of Labor and Workforce Development, WIR?ED Division, TN Long Term Industry Projections, 2018-2028

**Most Rapidly Growing Occupational Groups-Top Three
Growth Occupations**

Occupation	Total Employment Change 2018-2028	Annual Avg. % Change 2018-2028
Healthcare Support		1.84%
Phlebotomists	1,117	4.04%
Home Health Aides	1,920	3.15%
Psychiatric Aides	512	2.73%
Personal Care and Service		1.79%
Personal Care Aides	10,251	3.63%
Residential Advisors	2,468	2.75%
Nonfarm Animal Caretakers	1,135	2.09%
Life, Physical, Social Science		1.59%
Forensic Science Technicians	334	5.13%
Biochemists and Biophysicists	440	4.94%
Medical Scientists, Except Epidemiologists	578	3.42%
Computer and Mathematical		1.41%
Operations Research Analysts	496	3.01%
Information Security Analysts, Web Developers, and Computer Network Architects	544	2.82%
Software Developers, Applications	1,697	2.43%
Healthcare Practitioners and Technical		1.40%
Physician Assistants	945	3.75%
Nurse Practitioners	2,583	3.01%
Speech-Language Pathologists	959	2.71%

The occupations expected to grow the most rapidly within the five major groups are listed. Top growing occupations in healthcare support include phlebotomists and home health aides, and personal care aides and residential advisors in personal care and service. Increases in the population aged 65 and older as well as more individuals with disabilities living in non-institutional settings will support these trends.

In the life, physical, and social scientists group, advances in medical technology and knowledge will be aided by growing numbers of medical scientists and biochemists and biophysicists. Cybersecurity and artificial intelligence challenges will require more information security analysts and operations research analysts. Nurse practitioners will be one of the faster-growing occupations in the healthcare practitioners group as ambulatory care is expanded to new practice locations. It is also one of the occupations expected to add the most new jobs among healthcare practitioners.

Source: TN Dept. of Labor and Workforce Development,
WIR²ED Division, TN Employment Projections 2018-2028

Occupational Groups Expected to Add the Most New Jobs-Top Three Occupations

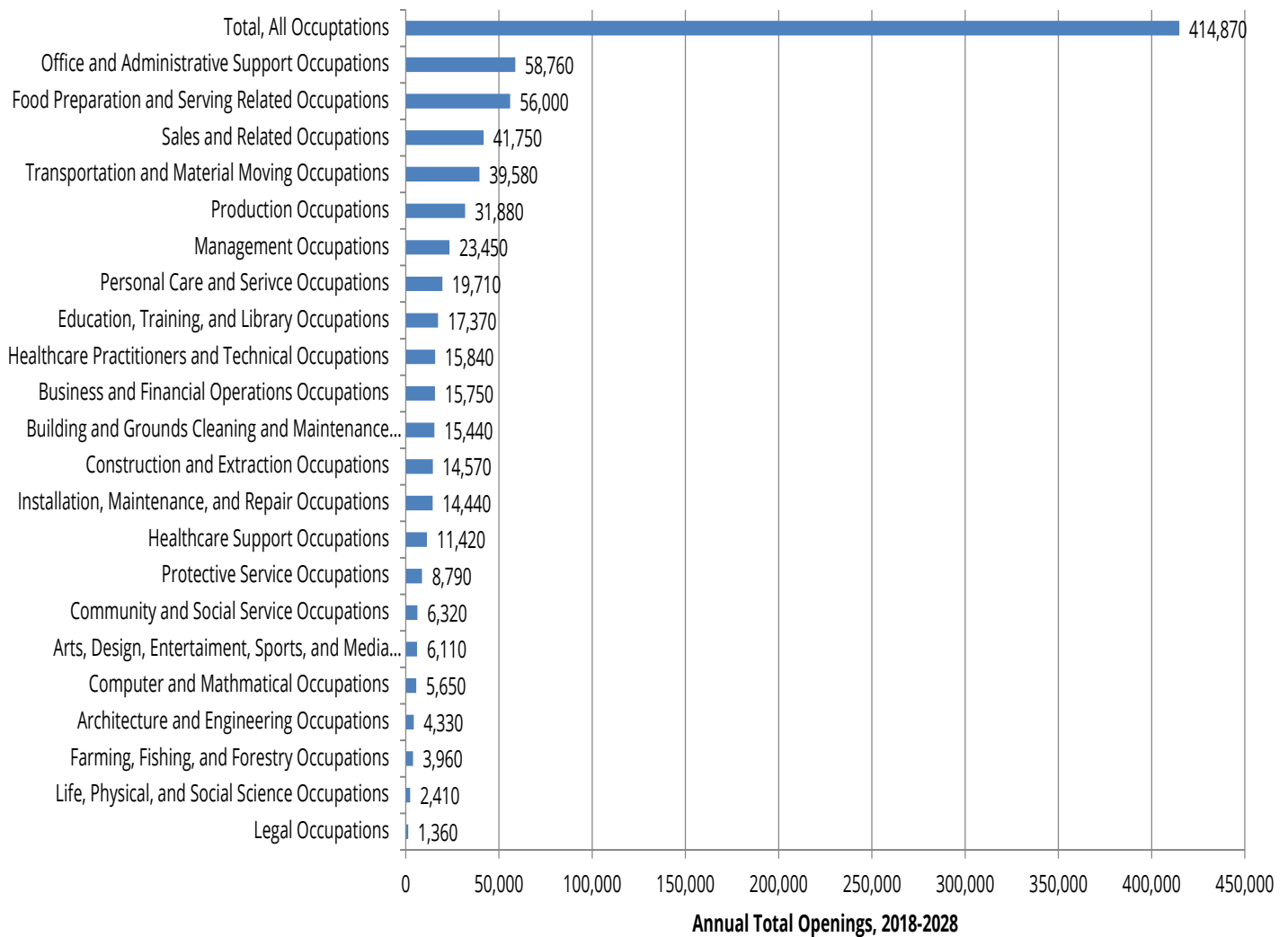
Occupation	Total Employment Change 2018-2028	Annual Avg. % Change 2018-2028
Healthcare Practitioners and Technical	30,530	1.40%
Registered Nurses	7,640	1.16%
Licensed Practical and Licensed Vocational Nurses	3,640	1.34%
Nurse Practitioners	2,580	3.01%
Management	26,770	1.09%
General and Operations Managers	5,210	1.14%
Financial Managers	3,860	2.08%
Food Service Managers	2,550	1.47%
Transportation and Material Moving	16,640	0.55%
Laborers and Freight, Stock, and Material Movers, Hand	6,880	0.69%
Heavy and Tractor-Trailer Truck Drivers	3,840	0.54%
Light Truck or Delivery Services Drivers	1,610	0.77%
Education, Training, and Library	16,000	0.90%
Health Specialties Teachers, Postsecondary	2,480	2.56%
Elementary School Teachers, Except Special Education	1,470	0.51%
Teacher Assistants	15,350	1.03%
Business and Financial Operations	15,350	1.03%
Accountants and Auditors	3,660	1.53%
Market Research Analysts and Marketing Specialists	2,330	2.21%
Human Resources, Training, and Labor Relations Specialists	1,430	1.08%

Listed here are the occupational groups expected to have the most new jobs through 2028 along with the top occupations in each group. Among healthcare practitioners, registered nurses and licensed practical nurses will add thousands of new jobs. Other groups adding most jobs will include the management, transportation and material moving; education, training, and library; and business and financial operations sectors.

In the longer term, financial and food service managers; heavy and light truck drivers; health specialties and elementary school teachers, accountants and auditors, and human resources and training specialists are some of the occupations expected to add the most new jobs.

Source: TN Dept. of Labor and Workforce Development, WIR²ED Division, TN Employment Projections 2018-2028

TN Occupational Groups by Annual Total Openings, 2018-2028



Source: TN Dept of Labor & Workforce Development, WIR²ED Division, TN Employment Projections 2018-2028






Figure 15

The total number of job openings annually due to growth, transfers, and exits is forecast to be 414, 870, with more than 90 percent of the jobs created by transfers and exits. The five occupational groups with the largest number of openings are forecast to be:

- Office and administrative support;
- Food preparation and serving;
- Sales and related;
- Transportation and material moving; and
- Production.

Jobs in these categories are some of those most affected by the current pandemic. More than 31, 000 openings are expected in production occupations. In 2019, those jobs paid close to the median wage for all occupations. The smallest number of openings are expected in legal occupations. Some of the production occupations with the most openings will be assemblers and fabricators, metal workers and plastic workers, food processing workers, production supervisors, inspectors and testers, and welders.

Tennessee West Region's Economy | 2019

 Employment	Total Employment 2019: 699,258 2.0% 2018: 685,341 Stronger	New Jobs 2019: 13,917 2018: 10,459 Stronger	MSA Employment 2018-2019 Jackson - 1.02% Memphis - 1.02% Stronger
 Employers	Average Number of Establishments 2019: 33,244 1.6% 2018: 32,719 Stronger	Total Payroll 2019: \$37.1 Billion 2.6% 2018: \$36.2 Billion Stronger	Counties That Increased Employment 2019: 13 2018: 13 Strong
 Wages & Income	Average Annual Wage 2019: \$52,416 2.0% 2018: \$51,392 Stronger	West Median Wage 2019: \$35,641 2.7% 2018: \$34,691 Stronger	Counties That Increased Annual Wages 2019: 16 2018: 20 Challenge
 Labor Force & Demographics	Unemployment Rate 2019: 4.1% -0.2% 2018: 4.3% Stronger	Labor Force 2019: 729,140 1.9% 2018: 715,867 Stronger	Unemployment Rates Youth 2018: 16.7% With Disability, 2018: 14.8% % In Poverty, 2018: 19.9% Stronger
 Job Outlook	Ratio of Unemployed to Job Openings June 2019: 0.88 -0.09% June 2018: 0.96 Stronger	Projected Annual Growth Rate, All Occupations 2016-2026: 0.9% Stronger	Projected Annual Avg. Job Openings 2016-2026: 95,212 Stronger

Workforce and Labor Force Issues in Tennessee's West Region

The population in the West Region in 2019 was estimated at 1,561,499, a decrease of 0.12 percent over 2018. This is a slightly faster rate of decline than the previous year's decline of 0.01 percent. Only the Greater Memphis LWDA increased in population. It added an estimated 1,091 people, while the Southwest LWDA lost an estimated 628 and the Northwest LWDA an estimated 2,124 people. Females were 51.9 percent of the population in the West Region during 2019. The Greater Memphis LWDA had the highest percent of females in the population in 2019 at 52.3 percent, compared to the Southwest LWDA at 51.3 percent and the Northwest LWDA at 51.2 percent.

The labor force participation rate in the West Region was 60.4 percent, just 0.5 percentage points lower than the State's rate of 60.9 percent. The Greater Memphis LWDA had the highest labor force participation rate at 63.6 percent, while the Northwest LWDA had the lowest at 53.2 percent. Average unemployment rates declined in all three LWDA's in the West Region, for a West Region average of 4.1 percent. The Northwest LWDA had the highest unemployment rate at 4.4 percent, 0.3 percentage points above the West Region and 1.0 percentage points above the State's rate of 3.4 percent.

The lowest rate of higher educational attainment (attainment of some college or more for those 25 years of age or older) was in the Northwest LWDA, with a rate of 41.7 percent compared to the West Region's rate of 53.6 percent and the State's rate of 54.6 percent. In the West Region, the greatest percentage of those with a high school degree or more (88.6 percent) were those who identified as white. Those who identified as Hispanic or Latino only had the lowest percentage (56.5 percent).

Poverty rates decreased slightly in the West Region from 20.2 percent in 2017 to 19.9 percent in 2018. The Greater Memphis LWDA had the highest poverty rate at 20.0 percent, just slightly above the West Region and 3.9 percentage points above the State's poverty rate of 16.1 percent. Both the Southwest LWDA and the Northwest LWDA had a poverty rate of 19.7 percent.

The percent of the unemployed with a disability in the West Region was 14.8 percent, 2.4 percentage points higher than the State's percent of the unemployed with a disability of 12.4 percent. The Greater Memphis LWDA had the highest percentage of those unemployed with a disability at 15.0 percent; the Northwest LWDA had the lowest percentage at 14.1 percent. The percent of those not in the labor force with a disability was 33.3 percent in the West Region, lower than the State's 34.1 percent. The Northwest LWDA had the highest percent of those not in the labor force with a disability at 41.9 percent, while the Greater Memphis LWDA had the lowest at 30.3 percent.

West Tennessee Local Workforce Development Areas and Counties	
Southwest Tennessee (LWDA 7)	
Chester	Haywood
Decatur	Henderson
Hardeman	Madison
Hardin	McNairy
Northwest Tennessee (LWDA 8)	
Benton	Henry
Carroll	Lake
Crockett	Obion
Dyer	Weakley
Gibson	
Greater Memphis Tennessee (LWDA 9)	
Fayette	Shelby
Lauderdale	Tipton

Table 10: West Region Labor Force Data

	Southwest LWDA	Northwest LWDA	Greater Memphis LWDA	West Region	State Total
Total Population 2018	249,389	249,331	1,064,440	1,563,160	6,651,089
Total Population 2019	248,761	247,207	1,065,531	1,561,499	6,829,174
Male Population 2019	121,154	120,757	508,551	750,462	3,332,239
Female Population 2019	127,607	126,450	556,980	811,037	3,496,935
Labor Force Participation Rate 2017 (5-Year Estimate)	55.0%	54.0%	64.0%	60.9%	60.9%
Labor Force Participation Rate 2018 (5-Year Estimate)	54.4%	53.2%	63.6%	60.4%	60.9%
Annual Average Unemployment Rate 2018 Percent	4.3%	4.5%	4.2%	4.3%	3.5%
Annual Average Unemployment Rate 2019 Percent	4.1%	4.4%	4.0%	4.1%	3.4%
Educational Attainment 25 Years and Over (2018) Some College Or Higher - Percent	44.0%	41.7%	58.9%	53.6%	54.6%
Poverty Estimate, All Ages, Percent (2018)	19.7%	19.7%	20.0%	19.9%	16.1%
Percentage of Unemployed with a Disability (2018)	14.7%	14.1%	15.0%	14.8%	12.4%
Percent of Those Not in the Labor Force with a Disability (2018)	35.3%	41.9%	30.3%	33.3%	34.1%

Source: U.S. Census, American Community Survey, 2018

Table 11: West Region Educational Attainment by Race, 2018

Educational Attainment	West Region White Only	West Region Black Only	West Region Hispanic or Latino Only	Statewide White Only	Statewide Black Only	Statewide Hispanic or Latino Only
Population 25 years and over	617,935	373,166	37,660	3,641,698	697,227	173,116
High school graduate only	367,716	250,067	16,377	2,191,041	457,713	81,607
Percent high school graduate only	59.51%	67.01%	43.49%	60.17%	65.65%	47.14%
High school graduate or higher	547,632	314,758	21,284	3,194,533	595,489	107,877
Percent high school graduate or higher	88.62%	84.35%	56.52%	87.72%	85.41%	62.31%
Bachelor degree or higher	179,916	64,691	4,907	1,003,492	137,776	26,270
Percent bachelor degree or higher	29.12%	17.34%	13.03%	27.56%	19.76%	15.17%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Youth unemployment for those ages 16 to 24 topped 13 percent in all three LWDA's in the West Region. The Southwest LWDA had the highest youth unemployment rate at 19.6 percent. Greater Memphis LWDA had a youth unemployment rate of 16.6 percent, compared to 13.9 percent in the Northwest; both had a rate lower than the West Region, which was 16.7 percent.

Table 12: West Region Disability Status of Those in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Labor Force	Total Employed	Employed W Disability	Employed W/O Disability	Total Unemployed	Unemployed W Disability	Unemployed W/O Disability
Southwest LWDA	144,829	100,933	93,233	5,389	87,844	7,700	926	6,774
Northwest LWDA	143,035	98,778	92,230	7,278	84,952	6,548	1,199	5,349
Greater Memphis LWDA	647,324	492,388	454,436	22,982	431,454	37,952	4,062	33,890
West Region	935,188	692,099	639,899	35,649	604,250	52,200	6,187	46,013
Tennessee	4,032,296	3,017,707	2,840,526	174,704	2,665,822	177,181	24,835	152,346

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 13: West Region Disability Status of Those Not in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Not In Labor Force	Not in Labor Force W Disability	Not In Labor Force W/O Disability	% W Disability	% W/O Disability
Southwest LWDA	144,829	43,896	15,487	28,409	35.3%	64.7%
Northwest LWDA	143,035	44,257	18,558	25,699	41.9%	58.1%
Greater Memphis LWDA	647,324	154,936	46,989	107,947	30.3%	69.7%
West Region	935,188	243,089	81,034	162,055	33.3%	66.7%
Tennessee	4,032,296	1,014,589	345,629	668,960	34.1%	65.9%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 14: West Region Youth Unemployment, Ages 16-24 in 2018

Area	Labor Force	Unemployment	Rate
Southwest LWDA	15,543	3,049	19.6%
Northwest LWDA	16,192	2,244	13.9%
Greater Memphis LWDA	74,919	12,472	16.6%
West Region	106,654	17,765	16.7%

Source: U.S. Census Bureau, 2014-2018 American Community Survey, 2018, 5-year estimates

Table 15: West Region Annual Average Unemployment Rates, 2018 to 2019

Area	2019 Annual Averages				2018 Annual Averages			
	Labor Force	Employment	Unemployment Number	Unemployment Percent	Labor Force	Employment	Unemployment Number	Unemployment Percent
UNITED STATES	163,539,000	157,538,000	6,001,000	3.7%	162,075,000	155,761,000	6,314,000	3.9%
TENNESSEE	3,344,800	3,231,500	113,300	3.4%	3,254,300	3,139,900	114,400	3.5%
WEST REGION	729,140	699,260	29,880	4.1%	715,870	685,340	30,530	4.3%
Metropolitan Statistical Areas (MSAs)								
Jackson, TN MSA	65,200	62,890	2,310	3.5%	64,110	61,680	2,440	3.8%
Chester County	8,640	8,340	300	3.4%	8,500	8,180	320	3.8%
Crockett County	7,070	6,820	250	3.5%	6,950	6,680	270	3.9%
Madison County	49,490	47,730	1,770	3.6%	48,670	46,820	1,850	3.8%
Memphis, TN-MS-AR MSA	645,030	618,220	26,810	4.2%	634,440	608,010	26,440	4.2%
Fayette County	19,370	18,660	710	3.6%	18,980	18,270	710	3.8%
Shelby County	449,970	431,890	18,080	4.0%	441,690	423,270	18,420	4.2%
Tipton County	28,460	27,360	1,110	3.9%	27,990	26,800	1,190	4.2%
Arkansas Portion	21,420	20,510	910	4.2%	21,200	20,290	910	4.3%
Mississippi Portion	125,810	119,800	6,010	4.8%	124,580	119,370	5,210	4.2%
Micropolitan Statistical Areas (MCSAs)								
Dyersburg (Dyer Co.)	16,600	15,790	810	4.9%	16,190	15,440	750	4.6%
Martin (Weakley Co.)	16,270	15,610	660	4.0%	15,960	15,280	680	4.2%
Paris (Henry Co.)	14,320	13,730	590	4.1%	14,230	13,630	600	4.2%
Union City, TN-KY	14,670	13,940	730	5.0%	14,300	13,580	730	5.1%
Obion Co.	12,620	12,000	620	4.9%	12,270	11,660	610	5.0%
Kentucky Portion (Fulton Co.)	2,060	1,940	120	5.7%	2,030	1,920	120	5.7%

Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

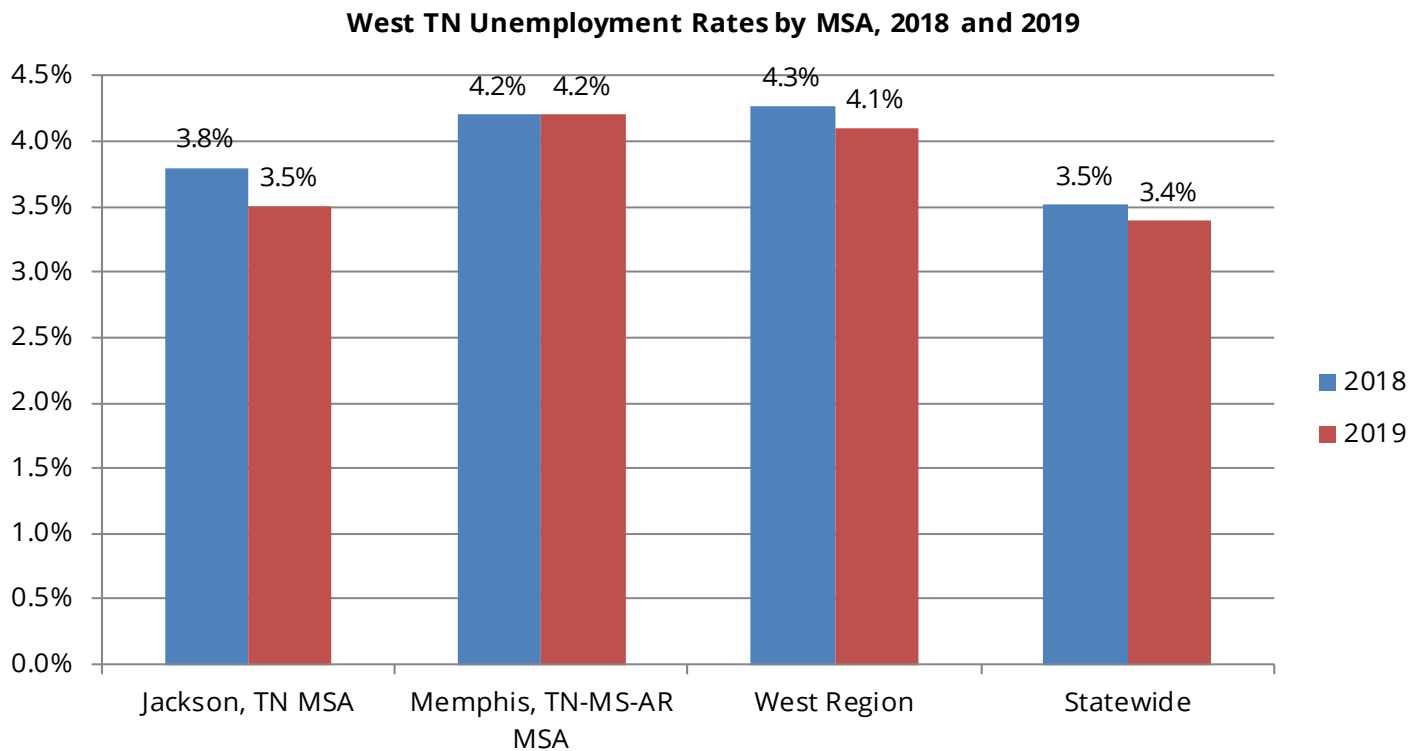
West Region's Unemployment Rates, 2018-2019

In 2019, the average unemployment rate in the West Region was 4.1 percent, which was above the state average of 3.4 percent. Of the two Metropolitan Statistical Areas in the West Region, the Memphis TN-MS-AR MSA had the highest unemployment rate at 4.2 percent in 2019. This was unchanged from the revised 2018 rate of 4.2 percent. The Jackson, TN MSA had an unemployment rate of 3.5 percent in 2019, down from the revised 2018 rate of 3.8 percent.

Four Micropolitan Statistical Areas are in the West Region. Union City, TN-KY (Obion and Fulton County) micropolitan statistical area had the highest unemployment rate at 5.0 percent in 2019, slightly lower than the revised 2018 rate of 5.1 percent. Martin, TN (Weakley County) micropolitan statistical area had the lowest unemployment rate in 2019 at 4.0 percent, lower than the revised 2018 rate of 4.2 percent.

The State of Tennessee creates a monthly report of all unemployment rates by State, Region, County, LWDA, Metropolitan Statistical Area, and Micropolitan Statistical Area called the Labor Force Estimates. This report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-force-estimates.html>

The State of Tennessee also creates a monthly report that provides the nonfarm employment, long-term graphs of the unemployment, and a brief explanation for each major MSA in the Tennessee Labor Market Report. That report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-market-reports.html>



Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

Figure 16

Table 16: West Region - Significant Barriers to Employment

	Southwest LWDA	Northwest LWDA	Greater Memphis LWDA	West Region	State Total
Number of American Indians or Alaskan Natives alone	1,088	1,133	3,825	6,046	32,661
Population Ages 15-19	17,296	16,968	71,647	105,911	424,822
Population Ages 20-24	14,401	14,478	68,263	97,142	406,889
Population Ages 55+	78,506	81,163	273,317	432,986	1,909,264
Number of Veterans 2019	16,502	18,287	60,467	95,256	460,694
Number Below Poverty	47,185	52,587	203,315	303,087	1,046,508
Number With Disability	20,510	26,370	72,305	119,185	534,470
Number of Single Parent Families	22,201	22,171	127,451	171,823	525,144
Probationers and Parolees	3,877	3,425	14,715	22,017	84,299
Community Correction	921	589	707	2,217	6,592
Mental Health Court Statistics (FY 2019)	0	0	80	80	260
Limited English Speaking	415	310	6,771	7,496	39,123
*Foster Care Services - Youth Aged Out	27	25	160	212	876
Clients In Recovery Courts (2019)	166	150	648	964	3,483
In School Youth Experiencing Homelessness in 2019	621	195	1,735	2,551	17,228
TANF 24 Months From Ending Total 2019	118	89	532	739	1,680

* Counties of commitment, not residence.

Source: Population: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates.

Probationers and Parolees, Community Corrections: Dr. Mary Karpos, TN Department of Correction, Community Supervision.

Mental Health Court and Recovery Court Statistics: Rebekah Provost-Emmons, Recovery Court Administrator, Office of Criminal Justice Services, Division of Substance Abuse Services.

Limited English Speaking: U.S. Census Bureau, American Community Survey, 2018.

Foster Care Services: Dave Aguzzi, Office of Independent Living, TN Department of Children's Services.

In School Youth Experiencing Homelessness: Josh Carlson, Data Management Division, TN Department of Education.

TANF 24 Months for Ending Eligibility: Lakecia Peerson, Division of Family Assistance and Child Support, TN Department of Human Services.

The Workforce Innovation and Opportunity Act (WIOA) focuses on individuals with significant barriers to employment, with categories specifically defined in the WIOA guidelines. The above table lists individuals in the West Region and local workforce development areas with significant barriers, based on available data from the sources listed. The largest categories in the West Region were the population aged 55 and above, the number below poverty, and the number of youth ages 16-24. Compared to the other regions, the West Region had the highest percentage of individuals 24 months from exiting TANF. The average number of those unemployed for 27 weeks or more in 2019 statewide (regional data not available) was 16,475. Of those, blacks were 3,850, Hispanic individuals were 950, youth ages 16-19 were 825, and females were 7,500 of the total.

West Region's Economy, 2018-2019

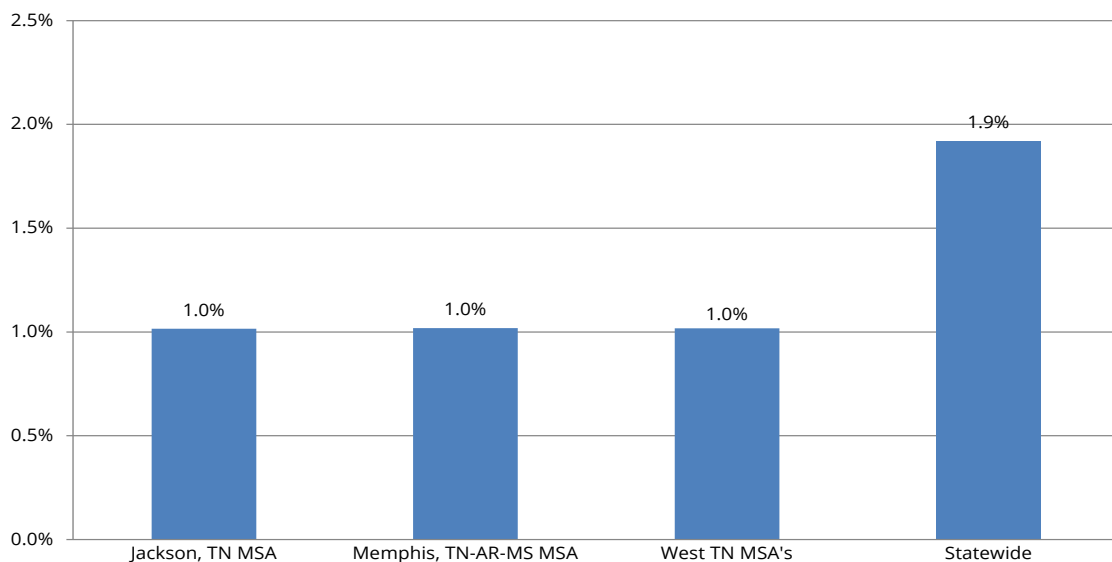
Total employment in the West Region, excluding agriculture and the self-employed, increased from 685,341 to 699,258, an increase of two percent or nearly 14,000 jobs (see West Region Summary page 29). This rate of job growth was similar to that of the state as a whole. Employment in the metropolitan areas of Jackson and Memphis increased by about one percent over the year.

The West Region consists of three Local Workforce Development Areas (LWDAs): Greater Memphis, Southwest, and Northwest, encompassing a total of 21 counties (see list p. 30). Of these, 13 counties increased in employment from 2018 to 2019, the same number as in the previous year. The average number of establishments increased to 33,244 over the year and payroll increased by 2.6 percent to \$37.1 billion. The increase in payroll was about half the rate of increase in the state; still, the payroll total in this region accounts for nearly 1 in every four dollars in the state.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, increased by two percent in 2019 to \$52,416, about 700 dollars more than the state average. The median occupational wage increased by 2.7 percent to \$35,641, just below the state median. With regard to the labor force, the average unemployment rate decreased from 2018 to 2019 to 4.1 percent, about 0.7 percentage points higher than the state average. The labor force increased over the year by nearly two percent, slightly slower than the state. Youth unemployment in 2018 (the latest available) stood at 16.7 percent, compared to the state rate of 12.8 percent; the percent of those in poverty who were unemployed that year was 19.9 percent compared to the state rate of 16.1 percent. Yet in 2019, the number of unemployed compared to the number of job listings on the state job bank, jobs4tn.gov, was less than one unemployed person per job opening.

To summarize: In 2019 compared to 2018, the West Region saw positive growth in employment, although it was slower in the West metropolitan areas than in other areas of the state. Payroll increased, somewhat slower than the rest of the state. The level of the annual average wage and median wage were on par with the state. However, unemployment rates overall and for youth and those in poverty remain higher than state rates. With the number of job openings listed more than the number of unemployed in 2019, it is likely that skill gaps or other barriers existed, preventing the unemployed from filling additional jobs. The forecast for long term projections to 2026 is for an average of 95,210 job openings annually in the West Region.

West TN MSA Job Growth 2018-2019



Source: TN Department of Labor & Workforce Development, Current Employment Statistics

Figure 17

Distressed Counties Distressed counties rank among the 10 percent most economically distressed counties in the nation. Each year, the Appalachian Regional Commission (ARC) prepares an index of county economic status for every county in the United States. Economic status designations are identified through a composite measure of each county’s three-year average unemployment rate, per capita market income, and poverty rate. Based on these indicators, each county is then categorized as distressed, at-risk, transitional, competitive or attainment. Distressed counties in the West Region include Lake County, in Northwest LWDA; Lauderdale County, in Greater Memphis LWDA; and Hardeman County, in Southwest LWDA.

Table 17: West Region Distressed Counties

County	2018 Population	2018 Per Capita Income	2018 Poverty Rate	Employment, Q4 2019	Unemployment Rate, 2019
Hardeman	25,562	\$18,586	20.8%	6,884	5.0%
Lake	7,526	\$11,070	26.9%	1,619	5.7%
Lauderdale	26,297	\$18,777	22.3%	6,879	5.4%

Source: Transparent Tennessee, tn.gov

West Region May 2019 Occupational Employment

The transportation and material moving occupational group was the largest in the West Region in May 2019, according to the annual Occupational Employment Survey, which provides data on all industries except agriculture, the self-employed, and a few not covered by Tennessee’s unemployment insurance system. Employment was nearly 15 percent of total employment in the region and exceeded 100,000 workers, with average entry level wages about at the level of all occupations in the Region (\$21,355). Salaries of experienced workers in the group averaged \$43,022.

Other employees with greater than five percent of occupational employment in the Region included:

- Office and Administrative Support workers- 97,320 (13.6%)
- Sales and Related workers- 63,680 (8.9%)
- Food Preparation and Serving workers- 58,570 (8.2%)
- Production workers -58,500 (8.2%)
- Healthcare Practitioners and Technical workers -50,240 (7%)
- Management workers-40,660 (5.7%)
- Education, Training, and Library workers- 38,650 (5.4%)

Compared to state occupational employment, the West Region has a greater percentage of transportation and material moving employees (15 percent vs. 11.3 percent) and smaller percentages of food preparation and serving and sales and related employees and a slightly smaller proportion of production employees (8.2 v. 8.9 percent). How different are the salaries for the employees in these occupational groups in the West Region compared to the state? For the top occupational groups listed above, West Region median salaries are within 98 to 103 percent of state median salaries- that is, very close. The only notable differences in median salaries by occupational group compared to the state are somewhat lower salaries in the West Region for architecture and engineering, computer and mathematical, and legal occupations.

Table 18: Occupational Employment and Wage Rates (OES) for All Major Groups in the West Region in 2019

Occupation	Occupation Code	Employment	Entry Level Salary	Median Salary	Experienced Salary
Total All Occupations	000000	716,040	\$21,355	\$35,641	\$56,830
Architecture and Engineering	170000	8,840	\$42,288	\$67,450	\$84,942
Arts, Design, Entertainment, Sports, and Media	270000	5,730	\$21,460	\$38,648	\$56,837
Building and Grounds Cleaning and Maintenance	370000	19,420	\$18,559	\$24,200	\$31,204
Business and Financial Operations	130000	25,650	\$36,684	\$58,509	\$78,264
Community and Social Services	210000	8,590	\$27,659	\$41,601	\$52,872
Computer and Mathematical	150000	10,730	\$41,403	\$67,510	\$87,230
Construction and Extraction	470000	22,050	\$27,761	\$38,796	\$49,304
Education, Training, and Library	250000	38,650	\$27,798	\$49,320	\$63,778
Farming, Fishing, and Forestry	450000	1,780	\$20,598	\$28,067	\$37,141
Food Preparation and Serving Related	350000	58,570	\$17,574	\$19,741	\$24,341
Healthcare Practitioners and Technical	290000	50,240	\$36,530	\$58,157	\$87,044
Installation, Maintenance, and Repair	490000	28,320	\$28,904	\$43,271	\$55,372
Legal	230000	3,180	\$32,966	\$62,609	\$105,206
Life, Physical, and Social Science	190000	4,640	\$35,234	\$58,582	\$79,464
Management	110000	40,660	\$47,754	\$85,210	\$127,848
Office and Administrative Support	430000	97,320	\$24,300	\$35,368	\$45,269
Personal Care and Service	390000	13,390	\$17,593	\$22,213	\$30,479
Production	510000	58,500	\$23,235	\$34,174	\$43,654
Protective Service	330000	23,110	\$21,520	\$34,174	\$48,680
Sales and Related	410000	63,680	\$18,863	\$26,055	\$49,837
Transportation and Material Moving	530000	106,920	\$21,484	\$31,432	\$43,022

Source: TN Dept of Labor & Workforce Dev, Div Emp Sec, LMI

The median wage is estimated 50th percentile: 50 percent of workers in occupations earn less than the median wage, and 50 percent earn more than the median wage. Entry level and Experienced wage rates represent the means of the lower 1/3 and upper 2/3 of the wage distribution, respectively. Data is from an annual survey.

Targeted Industries and Occupations in the West Region

Several ways to target industries to determine related workforce needs include looking at mature industries; those with high location quotients compared with the state; and examining which industries have greater potential for growth. Mature industries can be defined as those with high regional or LWDA employment which are still growing, although their rates of growth may not be as high as the average for all industries or of emerging industries. Industries with a high location quotient are those more specialized in the area; those which have a higher ratio of area industry employment to area total employment than the state ratio of that industry's employment to total state employment. A third important comparison is looking at industries expected to grow the most rapidly in the area.¹

Mature industries The largest industries (more than 500 employment) with positive growth rates and which appear in all three of the LWDA's in the West Region included the following:

- Restaurants and Other Eating and Drinking Places (7225), with average employment of 48,800 across the region;
- Employment Services (5613), with 32,500 employment;
- Offices of Physicians (6211), with 14,500 employment;
- Grocery Stores (4451), with 10,360 employment; and
- Building Equipment Contractors (2382), 9,900 employment.

Although significant employment was found in these industries across the region, industry growth rates varied. Building equipment contractors and grocery stores had similar growth rates across the region (1.4 and .9 annual growth respectively); however, employment services and offices of physicians were expected to grow more rapidly in Greater Memphis and restaurants faster in Northwest. The demand for skilled labor is more likely to be found at offices of physicians and building equipment contractors.

Mature industries found in two of the three LWDA's include general freight trucking (NAICS code 4841) with 12,100 employment, general medical and surgical hospitals (6221) with 32,300 employment, and local government, excluding education and hospitals (9993) with 10,900 employment. Eighty-eight percent of the employment in general medical and surgical hospitals was in Greater Memphis, as is 80 percent of employment in general freight trucking. Generally, employment is growing faster in areas outside of the Greater Memphis metropolitan area. All three of these larger industries are likely to have continuous skilled workforce needs especially to replace workers exiting or transferring to new jobs.

Some of the larger mature industries found in only one LWDA in the West Tennessee Region include animal slaughtering and processing (3116) in Northwest with 1,400 employment, and colleges, universities and professional schools in Southwest with 1,500 employment. In the Greater Memphis area, large mature industries include couriers (4921) (27,000 employment); investigation and security services (7,700 employment); and religious organizations (8131) with 8,600 employment.

Regional Location Quotients Industries with high location quotients differed significantly from LWDA to LWDA in the West Region, clustering within the LWDA's rather than across the region. An industry with a location quotient higher than 1.2 can be considered an export industry. Greater Memphis industries with high location quotients tend to be in the service-providing rather than goods producing industries. One set of industries relates to transportation: freight transportation arrangement, other transit and ground passenger arrangement, and support activities for air transportation. Management, scientific, and technical consulting services also has a location quotient greater than 1.2. The only manufacturing industry with a high location quotient in Memphis is medical equipment and supplies manufacturing (LQ of 4.2), with employment in 2016 of just over 6,400.

¹ Source: Tennessee Department of Labor and Workforce Development, Tennessee Workforce Development Areas, Long Term Projections 2016-2026, jobs4tn.gov.

On the other hand, industries with high location quotients in the Northwest are primarily in the goods producing industries. These include animal and crop production, related agricultural support industries, and in manufacturing, animal slaughtering and processing and food manufacturing. Other manufacturing industries include wood product and machinery manufacturing. Similarly, crop production and their support activities are high value employers in the Southwest LWDA. Manufacturing activities with high location quotients here are primarily in durable goods manufacturing.

Table 19: West Region LWDA Rapidly Growing Occupations

LWDA	Occupation Title	Percent Change	Annual Total Openings	Educ. Level
Northwest	Home Health Aides	199.22%	110	HS
Northwest	Personal Care Aides	133.74%	150	HS
Greater Memphis	Helpers--Production Workers	96.48%	1,540	HS
Northwest	Physical Therapist Assistants	71.82%	30	AS
Greater Memphis	Residential Advisors	69.72%	570	HS
Northwest	Residential Advisors	54.50%	100	HS
Greater Memphis	Software Developers, Applications	53.99%	90	BA
Northwest	Nursing Assistants	51.33%	230	PS
Northwest	Medical and Health Services Managers	44.95%	40	BA
Greater Memphis	Education Administrators, Preschool and Childcare Center/Program	44.55%	30	BA
Greater Memphis	Production Workers, All Other	43.60%	170	HS
Greater Memphis	Vocational Education Teachers, Postsecondary	42.54%	40	BA
Greater Memphis	Software Developers, System Software	41.65%	60	BA
Southwest	Home Health Aides	41.19%	70	HS
Greater Memphis	Substance Abuse and Behavioral Disorder Counselors	39.27%	110	N/A

Source: TN Dept of Labor & Workforce Devel. WIR²ED Division, LWDA Projections 2016-26. Rapidly growing occupations with at least 30 openings, high school or greater education. Educ. Level: HS high school; PS postsecondary non-degree award; As associate's degree; BA bachelor's degree; MA master's degree

truck driver. Occupations appearing in two LWDA's which require more than a high school education include general and operations managers (in Southwest and Greater Memphis) and licensed practical nurse (LPNs) (in Southwest and Northwest). LPNs also have a high location quotient in these two LWDA's. Another occupation appearing in two LWDA's (Southwest and Northwest) as a mature occupation with a high location quotient is team assemblers, reflecting the important position of the manufacturing industries in these LWDA's. The training for this occupation is not defined because it depends on the industry in which the workers are employed.

Two occupations appearing as mature occupations in only one LWDA which also have high location quotients include farmers (Northwest) and registered nurses (Southwest). Farmers usually require a high school education and registered nurses an associate's or bachelor's degree.

More Rapid Growth Rates In the longer term, most industries expected to grow the most rapidly in the West Region are in the service-providing industries, with the exception of construction. Building equipment contractors are expected to be among the higher growth industries in the Northwest LWDA. Among the higher growth industries in the Region in the transportation and warehousing industries are general freight trucking (Southwest LWDA), and other transit and ground passenger transportation and warehousing and storage (Greater Memphis). [Include information on employment size] [chart with fast growing industries with > 1000 employment?][those expected to create the most new jobs?] Industries related to healthcare and social assistance including outpatient care centers, home health care services, residential intellectual and developmental disability, mental health, and substance abuse facilities as well as child and family services and child day care centers are expected in the long run to grow more rapidly than average.

Mature Occupations These occupations are the largest in the LWDA's which have a positive growth rate. The only occupation in the list appearing in all three LWDA's which requires education beyond high school is heavy and tractor-trailer

Occupations with High Location Quotients Greater Memphis's specialization in transportation services can be seen in some of the top occupations with high location quotients: cargo and freight agents, couriers and messengers; weighers, measurers, and checkers, recordkeeping; and other transportation workers. The usual required education level for these occupations is high school or the equivalent. Other top occupations more unique to Greater Memphis and which require higher levels of education include those working in the federal government (tax collectors and revenue agents) and the public and private health services and health education industries (internists, pediatricians, and health specialties teachers). Other top occupations requiring education beyond a high school degree include food scientists and technologists and biological technicians, trained at the bachelor's degree level or beyond.






Occupations with high location quotients in the Northwest LWDA are several related to key industry clusters. Related to agriculture are farmers and agricultural managers as well as farmworkers and laborers and farm equipment mechanics. Only agricultural inspectors and forest and conservation technicians require education beyond high school (bachelor's and associate degrees, respectively). A cluster of occupations related to manufacturing such as coil winders and mixing and blending machine operators are also important, and require a high school degree.

The Southwest has a cluster of occupations related to rehabilitation services, include counselors, healthcare social workers, mental health and substance abuse workers, and therapy assistants. The therapy assistants require associate degrees; the counselors, social workers, and mental health and related workers require master's degrees. Southwest's specialization in wood products manufacturing requires logging equipment operators and sawing machine operators. The largest occupation in the manufacturing industries with a high location quotient here is machinists, with more than 600 employees expected in this occupation by 2026.

More Rapidly Growing Occupations The only top rapidly-growing occupation found in all three LWDA's is home health aide, expected to have nearly 2,800 jobs by 2026 across the three LWDA's. The education level is high school or the equivalent. Other rapidly growing occupations in two LWDA's, which require education beyond high school, include physician assistants (master's degree, GM,SW), occupational therapy assistants (associate's degree, SW,NW), and physical therapy assistants (associate's degree, SW,NW). Other rapidly-growing occupations in the personal care field include personal care aides (SW,NW) and residential advisors (NW,GM) which require a high school education only. Another faster-growing health care occupation in the Southwest LWDA requiring less than a bachelor's degree is expected to be respiratory therapists. More than 900 substance abuse and behavioral health counselors are forecast to be employed in Greater Memphis by 2026. More than 1,800 nursing assistants (postsecondary non-degree award) expect to be employed in Northwest.

Another occupational area expected to be growing rapidly in Greater Memphis is computer and mathematical occupations, especially software developers, applications (1,100 employees) and software developers, systems (740 employees), both of which usually require bachelor's degrees.

Tennessee Middle Region's Economy | 2019

 <p>Employment</p>	<p>Total Employment</p> <p>2019: 1,430,774 3.7% 2018: 1,379,478 Stronger</p>	<p>New Jobs</p> <p>2019: 51,296 2018: 45,930 Stronger</p>	<p>MSA Employment 2018-2019</p> <p>Clarksville - 1.75% Nashville - 3.27%</p> <p>Stronger</p>
 <p>Employers</p>	<p>Average Number of Establishments</p> <p>2019: 70,057 4.3% 2018: 67,167 Stronger</p>	<p>Total Payroll</p> <p>2019: \$67.9 Billion 5.8% 2018: \$64.1 Billion Stronger</p>	<p>Counties That Increased Employment</p> <p>2019: 24 2018: 26 Challenge</p>
 <p>Wages & Income</p>	<p>Average Annual Wage</p> <p>2019: \$53,798 2.9% 2018: \$52,259 Stronger</p>	<p>Middle Median Wage</p> <p>2019: \$37,405 3.1% 2018: \$36,292 Stronger</p>	<p>Counties That Increased Annual Wages</p> <p>2019: 34 2018: 32 Stronger</p>
 <p>Labor Force & Demographics</p>	<p>Unemployment Rate</p> <p>2019: 2.9% -0.2% 2018: 3.1% Stronger</p>	<p>Labor Force</p> <p>2019: 1,474,065 3.6% 2018: 1,422,876 Stronger</p>	<p>Unemployment Rates</p> <p>Youth 2018: 12.8% With Disability, 2018: 10.3% % In Poverty, 2018: 14.0%</p> <p>Stronger</p>
 <p>Job Outlook</p>	<p>Ratio of Unemployed to Job Openings</p> <p>June 2019: 0.55 -0.04% June 2018: 0.79 Stronger</p>	<p>Projected Annual Growth Rate, All Occupations</p> <p>2016-2026: 1.6% Stronger</p>	<p>Projected Annual Avg. Job Openings</p> <p>2016-2026: 176,790 Stronger</p>

Workforce and Labor Force Issues in Tennessee's Middle Region

Population in the Middle Region in 2019 was estimated at 2,844,241, an increase of 4.7 percent over 2018. This is a faster rate of growth than the previous year's rate of 1.58 percent. All three LWDA's in the Middle Region increased in population. Northern Middle LWDA added 99,039, Southern Middle LWDA added 16,880, and Upper Cumberland LWDA added 11,678 people. Females were 51.0 percent of the population in the Middle Region during 2019. Northern Middle LWDA had the highest percent of females in the population (51.1 percent) compared to Southern Middle LWDA at 50.7 percent and the Upper Cumberland LWDA at 50.6 percent.

The labor force participation rate in the Middle Region was 63.9 percent, which is 3.0 percentage points higher than the State's rate of 60.9 percent. Northern Middle LWDA had the highest labor force participation rate at 67.4 percent, while Upper Cumberland had the lowest at 53.3 percent. Average unemployment rates remained relatively the same in most of the three LWDA's in the Middle Region, for a Middle Region average of 2.9 percent. The Upper Cumberland LWDA had the highest unemployment rate at 3.9 percent, 0.8 percentage points above the Middle Region and 0.5 percentage points above the State's rate of 3.4 percent.

The lowest rate of higher educational attainment (attainment of some college or more for those 25 years of age or older) is in the Upper Cumberland LWDA, with a rate of 40.2 percent compared to the Middle Region's rate of 57.3 percent and the State's rate of 54.6 percent. In the Middle Region, the greatest percentage of those with a high school degree or more (88.67) were those who identified as white. Those who identified as Hispanic or Latino only had the lowest percent at 66.1.

Poverty rates decreased in the Middle Region from 14.3 percent in 2017 to 14.0 percent in 2018. The Upper Cumberland LWDA had the highest poverty rate at 18.5 percent, which is above the Middle Region and 2.4 percentage points above the State's poverty rate of 16.1 percent. Northern Middle had the lowest poverty rate at 12.7 percent.

The percent of the unemployed with a disability in the Middle Region was 10.3 percent, 2.1 percentage points lower than the State's percent of the unemployed with a disability of 12.4 percent. The Southern Middle LWDA had the highest percentage at 12.9 percent; the Northern Middle LWDA had the lowest percentage at 9.4 percent. The percent of those not in the labor force with a disability was at 31.8 percent in the Middle Region, lower than the State's 34.1 percent. The Southern Middle LWDA had the highest percent of those not in the labor with a disability at 39.0 percent, while the Northern Middle LWDA had the lowest at 28.1 percent.

Youth unemployment for those ages 16 to 24 topped 10 percent in all three LWDA's in the Middle Region. The Upper Cumberland LWDA had the highest youth unemployment rate at 14.8 percent compared to Southern Middle LWDA at 12.8 percent and the Northern Middle LWDA at 10.5 percent. The total youth unemployment rate for the Middle Region was 11.3 percent.

Middle Tennessee Local Workforce Development Areas and Counties	
Upper Cumberland Tennessee (LWDA 3)	
Cannon	Overton
Clay	Pickett
Cumberland	Putnam
DeKalb	Smith
Fentress	Van Buren
Jackson	Warren
Macon	White
Southern Middle Tennessee (LWDA 5)	
Bedford	Lincoln
Coffee	Marshall
Franklin	Maury
Giles	Moore
Hickman	Perry
Lawrence	Wayne
Lewis	
Northern Middle Tennessee (LWDA 6)	
Cheatham	Rutherford
Davidson	Stewart
Dickson	Sumner
Houston	Toursdale
Humphreys	Williamson
Montgomery	Wilson
Robertson	

Table 20: Middle Region Labor Force Data

	Upper Cumberland LWDA	Southern Middle LWDA	Northern Middle LWDA	Middle Region	State Total
Total Population 2018	348,721	438,978	1,928,945	2,716,644	6,651,089
Total Population 2019	360,399	455,858	2,027,984	2,844,241	6,829,174
Male Population 2019	178,112	224,797	992,146	1,395,055	3,332,239
Female Population 2019	182,287	231,061	1,035,838	1,449,186	3,496,935
Labor Force Participation Rate 2017 (5-Year Estimate)	53.1%	57.4%	66.9%	63.5%	60.9%
Labor Force Participation Rate 2018 (5-Year Estimate)	53.3%	57.3%	67.4%	63.9%	60.9%
Annual Average Unemployment Rate 2018 Percent	3.9%	3.5%	2.8%	3.1%	3.5%
Annual Average Unemployment Rate 2019 Percent	3.9%	3.5%	2.7%	2.9%	3.4%
Educational Attainment 25 Years and Over (2018) Some College Or Higher - Percent	40.2%	44.3%	63.6%	57.3%	54.6%
Poverty Estimate, All Ages, Percent (2018)	18.5%	15.5%	12.7%	14.0%	16.1%
Percentage of Unemployed with a Disability (2018)	12.4%	12.9%	9.4%	10.3%	12.4%
Percent of Those Not in the Labor Force with a Disability (2018)	38.6%	39.0%	28.1%	31.8%	34.1%

Source: U.S. Census, American Community Survey, 2018

Table 21: Middle Region Educational Attainment by Race, 2018

Educational Attainment	Middle Region White Only	Middle Region Black Only	Middle Region Hispanic or Latino Only	Statewide White Only	Statewide Black Only	Statewide Hispanic or Latino Only
Population 25 years and over	1,527,939	230,328	89,410	3,641,698	697,227	173,116
High school graduate only	893,398	143,689	44,726	2,191,041	457,713	81,607
Percent high school graduate only	58.47%	62.38%	50.02%	60.17%	65.65%	47.14%
High school graduate or higher	1,354,842	201,485	59,114	3,194,533	595,489	107,877
Percent high school graduate or higher	88.67%	87.48%	66.12%	87.72%	85.41%	62.31%
Bachelor degree or higher	461,444	57,796	14,388	1,003,492	137,776	26,270
Percent bachelor degree or higher	30.20%	25.09%	16.09%	27.56%	19.76%	15.17%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 22: Middle Region Disability Status of Those in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Labor Force	Total Employed	Employed W Disability	Employed W/O Disability	Total Unemployed	Unemployed W Disability	Unemployed W/O Disability
Upper Cumberland LWDA	202,081	139,853	131,551	8,814	122,737	8,302	1,252	7,050
Southern Middle LWDA	256,843	186,533	176,133	11,788	164,345	10,400	1,746	8,654
Northern Middle LWDA	1,211,763	962,714	918,526	53,091	865,435	44,188	5,498	38,690
Middle Region	1,670,687	1,289,100	1,226,210	73,693	1,152,517	62,890	8,496	54,394
Tennessee	4,032,296	3,017,707	2,840,526	174,704	2,665,822	177,181	24,835	152,346

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 23: Middle Region Disability Status of Those Not in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Not In Labor Force	Not in Labor Force W Disability	Not In Labor Force W/O Disability	% W Disability	% W/O Disability
Upper Cumberland LWDA	202,081	62,228	24,034	38,194	38.6%	61.4%
Southern Middle LWDA	256,843	70,310	27,405	42,905	39.0%	61.0%
Northern Middle LWDA	1,211,763	249,049	70,004	179,045	28.1%	71.9%
Middle Region	1,670,687	381,587	121,443	260,144	31.8%	68.2%
Tennessee	4,032,296	1,014,589	345,629	668,960	34.1%	65.9%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 24: Middle Region Youth Unemployment, Ages 16-24 in 2018

Area	Labor Force	Unemployment	Rate
Upper Cumberland LWDA	22,850	3,393	14.8%
Southern Middle LWDA	27,545	3,534	12.8%
Northern Middle LWDA	154,508	16,280	10.5%
Middle Region	204,903	23,207	11.3%

Source: U.S. Census Bureau, 2014-2018 American Community Survey, 2018, 5-year estimates

Table 25: Middle Region Annual Average Unemployment Rates, 2018 to 2019

Area	2019 Annual Averages				2018 Annual Averages			
	Labor Force	Employment	Unem- ployment Number	Unem- ployment Percent	Labor Force	Employment	Unem- ployment Number	Unem- ployment Percent
UNITED STATES	163,539,000	157,538,000	6,001,000	3.7%	162,075,000	155,761,000	6,314,000	3.9%
TENNESSEE	3,344,800	3,231,500	113,300	3.4%	3,254,300	3,139,900	114,400	3.5%
MIDDLE REGION	1,474,070	1,430,770	43,290	2.9%	1,422,880	1,379,780	43,400	3.1%
Metropolitan Statistical Areas (MSAs)								
Clarksville, TN-KY MSA	117,330	112,370	4,960	4.2%	114,490	109,620	4,870	4.3%
Montgomery County	86,220	82,950	3,280	3.8%	84,010	80,750	3,260	3.9%
Kentucky Portion	31,110	29,420	1,690	5.4%	30,480	28,880	1,610	5.3%
Nashville-Mur- freesboro, TN MSA	1,091,370	1,062,790	28,580	2.6%	1,048,820	1,019,930	28,890	2.8%
Cannon County	6,690	6,480	210	3.1%	6,420	6,220	200	3.2%
Cheatham County	22,190	21,610	580	2.6%	21,330	20,740	590	2.8%
Davidson County	409,810	399,500	10,310	2.5%	393,920	383,410	10,510	2.7%
Dickson County	27,410	26,600	820	3.0%	26,320	25,520	800	3.1%
Hickman County	11,600	11,240	360	3.1%	11,160	10,790	360	3.3%
Macon County	11,440	11,080	360	3.1%	10,980	10,630	350	3.2%
Maury County	50,160	48,580	1,580	3.2%	48,180	46,610	1,570	3.2%
Robertson County	38,550	37,440	1,110	2.9%	37,010	35,920	1,180	3.2%
Rutherford County	186,700	181,900	4,790	2.6%	179,400	174,550	4,860	2.7%
Smith County	9,590	9,300	290	3.0%	9,210	8,930	280	3.1%
Sumner County	103,810	101,030	2,780	2.7%	99,760	96,970	2,790	2.8%
Trousdale County	5,500	5,340	170	3.1%	5,290	5,120	170	3.3%
Williamson County	130,220	127,060	3,160	2.4%	125,090	121,950	3,130	2.5%
Wilson County	77,730	75,640	2,090	2.7%	74,670	72,580	2,090	2.8%
Micropolitan Statistical Areas (MCSAs)								
Cookeville	50,080	48,260	1,830	3.6%	48,810	46,990	1,830	3.7%
Jackson Co.	4,700	4,490	220	4.6%	4,600	4,380	220	4.7%
Overton Co.	10,030	9,650	380	3.8%	9,790	9,420	370	3.8%
Putnam Co.	35,360	34,120	1,230	3.5%	34,420	33,180	1,240	3.6%
Crossville (Cumber- land Co.)	23,690	22,620	1,060	4.5%	23,320	22,300	1,030	4.4%
Lawrenceburg (Law- rence Co.)	19,430	18,640	790	4.1%	18,460	17,710	750	4.0%
Lewisburg (Marshall Co.)	15,860	15,310	560	3.5%	15,450	14,910	540	3.5%
Shelbyville (Bedford Co.)	21,220	20,440	790	3.7%	20,780	19,970	780	3.8%
Tullahoma-Manches- ter	49,730	48,080	1,640	3.3%	48,140	46,470	1,490	3.1%
Coffee Co.	25,750	24,890	860	3.3%	24,780	23,900	680	3.3%
Franklin Co.	20,340	19,670	680	3.3%	19,860	19,190	760	3.8%
Moore Co.	3,640	3,530	110	2.9%	3,500	3,390	110	3.1%

Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

Middle Region's Unemployment Rates, 2018-2019

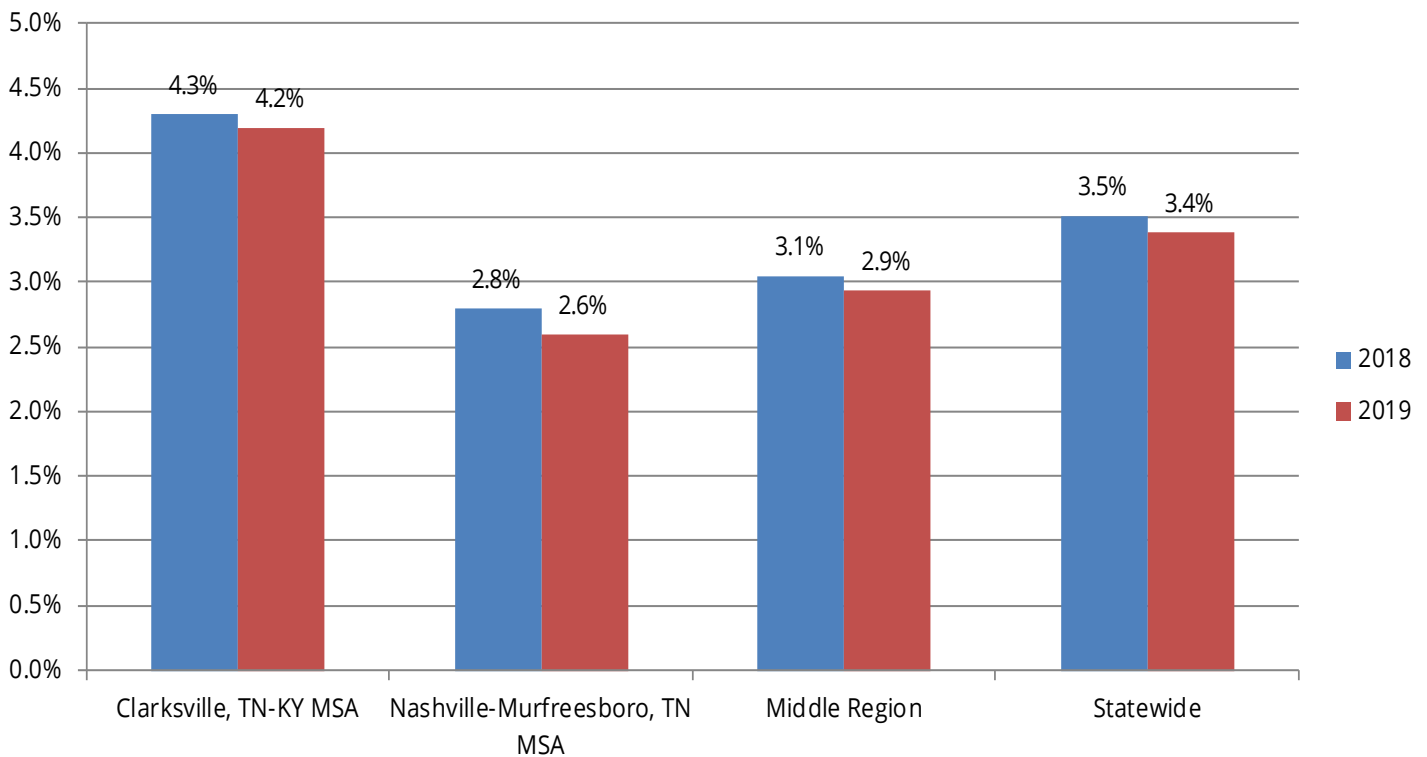
In 2019, the average unemployment rate in the Middle Region was 2.9 percent, which was below the state average of 3.4 percent. Of the two Metropolitan Statistical Areas in the Middle Region, the Clarksville TN-KY MSA had the highest unemployment rate at 4.2 percent in 2019. This was slightly lower than the revised 2018 rate of 4.3 percent. The Nashville, TN MSA had an unemployment rate of 2.6 percent in 2019, down from the revised 2018 rate of 2.8 percent.

Six Micropolitan Statistical Areas are in the Middle Region. Crossville, TN (Cumberland County) micropolitan statistical area had the highest unemployment rate at 4.5 percent in 2019, slightly higher than the revised 2018 rate of 4.4 percent. Tullahoma-Manchester, TN (Coffee County, Franklin County, and Moore County) micropolitan statistical area had the lowest unemployment rate in 2019 at 3.3 percent, higher than the revised 2018 rate of 3.1 percent.

The State of Tennessee creates a monthly report of all unemployment rates by State, Region, County, LWDA, Metropolitan Statistical Area, and Micropolitan Statistical Area called the Labor Force Estimates. This report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-force-estimates.html>

The State of Tennessee also creates a monthly report that provides the nonfarm employment, long-term graphs of the unemployment, and a brief explanation for each major MSA in the Tennessee Labor Market Report. That report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-market-reports.html>

Middle TN Unemployment Rates by MSA, 2018 and 2019



Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

Figure 18

Table 26: Middle Region - Significant Barriers to Employment

	Upper Cumberland LWDA	Southern Middle LWDA	Northern Middle LWDA	Middle Region	State Total
Number of American Indians or Alaskan Natives alone	2,034	2,766	10,180	14,980	32,661
Population Ages 15-19	21,627	27,315	123,820	172,762	424,822
Population Ages 20-24	20,459	23,169	124,382	168,010	406,889
Population Ages 55+	118,133	135,667	462,065	715,865	1,909,264
Number of Veterans 2019	25,415	31,393	136,227	193,035	460,694
Number Below Poverty	63,003	66,240	235,001	364,244	1,046,508
Number With Disability	35,955	41,491	126,297	203,743	534,470
Number of Single Parent Families	23,851	32,663	139,712	196,226	525,144
Probationers and Parolees	4,977	5,910	22,722	33,609	84,299
Community Correction	376	612	1,493	2,481	6,592
Mental Health Court Statistics (FY 2019)	0	0	53	53	260
Limited English Speaking	1,213	1,481	18,961	21,655	39,123
*Foster Care Services - Youth Aged Out	79	68	192	339	876
Clients In Recovery Courts (2019)	298	291	1,003	1,592	3,483
In School Youth Experiencing Homelessness in 2019	1,129	70	8,016	9,215	17,228
TANF 24 Months From Ending Total 2019	54	69	293	416	1,680

* Counties of commitment, not residence.

Source: Population: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates.

Probationers and Parolees, Community Corrections: Dr. Mary Karpos, TN Department of Correction, Community Supervision.

Mental Health Court and Recovery Court Statistics: Rebekah Provost-Emmons, Recovery Court Administrator, Office of Criminal Justice Services, Division of Substance Abuse Services.

Limited English Speaking: U.S. Census Bureau, American Community Survey, 2018.

Foster Care Services: Dave Aguzzi, Office of Independent Living, TN Department of Children's Services.

In School Youth Experiencing Homelessness: Josh Carlson, Data Management Division, TN Department of Education.

TANF 24 Months for Ending Eligibility: Lakecia Peerson, Division of Family Assistance and Child Support, TN Department of Human Services.

The Workforce Innovation and Opportunity Act (WIOA) focuses on individuals with significant barriers to employment, with categories specifically defined in the WIOA guidelines. The above table lists individuals in the Middle Region and local workforce development areas with significant barriers, based on available data from the sources listed. The largest categories in the Middle Region were the population aged 55 and above, the number below poverty, and the number of youth aged 16-24. The Middle Region had 46 percent of the state total of American Indians/Alaskan natives, 42 percent of the veterans, 53 percent of the in-school youth experiencing homelessness, and 55 percent of those with limited English speaking ability. The average number of those unemployed for 27 weeks or more in 2019 statewide (regional data not available) was 16,475. Of those, blacks were 3,850, Hispanic individuals were 950, youth ages 16-19 were 825, and females were 7,500 of the total.

Middle Region's Economy, 2018-2019

Total employment in the Middle Region, excluding agriculture and the self-employed, increased from 1,379,478 to 1,430,774, an increase of 3.7 percent or 51,300 jobs (see Middle Region Summary, p. 42). This rate of job growth was almost twice as fast as that of the state as a whole.

The Middle Region contains two Metropolitan Statistical Areas (MSAs), Clarksville TN-KY MSA and Nashville. The Nashville MSA was the second most rapidly growing in the state in employment at 3.27 percent; Clarksville was the third at 1.75 percent for a regional MSA average growth rate of 3.1 percent.

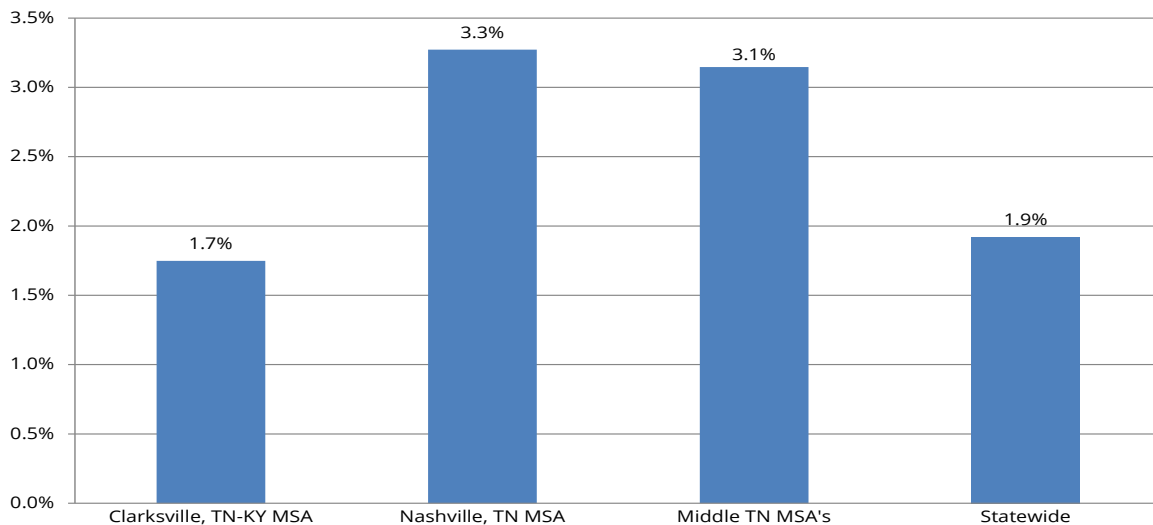
The Middle Region consists of three Local Workforce Development Areas and within them, 40 counties (see list p. 43). Of these, 24 counties increased employment from 2018 to 2019, slightly fewer than in the previous year. The average number of establishments increased by 2,890 over the year and payroll increased by 5.8 percent to \$67.9 billion. Total payroll in this region accounts for nearly four in every ten dollars in the state.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, increased by just over \$1,500 to \$53,798 in 2019, which was \$2,111 over the state average. The median occupational wage increased by 3.1 percent to \$37,405, also above the state average. With regard to the labor force, the average unemployment rate decreased from 2018 to 2019 to 2.9 percent, the lowest of the three regions. The labor force increased over the year by 3.6 percent, leading the regions in labor force growth.

However, youth unemployment in 2018 (the latest available) stood at 12.8 percent, the same rate as the state. The percent of those in poverty who were unemployed that year was 14.0 percent, lower than the state rate. Also, in 2019, the number of unemployed compared to the number of job listings on the state job bank, jobs4tn.gov, was roughly two jobs for each person unemployed.

In summary: In 2019 compared to 2018, the Middle Region saw employment growth almost twice as fast as the state as a whole. The Nashville- Rutherford County MSA had the second most rapid employment growth rate in the state, and the Clarksville MSA the third most rapid. However, only 24 of the 40 counties increased employment. The average annual wage and median wage were higher than the state, and this region had the lowest unemployment rate. However, youth unemployment was at the state rate. The percent of those in poverty who were unemployed was 14 percent, even though on average there were two jobs for each person unemployed. The forecast for long term projections to 2026 is for an average of 176, 790 job openings annually in the Middle Region.

Middle TN MSA Job Growth 2018-2019



Source: TN Department of Labor & Workforce Development, Current Employment Statistics

Figure 19

Distressed Counties Distressed counties rank among the 10 percent most economically distressed counties in the nation. Each year, the Appalachian Regional Commission (ARC) prepares an index of county economic status for every county in the United States. Economic status designations are identified through a composite measure of each county's three-year average unemployment rate, per capita market income, and poverty rate. Based on these indicators, each county is then categorized as distressed, at-risk, transitional, competitive or attainment. Distressed counties in the Middle Region include Clay County, in Upper Cumberland LWDA; Perry County and Wayne County, in Southern Middle LWDA; and there were no distressed counties in Northern Middle LWDA.

Table 27: Middle Region Distressed Counties

County	2018 Population	2018 Per Capita Income	2018 Poverty Rate	Employment, Q4 2019	Unemployment Rate, 2019
Clay	7,686	\$19,327	26.7%	1,348	6.0%
Perry	7,912	\$21,790	30.3%	1,768	5.0%
Wayne	16,649	\$17,785	19.6%	3,817	4.7%

Source: Transparent Tennessee, tn.gov

Middle Region May 2019 Occupational Employment

The office and administrative support occupational group was the largest in the Middle Region in May 2019, according to the annual Occupational Employment Survey, which provides data on all industries except agriculture, the self-employed, and a few not covered by Tennessee's unemployment insurance system. Employment was 14 percent of total employment in the region and exceeded 176,170 workers, with average entry level wages about \$2600 more than the average for all occupations in the Region (\$22,449). Salaries of experienced workers in the group averaged \$46,429.

Other employees with greater than five percent of occupational employment in the Region included:

- Transportation and Material Moving workers- 129, 480 (10.2%)
- Food Preparation and Serving workers- 120,380 (9.5.%)
- Sales and Related workers- 118,830 (9.4%)
- Production workers -106,850 (8.4%)
- Management workers-82,740- (6.6%)
- Healthcare Practitioners and Technical workers -81,490 (6.4%)
- Business and Financial Operations workers- 71,240 (5.6%)
- Education, Training, and Library workers-65,240 (5.2%)

Compared to state occupational employment, the Middle Region has a smaller percentage of transportation and material moving employees (10.2 vs. 11.3 percent) and larger proportions of management (6.6 vs. 6.0 percent) and business and financial operations employees (5.6 vs. 4.5 percent).

How different are the salaries for the employees in these occupational groups in the Middle Region compared to the state? The median annual salary for the Middle Region was 104 percent of the state median pay; that is, about four percent or \$1500 higher per year. Several occupational groups in the Middle Region had higher median salaries than the state, notably sales and related occupations (108 percent), buildings and grounds employees (105 percent) and arts, design, entertainment, sports, and media (111 percent). This last category may be higher due to the professional sports teams and higher-earning entertainers in the Middle Region. The only occupational group with somewhat lower salaries than the state was farming, forestry, and agricultural workers.

Table 28: Occupational Employment and Wage Rates (OES) for All Major Groups in the Middle Region in 2019

Occupation	Occupation Code	Employment	Entry Level Salary	Median Salary	Experienced Salary
Total All Occupations	000000	1,263,760	\$22,449	\$37,405	\$60,318
Architecture and Engineering	170000	16,630	\$43,334	\$68,501	\$87,268
Arts, Design, Entertainment, Sports, and Media	270000	15,920	\$27,523	\$49,014	\$74,752
Building and Grounds Cleaning and Maintenance	370000	30,830	\$19,207	\$25,436	\$32,444
Business and Financial Operations	130000	71,240	\$38,627	\$59,228	\$79,090
Community and Social Services	210000	13,800	\$28,870	\$42,239	\$52,482
Computer and Mathematical	150000	30,260	\$44,732	\$72,766	\$93,811
Construction and Extraction	470000	43,940	\$29,231	\$40,425	\$51,461
Education, Training, and Library	250000	65,240	\$26,200	\$47,842	\$64,022
Farming, Fishing, and Forestry	450000	2,170	\$20,811	\$26,663	\$33,555
Food Preparation and Serving Related	350000	120,380	\$17,599	\$20,155	\$25,892
Healthcare Practitioners and Technical	290000	81,490	\$36,903	\$58,933	\$89,913
Installation, Maintenance, and Repair	490000	51,390	\$28,988	\$42,505	\$54,303
Legal	230000	7,740	\$41,506	\$72,380	\$118,357
Life, Physical, and Social Science	190000	7,880	\$37,474	\$57,183	\$75,421
Management	110000	82,740	\$50,095	\$89,461	\$133,625
Office and Administrative Support	430000	176,170	\$25,096	\$36,375	\$46,429
Personal Care and Service	390000	24,010	\$18,263	\$23,946	\$33,791
Production	510000	106,850	\$25,105	\$35,008	\$44,592
Protective Service	330000	28,630	\$21,939	\$35,423	\$48,807
Sales and Related	410000	118,830	\$20,137	\$28,710	\$51,290
Transportation and Material Moving	530000	129,480	\$21,938	\$31,246	\$40,391

Source: TN Dept of Labor & Workforce Dev, Div Emp Sec, LMI

The median wage is estimated 50th percentile: 50 percent of workers in occupations earn less than the median wage, and 50 percent earn more than the median wage. Entry level and Experienced wage rates represent the means of the lower 1/3 and upper 2/3 of the wage distribution, respectively. Data is from an annual survey.

Targeted Industries and Occupations in the Middle Region

Targeted industries in the Middle Tennessee Region will be examined with regard to mature industries, those with high location quotients, and those expected to grow the most rapidly, and their implications for workforce services.¹

Mature Industries Mature industries, defined as the largest industries in each of the LWDA's which are expected to have positive growth rates through 2026, and appearing in all three LWDA's in the Middle Region include the following:

- Grocery Stores (4451) , with 18,600 employment;
- Offices of Physicians (6211), with 23,250 employment;
- Employment Services (5613), with 39,240 employment; and
- Local Government, excluding Education and Hospitals with 44,300 employment.

More than 75 percent, or three out of every four jobs in the first three industries, are in the Northern Middle LWDA. Two of every three jobs in general local government are also in Northern Middle.

Mature industries with significant employment present in two LWDA's and which employ skilled workers in transportation, education, and health care include:

- General freight trucking (UC,SM), with 3,520 employment;
- Elementary and secondary schools (SM,NM), with 54, 820 employment;
- General, medical, and surgical hospitals (SM,NM), with 46,390 employment; and
- Nursing care facilities (UC, SM), with 5,040 employment.

In addition, industries in the Northern Middle LWDA employing more than 10,000 workers in the important service-providing sectors of education, finance, and professional and business services include:

- Colleges, universities, and professional schools, with 25,680 employment;
- Agencies, Brokerages, and Insurance-Related, with 14,110 employment;
- Accounting and Tax Preparation, with 13,800 employment; and
- Management of Companies and Enterprises, with 20, 340 employment.

In Northern Middle, employment in construction in the building equipment contractors' industry is significant with nearly 13,300 workers.

Regional Location Quotients Industries with high location quotients are primarily clustered within each of the three Middle Region LWDA's, rather than throughout the region. The Upper Cumberland LWDA has strengths in agriculture and forestry-related industries, as well as in manufacturing. Both rubber and wood products manufacturing employ more than 1,000 workers and have location quotients of 3.7 (export industries). The Southern Middle LWDA, besides its strengths in agricultural areas, rank high in transportation equipment manufacturing and related industries' employment, with more than 14,000 workers. [check confidentiality].

The Northern Middle LWDA, the entertainment capital of the region, has its uniqueness defined by its specialization in motion picture sound and video recording, the presence of high numbers of independent artists and managers and promoters of arts, sports, and special events. In support of this, the accounting, tax preparation, bookkeeping, and payroll services industry as a higher than average regional presence. A third important area of specialization is technology, data processing and hosting and software publishing (more than 5,000 jobs).

¹ Source: Tennessee Department of Labor and Workforce Development, Tennessee Workforce Development Areas, Long Term Projections 2016-2026, jobs4tn.gov.

More Rapid Growth Rates The two industries expected to grow more rapidly than average in all three LWDAs include home health care services (expected to add nearly 4,000 new jobs by 2026) and continuing care retirement communities and assisted living facilities for the elderly (expected to add nearly 3,200 jobs). Other areas of growth in health care are expected to be offices of physicians (UC and SM) and outpatient care centers. Medical and diag-

Table 29: Middle Region LWDA Rapidly Growing Occupations

LWDA	Occupation Title	Percent Change	Annual Total Openings	Educ. Level
Northern Middle	Dental Laboratory Technicians	439.64%	130	HS
Northern Middle	Radio, Cellular, and Tower Equipment Installers and Repairers	94.37%	40	AS
Northern Middle	Reservation and Transportation Ticket Agents and Travel Clerks	87.19%	130	HS
Southern Middle	Residential Advisors	77.72%	60	HS
Northern Middle	Medical Transcriptionists	64.17%	110	PS
Northern Middle	Advertising Sales Agents	63.05%	230	HS
Southern Middle	First-Line Supervisors of Farming, Fishing, and Forestry Workers	60.38%	230	HS
Northern Middle	Farmers, Ranchers, and Other Agricultural Managers	59.07%	920	HS
Northern Middle	Sales Representatives, Wholesale and Manufacturing, Technical, and Scientific Products	56.12%	590	BA
Northern Middle	Brokerage Clerks	54.29%	90	HS
Southern Middle	Home Health Aides	53.55%	90	HS
Northern Middle	Operations Research Analysts	53.13%	110	BA
Southern Middle	Industrial Engineers	51.73%	100	BA
Southern Middle	Mechanical Engineers	51.04%	70	BA
Northern Middle	Physical Therapist Aides	50.99%	170	HS

Source: TN Dept of Labor & Workforce Devel. WIR²ED Division, LWDA Projections 2016-26. Rapidly growing occupations with at least 30 openings, high school or greater education. Educ. Level: HS high school; PS postsecondary non-degree award; As associate's degree; BA bachelor's degree; MA master's degree

nostic laboratories are an emerging industry in the Northern Middle LWDA with a high location quotient and are expected to grow about five percent a year in employment. Individual and family services are expected to add jobs in the LWDAs outside of Nashville.

Construction is expected to expand in Upper Cumberland. As e-commerce expands, Northern Middle will continue its growth in warehousing and storage, projected to add more than 6,000 jobs by 2026. Management of companies and enterprises (corporate headquarters) and the related business services industry are forecast there to add twenty thousand or more jobs through 2026.

Mature Occupations With grocery stores as one of the top mature industries in all of the Middle Region LWDAs, some of the top mature occupations (largest occupations with a positive growth rate) are cashiers, retail salespersons, stock clerks, and supervisors of retail sales workers. None of these occupations require more than a high school degree. Some of the mature occupations that require additional education include registered nurses (associate's or bachelor's degrees) and licensed practical nurses and nursing assistants (requiring postsecondary awards) who work in the LWDAs' mature industries of hospitals, nursing care facilities, and offices of physicians. Both the Upper Cumberland and Southern Middle LWDAs, with significant general freight trucking industries, hire heavy tractor-trailer

truck drivers, who also require postsecondary awards. Nearly 4400 new jobs are expected for general and operations managers through 2026, requiring a bachelor's degree.

Occupations with High Location Quotients Occupations with high location quotients are generally clustered within an LWDA rather than across all three LWDA's in a region. With the Northern Middle LWDA industry specialization in entertainment and sports, multimedia artists and animators and film/video editors (both usually requiring bachelor's degrees) are here. The finance and insurance specialization has created nearly 4,000 jobs in insurance underwriting (usual training – bachelor's degree) and insurance policy processing clerks (high school diploma or equivalent). Medical appliance technicians (high school diploma) is also a growing occupation.






The Southern Middle's specializations in agriculture and transportation equipment manufacturing have created opportunities for farmworkers and their supervisors (high school diplomas) as well as manufacturing workers in durable manufacturing (notably, forging machine setters and operators) and nondurable goods manufacturing. The only manufacturing occupation usually requiring more than high school graduation is tool and die maker (postsecondary award).

The agricultural industries in the Upper Cumberland LWDA require farmworkers, both ranch and those working to raise crops and nursery items, as well as their supervisors. Some of the production occupations with high location quotients include electrical and electronic equipment assemblers, multiple machine tool setters and operators, computer-controlled machine tool operators, and woodworking machine setters, operators, and tenders, all of which usually require a high school diploma.

More Rapidly Growing Occupations Faster-growing occupations in the Middle Region are primarily found in the health care, social services, and technology occupations. Healthcare occupations requiring more than a high school degree include physical therapists in Upper Cumberland; in Upper Cumberland and Southern Middle, nurse practitioners (master's degree) and physical therapy assistants (associate's degree). Higher growth occupations requiring postsecondary awards include medical assistants in Upper Cumberland and medical transcriptionists in Northern Middle. Northern and Southern Middle are expected to have openings for nearly 1,300 personal care aides (high school degree) annually.

Faster-growing computer-related occupations requiring a bachelor's degree include software developers, applications in Upper Cumberland and Northern Middle, as well as operations research analysts in Northern Middle, expected to have about 500 openings annually through 2016. Southern Middle's manufacturing base will require more industrial and mechanical engineers at the bachelor's degree level. Also at the bachelor's degree level there are expected to be nearly 600 openings annually for sales representatives, wholesale and manufacturing, technical and scientific products, in the Northern Middle LWDA.

Tennessee East Region's Economy | 2019

 <p>Employment</p>	<p>Total Employment</p> <p>2019: 1,101,551 2.5%</p> <p>2018: 1,075,068 Stronger</p>	<p>New Jobs</p> <p>2019: 26,483</p> <p>2018: 18,214 Stronger</p>	<p>MSA Employment 2018-2019</p> <p>Cleveland - 3.63% Johnson City - 0.75% Chattanooga - 1.64% Knoxville - 1.38% Stronger</p>
 <p>Employers</p>	<p>Average Number of Establishments</p> <p>2019: 52,611 2.6%</p> <p>2018: 51,282 Stronger</p>	<p>Total Payroll</p> <p>2019: \$47.3 Billion 3.0%</p> <p>2018: \$45.9 Billion Stronger</p>	<p>Counties That Increased Employment</p> <p>2019: 24 2018: 25 Challenge</p>
 <p>Wages & Income</p>	<p>Average Annual Wage</p> <p>2019: \$46,946 1.6%</p> <p>2018: \$46,193 Stronger</p>	<p>East Median Wage</p> <p>2019: \$33,974 2.3%</p> <p>2018: \$33,205 Stronger</p>	<p>Counties That Increased Annual Wages</p> <p>2019: 30 2018: 32 Challenge</p>
 <p>Labor Force & Demographics</p>	<p>Unemployment Rate</p> <p>2019: 3.5% -0.1%</p> <p>2018: 3.6% Stronger</p>	<p>Labor Force</p> <p>2019: 1,141,653 2.3%</p> <p>2018: 1,115,524 Stronger</p>	<p>Unemployment Rates</p> <p>Youth 2018: 11.9% With Disability, 2018: 13.4% % In Poverty, 2018: 16.4% Stronger</p>
 <p>Job Outlook</p>	<p>Ratio of Unemployed to Job Openings</p> <p>June 2019: 0.91 -0.07%</p> <p>June 2018: 0.98 Stronger</p>	<p>Projected Annual Growth Rate, All Occupations</p> <p>2016-2026: 1.1% Stronger</p>	<p>Projected Annual Avg. Job Openings</p> <p>2016-2026: 139,476 Stronger</p>

Workforce and Labor Force Issues in Tennessee's East Region

Population in the East Region in 2019 was estimated at 2,423,434, an increase of 2.20 percent over 2018. This is a faster rate of growth than the previous year's growth of 0.74 percent. All three LWDA's in the East Region increased in population. East LWDA added 30,069 people, Southeast LWDA added 17,225 people, and Northeast LWDA added 4,855 people. Females made-up 51.0 percent of the population in the East Region during 2019. Southeast LWDA had the highest percent of the population be female in 2019 at a rate of 51.2 percent. East LWDA had 51.0 percent of the population was female, and the Northeast LWDA had 50.9 percent of the population was female.

Labor force participation rate in the East Region was 57.8 percent, which is 3.1 percentage points lower than the State's labor force participation rate of 60.9 percent. Southeast LWDA had the highest labor force participation rate at 59.2 percent, while the Northeast LWDA had the lowest labor force participation rate at 53.9 percent. Average unemployment rates decline in all three LWDA's in the East Region, for an East Region average of 4.1 percent. The East LWDA had the highest unemployment rate at 4.4 percent, 0.3 percentage points above the East Region and 1.0 percentage points above the State's rate of 3.4 percent.

The lowest rate of higher educational attainment (attainment of some college or more for those 25 years of age or higher) is in the Northeast LWDA, with a rate of 49.0 percent compared to the East Region's rate of 52.2 percent and the State's rate of 54.6 percent. In the East Region, the highest percentage of those with a high school degree or higher were those who identified as white. Those who identify as Hispanic or Latino only had the lowest percent of high school degrees or higher at 59.68 percent.

Poverty rates decreased in the East Region from 17.0 percent in 2017 to 16.4 percent in 2018. The Northeast LWDA had the highest poverty rate at 18.0 percent, above the East Region and 1.9 percentage points above the State's poverty rate of 16.1 percent. Both Southeast had the lowest poverty rate of 15.8 percent.

The percent of the unemployed with a disability in the East Region was 13.4 percent, 1.0 percentage points higher than the State's percent of the unemployed with a disability of 12.4 percent. The East LWDA had the highest percentage of those unemployed with a disability at 14.1 percent. The Northeast LWDA had the lowest percentage of those unemployed with a disability at 12.6 percent. Percent of those not in the labor force with a disability was at 36.6 percent in the East Region, higher than the State's 34.1 percent of those not in the labor force with a disability. The Northeast LWDA had the highest percent of those not in the labor with a disability at 40.7 percent, while the East LWDA had the lowest at 35.3 percent.

Youth unemployment for those ages 16 to 24 topped 11 percent in all three LWDA's in the East Region. The Northeast LWDA had the highest youth unemployment rate at 12.2 percent. East LWDA and Southeast both had a youth unemployment rate of 11.8. Both of these LWDA's had a rate lower than the total youth unemployment rate for the East Region, which was 11.9 percent.

East Tennessee Local Workforce Development Areas and Counties

Northeast Tennessee (LWDA 1)

Carter	Johnson
Greene	Sullivan
Hancock	Unicoi
Hawkings	Washington

East Tennessee (LWDA 2)

Anderson	Knox
Blount	Loudon
Campbell	Monroe
Claiborne	Morgan
Cocke	Roane
Grainger	Scott
Hamblen	Sevier
Jefferson	Union

Southeast Tennessee (LWDA 4)

Bledsoe	McMinn
Bradley	Meigs
Grundy	Polk
Hamilton	Rhea
Marion	Sequatchie

Table 30: East Region Labor Force Data

	Northeast LWDA	East LWDA	Southeast LWDA	East Region	State Total
Total Population 2018	507,405	1,216,552	647,328	2,371,285	6,651,089
Total Population 2019	512,260	1,246,621	664,553	2,423,434	6,829,174
Male Population 2019	251,503	610,700	324,519	1,186,722	3,332,239
Female Population 2019	260,757	635,921	340,034	1,236,712	3,496,935
Labor Force Participation Rate 2017 (5-Year Estimate)	54.5%	58.6%	58.8%	57.8%	60.9%
Labor Force Participation Rate 2018 (5-Year Estimate)	53.9%	58.7%	59.2%	57.8%	60.9%
Annual Average Unemployment Rate 2018 Percent	4.3%	4.5%	4.2%	4.3%	3.5%
Annual Average Unemployment Rate 2019 Percent	4.1%	4.4%	4.0%	4.1%	3.4%
Educational Attainment 25 Years and Over (2018) Some College Or Higher - Percent	49.0%	52.5%	54.1%	52.2%	54.6%
Poverty Estimate, All Ages, Percent (2018)	18.0%	16.1%	15.8%	16.4%	16.1%
Percentage of Unemployed with a Disability (2018)	12.6%	14.1%	13.0%	13.4%	12.4%
Percent of Those Not in the Labor Force with a Disability (2018)	40.7%	35.3%	35.4%	36.6%	34.1%

Source: U.S. Census, American Community Survey, 2018

Table 31: East Region Educational Attainment by Race, 2018

Educational Attainment	East Region White Only	East Region Black Only	East Region Hispanic or Latino Only	Statewide White Only	Statewide Black Only	Statewide Hispanic or Latino Only
Population 25 years and over	1,495,824	93,733	46,046	3,641,698	697,227	173,116
High school graduate only	929,927	63,957	20,504	2,191,041	457,713	81,607
Percent high school graduate only	62.17%	68.23%	44.53%	60.17%	65.65%	47.14%
High school graduate or higher	1,292,059	79,246	27,479	3,194,533	595,489	107,877
Percent high school graduate or higher	86.38%	84.54%	59.68%	87.72%	85.41%	62.31%
Bachelor degree or higher	362,132	15,289	6,975	1,003,492	137,776	26,270
Percent bachelor degree or higher	24.21%	16.31%	15.15%	27.56%	19.76%	15.17%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 32: East Region Disability Status of Those in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Labor Force	Total Employed	Employed W Disability	Employed W/O Disability	Total Unemployed	Unemployed W Disability	Unemployed W/O Disability
Northeast LWDA	302,596	210,064	197,625	16,083	181,542	12,439	2,312	10,127
East LWDA	733,539	537,982	505,763	31,670	474,093	32,219	5,205	27,014
Southeast LWDA	391,582	288,587	271,248	17,501	253,747	17,339	2,619	14,720
East Region	1,427,717	1,036,633	974,636	65,254	909,382	61,997	10,136	51,861
Tennessee	4,032,296	3,017,707	2,840,526	174,704	2,665,822	177,181	24,835	152,346

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 33: East Region Disability Status of Those Not in the Labor Force, 2018

Area	Civilian Non-institutional Population	Total Not In Labor Force	Not in Labor Force W Disability	Not In Labor Force W/O Disability	% W Disability	% W/O Disability
Northeast LWDA	302,596	92,532	37,697	54,835	40.7%	59.3%
East LWDA	733,539	195,557	69,093	126,464	35.3%	64.7%
Southeast LWDA	391,582	102,995	36,486	66,509	35.4%	64.6%
East Region	1,427,717	391,084	143,276	247,808	36.6%	63.4%
Tennessee	4,032,296	1,014,589	345,629	668,960	34.1%	65.9%

Source: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates

Table 34: East Region Youth Unemployment, Ages 16-24 in 2018

Area	Labor Force	Unemployment	Rate
Northeast LWDA	34,332	4,187	12.2%
East LWDA	89,778	10,615	11.8%
Southeast LWDA	44,024	5,216	11.8%
East Region	168,134	20,018	11.9%

Source: U.S. Census Bureau, 2014-2018 American Community Survey, 2018, 5-year estimates

Table 35: East Region Annual Average Unemployment Rates, 2018 to 2019

Area	2019 Annual Averages				2018 Annual Averages			
	Labor Force	Employment	Unem- ployment Number	Unem- ployment Percent	Labor Force	Employment	Unem- ployment Number	Unem- ployment Percent
UNITED STATES	163,539,000	157,538,000	6,001,000	3.7%	162,075,000	155,761,000	6,314,000	3.9%
TENNESSEE	3,344,800	3,231,500	113,300	3.4%	3,254,300	3,139,900	114,400	3.5%
EAST REGION	1,141,650	1,101,550	40,180	3.5%	1,115,520	1,075,070	40,430	3.6%
Metropolitan Statistical Areas (MSAs)								
Chattanooga, TN-GA MSA	277,330	268,140	9,200	3.3%	271,870	262,240	9,630	3.5%
Hamilton County	185,400	179,390	6,010	3.2%	180,870	174,710	6,160	3.4%
Marion County	12,600	12,060	540	4.3%	12,320	11,740	580	4.7%
Sequatchie County	6,250	5,990	260	4.2%	6,090	5,830	270	4.3%
Georgia Portion	73,080	70,700	2,380	3.3%	72,600	69,970	2,630	3.6%
Cleveland, TN MSA	60,040	57,930	2,110	3.5%	57,810	55,680	2,130	3.7%
Bradley County	52,470	50,650	1,810	3.5%	50,510	48,690	1,820	3.6%
Polk County	7,580	7,270	300	4.0%	7,300	6,990	310	4.2%
Johnson City, TN MSA	92,290	88,840	3,450	3.7%	90,890	87,410	3,480	3.8%
Carter County	24,220	23,240	980	4.1%	23,850	22,860	1,000	4.2%
Unicoi County	7,170	6,810	360	5.0%	7,040	6,690	350	4.9%
Washington County	60,900	58,800	2,100	3.5%	60,000	57,860	2,130	3.6%
Kingsport-Bristol, TN-VA MSA	138,140	133,070	5,060	3.7%	137,030	131,990	5,050	3.7%
Hawkins County	23,990	23,000	990	4.1%	23,740	22,790	950	4.0%
Sullivan County	70,980	68,350	2,630	3.7%	70,350	67,740	2,610	3.7%
Virginia Portion	43,170	41,730	1,450	3.3%	42,940	41,450	1,490	3.5%
Knoxville, TN MSA	432,850	418,960	13,890	3.2%	422,970	409,030	13,940	3.3%
Anderson County	34,950	33,700	1,240	3.6%	34,210	32,910	1,300	3.8%
Blount County	64,120	62,070	2,040	3.2%	62,630	60,600	2,040	3.2%
Campbell County	14,980	14,290	690	4.6%	14,660	13,950	700	4.8%
Grainger County	9,610	9,220	390	4.0%	9,370	9,000	370	4.0%
Knox County	246,230	239,090	7,140	2.9%	240,570	233,450	7,120	3.0%
Loudon County	23,700	22,900	800	3.4%	23,130	22,340	790	3.4%
Morgan County	7,960	7,630	320	4.1%	7,800	7,450	350	4.5%
Roane County	23,620	22,660	960	4.0%	23,080	22,120	960	4.2%
Union County	7,700	7,390	310	4.0%	7,520	7,210	310	4.1%
Morristown, TN MSA	53,180	51,170	2,010	3.8%	51,640	49,660	1,980	3.8%
Hamblen County	28,390	27,290	1,090	3.9%	27,550	26,490	1,060	3.8%
Jefferson County	24,800	23,880	920	3.7%	24,100	23,180	920	3.8%
Micropolitan Statistical Areas (MCSAs)								
Athens (McMinn Co.)	23,880	22,980	900	3.8%	22,720	21,780	940	4.1%
Dayton (Rhea Co.)	13,400	12,640	770	5.7%	13,120	12,380	740	5.7%
Greeneville (Greene Co.)	30,000	28,600	1,400	4.7%	29,820	28,440	1,390	4.7%
Newport (Cocke Co.)	15,160	14,480	690	4.5%	14,900	14,200	700	4.7%
Sevierville (Sevier Co.)	55,230	53,420	1,810	3.3%	53,190	51,330	1,860	3.5%

Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

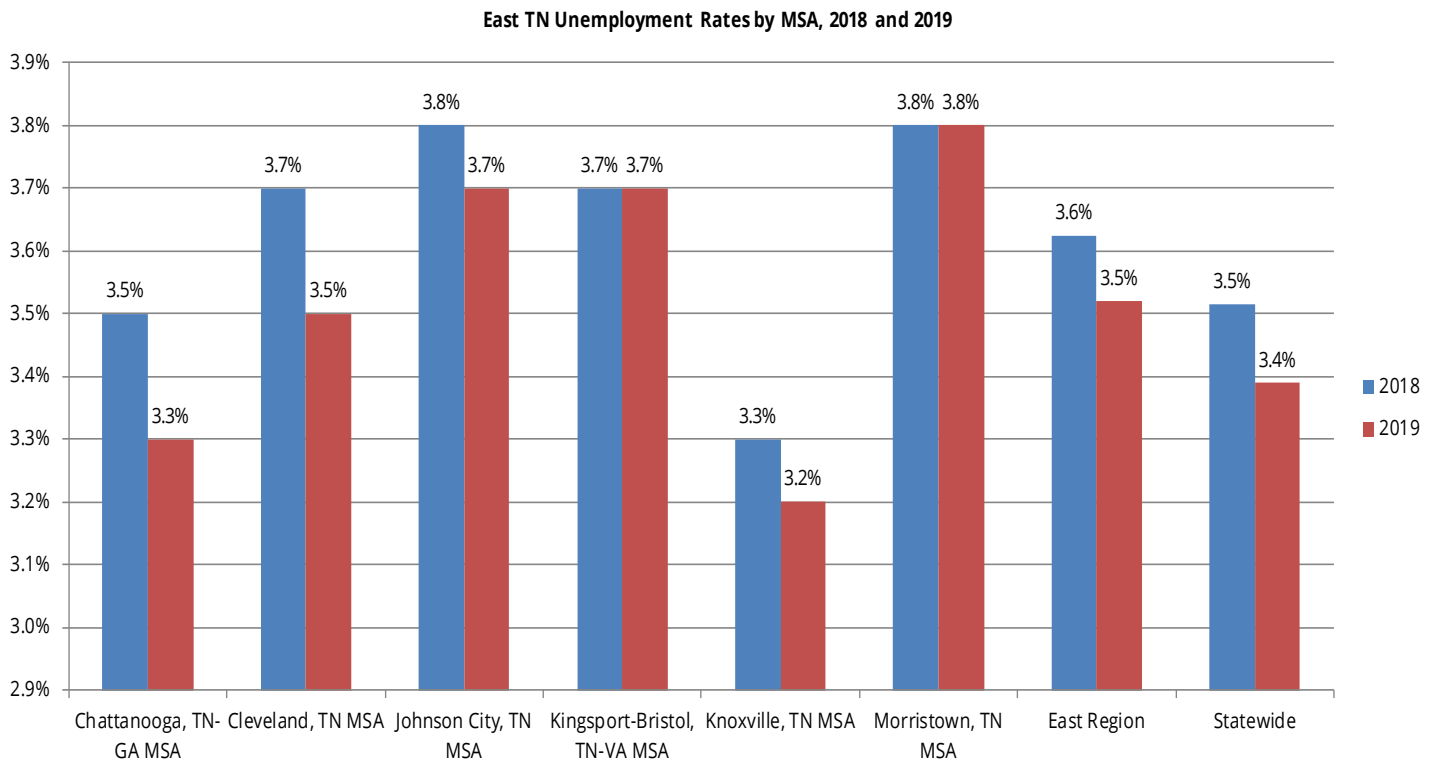
East Region's Unemployment Rates, 2018-2019

In 2019, the average unemployment rate in the East Region was 3.5 percent, which was slightly above the state average of 3.4 percent. Of the six Metropolitan Statistical Areas in the East Region, the Morristown TN MSA had the highest unemployment rate at 3.8 percent in 2019. This was unchanged from the revised 2018 rate of 3.8 percent. The Knoxville, TN MSA had the lowest unemployment rate of 3.2 percent in 2019, down from the revised 2018 rate of 3.3 percent.

Five Micropolitan Statistical Areas are in the East Region. Dayton, TN (Rhea County) micropolitan statistical area had the highest unemployment rate at 5.7 percent in 2019, unchanged from the revised 2018 rate of 5.7 percent. Sevierville, TN (Sevier County) micropolitan statistical area had the lowest unemployment rate in 2019 at 3.3 percent, lower than the revised 2018 rate of 3.5 percent.

The State of Tennessee creates a monthly report of all unemployment rates by State, Region, County, LWDA, Metropolitan Statistical Area, and Micropolitan Statistical Area called the Labor Force Estimates. This report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-force-estimates.html>

The State of Tennessee also creates a monthly report that provides the nonfarm employment, long-term graphs of the unemployment, and a brief explanation for each major MSA in the Tennessee Labor Market Report. That report can be found on the State's website at: <https://www.tn.gov/workforce/general-resources/major-publications0/major-publications-redirect/public-reports-redirect/labor-market-reports.html>



Source: TN Department of Labor and Workforce Development, WIR²ED Division, Local Area Unemployment Statistics

Figure 20

Table 36: East Region - Significant Barriers to Employment

	Northeast LWDA	East LWDA	Southeast LWDA	East Region	State Total
Number of American Indians or Alaskan Natives alone	2,010	5,822	3,803	11,635	32,661
Population Ages 15-19	30,169	76,451	39,529	146,149	424,822
Population Ages 20-24	29,244	76,035	36,458	141,737	406,889
Population Ages 55+	174,404	385,222	200,787	760,413	1,909,264
Number of Veterans 2019	39,483	89,848	43,072	172,403	460,694
Number Below Poverty	88,576	191,460	99,141	379,177	1,046,508
Number With Disability	54,941	103,908	52,693	211,542	534,470
Number of Single Parent Families	33,620	78,741	44,734	157,095	525,144
Probationers and Parolees	6,170	14,926	7,130	28,763	1,894
Community Correction	447	1,086	361	1,533	6,592
Mental Health Court Statistics (FY 2019)	6	0	121	127	260
Limited English Speaking	3,479	576	5,917	9,972	39,123
*Foster Care Services - Youth Aged Out	55	199	71	325	876
Clients In Recovery Courts (2019)	137	581	209	927	3,483
In School Youth Experiencing Homelessness in 2019	1,214	2,261	1,987	5,462	17,228
TANF 24 Months From Ending Total 2019	134	209	166	509	1,680

* Counties of commitment, not residence.

Source: Population: U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates.

Probationers and Parolees, Community Corrections: Dr. Mary Karpos, TN Department of Correction, Community Supervision.

Mental Health Court and Recovery Court Statistics: Rebekah Provost-Emmons, Recovery Court Administrator, Office of Criminal Justice Services, Division of Substance Abuse Services.

Limited English Speaking: U.S. Census Bureau, American Community Survey, 2018.

Foster Care Services: Dave Aguzzi, Office of Independent Living, TN Department of Children's Services.

In School Youth Experiencing Homelessness: Josh Carlson, Data Management Division, TN Department of Education.

TANF 24 Months for Ending Eligibility: Lakecia Peerson, Division of Family Assistance and Child Support, TN Department of Human Services.

The Workforce Innovation and Opportunity Act (WIOA) focuses on individuals with significant barriers to employment, with categories specifically defined in the WIOA guidelines. The above table lists individuals in the East Region and local workforce development areas with significant barriers, based on available data from the sources listed. The largest categories in the East Region were the population aged 55 and above, the number below poverty, and the number of youth aged 16-24. The East Region had 40 percent of the state total of those aged 55 and over, 40 percent of those with disabilities, and 48 percent of those in mental health courts. The average number of those unemployed for 27 weeks or more in 2019 statewide (regional data not available) was 16,475. Of those, blacks were 3,850, Hispanic individuals were 950, youth ages 16-19 were 825, and females were 7,500 of the total.

Total employment in the East Region, excluding agriculture and the self-employed, increased from 1,075,068 to 1,101,551, an increase of 2.5 percent or nearly 26, 500 jobs (see East Region Summary, p. 55). This rate of job growth was faster than that of the state as a whole.

Employment in the metropolitan areas varied significantly across the region (see figure 21). The most rapidly-growing MSA was Cleveland, with employment growth almost twice as fast as the state. The Morristown MSA exceeded the state growth rate, as well. Taken together, however, the average growth rate for employment in MSAs in the East region was 1.3 percent, below the state average, with the Kingsport-Bristol, TN-VA MSA declining by 0.3 percent.

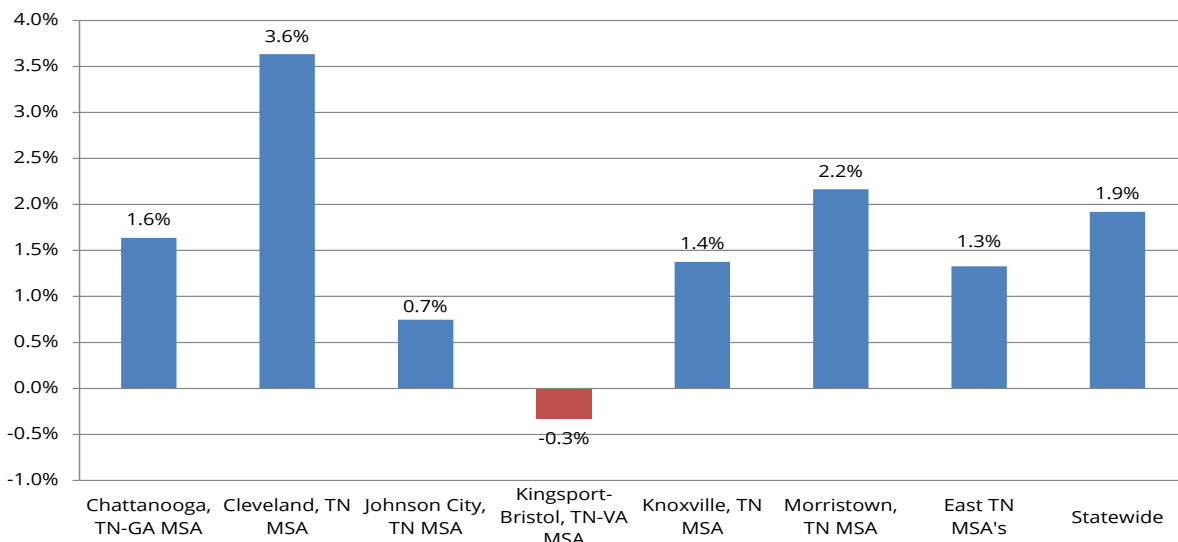
The West Region consists of three Local Workforce Development Areas and within them, 34 counties (see list p. 56). Of these, 24 counties increased employment from 2018 to 2019, almost the same number as in the previous year. The average number of establishments increased by 1,329 over the year and payroll increased by three percent to \$47.3 billion. Total payroll in this region accounts for nearly one in every three dollars in the state.

The average annual industry wage in the region, calculated by dividing the total payroll by the average number of workers, increased by 1.6 percent in 2019 to \$46,946, nearly \$5,000 below the state average. The median occupational wage increased by 2.3 percent to \$33,974, nearly \$2,000 below the state median. With regard to the labor force, the average unemployment rate decreased from 2018 to 2019 to 3.5 percent, very close to the state average. The labor force increased over the year by 2.3 percent, slightly slower than the state.

On a positive note, youth unemployment in 2018 (the latest available) stood at 11.9 percent, lower than the state rate of 12.8 percent. The percent of those in poverty who were unemployed that year was 16.4 percent just above the state rate of 16.1 percent. Also in 2019, the number of unemployed compared to the number of job listings on the state job bank, jobs4tn.gov, was less than one unemployed person per job opening.

In summary: In 2019 compared to 2018, the East Region saw positive growth in employment, but growth rates varied significantly by metropolitan area, with at least one MSA declining in employment. Payroll increased, somewhat slower than the rest of the state. The level of the annual average wage and median wage were lower than the state; however, the average unemployment rates overall and for youth and those in poverty were similar to state levels. With the number of job openings listed more than the number of unemployed in 2019, it is likely that skill gaps or other barriers existed, preventing the unemployed from filling additional jobs. The forecast for long term projections to 2026 is for an average of 139, 476 job openings annually in the West Region.

East TN MSA Job Growth 2018-2019



Source: TN Department of Labor & Workforce Development, Current Employment Statistics
Figure 21

Distressed Counties Distressed counties rank among the 10 percent most economically distressed counties in the nation. Each year, the Appalachian Regional Commission (ARC) prepares an index of county economic status for every county in the United States. Economic status designations are identified through a composite measure of each county's three-year average unemployment rate, per capita market income, and poverty rate. Based on these indicators, each county is then categorized as distressed, at-risk, transitional, competitive or attainment. Distressed counties in the East Region include Hancock County, in Northeast LWDA; Cocke County and Scott County, in East LWDA; and Bledsoe County and Grundy County, in Southeast LWDA.

Table 37: East Region Distressed Counties

County	2018 Population	2018 Per Capita Income	2018 Poverty Rate	Employment, Q4 2019	Unemployment Rate, 2019
Bledsoe	14,602	\$17,445	20.3%	2,237	5.4%
Cocke	35,336	\$20,016	24.9%	7,527	4.5%
Grundy	13,331	\$18,676	24.3%	2,102	4.1%
Hancock	6,585	\$15,668	25.8%	935	5.9%
Scott	21,954	\$18,524	22.3%	5,740	4.4%

Source: Transparent Tennessee, tn.gov

East Region May 2019 Occupational Employment

The office and administrative support occupational group was the largest in the East Region in May 2019, according to the annual Occupational Employment Survey, which provides data on all industries except agriculture, the self-employed, and a few not covered by Tennessee's unemployment insurance system. Employment was 14 percent of total employment in the region and exceeded 141,000 workers, with average entry level wages about \$2,000 more than the average for all occupations in the Region (\$20,904). Salaries of experienced workers in the group averaged \$42,264.

Other employees with greater than five percent of occupational employment in the Region included:

- Food Preparation and Serving workers- 102,990 (10.2%)
- Production workers -102,340 (10.2%)
- Sales and Related workers- 98,340 (9.8%)
- Transportation and Material Moving - 94,680 (9.4%)
- Healthcare Practitioners and Technical workers -67,410 (6.7%)
- Management workers-55,990 (5.6%)
- Education, Training, and Library workers- 52,850 (5.3%)

Compared to state occupational employment, the East Region has a greater percentage of transportation and material moving employees (15 percent vs. 11.3 percent) and smaller percentages of food preparation and serving and sales and related employees and a slightly smaller proportion of production employees (8.2 v. 8.9 percent).

How different are the salaries for the employees in these occupational groups in the West Region compared to the state? The median annual salary for the East Region is 95 percent of the state median pay. Several occupational groups in the East have lower median salaries than the state, notably management (93 percent of the state median), office and administrative occupations (94 percent of state median), sales and related (94 percent of state median), and arts, design, entertainment and sports occupations (87 percent of state median). This last category may be lower due to the lack of professional sports teams in the East Region.

Table 38: Occupational Employment and Wage Rates (OES) for All Major Groups in the East Region in 2019

Occupation	Occupation Code	Employment	Entry Level Salary	Median Salary	Experienced Salary
Total All Occupations	000000	1,004,560	\$20,904	\$33,974	\$54,623
Architecture and Engineering	170000	16,800	\$43,954	\$73,362	\$97,882
Arts, Design, Entertainment, Sports, and Media	270000	9,640	\$22,975	\$38,342	\$59,391
Building and Grounds Cleaning and Maintenance	370000	33,080	\$18,011	\$23,184	\$29,810
Business and Financial Operations	130000	36,370	\$35,373	\$55,615	\$76,726
Community and Social Services	210000	12,670	\$26,100	\$39,466	\$48,551
Computer and Mathematical	150000	16,900	\$41,524	\$68,701	\$89,514
Construction and Extraction	470000	33,220	\$27,365	\$38,037	\$49,297
Education, Training, and Library	250000	52,850	\$24,540	\$47,163	\$61,075
Farming, Fishing, and Forestry	450000	1,260	\$21,261	\$31,277	\$39,658
Food Preparation and Serving Related	350000	102,990	\$17,591	\$19,905	\$24,286
Healthcare Practitioners and Technical	290000	67,410	\$34,572	\$54,126	\$84,733
Installation, Maintenance, and Repair	490000	43,350	\$27,755	\$41,906	\$54,033
Legal	230000	4,780	\$37,736	\$69,858	\$115,861
Life, Physical, and Social Science	190000	6,910	\$37,944	\$58,661	\$83,110
Management	110000	55,990	\$43,151	\$79,204	\$121,078
Office and Administrative Support	430000	141,260	\$23,069	\$32,845	\$42,264
Personal Care and Service	390000	19,690	\$17,686	\$22,302	\$30,332
Production	510000	102,340	\$24,714	\$34,111	\$43,619
Protective Service	330000	18,550	\$23,920	\$36,428	\$48,003
Sales and Related	410000	98,340	\$18,836	\$24,912	\$43,288
Transportation and Material Moving	530000	94,680	\$21,051	\$30,075	\$40,131

Source: TN Dept of Labor & Workforce Dev, Div Emp Sec, LMI

The median wage is estimated 50th percentile: 50 percent of workers in occupations earn less than the median wage, and 50 percent earn more than the median wage. Entry level and Experienced wage rates represent the means of the lower 1/3 and upper 2/3 of the wage distribution, respectively. Data is from an annual survey.

Targeted Industries and Occupations in the East Region

Several ways to target industries for workforce services include looking at mature industries, industries with high location quotients when employment is compared to the state, and those which have greater potential for growth.

Mature Industries Detailed Industries with the highest employment and positive growth rates and which are found in all three of the LWDA in the East Region are in professional and business services, health care, and government.¹ They include:

- Management of Companies and Enterprises, with 14,700 employment;
- Offices of Physicians, with 24,570 employment;
- Employment Services, with 25,570 employment;
- General Medical and Surgical Hospitals, with 40,050 employment; and
- Local Government, except Education and Hospitals, with 40,500 employment.

Although these industries appeared in all three LWDA, the expected growth rates varied across the LWDA. Annual growth rates for hospitals and offices of physicians were expected to be two to three times faster in the Southeast LWDA than in East.

Mature industries found in two of the three LWDA included the construction industry of building equipment contractors with more than 9,000 employment (E,NE); related is the service-providing industry of services to buildings and dwellings (E,SE). Also, education industries are major employers in the East and Southeast, with 41,610 employed in elementary and secondary schools and 21,220 in colleges, universities, and professional schools.

The Southeast LWDA had several mature industries in finance and transportation which also have high location quotients, indicating area specialization: insurance carriers, and general and specialized freight trucking (11,410 employment). In the East, motor vehicle parts manufacturing was employing 11,820 workers and had a high location quotient as well.

High Location Quotients In the East LWDA, the highest location quotient, indicating area specialization, was for the scientific research and development industry, employing 6,500. Other areas of specialization were primarily in manufacturing, including motor vehicle body and trailer, ship and boat, navigation and control equipment, and aerospace parts manufacturing, employing a total of 5,900 workers. In the Northeast LWDA, manufacturing was also prominent: chemical and rubber products manufacturing employed a total of 11,080. Other industries especially prominent in the Northeast included agricultural production and the amusement and recreation industries.

Industries with high location quotients in the Southeast were primarily in manufacturing as well. Food (bakeries and tortillas), electrical equipment and components, household appliance, plastics, and converted paper products manufacturing all were more important here than in Tennessee as a whole, employing approximately 10,500 workers.

More Rapidly Growing Industries The only larger industry that is expected to grow faster than average across all three LWDA is the professional and technical industry of computer systems design and related services, which employed about 3,400 workers. Other industries expected to grow rapidly in two LWDA, East and Southeast, were in the service-providing industries of activities related to real estate, office administrative services (4,060 employment), and the healthcare and social assistance industry of home health care services (4,060 employment).

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¹ Source: Tennessee Department of Labor and Workforce Development, Tennessee Workforce Development Areas, Long Term Projections 2016-2026, jobs4tn.gov.

The social assistance industry of residential, intellectual and developmental disability, mental health, and substance abuse facilities (total of 2,560 employment) is expected to grow more rapidly in the East and Northeast.

Several rapidly-growing industries were found primarily in one LWDA. In the East LWDA trade and transportation sector, the electronic shopping and mail order industry, with about 2,000 employment, was also an industry with

Table 39: East Region LWDA Rapidly Growing Occupations

LWDA	Occupation Title	Percent Change	Annual Total Openings	Educ. Level
East	Residential Advisors	75.99%	320	HS
East	Mental Health Counselors	65.27%	60	N/A
Northeast	Message Therapists	64.62%	30	PS
Northeast	Psychiatric Aides	55.42%	100	HS
Northeast	Software Developers, Applications	53.09%	40	BA
Southeast	Software Developers, Applications	52.32%	100	BA
Southeast	First-Line Supervisors of Farming, Fishing, and Forestry Workers	52.07%	30	HS
East	Home Health Aides	49.73%	240	HS
East	Psychiatric Aides	49.73%	240	HS
Southeast	Message Therapists	47.14%	40	PS
Southeast	Phlebotomists	47.12%	30	PS
Southeast	Home Health Aides	49.73%	240	HS
Southeast	Web Developers	45.54%	30	AS
Southeast	Nurse Practitioners	45.54%	70	MA
East	Software Developers, Applications	45.18%	110	BA

Source: TN Dept of Labor & Workforce Devel. WIR²ED Division, LWDA Projections 2016-26. Rapidly growing occupations with at least 30 openings, high school or greater education. Educ. Level: HS high school; PS postsecondary non-degree award; As associate's degree; BA bachelor's degree; MA master's degree

a high location quotient for the region and is an emerging industry. In the Southeast, the transportation industries of general and specialty freight trucking are top mature industries as well as those with higher expected growth rates.

Mature Occupations Many of the workers in mature occupations across the LWDAs in the East Region require no formal education or a high school degree. This includes cashiers, retail salespersons, their supervisors, customer service representatives, stock clerks, and general office clerks found in all the LWDAs in the region. Mature occupations (the largest occupations in the LWDAs with a positive growth rate) requiring training include registered nurses (associate's or bachelor's degree) working in hospitals, offices of physicians, employment services, and local government and licensed practical nurses and nurse assistants (postsecondary award) also working in these industries. The annual number of openings for registered nurses in the East Region is expected to be 1410; in the Northeast, 180 annual openings for LPNs and 420 for nursing assistants.

General and operations managers (bachelor's degree) work in management of enterprises, local government, education, and manufacturing, and are expected to have 1,500 openings across the Region. Bookkeepers, requiring some college, work in all the industries mentioned above and are expected to have a total of 1,170 annual openings in the East and Southeast.

Occupations with High Location Quotients In Southeast Tennessee, occupations with high location quotients are some of the most unique in the state. The nuclear industry under TVA requires a limited number of nuclear engineers and nuclear power reactor operators. Reactor operators are trained after completing a high school degree. Nuclear engineers, nuclear technicians (requiring an associate's degree) and hazardous materials workers are occupations with high location quotients in East LWDA.

Educational institutions in the Southeast LWDA employ business teachers, postsecondary, another occupation with a high location quotient. Also in the Southeast, three manufacturing occupations with high location quotients are

chemical equipment operators, photographic process workers, and foundry mold and coremakers.

Occupations with high location quotients in the Northeast include farmers and ranchers and farming supervisors. Engineering technicians, except drafters, can work in a variety of industries from construction to manufacturing to business services and require an associate's degree and are expected to have about 30 annual openings. Psychiatric aides are expected to have about 100 openings annually and can work in residential mental health and substance abuse facilities which are growing more rapidly than average in the Northeast.

More Rapidly Growing Occupations The one occupation expected to grow rapidly in all East LWDA is software developer, applications. Usually requiring a bachelor's degree, about 250 annual average openings are expected. Web developers (associate's degree) is expected to have about 30 openings annually in the Southeast LWDA.

The growing industry of residential intellectual and developmental disability, mental health, and substance abuse facilities was expected to create jobs for mental health counselors in the East and Northeast (total of 80 annual openings), substance abuse and behavioral disorder counselors (estimated 80 openings the East LWDA), positions for residential advisors in the East and Northeast (480 openings per year), and positions for psychiatric aides, as mentioned previously. In the Southeast, nurse practitioners should add about 70 positions annually. Care for seniors and those with disabilities is expected to add hundreds of personal care aide positions, especially in the East LWDA.

In the goods producing industries, significant numbers of farmers and farm managers will be needed in the Northeast, and farmworkers and their supervisors in the Southeast.

Workforce Strategies

For 2020, Tennessee's Workforce Innovation and Opportunity Act goals consist of the following: to

1. Increase access to education, training and employment- particularly for people with significant barriers to employment.
2. Create a comprehensive, high-quality workforce development system by aligning workforce investment, education, and economic development.
3. Improve the quality and labor market relevance of workforce investment, education and economic development efforts.
4. Promote improvement in the structure and delivery of services.
5. Increase economic self-sufficiency, meet employer need, and enhance the productivity and competitiveness of Tennessee.

Strategies

Improved workforce outcomes require individuals to acquire skills and be in communities that promote the development and use of those skills. Based on their research on human development, Heckman and Corbin¹ identify six internal capabilities or skills that are necessary for human flourishing or well-being:

- Social Engagement
- Earnings and Income
- Physical and Mental Health
- Avoiding Crime and Delinquency
- Educational Attainment
- Reflective Decision Making

Successful workforce development policies are designed to foster positive outcomes in all areas, knowing that all are important for individual and family self-sufficiency. They include methods for assessing the status of individuals with regard to their skill levels in these areas and designing individual and community approaches which will enhance skill development.

The following regional and local strategies currently utilized in Tennessee workforce development support skill acquisition in these six areas. Many strategies overlap, promoting skills development in more than one area, but are listed in the area they primarily influence. Integrated strategies increase the breadth of components covered.

Social Engagement

- Work-based learning
- Youth demonstration grants
- Soft skills development

¹ J. Heckman and C. Corbin. (2016) Capabilities and skills. *Journal of Human Development and Capabilities*, 17 (3), 342-359.

Earnings and Income

- Rural economic development initiatives, especially focused on reducing the number of distressed and at-risk counties, and other business grants
- Unemployment Insurance
- Apprenticeship programs
- Services to those with disabilities
- Veterans' and spouse services
- Entrepreneurial skills
- Attainable entry requirements
- Transitional job practices
- Incumbent worker training
- SNAP, TANF co-enrollment in WIOA and integration in American Job Centers
- Re-employment of dislocated workers
- On-the-job training
- Industry sector partnerships
- Building career pathways for youth in manufacturing
- Targeting economically distressed residents for self-sustaining careers
- RAMP apprenticeship program
- REAP pre-apprenticeship and entry into apprenticeship with employer
- YouthBuild Memphis
- Pathways development

Crime and Delinquency

- Services to justice- involved individuals with Tennessee Department of Corrections, Offices of Re-entry, prisons, county jails, and youth detention centers
- RAMP: Re-entry Advanced Manufacturing Program- technician training
- Recovery Courts
- Hope2Hire career planning

Physical and Mental Health

- Identifying and promoting soft skills development
- Supportive Services Review
- Development of individualized client plans and the supportive services that are needed to overcome barriers

Reflective Decision Making

- Transitional job practices
- Student- Business interaction (E2E)
- Student early exposure to in-demand pathways
- Career awareness and use of labor market information
- Promoting the development of critical thinking
- Mentoring

Educational Attainment

- Skills upgrading for dislocated workers
- Integrated adult education and workforce services
- Apprenticeship programs
- Review of CTE programs to align with business needs
- Focus on those needing to complete college (Reconnect) and those without high school degrees
- Youth programming 16-24 (all skill areas)
- THEC Rural Educational Strategy Sessions
- Pathways development
- GIVE grants

One skill area critical to success is the physical and mental health of participants. Especially critical for reducing and preventing homelessness, as well as for those with insufficient earnings or income, is access to physical and mental health services, adequate nutrition, housing and living in a safe environment, and transportation. Childcare is also critical, especially for one-parent families. With the social distancing requirements of the current pandemic, access to technology has become a necessity. Assessing participants' needs and seeking additional public resources can aid participant retention and program success. Assessment tools can be very valuable in helping interviewers to pinpoint specific barriers to employment and to help them in making referrals.²

In working regionally, Janice Urbanik of the National Fund for Workforce Solutions discusses the liability of having too many low-wage jobs in an area; it produces a weak foundation for economic recovery. Workforce developers need to place employees with businesses who meet minimum standards. Business services staff can assist employers in initiating supervisory training that focuses on racial equity, assist with information on pay equity, and advocate for employers to provide financial wellness programs for employees, which can help them increase their savings and reduce debts. Evidence has shown that employers who invest in their workforce prepare workers to do better quality work and can give employers a competitive advantage.³

One of Tennessee's key strategies in 2019- 2020 is to double the number of apprenticeships in the state, as a method of increasing the income, skilled training, and employment of individuals with barriers to employment.

² E. Poe-Yamagata, J. Benus, N. Bill, H. Carrington, M. Michaelides, & T. Shen. "Impact of the reemployment and eligibility assessment Initiative." IMPAQ: June 2011, p. 28. ETAOP_2012_08_Impact_of_the_REA_Initiative.pdf.

³ J. Urbanik, National Fund for Workforce Solutions, webinar "Importance of Job Quality in Recovery," Leading Workforce Resurgence Series, Federal Reserve Bank of Atlanta, July 8, 2020.
<http://www.frbatlanta.org/cweo/ask-us-anything/2020/07/31/ask-us-anything-importance-of-job-quality-in-recovery>.

Apprenticeship

In July 2019, Tennessee's Labor and Workforce Development Department received an Apprenticeship State Expansion grant in the amount of \$4.2 million dollars. This grant provided the opportunity for the state to establish an Apprenticeship Office under the Workforce Services Division. In September 2019 the state apprenticeship director was hired and charged with building a cross-functional team focused on growing the number of apprentices across the state including increasing the number of newly created Registered Apprenticeship Programs (RAP) and developing talent pipelines via pre-apprenticeship programs as a dependable workforce strategy for Tennessee employers. The Office is focused on the expansion and creation of both traditional and nontraditional apprenticeship occupations and increasing the diversity of the participants.

Under the newly formed Apprenticeship Office, ApprenticeshipTN emerged. ApprenticeshipTN is a statewide initiative powered by the Tennessee Workforce Development System (TWDS) to create a greater awareness of apprenticeship opportunities for employers and workers in every area of Tennessee. Under the direction set by Governor Bill Lee, TWDS creates a pathway to shared resources between agencies. The partnership allows Tennessee to more efficiently increase the number of RAPs and apprentices, helping bridge the skilled labor gap in the state. The TWDS is a consortium of seven state agencies working together to bolster the number of apprenticeships in Tennessee. The Department of Labor and Workforce Development, Tennessee College System, Tennessee Higher Education Commission, Department of Education, Department of Economic and Community Development, Department of Human Services, and Department of Correction each play a critical role in the ApprenticeshipTN program.

Since the formation of the Apprenticeship Office, new program development in RAP has significantly surpassed the number registered in the previous years, closing out the 2019 fiscal year with an all-time hire of 30 new RAPs.

Apprenticeship is an industry-driven, high-quality career pathway where employers can develop and prepare their future workforce, and individuals can obtain paid work experience, classroom instruction, and a portable, nationally-recognized credential. For the calendar year 2019, data on apprenticeship completers in Tennessee were obtained from Workforce Services Apprenticeship Office. Tables 40-42 include the names of apprenticeship sponsors with completers in 2019 in the East, Middle, and West Regions of Tennessee, who are also identified by county. Table 43 lists the apprenticeship occupations which had completers in calendar Year 2019. Compared to 2018, this year had 138 more apprenticeship completers, for a total of 843. Forty-four unique occupations had completers in 2019, although some occupations differ from previous years. Occupations in 2019 which did not have completers in 2018 were the following:

- Boiler Maker
- Career Development Technician
- Electronic Systems Technician
- Industrial Manufacturing Technician
- Machine Operator
- Medical Assistant
- Operating Engineer
- Press setup Operator – Stamping

As in the previous year, the largest number of completers are in the East Region, with 52% of the completers. However, the Middle Region had a strong year increasing the number of completers by 10%, finishing the year with 30% of the overall completers. The West Region had 18% of the total completers.

Table 40: Registered Apprenticeship Sponsors with Completers 2019 East Region

Apprenticeship Sponsors	County	LWDA	Completers
Baldor Electric Company	Hawkins	Northeast	1
Mountain Electric Cooperative	Johnson	Northeast	2
Primester	Sullivan	Northeast	4
Eastman Chemical Co. - Coal Gas Division	Sullivan	Northeast	5
Massey Electric, In. #2	Sullivan	Northeast	5
Domtar Paper Company	Sullivan	Northeast	6
Eastman Chemical Co. - TN Operations	Sullivan	Northeast	95
Tri-Cities Electrical JATC	Sullivan	Northeast	3
Nuclear Fuel Services	Unicoi	Northeast	1
Plumber and Pipefitters, Local Union 538 JATC	Washington	Northeast	1
AO Smith	Washington	Northeast	1
Total Northeast LWDA	--	Northeast	124
Eagle Bend Manufacturing	Anderson	East	3
Knoxville Painters	Anderson	East	2
Oak Ridge Electric JATC	Anderson	East	18
Arconic	Blount	East	1
Massey Electric #1	Blount	East	5
Lear Corporation	Hamblen	East	5
TVA	Knox	East	37
Funderburk Electrical Services	Knox	East	7
Knoxville Plumbing Heating Air Conditioning Cont	Knox	East	9
Electrical Training Academy Knoxville	Knox	East	22
Knoxville Plumbers & Steamfitters JATC	Knox	East	9
Knoxville Ironworkers JAC	Knox	East	6
Knoxville Area Sheet Metal JAC	Knox	East	6
Insulators Local 46 JATC	Knox	East	6
Resource Valley	Knox	East	22
Knoxville Laborers JATC	Knox	East	20
JTEKT Automotive	Monroe	East	2
Dienamic Tooling Systems Inc	Roane	East	4
Total East LWDA	--	East	184
Chattanooga State Community College	Hamilton	Southeast	1
Tennessee Carpenters Regional Council J.A.T.C.	Hamilton	Southeast	13
Westrock	Hamilton	Southeast	3
Gestamp Chattanooga, LLC	Hamilton	Southeast	16
Chattanooga Electrical JATC	Hamilton	Southeast	68
Ua Local 43 Plumbers Steamfitters JATC	Hamilton	Southeast	17
Chattanooga Ironworkers JAC	Hamilton	Southeast	3
E&E Manufacturing Of Tennessee, LLC	McMinn	Southeast	2
ABB	McMinn	Southeast	1
Operating Engineers Local No. 917 Apprenticeship &	McMinn	Southeast	4
Total Southeast LWDA	--	Southeast	128
Grand Total For East Region	--	--	436

Source: Office of Apprenticeship, Employment and Training Administration, U.S. Department of Labor

Table 41: Registered Apprenticeship Sponsors with Completers 2019 Middle Region

Apprenticeship Sponsors	County	LWDA	Completers
Boilermakers S A J A C	Davidson	Northern Middle	116
Elevator Constructors Local 93	Davidson	Northern Middle	6
ABEC Electric Company, LLC	Davidson	Northern Middle	5
Harlan Electric	Davidson	Northern Middle	2
Nashville Electric Service	Davidson	Northern Middle	1
Nashville Electric Service	Davidson	Northern Middle	1
Travis Electric Co	Davidson	Northern Middle	2
American Commercial Industrial Electric, LLC	Davidson	Northern Middle	1
Nashville Electrical JATC	Davidson	Northern Middle	31
Nashville Sheetmetal JATC	Davidson	Northern Middle	11
Nashville Ironworkers	Davidson	Northern Middle	14
Nashville Plumbers and Pipefitters	Davidson	Northern Middle	2
Nashville Plumbers and Pipefitters	Davidson	Northern Middle	1
Nashville Plumbers and Pipefitters	Davidson	Northern Middle	24
Nashville Plumbers and Pipefitters	Davidson	Northern Middle	1
Heat & Frost Insulators Local #86 JATC	Davidson	Northern Middle	5
Nashville Electric Service	Davidson	Northern Middle	5
Nashville Electric Service	Davidson	Northern Middle	3
Nashville Electric Service	Davidson	Northern Middle	7
Stansell Electric Apprenticeship Training Program	Davidson	Northern Middle	6
John Bouchard & Sons Co.	Davidson	Northern Middle	1
Messer Construction Co.	Davidson	Northern Middle	1
Cumberland Electric Membership Corporation	Montgomery	Northern Middle	3
Middle Tennessee Electric Membership Cor	Rutherford	Northern Middle	3
North American Stamping Group	Sumner	Northern Middle	4
Total Northern Middle LWDA	--	Northern Middle	256
Grand Total For Middle Region	--	--	256

Source: Office of Apprenticeship, Employment and Training Administration, U.S. Department of Labor

Table 42: Registered Apprenticeship Sponsors with Completers 2019 West Region

Apprenticeship Sponsors	County	LWDA	Completers
Southwest Tennessee EMC	Haywood	Southwest	2
American Fire Protection Group	Madison	Southwest	3
Delta Electrical, Inc.	Madison	Southwest	1
Jackson Energy Authority	Madison	Southwest	3
Total Northeast LWDA	--	Southwest	9
Amtek	Dyer	Northwest	1
Weakley County Electric	Weakley	Northwest	2
Total Northwest LWDA	--	Northwest	3
Chickasaw Electric Cooperative	Fayette	Greater Memphis	1
Customized Medical Management Group, LLC	Shelby	Greater Memphis	1
FCI	Shelby	Greater Memphis	1
FCI	Shelby	Greater Memphis	2
FCI	Shelby	Greater Memphis	1
FCI	Shelby	Greater Memphis	3
International Union of Elevator Constructors Local	Shelby	Greater Memphis	2
KLAP, Inc	Shelby	Greater Memphis	2
Memphis Asbestos JAC	Shelby	Greater Memphis	2
Memphis Electrical JATC	Shelby	Greater Memphis	27
Memphis Ironworkers JAC	Shelby	Greater Memphis	5
Memphis Light, Gas, and Water	Shelby	Greater Memphis	1
Memphis Light, Gas, and Water	Shelby	Greater Memphis	1
Memphis Light, Gas, and Water	Shelby	Greater Memphis	6
Memphis Light, Gas, and Water	Shelby	Greater Memphis	7
Memphis Light, Gas, and Water	Shelby	Greater Memphis	4
Memphis Plumbers JAC	Shelby	Greater Memphis	5
Memphis Sheet Metal Workers Jac	Shelby	Greater Memphis	7
Mid South Independent Electrical Contrac	Shelby	Greater Memphis	41
Steamfitters Local Union 614 Joint Apprenticeship Training Program	Shelby	Greater Memphis	18
West TN Associated Builders & Contractor	Shelby	Greater Memphis	2
Total Greater Memphis LWDA	--	Greater Memphis	139
Grand Total For West Region	--	--	151

Source: Office of Apprenticeship, Employment and Training Administration, U.S. Department of Labor

Table 43: Apprentice Completers 2019 by Job Title and Workforce Development Area

Occupational Job Titles of Training Completers	Totals	NE LWDA	East LWDA	SE LWDA	UC LWDA	SM LWDA	NM LWDA	SW LWDA	NW LWDA	GM LWDA
Boilmaker I	116						116			
Career Development Technician	1									1
Carpenter	8		1	6			1			
Carpenter, Maintenance	2									2
Chemical Laboratory Technician	6	6								
Chemical Operator III	47	47								
Composite Plastic Fabricator	13		6				5			2
Construction Craft Laborer	20		20							
Electric Meter Repairer	6						5			1
Electrician	299	12	95	68			51	1	1	71
Electrician, Maintenance	4			4						
Electrician, Powerhouse	1									1
Electrician, Substation	6									6
Electromechanical Technician	23	20		3						
Electronic Systems Technician	2									2
Elevator Constructor	8						6			2
Greenskeeper II	3									3
Heating & Air-Conditioner Install/Service	3		1				2			
Heating, Ventilation, Air Conditioning	1						1			
Industrial Manufacturing Technician	1			1						
Line Erector	21		16				3		2	
Line Installer-Repairer	25	2					10	5		8
Machine Operator I	11			11						
Machinist	3	3								
Maintenance Mechanic (Any Industry)	5	4					1			
Maintenance Repairer, Industrial	12	8	3				1			
Mechanic, Industrial Truck	1	1								
Mechatronics Technician	2	2								
Medical Assistant	1									1
Metal Fabricators	7	7								
Millwright	7			7						
Operating Engineer	4			4						
Painter (Construction)	2		2							
Pipe Fitter (Construction)	71	1	9	16			24	3		18
Plumber	13		6	1			1			5
Power-Plant Operator	5	5								
Press Setup Operator - Stamping	2			2						
Refinery Operator	5	5								
Sheet Metal Worker	26		8				11			7
Structural Steel Worker	28		6	3			14			5
Tool and Die Maker	17		11	2			4			
Transformer Repairer	4									4
Wastewater-Treatment - Plant Operator	1	1								
Totals for LWDA	843	124	184	128	0	0	256	9	3	139

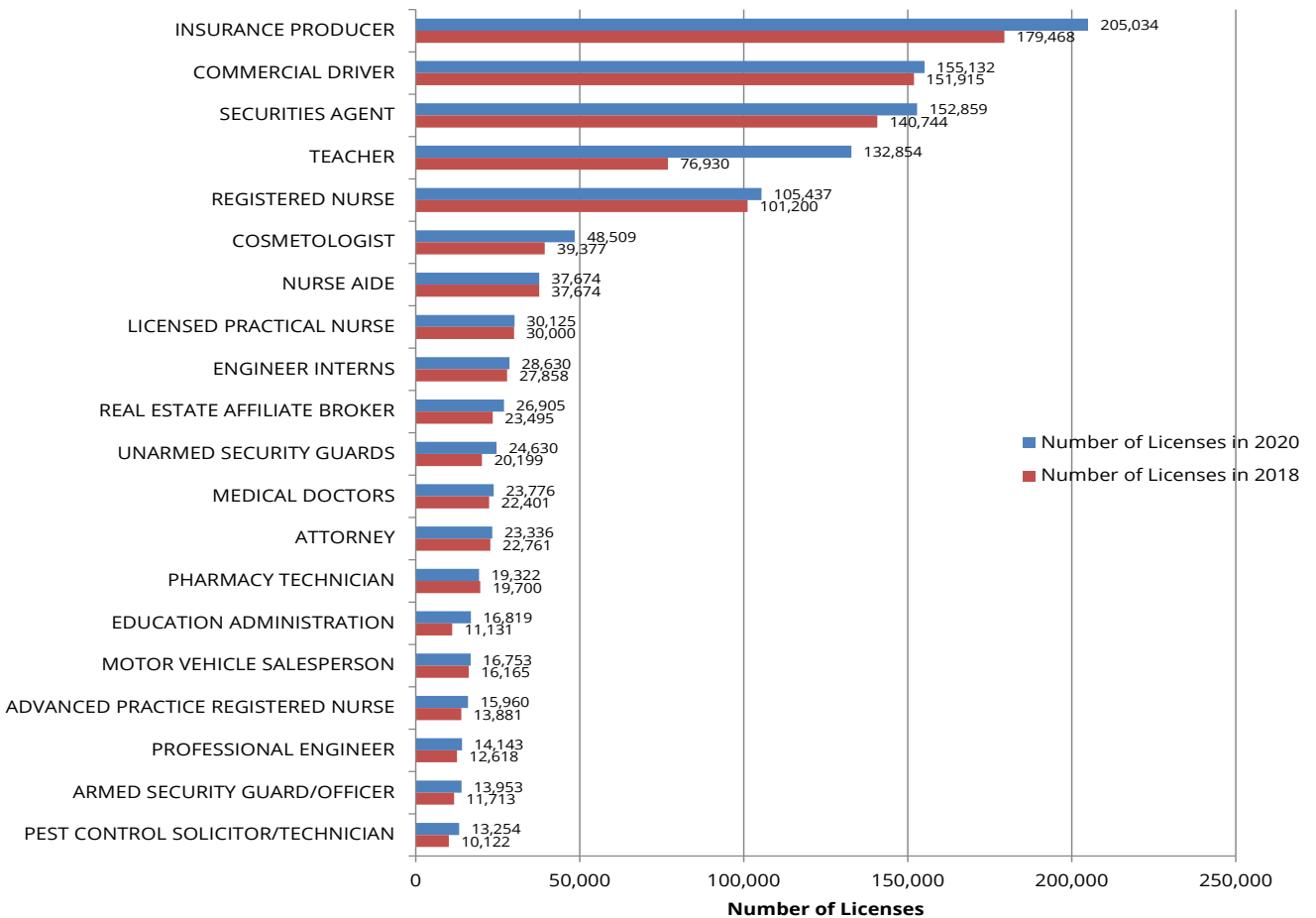
Source: Office of Apprenticeship, Employment and Training Administration, U.S. Department of Labor
 LWDA: NE Northeast; SE Southeast; UC Upper Cumberland; SM Southern Middle; NM Northern Middle; SW Southwest; NW Northwest; GM Greater Memphis

Licensed Occupations

The state department currently monitoring the greatest number of licenses is the Department of Health (78 different licenses), which monitors numerous health related professions and licenses, followed by the Department of Commerce and Insurance (60), responsible for various occupations requiring licenses to provide services safely to insure standard levels of training are achieved by the license holders providing service to the public. A number of other departments monitor specific licensed occupations as their missions and the law dictate. Some examples include the Department of Agriculture monitoring food safety and the safe usage of pesticides and the Department of Labor and Workforce Development which administers certain licenses relating to safety in the workplace.

The top licensed occupations based on number of licensed individuals are maintained by the Department of Commerce and Insurance (C&I) with the licenses related to insurance sales and production. In second place are commercial drivers who are regulated by the Department of Safety, followed closely by an additional group of license holders regulated by Commerce and Insurance working as securities agents. Rounding out the top five licenses by total number in 2020 are teachers overseen by the Department of Education and registered nurses who are licensed with the Department of Health. Based on a comparison of the top 20 licenses issued in 2020 and 2018, the number of licenses issued has increased, except for pharmacy technician. Some licensed occupations can be acquired with less than a bachelor's degree and provide individuals with enhanced employment security.

Number of Licenses by Occupation, 2018 and 2020



Source: TN Department of Labor and Workforce Development, WIR²ED Division

Figure 22

Conclusion

In mid- August 2020 the president of the Federal Reserve Bank of Richmond provided his analysis of the current trends in the economy and future expectations.¹ Consumer demand makes up 70 percent of economic demand. Although savings rates are usually about 6 percent, white collar workers increased their savings to 26 percent in the second quarter of 2020 due to concerns about the coronavirus which has affected demand in the airlines, hotel, travel support, restaurant, and retail industries. Control of coronavirus will be necessary to restore consumer confidence and for the economy to respond.

Many laid-off workers in the leisure and hospitality industries are lower-skilled and part time workers, those usually not eligible for significant unemployment insurance benefits, but needing income relief. At the same time, hiring has continued for skilled trades workers in construction and in technology sectors. A mismatch may exist between those laid off and current business needs, a challenge for workforce services providers. Businesses, consumers, and local and state governments will continue to need assistance from the Federal Reserve through monetary policy as well as from the federal government.

Those hardest hit by the coronavirus have been black and Latinx workers who are also providing essential services in the economy. These same groups are also among those with significant barriers to employment who need critical workforce services.

Tennessee's WIOA goals include increasing access to workforce services, especially for those with significant barriers to employment; aligning workforce investment, education, and economic development; improving the quality and labor market relevance of these investments; improving the delivery of services; and increasing employee and family self-sufficiency while meeting employer needs and enhancing the productivity of the workforce.

Workforce strategies to achieve these goals include those focusing on increasing and/or replacing earnings and income; increasing educational attainment; avoiding crime and delinquency and working with justice-involved individuals; supporting the maintenance and improvement of physical and mental health; and promoting reflective decision making and social engagement to improve self-sufficiency.

A wide variety of initiatives in these areas are being implemented by regional and local workforce development agencies, educational institutions, and economic development agencies (pages 68-75), including greater integration of data collection, planning, and service delivery. The increased use of technology will allow more frequent monitoring of economic conditions and the results of workforce strategies.

¹ T. Barkin. "Perspectives on the economy and what is next for recovery." Webinar August 1, 2020. Sponsored by the Labor Market Information Institute and the Projections Managing Partnership.

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